



[지식 베이스](#) > [Using Deskpro](#) > [Agent](#) > [How do I make tasks visible to certain agents, teams, or departments?](#)

How do I make tasks visible to certain agents, teams, or departments?

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Managing the visibility of Tasks within your helpdesk is crucial for optimizing department, team, and individual agent workloads. You can control which Tasks are visible to different groups in the helpdesk by adjusting the **Visibility** and **Assignment** settings in individual Tasks.

Configuring Task Visibility

When you're configuring **Visibility** settings, you will have the choice between **Public**, **Private**, or **Departments**.

The screenshot shows a 'New Task' form with the following fields and values:

- Description*: Sending a client email
- Due date: 15 November 2023 09:30 (with a 'Clear' button)
- Assign to: (M) Me
- Visibility: (P) Public

The Visibility dropdown menu is open, showing the following options:

- Public (selected with a checkmark)
- Private
- Customer Support
- Customer Support - EU
- Customer Support - AUS
- Customer Support - USA
- Complaints
- IT Support
- HR

Private: This setting ensures that only the creator and assignee of the task can view it.

Public: Opt for this option if you want all agent accounts associated with your helpdesk to have access to the task.

Departments: If you've opted for a department-specific visibility setting. This ensures that only agents from the designated department can view the Task.

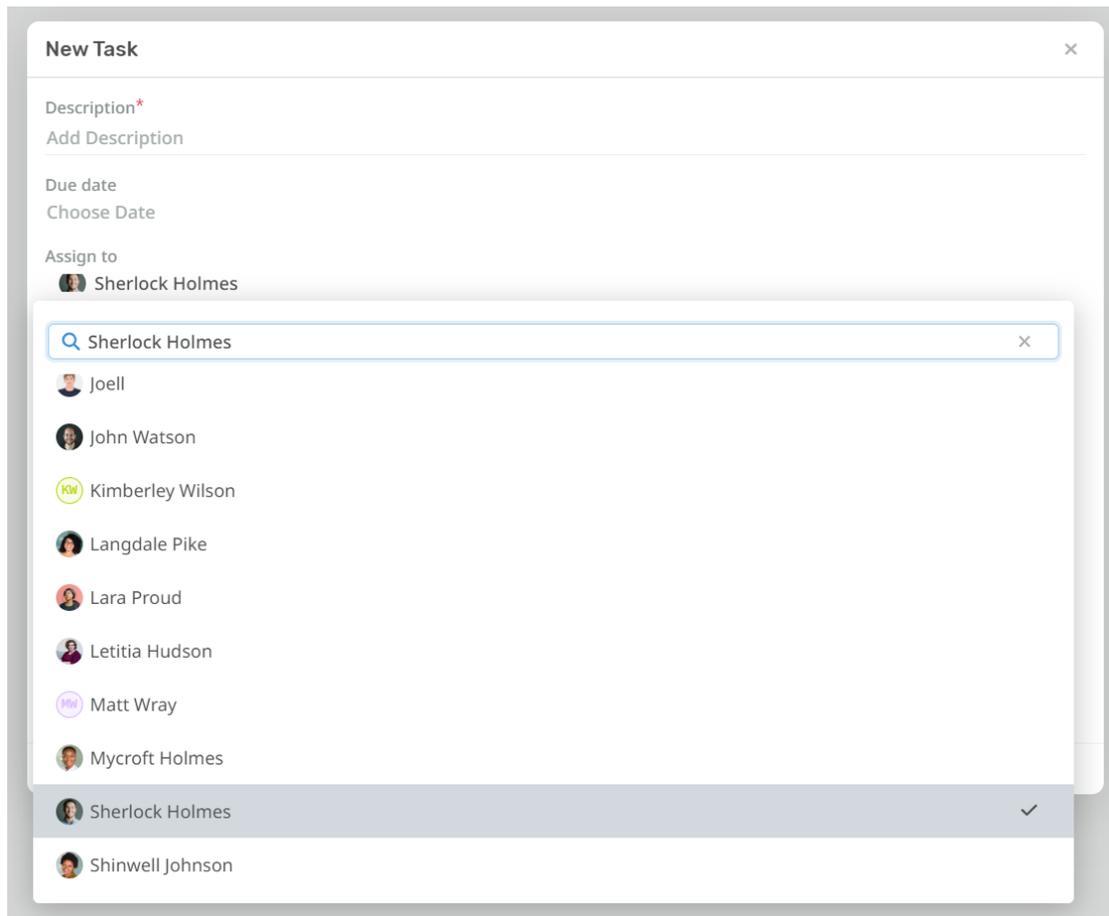
Assigning Tasks to Agents or Teams

After configuring the visibility of a Task, you can then assign the Task to the appropriate Agent or Team. The Assignment will interact with the visibility, so if a task is private and you assign it to a Team, only that team will be able to see the Task.

For assigning Tasks, the following choices are available:

Team Assignment: Assign the task to the relevant team. If visibility is private, this restricts task visibility to agents within the assigned team.

Agent Assignment: Assign a specific agent. Again, if visibility is set to private, only the agent that is directly assigned the Task will be able to view it.



The image shows a 'New Task' dialog box with a search and selection interface. The dialog has a title bar 'New Task' with a close button. Below the title bar, there are three input fields: 'Description*' with a placeholder 'Add Description', 'Due date' with a placeholder 'Choose Date', and 'Assign to' with a dropdown menu. The dropdown menu is open, showing a search bar with 'Sherlock Holmes' and a list of agents. The agents listed are Joell, John Watson, Kimberley Wilson (with initials KW), Langdale Pike, Lara Proud, Letitia Hudson, Matt Wray (with initials MW), Mycroft Holmes, Sherlock Holmes (highlighted with a checkmark), and Shinwell Johnson.

New Task [Close]

Description*
Add Description

Due date
Choose Date

Assign to
Sherlock Holmes

Search: Sherlock Holmes [Close]

- Joell
- John Watson
- KW Kimberley Wilson
- Langdale Pike
- Lara Proud
- Letitia Hudson
- MW Matt Wray
- Mycroft Holmes
- Sherlock Holmes ✓
- Shinwell Johnson

New Task ✕

Description*
Sending a client email

Due date Clear
15 November 2023 09:30

Assign to
(C) Complaints

✕

- (M) Me
- (2E) 221B Energy Support
- (2L) 2nd Line Support
- (C) Complaints ✓
- 👤 Customer Support Managers
- 💻 IT Support
- (PT) PDF Team
- (S) Sales
- (ST) SC Team

This level of granularity is useful for Tasks that contain sensitive information and ensures that tasks are visible only to those who need to work on them, optimizing efficiency and promoting seamless teamwork.