

مرکز آموزش > Deskpro Legacy > How can I set up a simple request management process?

?How can I set up a simple request management process

Ben Henley - 2023-09-25 - Comment (1) - Deskpro Legacy

Many organizations have a **request management process** to ensure that desired changes are carried out without disruption. For example, when an IT helpdesk agent gets a request from a user for an upgraded server, there is probably an approval process to decide .if there's budget for the upgrade, when it can be carried out to avoid disrupting work, etc

You can capture your request management process in Deskpro. This article provides a simple example of how to implement a lightweight process, using Deskpro triggers, filters .and custom fields

Required process

:This is the example process we're going to implement

.Tickets are categorised by agents as None/Minimal, Minor, Major, Emergency .1

Tickets involving a Minor or Major change need to be approved by a Change Advisory .2 Board (who have agent accounts and are part of a "Change Advisory Board" team in .(Deskpro

Agents can handle tickets involving a "None/Minimal" change on their own. No need to .3 .bother the Board if a user wants to change their desktop wallpaper

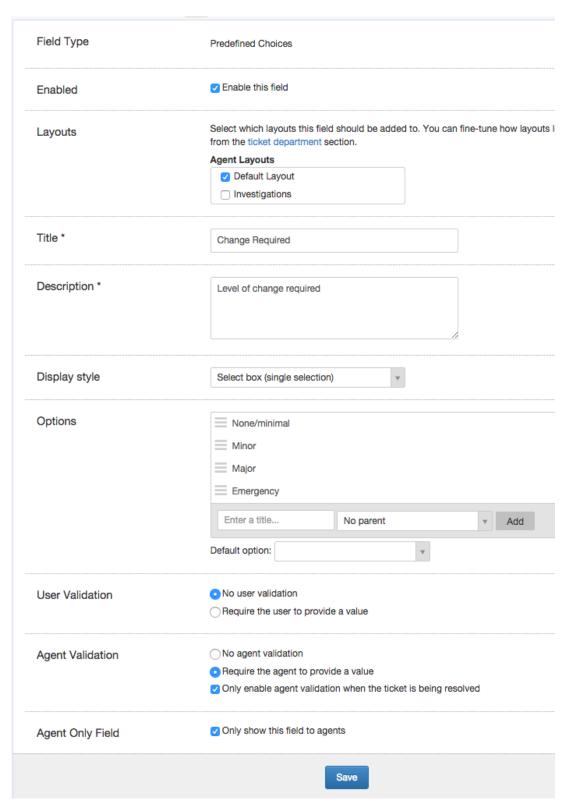
Agents can resolve tickets for an "Emergency" change on their own, but the board must .4 .be notified

This is just an example. You can use the flexibility of Deskpro to implement the exact .process your organization requires

Implementing the process

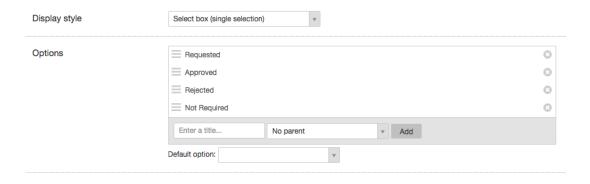
First, we use custom ticket fields (**Tickets** > **Fields**) to record the change level and the .approval status

:Here's the Change Required field

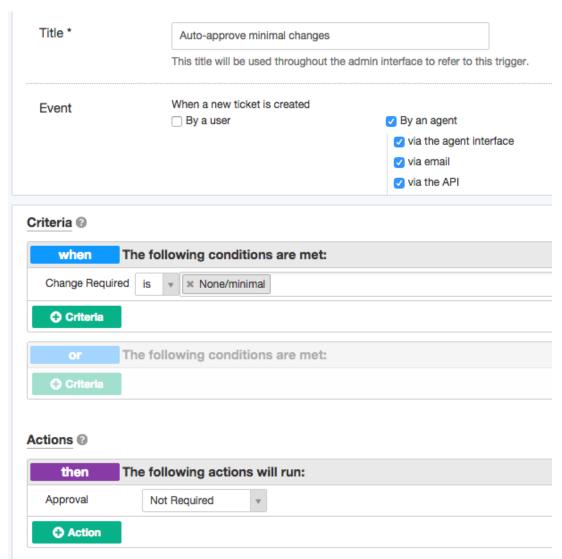


We made it an Agent Only Field because users don't get to decide the change level. The level of change might not be obvious at first, so we chose to require a value only when the .ticket is being resolved

We also make another custom field called Approval status, with the same settings but these :values

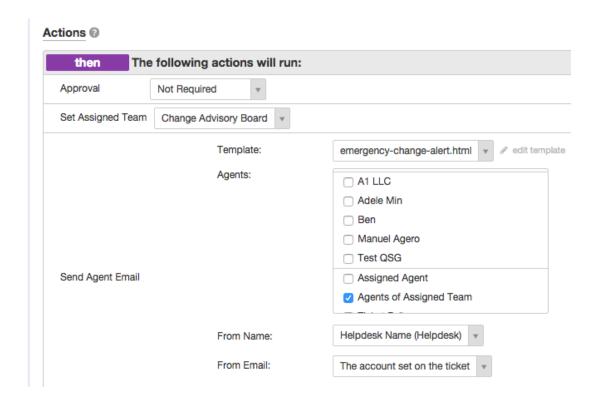


When agents set a Change Required value of "None/Minimal", we can automatically set Approval to "Not Required". This is implemented with triggers. First, a **Ticket** :**Update** trigger



If an agent creates a ticket and sets the Change Required value straight away, we'll want to .do the same thing, so we create an identical **New Ticket** trigger

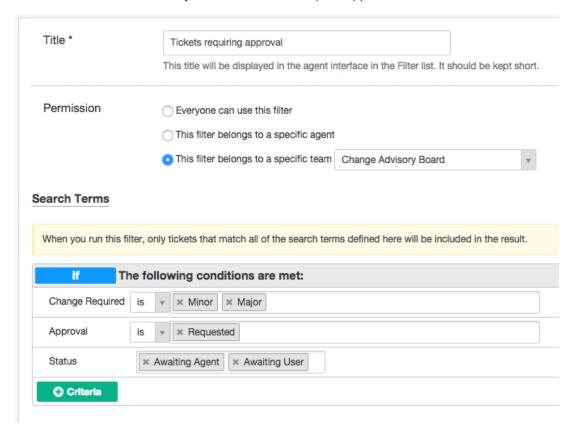
We can create a similar pair of triggers for when an agent sets Change Required to :"Emergency". We also want to notify the Board, so we add this action



.This means that the Board get a custom email alert when a ticket is classed as Emergency

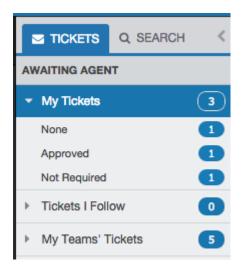
For Minor or Major tickets, we rely on the agents to set the Approval field to "Requested" .when the ticket is ready for the Board's attention

:To enable the Board to easily see which tickets require approval, we create a filter like this

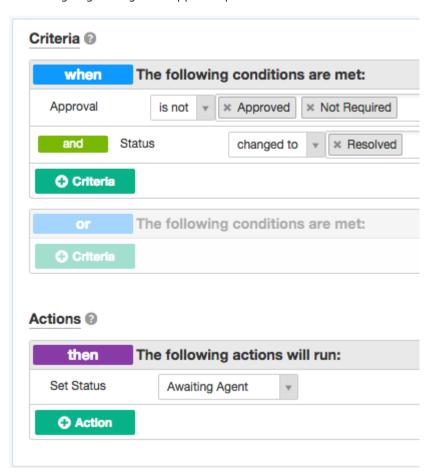


The Board agents can change the approval to "Approved" or "Rejected", and the agent assigned to a ticket will see the change and get a ticket notification

:Agents could also group tickets by Approval to get an overview



We could also add a **Ticket Update** trigger to make sure that tickets aren't resolved :without going through the approval process



Now it's easy to see where tickets are in the approval process, and the Board can always .see which tickets need their approval

This is a simple example, but using the same approach you can capture the process your .organization needs to follow