How do I limit agent access to tickets by department?

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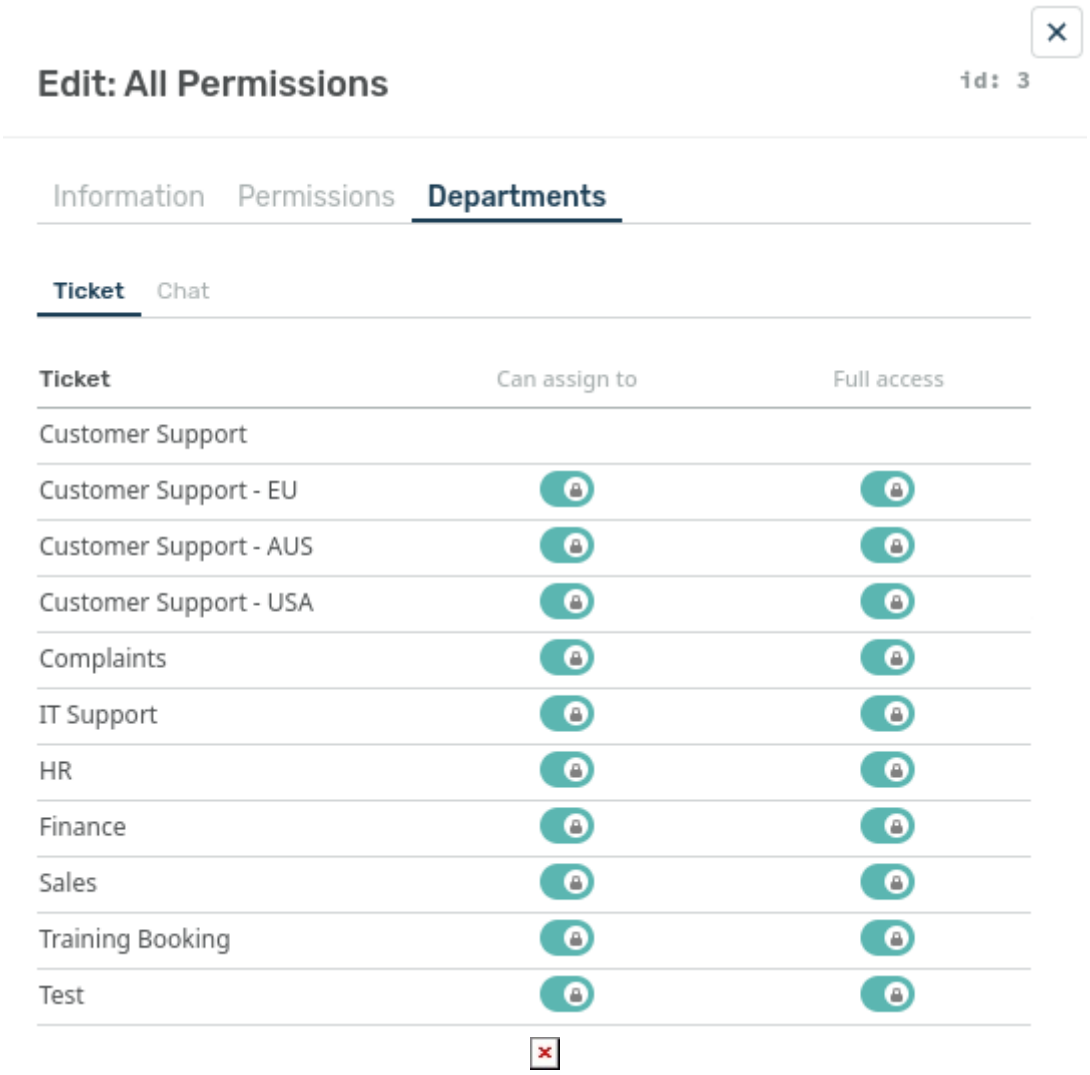
One function of departments is limiting agent access to tickets.

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.



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

id: 3

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

All Permissions

Agents (11 of 20 selected) Select All

Search

- [x] Admin
- [ ] Hannah Scott
- [x] Sherlock Holmes
- [x] John Watson
- [ ] Letitia Hudson
- [ ] Shinwell Johnson
- [ ] Athelney Jones
- [ ] Greg Lestrade
- [ ] Mycroft Holmes
- [ ] James Moriarty
- [ ] Irene Adler
- [ ] Langdale Pike
- [x] Lara Proud
- [x] Agent
- [x] Matt Wray
- [x] Paul Davies
- [x] Alesia Burvin
- [x] Joell
- [x] Chris Padfield
- [x] Kimberley Wilson

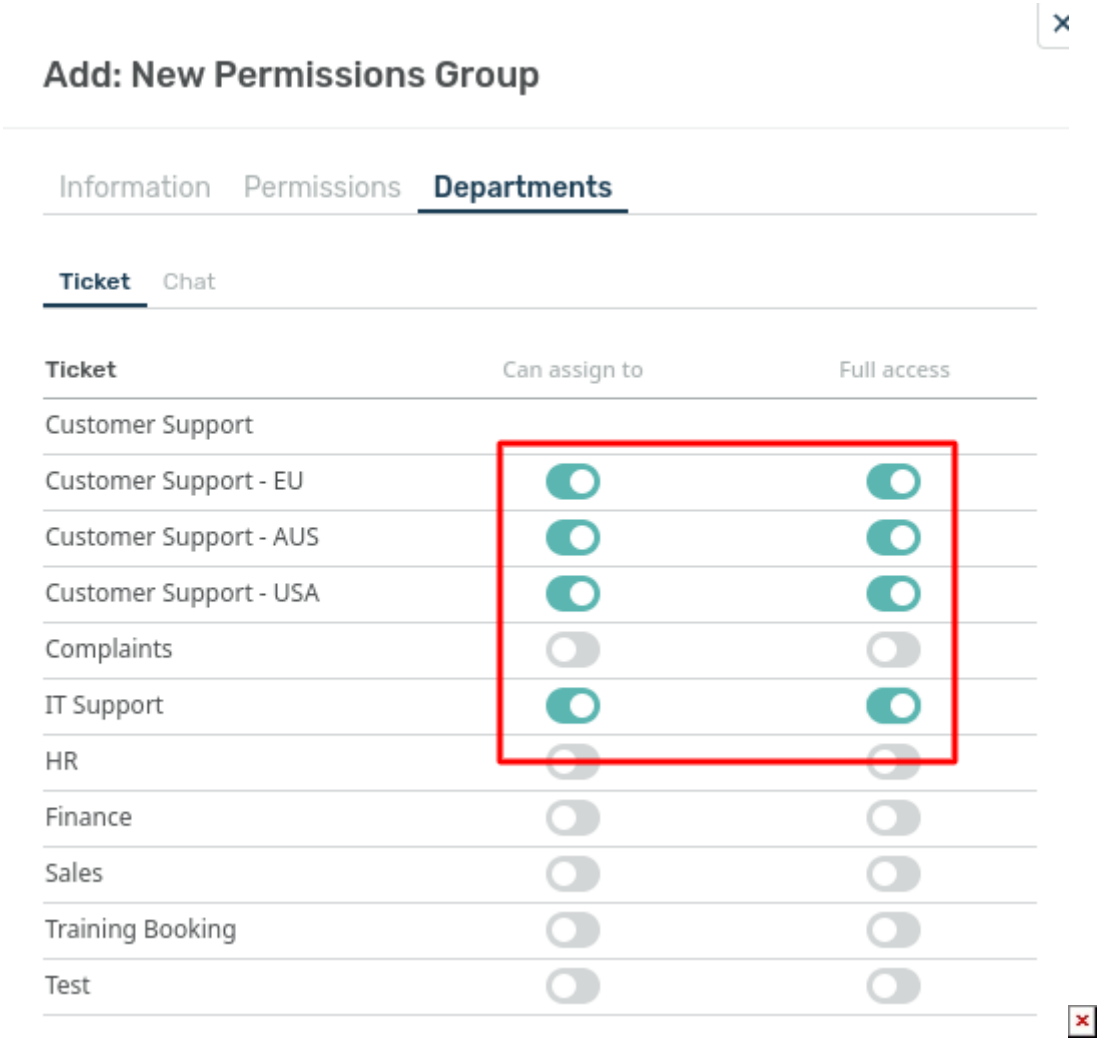
Now you need to grant back all the permissions you have just removed, except that you will grant full access to each department selectively.

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

Information | Permissions | Departments

Name

Sales

Agents (5 of 20 selected) Select All

Search

- [ ] Admin
- [x] Hannah Scott
- [ ] Sherlock Holmes
- [x] John Watson
- [ ] Letitia Hudson
- [x] Shinwell Johnson
- [x] Athelney Jones
- [x] Greg Lestrade
- [ ] Mycroft Holmes
- [ ] James Moriarty
- [ ] Irene Adler
- [ ] Langdale Pike
- [ ] Lara Proud
- [ ] AG Agent
- [ ] MW Matt Wray
- [ ] Paul Davies
- [ ] Alesia Burvin
- [ ] Joell
- [ ] Chris Padfield
- [ ] KW 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.

Edit: Langdale Pike

id: 12

Properties | Permission | **Department** | Notifications | 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

- [ ] All Non-Destructive Permissions
- [ ] All Permissions
- [ ] Customer Support Trainees
- [ ] Customer Support
- [ ] Customer Support Managers
- [x] IT Support
- [ ] Notes only agents

Permissions Groups — Override Permissions

This will unlock the toggles below and remove this agent from all permission groups. 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	on	on
Customer Support - AUS	on	on
Customer Support - USA	on	on
Complaints	off	off
IT Support	on	on
HR	off	off
Finance	off	off
Sales	off	off
Training Booking	off	off
Test	off	off

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.