



Projectile

Version 6.2

Die integrierte Gesamtlösung für
Dienstleister: Projekte, Prozesse, Wissen.

Help, Part 12: Tickets & Kanban

Table of Contents

12.1 Tickets (Change Requests).....	2
12.2 Editing Tickets.....	4
12.3 Ticket Overview.....	5
12.4 Kanban Boards.....	6
12.4.1 Configuration of the Kanban Boards.....	7
12.4.2 Working with Kanban Boards.....	10
12.4.3 Project Kanbans.....	13

12.1 Tickets (Change Requests)

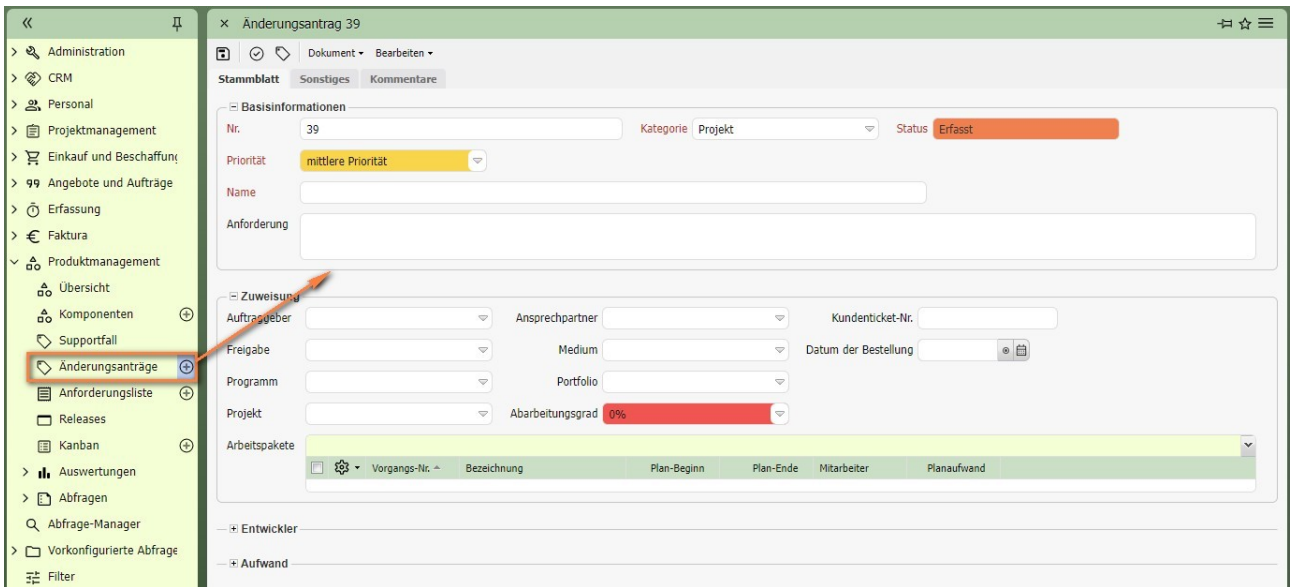
Change requests, often simply referred to as "tickets", are an essential element of project management in software development, engineering or for larger projects and help to ensure that projects are carried out in an efficient and organized manner. Tickets are, for example, tasks, errors, functional requirements or other work and serve to organize the work in the team, track progress and ensure that all aspects are documented and managed.

Projectile includes the optional "Product Management" module. This module contains support cases, change requests, components and releases (for products and versions), an overview with filters for the change requests and the Kanban boards.

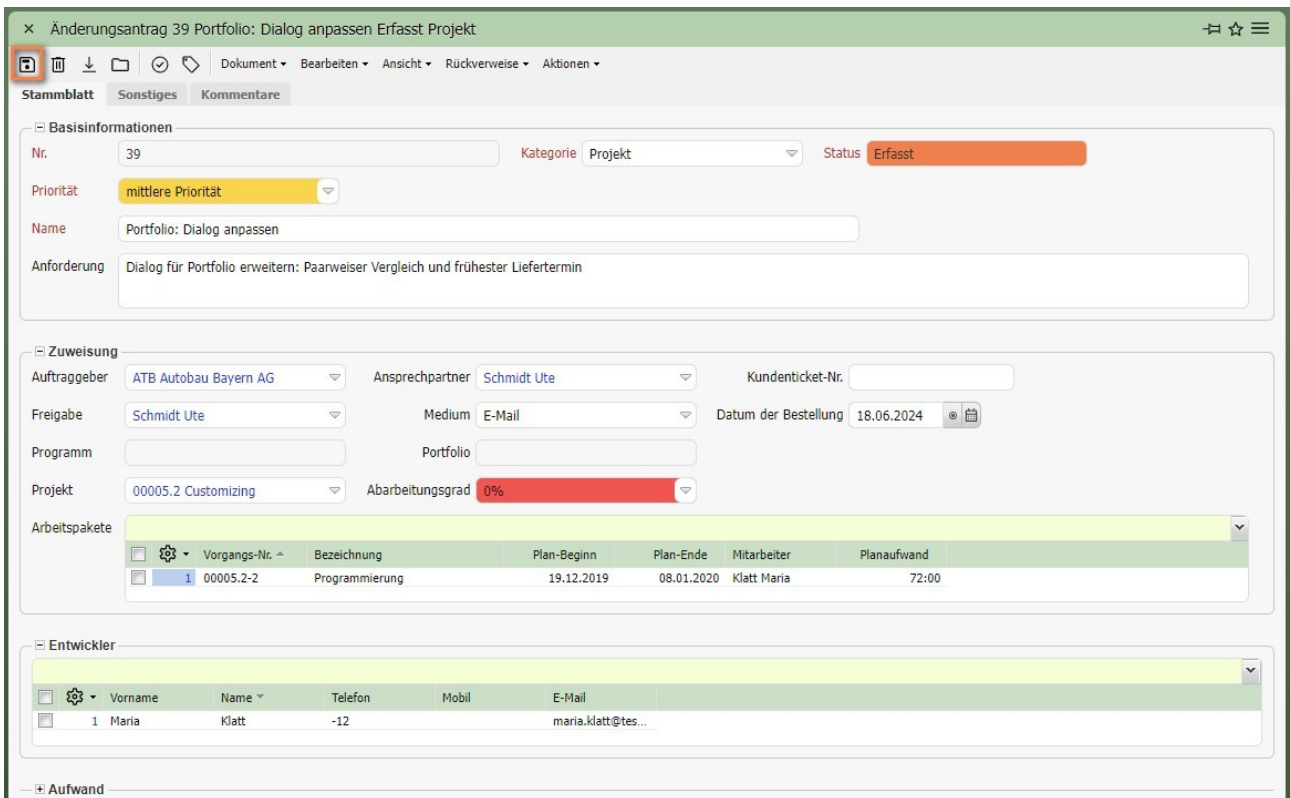
In the "Product Management" menu, change requests can also be managed. Here the user can (depending on authorization) search in the existing change requests and view, change and also delete data.

The screenshot displays a software interface with a sidebar menu on the left and a main content area on the right. The sidebar menu includes categories like Administration, CRM, Personal, Projektmanagement, Einkauf und Beschaffung, Angebote und Aufträge, Erfassung, Faktura, Produktmanagement, and others. The 'Änderungsanträge' (Change Requests) option is highlighted in the sidebar. The main content area shows a list of change requests with columns for Name, Status, and Auftraggeber. A red arrow points from the 'Änderungsanträge' menu item to the list. The detailed view of a change request (No. 32) is shown on the right, with fields for Basisinformationen (Nr., Kategorie, Status, Priorität, Name, Anforderung) and Zuweisung (Auftraggeber, Ansprechpartner, Kundenticket-Nr., Freigabe, Medium, E-Mail, Datum der Bestellung, Programm, Portfolio, Projekt, Abarbeitungsgrad, Arbeitspakete). The 'Arbeitspakete' table shows a task with Vorgangs-Nr. 1, Bezeichnung Programmierung, Plan-Beginn 19.12.2019, Plan-Ende 08.01.2020, Mitarbeiter Testuser, and Planaufwand 72:00.

In the following example, a new change request is created using the "+" button in the menu. This example shows the standard version. Individual fields in the customer versions differ from this. The relevant fields are filled in after creation (e.g. name, request, assignment to projects, customers, work packages and employees, etc.) ...



... and then the change request is saved.



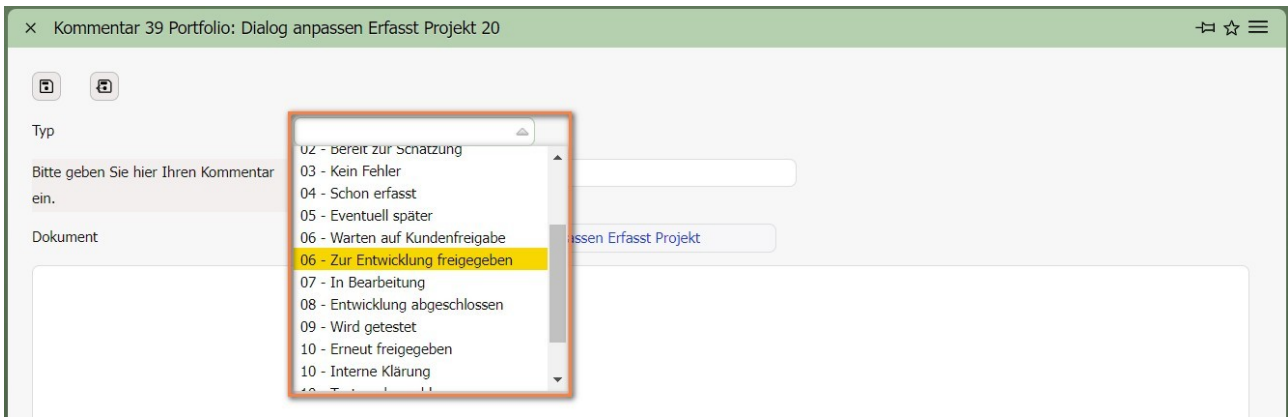
Further information, such as expenses and prices, can then be entered.

12.2 Editing Tickets

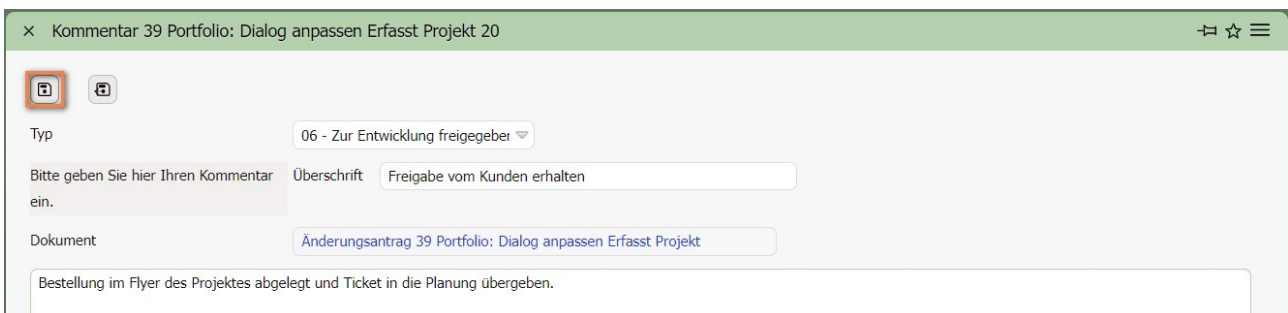
The change requests can now be released for processing or rejected by the person responsible. Status changes can be made using the "Set status" action.

In the following example, the ticket is not rejected but released for development. The "Set status" action opens a dialog in which the status of the change request can be set and a comment on the status change can be entered.

The status characteristics are configurable and can be used in some versions with the help of the integrated workflow engine for process support.



After entering and saving...



... the status changes from "Captured" to "Released for Development":

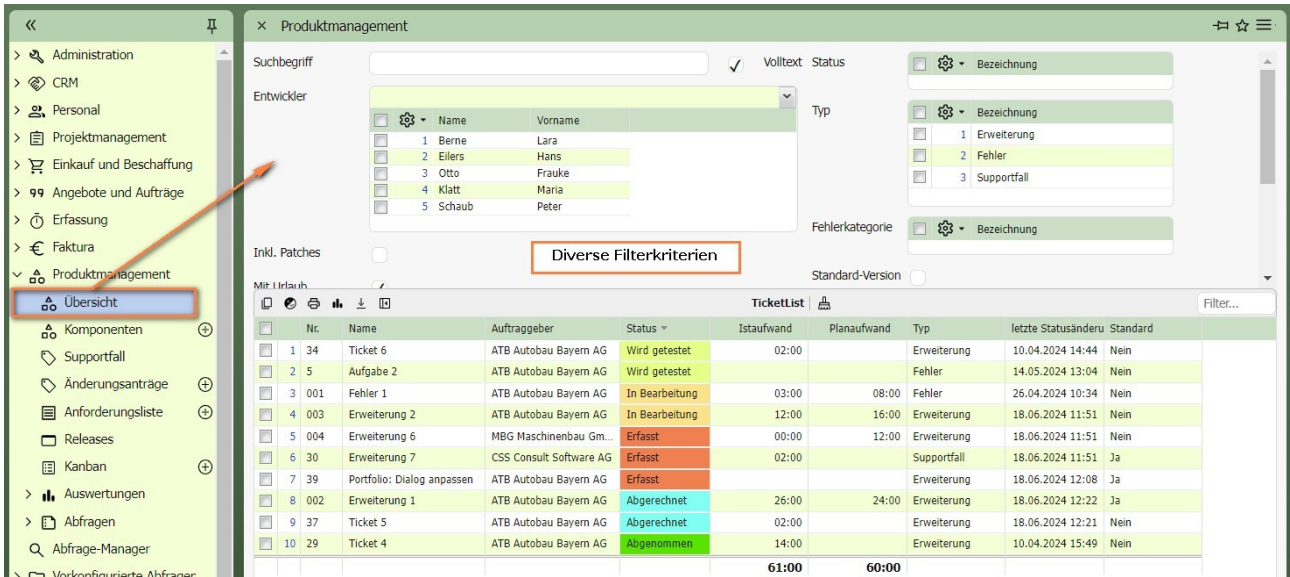


External documents (e.g. specifications or error descriptions) can also be uploaded in the change request using the flyer. The status change can alternatively (and also more effectively) be carried out using the Kanban boards (see section 12.4).

12.3 Ticket Overview

The Product Management module also includes an overview function (Product Management - Overview menu). This overview filters the change requests using the criteria employee, target version, date, status, type, rating. Depending on the implementation, further criteria for filtering the tickets are also

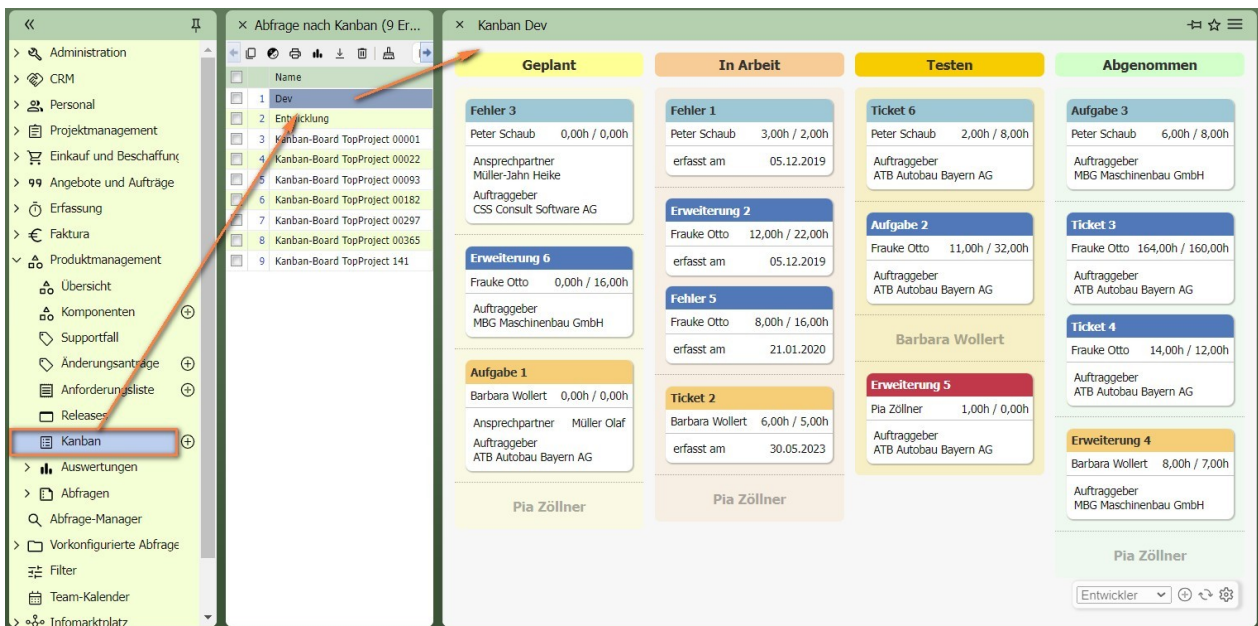
supported.



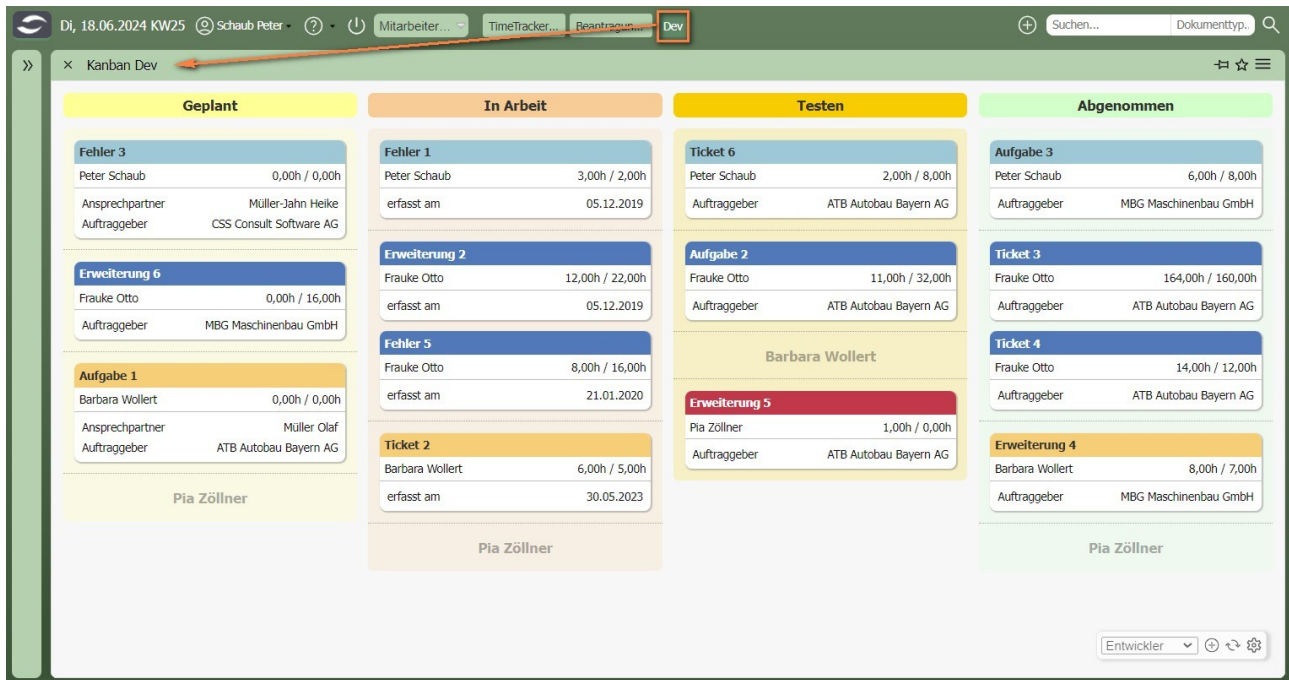
Alternatively, individual overviews for portals can also be created using the integrated "ReportMaker" or the Kanban boards.

12.4 Kanban Boards

Kanban boards offer a special form of ticket overview. A Kanban board is a visual project management tool used to visualize, organize and optimize the flow of work. These boards are often used in engineering, software development and various other industries to support agile practices. The tickets are usually cards.

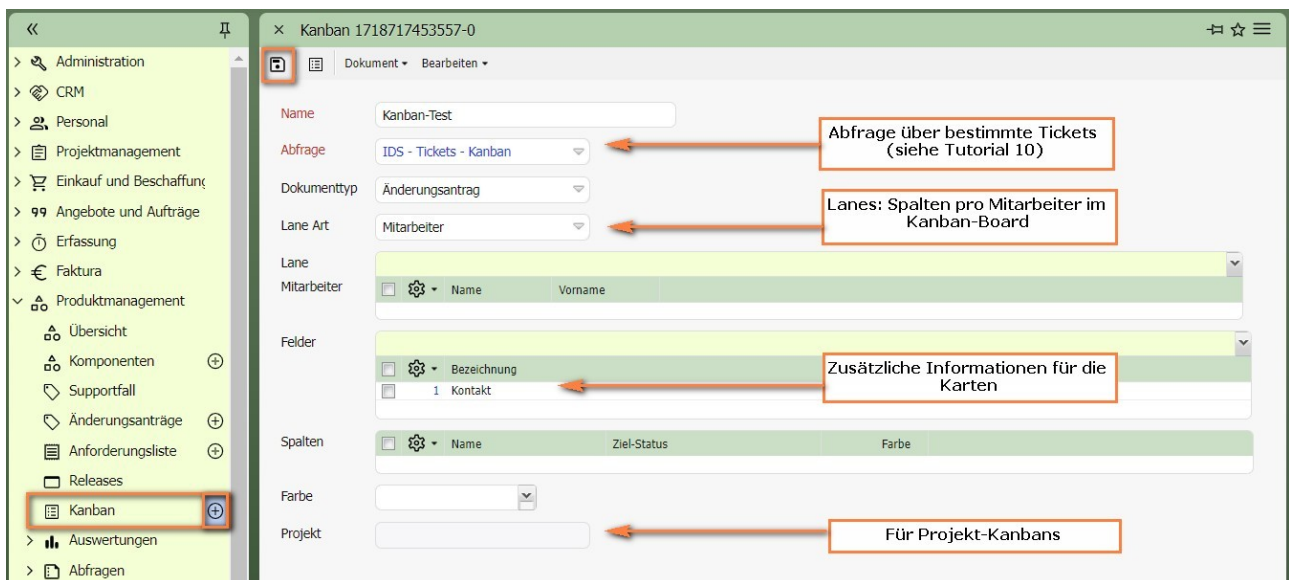


Kanban boards can be opened either via the main menu or portals:



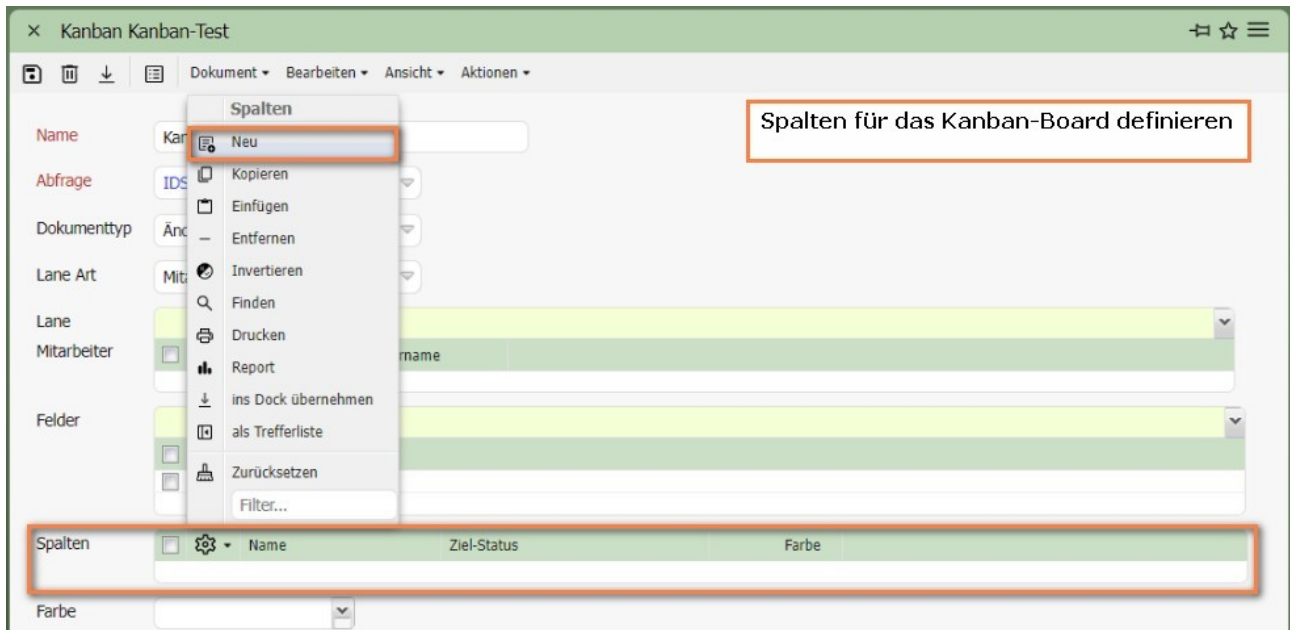
12.4.1 Configuration of the Kanban Boards

The following example shows the configuration of a Kanban board with four columns. After creating the "Kanban" configuration, a name is first assigned and a query for change requests is assigned (see tutorial "10 Report Generator") The employee lane is also used here.



An employee lane in the Kanban board is a visual row that is used to organize and display tickets at different stages of a work process. Each lane (visual row) represents an employee/processor of the tickets.

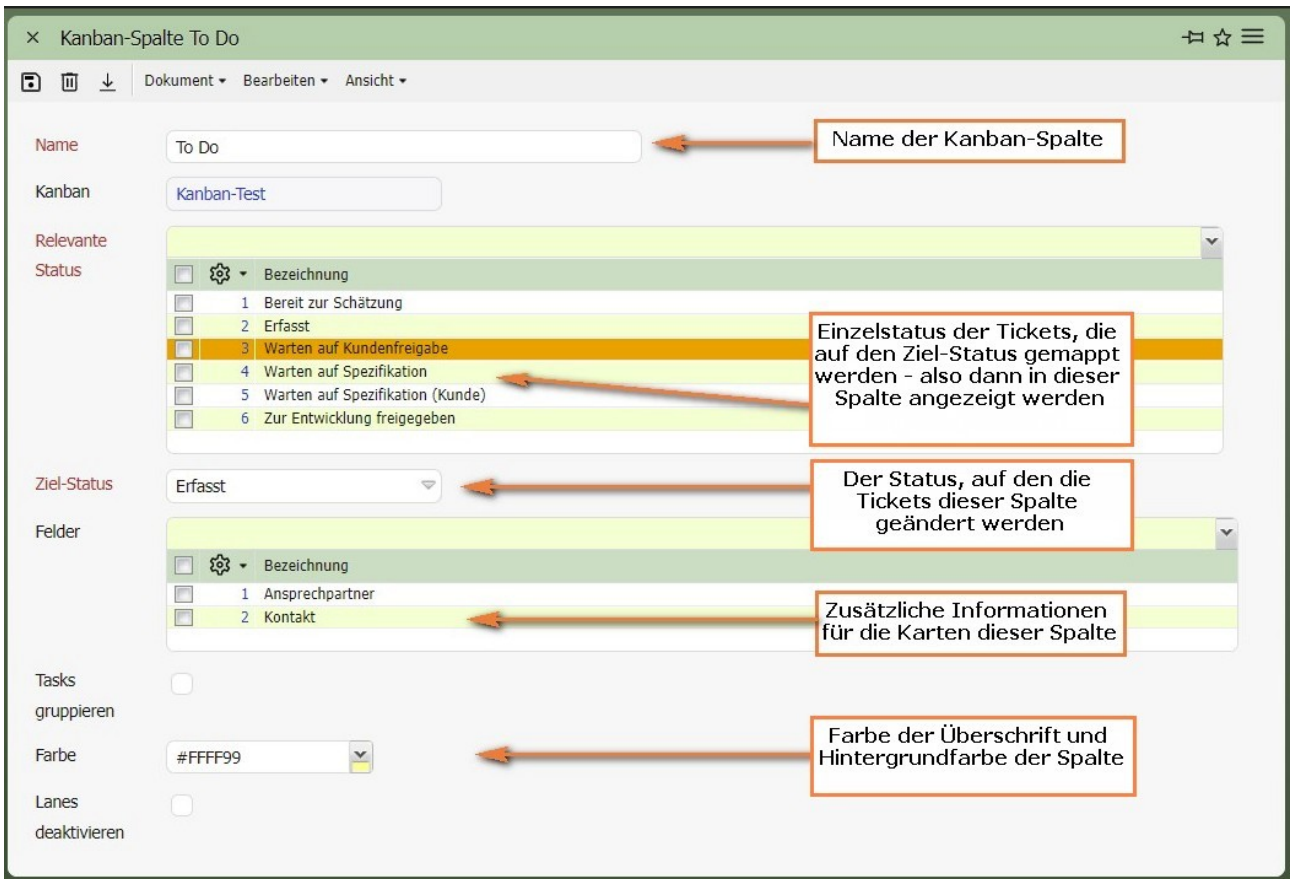
In the next step, the columns of the Kanban board (status transitions or process steps) are configured. The first column is then defined with "New" in the "Columns" field.



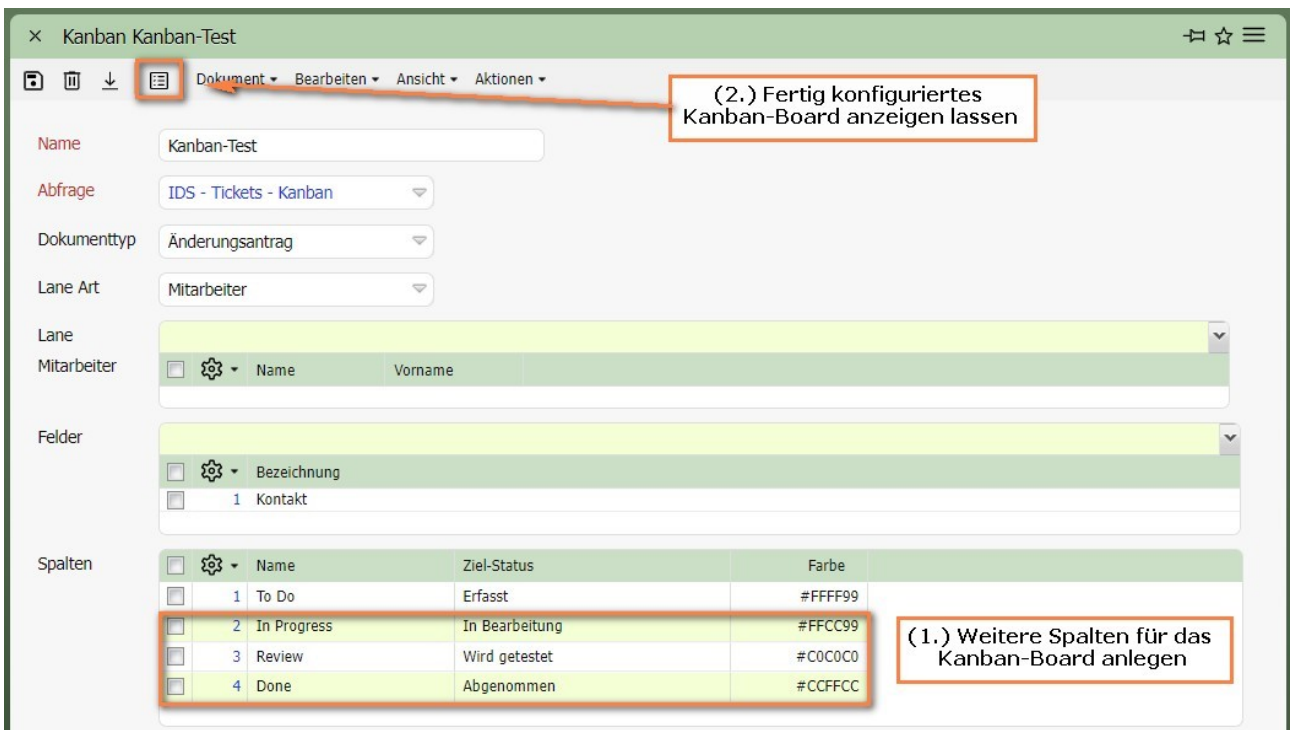
To do this, the column is named (here "To Do"), the status transitions are defined and, if necessary, additional information for the tickets ("Fields") and the background color of the column ("Color") are stored.

In the "Relevant statuses" field, the statuses of the tickets to be displayed in this column are selected and the status to which the ticket is to be changed is entered in the "Target Status" field.

The configuration of this first column is then saved and closed.

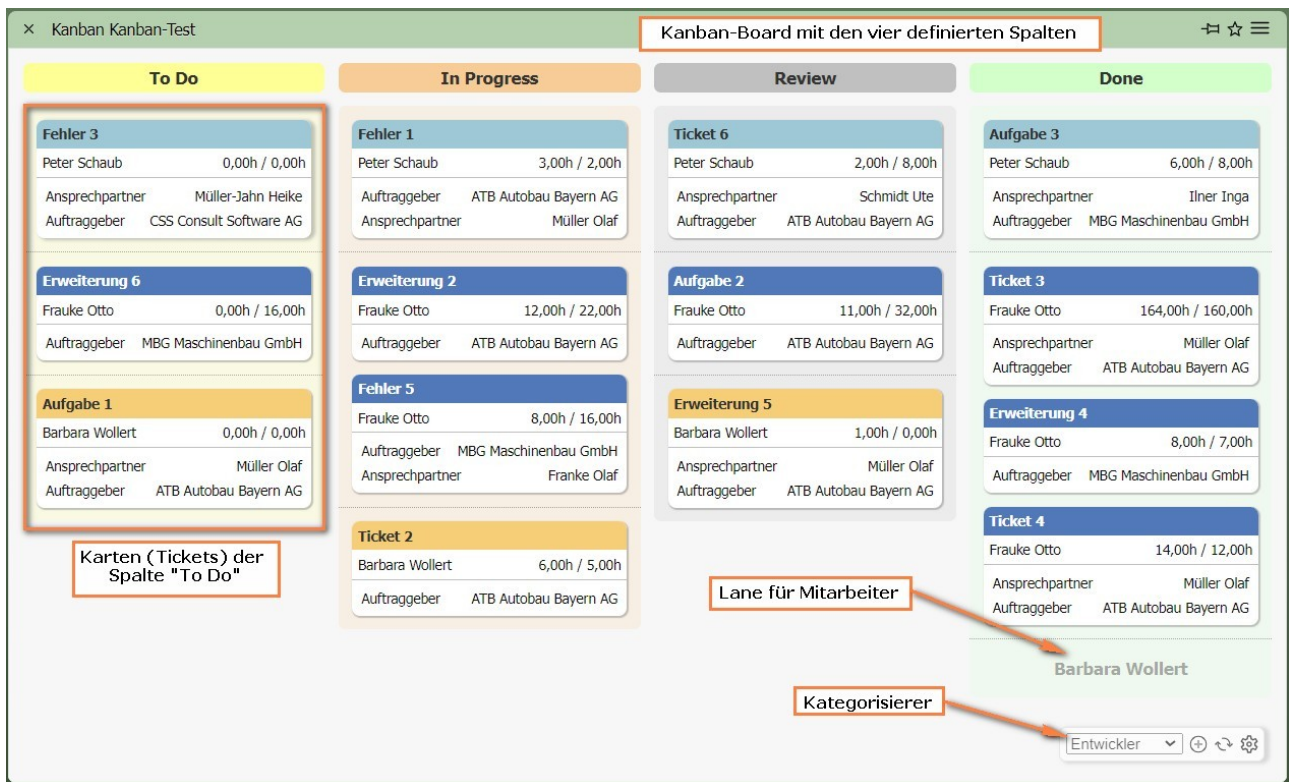


Similarly, three more columns are created and the Kanban board is opened.

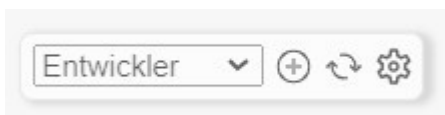


The following screenshot shows the open Kanban board with the four columns

"To Do", "In Progress", "Review" and "Done" with a colored background and the employee lanes vertically:



The categorizer determines the color of the heading for the tiles (here the color code is controlled according to the employees).



Other categorizers are the customer and the priority.

12.4.2 Working with Kanban Boards

The following example demonstrates a workflow for processing tickets.

The Kanban board with the four columns contains ten tickets for three different employees. Four of the tickets still have the status "To Do", two tickets are being processed ("In Progress"), two tickets are in "Review" and two other tickets have already been completed ("Done").

Another ticket/card is created with the help of "+" ...

Kanban Kanban-Test

To Do	In Progress	Review	Done
Erweiterung 6 Barbara Wollert 0,00h / 16,00h Auftraggeber MBG Maschinenbau GmbH	Ticket 2 Barbara Wollert 6,00h / 5,00h Auftraggeber ATB Autobau Bayern AG	Ticket 6 Barbara Wollert 2,00h / 8,00h Ansprechpartner Schmidt Ute Auftraggeber ATB Autobau Bayern AG	Barbara Wollert Aufgabe 3 Peter Schaub 6,00h / 8,00h Ansprechpartner Ilner Inga Auftraggeber MBG Maschinenbau GmbH
Erweiterung 5 Barbara Wollert 1,00h / 0,00h Ansprechpartner Müller Olaf Auftraggeber ATB Autobau Bayern AG	Fehler 5 Peter Schaub 8,00h / 16,00h Auftraggeber MBG Maschinenbau GmbH Ansprechpartner Franke Olaf	Peter Schaub Aufgabe 2 Frauke Otto 11,00h / 32,00h Auftraggeber ATB Autobau Bayern AG	Ticket 4 Frauke Otto 14,00h / 12,00h Ansprechpartner Müller Olaf Auftraggeber ATB Autobau Bayern AG
Aufgabe 1 Barbara Wollert 0,00h / 0,00h Ansprechpartner Müller Olaf Auftraggeber ATB Autobau Bayern AG	Frauke Otto		
Fehler 3 Peter Schaub 0,00h / 0,00h Ansprechpartner Müller-Jahn Heike Auftraggeber CSS Consult Software AG			
Frauke Otto			

Kanban-Board für drei Mitarbeiter (Farbcodes) mit Lanes und vier Spalten

Neuanlage eines Tickets

Entwickler

... the relevant information entered ...

Änderungsantrag 40

Dokument Bearbeiten

Stammblatt Sonstiges Kommentare

Basisinformationen

Nr. 40 Kategorie Projekt Status Erfasst

Priorität mittlere Priorität

Name

Anforderung

Zuweisung

Entwickler

Aufwand

... and saved.

After closing the ticket ...

Änderungsantrag 40 Beispiel für das Kanban-Board Erfasst Projekt

Dokument Bearbeiten Ansicht Rückverweise Aktionen

Stammblatt Sonstiges Kommentare

Basisinformationen

Nr. 40 Kategorie Projekt Status Erfasst

Priorität mittlere Priorität

Name Beispiel für das Kanban-Board

Anforderung Das ist die Anforderung für das Ticket ...

Zuweisung

Auftraggeber FZB Flugzeugbau AG Ansprechpartner Lauer Klaus Kundenticket-Nr.

Freigabe Lauer Klaus Medium E-Mail Datum der Bestellung 18.06.2024

Programm Portfolio

Projekt 00329.2.2 Entwicklung Abarbeitungsgrad 0%

Arbeitspakete

Vorgangs-Nr.	Bezeichnung	Plan-Beginn	Plan-Ende	Mitarbeiter	Planaufwand
1 00001.2-2	Customizing	16.12.2019	20.12.2019	Otto Frauke	04:00

... the change request is sorted into the Kanban board. Here, the new ticket with the status "Created" is assigned to the first column "To Do". The ticket is then moved to the next column "In Progress" in the "Frauke Otto" lane:

Kanban Kanban-Test

To Do

Erweiterung 6
Barbara Wollert 0,00h / 16,00h
Auftraggeber MBG Maschinenbau GmbH

Erweiterung 5
Barbara Wollert 1,00h / 0,00h
Ansprechpartner Müller Olaf
Auftraggeber ATB Autobau Bayern AG

Aufgabe 1
Barbara Wollert 0,00h / 0,00h
Ansprechpartner Müller Olaf
Auftraggeber ATB Autobau Bayern AG

Fehler 3
Peter Schaub 0,00h / 0,00h
Ansprechpartner Müller-Jahn Heike
Auftraggeber CSS Consult Software AG

Beispiel für das Kanban-Board
Frauke Otto 0,00h / 16,00h
Ansprechpartner Lauer Klaus
Auftraggeber FZB Flugzeugbau AG

In Progress

Ticket 2
Barbara Wollert 6,00h / 5,00h
Auftraggeber ATB Autobau Bayern AG

Fehler 5
Peter Schaub 8,00h / 16,00h
Auftraggeber MBG Maschinenbau GmbH
Ansprechpartner Franke Olaf

Frauke Otto

Review

Ticket 6
Barbara Wollert 2,00h / 8,00h
Ansprechpartner Schmidt Ute
Auftraggeber ATB Autobau Bayern AG

Peter Schaub

Aufgabe 2
Frauke Otto 11,00h / 32,00h
Auftraggeber ATB Autobau Bayern AG

Done

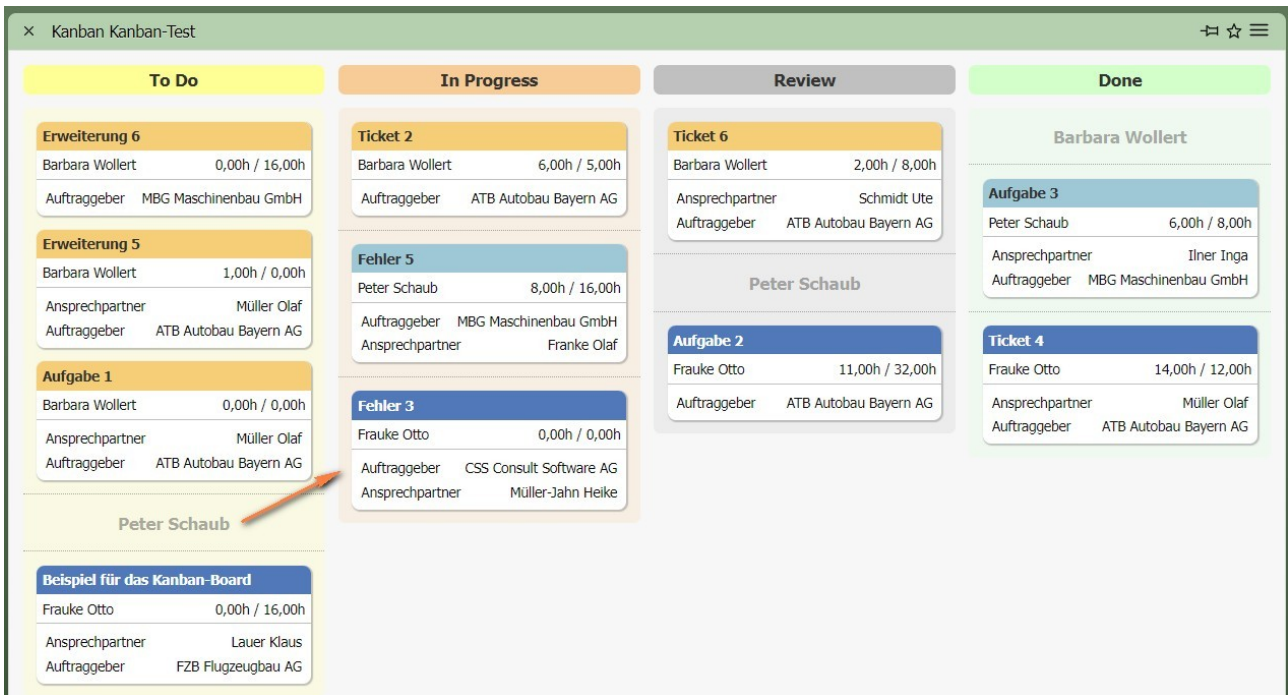
Barbara Wollert

Aufgabe 3
Peter Schaub 6,00h / 8,00h
Ansprechpartner Iliner Inga
Auftraggeber MBG Maschinenbau GmbH

Ticket 4
Frauke Otto 14,00h / 12,00h
Ansprechpartner Müller Olaf
Auftraggeber ATB Autobau Bayern AG

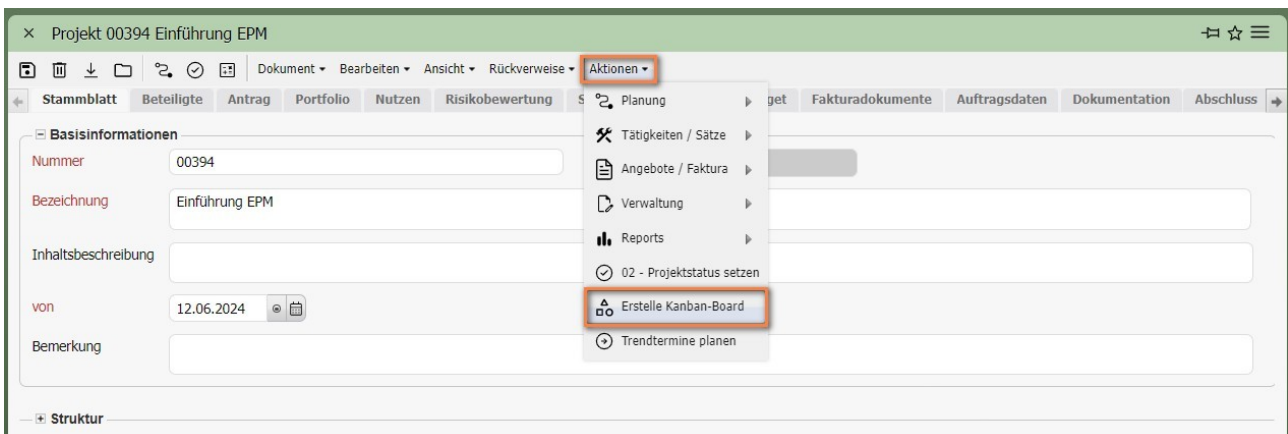
Entwickler

After moving the ticket, the status and the employee change automatically:



12.4.3 Project Kanbans

Kanban is not used exclusively for all change requests of an organization, but also for selected subsets: Kanban for all changes of a category, an employee or Kanban for a specific project. In Projectile, you can create a Kanban board directly from a project...



...using the "Create Kanban Board" action without much effort. The name, the query (all tickets in the project structure) and the reference to the project are then created in the "Kanban" configuration.

Kanban Kanban-Board TopProject 00394

Name: Kanban-Board TopProject 00394

Abfrage: KanbanCreationTickets

Dokumenttyp: Änderungsantrag

Lane Art:

Lane:

Mitarbeiter: Name Vorname

Felder: Bezeichnung

1 Kontakt

2 Ansprechpartner

Spalten: Name Ziel-Status Farbe

1	In Planung	Zur Entwicklung freigegeben	#CCFFFF
2	In Bearbeitung	In Bearbeitung	#FFFF99
3	Erledigt	Entwicklung abgeschlossen	#CCFFCC

Farbe:

Projekt: 00394 Einführung EPM

Projektbezogene Abfrage und Zuordnung zum Projekt

If the display fields and columns are defined in the projectile default (Administration => Application), this information is also used as a default for the project Kanbans:

Projectile Default

Basisdaten Projektplanung Erfassung Erfassung 2 Urlaub Faktura Auswertung Vertretung Gewichtungen Projekt Gewichtungen Portfolio Sonstiges

Bestätigung zum Workflow Beantragung

Inkrafttreten der neuen Reisekostenregelung 2014 01.01.2014

Reise, Zugriffsrechte des eingetragenen Mitarbeiter

Reisebeantragung, Zugriffsrechte des eingetragenen Mitarbeiter

Fahrt, Zugriffsrechte des eingetragenen Mitarbeiter

Beleg, Zugriffsrechte des eingetragenen Mitarbeiter

Reisedatum in der Zukunft

Sperrung der Kosten datiert vor Rückfassungsgrenze

Felder: Bezeichnung

1 Kontakt

2 Ansprechpartner

KanbanColumns: Name Ziel-Status Farbe

1	In Planung	Zur Entwicklung freigegeben	#CCFFFF
2	In Bearbeitung	In Bearbeitung	#FFFF99
3	Erledigt	Entwicklung abgeschlossen	#CCFFCC

KanbanColor: