Manual

Artologik®

HD-LDAP, HD-Track
HD-Advanced, HD-TIME
HD-Asset

Plug-ins for HelpDesk version 3.4

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Artologik® HelpDesk

Would you like to give your support department greater opportunities to build positive customer relations? Artologik is a toolbox for both web sites and intranets. The programs in the Artologik series are web-based. They offer advanced functionality, but are still very easy to use. With Artologik, you are able to create interactivity on the web without having specialist knowledge of the technology.

Artologik® HelpDesk offers a simple way of handling support tickets. Using this support system you can take advantage of and use the knowledge you have gathered within your organisation. The handling of support tickets will become easier since questions and solutions are gathered and organised in a knowledge database. Both your customers and your support staff can search among previous tickets to find the answer to a question. This means that the knowledge gained from previous solutions can be reused and applied to new problems.
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Plug-in functionality

To make it possible to adapt the program to the specific needs of your company we have developed additional functions. These functions are built as plug-ins and can be activated with the development of your company’s needs. When you order the required plug-in from Artisan Global Software, you will get a registration key, which you install and the plug-in is ready for use. The add-on functions described below are LDAP-connection (HD-LDAP), Product handling (HD-Track), Advanced ticket handling, (HD-Advanced), the HelpDesk/TIME-connection HD-TIME, and the inventory tracking program HD-Asset.

HD-LDAP - LDAP-connection

General information

The LDAP connection offers a way to link your Artologik product to an external LDAP server to facilitate administration, handling and validation of users.

The LDAP connection uses Active Directory’s LDAP – API. Users with Windows NT 4 must install the program dsclient.exe. This program can be downloaded from http://www.microsoft.com

Every time the user logs in to an Artologik program, the program retrieves his/her login data and updates the data available in Artologik.

For detailed information on configuring the LDAP link, see the separate manual.

Administration

User Import

Once you have selected an organisation under Administration > Organisations you will find the button Import users. This is where you import users from your LDAP-registry.

1. Go to Administration > Organisations, search for an organisation and select it.
2. Click the “Import users” button.
3. A new page will open. Click on the link “Import of users from LDAP”
4. A pop-up window will open where you are able to do your search
5. Choose directory. If you tick the box “Recursive” users in the subdirectories will also be imported.
6. Enter the desired search criteria in the search fields. When the LDAP connection is configured it is determined which search fields should be available. If no search fields are entered, all users matching your other search criteria will be included in the import.
7. Select if you want to import all users or only new users.
8. Click “Import users” to view a list of the matching users.
9. Select the users you want to import, or select All.

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10. Select what or which program you want to import the users to.
11. Select the language that the selected users should be assigned to and to which organisation they should be imported.
12. Click “Import”. The matching users will now be retrieved and a status message of the result of the import will be displayed.
HD-Track - Product handling

General information

Product handling is a more advanced way of using Artologik HelpDesk. By setting up a product directory, which you then link to registered tickets, it will be easier to establish what factors cause the most problems within an organisation and generates the most support.

Search Solution

Advanced Search

Under the menu Search Solution > Advanced Search a selection can also be made for Product, Product Group and Serial Number when you make your search.

Organisation

In Administration > Product Administration > Product settings, if you made the setting "Can be linked to organisations", a button called "Product handling" will be displayed in Administration > Organisations, at the top and at the bottom of the information page of each registered organisation in the system. When you click this button you can link specific products to the selected organisation.

1. In Administration > Organisations, you select the Organisation to which you want to connect a product. Click the button "Product handling".
2. A pop-up window is displayed. Select : Product group, Product number and Serial number, if any. Click the button "Add product link". The product will be displayed in the list below. The field "Serial number" appears only if you select a product for which the setting "Specify the serial number when a ticket is created" has been activated.
3. Click on the product number to view further information about the product.

Users

In Administration > Product Administration > Product settings, if you made the setting "Can be linked to users", a button called "Product handling" will be displayed in Administration > Organisations, at the top and at the bottom of the information page of each registered user in the system. When you click this button you can link specific products to the selected user.

1. In Administration > Organisations, you select the user to which you want to connect a product. Click the button "Product handling".
2. A pop-up window is displayed. Select : Product group, Product number and Serial number, if any. Click the button "Add product link". The product will be displayed in the list below. The field "Serial number" appears only if you select a product for which the setting "Specify the serial number when a ticket is created" has been activated.
3. Click on the product number to view further information about the product.
product.

A ticket operator can be given the right to administer products by ticking the box "Can administrate articles" in his/her user information. This means that the ticket operator get access to the menu Administration > Product administration.

Objects

In Administration > Product Administration > Product settings, if you made the setting "Can be linked to objects", a button called "Product handling" will be displayed in Administration > Object administration > Objects, at the top and at the bottom of the information page of each object in the system. When you click this button you can link specific products to the selected object.

1. In Administration > Object administration > Objects, you select the object to which you want to connect a product. Click the button "Product handling".
2. A pop-up window is displayed. Select: Product group, Product number and Serial number, if any. Click the button "Add product link". The product will be displayed in the list below. The field "Serial number" appears only if you select a product for which the setting "Specify the serial number when a ticket is created" has been activated.
3. Click on the product number to view further information about the product.

Product administration

Products

1. Make your selection from existing product groups, or enter the name or part of the name of the product name/number in the text field, then click search. A list of matching products within your selected product group will be displayed.
2. Click on the product you want to view, edit it and click "Save".
3. You can also add a new product. Indicate which product group the new product should belong to, its product code, if it should be possible to state its serial number when it is linked to a ticket, as well as the name of the product.
4. A product can only be deleted if it is not linked to any tickets.

Create a link

In order to create a link to the product you have registered, click "Product links".

1. Select what category you would like to link the product to: either object, OR organisation, OR user. The setting for what a product can be linked to is made under Product administration > Settings. The selection list "Link to" will only appear if more than one alternative is possible.
2. Once this selection is made, indicate to which object in particular (or organisation/user) you want to link the product.
3. Select a product group.
4. Select the product for which you want to create a link and indicate (optional) a serial number.
5. Click "Add product link".
6. The list on this page displays all existing links. You can also delete existing links by clicking the icon with the red x next to the product information.
Edit product
By clicking the product number link you can edit the selected product. Edit the information and save.

Product groups
Go to the selection list at the top of the page and select one of the existing product groups or "New product group". If you select an existing product group, a description of the group is displayed in the language fields. If you are going to create a new product group, you will have to enter the descriptions you want to use.

Fill in the language fields for the languages you will use in the program.

Show products
When you click "Show products" a popup window will be displayed with all products in the selected product group. If you want to see more information about the product, click on the selected product.

Product settings
To ensure proper functioning of the product linking, you must indicate how you want to link the products to the tickets. We recommend that you only use one method of linking, since it might cause confusion if you link products in several different ways.

1. Link to object: Products can be linked to objects.
2. Link to organisations: Products can be linked to registered organisations.
3. Link to users: Products can be linked to individual, registered users.
4. If you indicate that the products use serial numbers, you can state a serial number for each link.

Indicate if it should only be possible to link products that are already linked to an object, organisation or user to tickets, or if you should be able to link all products to tickets. Maybe you do not want to make it possible to link all products in the product directory to tickets.
Indicate if you only want one product to be linked to each ticket.

Field definitions
Here you determine what information should be registered for each product. The fields you create here are fields that are filled in under Products in the Product administration and that are displayed about the product in pop-up windows.

There are four fixed product fields, which can not be edited. There are: Product group, Indicate serial number when registering a ticket, Product code and Name.
You can add up to twenty optional text fields for product information.
1. Select the desired number of fields from the list and click "Save".
2. Enter the name of the field in the different languages and click "Save".
If you want to be able to import products through an XML interface, this is where you indicate the names of the XML tags that exist in the XML file next to "Name (XML name)". You do not have to use these fields if you do not intend to import products through the XML interface. Although, in the field "Description (XML name)" all the languages must be filled in.

XML import
If your company already created a product list you can choose to import it to HelpDesk instead of adding all the products manually. The product list is imported via an XML file. The XML file should contain the element names that are indicated under "Administration > Product administration > Field definitions", that is "Description (XML name)". The products you import will be registered in the product directory if they do not already exist there. If the product is already registered it will be updated with the new information. The product group will also be registered or updated. There are two ways of importing your product list:

Through a web interface:
1. Specify the URL of the web service that will deliver the XML file, including the required parameters.
2. Specify user ID and password that are valid for the server called.
3. Click on “Start import”.

Through an existing XML file:
1. Click Browse. Select the file and click “Start import”.

Links
Product links can be set up from many different places in HelpDesk. In Product administration, Organisation administration, User administration or in Object administration. Where in the program you are able to set up links to your products depends on your settings in Products>Settings.

Ticket handling
Ticket Registration

The button "Link product to ticket" will now be displayed in the ticket form upon registration of the ticket.

1. Specify your product selection. The alternatives you are able to choose from depends on your settings in Administration > Product administration > Settings. You can choose to link the products to either the object, organisation or to user/s. The selection list “Product selection” will only appear if more than one alternative is possible.
2.
3. Select product group.
4. Select product.
5. Specify serial number (optional) for the product and click "Add". The field “Serial number” appears only if you select a product for which the setting “Specify the serial number when a ticket is created” has been activated.
The linked product is now displayed in the ticket. The presented information is product code, product name and serial number. You are also able to remove the products you have linked to a ticket by clicking the icon with the red x on the ticket page.

Reports

Product group, product and serial number has the same function in the report section as other selection criteria.

In the reports that can be displayed grouped, i.e. “Ticket handling time”, “Ticket volume” and “SLA report” (the latter is only available in HD-Advanced), it is possible to group reports “Per product group” or “Per product”. However, this is possible only if the setting “Only one product can be linked for each ticket” has been activated under “Product administration > Settings.

In the report “Ticket list” there are the variables “Product” and “Product group”.
HD-Advanced – Advanced ticket handling

General information
Advanced ticket handling is a more advanced way of designing your HelpDesk. By classifying your customer organisations into different organisation groups, the support staff into support groups and the objects into object groups, you can establish a more structured way of working. You will be able to offer your customers better service and reduce the workload on your HelpDesk organisation.

Other functions included in HD-Advanced are:
- Standard tickets – create new tickets based on a template
- Classification – give the tickets a grouping to use for statistical purposes
- Associated tickets – handle tickets caused by the same problem
- Final customers – customer organisations linked to another customer organisation, such as a reseller
- SLA – handle Service Level Agreements and create reports showing if the agreements are fulfilled

The functions included in HD-Advanced are also described in the main manual of HelpDesk.

Search Solution
You can base your selection on Object group or Classification if these are used in the system.

New Ticket
In HD-Advanced you first select the object group (if the administrator has chosen to activate the use of object groups) and then the object.

If final customers are used in the system, the selection list “Final customer” is displayed. Select a final customer if you want to register the ticket for this organisation. If you have the right to create organisations, you also have the right to create a new final customer organisation by clicking the button “New final customer”.

If in the selection list “Standard ticket” there is an option matching your ticket, you can choose this. The administrator chooses whether standard tickets should be used in the system.

Classification
If classification is used in the system, you can classify the ticket by answering the classification questions.

Show Ticket Statistics
In this submenu, on the right-hand side of the page, under the main menus New Ticket and Tickets, you can view statistics of the number of tickets of each organisation and the number of tickets of each support group and ticket operator or administrator.

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The displayed statistics come in the following order: per support group, per organisation and per operator.

For all support groups you can view the number of New, Delegated, Open, Closed and Withdrawn tickets, as well as the Total number of these.

For all organisations you can view the number of New, Delegated, Open, Closed and Withdrawn tickets, as well as the Total number of these.

For all operators you can view the number of Open and Closed tickets, as well as the Total number of these.

**Tickets**

**Ticket List**
If SLAs are used it is possible to choose to display the heading “SLA deadline”. By sorting the ticket list by SLA deadline you can see in which order the ticket list should be addressed in regard to deadlines. If you hover the cursor over a deadline you can see which stage of the ticket handling process the deadline concerns, whether handle ticket, answer ticket or close ticket.

**Delegate Ticket**
You can delegate the ticket to support groups to which your own support group can delegate, providing the group gives support on the object of the ticket.

**SLA**
This heading is displayed if SLAs (Service Level Agreements) are used. At the top you enter when and how the customer was contacted. The time entered here is the time matched against the SLA “Give answer to ticket”. To set when the first customer contact took place, you chose a contact method in the selection list, and then date and time in the selection lists displayed. If you e-mail the customer from the ticket before you have entered the “First customer contact”, the contact method will automatically be set to e-mail and the time to when the e-mail was sent.

The name of the valid SLA is displayed below this. Click the name for information on the SLA and its service level.

The service levels for the ticket in question are listed under the heading “Service level”. There you can also see the SLA deadlines concerning the ticket; that is, when the different stages should be completed to meet the SLA requirements. The time when a stage is completed is displayed under the heading “Ticket date”. A green check mark by the date indicates that the stage was completed within the SLA deadline, while a red line indicates that the SLA deadline was not met.

**Associated Tickets**
Sometimes several tickets are caused by the same problem. For example, if a server goes down, many tickets can be registered about problems on the
network. In these cases it is appropriate to connect tickets so that you have one primary ticket and a number of tickets associated to it. The benefit of this is that when the primary ticket is closed, the solution is automatically entered on all of the associated tickets and these are closed as well. When you close the primary ticket, you can also choose to automatically send e-mail messages to the users for whom the associated tickets were registered to inform them of the solution.

Under the heading “Associated ticket(s)” you find the selection list “Primary ticket” and the button “Associate ticket(s)”. The connection can be made in two ways.

1. Open the ticket which should be an associated ticket and select a primary ticket which it should be connected to in the selection list “Primary ticket”. Click “Save” to make the connection.

2. Open the ticket which should be the primary ticket and click the button “Associate ticket(s)”. A list is displayed of all tickets which are new or open. Mark the tickets which should be associated tickets. You can also search for tickets by entering text in the field “Search text” and clicking “Search”. Mark the check box “Take over all associated tickets, if possible” if you automatically want to take all associated tickets whose object you give support on.

On the primary ticket, associated tickets are listed with their ticket number, the ticket title and three icons. Click the red line to remove the connection, the icon in the middle to display the associated ticket in a new window, and the arrow icon to the right to go to the ticket.

The icons “Show” and “Go to the ticket” are also available on the associated ticket, next to the selection list “Primary ticket”.

Only the operator in charge of the ticket can edit the connections. If another operator displays the ticket without taking it, they can see information about the connections. If an associated ticket is added, the information is displayed in the ticket heading against the heading “Primary ticket”, while on the ticket form of the primary ticket it is shown under the heading “Associated ticket”.

In the ticket list, the primary ticket has a plus symbol on the left side, while associated tickets have a minus symbol. If you hover the cursor over the minus symbol, you will see the primary ticket's ticket number. You can also decide if associated tickets should be visible in the ticket list, see the section “Edit ticket lists”.

Note:
If you have an associated ticket with a temporary object, and you close the primary ticket without changing the associated ticket's object, the associated ticket will automatically be assigned the object of the primary ticket.

Organisations
Select the organisation group, the first support group and the default object group. Read more about first support groups in the section Link support groups.
If you are creating a final customer organisation you need to choose to which customer organisation the final customer is connected.

If SLAs (Service Level Agreements) are used and the setting for connecting SLAs to organisations has been made, the button “SLA” that you click to connect an SLA to the organisation will be visible. In the organisation details against the SLA heading, the name of the valid SLA is displayed. Click the name for information about the SLA and its levels of service.

If the setting has been made to connect SLAs to organisations’ objects or organisations’ object groups you can, when clicking the button “SLA”, connect different SLAs to the different objects or object groups of the organisation. Against the heading “SLA” in the organisation details form you will instead see the link “Show links” which you click to see information about which SLAs are connected to the organisation’s object or object groups.

For more information about how to make these connections, see the section “SLA Administration”.

Users

Specify to which of the available support groups the HelpDesk user should belong by marking one or several support groups in “Available Support groups”. Transfer them to “Members of..” with the arrow buttons and click Save.

Organisation Groups

Basic Information

1. Make your selection from the list of available organisation groups at the top of the page. You can also to add a new organisation group.

2. If you select an existing organisation group the information on that group will be displayed. All organisations belonging to this group will also be listed.

3. Select the support group which you want to be the first support group. Read more about the term “First support group” in the section “Link support groups”.

4. You can assign objects to the object group. All organisations in the organisation group will then get support on those objects. There is also the possibility to set an object and an object group to be default when registering a ticket, if this has not been set on organisational level.

5. If the setting “Use organisation group colours” is activated under “Other settings” > “Colours”, you can choose in which colour tickets from the chosen organisation group should be displayed in the ticket list. Against the heading “Colour in the ticket list” you see a
preview of the selected colour. You also have the button “Select colour” which you click to select another colour. Close the palette using the cross and save.

6. If you opt to add a new organisation group you enter the name of the group, what support group it will belong to and Save.

7. If you click on the name of an organisation a new window will open with information on the organisation and all support objects for the organisation.

8. If SLAs (Service Level Agreements) are used in HD-Advanced and the setting for connecting SLAs to organisation groups has been made, the button “SLA” which you click to connect an SLA to the organisation group is visible. In the organisation group details against the heading SLA, the name of the valid SLA is displayed. Click the name for information about the SLA and its levels of service.

If the setting has been made to connect SLAs to organisation groups’ objects or organisation groups’ object groups you can, when clicking the button “SLA”, connect different SLAs to the different objects or object groups of the organisation group. Against the heading “SLA” in the organisation group details you will instead see the link “Show links” that you click to see information about which SLAs are connected to the organisation group’s object or object groups.

For more information about how to make these connections, see the section “SLA Administration”.

Support Lines
This menu option displays the structure used to delegate HelpDesk tickets to underlying support groups for a selected organisation group. If you move the cursor over a support group you can see which of your staff members are included in this support group. Support groups in red have not been allocated support staff.

Support Analysis
The support analysis page displays all objects for which a customer organisation of a particular organisation group has support agreements. Select the organisation group from the selection list. Preceding support groups can delegate tickets to subsequent support groups. If you move the cursor over a support group you can see which of your staff members are included in this support group. Support groups in red have not been allocated support staff.

Support Groups
All basic information for advanced ticket handling is available in “Support groups”.
Basic Information

1. Make your selection from the list of available support groups at the top of the page. You are also able to add a new support group.

2. A list of all members of the particular support group will be displayed. You are able to add users in the support group by clicking "Add members". Select users and save.

3. You can delete members from the support group by clicking the icon with the red x next to the name.

4. You can edit the text of a support group by making your changes and clicking Save.

5. By clicking the name of a member in the list of members for this support group you will display information on the user, objects the user receives support for, objects the user provides support for and the support groups the user is a member of.

6. In the selection list “Standard e-mail account” you choose which e-mail account should be the default when a member in the support group sends e-mails. For each message sent, the users can however choose which account should be used as sender for that e-mail.

7. Set which e-mail account(s) should be connected to the support group. Under “Incoming e-mails” the members of the support group will only see new messages sent to these accounts. They will however be able to see all messages sent to their open tickets, regardless of which account the message was sent to. A reason for using several accounts in the system can be so that new messages end up at different support groups depending on which address they were sent to.

8. You can set which object groups and objects the support group should provide support for. The members of the support group will then automatically get the right to give support on these object groups and objects. In addition to this, you can assign each member additional objects.

9. If you select “New support group” you will be asked to name the new group. Click Save.

10. You are able to delete a support group providing there are no tickets or organisation groups linked to that support group.

Delegations
The support staff is divided into support groups. Each support group supports selected objects and will only be able to view tickets connected to the objects they support.

1. Make your selection from the list of available support groups at the top of the page. You are also able to add a new support group.
2. Specify what other support groups the selected support group should be able to delegate tickets to by clicking on the available support groups in the left hand box ("Available support groups") and moving them to the right hand box ("Selected support groups").

3. Specify what other support groups should be able to delegate tickets to the selected support group by clicking on the available support groups in the left hand box ("Available support groups") and moving them to the right hand box ("Selected support groups").

4. If you select "New support group" you enter a name of the group and click "Save".

Support Lines
This menu option displays the structure of the support groups and the delegation order between them. Make your selection from the list of available support groups at the top of the page. Support groups in the left hand column have not been delegated any tickets or are not linked to an organisation group. By moving the cursor over a support group you can see which of your staff members are included in this support group. Support groups in red have not been allocated support staff.

There are also selection lists where you can choose to display the support lines to the different organisation groups and object groups.

Support Analysis
The support analysis page displays all objects and the support groups giving support on them. Preceding support groups can delegate tickets to subsequent support groups. If you move the cursor over a support group you can see which of your staff members are included in this support group. Support groups in red have not been allocated support staff.

If you select a certain organisation group or object group in the selection lists, only the objects for which the organisation group receives support or which are part of the object group will be displayed.

Reminders
You are also able to send a reminder for tickets concerning a selected object at support group level. The reminder function you set up will work the same way as the reminder function under "Object administration". The function is added here to simplify administration.

Link Support Groups
The thing that decides which support group handles a ticket when it is registered is what is stated in the ticket list "First support group". This list can be found in four different places in the program: under "Objects", "Object group", "Organisations" and "Organisation groups". To make the selection list available under "Objects" and "Object group", the settings "Make it possible to link support groups with objects" and "Make it possible
to link support groups with object groups must be activated under “Other settings” > “Advanced”.

The program selects how the first support group is allocated in the following order:

1. Object
2. Object group
3. Organisation
4. Organisation group

If first support group has not been entered on level 1, the support group entered on level 2 is used and so on. On level 1-3, you can skip entering the first support group, but a support group always has to be entered on the organisation group level.

Example:
Your customer organisations are divided into two organisation groups, Customers and Employees.

You want all tickets from customers to be dealt with by the support group “First line external”, so you will set this as the first support group on the organisation group “Customers”. You need not enter any first support group on the objects and object groups for which external customers receive support, nor on the particular organisations in the organisation group. Since the first support group has not been set for the object, the object group or the organisation, the support group referred to will be the one set on the organisation group.

Example 2:
You want tickets from your employees to go to one of the support groups “Property” or “IT”. You have one object group for queries concerning property and for which you will set the support group “Property” as the first support group, while on the object group for IT queries you set that the support group “IT” should be first support group. On objects employees receive support on, you do not set any first support group. Since the first support group has not been set at object level, the support group set at object group level is the one used. Object administration

Object
A new button, “Support lines” is displayed in Object administration > Object. The new pop-up window displays the support situation of the selected object.

If object groups are used, you select which object group(s) the object should belong to.

In HD-Advanced, you can set which support groups should give support on the object. This is a way of quickly assigning an object to all members of a support group.

You also have the possibility to set which group should be the object’s first support group. Read more about this in the section “Connect support groups”.

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If SLA (Support Level Agreement) is used and the setting has been made to link SLA to object, the button “SLA” which you click to link an SLA to the object is displayed. Among the object's details you will also find the heading “SLA” with the name of the valid SLA. Click the name to display information about the SLA and it's levels of service. For more information about the links, see the section "SLA Administration".

Add Questions
If questions have been added to the object's object group, these will be added at the bottom. They can not be edited here so you can only see information on the order in which they will be displayed and whether they are mandatory. In the ticket form, questions added to the object group will be displayed before the object's questions.

Object Groups
Object groups are used to sort objects into groups. The advantage with this is that it will be easier to find the right object when registering a ticket. You can also connect support groups, priorities and questions to the object group, and then also to all objects in the group.

When you choose “Object group” in the right hand menu, the alternative “List all” is chosen in the top selection list. Then all object lists you have created will be listed and you have the possibility to decide in which order they should be presented in the various selection lists in the program where the object groups are displayed.

In order to list the object groups in a certain order, mark the alternative "Use this List". Then, under the heading Order, enter the number for each object according to the place it should take in the list.

Create and Edit Object Groups
1. Use the selection list at the top of the page to select an existing object group or "New object group". If you select an existing object group the name of this object is displayed in the fields against the languages used in the program. If, instead, you select to create a "New object group" you will need to give the object group a name in all languages used in the program.

2. Select which objects should be included in the object group and which object should be default when a new ticket is registered for the object group.

3. If the setting “Priorities must be connected on object level” has been activated under Other settings > Priorities, you can enter which priorities should be connected to the object group. Mark the priorities you want in the field “Available priorities” and then transfer them across to the field “Object group’s priorities” with the arrow button. Then select which priorities should be default when creating a new ticket in the selection list “Default priority”.

4. You can set which support groups should be those giving support on the object group. This is a way of quickly assigning an object to all members of a support group.
5. You also have the possibility to set which group should be the object group's first support group. Read more about this in the section “Connect support groups”.

**Add Questions**
When you have registered a new object group, or if you select an existing one, the system will display a list of questions which the user is required to answer for each object group. You will be able to select from the questions in the question pool and add the questions you want to each object group. (Note: New questions must be entered in the question pool, which you access through the “Administration” > “Object administration” > “Question pool” option in the right-hand menu.)

1. Click the button "Add questions" at the bottom of the page to add more questions.
2. Use the question list and select the question you want to add.
3. Click "Add". Repeat until you have selected all the questions which you want to use for this object. Close the window.
4. You can change the order of the questions simply by entering a new number in the box below the heading "Order".
5. You can delete a question by clicking the icon with the red x displayed next to the question. You also have the option of making questions compulsory.

**SLA**
If SLAs (Support Level Agreements) are used in HD-Advanced and the setting has been made to link SLAs to object groups, the button “SLA” which you click to link an SLA to the object group is displayed. Among the object group’s details you will also find the heading “SLA” with the name of the valid SLA. Click the name to display information about the SLA and its levels of service. For more information about the links, see the section “SLA Administration”.

**Standard Ticket**
Here you can create and prepare standard tickets which you can use to handle equivalent tickets. You can create standard tickets in advance with a priority, ticket description, actions and solutions, as well as answers to questions and classification question. When you then create a new ticket, you can choose to create it based on a standard ticket and so avoid entering the information already available in the standard ticket.

Choose an object in the top selection list. If you first choose an object group in the left selection list, only the objects belonging to this object group will be displayed. In the selection list “Standard ticket” you choose an existing standard ticket if you want to edit it, or “New standard ticket” if you want to create a new one.

If you choose to create a new standard ticket, you enter a ticket title and then click “Save”. The object’s ticket form will then be displayed. Enter your information. Ticket description and questions/classification question made mandatory must be entered. These will be marked by an asterisk. You also
have the possibility to set a priority, enter a solution and create actions.

When you create an action “Action title” and “Action” are mandatory fields. You can also in the “Administrator” selection list choose which administrator should carry out the actions and if the action should be visible to the customer. Against “Action date” you can decide what date should be set in relation to the registration date. If you enter “0”, the action date will be the same as registration date, if you enter “1”, the action date will be one day after the registration date and so on.

Actions you create on the standard ticket will receive the status “Not done” when the ticket is registered.

Example:
The IT department is responsible for ordering, installation and configuration of new computers to employees. The IT department then creates a standard ticket where everything that needs to be done from ordering to delivery is added as actions. The different actions should be performed by different people and will therefore have different administrators. The actions should take place at different times, and appropriate action dates will then be set for each action. When a computer is ordered, a new ticket is created based on the standard ticket. The set amount of days after the ticket has been registered, the actions will be visible to the relevant administrators to-do lists.

Classification
Classification is a way for the support personnel to classify a ticket for use in statistics etc. In the reports you can make selections based on the answers to the classification questions. The classification questions are similar to the questions you create in the question bank and use in the ticket form. The difference is that the classification questions are not connected to a specific object and are only visible to the support personnel.

Create New Classification Question
The questions you register are stored in alphabetical order. You can however change the order later on.

1. Click "Administration" in the main menu and Object administration > Classification in the right-hand menu.
2. Select "New question" in the selection list at the left top of the page.
3. Enter your new question in the "Question" text field.
4. Select a "Type of question" in the selection list. This list includes the different types of questions you must choose from, eg selection list, selection box, check box, radio buttons, text field or text area.
5. Click "Save".
6. Click "In other languages" to enter the question in the other languages available in HelpDesk. Enter the question and click "Save".

Reply Options
The question types "Selection list", "Selection box", "Check box" and "Radio buttons" require you to add reply options. This does not apply to "Text field" and "Text area".

1. Click "Add options" if this question type requires it. Enter an option in the displayed window and click "Add". Repeat this procedure until you have added all the options you want. Click "Close".

2. The reply options are now listed in the table at the bottom of the page. Your new option is listed at the bottom of the table, below any existing options. Next to each option there is a row with the alternatives "In Other Languages", "Order" and "Delete". This allows the administrator to edit the reply options.

3. Since HelpDesk can handle several languages, you may need to prepare options in other languages. To enter options in more than one language you click the link "In other languages" next to the option concerned.

4. The system displays a window with one text field for each language available in HelpDesk. Enter the option in the languages required, click "Save" and "Close".

Order of Reply Options
The fields below the heading "Order" can be used to change the order of presentation of the reply options.

1. Enter the sort order number you want in the box below the heading "Order". The numbers indicate the order in which the reply options are listed.

2. Make your changes and click "Save".

Delete Reply Options
You can delete a reply option by clicking the icon with the red x next to the option you want to remove.

Make Question Mandatory
Mark the check box "Mandatory" if the questions must be answered before a ticket can be closed.

Hide Question in Advanced Search
Under Search solution > Advanced search, you can choose to make a selection based on classification. By marking the check box "Do not show question in Search solution > Advanced" you can choose that the question should not be shown as a selection there.

Allow Questions to Share Row
To reduce the space the questions take up in the ticket form, you can choose that two questions should share a row. The two questions sharing a row must both have the check box "Question can share a row with other question" marked, and they must also be in succession.

Edit Questions
You can also edit an existing question.

1. Select a question in the selection list under "Classification".

2. If you want to edit the question you click the button "In other languages".
3. Make your changes in the text fields for the different languages. Click “Save” and “Close”.

4. To add more options, click “Add option” and follow the instructions in “Create new question”, “Reply options” in the text above.

**SLA Administration**

Under this menu you can create the SLAs (Service Level Agreements) which you have made with your customers. You define which levels of service which should apply for the different SLAs, what SLAs should be linked to in HelpDesk, for example the organisations, and if it should be possible to link SLAs to priorities. Here you can also make the links. This can also be done where you have chosen for the links to exist, for example on organisation level. In order to make sure the levels of service are adhered to, reminders can be created which are sent by e-mail at given times to the people concerned. For the menu “SLA administration” to be visible, the setting “Use SLA” must be activated under “Other settings” > “Advanced”.

**Basic information**

In the selection box at the top of the screen, you can choose an existing SLA which you want to edit, or “New SLA” if you want to create a new one. The check box “Eligible for new connections” must be marked for new connections to be made to this SLA. Enter the name and description for the SLA. Under the heading “Documents” you can attach a file. If a file with the same name already exists, it will be replaced by the new file uploaded.

Under “Levels of service” you set the level of service for the following phases:

- Handle ticket
- Answer ticket
- Close ticket

For each of these you set a percentage (of tickets) and a time indication (the time within which the phase should be completed), for example that 80% of the tickets should be closed within two days.

If the setting “Link the SLA’s levels of service to priorities” has been chosen under the “Settings” menu, for each priority you can set the level of service for “Handle ticket”, “Answer ticket” and “Close ticket”.

Click the button “Reminders” to open a pop-up window where you create messages and decide when and to whom they should be sent. “Reminders” is also available as an option in the right-hand menu. See the section “Reminders” for more information.

**Settings**

Here you decide if SLAs should be activated and to what the SLAs then should be linked.

- not used – SLAs are not used in the system
- to objects – SLAs can be linked on object level

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• to object groups – SLAs can be linked on object group level
• to organisations – SLAs can be linked on organisation level
• to the supported objects of the organisations – SLAs can be linked on organisation level and the organisation's objects can have different SLAs
• to the supported object groups of the organisations – SLAs can be linked on organisation level and the organisation's object groups can have different SLAs
• to the organisation groups – SLA can be linked on organisation group level
• to the supported objects of the organisation groups – SLAs can be linked on organisation group level and the organisation group's objects can have different SLAs
• to the supported object groups of the organisation groups – SLAs can be linked on organisation group level and the organisation group's object groups can have different SLAs

If the setting “Link the service levels of an SLA to priorities” has been marked, for each priority you can set the level of service for “Handle ticket”, “Answer ticket” and “Close ticket”.

Links
Under “Links”, one or two selection lists will be displayed at the top, depending on how you have chosen your links to be made. If for example you have chosen that links should be made on the organisation's objects, a selection list to choose organisation and a selection list to choose the object will be displayed.

To make a standard link which will be default when no specific link has been made, you choose “General SLA” in the selection list/lists. If not, make your preferred choices in the selection list/lists before you make the link. When two selection lists are displayed you first need to choose organisation or organisation group in the right hand list. If you select “General SLA” in the right hand selection list, the connection will apply for objects or object groups where no connection has been done.

Create the link by choosing an SLA in the selection list under “New link”. Mark the check boxes against “From” and “To” to display calendars where you choose from what date the SLA should apply and when it should no longer be valid. If you do not set an end date, the SLA will apply until further notice.

Links which are made will be listed by name and by from and to date. There are also icons to edit and delete the connection.

It is also possible to make the SLA links at the point in the software where you have decided the connection can be made. If for example you have set that the links should be made to organisations, the button “SLA” will be available when you enter and edit an organisation's details. If you click this button, you will open a window where you make the connection in the same way as under the SLA administration. The organisation you have entered from will be set as default.

Response Methods
Under the menu “Response methods” you administrate the contact methods which should be available for a ticket. In the selection list under “Response methods”, you choose an existing contact method which you want to edit or “New response method” to create a new one. Enter the name in all languages and save. When you have chosen an existing response method you can delete it by clicking the button “Delete”, unless this response method is in use for any ticket.

Reminders

Here you create reminders in the form of e-mail messages which will be sent out to relevant support personnel. Percentages are set for the SLA’s service levels for how many tickets should be solved within a certain time frame. The reminders will be sent out when a set time has passed measured in percent of the time the level of service states.

Create a Reminder Message

Start by creating the actual e-mail message which should be sent out as a reminder by clicking the button “Messages”. In the selection list under “Messages”, choose “New message”. Enter a name for the message under “Name”. What you enter as name here will also be used in the subject line of the message.

In the editor you create the message combining text you create and data which is collected from each ticket. Insert the required ticket data by clicking the corresponding button. For example, when you click the button “Ticket number”, a control is inserted within each message which generates the ticket number for the ticket concerned. Save the message and click “Back” to go to the page where you create the actual reminder.

Edit and Delete Reminder Message

To edit a message, select it in the selection list under “Messages”. Make your changes and save.

When you have chosen a message you can also delete it. Remember that all reminders in which the message is used will be deleted as well.

Create Reminder

If an existing reminder is shown under “Active reminders” you first need to click the button “New reminder”. Under the heading “New reminder” you create the new reminder.

1. Select the reminder message in the selection list under “Select message”.

2. Decide to which level(s) of service the reminder should apply: take ticket, answer ticket and/or close ticket.

3. Set how many reminders should be sent out and at what times, in percent of the time the level of service states. Example: if you choose for three reminders to be sent out with the interval 30%, they will be sent out when 30, 60 and 90% of the time has elapsed.

4. Choose the recipients who should get the reminder. At the bottom of the screen you find check boxes which you mark to send the reminder to the relevant ticket operator, object manager and
5. If you click the button “Add” under the heading “Users in HelpDesk”, you open a window where all users in the support team are listed. You can also use the search field at the top of the list.

6. If you want to add a recipient who is not a user in HelpDesk, you click the button “Add” under the heading “Other recipients”. You will then see a window where you can enter the recipient's name and e-mail address.

7. Save. The reminder will be listed under “Active reminders”.

*Edit and Delete Reminders*

If you want to edit a reminder you click it under “Active reminders” to mark it. In the bottom part of the window you will see the heading “Edit reminder” and then the settings made for the reminder. Make your changes and save.

Against each active reminder you find an icon with an x which you click to delete the reminder.

**E-mail Settings**

*Settings*

*Send E-mail when Delegating*

Mark the check box if you want an e-mail to be sent to all members of the support group a ticket is delegated to.

**Other Settings**

*Colours*

*Colours for Ticket List*

If you mark the check box “Use organisation group colours”, you can for each organisation group decide in which colour their tickets should be displayed. If both priority colours and organisation group colours are used, all organisation group colours take precedence over all priority colours except black.

**Advanced**

*Show the Name of the Support Group in the Ticket List for the Support Personnel*

Activate this setting if you want relevant support group’s name to be displayed in the ticket list instead of status. You can still see the status as a tool tip when holding the mouse pointer over the support group name. This setting only affects the support personnel, not the customers.

*Use SLA (Service Level Agreement)*

Mark this check box if you want to administrate SLAs in the system.
**Use Object Groups**
In HD-Advanced, the objects can be grouped together in an object group. Mark the check box if you want to activate the use of object groups.

**Make it Possible to Link Support Groups with Object Groups**
Activate this setting in HD-Advanced if you want to decide which object groups a support group should give support on. The members of the support group will then automatically get the right to give support on these object groups. The setting also makes it possible to choose the “First support group” on object group level. Read more about this in the section “Link support groups”.

**Make it Possible to Link Support Groups with Objects**
Activate this setting if you want to choose which objects a support group should give support on. The members of the support groups will then automatically get the right to give support on these objects. The setting also makes it possible to choose the “First support group” on the object level. Read more about this in the section “Link support groups”.

**Allow the Use of the Final Customer**
Mark the check box if you want the possibility to define a customer organisation as final customer. A final customer can be linked to a customer organisation and this customer organisation can then register tickets for the final customer.

**Use Classification of Tickets**
The setting makes it possible to create under “Object administration” classification questions which are shown on all tickets. Classification is a way for support personnel to classify a ticket and use it for statistics etc.

**Make it Possible to Link Tickets to One Another**
This setting makes it possible to link tickets which are caused by the same problem. Associated tickets are then linked to a main ticket. When the main ticket is closed, the solution is also entered on all associated tickets which are closed as well. When you close the main ticket, you can also choose to automatically send e-mail messages to all users who registered the associated tickets to inform them of the solution.

**Use Standard Tickets**
Activate this setting if you want to be able to create and prepare standard tickets which you can use for similar tickets. You can then prepare tickets in advance with a priority, ticket description, actions and solutions as well as answers to questions and classification questions. When you later create a new ticket you can choose to create it based on standard tickets and consequently not have to enter the usual information.

**Allow Ticket Operators to See All Tickets Taken by the Support Group(s) they Belong to**
If in HD-Advanced you want ticket operators to see tickets being taken by other operators in the same support group, you check this box. If you clear the box “Allow ticket operators to see all tickets", operators will only see tickets taken by the group they belong to.

**Authorise Ticket Operators to Create a Standard Ticket Out of a Ticket Upon Closing It**
If this setting is activated, the check box “Create a standard ticket out of this ticket” is available when a ticket is closed. Mark this box if you want the ticket you are closing to be saved as a standard ticket. If you want to edit
the standard ticket, it is available under “Object administration” > “Standard
tickets”.

**Reports**

When using HD-Advanced there are three additional reports, “Volume/Org.
Group” and “Volume/Final Customer, which display the ticket volume per
organisation group and final customer, respectively, and the SLA report
which shows whether the goals of the SLA have been fulfilled concerning
the stages Handle ticket, Answer ticket and Close ticket.

In all reports, you can make your selection based on organisation group,
final customer, support group, object group and answers to classification
questions. If SLAs are used, you can also base your selection on SLA and
Response method.

In the reports that can be displayed grouped, ie “Ticket handling time”,
“Ticket volume” and “SLA report”, it is possible to group reports “Per
organisation group”, “Per final customer”, “Per support group” or “Per object
group”. If SLAs are used, the reports can be displayed grouped “Per SLA” or
“Per response method”.

In the report “Ticket list” there are the variables “Classification”, “Object
group”, “Final customer” and “Support group”. If SLAs are used, there are
the variables “Response date”, “Response method” and “SLA”.

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HD-TIME – Linking HelpDesk and TIME

General information
The link between HelpDesk and TIME is a way to simplify the use of TIME when using HelpDesk. This link allows you to start registering your working time in TIME upon opening a HelpDesk support ticket. When closing the ticket, or temporarily start processing another one, you can stop the time registration.

Artologik HelpDesk controls Artologik® TIME. When you use HelpDesk to edit the information on a customer which has been registered as a TIME customer in HelpDesk, the information on this customer is also updated in TIME.

Administration
Organisation
Select "New Organisation" to register a new organisation in HelpDesk. Enter all details and select in the list at the top of the page if you want to create a new customer or if you want to link it to an existing one in TIME. The customers displayed in the list are those who have already been registered in TIME but are not linked to a HelpDesk customer.

If you select "Create new customer" the information will be copied to TIME and the customer will also be added to that program.

If, instead, you select to link the new HelpDesk customer to an existing customer in TIME, the information in HelpDesk will be overwritten by the information in TIME for the relevant customer.

You can also designate the support objects the customer will receive support for. To do so, select the relevant objects and move them by clicking the arrow. Click "Save". Depending on a setting under Administration > Other settings > Time link, one project per organisation or one project per each supported object of the organisation, is created in Time. When you save the customer objects one project per object is registered in TIME. The name-standard used for projects is Customer name - Object. When you change the customer name of an existing customer in HelpDesk, the project name in TIME is not affected.

Users
The link makes it possible to create and maintain users in one place, either in HelpDesk or in TIME.

New users created in HelpDesk, in an organisation that has the role "Support organisation", are copied into TIME. You must, then, go to this application and activate them.

New users who are created in TIME are copied into Helpdesk as inactive customers.
users and are automatically added to the support organisation which was first created. The updating of the user information is synchronised. When inactivating a user in one of the programs, the same user in the other program is not automatically inactivated. It needs to be done manually. When moving a user from one organisation to another, the user remains active in TIME until he is inactivated in The updating of the user information is synchronised.

In order for the time registration to work, the user must be active in TIME.

**Time-link settings**

In Other Settings > Time-link you can choose how new projects will be set up in TIME when an organisation in HelpDesk is linked to an organisation in TIME. If you select the setting "Each organisation in HelpDesk is linked to a project in TIME", one project per organisation will be created. The project will have the same name as the organisation. If the setting "Each object for which an organisation is entitled to support in HelpDesk is linked to a project in TIME", one project per each supported object of the organisation, is created. The project names will take the form [Organisation - Object].

You can also choose whether you want automatic time registration. Time registration will then start when creating a new ticket or opening an already existing one, which is linked to a customer registered in TIME. Time registration stops when you close the ticket.

Select a default time code and a default activity to be used when registering time. You can set how many characters of your organisation's name will be used in the project title.

**Ticket handling**

When you are handling tickets in HelpDesk you can at the same time register your working time in TIME. You can register your working time in different ways: using the pop-up window "Time registration (automatically or manually), in the ticket form under the heading "Time registration" or when you are working with an action. The pop-up window Time registration

Using the automatic time registration, the pop-up window Time registration opens and the registration starts when you create a new ticket or open an existing one and stops when you temporarily close it. In order to use the automatic time registration, the function must be activated in Administration > Other settings > Time-link. Even if automatic time registration is activated you can register time manually if needed.

You can also use manual time registration by clicking the date at the bottom left of the HelpDesk window. This action will open the pop-up window "Time registration". If you have a ticket open when clicking the date, the Customer, Project, Activity and Time code are already pre-selected and the ticket number is copied to the Comment field. If you do not have any opened ticket, you have to fill in the information by yourself.

There are two ways of registering your working time.
• Specifying the number of minutes you have worked on a ticket. Then click the floppy disk icon to save.

• Clicking the clock to start registering when you begin processing a ticket. When you finish working on the ticket, you must click the Save button to register the time worked in TIME. If the web browser crashed or accidentally got shut down, timekeeping would continue from where it was before the shut down, as this information is saved on your local computer as a cookie.

If you have several registrations listed in your pop-up window, click the registration you want to register time for. You can not have more than one registration ticking at a time. When starting a new one the last one will stop.

If you want to undo a started registration, delete the time in the time field, the field should be blank. Close the registration by clicking the X-icon.

If you want to minimize the registration, click the minus icon. If you want to expand, click the plus icon.

Register time in the ticket form or when working with an action
Under the heading “Time registration” in the ticket form, the time registrations that have been made for the ticket are listed, and here you also have the possibility to register time directly in the form. In the selection lists you select activity, time code and the time to be registered. You can also enter a comment on the registration. Click Save to complete the registration. It will be listed with the headings “Date”, “Registered by”, “Activity”, “Comment” and “Time”.

When you work with an action you can in the same way register time directly in the window of the action. Here also you select activity, time code, comment and time to be registered. The registration is listed in the action window as well as in the ticket form, along with other time registrations for the ticket.
HD-Asset – Linking HelpDesk and Asset

General
Asset is an inventory system that gives you an overview of computers, software, licenses, etc. in your organisation. It can be used as a standalone application, but when linked to HelpDesk, you can link the assets to users in HelpDesk and have information from Asset available when a ticket is created and processed.

Here, the parts relating to HelpDesk are described. For detailed information on Asset, see the separate manual.

Administration

Users
In each user's profile it is possible to create a list of the assets to which the user has access. This is done under the heading Specify the assets connected to this user.

Select Value type in the selection list and enter an ID / Value identifying the asset in Asset. Available value types are IP address, Name, Serial number and Unit identity. Click on the icon View asset to search in Asset and see information about the asset. Click Save to add the asset to the list. If you want to delete it, click the icon with the red x.

Ticket handling
Under the heading Asset in the ticket form, you can associate an asset with the ticket. You connect the asset by selecting the Value type and entering ID / Value. For each ticket, you can only associate one asset.

After entering the Value type and ID / Value, you can click on the icon View asset to search in Asset and see information about the asset. Do not forget to save.

If there are assets linked to the user for whom the ticket is registered, the link “Choose from the asset list” is available. Click on the link to view the user's assets. Select one of them by clicking on it. The data for the Value type and ID / Value is automatically filled in. Click Save.

Reports
Value type and Value have the same function in the report section as other selection criteria.

In the reports that can be displayed grouped, ie “Ticket handling time”, “Ticket volume” and “SLA report” (the latter is only available in HD-Advanced), it is possible to group reports “Per value type” or “Per Value”.

In the report “Ticket list” there is a new variable “Asset”.

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