HelpDesk

ISO 27001

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SOFTWARE FOR THE WEB

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General

New theme – ArtMetro

In this version, we introduce a new theme – *ArtMetro*! This theme has a modern look with new colours and design.
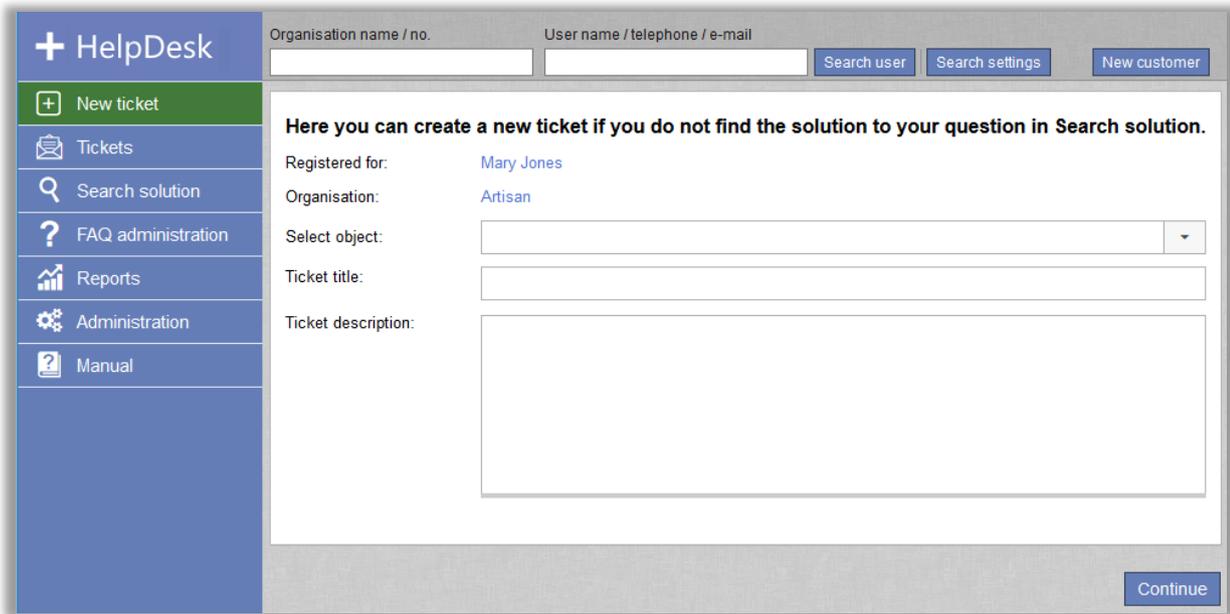
Your theme will automatically be changed to *ArtMetro* after the update. (The old "classical" themes will no longer be available in the program.)
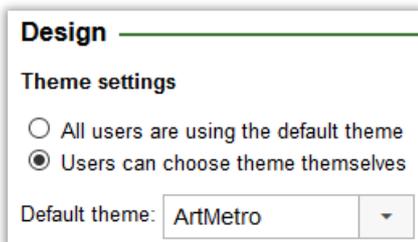
Remove old tickets automatically

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 24 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*.

Password policy

You can now activate a setting which means that the users' passwords must meet certain requirements. This setting is found under *Administration > System settings > Advanced > General > Password policy*. Select the option *Set password requirements* and tick the checkbox next to the requirements you wish to use.

- Minimum password length (enter number of characters)
- Personal information may not be a part of the password
  - The <u>whole</u> first name, last name, phone number, e-mail address or user name may not be included in the password. For example, a user with the first name *Mary* cannot have the password *mary123* or *123mary*.
  - If a <u>part of</u> the first name, last name, phone number, e-mail address or user name is included in the password, the password must contain at least one other character. For example, a user with the last name *Robinson* cannot have the password *robin*, but the password *robin123* would be valid.

  Character restrictions
- Minimum number of digits (0-9)
- Minimum number of capital letters (A-Z)
- Minimum number of lowercase letters (a-z)
- Minimum number of special characters
- Maximum number of times the same character can be repeated consecutively

If you activate more than one of the character restrictions, you can decide if all of them, or only a number of them, must be met.

Password policy

○ No password requirements

◉ Set password requirements

☑ Minimum password length: `8` characters

☐ Personal information may not be a part of the password
(first name, last name, phone number, e-mail address, user name)

Character restrictions

☑ Minimum number of digits: `1`

☑ Minimum number of capital letters: `1`

☑ Minimum number of lowercase letters: `1`

☑ Minimum number of special characters: `1`

☐ Maximum number of times the same
character can be repeated consecutively:

Number of the above character restrictions that must be met: All ▼

The password policy must be met when:

- a user logs in to the program.
- a user's password is changed in the user profile, by the user himself/herself or by another user.

When a user tries to log in to the program with a password that does not meet the password policy, he/she will have to update the password before being able to log in. By clicking the link *Password policy*, the user can see the password requirements.

Your password does not meet the password policy. You will have to update your password before proceeding to the application.

Password policy

Password requirements: ✕

- At least 8 characters long

Must meet the following character restrictions:

- Must contain at least 1 digits
- Must contain at least 1 uppercase letters
- Must contain at least 1 lowercase letters
- Must contain at least 1 special characters

User name: mary

New password:

Retype password:

Change password   Cancel

Tickets

Possible to attach several files at the same time

When you attach files to a ticket or to an e-mail, you can now attach several files at the same time. We have also changed the interface for attaching files. Instead of a *Browse* button, you have now access to this area:

Drop files here, or click to select files manually
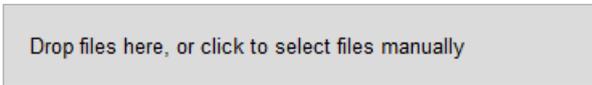
You can use this area in two ways:

- Click the area and select files in the window that opens
- Drag files to the area and drop them there
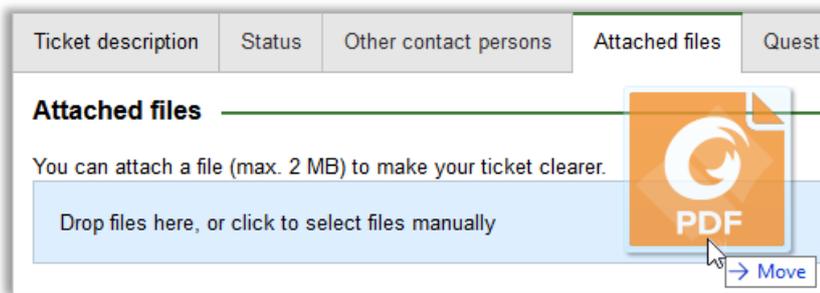
Logging when the ticket description is changed

Under the *History* tab on a ticket you can see a log of what has happened on the ticket. If the ticket description has been changed, you can now compare the previous ticket description with the new one to see what has been changed.
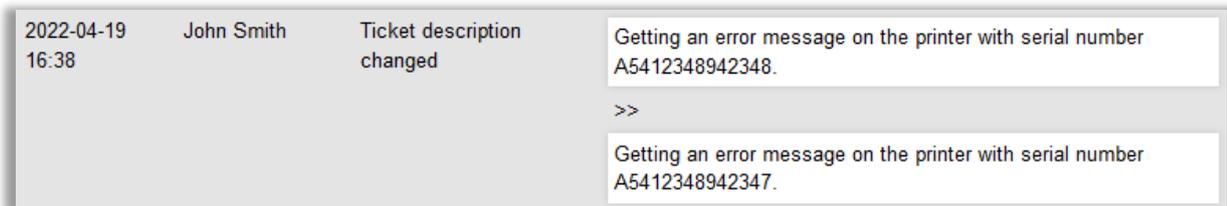
To see the logging of the ticket description you can also click the *History* link next to the heading *Ticket description* in the ticket form.

Possible to expand the ticket description field when registering a new ticket

If you need to write a lot of text in the ticket description field when registering a new ticket, you can now expand the field to make it big enough for all text to be visible.

Place the cursor over the bottom border of the field. When the cursor changes to a "resize" cursor (highlighted below), you can drag to expand the field to the size you prefer.
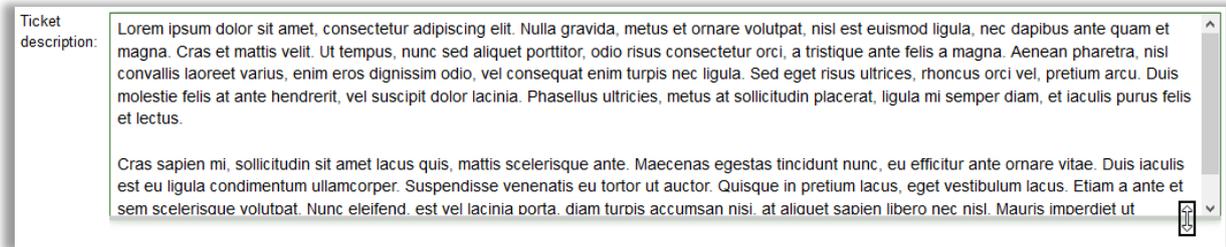
Possible to show the tickets of organisations displayed in the New ticket user search

It is now possible to view all tickets of an organisation after searching for that organisation in the *New tickets* menu. This can be useful if you are about to register a ticket, but you want to make sure that a ticket concerning the same issue has not already been registered for the organisation.

Directly after you have searched for an organisation/user, you can click the *Show tickets* button next to an organisation to list all tickets, regardless of status, registered for that organisation.

To go back to the listing of users, you click the *Show users* button.
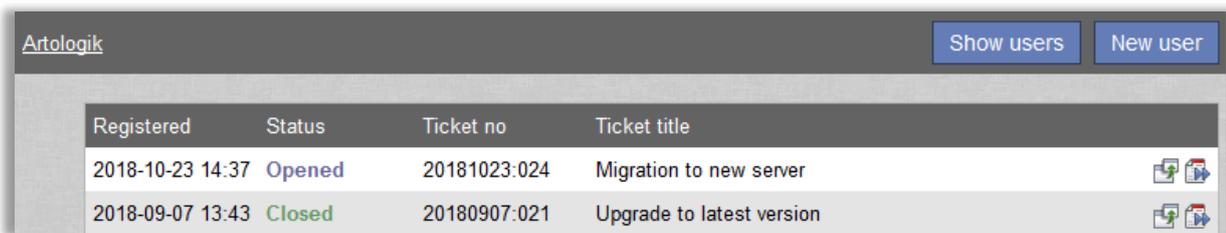
Save mail attachments as ticket files and attach all ticket files as mail attachments

We have added a couple of functions which makes it easier to attach ticket files as mail attachments, and to save mail attachments as ticket files.

If you open a received e-mail which has one or more attachments, you can click the *Save all files as ticket attachments* button to save the files under the heading *Attached files* in the ticket form.
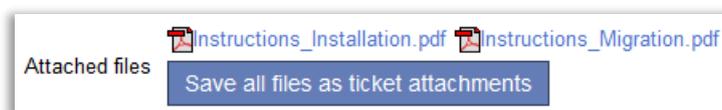
Previously, you have been able to attach ticket files to e-mails you send, one by one. You can now attach all ticket files at the same time. After clicking 📎 at *Attachments* in the e-mail, you select *Attach ticket file* and click the button *Attach all files*.
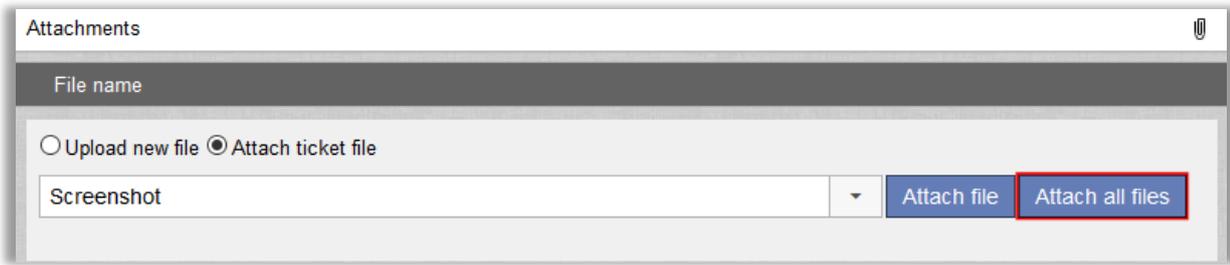
Adding e-mail contacts as recipients

When you handle a ticket, you can add *Other contact persons* to the ticket. You can add users from the organisation the ticket is registered for, but you can also add an e-mail address as *E-mail contact*.
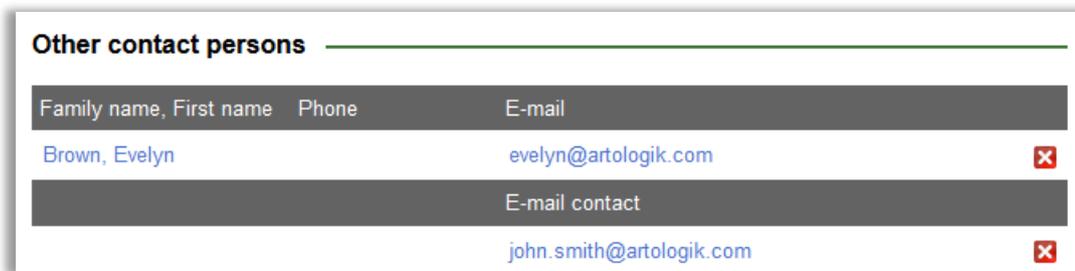
When you create a new e-mail, you can click the 🖼 symbol next to the *To*, *CC* or *BCC* field to add recipients from different mail lists. One of the mail lists is *Contact persons for the ticket* and in that list, the e-mail contacts are now included.
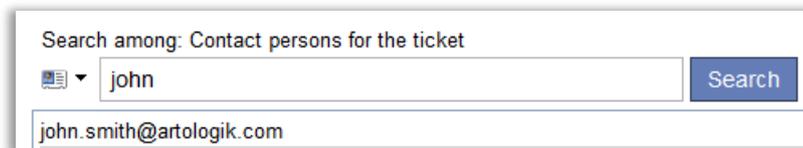
Change a user's organisation from a ticket

When you create or handle a ticket, you can click the 'registered for' user's name to view and edit his/her user information. In this edit window, you have now access to the *Change organisation* button. Click this button to move the user to another organisation.
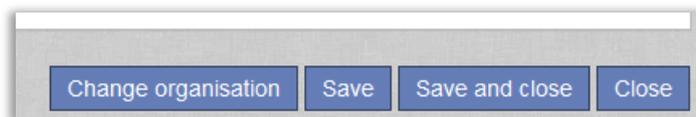
Notification if something has been changed

While you are working with a ticket it might happen that someone else, the customer or another operator, edit certain parts of the ticket. If this has been done since you last started working with the ticket, you will now be notified that something has been changed, and by whom, when you save the ticket.

The notification will be displayed if someone has:

- Changed priority
- Changed expected start date
- Changed expected end date
- Edited the anonymous user's details
- Changed the ticket description
- Changed the solution
- Sent an e-mail to the ticket
- Left a message on the ticket
- Saved the ticket
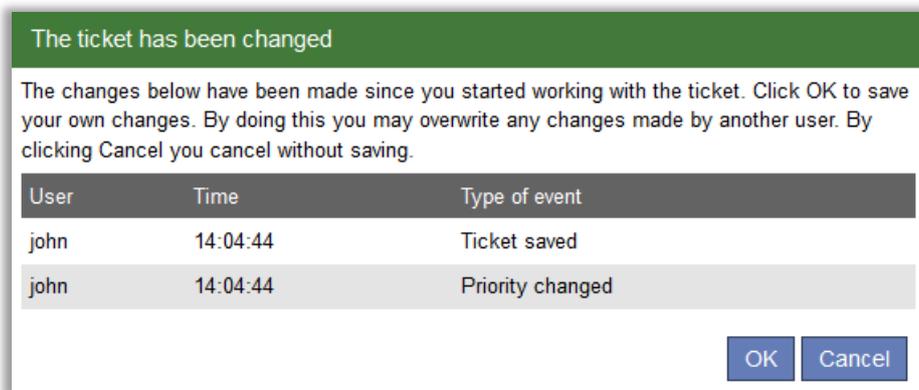
If you click *OK* you save the ticket, and any changes saved by someone else may be overwritten. By clicking *Cancel* you cancel without saving.

Include answers to questions when a ticket is copied

When you are working with a ticket, you can click the 🔴 icon in the *Status* section to create a new ticket based on the current ticket. Which information will be copied from the original ticket depends on a setting you find under *Administration > System settings > Advanced > General > Register ticket*. We have now added the possibility to copy question answers from the original ticket to the new ticket.
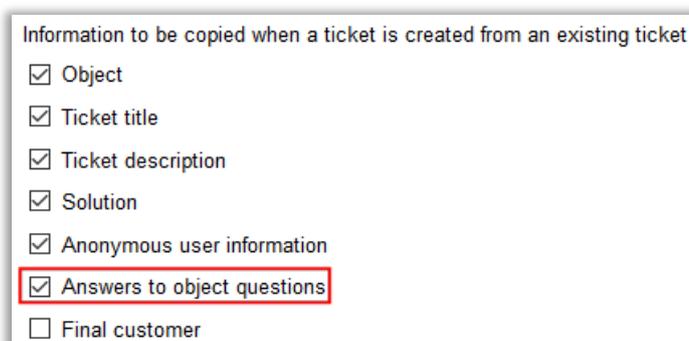
Please note that the question and its answer is not copied if the question has been deleted from the question pool, or if the question is no longer connected to the ticket's object.

Include images when printing or exporting a ticket

If you have attached images to the ticket, they can now be included when the ticket is printed or exported to PDF. To achieve this, you activate the setting *Print images for the ticket* under *Administration > System settings > Advanced > General > Functions*.

In the print or export, the file name of the image will be listed, and below that the image itself. This applies to images of the types .jpg, .gif, .png and (only in Internet Explorer) .tif and .tiff.
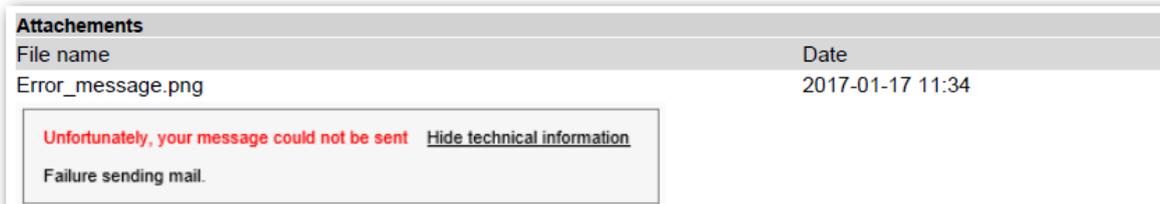
Search

Possible to search among e-mails

Sometimes you might want to search for a ticket where you know that a certain text appeared in an e-mail sent to or from the ticket. This is now possible under *Search solution > Advanced search*. Tick the check box at *E-mail* under *Search fields* and type the desired text in the *Search text* field.

The e-mail search is only available for the support personnel and it will be performed in the sender address, recipient address, CC address, subject and body of all e-mails connected to tickets.

Reports

New report type: Organisation report

The new report *Organisation report* can be used to show a list of the desired organisation information for a selection of organisations. The report is available for administrators and, in HD-Advanced, for ticket operators who have the right to administer organisation groups.

In the edit mode of the report you can use the following selection criteria: *Support objects*, *Organisation group*, *Type of organisation* (support organisation, customer organisation, final customer, or final customer and customer organisation), *Status* (active or inactive) and content in *Organisation fields*.

In the image below, you can see what report content you can choose to show in the report. When it comes to organisation fields, you can show all fields or selected fields.

Report content

By selecting optional variables you can create a report suited to your own needs. For one headline row, you pick variables for Row 1. For two headline rows, you pick variables both for Row 1 and Row 2. Select the number of rows you want.

Number of rows: 1

Heading interval: 0

Variables
- Organisation ID
- VAT-no
- Customer number
- Phone
- Fax
- Address
- Zip code
- Town
- Country
- Visiting address
- Visiting address: zip code
- Visiting address: town
- Visiting address: country
- First support group
- Default object group
- Default object
- Extra information
- Status
- Support objects
- Users

Row 1:
- Organisation
- Organisation group
- Type of organisation
- Organisation fields

>> <<

Organisation fields
- ○ All
- ◉ Select fields
  - ☐ Customer category
  - ☐ Responsible sales person
  - ☑ Contact person

When you show the report, the organisations are displayed as rows and the report content as columns. The report can be printed or exported to Excel.

Organisation ▲	Organisation group	Type of organisation	Organisation fields
Artologik London	Artologik England	Customer organisation	Contact person Smith, John
Artologik Manchester	Artologik England	Customer organisation	Contact person Smith, John

Possible to show ticket information from the Ticket list report

In the report *Ticket list* you can show a selection of tickets and for each ticket show the desired ticket data. If you choose to show *Ticket no* in the report, you can now click a ticket's ticket number to display the whole ticket information in a new window.

Number of tickets: 5

Ticket no ▲	Organisation	Object
20220429:001	Artologik London	HelpDesk
20220429:002	Artologik London	Survey&Report
20220429:003	Artologik Manchester	EZbooking
20220430:001	Artologik London	HelpDesk
20220430:002	Artologik Manchester	HelpDesk

Organisation fields and user fields in the Ticket list report

In the ticket list report, you can now use organisation fields and user fields as selection to find tickets whose "registered for" organisation/user has matching values on the fields you use as selection. In the report's edit mode, you make the selections of your choice by expanding the sections *Selection on content in organisation fields* and *Selection on content in user fields*.

The field values can also be displayed in the report content. After deciding to show organisation fields and/or user fields in the report content, you can choose whether to show all fields or only certain fields. If you select the *Select fields* option, you can mark the check box next to the fields you want to include in the report. See also the section *Show only connected questions/fields in the Ticket list report* further below in this document.
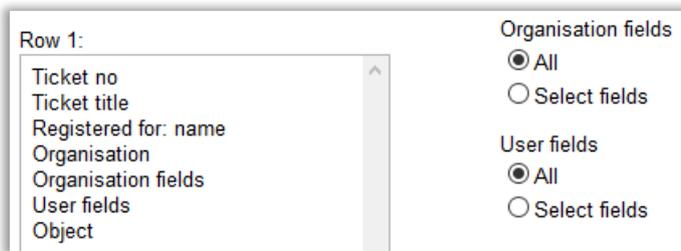
If you export the *Ticket list* report to Excel, the setting *Export format for questions, organisation fields and user fields in the Ticket list report* under *Administration > System settings > Advanced > General > Reports* affects how the fields will be displayed in the Excel file.
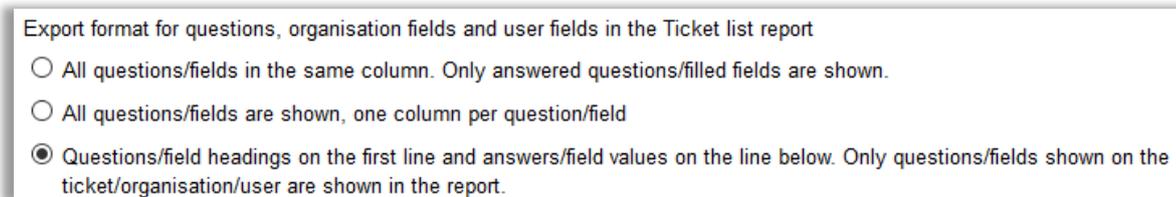
If you use the option selected in the image above, it is recommended that you do not show the fields *Organisation fields*, *User fields* and *Questions&answers* in the same report. The reason is that the system adds a line break after each of those three fields in the Excel file. If you do show other content after one of those fields, that content will be placed in a new row and might hinder the reading flow. With the selected option seen above you should therefore only include one of the three mentioned fields in your report content, preferably as the last/bottom field so that the export file doesn't show any line breaks.

Show only connected questions/fields in the Ticket list report

In the *Ticket list* report, you can show questions and their answers in the report content. After deciding to do so, you can choose to show all questions or only selected questions. If you in the report has made a selection on one or several objects, you will now also have a third option: *All questions connected to the selected objects*.
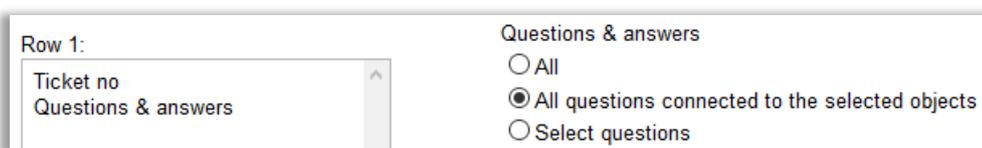
This option is useful if you are planning to export the report to Excel, and if you are using the export format setting *All questions/fields are shown, one column per question/field*. This setting, *Export format for questions, organisation fields and user fields in the Ticket list report*, can be found under *Administration > System settings > Advanced > General > Reports*. If you have this setting and in the report select the option *All questions connected to the selected objects*, the Excel export file will contain one column for each question connected to the selected objects. If you instead select the option *All*, the export file will contain one column for each question in the system.

If you have HD-Advanced, you now have the possibility to connect organisation fields and user fields to organisation groups (this new feature is described further down in this document). If this has been done, and if you in the report have made a selection on one or several organisation groups, you will have the option to show *All fields connected to the selected organisation groups* after deciding to show organisation fields or user fields in the report content. This option works in the same way for organisation fields and user fields as the option *All questions connected to the selected objects* does for questions, see above.

Administration

Connecting objects to standard responses
When you create or edit a standard response you can now at the same time connect it to objects, without having to connect it from the administration of each object.

You can either mark the check box *The standard response is connected to all objects*, or mark the check box next to the objects of your choice under *Objects that the standard response is connected to*.

Possible to make it mandatory to change object before delegating a ticket
When you administer an object, you can now find the setting *A ticket registered on this object cannot be delegated. The object must be changed first*. Activate this setting if you want to make it mandatory to change to another object before it is possible to delegate a ticket registered on this object.

Auto reply per e-mail account
For HelpDesk to be able to automatically connect an incoming e-mail to a ticket, there must be a ticket number in the subject field of the e-mail. In the *Administration > E-mail settings > E-mail autoreply* menu, you decide what shall happen when an

e-mail without a ticket number in the subject is received. We have now made it possible to let different things happen depending on which e-mail account the e-mail was sent to. To activate this possibility, you select the last of these options:

○ Never send automatic replies
○ Always send automatic replies
◉ Choose per e-mail account — Edit settings and message in Administration > E-mail settings > E-mail account

After selecting the option *Choose per e-mail account*, you go to the *Administration > E-mail settings > E-mail account* menu and select an e-mail account. On the page, you find this setting:

Handling of incoming e-mails lacking a ticket number in the subject line

Action   ○ Leave the message in the inbox
          ◉ Send an auto reply to the sender and delete the message
          ○ Send an auto reply to the sender and leave the message in the inbox

[Auto reply message]

If you choose one of the options which means that an auto reply shall be sent to the sender, you decide the content of that auto reply by clicking the *Auto reply message* button.

Settings concerning Actions

Previously, when creating an action, you had always access to the check box *The action was performed*. You were also able to select a user to handle the action. This was made in a drop down list containing all ticket operators and administrators.

Handled by: Smith, John   ▼

Action date: 2022-04-25

Registration date:

Last edited:

☐ The action was performed

☑ Do not show this action to customer

If you do not have need to decide whether an action shall be set to "performed", you can now hide the check box *The action was performed*. You do this by inactivating the setting *Make it possible to specify action status* under *Administration > System settings > Advanced > General > Actions*.

There you also find a setting concerning which users may be selected to handle an action. With the option *All operators* it will work as before, all ticket operators and administrators will be possible to select. If you select the option *Operators in the support group handling the ticket* (only in HD-Advanced)*,* the drop down will contain only the ticket operators and administrators of the support group which is handling the ticket at the moment. If you do not have the need to "delegate" actions to other users you select the option *Only the operator handling the ticket (automatically selected)*.

With the settings above, the check box will be hidden, and no drop-down list will be shown at *Handled by*.

Filtering e-mail rules

If you have created a great number of e-mail rules, you can now use the two drop down lists *Object* and *Support group* to filter the list and show only rules which will create tickets registered for a certain object or delegated to a certain support group.

Organisation and user administration

Possible to let organisations have the same name

Previously it has not been possible to create several organisations with the same name. We have now added a setting which lets you decide whether organisation names must be unique, or if the same name can be used several times. You find this setting under *Administration > System settings > Advanced*.

If you have HD-Advanced you can also choose to let the same organisation name be used several times, but only once per organisation group.

Organisations

Naming of organisations

○ Every organisation must have a unique name

○ An organisation name may be used once per organisation group

⦿ An organisation name may be used an unlimited amount of times

☑ Show a warning when an organisation with the same name as an existing organisation is about to be created or saved

If you select a setting which allows the same organisation name to be used several times, you can activate the setting *Show a warning when an organisation with the same name as an existing organisation is about to be created or saved*.

Organisation: Artologik   *
                 Note that an organisation with the same name already exists.

Merging organisations

We have added a new function which lets you merge two organisations into one. One of the organisations will remain after the merging and the other one will be deleted.

Go to the organisation you want to remain and click the button *Merge organisations…* You then get a list of any organisations matching the name of the organisation you are editing. If you want to search for another organisation, you enter its name or customer number in the search field and click the *Search* button.

Click the button *Merge* next to the organisation you want to disappear after the merging.

ID	Organisation	Phone	Town	Country	Type of organisation	Placement in organisation tree	
230	Artologik				Customer organisation	Main organisation	Merge

Select which information (attached files, child organisations, final customers) you want to move from the organisation which will be deleted to the organisation which will remain. Any users connected to the organisation will always be moved. Click the button *Execute merge*.

Merge organisations ─────────────────────

Move

☐ Attached files

From: Artologik (ID: 230)

To: Artologik (ID: 52)

The "From" organisation will be deleted when the merge is completed.

                                                          Back   Execute merge

Ticket operators who have the right to administer organisation groups have also the right to merge organisations, provided that both organisations belong to the organisation group(s) they administer.

Possible to delete organisations and users

Previously it was only possible to inactivate organisations and users. We have now made it possible also to delete them.

A condition for the possibility to delete an organisation is that no users are connected to the organisation. If you want to delete an organisation with users connected to it, you first have to move these users to another organisation. You do this by using the button *Change organisation* in each user's profile. When no more users are connected to the organisation, you click the *Delete* button in its details.

The *Delete* button is also available in a user's profile. However, there are a lot of things which prevent a user from being deleted, for example if:

- There are tickets registered for the user
- The user has opened tickets
- The user has been selected as *Object manager* for an object
- The user has created questions, organisation fields or user fields
- The user appears in the history log on a ticket or a user

Thus, the function is most suitable for deleting users who have not yet been active in the system. If a user cannot be deleted, you still have the possibility to inactivate him/her.

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 <u>registered for</u> that user will be anonymised as described above. However, nothing will be cleared on tickets <u>handled by</u> 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.

The user role displayed in the list of users

Under *Administration > Organisations > Support organisations* and *Administration > Organisations > Customer organisations* you can list users by clicking the *Search user* button. In this list, each user's user role is now displayed.

Name	User name	Phone ▾	Mobile phone	E-mail	User role
Smith, John	john	0470-53 85 85		john@artologik.com	Ticket operator
Jones, Mary	mary	0470-53 85 85		mary@artologik.com	Administrator

You can sort the list by user role by clicking the heading *User role*.

New menu option: Field settings

Under *Administration > Organisations*, you now find the menu option *Field settings*. There you can, under the tabs *Organisation fields* and *User fields*, decide which fields shall be visible in the organisation details and user details, respectively, and also which fields shall be mandatory to fill when an organisation/user is created or edited.

On the page, the program's standard fields are listed at the top, and below them any organisation fields/user fields that you have created yourselves. Tick the checkbox under the heading *Visible* at the standard fields you want to be available in the details. Under the heading *Mandatory* you tick the checkbox at the standard fields and organisation fields/user fields which shall be mandatory to fill.

Organisation fields	User fields		
Standard fields		**Visible**	**Mandatory**
Organisation group		☑	☑
Organisation		☑	☑
VAT-no		☐	☐
Customer number		☑	☑
Phone		☑	☐
Fax		☐	☐
Address		☑	☐
Zip code		☑	☐
Town		☑	☐
Country		☐	☐
Visiting address		☐	☐
Visiting zip code		☐	☐
Visiting town		☐	☐
Visiting country		☐	☐
Organisation fields			**Mandatory**
Contact person			☐
Service agreement			☑

Save

If you have the plug-in HD-Advanced, you can make specific settings for each organisation group. Ticket operators who have the right to administer organisation groups can make settings for the organisation groups they administer. System administrators can make settings for all organisation groups, and also make a default setting to be applied for organisation groups for whom no specific settings have been saved.

Organisation group
[Default settings] ▼

Organisation group
Artologik England ▼

Organisation fields	User fields	

[This organisation group is connected to the default settings]

After selecting an organisation group in the drop-down list, you can make the settings to be applied for this group. Under the heading *Connected to [name of organisation group]*, the organisation fields/user fields that are connected to the organisation group are listed. You make this connection when you administer a field by specifying whether the field shall be connected to *All organisation groups* or *Selected organisation groups*.

Click the *Save* button to confirm the settings to be applied for the organisation group. If you want to delete the organisation group's specific settings, and let it use the default settings instead, you click the button *Restore default settings*.

File import of users: Decide which fields to update for existing users

When you import users from a file, you can now decide which fields in the user information shall be updated for already existing users included in the import file. This can, for example, be useful if you let your customer users log in to the program and do not want to overwrite the passwords for existing users you import again.

For each field, you decide whether it shall be imported only for new users (select *Only new users*) or also be updated for existing users (select *All users*). Please note that information in fields for which you select *All users* will be overwritten with information from the import file when it comes to users already existing in the system.

Possible to decide which user information to export

Next to the *Search user* button we have now added an icon (highlighted below) which lets you export the users to Excel and decide which user information to include in the export. In addition to the default fields in the user details, you can also choose to export any self-defined *User fields*.
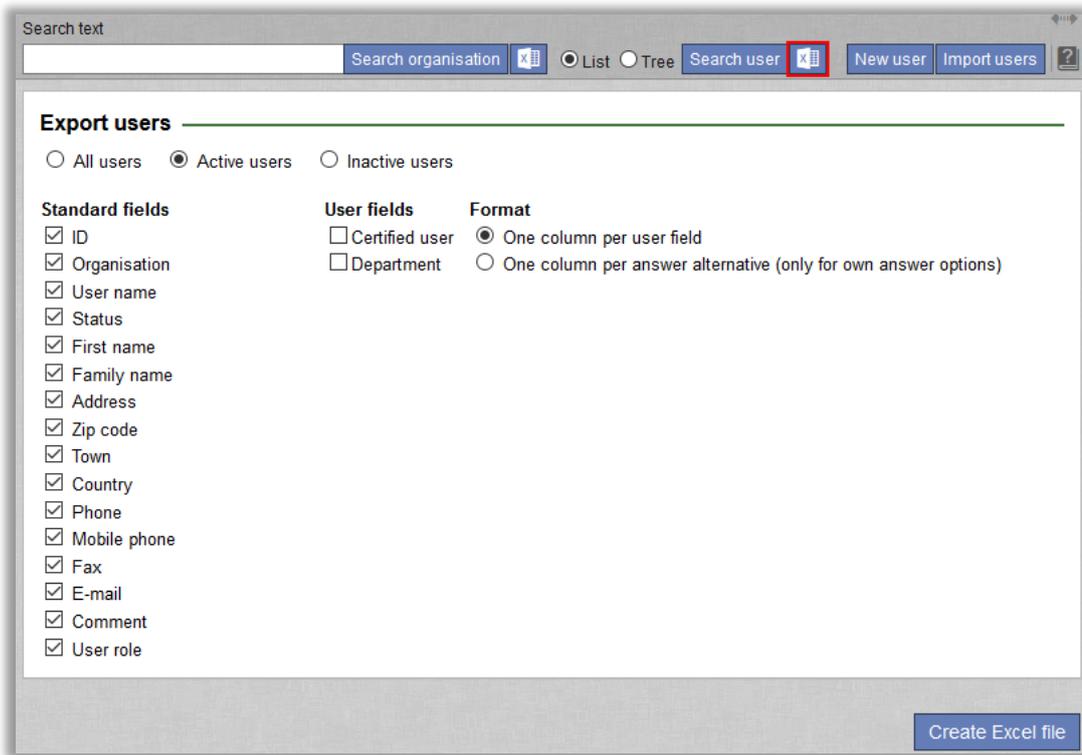
To create the export file, you click the *Create Excel file* button.

Copy support user

If you are going to create a new support user, and want this user to inherit information from another user, you can now create the user as a copy of an existing user.

Go to the user details of the user you want to copy, and click the *Copy user* button.
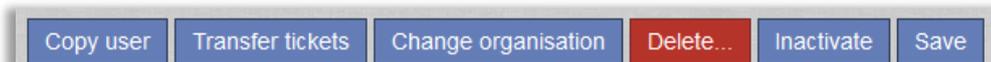
By doing this you begin the creation of a new user, and all information of the original user (except for *User name* and *Password*) are pre-filled on the page. In the *First name* and *Family name* fields the pre-filled text will be *Copy of [the original user's name]*. Change any necessary information, enter a user name and a password, and click *Save* to create the user.

The information that will be copied includes:

- Personal information
- User field information
- Settings and user rights (e.g. additional rights that can be assigned to ticket operators)
- Objects which are supported for the user
- Which support group(s) the user is member of (in HD-Advanced)
- Objects the user is supporting
- Ticket lists
- Which headings are displayed in the ticket list, and in which order
- In which column and in which order sections are displayed in the ticket form

HD-Advanced

Decide per support group whether to show a popup when closing a ticket

When a ticket is closed, a popup can be displayed where you for example can decide if an e-mail should be sent to the customer. We have now made it possible to decide per support group whether this popup shall be displayed.

To enable this, you select the option *Show popup to selected support groups* under *Administration > System settings > Advanced > General > Close ticket*. Then transfer the support groups for whom the popup shall be displayed to the list of *Selected support groups*.

After activating this setting, you can also decide in the support group administration whether the popup shall be displayed for each support group. When you administer a support group you find this setting:

Settings for e-mail receipt and "close ticket e-mail" on organisation group level

In HelpDesk it is possible to activate automatic e-mails to be sent upon registration and closing of tickets. We have now made it possible to decide on organisation group level whether these e-mail shall be sent automatically.

The setting concerning e-mail receipt is activated under *Administration > E-mail settings > E-mail receipt*:

After selecting the option *Select per organisation group whether automatic e-mail receipts should be sent*, you can move the organisation groups whose users shall receive automatic e-mail receipts to the list of *Selected organisation groups*, or go to the desired organisation groups' details and mark the check box *Send automatic e-mail receipts*.

Under *Administration > Application settings > Ticket form*, a default setting is made concerning in which order the sections shall be presented in the ticket form, and whether they shall be placed in the left or the right column when the layout with two columns is used. We have now made it possible to specify these settings also on support group level.

Here as well, you can select that the settings can be activated on organisation group level. After selecting the option *Only if the ticket is registered for one of the selected organisation groups*, you can move the desired organisation groups to the list of *Selected organisation groups*, or go to the desired organisation groups' details and mark the check boxes *Let the ticket operator edit the "close ticket" e-mail before it is sent* and *The checkbox "Send an e-mail to the customer" shall be checked by default when closing a ticket*, respectively.

Specify ticket form settings on support group level

Under *Administration > Application settings > Ticket form*, a default setting is made concerning in which order the sections shall be presented in the ticket form, and whether they shall be placed in the left or the right column when the layout with two columns is used. We have now made it possible to specify these settings also on support group level.

If you, in the administration of a support group, select the option *Use support group specific ticket form settings*, you can then click the button *Edit ticket form*. In the window that opens you can make the desired settings for the sections' sorting order and column location, but also settings concerning the layout of the ticket form (one or two columns, and whether to use section tabs or not). If you unmark the check box *Allow ticket operators to change the layout within a ticket*, the members of the support group will always use the layout you specify for the support group. If the check box is marked, they will be able to change the layout on tickets they handle, and you can then decide whether their latest choice of layout, or the support group's default layout, will be pre-selected when they open a ticket.

- ○ Show the info in one column
- ● Split up the info into two columns
- ☑ Split up the info in section tabs
- ☑ Allow ticket operators to change the layout within a ticket
    - ● Let the user's last selected layout be pre-selected
    - ○ Always let the support group's layout be pre-selected

If a ticket operator is member of several support groups, the setting for the support group which is currently handling the ticket will be applied.

Connect organisation fields and user fields to organisation groups

When you create or edit an organisation field or a user field, you can now connect it to selected organisation groups. The field will then be available only in the details of organisations/users belonging to these organisation groups.

Organisation groups, which the field is connected to
- ○ All organisation groups
- ● Selected organisation groups

Available organisation groups		Selected organisation groups
Artologik France Artologik Spain Artologik UK	>> <<	Artologik Germany Artologik Sweden

Improvements for Quick-case tickets

The Quick-case function is suitable for simple tickets which can be closed immediately upon registration. We have made some changes to the function that makes it easier for you to register several, identical quick-case tickets consecutively.

- After closing a quick-case ticket, you will now automatically return to the *Quick-case* menu, provided that the option *New ticket* has been selected on the setting *Continue to the following menu option after a ticket has been closed*, under *Administration > System settings > Advanced > General > Close ticket*.
- The quick-case ticket you selected the last time will automatically be selected.

Keep the object tree expanded/collapsed as before editing an object

When you go to *Administration > Object administration > Objects* you can expand and collapse the object groups and objects by clicking ⊞ and ⊟ respectively. If you edit an object and after that go back to the object tree, by clicking the button *Show object structure* or by clicking the *Objects* menu, you will now find the object tree expanded/collapsed as it was before you edited the object.

Possible to exchange messages between parent and child tickets

We have added the possibility to exchange messages between parent tickets and child tickets. After clicking *New message* on a ticket which has at least one related ticket, you can select the radio button *Message to related tickets*, above the *Sender* e-mail account.

The related tickets are listed. The ticket you are working with is highlighted in green. To the right of the related tickets you find an icon you click to view the ticket (if you have the right to do so) and a checkbox you tick to select the ticket as recipient. You can select one or several tickets.

The ticket number of the tickets you select are displayed at *To*. Click the *Minimize* button to hide the list where you select tickets. To show the list again, click the *Add/Modify tickets* link. If you want to send the message as e-mail as well, you tick the checkbox *Also send as e-mail* and enter the recipient's e-mail address in the *To* field.

Write your message and click the *Send message* button.

In the list of messages on the ticket, the ticket operator who sent the message will be listed as *Sender*. Please note that messages exchanged between child and parent tickets are always hidden from the customers.

Improved search for final customer to connect to a ticket

We have made some improvements concerning the search function you can use to find a final customer to connect to a ticket, when registering a ticket or working with an already registered ticket. When you click in the drop-down list at *Final customer* you get access to a search field where you can enter text matching the final customer you are looking for.

Next to the *Search text* field you can click an icon (highlighted in red below) to access some new search settings.
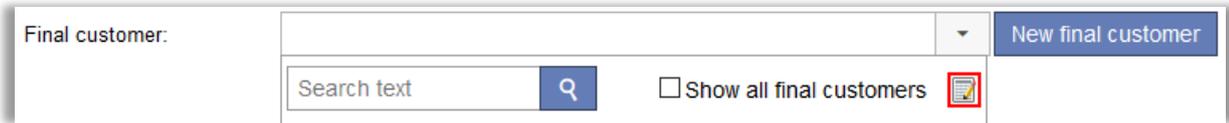
These settings are:

- *Max number of results per page*: If there are many final customers matching your search, they will be divided into different pages. Here you decide how many should be listed on each page.
- *Automatic wildcards*: Decide whether a wildcard (*), representing zero, one or several characters, should be automatically inserted:
    - *In the beginning and in the end*: If you for example type *swed*, it would be the same as if you typed **swed** and the search will result in all final customers who have *swed* somewhere in their name, for example *Artologik Sweden*.
    - *Only in the end:* If you for example type *arto*, it would be the same as if you typed *arto** and the search will result in all final customers whose name begin with *arto*, for example *Artologik Sweden*.
- *Show columns*: Decide which information about the final customers should be displayed as columns in the search result. You can choose from the default fields in the organisation details, as well as any self-defined *Organisation fields*. This can make it easier to select the right final customer when several of them have similar names.
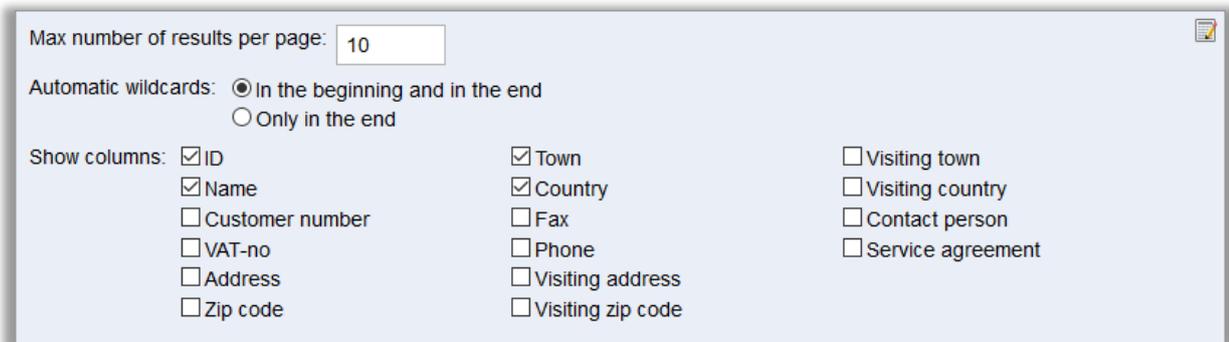
Click the icon again to close the settings window. Perform the search and click on the final customer you want to connect to the ticket.

HD-TIME

Block hours

If your customers buy pre-paid blocks of support hours from you, you can use a new function in HD-TIME to keep track on how many hours each customer has bought, as well as the number of hours used and remaining. You will receive a warning when you register time on tickets for customers, whose pre-paid hours are used up.

You activate the function, *Use block hours*, under *Administration > System settings > TIME link*.

Creating a block hour period

When a customer has bought a block of hours, you go to that organisation's details and enter the number of hours in the field *Block hours*. You also have to enter a start date for the block hour period in the *From* field. If the customer buys a block of hours that have to be used before a certain date, you enter that date in the *To* field, otherwise you leave the field blank. Create the block hour period by clicking *Save*. The period and the number of hours can later be changed by clicking the edit icon.

Block hours (History)						
From (including)	To (including)	Block hours (hh:mm)	Registered time (hh:mm)	Remaining time (hh:mm)		
2019-01-01	2019-12-31	40:00	0:00	40:00	📄	❌
2018-01-01	2018-12-31	10:00	4:30	5:30	📄	❌

From (including)	To (including)	Block hours	
			Save

If the customer buys a new block of hours, you create a new block hour period as described above. Since only one block hour period can be active at a time, the previous period must have an end date, and that date must be earlier than the next period's start date. Block hours, which still exist for the old period, can no longer be used.

Registering time on a ticket

When your support staff registers time on tickets for a customer, the registered hours will be subtracted from that customer's block of hours. Only time registered with time codes, which have been set as "billable" in TIME, will be subtracted.

Activity		Time Code		Comment	Time			
Support	▼	Ordinary time	▼	20121004:002	1	▼	: 30	▼

If the time registration you make means that the total number of registered hours will exceed the currently set block of hours, you will get a message (see below), but you will still be able to save the registration by clicking *OK*.

> The time registration will exceed the currently set block of hours. Continue?
>
> OK   Avbryt

Organisation list overview

When you list organisations in the *Organisation* menu, you will find the column *Remaining block hours* where you can get an overview of how many hours each organisation has left to use for the current period. Organisations who have exceeded their block of hours will have a negative number of hours remaining. If nothing is displayed for an organisation in the *Remaining block hours* column, no block of hours has been created for that organisation. You can sort the organisations by clicking the *Remaining block hours* heading.

Country	Remaining block hours ▾	Placement in organisation tree
Germany	10:00	Main organisation
Ireland	7:30	Main organisation
United States of America	3:00	Main organisation
Canada	1:00	Main organisation

Block hour report

When you use the block hour function, you have access to the new *Block hours* report. In this report, you can show the block hour information and the time registrations for selected organisations.

In the report's edit mode, you select the organisations you want to show in the report. If no selection is made, all organisations will be included. You also specify a time period for which you want to see the information and time registrations.

Under *Report content*, you decide what to show in the report: *Block hour information*, *Individual time registrations* and/or *Time registration totals*. If you show time registrations in the report, you can decide to show *All registrations*, *Only registrations that fall within a block hour period* or *Only registrations that don't fall within a block hour period*. If you show individual time registrations, you can also tick the checkbox *Ticket number and ticket title* to group the time registrations by ticket.

⊟ Report content

☑ Block hour information

Time registrations
☑ Individual time registrations
  ☑ Ticket number and ticket title
☑ Time registration totals
◉ All registrations
○ Only registrations that fall within a block hour period
○ Only registrations that do not fall within a block hour period

Print settings
☐ Page break before each organisation

The report will be grouped by (in this order):

- Organisation
- Block hour period
- Ticket (if activated in the report content settings)
- Activity

Company A
Period: 2018-09-01 – 2018-12-31

Ticket number: 20181023:002
Ticket title: System setup

Time registration date	Comment	Billable time	Non-billable time
Training			
2018-10-23	20181023:002		1:00
Support			
2018-10-23	20181023:002	4:00	
2018-10-23	20181023:002	1:30	
Total registered time - Ticket 20181023:002		5:30	1:00
Total time		**5:30**	**1:00**

Block hour period: 2018-09-01 – 2018-12-31
Total number of block hours: 10:00
Used block hours: 5:30
Remaining block hours: 4:30

HD-Track

Possible to search for products to link

When you want to connect a product to a ticket, or to an organisation, user or object, you now have access to a search field where you can enter the whole or a part of the name of the product you want to link. When you start typing the list will be filtered so that only products matching your search will be displayed.

Product group:	Mobile phones ▼
Product number:	SGS6: Samsung Galaxy ▲

sam 🔍

SGA3: Samsung Galaxy A3
SGJ5: Samsung Galaxy J5
SGS6: Samsung Galaxy S6
SGS7: Samsung Galaxy S7

Default setting for the "Product selection" drop-down list

When linking a product to a ticket, the drop-down list *Product selection* is available if it is possible to link products in more than one way in system: to objects, to organisations and/or to users. You can use the *Product selection* drop-down list to filter which products are available in the drop-down list where you select the product to link to the ticket, by selecting one of the following options:

- *All*: Available if the setting *All products can be linked to a ticket* has been activated.
- *Linked to the object*: Available if it possible to link products to objects.
- *Linked to the organisation*: Available if it possible to link products to organisations.
- *Linked to the 'registered for' user*: Available if it possible to link products to users.

In the *Administration > Product administration > Settings* menu, you can now decide which of these options shall be pre-selected when a user links a product to a ticket. Select the option of your choice at *Default connection shown when adding a product to a ticket*.

Default connection shown when adding a product to a ticket

Linked to the organisation

☑ Make it possible to set a default connection per organisation group
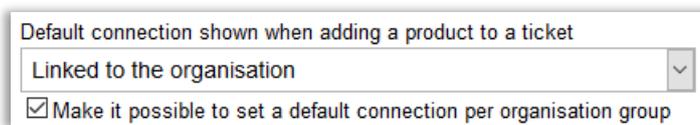
If you have the plug-in HD-Advanced, you can activate the setting *Make it possible to set a default connection per organisation group*. You can then decide on organisation group level which option shall be pre-selected.

HD-Map

The map is included when exporting a ticket to PDF

When you handle a ticket, you can export the ticket information by clicking the *PDF* button in the ticket form and selecting either *Save as PDF* or *Send PDF*. If you are using HD-Map, and if you have selected a spot or an area in the map on the ticket, the map with the selected area/spot will now be included in the PDF.