



HelpDesk

i GDPR – Personal data in Artologik HelpDesk



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SOFTWARE FOR THE WEB



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Which user information is stored?

In HelpDesk, users of two kinds can be created, support users and customer users. The fields in the user details can be divided into two types:

Standard fields

- First name
- Family name
- Title
- Address
- Zip code
- Town
- Country
- Phone
- Mobile phone
- Fax
- E-mail
- Comment
- User fields (additional fields, created by a system administrator)

In version 5.0, you have access to the *Administration > Organisations > Field settings > User fields* menu where you can decide which standard fields and user fields shall be available, and which shall be mandatory, in the user details. If you have the plug-in HD-Advanced, you can for each organisation group make a specific setting, or let it use the default setting.

Organisation group
GB

Organisation fields | **User fields**


Standard fields	Visible	Mandatory
First name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Family name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Title	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input type="checkbox"/>	<input type="checkbox"/>
Zip code	<input type="checkbox"/>	<input type="checkbox"/>
Town	<input type="checkbox"/>	<input type="checkbox"/>
Country	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fax	<input type="checkbox"/>	<input type="checkbox"/>
E-mail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

User fields	Connected to the organisation group: GB	Mandatory
Certified user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>


Users' right to view their own data

Users can log in to the program and view their personal data in the *Administration > Users* menu. However, this requires that the setting *Do not allow customers to see or edit their own personal information* has not been activated under *Administration > System settings > Advanced*.

Administrators, ticket operators and phone operators can, on request, export a user's personal data to Excel by following these steps:

1. Go to *Administration > Organisations > Customer organisations* (to export customer users) or *Administration > Organisations > Support organisations* (to export support users).
2. Enter the user's whole or partial name, user name or e-mail address in the *Search text* field and click the *Search user* button. The user is listed on the page.
3. Click the  icon next to the *Search user* button. Tick the checkbox next to all fields you want to include in the export and click the *Create Excel file* button.

If a user requests information about the tickets registered for them, you can export these tickets in two ways:

- Save each ticket as a PDF file (only possible for closed tickets)
 1. Go to the *Search solution > Advanced search* menu.
 2. Enter the user's first name, family name, e-mail or user name in the *Registered for* field and click the *Search* button.
 3. Click on one of the tickets in the list, and then on the *Save as PDF* button. Click *Back* and repeat for any other tickets.
- Create a report of the type *Ticket list* and export it to Excel
 1. Go to the *Reports > Ticket list* menu and click the *New report* button.
 2. Select the user at *Registered for* under *Selection*.
 3. Select *No limits* under *Period*.
 4. Under *Report content*, select the ticket data you want to display in the report.
 5. Click the *Save* button, and then the *Show report* button.
 6. Click the  icon to export the report to Excel.

To consent to the information being stored

Users cannot register themselves as users. Instead they are added by a system administrator (also ticket operators and phone operators can be assigned this right), or by an organisation administrator in their own customer organisation.

Under *Administration > System settings > Advanced*, you can activate the function *Show a message the first time a user logs in*. Enter a login message to be displayed the first time a user logs in after the function is activated, and decide the text for the button the user clicks to accept/continue. This message can be used to inform the user about your personal data policy, and the user accepts these conditions by clicking the button.

Deleting or anonymising users

In version 5.0, a *Delete...* button is available in each user's details. When you click this button, you can choose to *Delete* the user completely or *Anonymise* the user.

If you try to delete a user who cannot be deleted, you will get a message informing you about the reason. There are various reasons for why a user cannot be deleted, for example when the user:

- is connected to a ticket
- is owner of a report
- is object manager for an object
- has created questions, organisation fields, user fields or standard responses
- appears in the history log in a user profile

When a user is anonymised, the user is inactivated and the following fields in the user profile are cleared:

- Title
- First name
- Family name (replaced by *ANONYMISED*)
- Address
- Zip code
- Town
- Country
- Phone
- Mobile phone
- Fax
- E-mail
- Comment
- User name (replaced by 20 randomised characters)
- Language (changed to the system's default language)
- Additional user fields of all types
- Assigned rights, for example an organisation user's right to see all tickets in his own organisation
- Objects supported for the user
- Objects the user is supporting
- Support groups the user is member of

Under the *History* tab, all previous events are cleared and replaced by the event *The user was anonymised*.


All tickets registered for this user will also be anonymised and any open tickets will be closed. The following fields and sections in the ticket form will be cleared:

- Ticket title
- Ticket description
- Solution
- Registered for (the user is now called *ANONYMISED*)
- Other contact persons
- E-mails and messages
- Action titles and action descriptions
- Attached files
- Questions of the following types: *Text field*, *Text area*, *Text list*, *Numeric field* and *File*.
- Classification questions of the following types: *Text field*, *Text area*, *Numeric field* and *File*.
- Product questions of the following types: *Text field*, *Text area*, *Numeric field* and *File*.

If you anonymise a support user, any tickets registered for that user will be anonymised as described above. However, nothing will be cleared on tickets handled by that user. Since the user has been anonymised, his/her name will be replaced by *ANONYMISED*, for example at *Handled by* and in the ticket history. Please note that the user's name and personal information may still be found in e-mails on the ticket, and in fields where the information has been entered manually, e.g. in the ticket description and solution.

Deleting tickets

Tickets can be deleted one at a time from the *Search solution* menu. After clicking a ticket from the search result, you can click the *Delete ticket* button. Administrators have the right to delete all tickets. Authorized ticket operators have the right to delete tickets which they would be able to handle if they were reopened. Whether all or only selected ticket operators have this right depends on which setting is selected under *Administration > System settings > Advanced: Allow all ticket operators to delete tickets they can handle* or *Allow selected ticket operators to delete tickets they can handle*. If the latter setting is activated, the ticket operator must have been assigned the right *Can delete tickets* in his/her user profile.

Tickets can also be deleted directly from the ticket list under the *Tickets* menu. Users with the right to delete tickets can, when editing a ticket list via the  icon at the top of the page, activate the possibility to delete several tickets at the same time, by marking the checkbox *Activate function for permanently deleting tickets directly from ticket list*. When this setting is active, all tickets in the ticket list will have a checkbox to the far left. These checkboxes are used for selecting the tickets to delete, and the deletion is accomplished by clicking the *Delete* button.

In version 5.0, you can activate an automatic removal of tickets older than a specified number of months. You can set this function to delete old tickets completely, or to only remove parts of their content.

To start using the function, tick the checkbox *Enable automatic removal of tickets* in the *Administration > System settings > Advanced* menu. Specify the number of months that must have passed for the tickets to be affected and select if the time shall be counted from the ticket's registration date (all tickets, irrespective of status, will be affected) or closing date (only closed tickets will be affected). Finally, decide *Type of removal: Total* (the tickets will be deleted completely) or *Partial* (the tickets will be kept, but parts of their content will be removed).

Automatic removal of tickets

Enable automatic removal of tickets

Remove tickets older than months

Counting from the ticket's

Registration date

Closing date

Type of removal

Total

Partial

If you select *Partial*, affected tickets' status will be set to *Closed* and the following fields and sections in the ticket form will be cleared:

- Ticket title
- Ticket description
- Solution
- Other contact persons
- E-mails and messages
- Action titles and action descriptions
- Attached files
- Questions of the following types: *Text field*, *Text area*, *Text list*, *Numeric field* and *File*.
- Classification questions of the following types: *Text field*, *Text area*, *Numeric field* and *File*.
- Product questions of the following types: *Text field*, *Text area*, *Numeric field* and *File*.

Delete anonymous user information

If you do not want the personal information that is filled in when a ticket registered for an anonymous user to be stored, you can activate an automatic clean-up of this information after a specified number of months. This applies to the information which is entered in these fields in the ticket form:

Anonymous User

Organisation:

First name:

Family name:

Address:

Zip code:

Town:

Country: ▼

E-mail:

Phone:

Mobile phone:

Please note that all other information which have been entered in the ticket form, e.g. in the ticket description, will not be deleted. You activate this function by marking the checkbox *Enable automatic clean-up of anonymous user information* under *Administration > System settings > Advanced*. Then you specify how many months after the ticket has been closed the information shall be deleted.