



Ticketing

Version 5.11

Manual



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1 Concept

Tickets allow communication and handling of problems, inquiries and errors. A ticket contains a description of a problem and additional data such as priority, date and affected item. Documents, images or videos can be attached to an opened ticket to better describe the problem. In addition, it is possible to include an action (response or reaction) describing how to solve the problem. A remark entered at the Shopfloor Terminal appears in the form of a ticket.

An automatically generated history allows the specified actions to be tracked in a log.



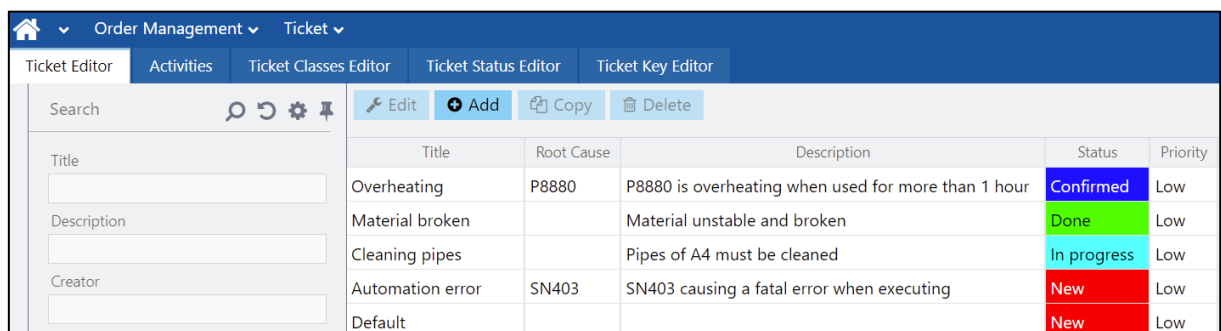
2 Ticket Editor

Path: Order Management > Ticket

The Ticket Editor lets you create new tickets and add actions to existing tickets. Different parameters allow a detailed characterization of the problem.

Like reports, tickets can be exported, downloaded or sent via email.

 All mandatory fields are marked with *.



Title	Root Cause	Description	Status	Priority
Overheating	P8880	P8880 is overheating when used for more than 1 hour	Confirmed	Low
Material broken		Material unstable and broken	Done	Low
Cleaning pipes		Pipes of A4 must be cleaned	In progress	Low
Automation error	SN403	SN403 causing a fatal error when executing	New	Low
Default			New	Low

Fig. 1: Ticket Editor (detail)

2.1 Create new ticket

To create a new ticket:

1. Click on **Add** in the top bar.
The ticket number is assigned automatically and cannot be edited. Each new ticket is assigned a number incremented by 1.
2. Enter the ticket title (mandatory field).
→ After saving, the ticket will appear with the title in the navigation area.
3. Select a status.
Selection of a ticket status (see section 4).
4. Enter initiator.
Reason or cause of the ticket.
5. Select a priority.
6. Enter description (mandatory field).
Precise specification of the problem or error.
7. Select ticket status (see also section 4).
8. If necessary, enter additional information using the tabs **Attributes**, **Attachments**, and **Actions** below the main field and described as follows.
9. Click **Save** in the top bar.
→ The ticket is saved along with attachments and actions.

Ticket Editor

Ticket number

Title *

Root cause

Description *

Status

Priority *

Ticket Class

Attributes

Attachments

Actions

History

Workplace

Date

Shift

Order

Material

Fig. 2: Edit screen of a ticket

Further information can be added to the **Attributes** tab, where specifying attributes can be used to systematically narrow down the affected work situation. The following attributes can be selected:

- Workplace
- Order
- Date
- Shift
- Material

One or more attachments in the form of files can be added to the ticket with the **Attachments** tab. Any file format is possible as an attachment, but with a maximum size of 2 MB.

Attachment

Description *

Attachment *

MIME type *

Size [Bytes]

Ticket Editor

To add an attachment:

1. Click on **Add**.
2. Enter a description of the attachment in the subsequent dialog (mandatory field).
3. Upload the attachment by clicking **Upload attachment**.
4. The remaining fields are filled in automatically according to the selected file.
5. Click on **Add**.

One or more actions on how to solve the problem can be added to the ticket under the **Actions** tab.

To add an action:

1. Click the **Add activity** button.
 2. Enter title and description in the next screen (mandatory fields).
 3. Select assignee.
Person who is to process the ticket.
 4. Select a status.
 5. Set due date.
Date by which the ticket should be processed.
 6. Add remark.
 7. Add attachment (see step 10).
 8. If necessary, send the action per email.
In the upper right corner of the screen, click **Send email**.
 9. Click **Save** in the top bar.
- ➔ The action is saved and assigned to the ticket.

All processing steps related to the ticket can be viewed under the **History** tab, including a log of the actions performed so far and their editors.

2.2 Copy ticket

Instead of creating a new ticket as described above, it may be more efficient to use an existing ticket as a template. This method means fields are already filled out and can be modified specifically if required. The copy function is available for this purpose.

To copy a ticket:

1. Select a ticket in the navigation area.
2. Click on **Copy** in the upper bar.
→ The view changes to the editing screen of the ticket (see Fig. 2).
3. Edit the ticket as necessary.
Assign a new title to the ticket to avoid confusion.
4. Click **Save** in the top bar.

2.3 Edit ticket

It is also possible to edit tickets subsequently.

To edit a ticket:

1. Select a ticket in the navigation area.
2. Click on **Edit** in the upper bar.
→ The view changes to the editing screen of the ticket (see Fig. 2).
3. Edit the ticket as desired.
4. Click **Save** in the top bar.

2.4 Delete ticket

To delete a ticket:

1. Select a ticket in the navigation area.
2. Click **Delete** in the upper bar.
3. Confirm deletion in the subsequent dialog.

3 Ticket Classes Editor

Path: Order Management > Ticket > Ticket Classes Editor

Ticket classes let you create grouping classifications for tickets. This way, tickets can be grouped thematically. Useful classes are for example: material, tool, machine, etc.

In a ticket to which a class has been added, it is recommended to address only the relevant topic to that class.

 All mandatory fields are marked with *.



Code *	<input type="text" value="1"/>
Short Description *	<input type="text" value="Material error"/> 
Description	<input type="text" value="Tickets for missing materials"/> 
Sequence *	<input type="text" value="0"/>

Fig. 3: Create new ticket status

To create a new ticket status:

1. Click **New** in the top bar.
2. Enter code.
Number between 1 and 1000, which serves as a mnemonic. Appears in the navigation area before the short description. Zeros before a number are ignored (e.g. 00001 becomes 1).
3. Enter a short description.
Appears in the navigation area after the code.
4. Enter a description of the class.
5. Enter sequence order (optional).
6. Click **Save** in the top bar.

To copy a ticket status:

1. Select a ticket status in the navigation area.
2. Click on **Copy** in the upper bar.
- ➔ The name of the class is supplemented by the word **(copy)**. The name can be changed.
3. Edit the ticket status as necessary.
4. Click **Save** in the top bar.

To edit a ticket status:

1. Select a ticket status in the navigation area.
2. Edit the ticket status as necessary.
3. Click **Save** in the top bar.

To delete a ticket status:

1. Select a ticket status in the navigation area.
2. In the upper right part of the screen, click on **Delete** and confirm.

4 Ticket Status Editor

Path: Order Management > Ticket > Ticket Status Editor

The Ticket Status Editor lists all statuses that a ticket can be given. The statuses are predefined and cannot be edited. Only the color can be freely determined by clicking on the respective field. A new color will be adopted directly when it is selected. Saving is not necessary. Existing tickets adopt the new color immediately.

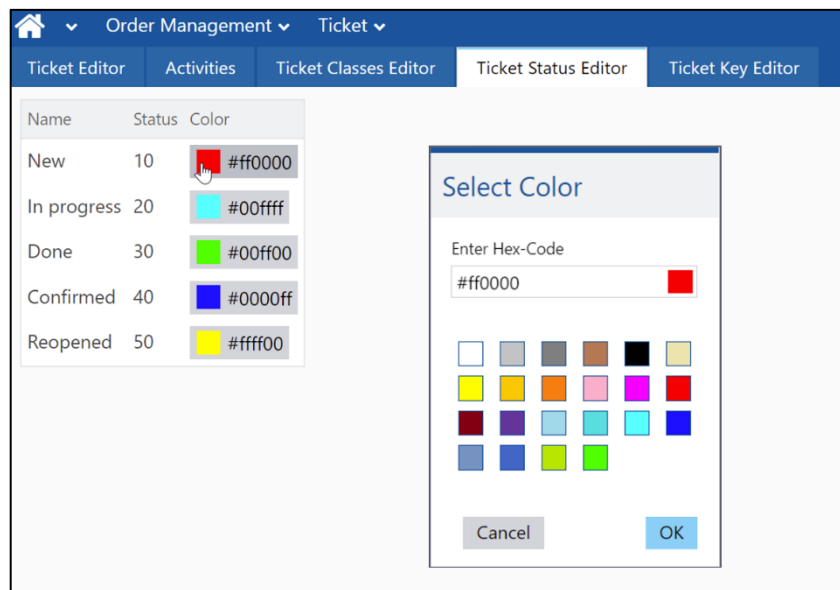


Fig. 4: Color selection for ticket status

5 Annex

5.1 Change log

Table 1: List of all changes since release version 5.9

Date	Type	Description	Section
2021-07-28	Created	Transferred content of this manual from Manual - Performance Analysis and revised according to introductory text	
2021-07-28	Edited	Ticket Editor	2