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How do I limit agent access to tickets by department?

Matias Navarro Carter - 2024-02-07 - Comments (0) - Admin

One function of departments is limiting agent access to tickets.

For example, you can set up your helpdesk so that your support agents only have access to tickets in the Support department, while your sales staff can only access tickets in the Sales department.

You implement this using **agent permission groups** to set department permissions; you can manage them from Agents > Permission Groups in the admin interface.

By default, all your agents are part of the built-in **All Permissions** and **All Non-Destructive Permissions** groups, which provide access to all departments and can't be edited. Therefore, to set up selective department access, you need to remove your agents from those groups.

Edit: All Permissions id: 3 Information Permissions **Departments** Ticket Chat Ticket Can assign to Full access Customer Support Customer Support - EU **a** Customer Support - AUS **(a)** Customer Support - USA **a (a) (a)** Complaints **a** IT Support **((** HR Finance **(6** Sales **(3) a** Training Booking **(a** 0 Test ×

Select the **All Permissions** group Properties tab and remove all the agents who should have limited department access by unselecting the checkboxes. Repeat for All Non-Destructive Permissions.

Edit: All Permissions

Alesia Burvin

Chris Padfield

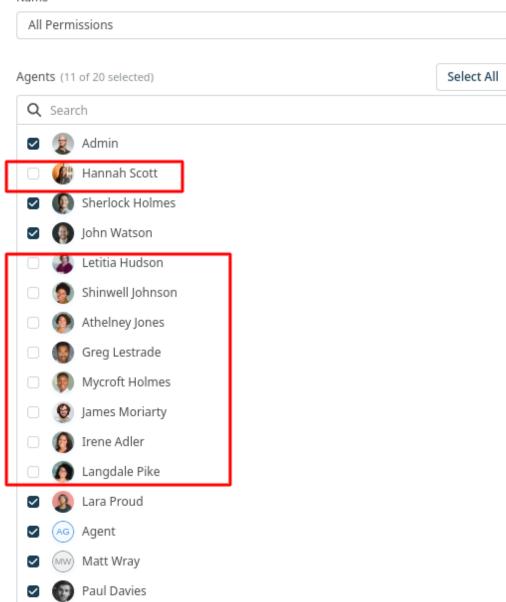
(kw) Kimberley Wilson

Joell

Information Permissions Departments

This is a special built-in permission group that grants all permissions to members. Agents in this group will have full access to the agent interface, including access to all ticket departments.

Name



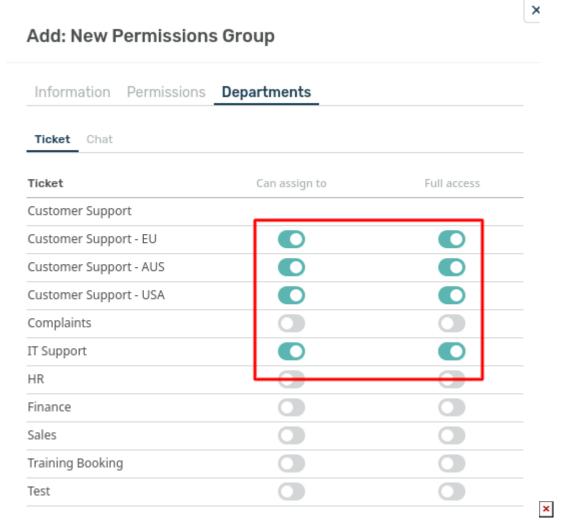
Now you need to grant back all the permissions you have just removed, except that you will grant full access to each department selectively.

There are two ways to do this:

Method 1: Multiple Permission Groups

You can create several different permission groups, each one granting access to a different department (as well as all the other permissions your agents need). If you have a lot of agents to manage relative to the number of departments, this is the best option.

For example, you could create permission groups with Sales department access and Support department access.



You can then assign agents to the appropriate permission group to give them either Sales or Support access.

Add: New Permissions Group

Info	rmation Permissions Departments	
Name		
Sal	S	
Agen	S (5 of 20 selected)	Select All
Q	Search	
	Admin	
☑	Hannah Scott	
	Sherlock Holmes	
☑	John Watson	
	Letitia Hudson	
~	Shinwell Johnson	
$ \mathbf{V} $	Athelney Jones	
$ \mathbf{Z} $	Greg Lestrade	
	Mycroft Holmes	
	James Moriarty	
	Irene Adler	
	Langdale Pike	
	Lara Proud	
	AG Agent	
	Matt Wray	
	Paul Davies	
	Alesia Burvin	
	Joell	
	Chris Padfield	
	Kimberley Wilson	

Method 2: Single Permission Group

You can create a single permission group with no department permissions (but all the other permissions your agents need), and then grant department permissions from individual agent profiles. This may be quicker if you have a low agen to department ratio, e.g. you only have one agent per department.

In this case, you would assign all your agents to the same permission group, then set their department permissions individually.

Properties Permission Depar	tment Notificatio	ns 2FA			
Permission groups are pre-defined sets of permissions you can easily apply to multiple agents. Select the permission groups to apply to this agent:					
Permissions Groups (1 of 7 selected)		Select All			
AIT NOTI-DESTRUCTIVE PERMISSION	5				
☐ All Permissions	All Permissions				
Customer Support Trainees	Customer Support Trainees				
Customer Support	Customer Support				
Customer Support Managers					
✓ IT Support					
☐ Notes only agents					
Any changes you make will not take effect, until you click "Save" Ticket Chat Ticket Can assign to Full access					
Customer Support					
Customer Support - EU		•			
Customer Support - AUS					
Customer Support - USA	•	•			
Complaints					
IT Support					
HR					
Finance					
Sales					
Training Booking					
Test					

Notes

- 1. For departments where the agent doesn't have full access, you can choose to grant 'assign' access. This means the agent is allowed to assign a ticket to that department, but nothing else: so after they assign the ticket, they won't be able to see it.
- 2. You can see which permission groups and individual agents have access to each department by going to **Ticket Structure > Departments**, and looking at the departments' Permission tabs.