

Project/Ticket generator

PROJECT SUPPORT	
Main contact person	Thomas Tleo

Special parameter: „PEHI_MULTITICKETGEN“

The project generator can be opened via **Persons/... new, change, delete** → select the person, and then click **New**. The „Select categories“ window opens; click on „Create several entries“.

The screenshot shows a software interface with a menu and a dialog box. The menu is titled "Kontakte" and has a red circle with the number "1" next to it. The menu items are: "neu erfassen, ändern, löschen", "Schränke und Caddie-Boxen", "SMS senden", "Drucken...", "Liste", "Formulardruck", "Serienbriefe", "Adressaufkleber", "Statistik", and "Scorekarten". A red circle with the number "2" is next to the "neu erfassen, ändern, löschen" item. Below the menu is a dialog box titled "Wählen Sie die Kategorie" with a close button (X). The dialog box has a search field and a checkbox labeled "Alphabetisch". The list of categories is as follows:

KEYA	1S_Keyaccount
DASH	1S_Dashboard
BIH	1S_Interne Hilfe
REKL	1S_Reklamation
GOBD	1S_Rückfragen und Korrespondenz zu C
RÜVE	1S_Rückruf, vergeblich
SWB	1S_Software-Beratung/Kundenpflege
SUMA	1S_Support Mail/Fax/Brief
SUPP	1S_Support Todo
SANR	1S_Support-Anruf
PSUPP	1S_Support-Projekt

At the bottom of the dialog box, there are two options: "Mehrfachanlage" with a green "F6" key indicator and "Ansprechpartner umwandeln" with a green "F9" key indicator. A red rectangle highlights these two options.

Main window

Projekte	Ab Datum	Bis Datum	Wochentag	Uhrzeit	Alle	Im Voraus	Zuletzt generiert
TK Technik	31.10.19	07.11.19	Donnerstag	09:00	Wochen	2	25.10.19 00:10:04
TK PCCO	01.11.19 (F)	15.11.19	Freitag	09:00	Wochen	3	26.10.19 00:00:02
TK Steinhuder Meer	30.10.19	-	Mittwoch	15:00	Einmalig	Keine	21.10.19 11:21:29
TK Programmierung	04.11.19	11.11.19	Montag	09:00	Wochen	2	29.10.19 00:01:33

Buttons: + Neu (F9), Edit (F7), Löschen (F5), ↑ In der Liste höher, ↓ In der Liste tiefer, Ende

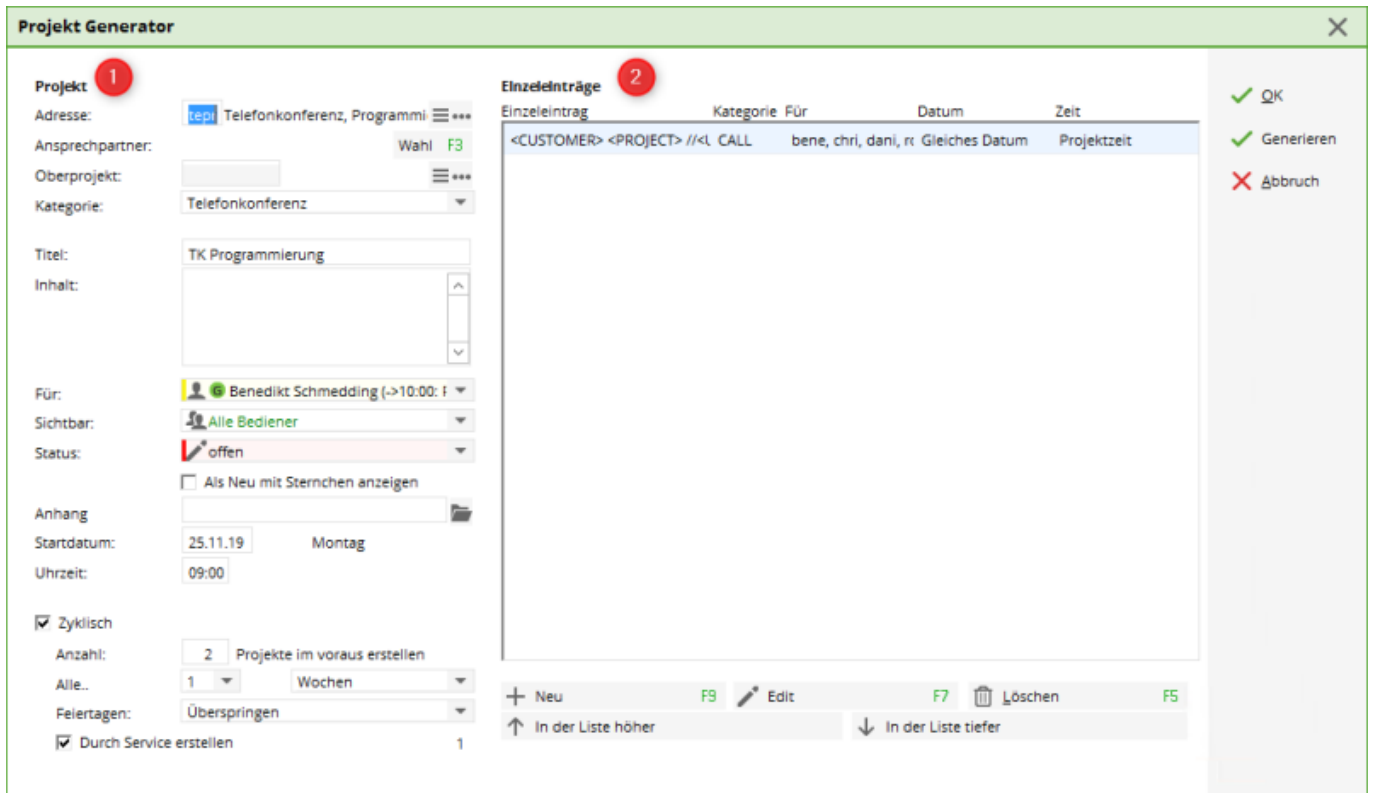
Actions: Generieren, Zurücknehmen, Kopieren

- 1. Open the configuration window for a new project.
- 2. Create the selected project manually.
- 3. Delete created projects from the system.

Please note:

- (F) after the date means that this day is a public holiday („Feiertag“ in German).
- You can see whether it has an automatic function under the „All“ column. This can be weekly or monthly
- The column „Last generated“ DOESN'T distinguish whether it was created manually or automatically.

1. Configuration window



1. Here you can configure the project. The automatic mode can be determined below..

Note:

- The option „Show new with asterisk“ is meant in such a way that when it is checked, the project appears in the appointment window with the asterisk icon.
- „Repetitive“ means automatic repetition. You can decide whether it should be done weekly or only every x weeks. The „Create through service“ option means automatically checked and generated in the service.

2. List of all individual entries for the project. Single entries can be added with the „New“ button.

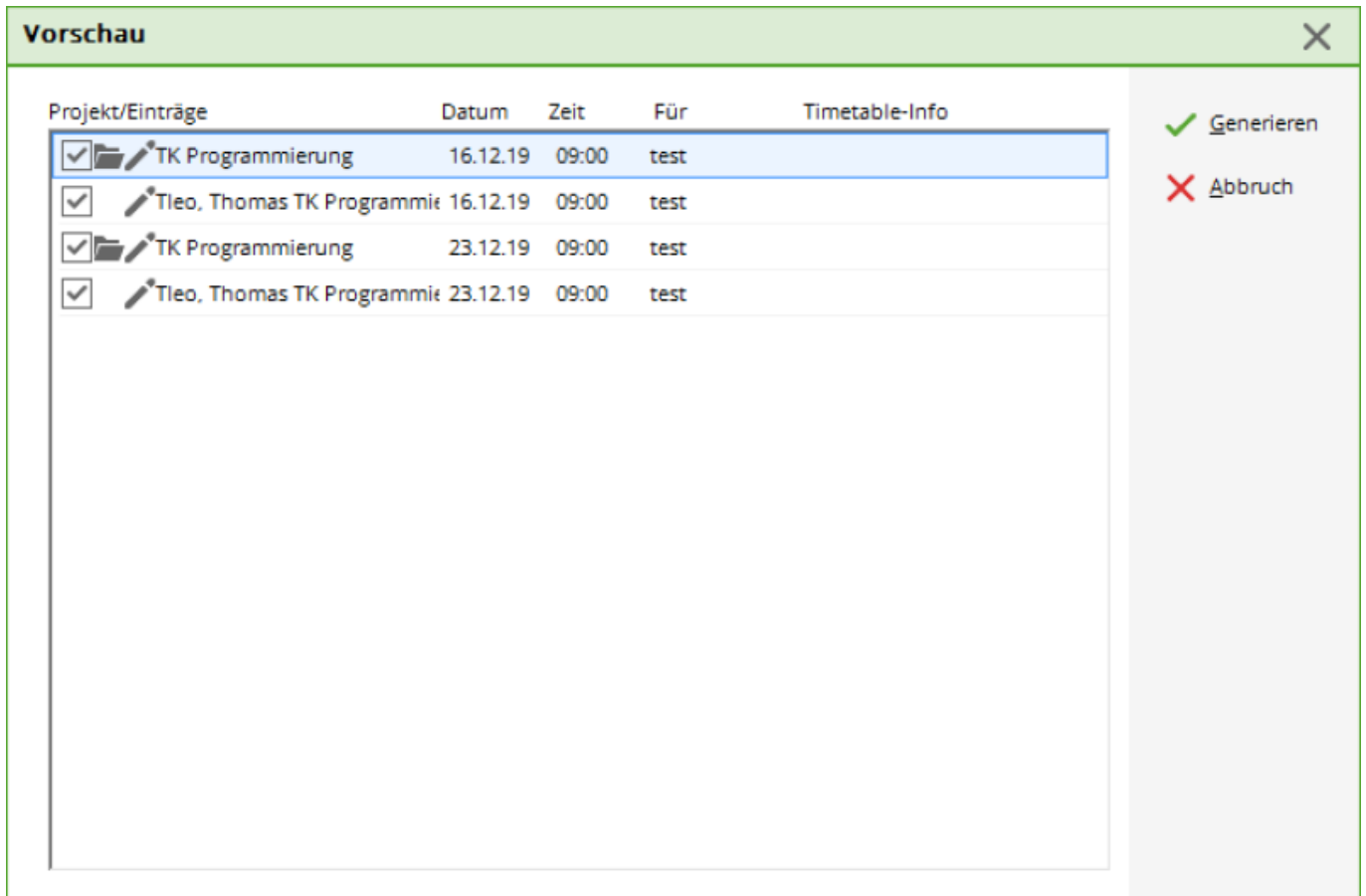
Single entry

In this window you can configure the desired individual entry (entries). Please note:

- You can either select a group under „For“ and the individual entry will be created for the group, or you can also check the „Make individual entries for group“ checkbox and an individual entry will be created for each member of the group
- If you check „Show new with asterisk“, the individual entry will not be displayed in the appointment window until the resubmission date.

2. Generate

The preview appears after you have selected a project and click on generate. It looks something like this:

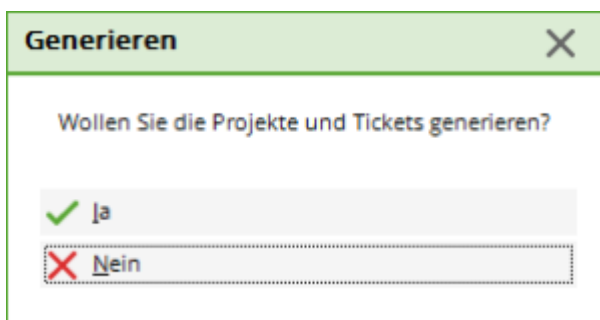


The icon shows whether it is a project (folder) or a ticket (status icon). If a project or a ticket should not be created (for example, vacation), the check mark on the far left can be removed and the project or ticket will not be created.

Nothing is displayed for the timetable info if everything is in order, otherwise there are 3 possible notes.

- „No TT entry is made“ („Show in employee plan“ not checked);
- „Conflict!!!!“ (TT entry collides with the existing appointment, if it is confirmed anyway, it is entered as a filter)
- „No timetable area available“ (no TT entry possible, although „Show in employee plan“ is checked)

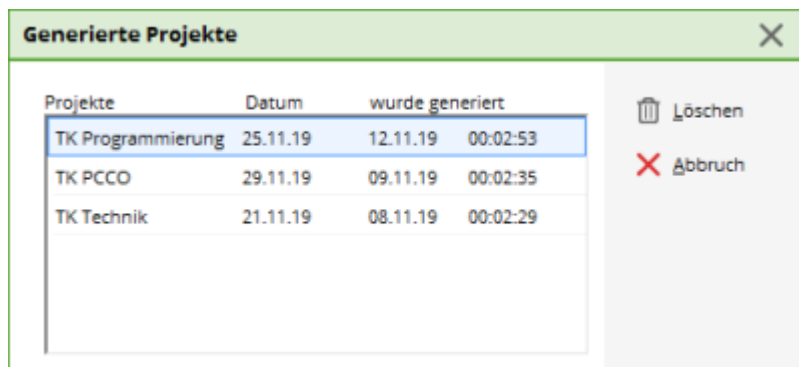
To continue, press Generate. A final window appears.



You confirm with „Yes“ and the projects / tickets are then generated. If you click „No“, the entry is canceled and nothing was generated.

3. Undo

Here you can delete generated projects. All associated tickets and timetable entries are also deleted. Select the project you want and press the Delete button.



The screenshot shows a dialog box titled "Generierte Projekte" with a close button (X) in the top right corner. Inside the dialog, there is a table with three columns: "Projekte", "Datum", and "wurde generiert". The table contains three rows of data. To the right of the table, there are two buttons: "Löschen" (Delete) with a trash icon and "Abbruch" (Cancel) with a red X icon.

Projekte	Datum	wurde generiert
TK Programmierung	25.11.19	12.11.19 00:02:53
TK PCCO	29.11.19	09.11.19 00:02:35
TK Technik	21.11.19	08.11.19 00:02:29

The list only contains the projects that were generated in the last seven days.