

Setting Up an Escalation to Restrict Agent Access to Archived Tickets

Kim - 2024-08-22 - Comments (0) - Using Deskpro

Overview

To comply with data protection regulations, it's crucial to control access to sensitive ticket information. One effective method is to use **escalations** to automatically archive tickets after a set period, restricting access to only authorized personnel. This ensures that sensitive data remains protected while still allowing for access when necessary for audits, compliance reviews, or legal inquiries.

Step 1: Setting Up a Dedicated Department

Departments in Deskpro are essential for organizing your helpdesk and managing access control. For this process, we'll create a dedicated department called '**Archived Tickets**' to house the tickets that have been archived.

Instructions:

1. **Navigate to:** Admin > TICKET STRUCTURE > Departments > + New
2. **Create a New Department:** We will name it "**Archived Tickets**" to clearly reflect its purpose.



This department will serve as the repository for all archived tickets.

Step 2: Configuring Permission Groups

To ensure that only specific users can access these archived tickets, you'll need to configure a **Permission Group**. This allows you to grant access to the 'Archived Tickets' department selectively.

Instructions:

1. **Navigate to:** Admin > Agents > Permission Groups > + New

2. **Create a Permission Group:**

- Assign permissions that allow access to the **Archived Tickets** department.



3. **Assign Agents:**

- In the 'Information' tab, select the agents who should be part of this group.
- These agents will now have access to tickets within the 'Archived Tickets' department.

Step 3: Setting Up the Escalation Rule

With the department and permissions in place, the next step is to create an escalation rule that automatically archives tickets after they've been resolved for a specified period.

Instructions:

1. **Navigate to:** Admin > Business Rules > Escalations > + New

2. **Define the Event:**

- Condition: The ticket has been resolved for **> 13 weeks**.
- You can add additional criteria if needed (e.g., by department or label), but for this example, we'll archive all tickets after 13 weeks.

3. **Specify the Action:**

- **Assign to Department:** Select **Archived Tickets**.
- **Unassign Agents:** Remove any assigned agents from the ticket.
- **Remove Followers:** Ensure no agents are following the ticket.



With this setup, tickets will be automatically archived after 13 weeks, and only authorized personnel within the specified Permission Group will have access. This approach helps ensure that your organization remains compliant with data protection regulations by controlling who can view and manage historical ticket data.