HelpDesk

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Artologik®
SOFTWARE FOR THE WEB

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General

Two-factor authentication

In the menu *Administration > System settings > Advanced* you now have the possibility to enable the two-factor authentication feature. This means that the users will not log in to HelpDesk with their user name and password only anymore, but that they will also have to enter a one-time authorisation code sent via e-mail to their individual e-mail address.

PLEASE NOTE! Before you activate this function, please make sure that:

- All users that shall be able to log on to Artologik Helpdesk have a valid e-mail address in their profile
- The e-mail account used for the sending of the e-mails containing the codes is working.

Otherwise, the users will not be able to log in.

Drag and drop files to desktop

Until now HelpDesk allowed support members to drag and drop files into the tickets. It is now possible to also do the reverse manipulation: drag and drop FROM the ticket, directly onto your desktop (or a folder on your desktop, you choose!).

The system works:

- for both the support members and the customers
- with one file at a time
- with files attached to both the tickets and the e-mails

Improvements for the mobile view

We have made some improvements for those working in HelpDesk on mobile devices:

- *Delegate* button added
- Larger text and buttons within the ticket form
- Larger text in the simplified ticket list
- Priority colours shown in the ticket list
- Larger buttons in the toolbar

Tickets

Customised ticket lists under New ticket menu

After selecting a user under the *New ticket* menu, you previously had access to two lists of tickets: *All tickets registered for this user* and *Opened tickets registered for this organisation*. By checking these lists, you could make sure that a ticket you were about to register was not already registered in the system. Next to each ticket, you could click the 🔲 icon to view the ticket in a new window, or the 🔲 icon to go to the ticket. These two lists, we have now improved in several ways.

The lists are now displayed as ticket lists, similar to the ones available under the *Tickets* menu. This means that they have the same headings as the ordinary ticket lists and that you can go to a ticket by clicking anywhere on its row. The 🔲 icon is still available if you do not want to go to the ticket but just view it.

Furthermore, you can edit the ticket lists to make them show another selection of tickets. After upgrading to this version, the lists will still be called (and show) *All tickets registered for this user* and *Opened tickets registered for this organisation*, but by clicking

the *Edit* button to the right of the list's heading, you can change its selections and rename the list accordingly.
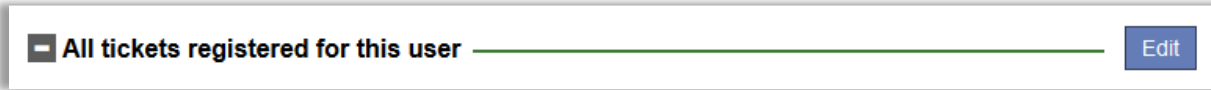
When editing these ticket lists, you have access to the same selections as when you edit the ticket lists under the *Tickets* menu. In addition, you can for some of the criteria select the option *From ticket form*. These are *Registered for*, *Organisation*, *Organisation group*, *Final customer*, *Object* and *Object group*.

Selecting this option means that the list will be automatically filtered according to the selections you make when registering the ticket. In the example below, the option *From ticket form* is selected for *Organisation* and *Object* and the list name is changed accordingly.
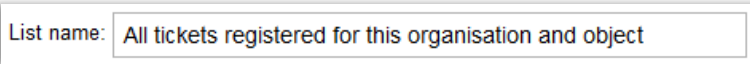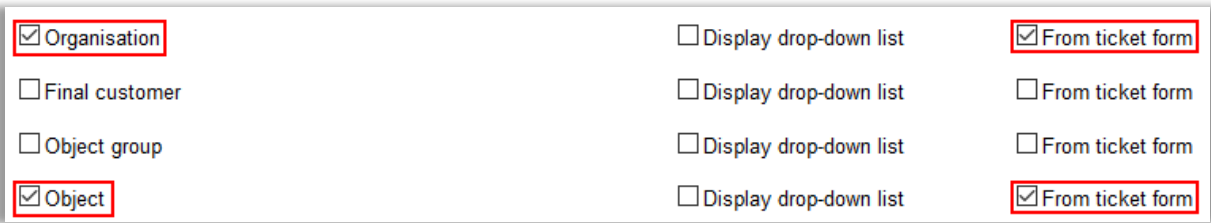
In the example, as soon as an object is selected on the *New ticket* page, the ticket list will be automatically filtered to show only tickets of that object.
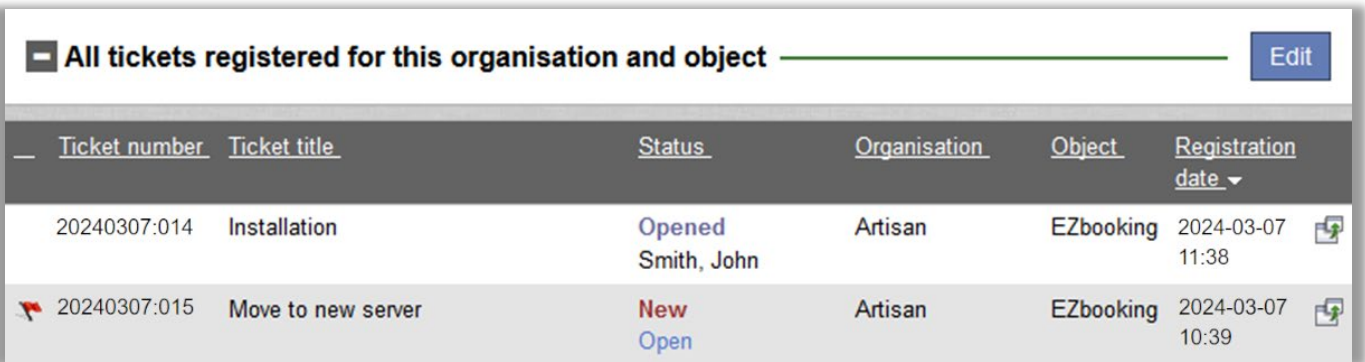
Ticket number search field in the main menu

If you are looking for a certain ticket, you can now search for this ticket by entering its ticket number in the new search field at the top of the main menu.
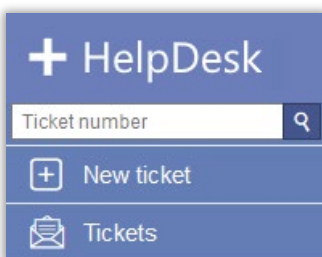
Set e-mails as unread

An e-mail icon is shown for the tickets that have new and unread e-mails.

Until now, you could only click the icon once, to mark e-mails connected to the ticket as "read".

With the new version you have the possibility to access the icon at any time and mark e-mails for the ticket as "read" or unread" whenever you need it.
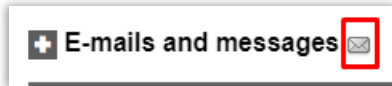
New printing features to PDF and ZIP

When printing a ticket to PDF, you now have two more options:
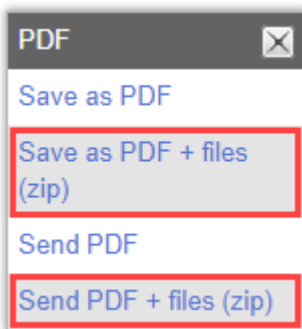
The data that will be contained in those printings will depend on the settings you have made in the menu *Administration > System settings > Advanced > section 'Settings for ticket printing and pdf'* (see previous part above).

Save as PDF + files (zip):

When choosing this option, you get a zip file to download and save to your computer. Inside the zip file, you will get access to:

- your ticket printed to PDF
- the files uploaded to your ticket

Send PDF + files (zip):

When choosing this option, you get a zip file directly uploaded to an e-mail, without any pre-filled recipient e-mail address. Inside the zip file, you will get access to:

- your ticket printed to PDF
- the files uploaded to your ticket

Lists of attachments

In the menu *Administration > System settings > Advanced > General > Functions*, you can activate the setting:

Inside your tickets, you will now find in the section 'Attached files' two areas:

- Files attached to the ticket, where you find:
    - o the files you manually uploaded to the ticket
    - o the files you manually saved from an incoming e-mail to the ticket

- E-mail attachments, where:
    - o all attachments received in incoming e-mails to HelpDesk are automatically saved
    - o all attachments uploaded to e-mails sent from HelpDesk are automatically saved

Inside the ticket:

When displaying your ticket without section tabs and if the 'Attached file' section contains many files, HelpDesk displays a message at the bottom of the section informing of how many files are hidden:

Click this link to access all hidden files.

List of actions

The list of actions now also contains the Action description.

View when using section tabs:

View when not using any section tab:

Ticket list – filter tickets on "younger than"

Each support member can create his/her own ticket lists from the menu *Tickets*, by clicking the *Edit ticket list* icon:

Until now it was only possible to set up a filter on the tickets *Older than x days/hours/minutes*.

You have now access to the following new filter option *Younger than x days/hours/minutes*:
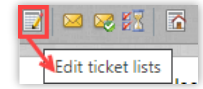
Show object group in ticket list

At *Administration > Application settings > Ticket list* an administrator defines what headings shall be visible in the list of tickets. Now it is also possible to show the Object group as a column in that list, provided that object group is used (defined in *System settings* to use object group or not).

If the support personnel are allowed to define their own headings, they can in their profile or at *Ticket > Edit ticket lists: Headings* also select if they want to show object group as a column in their ticket lists.

Show 'delegated to' in ticket list

In the ticket list it is now possible to see the name of the support group or the person the ticket was delegated to:

- When a ticket is delegated to a whole support group, the column "status" shows the status "Delegated" as well as the name of the support group the ticket was delegated to.

- When a ticket is delegated to a specific member of the support (in the same or in another support group), the column "status" shows the status "Delegated" as well as the name of the person the ticket was delegated to.

Ticket lists as shortcuts in Tickets menu

When working with tickets you have your own ticket lists available in a select box at the top of the page when you're at the Tickets menu. To change to another ticket list, you select a new one in the selectbox.

If you have many lists, but only a few of them that you normally work with, you can decide to add these as shortcuts in the menu. They will then appear as sub-menus in the *Tickets* menu where you can easily click to change to another list.
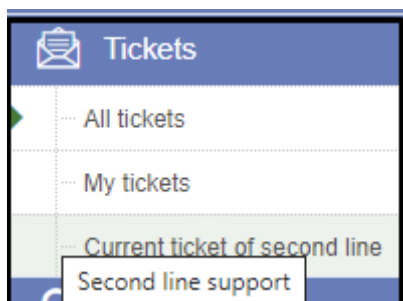
The lists are presented in the same order as the lists in the selectbox at the top, i.e. first your own ticket lists in Alphabetic order. Then the lists of your support groups. Notice that by hovering over the name of the support group list with your mouse, the name of the support group will be shown.

When editing a ticket list: check the setting "Show as shortcut in the Ticket menu" if it shall be displayed directly in the menu as a submenu.
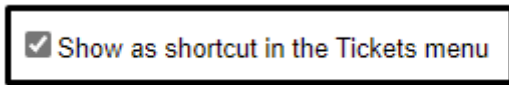
This is available for support personnel who are allowed to create/edit their own ticket lists as well as for administrators via the menu *Administration > Support groups > Basic information > Ticket lists for this support group*. Activate the setting in the desired support group ticket list.

Then select, per support group member, in the list of users belonging to the support group, whether they shall see the group's ticket lists as a shortcut or not.
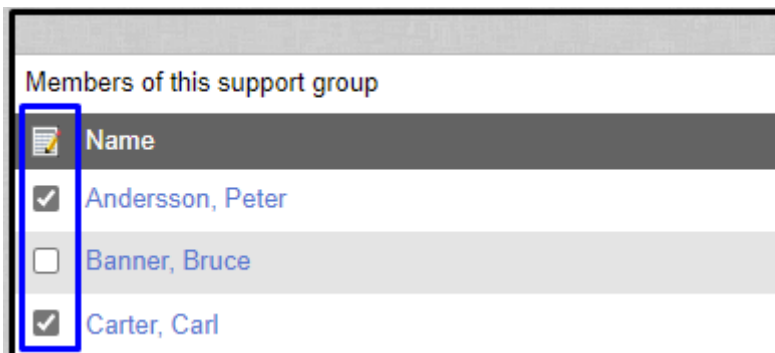
Quick-case tickets – multiple registration (HD-Advanced)
When using Quick-case tickets, you can now key in the exact number of quick-case tickets you want to register at once.

After you have entered the number of tickets you want to be created, click 'Create tickets'. You will get a confirmation at the top of your page, of the number of tickets that will be created:
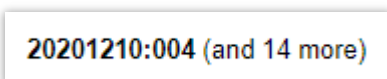
The tickets will get numbers following the one of their original ticket.

The maximum number of quick-case tickets that can be registered at once is 20. If you try to register more, you get an alert. When you click OK, HelpDesk rounds the number down to 20:

You are limited to the creation of a maximum of 20 quick-case tickets at once

OK

After you have filled in the information for the quick-case ticket and entered the solution, you can close it. All of its copies will be created and closed at once. The following confirmation will be displayed on your page:

Ticket number: **20201211:001** has been closed.

Copies of the same quick-case ticket which have also been closed:

20201211:002
20201211:003
20201211:004
20201211:005

Associated tickets – search for primary ticket (HD-Advanced)

Inside the tickets, a search field was added to the drop-down list where you can choose which Primary ticket shall be connected to the ticket you are working with now. You can make a search on any part of the ticket number or ticket title.

Associated ticket(s)

Primary ticket:

search on ticket number or text here...   🔍

No hits

Questions to show in the ticket form – all or answered

At the top of the ticket form, you can now choose to show *All questions* or only *Answered questions*. Which option is pre-selected is decided by a system setting under *Administration > System settings > Advanced*. Please note that mandatory questions are always displayed.

| Ticket | Delegate | History |

○ All questions ● Answered questions ⓘ

Search

Anonymise a single ticket

The Administrators can now decide to anonymise a specific ticket before the automatic rules have anonymised its content.

Open the menu *Search Solution > Advanced Search*. Find the ticket to be anonymised. At the bottom of its page, you will see the button:

Last edited 2021-10-15 11:49 by Admin Adminmaster

| Anonymise the ticket | Delete ticket | Back | Close |
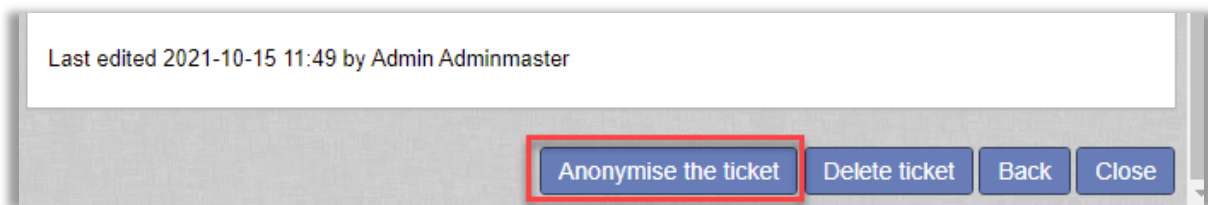
Once you click the button, a page with all the data that you are about to anonymise is shown. This choice of data is the one you can choose in the menu Administration > System settings > Automatic removal/anonymisation > Activate automatic removal/anonymisation of tickets.

Confirm in the popup that you really do want to anonymise the chosen ticket.

FAQ administration

New user role - FAQ ticket Owner

The *FAQ ticket owner* is a person of the support team (Administrators and/or Ticket Operators), that can be selected on FAQ tickets as "owner".

You can be selected as a ticket owner, if:
- you have the right to provide support for the object of the ticket
- you have the right to edit tickets of the FAQ

It is only possible to select one 'Owner' per ticket.

The ownership defines who will get the reminders informing an update is needed for a specific ticket of the FAQ, but it does not define who is allowed to edit its content. Various settings inside HelpDesk define who can edit tickets of the FAQ, and as a consequence, who can be owner as well:

In the menu Administration > System settings > Advanced > section 'FAQ', you can decide on the permissions to edit the tickets in the FAQ:

Application settings
System settings
— Advanced
— Languages and program texts
— Countries
— Design
— Opening hours
— Week numbers

FAQ
☐ Use FAQ status
☐ Make it possible to create tickets for the FAQ only
☐ Only tickets added to FAQ lists are available at Search solution
☐ Allow HTML code in the ticket description and solution on FAQ tickets

☐ Allow ticket operators to edit FAQ lists
☑ Allow ticket operators to edit FAQ tickets
  ☑ This permission is set on user level
  ☑ Operators can only edit FAQ tickets connected to objects they support and FAQ tickets without object connection
☐ Send reminders to FAQ ticket owners

If you have chosen '*This permission is set on user level*', you will also get access to a setting inside the Administrators' and Ticket Operators' own profiles:

FAQ

☐ Can edit FAQ tickets

Select an owner for tickets of the FAQ

When creating or editing a ticket of the FAQ on either of the following menus: *FAQ Administration > All tickets* and *FAQ Administration > FAQ tickets*, you can select a *Ticket Owner* for each of your tickets:

FAQ-0001

Object group:	Artologik
Object:	Administration
Language:	Swedish
FAQ status:	Published
Owner:	Ticket operator, Olof (olof)

In the menu FAQ Administration > All Tickets, filter and display owners

In the search area, you can select amongst all or specific ticket owners as a filter to display your list of tickets. In the rendered list, you will see a column containing the name of the owner for each ticket.

FAQ ticket search – enhanced filters

In the menu FAQ Administration > All tickets, you have now access to the new features, both as search filters and as a displayed data.

New filters in the search:

-    Update period (time frame to search for tickets that were last updated during that period)
-    Owner (of the ticket)

New columns in the list of results:

-    Last update (when the ticket of the FAQ was last updated)
-    Owner (of the ticket)
-    Registered date (when the ticket was created inside HelpDesk)

Both the search filter and the displayed results will allow you to select and see users who are officially owners of tickets but who were inactivated or whose right to handle the object of the ticket was removed.

Users who were inactivated in HelpDesk

The name of the user in the list shows preceded by two stars and in italics: **olof

If you want to edit a ticket whose owner was inactivated inside the HelpDesk user administration, you will have to first select a new owner, and then save your modifications.

Inside a ticket of the FAQ, the owner selection list will not display the users that were inactivated in HelpDesk.

Users who do not anymore have the right to modify the tickets of the FAQ

When a user profile is modified and the right to edit the tickets of the FAQ is removed for this person:

The name of the user in the lists is shown in red: olof

Users who are not allowed to handle the object that the ticket of the FAQ is registered on

The name of the user does not show in the owner drop-down list, inside the ticket.

FAQ list of tickets - exportation

In the menu *FAQ Administration > All tickets,* you can choose which tickets of the FAQ you wish to export.

First, create a list using the filters available on the page. When a list of results is rendered, click the [Excel icon] button, at the top right of the list. The Excel file will be created and available for you to save on your computer.

The data you will export will be the one visible on your screen.

FAQ – E-mail reminders to ticket owners

To inform ticket owners that their tickets have not been updated for a while, you can activate the sending of a reminder e-mail. A standard e-mail containing the ticket number of the ticket that shall be reviewed is sent to the owner.

To update their tickets, the owners will log in to HelpDesk as usual.

Set up the reminders in the menu *Administration > System settings > Advanced > General > FAQ*:

Reports

Grouping by object with regard to placement in object tree

If you are using HD-Advanced, you can build an object tree where the objects can be placed in a hierarchical structure with object groups on the highest level and parent/child objects below. You can also copy an object to let it appear in several places in the object tree.

In the reports where it is possible to make a grouping (*Volume report*, *Ticket handling time*, *Ticket volume* and *SLA report*), we
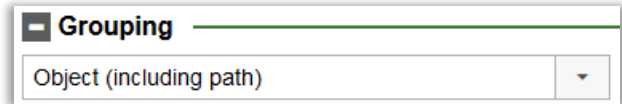
have now added the option *Object (including path)* under *Grouping*.

Select this option to group the report by each individual occurrence of the objects.

Object (including path)	Number of tickets	Number of tickets (percent)
1 Errors / Printers	278	20.6
2 Orders / Printers	219	16.2

New grouping possibilities by Product and Product Group (HD-Track)
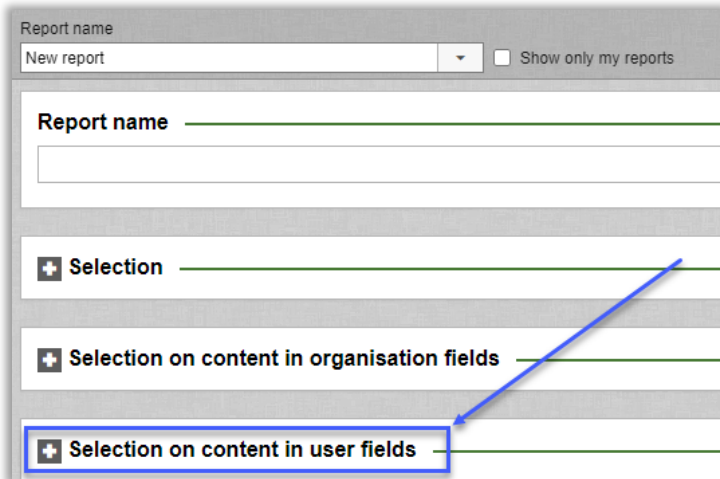
In the reports allowing *Grouping*, there are now new grouping options to group the results by:
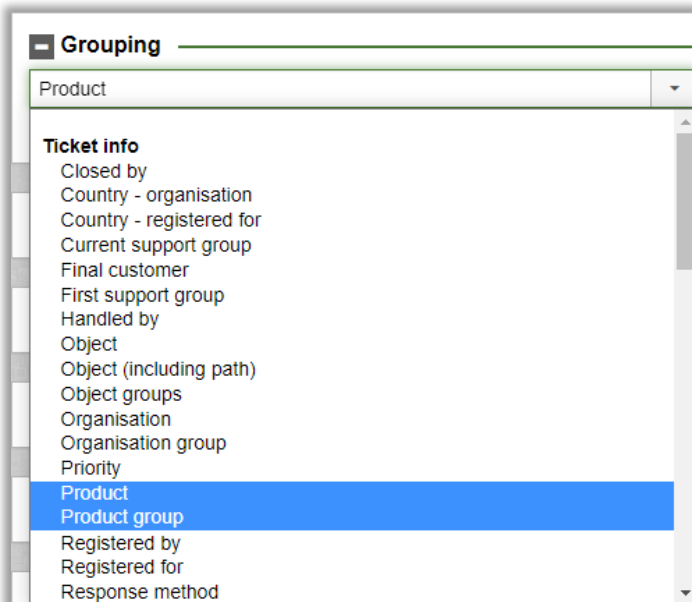
Organisation and User reports

Choose amongst User Fields

In the *Organisation Report*, you could filter amongst the answer options registered in the *Organisation Fields*. You now also have the possibility to filter amongst the answer options provided in the *User Fields*:

The User Fields available are filtered according to the user access of the user logged in. The Administrator has access to all fields, but a Ticket Operator with rights to create reports will be limited according to the settings of each user field.

New Report: User report

This new report was created on the model of the *Organisation report*. The user who will create the report will only see the user and organisation fields they are allowed to see.

Clickable information

The users allowed to create *Organisation reports* and *User reports* will now be able to click – if shown – on the:

- Organisation name
- Username

and launch the display of a pop-up window in which the information can be seen (and modified).

Ticket handling time

First time closed

In the report engine *Ticket handling time*, there is now a new possibility to retrieve handling, by choosing the 'first time closed' setting.

This new setting is available in the section 'Time parameters':

This setting can be used together with the options *Report not based on opening hours* and *Report based on opening hours*.

You will see in the report results, only the time until the ticket was first closed by a support group or user. If the ticket was reopened later, delegated, closed again, … despite how many times this happens, the second or more "closings" will not be taken into account if you have chosen 'until first time closed'.

You can also now choose to display the time in:

Please note, that one day corresponds to 24 hours. This applies regardless of whether the report takes into account opening hours or not.

Ticket list report

Organisation ID in the section Report content

When editing a report from the *Ticket list report*, you can now select that you want to display the *Organisation ID* in the results. It will then also be exported should you choose to export your report to Excel.

Volume report

Two levels of grouping

In the Volume Report, there used to be only one level of grouping. There is now a second one as well, both working together.

Your selections for the First and Second groupings will have to be different. However, it will not be compulsory for you to select a *Second grouping*.

When choosing two groupings, the rendered report will now show two sections:

- One graph and table for the first grouping only
- One graph and table for each item of the first grouping, with sub-results for each item corresponding to the second grouping

New grouping in Volume report: Handled by (at some point)

In the *Volume Report*, you have previously been able to group the report by *Handled by* to see which ticket operators have closed the most tickets. We have now added the grouping *Handled by (at some point)* which includes all operators who have been the ticket's "handled by" user at some point, not just the operator who closed the ticket.

The criterion *Handled by (at some point)* can also be used as a selection in the *Volume report*. Using this selection means that the report will only include tickets which have been handled by the selected users at some point.

At the same time, we have renamed the grouping *Handled by*, which is now called *Handled by (latest)*. It works the same way as before, i.e. it only counts the ticket operator who closed the ticket or is handling it right now (if it still has the status *Opened*).

When using the *Handled by (at some point)* grouping, the percentage is calculated based on the number of unique tickets included in the report. Therefore, the sum of all percentages may be larger than 100%.

Handled by (at some point)	Number of tickets	Percentage of unique tickets
1 Doe, John	640	32.1
2 Doe, Joan	578	29.0
3 Doe, Jane	256	12.8
4 Doe, Joe	219	11.0
5 Other	998	50.1
Number of unique tickets	1994	
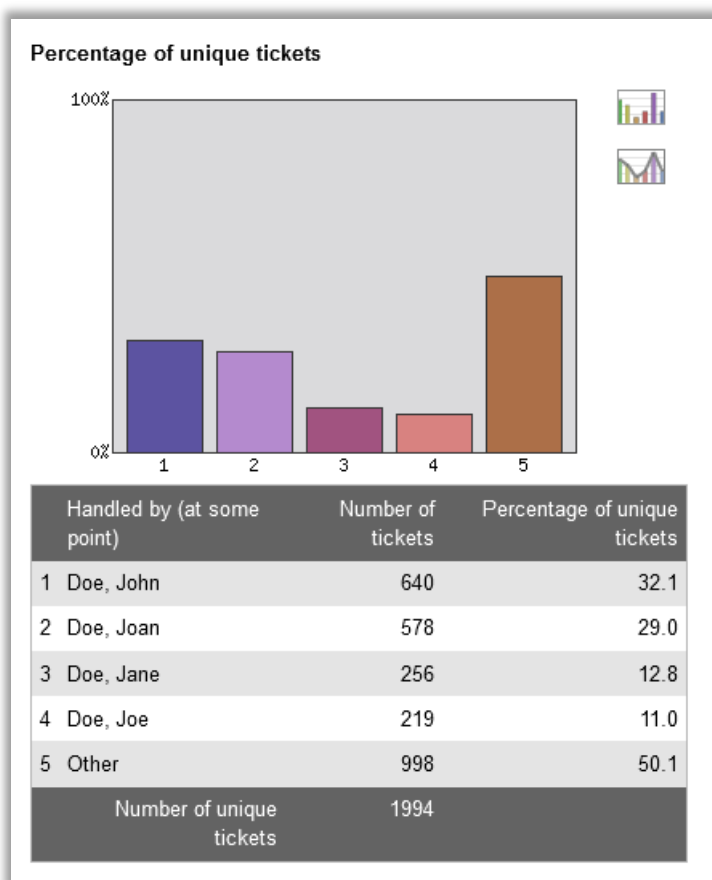
Organisation and user administration

Tickets displayed in the organisation and user details

When handling a ticket under the *Tickets* menu, you can click the linked names of the organisation and user the ticket is registered for to open a popup where the organisation's/user's details are shown. In this popup, the tickets registered for that organisation/user are now always displayed, both in the view where you can edit the information and in the view where you can only see the details.

The tickets registered for an organisation or user are now also displayed in the organisation's/user's details in the *Administration* menu.

The tickets are listed, 20 tickets per page, in descending order by *Registered* date. Click the buttons *Next page* and *Previous page*, respectively, to view the next/previous 20 tickets.

System operators can see all tickets in the list. For ticket operators and phone operators, only the tickets they have the right to see are listed.

Tickets registered for this user		
Registered	**Ticket number**	**Title**
2024-02-28 10:51	20240228:012	Printer problem
2024-02-28 10:34	20240228:017	Installation
2023-11-22 10:39	20231122:019	Server migration

Added search possibilities at organisation change

In the Administration of users: authorized users have access to modify the organisation a user is connected to. To make it easier for you to find the new organisation, we have now added a search possibility on the organisation name. When the list contains many results, only the first ones will be displayed. Refine your search to find the organisation you are looking for.

Move user

Move a user to another organisation.

Note that all tickets linked to this user are also moved, so that they can only be found in the name of the new organisation.

User name: Anna Karlsson (Artologik customer)

Organisation: Artologik customer

Added search possibilities at ticket transfer

In the Administration of users: authorized users have access to transfer the tickets from one user to another user. To make it easier for you to find the user who will get all the tickets, we have now added a search possibility on the name of the user.

Transfer the tickets

From:　Anna Karlsson
　　　　☑ where this user is the 'Registered for' user
　　　　　　　◉ All tickets
　　　　　　　○ Only associated tickets

To:　Svensson, Karl　　　▾
　　　　[　　　　　　　　　] 🔍

+ 8 tickets

View tickets registered within the same organisation

A new setting makes it possible to activate or inactivate a right for support operators belonging to the same support organisation to view or not all of the tickets registered FOR any user within their own support organisation. It will thus be possible for support members to see the child tickets registered for the other support members in the same support organisation and have better control of the overall ticket situation.

The following new setting was created in the menu *Administration > System settings > Advanced > User rights*:

− User rights

Ticket operators

☑ Allow ticket operators to delegate tickets to other operators

○ Allow all ticket operators to delete tickets they can handle
◉ Allow selected ticket operators to delete tickets they can handle

☑ Allow ticket operators to see all tickets
☑ Allow ticket operators in selected support organisations to view all of the tickets registered for all of the users in the same support organisation
☑ Allow ticket operators to see all tickets they have registered

Once the setting is activated, you will at Support Organisation level, have access to yet another setting:

User rights

☑ Allow ticket operators in this organisation to see all tickets registered for all other users in this organisation

The Administrators can, for each Support Organisation, choose to activate or not this setting.

Setting for whether a user can see own or all tickets

In the menu: Administration > System settings > Advanced > User Rights > Customers

When the following setting is activated by the HelpDesk Administrator:

it is now possible for the Organisation Administrator to decide for each user in their own organisation if they shall be allowed to see only own tickets or all tickets in their own organisation. The user profiles will thus look like this for the Organisation Administrator:

Automatic removal/anonymisation of inactive users

The removal/anonymisation features for the tickets have been increased and we have now also added the possibility to automatically remove/anonymise inactive users.

The inactive users who are not connected to any ticket will be removed and the ones connected to tickets will only be anonymised.

You will find the basic settings in the *menu Administration > System Settings > Advanced > General > Automatic removal/anonymisation:*

When a user is anonymised their profile information is replaced by a "-" sign and their username takes a random value such as "1zb4dxp0p5ekkq2be46y", making it possible to reuse the username that used to be attached to that user, for another user. The history of the user is cleared.

The tickets connected to that user are handled according to your choices in the menu *Enable automatic removal/anonymisation of tickets*.

Access rights for phone operators

At *Administration > System settings > Advanced* we have added new access rights, for you to be able to limit what phone operators may access.
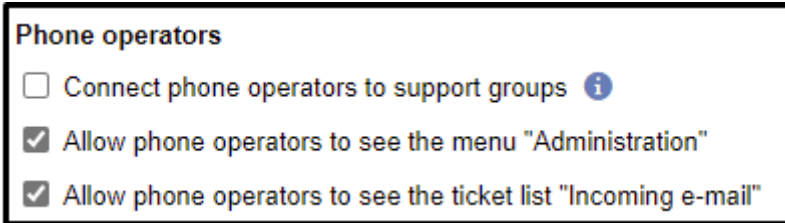
- In plugin *HD-Advanced*: *Connect phone operators to support groups*: By connecting phone operators to support groups, you can limit so that phone operators may only see tickets belonging to the support group(s) they are connected to. Please notice the difference between this new setting and the already existing one:
  "*Selected support personnel can only see organisations connected to the support group(s) to which they belong (is set per user)*
  (Phone operators can be connected to support groups when this setting is active) ".
  This old setting limits the organisations the phone operators may see tickets for, while the new one limits the support groups the phone operators may see tickets for.
- *Allow phone operators to see the menu "Administration"*: If you want to hide the Administration menu for phone operators, you can do this by inactivating this setting.
- *Allow phone operators to see the ticket list "Incoming e-mail"*: Phone operators can by default see and handle new incoming e-mails in the ticket list. By inactivating this setting you can stop the phone operators from seeing this list.

Object administration

Hide inactive objects in the object administration

In HelpDesk, objects that you do not want to use anymore cannot be deleted, but they can be inactivated.

When you go to the *Administration > Object administration > Objects* menu, any inactive objects are now hidden from the start (the option *Active objects* is pre-selected). Select the option *All objects* to view also the inactive objects.

HTML Editor for the Standard Responses

When working with tickets, it can save you loads of time to use "Standard Responses". Those Responses are already written answers created by the Administrators or Ticket Operators with extra rights, that are connected to specific objects and reusable at will by any support member on their tickets. You administrate them from the menu *Administration > Object Administration > Standard responses* and you use them in both the e-mails and the solution section of your tickets.

Until now, the Standard Responses were created in plain text, without any formatting possibility. This has now changed! You have now access to a <u>rich text editor</u>, allowing you to add:

- background colours
- text colours
- tables (with or without colours on the lines, cells, texts…)
- links behind your texts

You can also add tags for information to be automatically added when the Standard Response is used on a ticket:

- Ticket number
- Ticket description
- Solution
- Ticket link
- First name 'registered for'
- Las name 'registered for'
- E-mail 'registered for'
- Phone 'registered for'

The formatting will be visible when you use the Standard Answers in e-mails. When you use them in the Solution area of your tickets, the Standard Responses will be shown in plain text as usual.

Example of a Standard Response made with the new HTML editor:

E-mail administration

Add "all questions and answers" in the e-mail templates

In the menu *Administration > SMS* and *E-mail settings > E-mail templates* you can define the content of the e-mails sent at the registration of each new ticket and at closing of each ticket. In these templates, we have now added the possibility for you to include all ticket form questions that have been answered. Please note that only the questions the 'registered for' user may see will be included.

E-mail accounts – order the information a-z

The list of e-mail accounts is now displayed in alphabetical order and not in order of creation.

Notification for support groups

In the menu *Administration > SMS and E-mail settings > Settings*, you can activate the possibility to define if notifications settings shall be defined at support group and even at group member level :
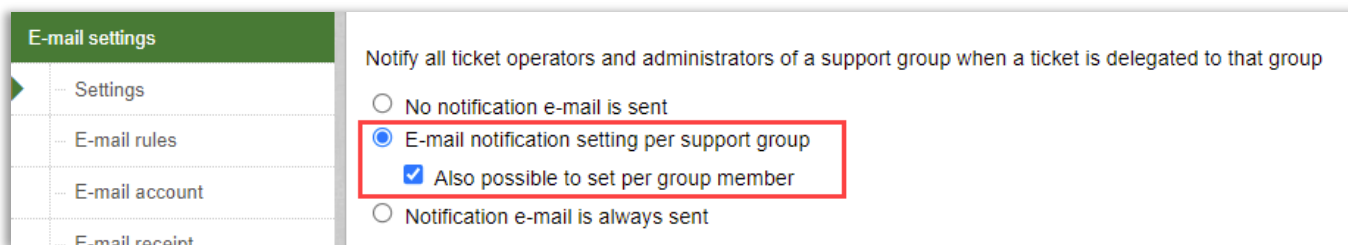
Thereafter, in the menu *Administration > Support Groups > Basic Information, you will be able to select for each support group:*

If you selected that notifications shall be defined at group member level, you will get access on the left of each group member name to a select box. Check it for the user who shall get the notifications:
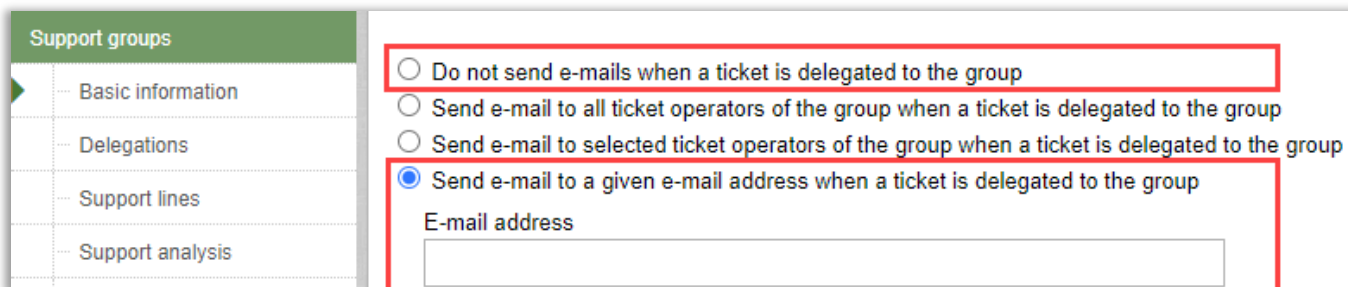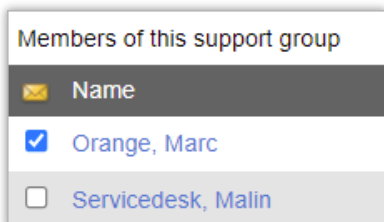

New e-mail template – ticket delegation

In the menu *Administration > SMS and E-mail settings > E-mail templates*, you could until now set up two types of e-mail templates:

- **New Ticket**: an e-mail that can be automatically or manually sent to the person for whom a ticket is registered, and is used as a "Ticket receipt", to confirm that a ticket was correctly registered.

- **Close Ticket**: an e-mail that can be automatically or manually sent to the person whose ticket was closed, informing them of the solution that was given to their request.

We have now added the possibility for the Administrator to also access a template for tickets that are delegated between support members or support groups:

- **Delegate Ticket**

In this new E-mail type template, we have even added the following new tags:

- **E-mail signature**: the signature of the person who actively delegates a single ticket
- **Delegated from**: the first and last names of the person who actively delegates a single ticket
- **Delegated to**: the first and last names of the person a ticket is directly delegated to, OR, the name of the support group the ticket is delegated to.
- **Delegation info**: this tag already contains by default the following information:
    o   Short message regarding who delegated to whom as well as the ticket number
    o   The object used for registering the ticket
    o   A direct link to the ticket

Send notification messages instead of forwarding whole e-mails to your support members

Until now you could use features to forward complete messages that had been sent to your tickets:

You can now choose to send notifications only, and keep all the data from your customers inside of your HelpDesk tickets. You will secure that no private information is sent outside of your support software.

Choose between 'forward' and 'notification'

In the menu *Administration > SMS and E-mail Settings > Settings*: as soon as you choose that e-mails and messages shall be forwarded when received by actual and/or closed tickets, you will now get access to the following two possibilities:

- *Forward the full incoming message*:
    As soon as an e-mail/message is received by a ticket, it will be forwarded exactly as is to the ticket operator in charge of the ticket.

- *Only send en e-mail notification*:
  Only an e-mail notification, and not the exact message received by the ticket, will be sent. You can decide what information shall be part of this notification.

Compose your own notification message

When choosing the option 'Only send an e-mail notification', you get access to a message editor. Click the blue button 'Notification message' and start composing your text. Choose which information to show regarding the ticket itself by selecting amongst the available tags in the editor:

Administration – miscellaneous

Settings for printing and PDF

In the menu *Administration > System settings > Advanced* you will find a new section with settings to define the content that can be printed when printing a ticket to your printer or to PDF.

Automatic removal/anonymisation of data from tickets

For the tickets, you can choose how many months after:

- Registration date
  Or after:
- Closing date

you want them to be:

- Removed: choose the option "TOTAL"
- Anonymised: choose the option "PARTIAL"

When you choose the option "Partial", you get access to further choices, for you to decide which information will be removed/anonymised:

☑ Enable automatic removal/anonymisation of tickets

The removal/anonymisation will start at 02:30 every day. Max. 5000 tickets will be affected per run.

Make it possible to specify per
☑ Object group
☑ Object

Remove/anonymise tickets [24] months [   ] days ⓘ

Counting from the ticket's
○ Registration date
◉ Closing date

Type of removal/anonymisation
○ Total
◉ Partial
   ☑ Ticket title
   ☑ Ticket description
   ☑ Solution
   ☑ Registered for

     Choose a user to move the anonymised tickets to

     Organisation: [▼]

     User: [▼]

   ☑ Other contact persons
   ☑ E-mails and messages
   ☑ SMS
   ☑ Actions
   ☑ Attached file(s)
   ☑ Ticket questions
     ◉ All
     ○ Selected question types

   ☑ Classification questions
     ◉ All
     ○ Selected question types

   ☑ Map markings

- *Extended possibility for choosing how many days after their registration tickets shall be removed/anonymised*

You can in addition to the number of months, also choose the number of days after which the tickets shall be removed or anonymised.

If both months and days are set to 0, tickets will be removed the day after they have been registered.

- *Allow for months and days to be set by object group/object:*

Instead of choosing the time setting for the whole program, you can activate that you want to define the time span per object and/or per object group. When you choose one or both settings, you will see at object group level and/or object level, the following selection:

- *Registered for*
  You can choose to modify the user for whom the ticket was registered, to a specifically selected user profile.
  All of the anonymised tickets will automatically be registered under this chosen user and organisation.

- *Type of removal: Partial*
  When choosing that your tickets shall be anonymised, you get to select which parts will be anonymised. If you check the boxes for ticket questions, classification questions and product questions, you will have the possibility to select among the following two options:
    o   all answers to all question types shall be anonymised
    o   only answers to certain specifically selected question types, shall be anonymised

- *Removal/Anonymisation of the tickets is limited to 5000 tickets at a time*
  This limit was created to help your HelpDesk licence process a limited number of tickets at once. This means that the first time you set the system up, if you have several years of data to be anonymised in your licence, it might take a few days before all tickets matching your settings are processed and removed/anonymised.

Mandatory to answer questions at delegation

Mandatory ticket and map questions (when using HD-Map) are mandatory to answer when creating a new ticket. However, when tickets are automatically created, for example via e-mail rules, not all questions have been answered at registration. By activating this new setting, "Mandatory questions and map questions must be answered before a ticket can be delegated", you force the user first handling the ticket to answer these questions at delegation, otherwise the questions must not be answered until the ticket is saved/closed the next time.

Object and object group in e-mail template for SLA reminder

If you use SLA you can create and define SLA reminder messages to be sent to relevant support personnel (defined at *Administration > SLA administration > Reminders*). Now you can also include the *Object* and the *Object group* of the ticket to be part of the reminder message.

New settings for delegate tickets

Two new settings for delegating of tickets have been added.

- *Use the name of the support group instead of the name of the user for delegation actions and e-mails*
- *Do not create an action when a ticket is delegated*

The first one makes it possible to show the name of the support group instead of the name of the user in the delegation actions and e-mails.

With the second one, it is possible to choose to not create an action when a ticket has been delegated.

New API calls

Get files from tickets

There are 2 new API calls related to the upload of files attached to tickets:

You can access the help here: <HelpDesk-URL>/hd/api.svc/help

Get user's organisation

We have increased the functionalities for the call *GET/v1/{format}/Tickets* to include the organisation (CompID) the user for whom the ticket is registered for belongs to:

You can access the help here: <HelpDesk-URL>/hd/api.svc/help

Administration HD-Advanced

Ticket lists at support group level

In HD-Advanced, it is now possible to create ticket lists at support group level. In this way, all members of the support group will get access to the same ticket lists without having to create them themselves.

In the *Tickets* menu, there will be a heading in the drop-down list for each support group you are a member of and for which at least one ticket list has been created.

The support group ticket lists can be created and edited only from the support group administration. There, you can click the *Add* button under *Ticket lists for this support group* to create a new ticket list for that group. You can also see any ticket lists already

created and click the icons to edit or delete them.

Ticket lists for this support group		
All our not opened tickets	📝	❌
All our opened tickets	📝	❌
		Add
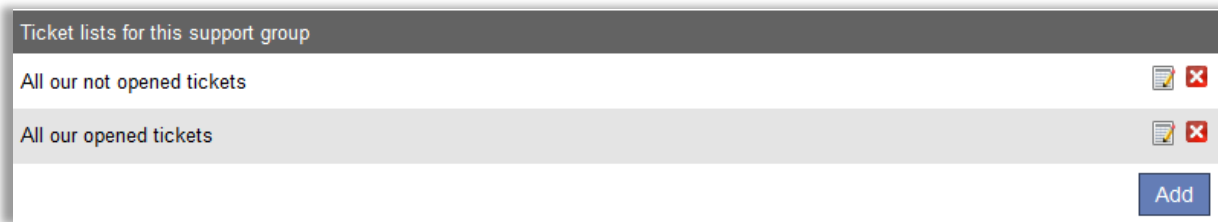
When creating or editing these ticket lists, you have access to the same selections as when you edit the ticket lists under the *Tickets* menu. However, some selection possibilities depend on settings made for the support group:
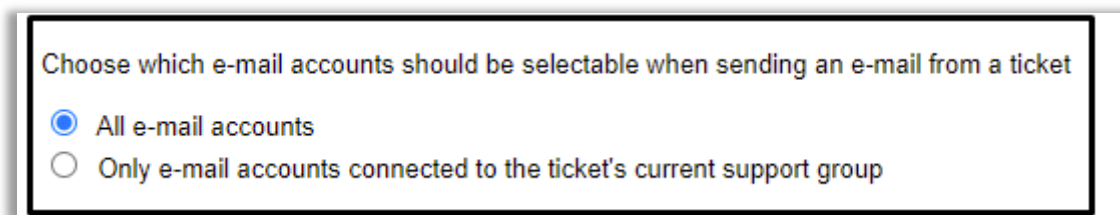
- If the setting *Ticket operators in this support group are allowed to see all organisations* is inactivated, it is only possible to make selections among the organisation groups and organisations which are connected to the support group under *Select the organisation groups which selected ticket operators are allowed to see* and *Select the organisations which selected ticket operators are allowed to see.*
- It is only possible to make selections among object groups connected to the support group under *Select the object groups which are supported by this group*.
- It is only possible to make selections among objects connected to the support group under *Select the objects which are supported by this group*.

Please note that ticket lists created for a support group only show tickets handled by that support group.

E-mail account for selected support groups

When working with support groups, you can select to connect e-mail accounts to the support groups, to let the support group members see only incoming messages sent to these accounts at *Incoming e-mails*.

Now you can select if the e-mails sent from a ticket can be sent from all defined e-mail accounts, or only the ones connected to the support group of the ticket.

Choose which e-mail accounts should be selectable when sending an e-mail from a ticket

◉ All e-mail accounts
○ Only e-mail accounts connected to the ticket's current support group

The setting is available at *Administration > SMS and E-mail settings > Settings*.

## Allow ticket operators to administer classification questions

With HD-Advanced, you now have the possibility to allow the ticket operators of your choice to administer classification questions. You add this right in the user profile of each ticket operator.

Scheduled ticket creation

At Administration > Object administration > Standard tickets, it is now possible to decide if a specific standard ticket can be used for scheduled ticket creation, i.e. that new tickets, based on a standard ticket, can be automatically created. This can be useful if

you have tasks that shall be performed every week or month.

After the setting above has been chosen for at least one standard ticket, the new menu option *Scheduled tickets* will be available.
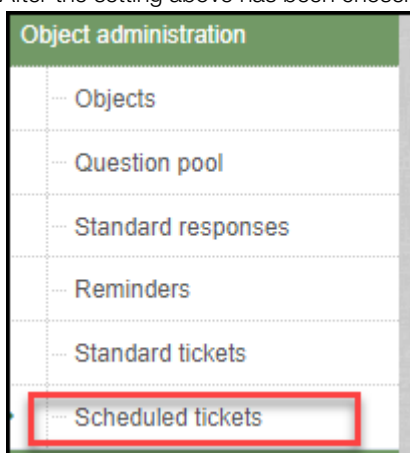

Here you can define:

- Which user the automatically created tickets shall be registered for
- The support group that shall be set for the tickets
- The time interval for the automatic creation. For example, a new ticket can be created:
    o every day
    o every second Monday
    o the first day of every month
- The start date and possibly also an end date of the automatic creation of tickets

Standard ticket available/unavailable for customers

At Administration > Object administration > Standard tickets you can now decide per standard ticket if it shall be selectable for customers as registration or not. Even if the standard ticket is not possible to select for customer users at registration of a new ticket, it is available for support users.

## Connection between support groups and standard answers

With a new setting at System settings > General > Functions "Make it possible to link support groups with standard answers" it is now possible to connect a specific standard answer to all support groups or only some of them.
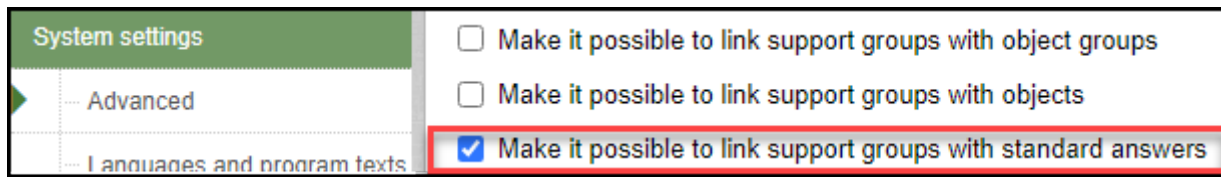
This connection can be made from the administration of standard answers or the administration of support groups.

To connect one support group to all standard answers, you choose all in the left area and move it to the right area and save.
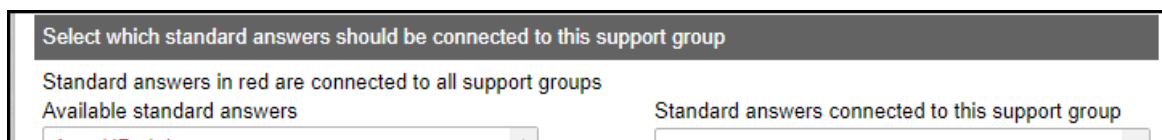
To be able to easily see which standard answers are connected to all support groups, they are visible in red colour under the administration of support groups.

HD-Map

Tickets presented in a map view

HD-Map is a plugin to Artologik HelpDesk with which you can mark a certain place or area on a map, to specify the location connected to a ticket.

For your ticket lists, at the menu Tickets, you can select to present the tickets in a list, as before, or to present the tickets in a "map view".
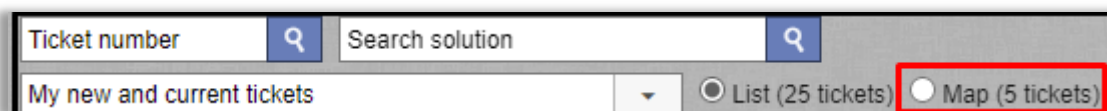
The number of tickets might differ if not all tickets in the list have a map location selected.

Custom map marker per priority

In the administration of priorities, under *Administration > Application settings > Priorities*, you can now for each priority select a custom marker with a colour of your choice. Each ticket will be displayed on the map with a marker matching its priority.

Enhanced search

When working inside a ticket with a map location, you can now access a much more advanced search function, for searching for tickets already registered inside HelpDesk.

You can filter by:

- ticket 'status'
- object that the ticket was registered on, or all objects available in your licence

Map settings

If the plugin *HD-Map* is activated, a new setting, *API key for Google Maps*, at *Administration > System settings > Advanced* will be available.

Once you added the API key for Google Maps, you can choose if you want the map to be included in the pdf created for a ticket.

Map settings

API key for Google Maps (The owner of the licence is responsible for any costs and legal issues connected to the use of the Google API)

| ********************************-UO8 | ❌ |

☑ Show the map in the ticket PDF (Requires that Maps Static is activated for the given API key)

Open the map in the mobile's map app

When working with a ticket on a mobile device, you can click the button *Directions* to open the map in the mobile's map app to get driving directions.
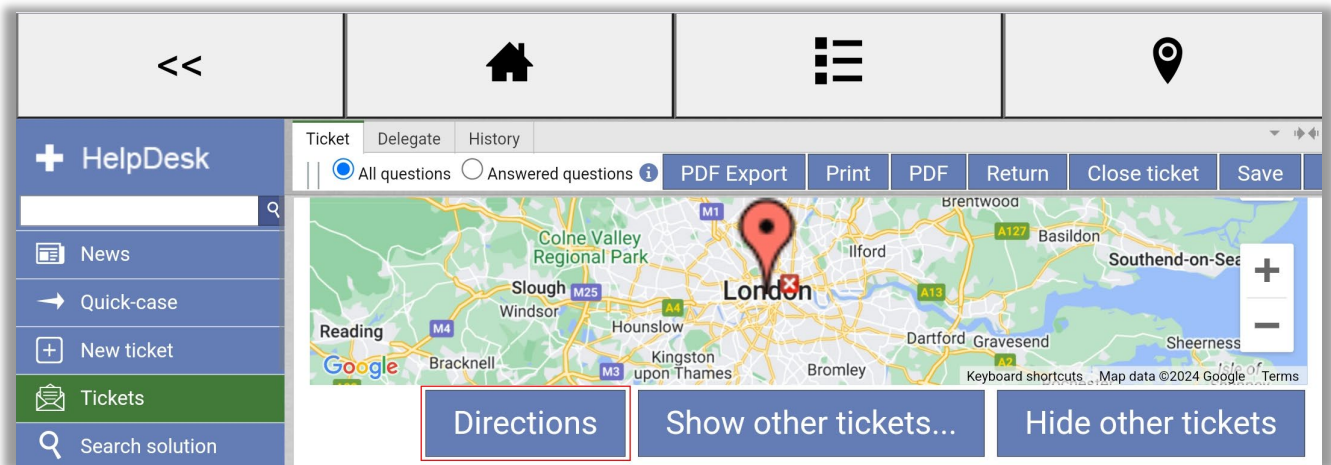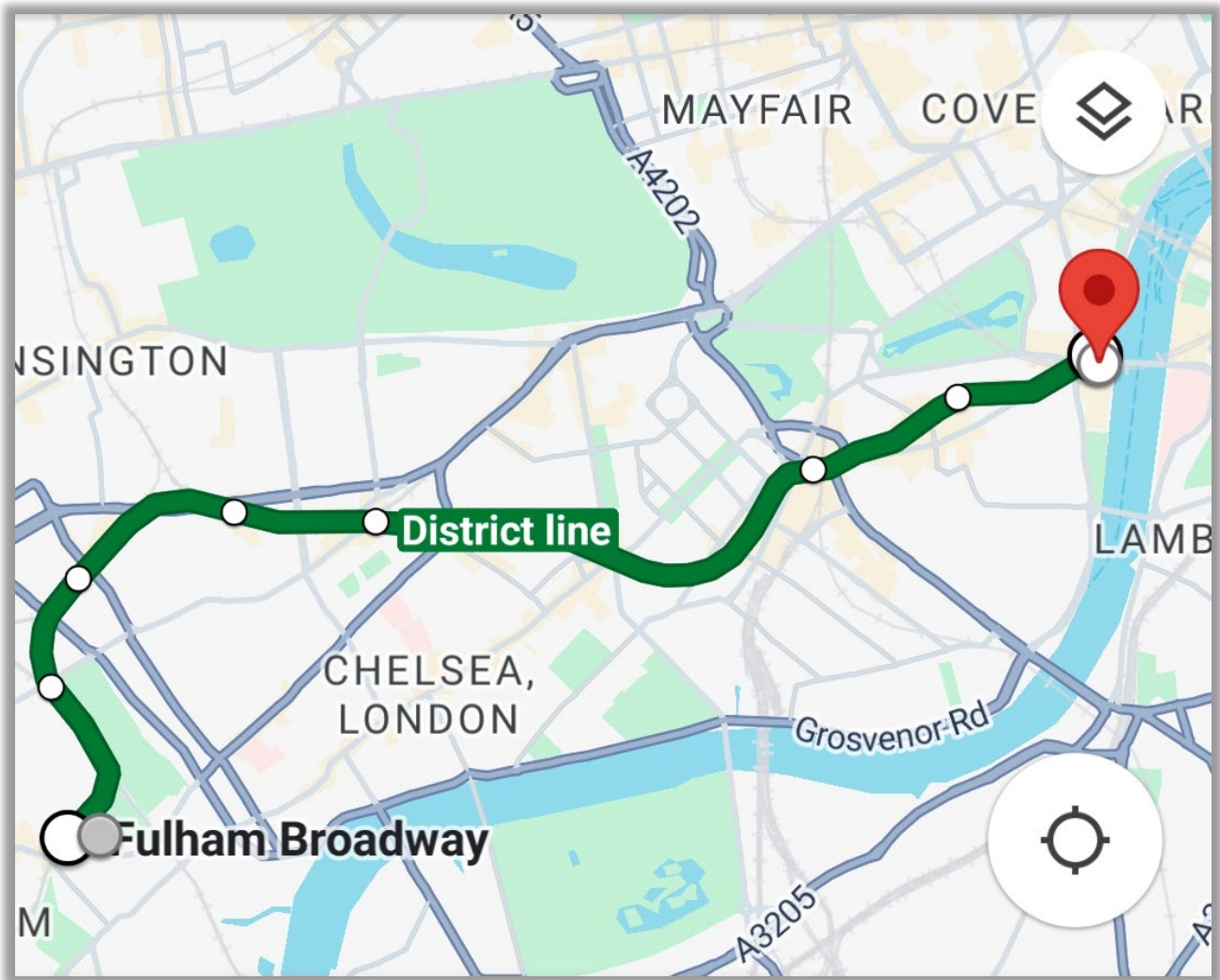
Information when copying a ticket

The ticket operator working on a ticket has the possibility to copy that ticket and create a brand new ticket out of it. The sections of the original ticket that can be copied are chosen by the Administrator in the menu Administration > System settings > Advanced > General > Register ticket.

We have now added the possibility to copy the place that was marked on the map in the original ticket, to that list!

Show ticket list in a map view on mobile devices

We have added a button for showing the ticket list in a map view when working on mobile devices.

<<	🏠	☰	📍

New plugin: HD-SMS

With the new plugin HD-SMS, it is possible to send messages via SMS, provided that an SMS gateway has been configured in the system under *Administration > SMS and E-mail settings > SMS account*. An SMS gateway from an external service provider is used to send SMS messages. You can choose to rent the service via Artisan or sign your own agreement with a supplier. Contact Artisan for pricing and information on which SMS gateways are possible to use in the system. If desired, Artisan can adapt the program to enable connection to more SMS gateways.

New plugin: HD-Forms

With our new plugin HD-Forms, you can build web forms that automatically generate tickets in your HelpDesk. You can build your web forms as public e-services where login is not required. You can also create web forms for e-services that require login as a HelpDesk user or via BankID. For these non-public forms, you can choose whether they should require signing, signing and co-signing, or only co-signing.

By using HD-Forms, you can provide customised e-services on websites, intranets, or "My Pages" in HelpDesk. The solution is the perfect complement for contact centres and support teams as you can allow customers, employees and citizens to register requests themselves. Add the plugin to your HelpDesk solution to offer an alternative contact route to your support.