Artologik HelpDesk

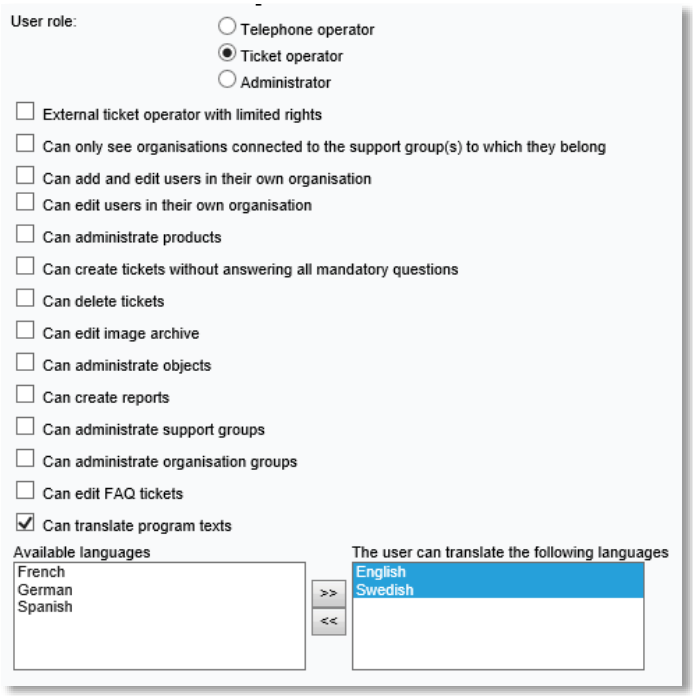
New features, Version 4.2

Table of content

General

Allow ticket operators to translate texts

A new setting makes it possible to, per ticket operator, decide whether or not they should be able to translate/edit texts for the languages used in the program.



The setting is made for each user in the user profile. For all ticket operators you can select *Can translate program texts*. By doing so you see the languages used within the program and move preferred languages to the right hand box *The user can translate the following languages*.

More filter alternatives in the question administration

When administering questions under *Question pool* you now have the possibility to filter questions on *Administrated by organisation* and *Created by user* for the questions you have the ownership of, thus making it easier to find the specific question you wish to edit.

Go to *Administration* > *Object administration* > *Question pool*. At the top of the page you see the two selection lists *Administrated by organisation* and *Created by user* where you make your selections.

Please note: Only administrators see the drop down *Organisation*. All other users are only allowed to see questions administrated by their organisation and can only filter by *User*.

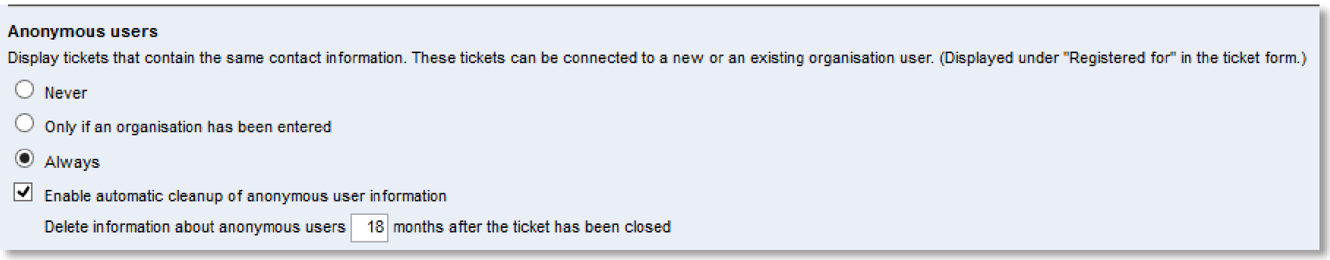
Allow ticket operators to send ticket receipts when handling a ticket

Did you forget to send a receipt to the customer upon ticket registration, or has the customer asked for a new receipt? A new button has been added within the ticket, making it possible for the ticket operator to send receipts from within the ticket. The button can be found under *E-mails and messages* > *Send receipt*.

Automatic clean-up of information about anonymous users

In order to oblige with existing regulations regarding the Privacy Protection Law, you might need to do recurrent clean-ups of collected information about anonymous users who have registered tickets.

This setting is made under *Administration* > *System settings* > *Advanced* > *General* where you mark the checkbox by *Enable automatic cleanup of anonymous user information*. Below you specify when the ticket the information will be deleted. The time set is calculated from when the ticket was closed.



Change sort order

You can now change the sort order of the report content in the report *Ticket list*. Click the arrows up/down in order to change the order of the content.

Tickets

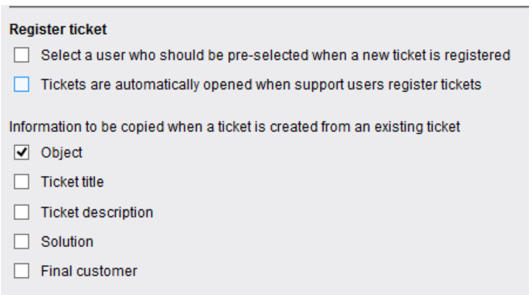
Automatically use ticket description as ticket title if none has been given

If you only fill out a ticket description and no ticket title, the first 30 characters will be copied to the ticket title.

Since before, ticket title is copied to the ticket description if no such is given. Should neither ticket title nor description be given, a notice will appear stating that ticket title is compulsory.

Create a new ticket from an existing ticket and copy information.

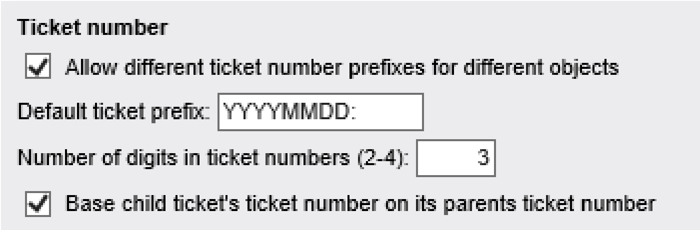
When you work inside a ticket, you are able to create a new ticket based on the current ticket and user. Under *Administration* > *System settings* > *Advanced* > *General* > *Register ticket* you can mark what information you want to copy into the new ticket. Possible information is *Object*, *Ticket title, Ticket description and Solution.* (*Final customer* could also be copied, if used.)



Click the icon next to the person that the ticket is created in order to create a new ticket from an existing ticket. You can also find this function under *New ticket* when you have clicked the icon for “Quick search” and opened a FAQ-ticket. There you can find the button *Create new ticket from the FAQ ticket*. Using this button, you can eazily create a new ticket based on this FAQ ticket.

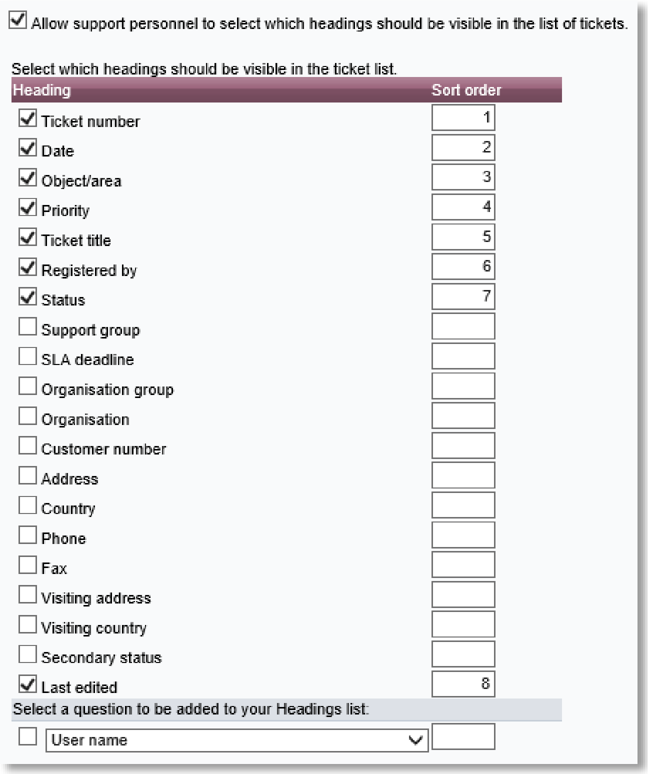
Create suffix for child tickets

A new setting enables you to create a suffix for child tickets. This will, for instance, mean that a child ticket for ticket 20140930:005 will get the ticket number 20140930:005-1, thus making it easier to see the relation between the tickets.



You make the setting by going to *Administration* > *System settings* > *Advanced* > *General* and mark the check box by *Base child ticket’s ticket number on its parent ticket number*.

Show *Last edited* in the ticket list



In order to get a better overview and easier see when a ticket operator has worked with a ticket, you can now choose to have *Last edited* as a headline in the ticket list.

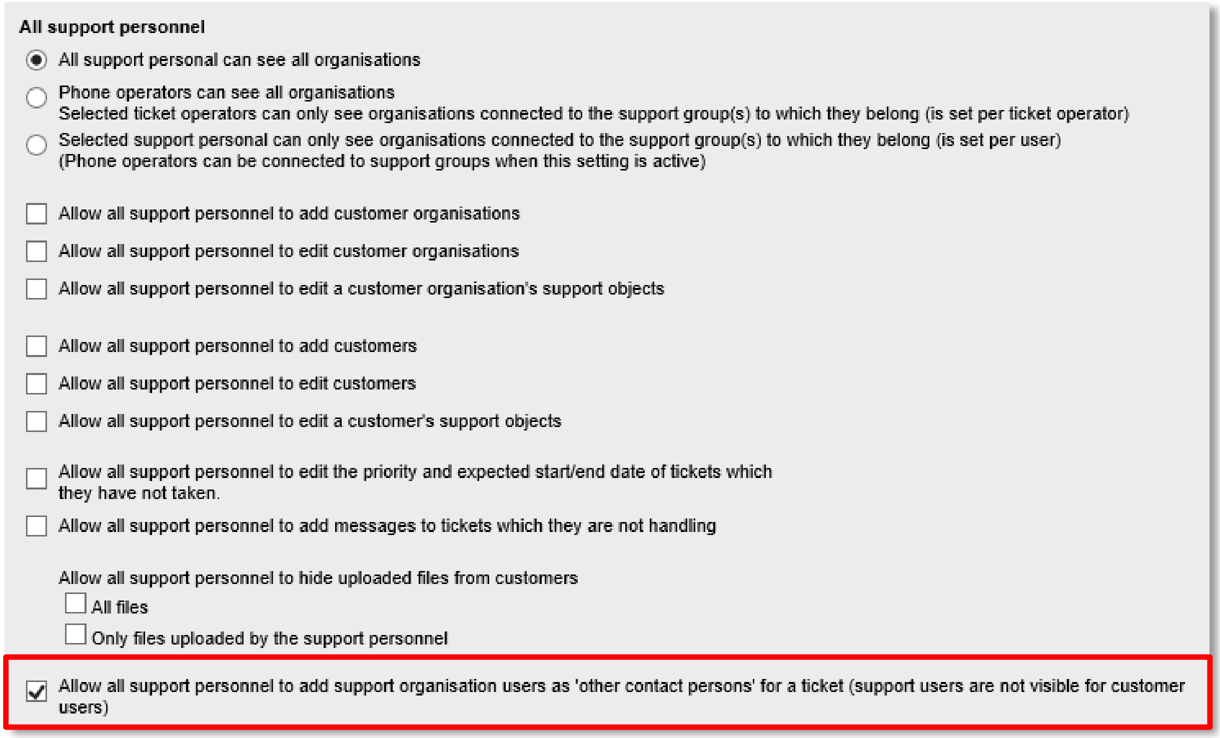
In order to show *Last edited* in the ticket list, go to *Administration* > *Application settings* > *Ticket list*. Mark the check box by *Last edited* in the *Heading* list. See the red box in the picture to the left.

Search for e-mail address and phone number in advanced search

We have added the possibility to search for an e-mail address or a phone number when doing an *Advanced search*. You simply type the e-mail address/phone number in the text field and click *Search*. If you do not know the entire e-mail address, you can type parts of it, as for example *@artisan.se.

Add support personnel as other contact persons for a ticket

There might be occasions when you need to extend the list of contact persons for a ticket. This is now possible to do.



You enable the setting under *Administration > System settings > Advanced* and mark the check box by *Allow all support personnel to add support organisation users as 'other contact persons' for a ticket (support users are not visible for customer users)*.

Allow support users to add messages to tickets they are not the owner of

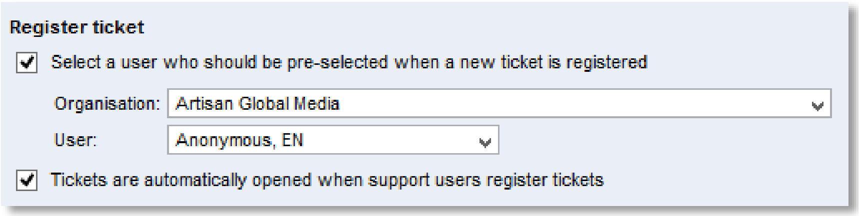
By allowing other support users than the owner of the ticket to write messages in the ticket, the communication between the support staff can be simplified. You enable the setting via *Administration > System settings > Advanced > User rights > All support personnel: Allow all support personnel to add messages to tickets which they are not handling*.

Pre-selected user when registering a ticket

It is now possible to set a specific user, as for example an Anonymous user, as pre-selected when registering a ticket. Make the setting under *Administration* > *System settings* > *Advanced* and mark the check box by *Select a user who should be pre-selected when a new ticket is registered*. In the drop down lists you select preferred organisation and user.

Should the pre-selected user not be the correct one for the specific ticket, it is possible to search for and select another user instead.

When you have a new incoming e-mail a search is made on the sender e-mail address. If there is a match, you will see it in the search list. If there is no match the pre-set default user is selected.

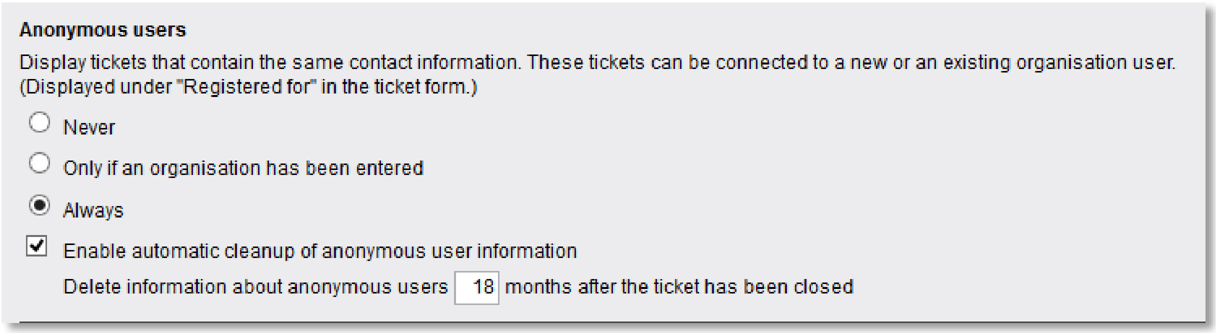


Let support members automatically open tickets they register

After selecting an object and entering a ticket title, ticket operators and administrators can now handle tickets automatically at registration without clicking *Open ticket*. You can choose this setting for ticket operators holding the right to work with the selected object and it means that one step can be surpassed in the process.

Go to *Administration* > *System settings* > *Advanced* > *General* and mark the check box by *Tickets are automatically opened when support users register tickets*.

Search ticket history for the e-mail/telephone number of an anonymous user



Do you allow for tickets to be registered for anonymous users? We have now made it possible for the support staff to see tickets registered for anonymous users where the same contact information has been given. The software searches the fields for e-mail address/telephone number and the support staff can in this way get access to any ticket history.

The function is activated under *Administration* > *System settings* > *Advanced* > *General* > *Anonymous users*: *Display tickets that contain the same contact information. These tickets can be connected to a new or an existing organisation user.* (Displayed under *"Registered for"* in the ticket form.)

The possible selections are: *Never*, *Always* and *Only if an organisation has been entered*.

Never: No other tickets will be displayed.

Always: All tickets where there is a corresponding e-mail address and/or telephone number will be displayed.

Only if an organisation has been entered: Tickets with matching contact information will be displayed if an organisation has been entered in the contact information upon ticket registration.

You get to this function by clicking the user name under *Registered for* inside the ticket. At the bottom of the pop-up window tickets are displayed if a selection has been made for this to be done. If any connection can be made to an already existing user it is possible to connect the ticket to this from here.

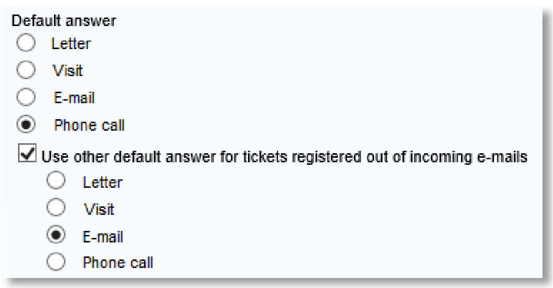
In cases where a registered user exists with the same contact information, this is always displayed under *Registered users with matching contact information*.

Automatic ticket description in the solution field if a solution has not been specified

Specifying a solution for the tickets before they are closed is compulsory, but it is now possible to set so that the ticket description is automatically copied to the solution field when such has not been filled out upon ticket closure. The setting is made under *Administration* > *System settings* > *Advanced* > *General* > *Close ticket*. Mark the check box by *Automatically copy the ticket description into the solution field if no solution has been entered when the ticket is closed*.

Special default answers to questions for tickets incoming via e-mails

Since before it is possible to beforehand set a predefined answer alternative for ticket questions. Now you can also choose to predefine an answer specifically for questions created from incoming e-mails. The setting is made per question under *Administration* > *Object administration* > *Question pool* where you mark the checkbox by Use other default answer for tickets registered out of incoming e-mails and specify your e-mail specific predefined answer.



New search for object

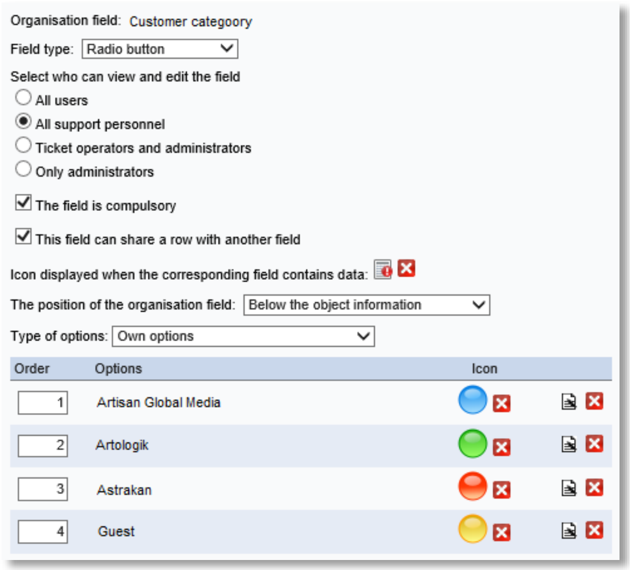
At *New ticket*, *Tickets* and *Search* it is now possible to make a search for object.

New ticket: Click the field *Select object* in order to see the search field. The search is made automatically.
Tickets: Click the field by *Object* in order to see the search field. The search is made automatically. Please note this is only possible is the setting *Allow ticket operators to change object on their tickets has been activated*.
Search solution > Search: Click the search field by *Object*. The search is made automatically.

Show information for *Organisation field* and *User field* in the ticket list

It is now possible to show information from *Organisation field* and *User field* in the ticket list and those who wish can also show icons for these in the list.

Go to *Administration* > *Organisations* > *Organisation fields/User fields* in order to make the icon setting.

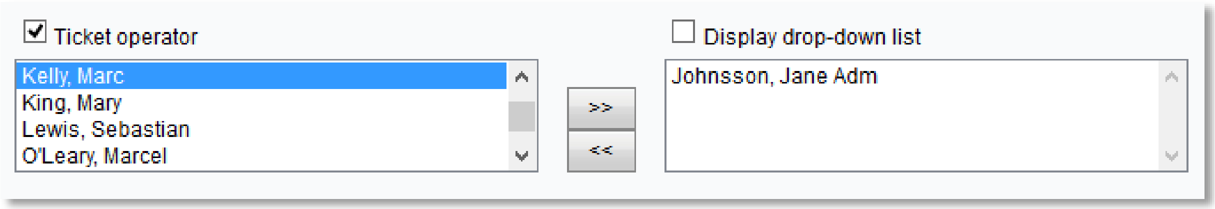


Under *Administration* > *Program settings* > *Ticket list* you set whether *Organisation field/User field* should be shown in the ticket list, as well as specifying which fields should be shown.

Make multiple option selection for ticket operators in the ticket lists

In the tickets lists you now have the possibility to select several ticket operators and not as before merely one or all.

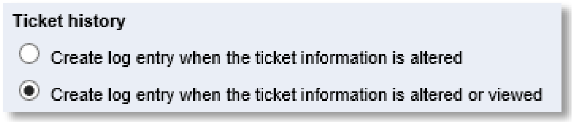
By un-marking the checkbox by *Display drop-down list*, you can select several ticket operators. You make your selection by marking the names and clicking the arrow pointing to the right.



Log of when someone not handling a ticket views it

Under *Administration* > *System settings* > *Advanced* > *General* > *Ticket history* there is a new setting making it possible to choose which information shall be displayed under the ticket history-tab.

Until today HelpDesk has logged information about actions such as "ticket created", "ticket opened" and "E-mail sent". With the new setting you can choose to also log information about when a ticket is viewed by a user that is not handling it. In the report *Ticket history* it is possible to make a selection of log type, which means you can, for instance, show who has viewed a ticket handled by someone else. This is done under *Selection* > *Type of event*.



FAQ

Administrate the search result in the public FAQ search page

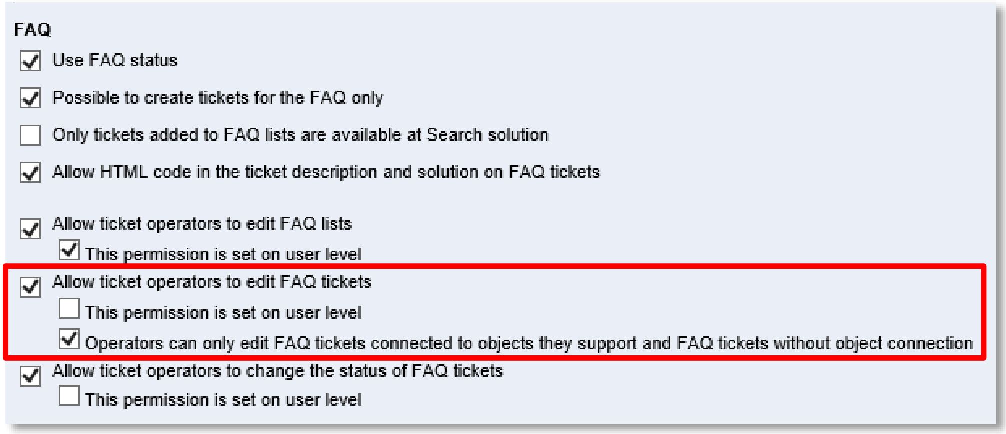
For the public FAQ search page you can now set the headlines, and the order of the headlines, for your search result page.

The setting is made under *FAQ Administration* > *Public search page* > *Search result*. Mark the headings you want to be visible, select preferred sort order and define maximum length if needed.

Create FAQ tickets and connect to objects

You can now create FAQ tickets and connect these to objects, without – as previously – having to create new tickets. Go to *FAQ tickets* and click *New FAQ ticket* on the upper right corner of the page.

A setting has also been added, allowing you to set if ticket operators should be allowed to edit FAQ tickets for all objects, or merely the objects they can give support on. You make the setting under *Administration* > *System settings* > *Advanced* > *General* > *FAQ*: mark the check box by *Allow ticket operators to edit FAQ tickets*. If you only want them to only be able to edit tickets connected to objects they support, you also mark the additional check box *Ticket operators can only edit FAQ tickets connected to objects they support and FAQ tickets without object connection*. See next page.



Only show FAQ ticket headlines with entered information

The FAQ ticket now only shows headlines where there is entered information – i.e. headlines under which no information has been added will not be visible in the ticket information.

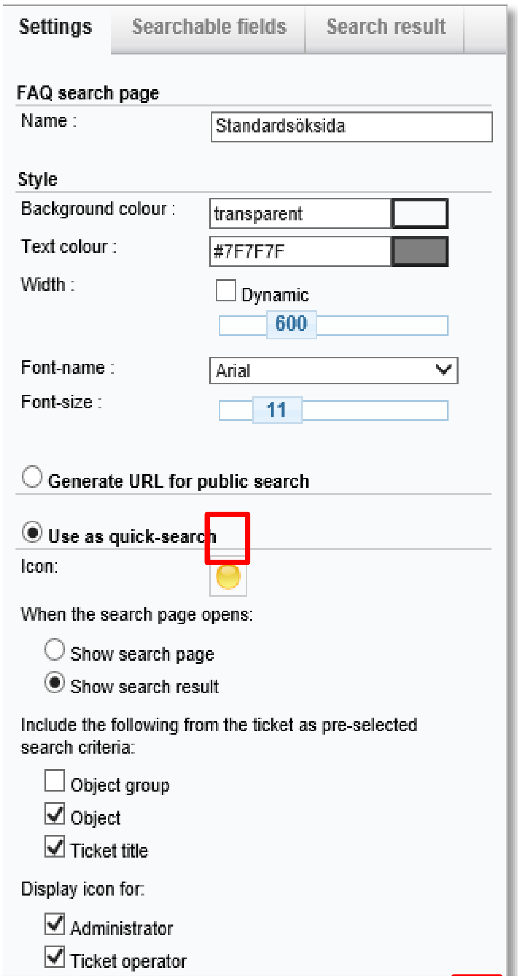
Quick link to the FAQ for support members

In order to use the quick-search FAQ, you go to *FAQ administration* > *FAQ search page* in the left side menu. Under *Settings* > *Use as quick-search* you define your quick-search page and click *Save*.

The selected icon will then be shown in the page footer, amongst the other quick links.

You can define if you want to see the selection or the result of the FAQ search. You can also set whether or not information, such as for example object for the ticket you are working with, automatically should be made a search criterion.

New is also the possibility to from within the FAQ ticket insert ticket description and/or solution into the ticket you are working with. You can also open a new message with an inserted solution.



Change object for FAQ ticket

It is now possible to change objects for the tickets in the FAQ.

Go to the *FAQ administration* > *FAQ tickets* and select the ticket you wish to edit. Select a new object in the section list by *Object*.

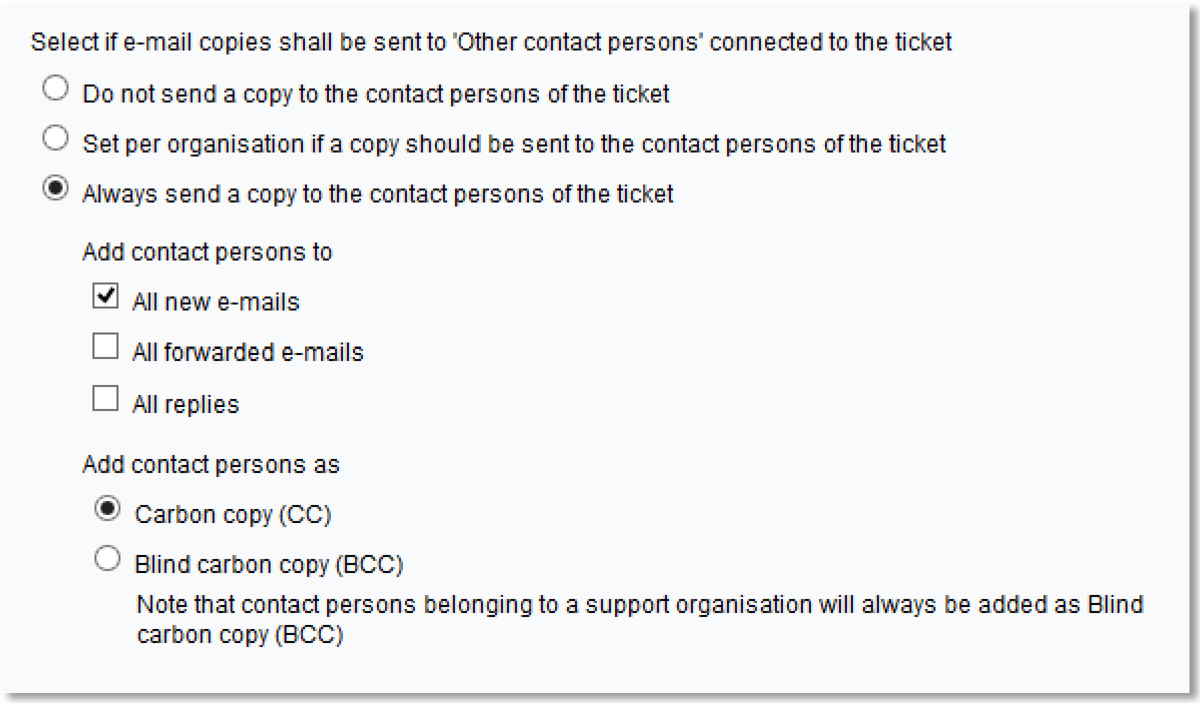
Please note: This is only possible for manually added FAQ tickets.

E-mails

Automatically send copies of e-mails to other contact persons of a ticket

For tickets where there is other contact persons defined, you can choose if an e-mail copy should be sent to these. The copy is either sent as an ordinary copy CC, or as a secret copy, a BCC, and is thus not visible to the recipient.

The setting can be made either generally, for all e-mails and extra contact persons, or set per organisation.



Embedded files/images in the e-mail at *Forward* or *Answer*

If you forward or answer an e-mail with embedded images and/or files, these are kept in the message.

Show *Receiver/Sender* in the ticket

Who sent the e-mail, and who is the recipient? This information can now be found directly in the ticket.

This information is only visible to ticket operators, not the customers.

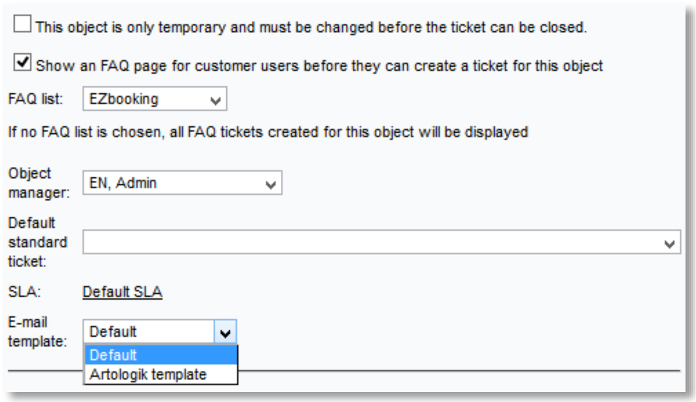
List all messages in a ticket

If working in a ticket where there are several messages which I would like to get a quick overview of, I can click the button *List all messages* under the headline *E-mails and messages*. By doing so all messages will be shown after one another in a new window.

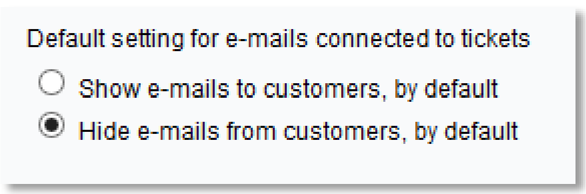
Connect e-mail templates to objects

You can create templates with different receipt and closure information and connect these templates to the different objects. By doing so the different e-mails can be adjusted so that its content is more object specific.

The templates are created under *Administration* > *E-mail settings* > *E-mail templates* and these are connected to each object under *Administration* > *Object administration* > *Objects*. Select preferred template in the drop-down list by *E-mail template*.



Hide e-mails from customers by default



Under *Administration* > *E-mail settings* > *Settings* you are able to decide if e-mails should be hidden from customers by default. However, even if the radio button next to *Hide e-mails from customers, by default* is marked, the messages written inside the ticket itself by customers will show.

New icon for connecting a new e-mail to an existing ticket

When you connect incoming e-mail to existing tickets, you are able to view the matching tickets from your search before connecting the e-mail to a specific ticket.

Click the icon  next to the selection list *Ticket number* in order to open the matching ticket.

We have also made it possible to search a ticket by entering the ticket number, and also at this point you are able to view the ticket before connecting the e-mail to it.

E-mail rules: Search for user match

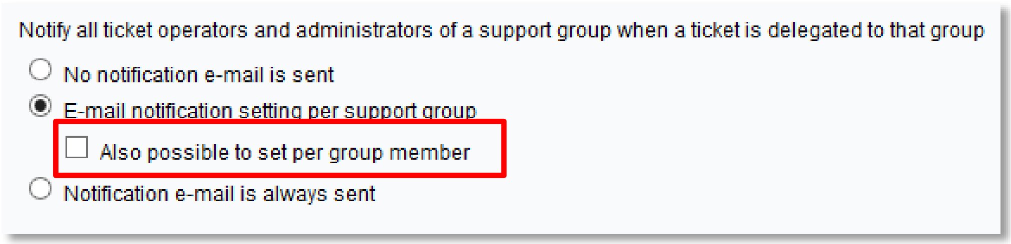
If no match can be found for incoming e-mails, or if several users send e-mails from the same e-mail address, you can per e-mail rule select if the e-mail should be placed in incoming e-mails or if it should be registered for another user. Please note this is only applicable when you have marked *No pre-selected user* under *Administration* > *E-mail settings* > *Settings*.

HD-Advanced

Define per support group how e-mails should be sent upon delegation

Should a support group be informed of a delegation via e-mail? This is now possible to define per support group. Activate the setting under *Administration* > *E-mail settings* > *Settings* where you mark *E-mail notification setting per support group* under *Notify all members of a support group when a ticket is delegated to that group*. Using this setting, you are able to mark the checkbox *Send e-mail to all ticket operators of the group when a ticket is delegated to the group* under *Administration* > *Support groups* > *Basic information.*

You could also set the notification per member in the support group. Under the same tab for e-mail settings, mark the checkbox *Also possible to set per group member*. Se red box in the picture below. The page for basic information of support groups will show to radio buttons instead. Choose between *Send e-mail to all ticket operators…* and *Send e-mail to selected ticket operators*… If you select the latter, you can by marking checkboxes in the member list specify which support group members who will receive the notification.



Extended rights for ticket operators with administrative rights

We have extended the rights for ticket operators who have limited customer rights. They can now create new organisations within the organisation groups they administrate, or within organisation groups connected to their support groups.

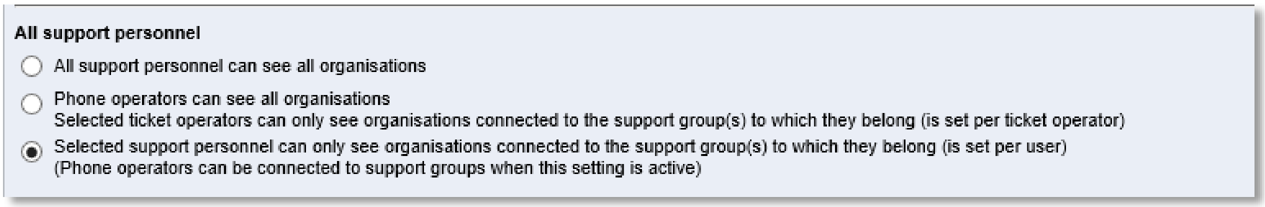
It is also possible for ticket operators who have the right to create customer users, to change organisations for customer users.

Ticket operators who have the right to administer both support groups and organisation groups, can also select which customers are connected to their support groups.

Select which customers a phone operator can see

You now have the possibility to limit which customers a phone operator can see and you do so by connecting the phone operators to support groups with limited “customer rights”. The setting is made under *Administration* > *System settings* > *Advanced* > *User rights*.

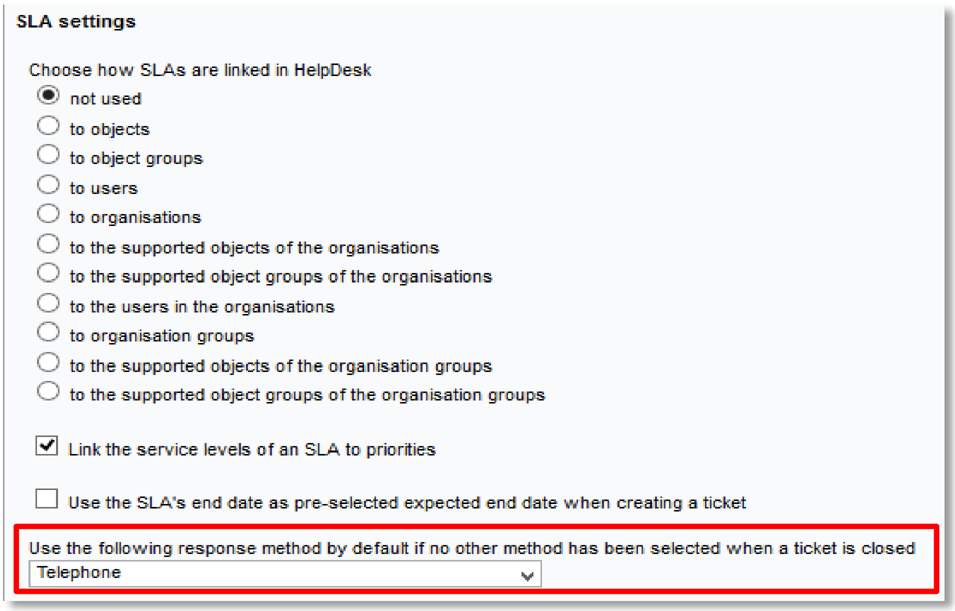
Mark the radio button by *Selected support personnel can only see organisations connected to the support group(s) to which they belong (is set per user) (Phone operators can be connected to support groups when this setting is active.)*. When this setting has been made you can go on and connect the phone operators to support groups.



Set Default response method for SLA

You can choose to set a method of response as default for the SLA. This means that the selected response method will be set automatically if you do not choose any other alternative before closing the ticket.

The setting is made under *Administration* > *SLA administration* > *Settings*; mark the check box by *Use the following response method by default if no other method has been selected when a ticket is closed*, and select preferred option. Then click *Save*.



External ticket operator

We have created a new user type, External ticket operator, which makes it possible to delegate a ticket via a one-time active link. By clicking this link the external ticket operator comes straight to the ticket without logging in. Nothing except the ticket itself is shown, ergo either ticket list, FAQ or anything else is shown.

It is also possible to define which parts of the tickets that should be visible, consequently only showing specified fields. This setting is made under *Administration > Application settings > Ticket form*.

Order	Tab	Column: Left	Column: Right	Section	Hidden for external ticket operators
1	Basic info	○	●	Associated ticket(s)	☑
2	Basic info	○	●	SLA	☑
3	Basic info	●	○	Status	☑
4	Basic info	●	○	Ticket description	☐
5	Basic info	●	○	Other contact persons	☑
6	Basic info	●	○	Map	☐
7	Basic info	●	○	Attached files	☑
8	Basic info	○	●	Ticket relations	☑
9	Basic info	○	●	Classification	☑
10	Basic info	○	●	Classification	☑
11	Basic info	○	●	Products	☑
12	Basic info	○	●	Asset	☑
13	Basic info	○	●	Questions and Answers	☑
14	Basic info	●	○	Questions and Answers	☑
15	Basic info	●	○	Questions and Answers	☑
16	Basic info	●	○	Questions and Answers	☑
17	Basic info	●	○	Questions and Answers	☑
18	Basic info	○	●	E-mail	☐
19	Basic info	○	●	Actions	☐
20	Basic info	○	●	Solution	☐

The pop-up which is shown when a ticket is closed is not editable for external ticket operators. This means that if, for example, the default setting is that e-mail should be sent to the customer, this cannot be changed by the user.

Show e-mails for Parent ticket in the e-mail list

In the e-mail list of child tickets, you can now see e-mails and messages which have been sent to their respective parent ticket.

These e-mails and messages are indicated by the icon  and can be found under the heading *E-mail from parent ticket* in the list.

E-mails and messages

Date	Status	Subject	Sender	Recipient	Hide
2015-09-30 09:47	Sent	*DEV EZ-14-10-22:008-1* test Anonymous	"Supportdesk" <helpme@artologik.net>	jennie.ohlsson@artisan.se	☑

E-mails from parent tickets

Date	Status	Subject	Sender	Recipient
2015-09-30 09:51	Received	**SV: *DEV EZ-14-10-22:008* test Anonymous** (from ticket EZ-14-10-22:008)	Jennie Ohlsson <jennie.ohlsson@artisan.se>	"Supportdesk" <helpme@artologik.net>
2015-09-30 09:49	Sent	*DEV EZ-14-10-22:008* test Anonymous (from ticket EZ-14-10-22:008)	"Supportdesk" <helpme@artologik.net>	jennie.ohlsson@artisan.se
2014-10-22 10:47	Sent	*DEV EZ-14-10-22:008* test Anonymous (from ticket EZ-14-10-22:008)	"Supportdesk" <helpme@artologik.net>	florent.blin@artisan.se

New message | Send PDF | Send receipt

Allow ticket operators to see all tickets for objects they give support

Under *System settings* > *Advanced: User rights* > *Ticket operators* you can choose to mark the check box *Allow ticket operators in selected support groups to view all tickets for objects they support*.

With this setting you allow support users from selected support groups to see ALL tickets registered for objects that they are allowed to give support for, even though they do not have the right to see tickets handled by other support groups.

This function enables these ticket operators to for instance check up on a ticket in case a customer contacts them again, after the ticket operator delegated the ticket to another support group.

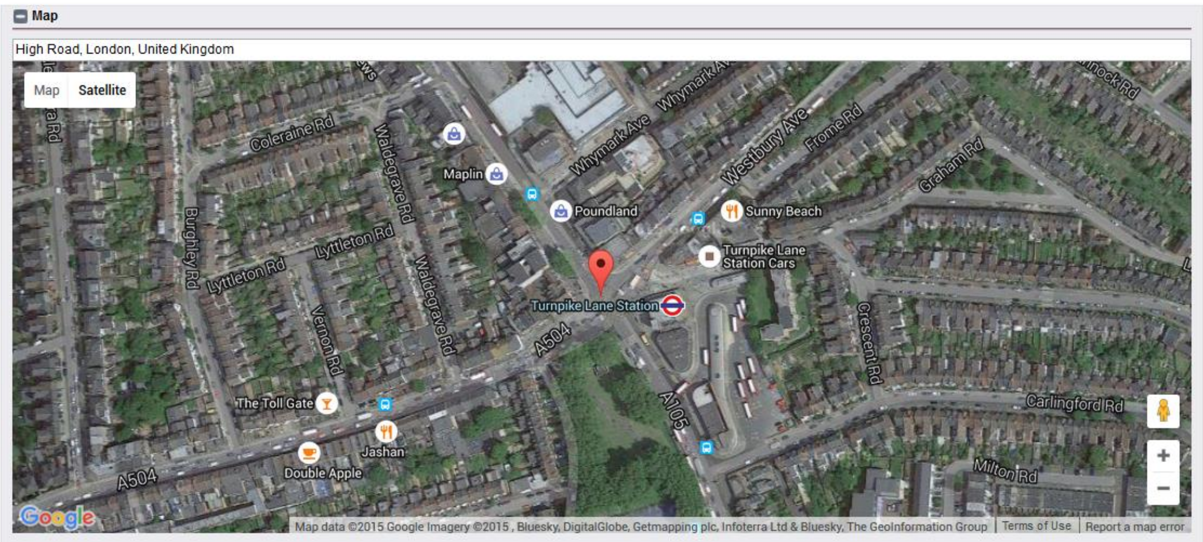
Allow ticket operators to see tickets which they have registered themselves

Under *System settings* > *Advanced: User rights* > *Ticket operators* you find a new setting; *Allow ticket operators to see all tickets they have registered*. By using these setting you make it possible for your first line support to follow tickets which they have registered and then delegated, even if they are in actuality not entitled do so.

HD-Map

Search address

We have made it possible to do searches for specific addresses in HD-Map. Type the address in the search field above the map and the search is automatically performed.



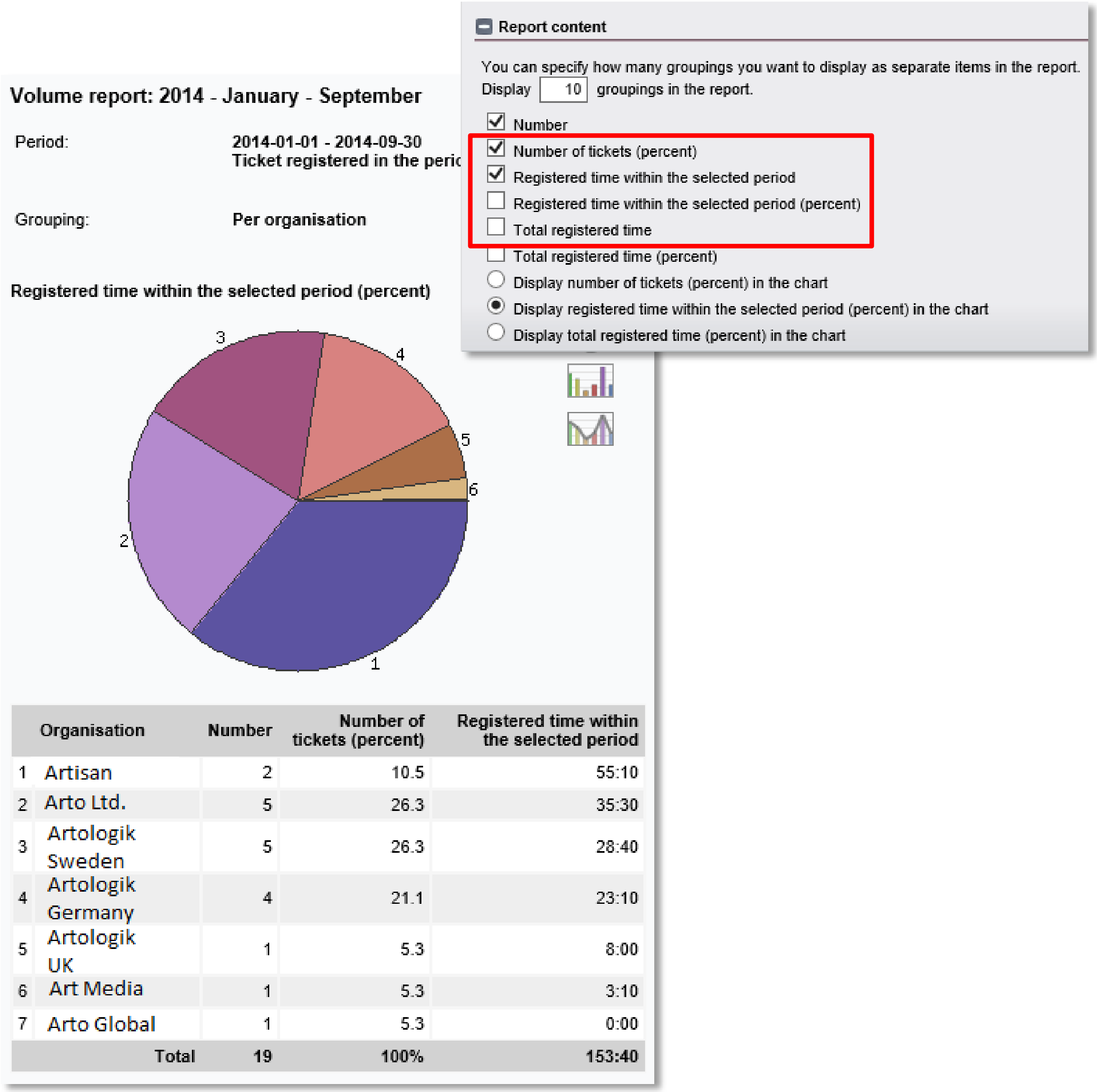
Mark a place on the map

Apart from marking an area, you can now also mark a place in HD-Map. This gives you a more specific spot for the occasions when this is needed.

HD-TIME

Show registered time in the Volume report

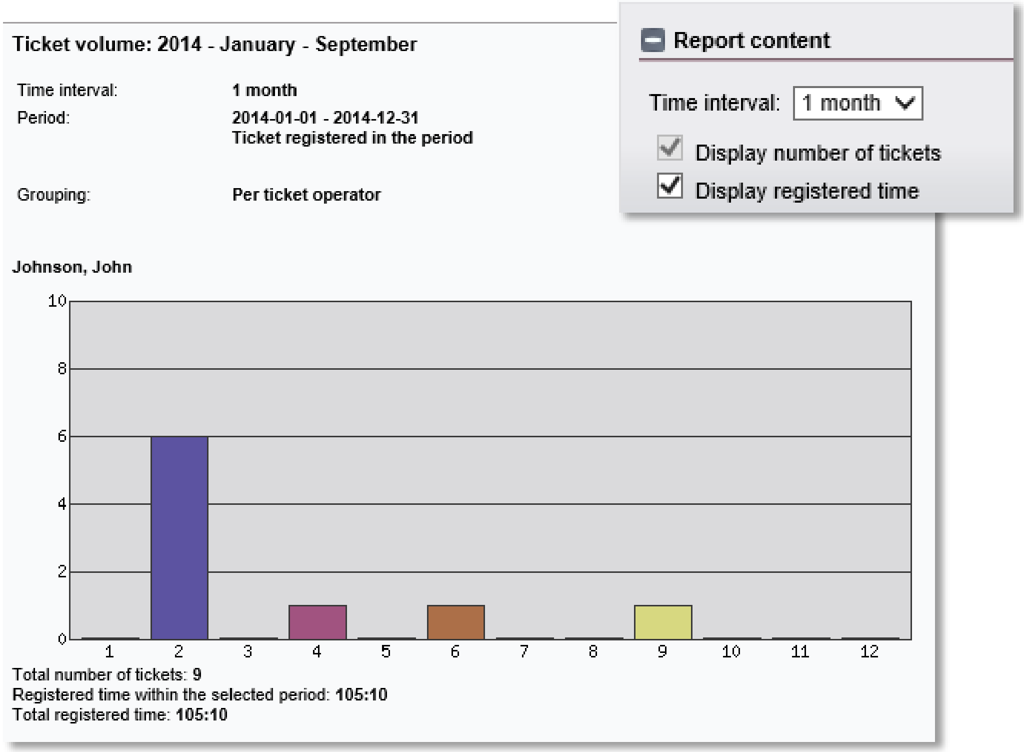
We have made four options to show *Registered time* in the *Volume report; Registered time within the selected period*, *Registered time within the selected period (percent)*, *Total registered time* and *Total registered time (percent)*. Mark your choice(s) under *Report content* when creating your report.



	Organisation	Number	Number of tickets (percent)	Registered time within the selected period
1	Artisan	2	10.5	55:10
2	Arto Ltd.	5	26.3	35:30
3	Artologik Sweden	5	26.3	28:40
4	Artologik Germany	4	21.1	23:10
5	Artologik UK	1	5.3	8:00
6	Art Media	1	5.3	3:10
7	Arto Global	1	5.3	0:00
	Total	19	100%	153:40

Show registered time in the Ticket volume report

For those wishing to show registered time in the *Ticket volume report*, we have now enabled the setting. Click *Display registered time* in order to show this in the report.



HD-Track

Select who can view and answer product questions

It is now possible to decide who should be able to view and answer product questions. Under Select who can view and answer this question under Administration > Product administration > Product question you mark the radio button by either of the selectable options: *All users*, *All support personnel*, *Ticket operators and administrators*, *Only administrators* or *Members of the support groups selected below* (mark preferred support groups below). Click *Save*.

The question will now only be visible for the users specified.

HD-SR: New plug-in

This is how it works

HD-SR is a new plug-in bringing together Artologik HelpDesk and Artologik Survey&Report. The plug-in enables you to connect Survey&Report to your support software and by doing so making it possible to send surveys to your support customers that have registered tickets. The survey could, for example, be regarding what they thought about the support given.

The different settings in HelpDesk allow you to specify the rules regarding when and to whom the surveys will be sent. Users (or respondents, as they are called in Survey&Report) are collected from HelpDesk based on the rules stated. The survey itself is constructed in Survey&Report and it is also there the responses are collected for further analysis.

HD-SR in Survey&Report

In Survey&Report we start by constructing the survey. Apart from constructing the survey and its questions, you select publishing period, survey category, whether or not respondent categories should be used, to mention a few of the possible settings. You also create the mailings which are to be sent to the users/respondents, inviting them to take part in the survey. By creating a *First mailing* you make sure respondents connected to the survey later on will also receive the information.

HD-SR in HelpDesk

Under *HD-SR* > *Administration* you select which surveys should be available to the rules you create, as well as set how often the activated schedule should be run.

Under *HD-SR* > *Rules* you create your rules, which can be either recurring or one-time rules. In the rules you specify to whom the surveys will be sent: by filtering out tickets connected to selected organisations and/or objects (with HD-Advanced also organisation groups and object group) the users that these tickets have been registered for can be added as respondents to the selected survey. In the rules you also specify when the surveys will be sent and how often a user will receive the survey: 1 transfer/ticket, 1 transfer/user or 1 transfer/organisation. Mark the checkbox by *Activate this rule*.