

How can I set up a simple request management process?

Ben Henley - 2023-09-25 - Comments (0) - 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:

1. Tickets are categorised by agents as None/Minimal, Minor, Major, Emergency.
2. Tickets involving a Minor or Major change need to be approved by a Change Advisory Board (who have agent accounts and are part of a "Change Advisory Board" team in Deskpro).
3. Agents can handle tickets involving a "None/Minimal" change on their own. No need to bother the Board if a user wants to change their desktop wallpaper.
4. Agents can resolve tickets for an "Emergency" change on their own, but the board must 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:

Field Type	Predefined Choices
Enabled	<input checked="" type="checkbox"/> Enable this field
Layouts	<p>Select which layouts this field should be added to. You can fine-tune how layouts look from the ticket department section.</p> <p>Agent Layouts</p> <div> <input checked="" type="checkbox"/> Default Layout <input type="checkbox"/> Investigations </div>
Title *	<input type="text" value="Change Required"/>
Description *	<div><div>Level of change required</div></div>
Display style	<div>Select box (single selection) ▼</div>
Options	<div> <div> <div>≡</div> <div>None/minimal</div> </div> <div> <div>≡</div> <div>Minor</div> </div> <div> <div>≡</div> <div>Major</div> </div> <div> <div>≡</div> <div>Emergency</div> </div> </div> <div> <input type="text" value="Enter a title..."/> <input type="text" value="No parent"/> <input type="button" value="Add"/> </div> <div> Default option: <div>▼</div> </div>
User Validation	<input checked="" type="radio"/> No user validation <input type="radio"/> Require the user to provide a value
Agent Validation	<input type="radio"/> No agent validation <input checked="" type="radio"/> Require the agent to provide a value <input checked="" type="checkbox"/> Only enable agent validation when the ticket is being resolved
Agent Only Field	<input checked="" type="checkbox"/> Only show this field to agents

Save

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:

Display style

Select box (single selection)

Options

Requested

Approved

Rejected

Not Required

No parent

Add

Default option:

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:

Title *

Auto-approve minimal changes

This title will be used throughout the admin interface to refer to this trigger.

Event

When a new ticket is created

☐ By a user

☒ By an agent

☒ via the agent interface
☒ via email
☒ via the API

Criteria ?

when

The following conditions are met:

Change Required

is

None/minimal

Criteria

or

The following conditions are met:

Criteria

Actions ?

then

The following actions will run:

Approval

Not Required

Action

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:

Actions

then	The following actions will run:	
Approval	Not Required ▼	
Set Assigned Team	Change Advisory Board ▼	
Send Agent Email	Template:	emergency-change-alert.html ▼ edit template
	Agents:	<div><input type="checkbox"/> A1 LLC</div> <div><input type="checkbox"/> Adele Min</div> <div><input type="checkbox"/> Ben</div> <div><input type="checkbox"/> Manuel Agero</div> <div><input type="checkbox"/> Test QSG</div> <div><input type="checkbox"/> Assigned Agent</div> <div><input checked="" type="checkbox"/> Agents of Assigned Team</div>
	From Name:	Helpdesk Name (Helpdesk) ▼
	From Email:	The account set on the ticket ▼

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:

Title *	Tickets requiring approval	
	This title will be displayed in the agent interface in the Filter list. It should be kept short.	
Permission	<div><input type="radio"/> Everyone can use this filter</div> <div><input type="radio"/> This filter belongs to a specific agent</div> <div><input checked="" type="radio"/> This filter belongs to a specific team</div>	
	Change Advisory Board ▼	
Search Terms		
When you run this filter, only tickets that match all of the search terms defined here will be included in the result.		
if	The following conditions are met:	
Change Required	is ▼	<input type="checkbox"/> Minor <input type="checkbox"/> Major
Approval	is ▼	<input checked="" type="checkbox"/> Requested
Status		<input checked="" type="checkbox"/> Awaiting Agent <input checked="" type="checkbox"/> Awaiting User
+ Criteria		

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:

TICKETS		SEARCH	
AWAITING AGENT			
▼	My Tickets		3
	None		1
	Approved		1
	Not Required		1
▶	Tickets I Follow		0
▶	My Teams' Tickets		5

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

Criteria ?

when

The following conditions are met:

Approval

is not

× Approved

× Not Required

and

Status

changed to

× Resolved

Criteria

or

The following conditions are met:

Criteria

Actions ?

then

The following actions will run:

Set Status

Awaiting Agent

Action

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.