



Collaboration

ADITO Software GmbH

From version xRM 2026.4.0 | April 2026





Screenshots

The UX design of ADITO is continuously optimised for you. Therefore, there may be deviations in the screenshots.



Agenda – 1/2

Project management

- Overview
- Procedure
- Overview of projects in the FilterView
- Create project
 - Project description
 - Record project team
 - Project-specific ticket attributes
 - Project-specific document storage
 - Standard tabs
- Create ticket in the project
- Overview of projecttickets in the
 - FilterView
 - Tab „Projecttickets“ in the project
- Working with tickets
 - Actions
 - Status
 - Serial Actions
 - Communication via comments/notification
 - Summarize comments supported by AI
 - Link to tickets and other data records
- Export ticket information as CSV
- Time recording
- Project Controlling
- Projects and projecttickets at a glance using dashlets

Agenda – 2/2

Project administration

- Procedure in project administration
 - Overview
 - Relationship between project type, ticket type, ticket attributes
 - Procedure
 - Example
- Define project type
 - Create project type
 - Assign ticket types
 - Adjust ticket attributes if necessary
 - Record ticket attribute values for each project type
 - Reason for ticket status "completed"
 - Authorize project roles
 - Templates for descriptions (project, comments)
- Define ticket type
 - Create ticket type
 - Templates for description (ticket, comments)
 - Assigning ticket attributes
- Define ticket attributes
- Create templates in document templates
- Define export templates for ticket export



Project management

Collaboration



"Overview"

The "Collaboration" menu group essentially offers you **two options**:

- **Create project types** to map different types of project management.
- **create projects** and edit the tickets linked to them.

Two target groups therefore use this menu group:

- **users** who map project management in day-to-day business and
- **Administrators** who define the necessary project types, ticket types and ticket attributes



"Overview"

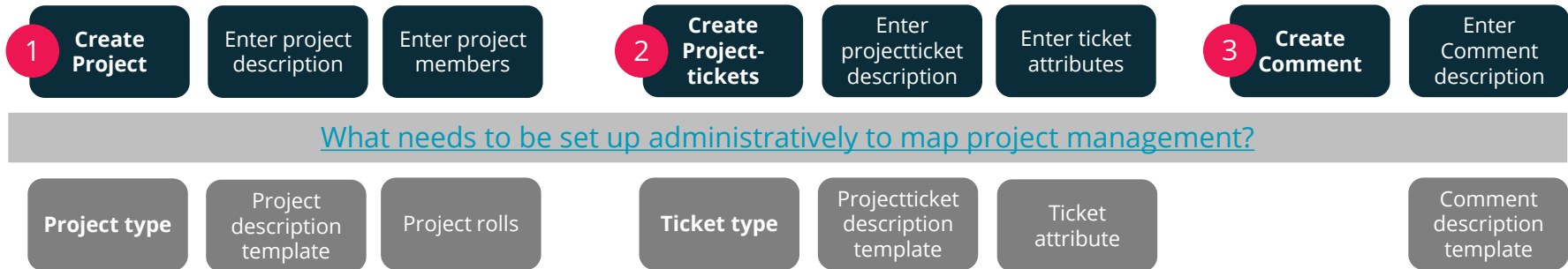
- As part of project administration, the individual projectticket attributes, projectticket types and project types are defined and their possible uses are specified. No programming is required as the changes are made on the user interface.
- All information, activities or documents relating to a project are linked to it and can therefore be viewed in the project itself and at the appropriate point in the linked data record.
- Project members are managed with roles and rights.

Collaboration



Procedure: Create a project with project tickets and comments

Project management procedure



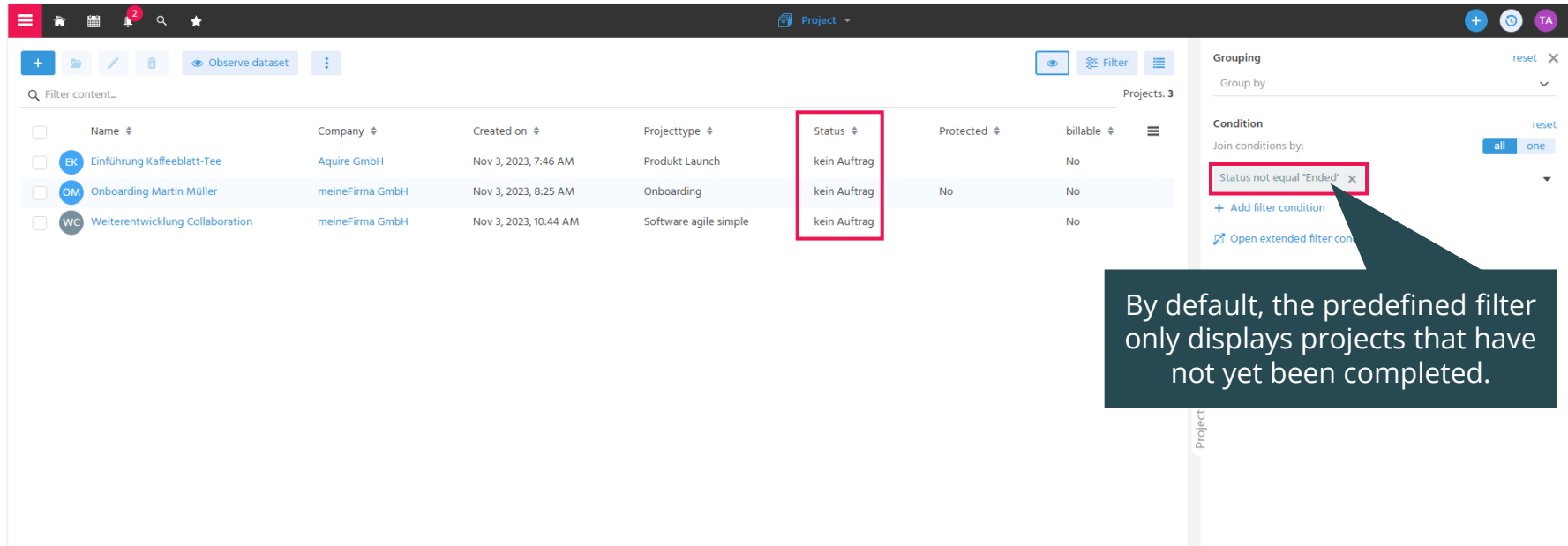
1. **A project** is created with a description and project members.
2. **N projecttickets** can be created in a project. A description of the ticket can also be entered here. To structure the tickets, they can be provided with ticket attributes.
3. In order to communicate with the project team for each project ticket, **n comments** can be entered **for each projectticket**.

Templates can be defined for the project description, projectticket description and comment description, which are automatically pulled or selected by the user.



FilterView

The FilterView gives you an overview of the projects.



Filter content...

	Name	Company	Created on	Projecttype	Status	Protected	billable
☐	EK Einführung Kaffeeblatt-Tee	Aquire GmbH	Nov 3, 2023, 7:46 AM	Produkt Launch	kein Auftrag		No
☐	OM Onboarding Martin Müller	meineFirma GmbH	Nov 3, 2023, 8:25 AM	Onboarding	kein Auftrag	No	No
☐	WC Weiterentwicklung Collaboration	meineFirma GmbH	Nov 3, 2023, 10:44 AM	Software agile simple	kein Auftrag		No

Projects: 3

Grouping

Group by

Condition

Join conditions by:

all one

reset

reset

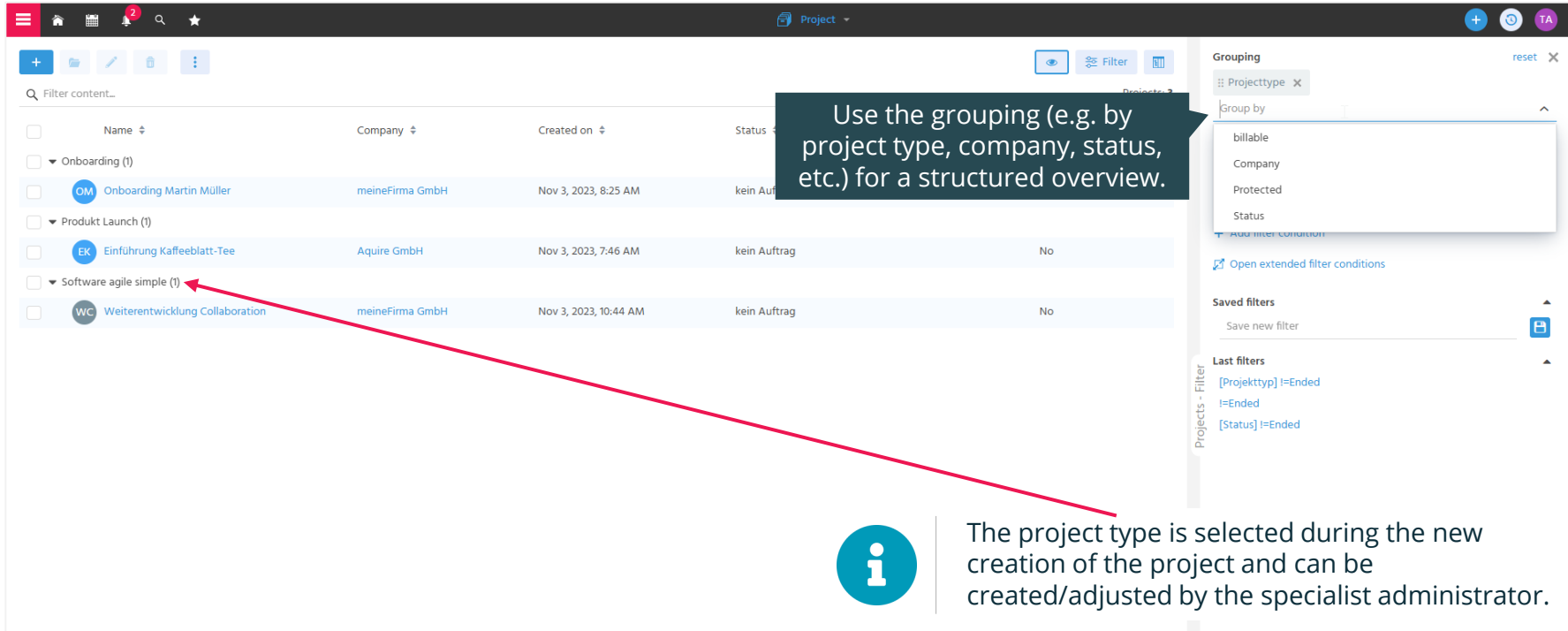
Status not equal "Ended"

+ Add filter condition

Open extended filter condition

By default, the predefined filter only displays projects that have not yet been completed.

FilterView – grouped



Use the grouping (e.g. by project type, company, status, etc.) for a structured overview.

The project type is selected during the new creation of the project and can be created/adjusted by the specialist administrator.

Name	Company	Created on	Status
Onboarding (1)			
Onboarding Martin Müller	meineFirma GmbH	Nov 3, 2023, 8:25 AM	kein Auftrag
Produkt Launch (1)			
Einführung Kaffeeblatt-Tee	Aquire GmbH	Nov 3, 2023, 7:46 AM	kein Auftrag
Software agile simple (1)			
Weiterentwicklung Collaboration	meineFirma GmbH	Nov 3, 2023, 10:44 AM	kein Auftrag

Grouping: Projecttype X

Group by: billable, Company, Protected, Status

Open extended filter conditions

Saved filters: Save new filter

Last filters: [Projekttyp] !=Ended, !=Ended, [Status] !=Ended

Create Project

New creation



The project types are created in the system by the administrator.



If a project type has been newly created in the system, a new registration is required in order to use it for new projects.

Name	Einführung Kaffeeblatt-Tee
Company	Aquire GmbH
Projecttype	Produkt Launch
Status	kein Auftrag
Protected	☐
billable	☐
Description	Choose langu... Paragraph Aⁱ A^e A A B I U ↺ ↻ ↶ ↷ X₂ X² ✎ T_x — ≡ @ 🚩 ⋮ ⋮≡ ≡≡ ≡≡ ≡≡ <> Source 📄 Ω 🖼️ ⬆️ “ ” 🗂️ 📺 📄 ↶ ↷ Bearbeitungszeitraum: 01.10.2022 - 31.12.2022 Produktbeschreibung:  Anlässlich der aktuellen Gespräche im DIN Tee möchten wir über „Kaffeeblatt-Tee“ informieren. Neben der Pulpe der Kaffeekirsche (siehe News vom 02-2022) hat die Europäische Union einen Aufguss aus Kaffeeblättern als neuartiges (traditionelles aus Drittländern stammendes) Lebensmittel in der EU zugelassen. Dieses Erzeugnis kann bereits seit dem 21. Juli 2020 in der EU in Verkehr gebracht werden.
Document	+ Upload file Drop file here ! Filename
Description	
Projectmember	Herr Tim Admin

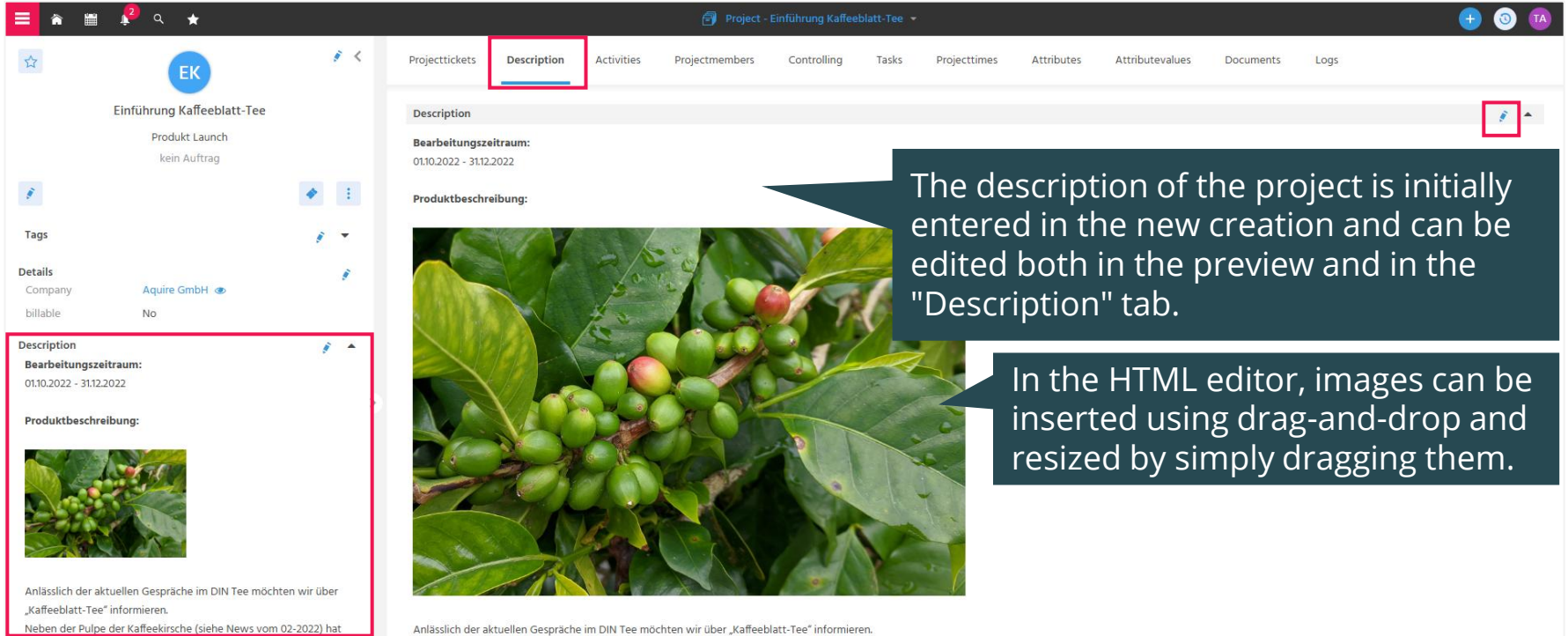
New creation

13

Required value is missing

Project

Project description



The screenshot displays the ADITO project management interface. The top navigation bar includes a menu icon, home, calendar, notifications (2), search, and star icons. The project name 'Project - Einführung Kaffeeblatt-Tee' is shown in the top right. Below the navigation bar, the 'Description' tab is selected and highlighted with a red box. The left sidebar shows project details: 'Einführung Kaffeeblatt-Tee', 'Produkt Launch', 'kein Auftrag', 'Tags', 'Details', 'Company: Aquire GmbH', 'billable: No'. The main content area shows the 'Description' tab with a red box around the edit icon (pencil) in the top right corner. The description text includes 'Bearbeitungszeitraum: 01.10.2022 - 31.12.2022' and 'Produktbeschreibung:'. Below the text is a large image of coffee cherries. A callout box points to the edit icon, stating: 'The description of the project is initially entered in the new creation and can be edited both in the preview and in the "Description" tab.' Another callout box points to the image, stating: 'In the HTML editor, images can be inserted using drag-and-drop and resized by simply dragging them.'

Project: Einführung Kaffeeblatt-Tee

Projecttickets **Description** Activities Projectmembers Controlling Tasks Projecttimes Attributes Attributevalues Documents Logs

Description

Bearbeitungszeitraum:
01.10.2022 - 31.12.2022

Produktbeschreibung:



The description of the project is initially entered in the new creation and can be edited both in the preview and in the "Description" tab.

In the HTML editor, images can be inserted using drag-and-drop and resized by simply dragging them.

Description

Bearbeitungszeitraum:
01.10.2022 - 31.12.2022

Produktbeschreibung:



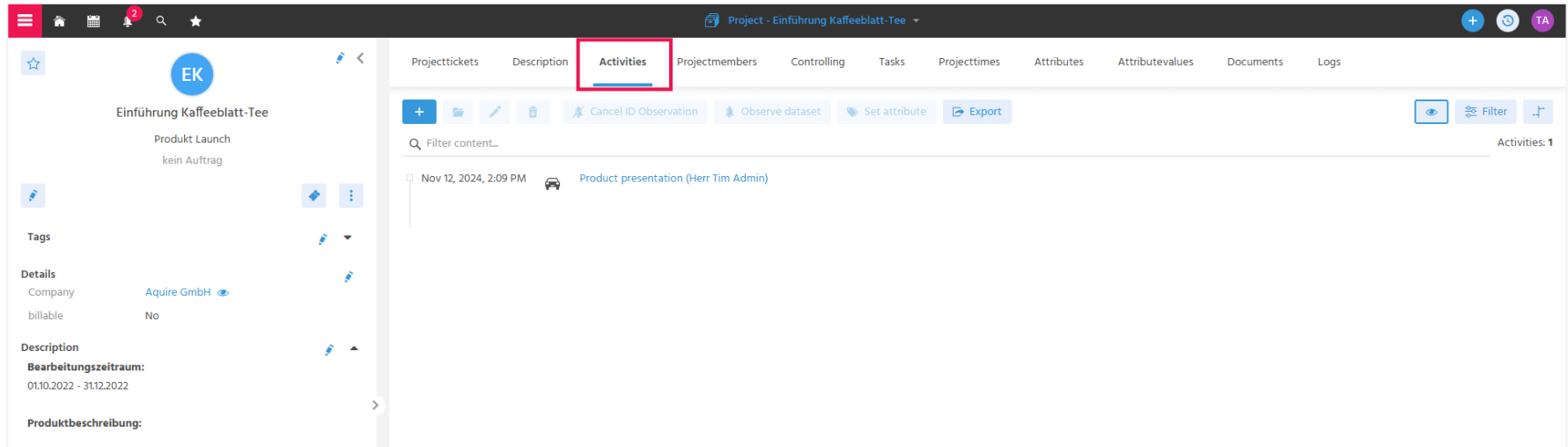
Anlässlich der aktuellen Gespräche im DIN Tee möchten wir über „Kaffeeblatt-Tee“ informieren.
Neben der Pulpe der Kaffeeirsche (siehe News vom 02-2022) hat

Project

Links to activities

Activities that are entered here using the new creation button are automatically linked to the project only.

Links to other contexts (company, contact, etc.) must be added **manually**.

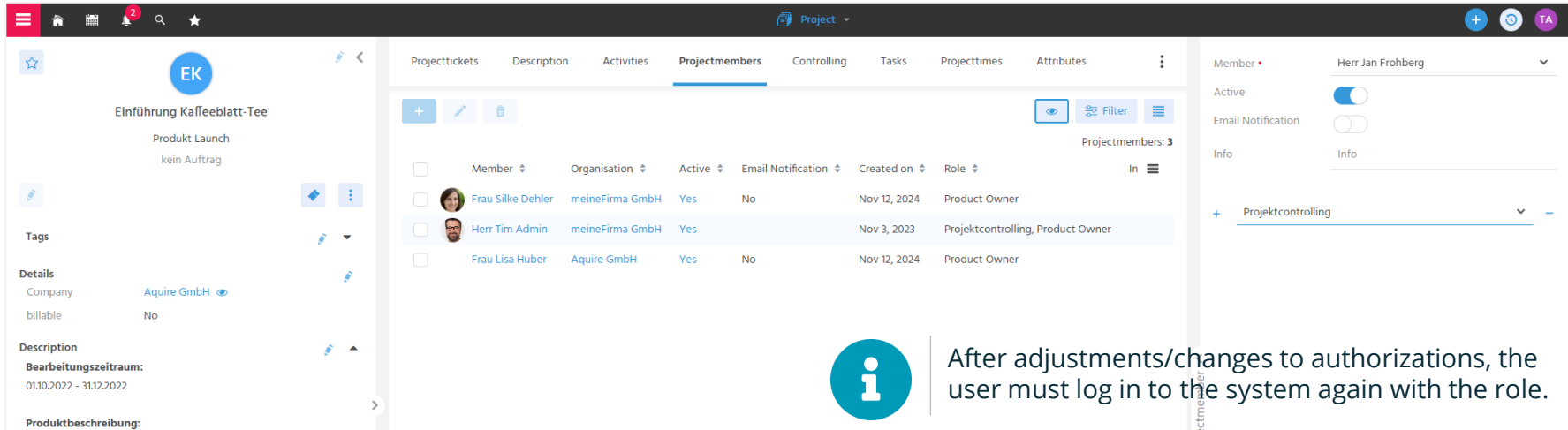


The screenshot displays the ADITO Project interface. On the left, a sidebar shows the project details for 'Einführung Kaffeeblatt-Tee' (Product Launch, no order). The main area is divided into tabs: Projecttickets, Description, **Activities** (highlighted with a red box), Projectmembers, Controlling, Tasks, Projecttimes, Attributes, Attributevalues, Documents, and Logs. Below the tabs, there is a toolbar with buttons for '+', 'Filter content...', 'Cancel ID Observation', 'Observe dataset', 'Set attribute', and 'Export'. A list of activities is shown below the toolbar, with one entry: 'Nov 12, 2024, 2:09 PM' followed by a car icon and the text 'Product presentation (Herr Tim Admin)'. The right side of the interface shows 'Activities: 1'.

Project

Overview of the projectmembers

- Enter projectmembers who are involved in the implementation of the project with a role.
- All contacts available in the system can be added as projectmembers.
- Depending on the role, the projectmembers can edit tickets (the role configuration and which authorization they have in the project is defined by the administrator in the project type).



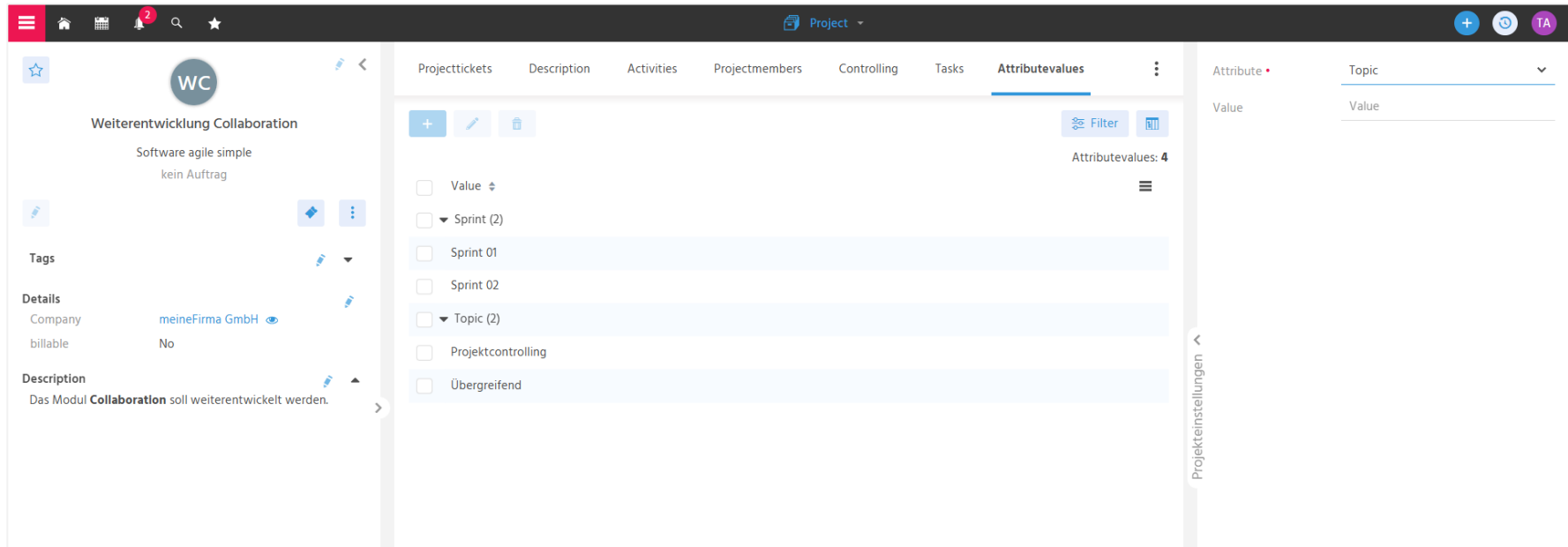
The screenshot displays the ADITO Project Management interface. On the left, a sidebar shows project details for 'Einführung Kaffeeblatt-Tee', including tags, details (Company: Aquire GmbH, billable: No), and description (Bearbeitungszeitraum: 01.10.2022 - 31.12.2022). The main area is titled 'Project' and contains a tabbed interface with 'Projectmembers' selected. Below the tabs is a table of project members with columns for Member, Organisation, Active, Email Notification, Created on, and Role. The table lists three members: Frau Silke Dehler, Herr Tim Admin, and Frau Lisa Huber, all from 'meineFirma GmbH' or 'Aquire GmbH'. To the right of the table is a sidebar for 'Herr Jan Froberg' with toggle switches for 'Active' and 'Email Notification', and a dropdown for 'Info'. A red information icon is overlaid on the bottom right of the screenshot.

Member	Organisation	Active	Email Notification	Created on	Role
☐ Frau Silke Dehler	meineFirma GmbH	Yes	No	Nov 12, 2024	Product Owner
☐ Herr Tim Admin	meineFirma GmbH	Yes		Nov 3, 2023	Projektcontrolling, Product Owner
☐ Frau Lisa Huber	Aquire GmbH	Yes	No	Nov 12, 2024	Product Owner

After adjustments/changes to authorizations, the user must log in to the system again with the role.

Maintenance of project-specific ticket attribute values

If necessary, the values for projectticket attributes are entered here on a project-specific basis.



The screenshot displays the ADITO Project interface. The left sidebar shows the project details for 'Weiterentwicklung Collaboration', including the company 'meineFirma GmbH' and the description 'Das Modul Collaboration soll weiterentwickelt werden.' The main area is divided into tabs: Projecttickets, Description, Activities, Projectmembers, Controlling, Tasks, and Attributevalues. The 'Attributevalues' tab is active, showing a list of attributes with checkboxes. The attributes are: Value, Sprint (2), Sprint 01, Sprint 02, Topic (2), Projektcontrolling, and Übergreifend. The 'Value' attribute is selected. The right sidebar shows the 'Attribute' and 'Topic' dropdowns, both set to 'Value'.

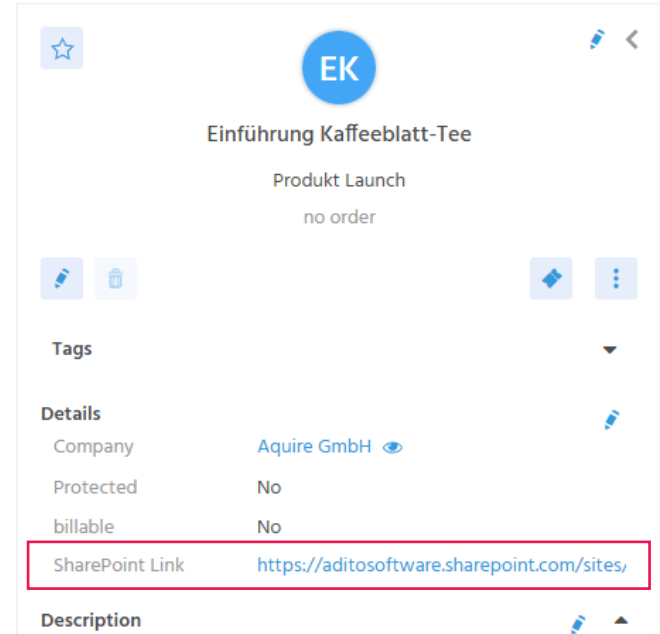
Attribute	Topic
Value	Value

Project

Project-specific document storage

Documents related to the project can be

- stored as binary files in the standard **'Documents' tab**, or
- via a **SharePoint link** in the 'Details' section of the project preview. This means that a SharePoint folder can be accessed directly from ADITO.



The screenshot shows the ADITO project details page for a project named "Einführung Kaffeeblatt-Tee". The page includes a star icon, a blue circular profile picture with "EK", and a back arrow. Below the project name, it says "Produkt Launch" and "no order". There are icons for editing and deleting. The "Tags" section is empty. The "Details" section contains a table with the following information:

Company	Aquire GmbH	👁
Protected	No	
billable	No	
SharePoint Link	https://aditosoftware.sharepoint.com/sites/	

The "SharePoint Link" row is highlighted with a red border. Below the details is a "Description" section with an edit icon and a dropdown arrow.

Project



Standard tabs

- **"Tasks" tab:** Overview of linked tasks
- **"Attributes" tab:** Entry of any additional information that can be defined as attributes in the system
- **"Documents" tab:** Storage for binary files
- **"Logs" tab:** List of changes made to the data set

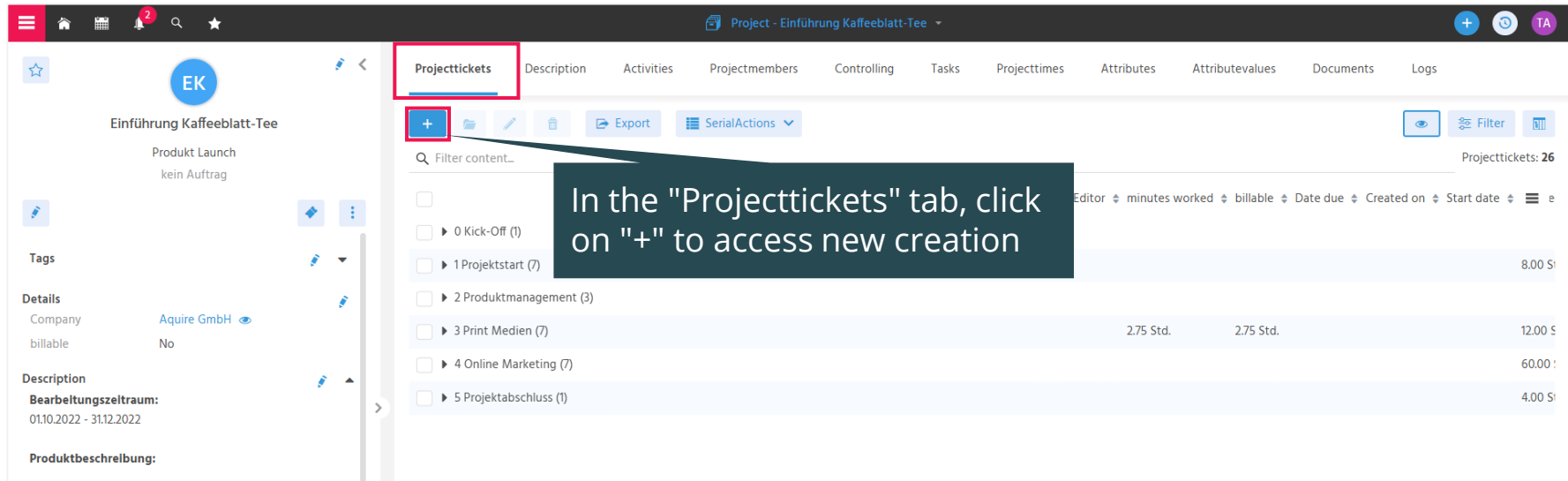


Create ticket in the project

Projectticket

New creation – option 1

You have the MainView of the project open and need a new ticket.



Project - Einführung Kaffeeblatt-Tee

Projecttickets | Description | Activities | Projectmembers | Controlling | Tasks | Projecttimes | Attributes | Attributevalues | Documents | Logs

Filter content...

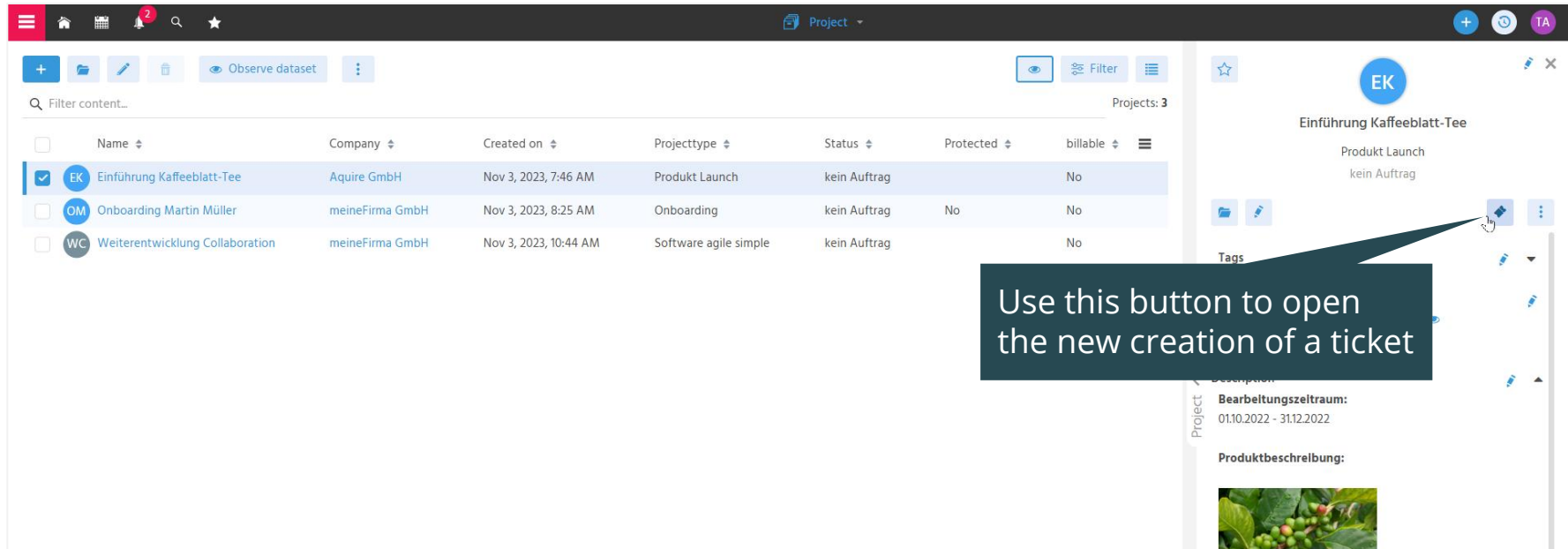
Projecttickets: 26

Editor | minutes worked | billable | Date due | Created on | Start date | e

☐	0 Kick-Off (1)					
☐	1 Projektstart (7)					8.00 \$
☐	2 Produktmanagement (3)					
☐	3 Print Medien (7)	2.75 Std.	2.75 Std.			12.00 \$
☐	4 Online Marketing (7)					60.00 \$
☐	5 Projektabschluss (1)					4.00 \$

New creation – option 2

You have the project preview open and need a new ticket.



The screenshot shows the Projectticket application interface. On the left, there is a table of projects. On the right, there is a project preview for 'Einführung Kaffeeblatt-Tee'. A callout box points to a button in the project preview, indicating how to open a new ticket.

	Name	Company	Created on	Projecttype	Status	Protected	billable
☒	EK Einführung Kaffeeblatt-Tee	Aquire GmbH	Nov 3, 2023, 7:46 AM	Produkt Launch	kein Auftrag		No
☐	OM Onboarding Martin Müller	meineFirma GmbH	Nov 3, 2023, 8:25 AM	Onboarding	kein Auftrag	No	No
☐	WC Weiterentwicklung Collaboration	meineFirma GmbH	Nov 3, 2023, 10:44 AM	Software agile simple	kein Auftrag		No

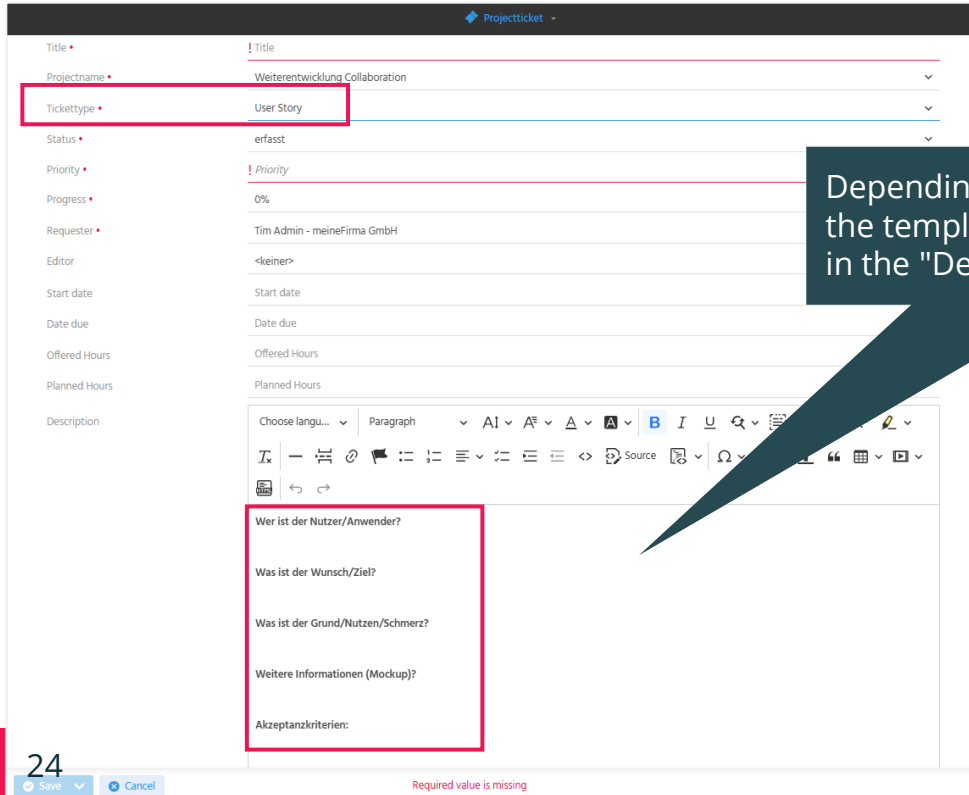
Project: 3

Use this button to open the new creation of a ticket

The projectticket attributes are stored administratively for each ticket type.

23

Templates for the "Description" field depending on the ticket type



The screenshot shows a web form for creating a project ticket. The 'Tickettype' dropdown is highlighted with a red box and set to 'User Story'. The 'Description' field is also highlighted with a red box and contains a template with the following text:

Wer ist der Nutzer/Anwender?

Was ist der Wunsch/Ziel?

Was ist der Grund/Nutzen/Schmerz?

Weitere Informationen (Mockup)?

Akzeptanzkriterien:

At the bottom of the form, there is a red error message: 'Required value is missing'.

Depending on the ticket type selected, the template is automatically inserted in the "Description" field.

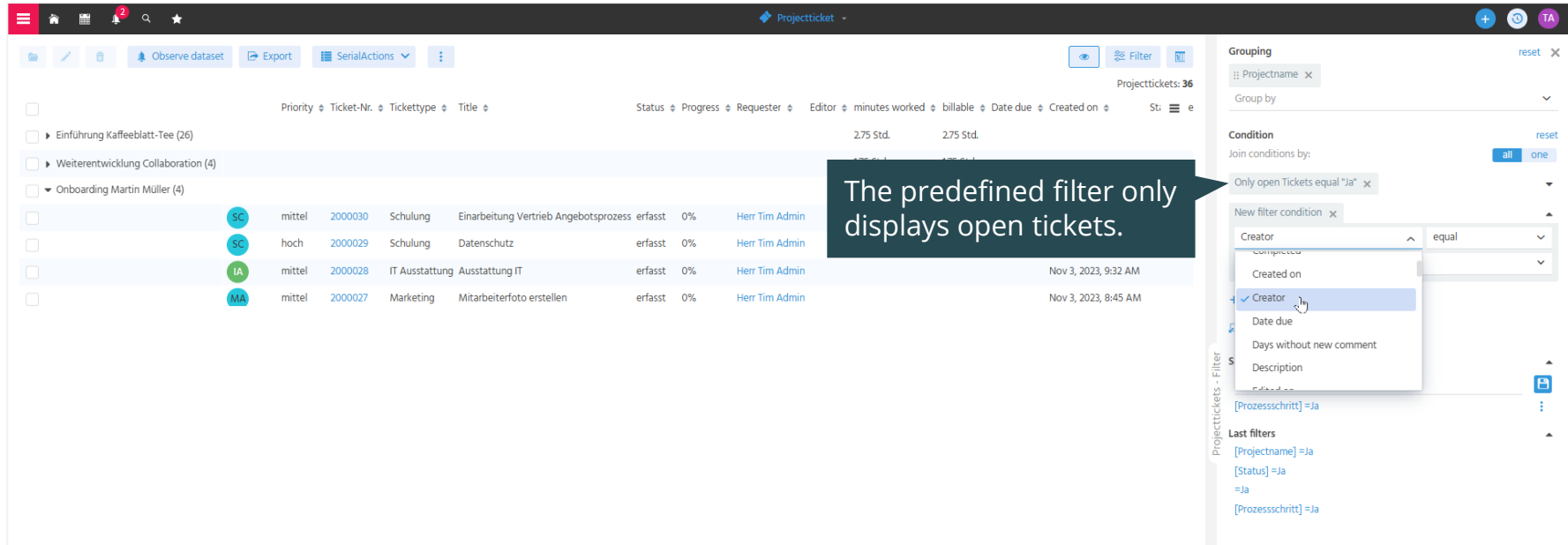


The templates are stored administratively for each ticket type.

Overview of the projecttickets

Working with tickets – FilterView

In the FilterView, all projecttickets from all projects are displayed and can be filtered/grouped.



The screenshot displays the 'Projectticket' application's FilterView. The main area shows a table of tickets with columns for Priority, Ticket-Nr., Tickettype, Title, Status, Progress, Requester, Editor, minutes worked, billable, Date due, and Created on. A callout box points to the 'Only open Tickets equal "Ja"' condition in the filter sidebar, stating: 'The predefined filter only displays open tickets.'

Table Data:

Priority	Ticket-Nr.	Tickettype	Title	Status	Progress	Requester	Editor	minutes worked	billable	Date due	Created on
mittel	2000030	Schulung	Einarbeitung Vertrieb Angebotsprozess	erfasst	0%	Herr Tim Admin		2.75 Std.	2.75 Std.		
hoch	2000029	Schulung	Datenschutz	erfasst	0%	Herr Tim Admin					
mittel	2000028	IT Ausstattung	Ausstattung IT	erfasst	0%	Herr Tim Admin					Nov 3, 2023, 9:32 AM
mittel	2000027	Marketing	Mitarbeiterfoto erstellen	erfasst	0%	Herr Tim Admin					Nov 3, 2023, 8:45 AM

Filter Sidebar (Right):

- Grouping:** Projectname (reset)
- Condition:** Join conditions by: all, one (reset)
- Only open Tickets equal "Ja"** (x)
- New filter condition:** Creator (selected), equal (selected)
- Last filters:** [Projectname] =Ja, [Status] =Ja, [Prozessschritt] =Ja

Project



Overview of the projecttickets

In the MainView of the project, all linked projecttickets are displayed in the "Projecttickets" tab.

The projecttickets have projectticket attributes according to which they can be grouped. You can use the filter functions (group and filter) to map the structures required for project implementation (e.g. all open tickets should be displayed and grouped by sprint and editor).

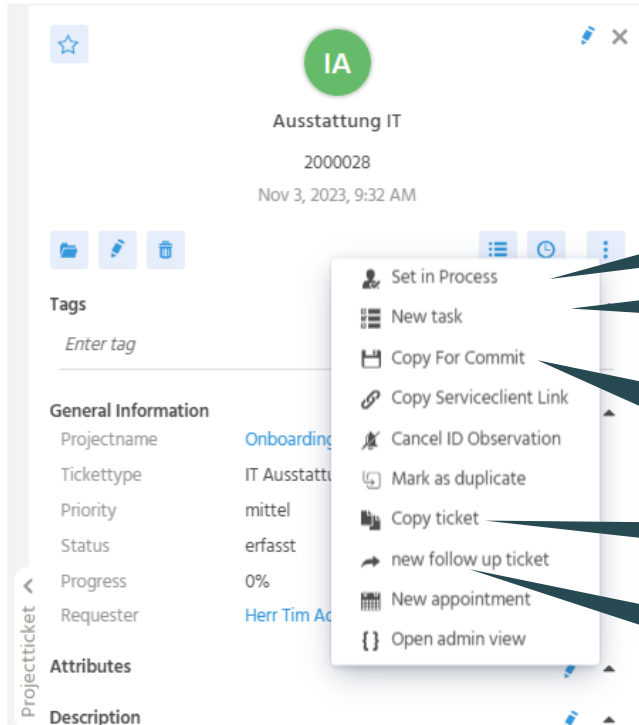
The screenshot displays the ADITO Project interface for a project named "Einführung Kaffeeblatt-Tee". The "Projecttickets" tab is active, showing a list of tickets. The table columns include Priority, Ticket-Nr., Tickettype, Title, Status, and Progr. The tickets are grouped by "Kick-Off", "Produktmanagement", "Print Medien", "Online Marketing", and "Projektabschluss".

The right-hand panel shows the "Grouping" and "Condition" settings. The "Group by" dropdown is set to "Prozessschritt". The "Condition" dropdown is set to "Only open Tickets equal 'Ja'". The "Saved filters" section shows a filter named "[Prozessschritt] = Ja".

Priority	Ticket-Nr.	Tickettype	Title	Status	Progr.
0	Kick-Off (1)				
AU	kritisch	2000000	Aufgabe	Durchführung Kick-off	in Bearbeitung
1	Projektstart (7)				
2	Produktmanagement (3)				
AU	kritisch	2000019	Aufgabe	Produkt- und Moodabbildungen erfasst	0%
AU	hoch	2000017	Aufgabe	Packaging Shooting - Rendering erfasst	0%
AU	hoch	2000016	Aufgabe	Aufnahme in PIM erfasst	0%
3	Print Medien (7)				
4	Online Marketing (7)				
5	Projektabschluss (1)				

Working with tickets

Working with tickets – Further actions



The screenshot shows the Projectticket interface. At the top, there's a star icon, a green circle with 'IA', and the ticket title 'Ausstattung IT' with ID '2000028' and date 'Nov 3, 2023, 9:32 AM'. Below this are icons for folder, edit, and trash. A 'Tags' section has an 'Enter tag' input. The 'General Information' section lists: Projectname (Onboarding), Tickettype (IT Ausstattung), Priority (mittel), Status (erfasst), Progress (0%), and Requester (Herr Tim A...). The 'Attributes' section shows 'Description'. A context menu is open over the ticket, listing actions: Set in Process, New task, Copy For Commit, Copy Serviceclient Link, Cancel ID Observation, Mark as duplicate, Copy ticket, new follow up ticket, New appointment, and Open admin view.

Changes the status to "in progress"

Creates new task with link to projectticket

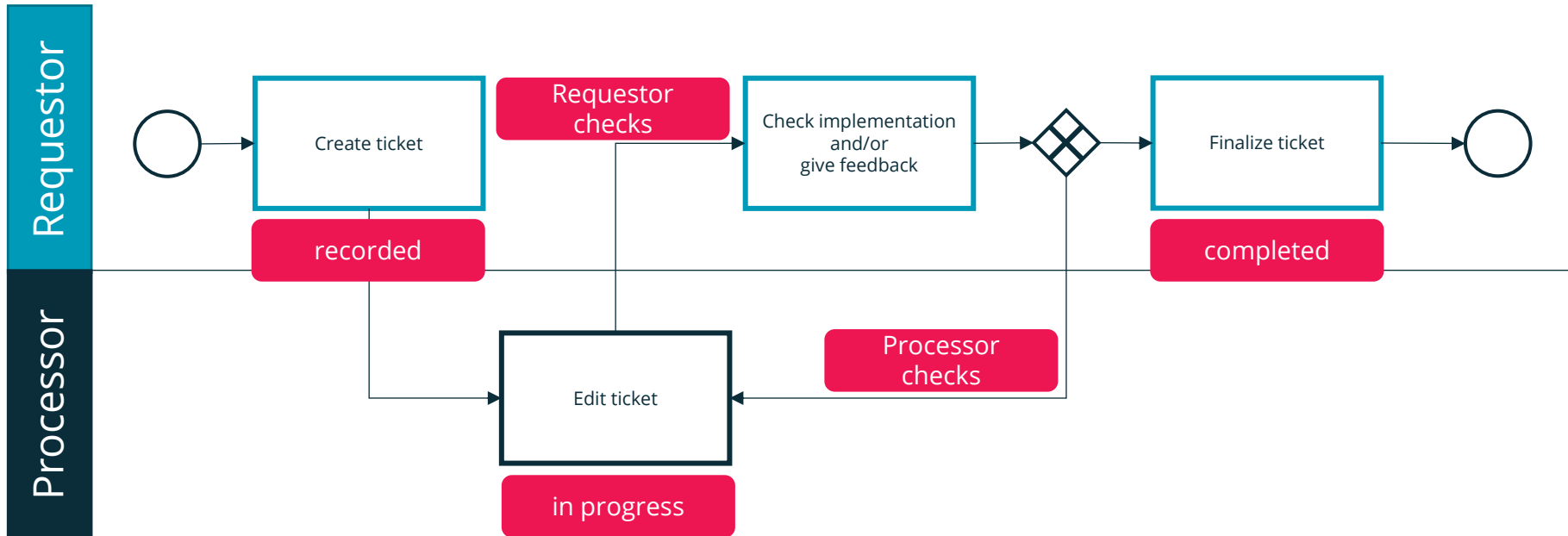
Copies the expression `[Project: Onboarding Martin Müller][TicketNo.: 2000028][Equipment IT]` to the clipboard so that the ticket can be clearly referenced.

Creates a copy of the projectticket.

Creates a new projectticket with the link type "Successor of" to the original ticket.

Projectticket

Working with tickets – Ticket status



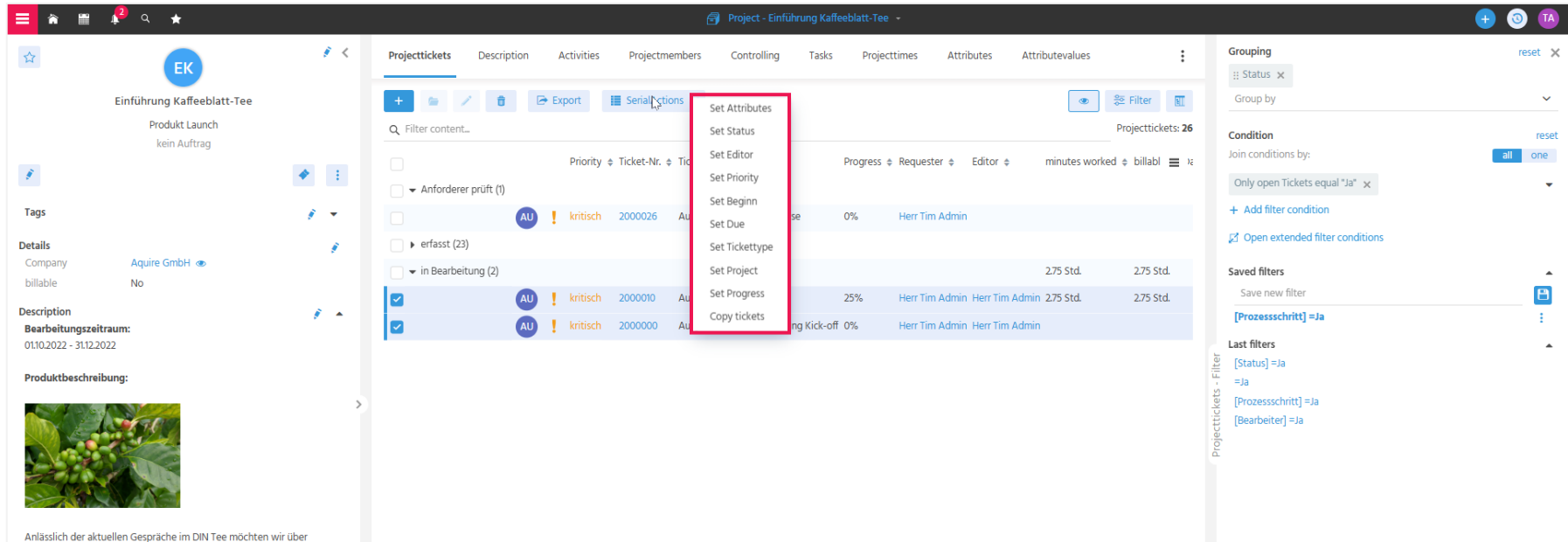
Working with tickets – Ticket status

- **Created** – is initially preset and is not adjusted by the requester when the ticket is created.
- **In progress** – is set by the editor as soon as they perform the “Set in process” action. OR if the editor sets the status manually in the preview. An editor must be entered (the “editor” field is marked as a mandatory field as soon as the “In progress” status is set).
- **Requester checks** – is set by the editor as soon as they need feedback from the requester.
- **Editor checks** – is set as soon as the editor has to check the ticket; the “editor” field is again a mandatory field.
- **Completed** – is set as soon as everything has been completed.

Projectticket

Working with tickets – serial actions

To set a value in several projecttickets at the same time, use the serial actions:

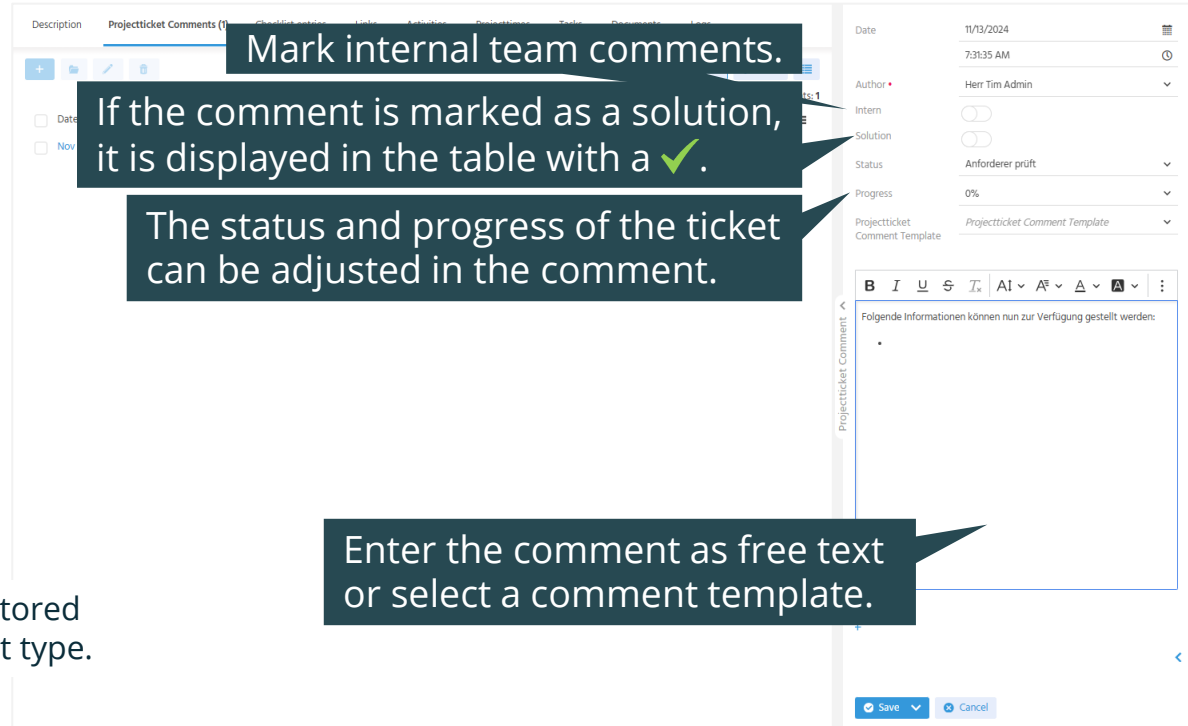


The screenshot displays the Projectticket application interface. On the left, a sidebar shows the project details for 'Einführung Kaffeeblatt-Tee', including a description and a product image. The main area shows a list of project tickets. A red box highlights the 'Serial Actions' menu, which is open, showing options like 'Set Attributes', 'Set Status', 'Set Editor', 'Set Priority', 'Set Begin', 'Set Due', 'Set Tickettype', 'Set Project', 'Set Progress', and 'Copy tickets'. The right sidebar shows the 'Grouping' and 'Condition' sections, with a filter set to 'Only open Tickets equal "Ja"'. The bottom of the interface has a red bar with the text 'Anlässlich der aktuellen Gespräche im DIN Tee möchten wir über'.

Projecttickets	Description	Activities	Projectmembers	Controlling	Tasks	Projecttimes	Attributes	Attributevalues
☐	Priority	Ticket-Nr.	Ticket	Progress	Requester	Editor	minutes worked	billabl
☐	Anforderer prüft (1)							
☐	AU	kritisch	2000026	AU				
☐	erfasst (23)							
☐	in Bearbeitung (2)							
☒	AU	kritisch	2000010	AU				
☒	AU	kritisch	2000000	AU				

Communication within a ticket: Projectticket Comment

In comments, you enter information about the ticket (queries, votes, etc.), so this information is located directly in the ticket (comments and attachments) and does not have to be collected from external sources.



The screenshot shows the 'Projectticket Comments' form. It includes a table for comments with columns for Date, Author, Intern, Solution, Status, Progress, and Projectticket Comment Template. Callouts explain the following features:

- Mark internal team comments.** (Points to the 'Intern' checkbox)
- If the comment is marked as a solution, it is displayed in the table with a ✓.** (Points to the 'Solution' checkbox)
- The status and progress of the ticket can be adjusted in the comment.** (Points to the 'Status' and 'Progress' dropdowns)
- Enter the comment as free text or select a comment template.** (Points to the 'Projectticket Comment Template' dropdown)

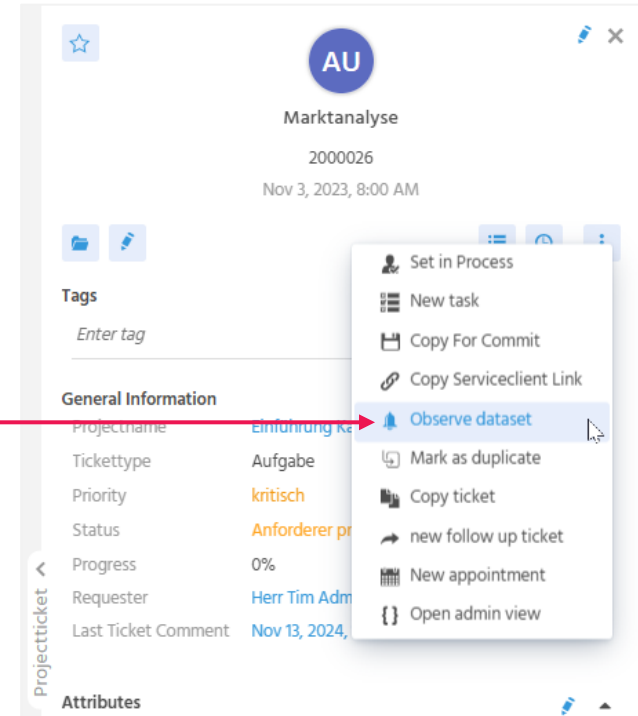
The form also includes a text area for the comment content, a 'Save' button, and a 'Cancel' button.



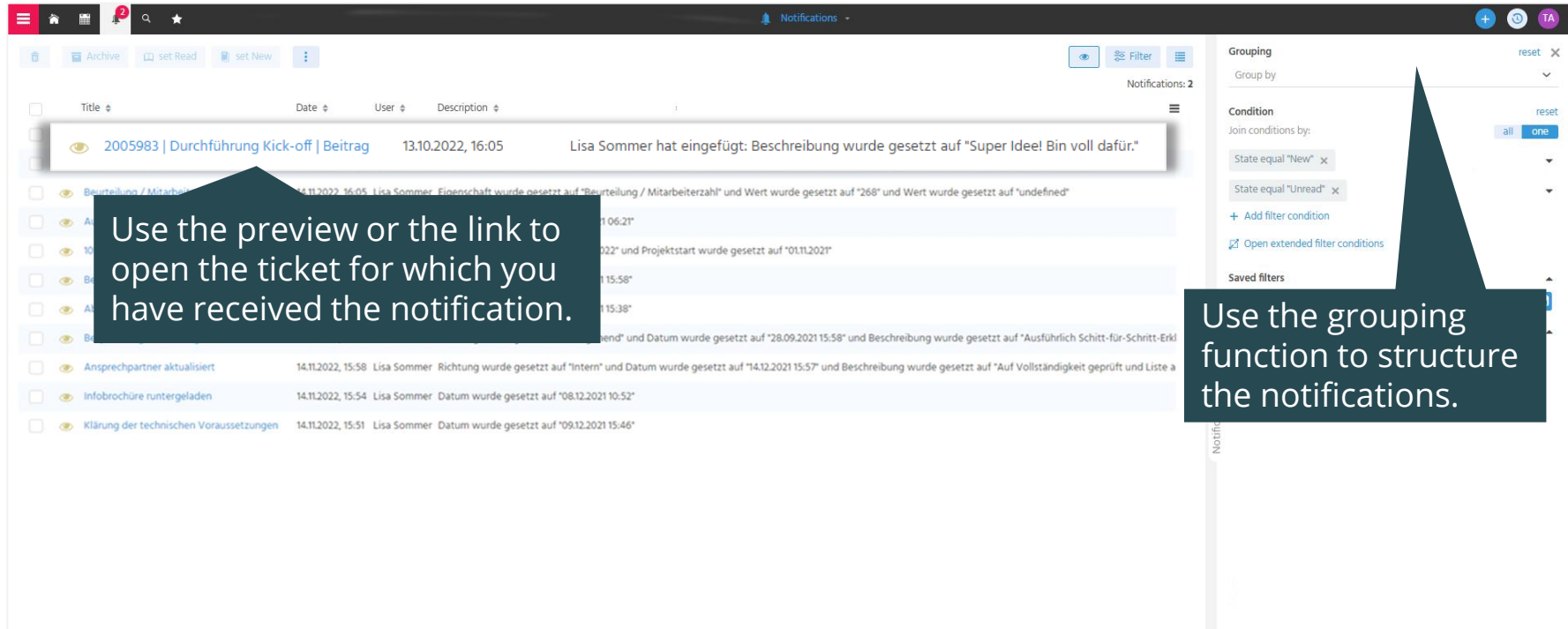
The comment templates are stored administratively for each ticket type.

Communication within a ticket: Observations

- When you create a ticket, you are automatically entered as an observer.
- As soon as someone changes something on the ticket or creates a comment, the observers are notified (message in the notifications) and can give feedback accordingly with a comment.
- Any other user can set observations for tickets with the standard actions in the system.
- To receive notifications **for all tickets in the project, monitor the project.**



Communication within a ticket: Notifications



The screenshot shows the 'Notifications' section of the Projectticket application. The main area displays a list of notifications with columns for Title, Date, User, and Description. A callout points to a notification entry, stating: 'Use the preview or the link to open the ticket for which you have received the notification.' The right sidebar contains a 'Grouping' panel with options for 'Group by' and 'Condition'. A second callout points to this panel, stating: 'Use the grouping function to structure the notifications.'

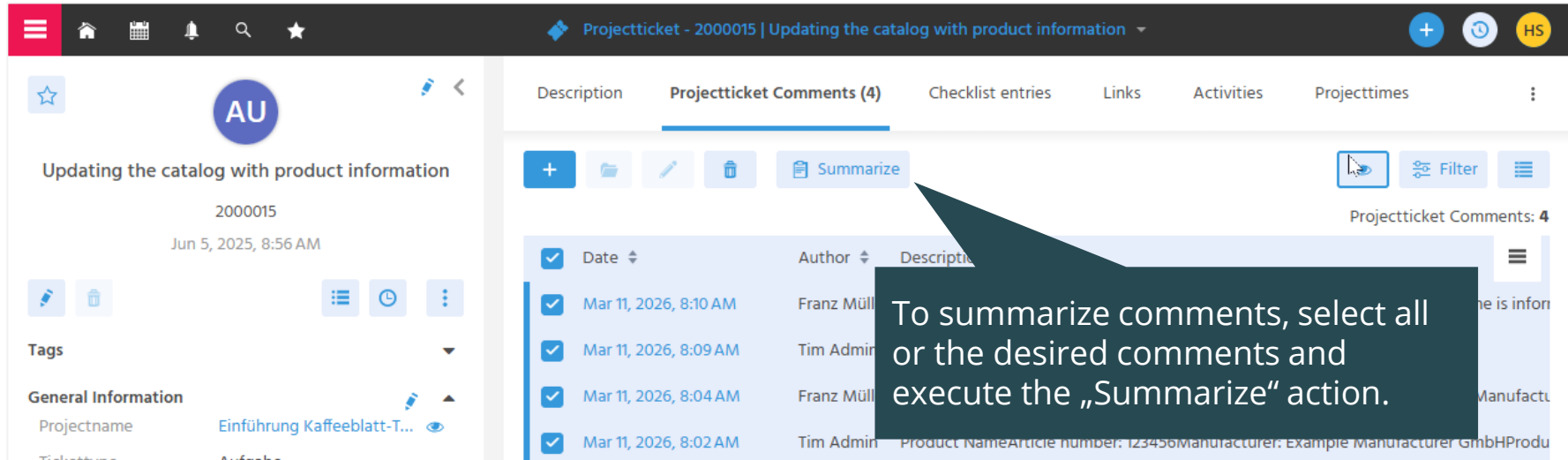
Title	Date	User	Description
2005983 Durchführung Kick-off Beitrag	13.10.2022, 16:05	Lisa Sommer	Lisa Sommer hat eingefügt: Beschreibung wurde gesetzt auf "Super Idee! Bin voll dafür."
Beurteilung / Mitarbeiterzahl	14.11.2022, 16:05	Lisa Sommer	Eigenschaft wurde gesetzt auf "Beurteilung / Mitarbeiterzahl" und Wert wurde gesetzt auf "268" und Wert wurde gesetzt auf "undefined"
A...	11.06.21		
10...	2022" und Projektstart wurde gesetzt auf "01.11.2021"		
Be...	11.15.58"		
Al...	11.15.38"		
Be...	send" und Datum wurde gesetzt auf "28.09.2021 15:58" und Beschreibung wurde gesetzt auf "Ausführlich Schritt-für-Schritt-Erkl		
Ansprechpartner aktualisiert	14.11.2022, 15:58	Lisa Sommer	Richtung wurde gesetzt auf "Intern" und Datum wurde gesetzt auf "14.12.2021 15:57" und Beschreibung wurde gesetzt auf "Auf Vollständigkeit geprüft und Liste a
Infobroschüre heruntergeladen	14.11.2022, 15:54	Lisa Sommer	Datum wurde gesetzt auf "08.12.2021 10:52"
Klärung der technischen Voraussetzungen	14.11.2022, 15:51	Lisa Sommer	Datum wurde gesetzt auf "09.12.2021 15:46"

Communication within a ticket: Summarize comments supported by AI



To use the AI function for summarizing comments, **the AI modules must be used.**

If the AI modules are not used, the “Summarize” button will not be displayed in the “Projectticket Comments” tab.



The screenshot shows the Projectticket interface for ticket 2000015, titled "Updating the catalog with product information". The left sidebar shows the ticket details, including the title, ID, and creation date. The main area displays the "Projectticket Comments (4)" tab, which contains a list of comments. A callout box points to the "Summarize" button, indicating that this action is used to summarize the comments.

Projectticket - 2000015 | Updating the catalog with product information

Updating the catalog with product information

2000015

Jun 5, 2025, 8:56 AM

Tags

General Information

Projectname Einführung Kaffeeblatt-T...

Ticketnummer Aufgabo

Description Projectticket Comments (4) Checklist entries Links Activities Projecttimes

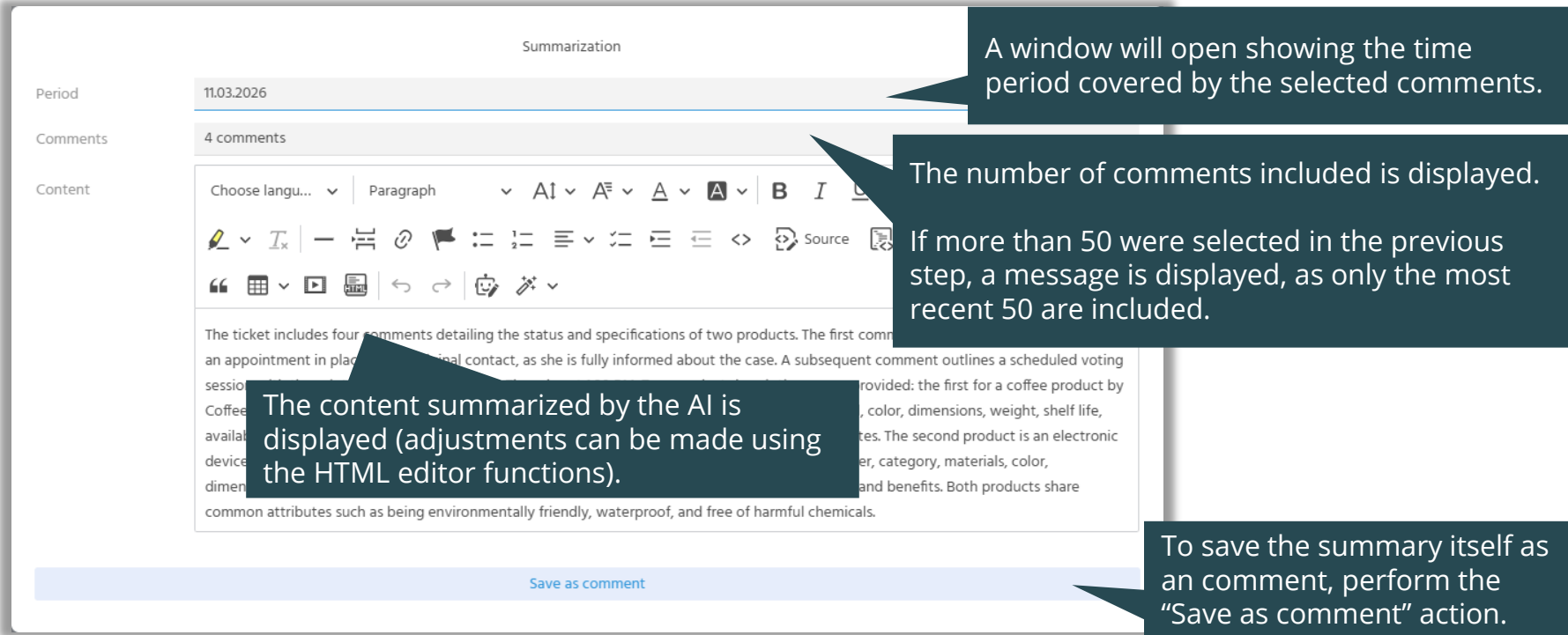
+ [Icon] [Icon] [Icon] Summarize [Icon] Filter [Icon]

Projectticket Comments: 4

Date	Author	Description
Mar 11, 2026, 8:10 AM	Franz Müll	
Mar 11, 2026, 8:09 AM	Tim Admin	
Mar 11, 2026, 8:04 AM	Franz Müll	
Mar 11, 2026, 8:02 AM	Tim Admin	Product NameArticle number: 123456Manufacturer: Example Manufacturer GmbHProduct

To summarize comments, select all or the desired comments and execute the „Summarize“ action.

Summarize comments supported by AI



Summarization

Period: 11.03.2026

Comments: 4 comments

Content: Choose langu... Paragraph AI A A B I

The ticket includes four comments detailing the status and specifications of two products. The first comment describes an appointment in place with a personal contact, as she is fully informed about the case. A subsequent comment outlines a scheduled voting session. The second product is an electronic device, color, dimensions, weight, shelf life, availability, category, materials, color, and benefits. Both products share common attributes such as being environmentally friendly, waterproof, and free of harmful chemicals.

Save as comment

A window will open showing the time period covered by the selected comments.

The number of comments included is displayed.

If more than 50 were selected in the previous step, a message is displayed, as only the most recent 50 are included.

The content summarized by the AI is displayed (adjustments can be made using the HTML editor functions).

To save the summary itself as an comment, perform the "Save as comment" action.

The screenshot displays the Projecticket application interface. On the left, a sidebar shows navigation options: '2000015 | Updating the catalog with product information', 'Projecticket Comment', and 'Projecticket Comment'. The main content area is titled 'Projecticket Comments (4)' and contains a table with columns for Date, Author, and Description. The table lists four comments from March 11, 2026, by Franz Müller and Tim Admin. A callout box points to the 'Description' column, stating: 'The new creation view for the comments opens.' Below the table, a detailed view of a comment is shown, including a 'Summary of 11.03.2026:' and a paragraph of text. A green highlight is placed at the end of the text, with a callout box stating: 'The description ends with the addition “KI created,” so that it is clear that the text was generated by AI.' The bottom of the interface shows a 'Save' button and a 'Cancel' button.

Projectticket



Links

Link all relevant data to the project ticket:

- in the "Links" tab: Projecttickets*, companies, contacts, opportunities, offers, receipts, products, campaigns
- in separate tabs: activities, tasks, documents

* Projecttickets are listed in the „Lower Level Projecttickets" table if a hierarchy/structure of tickets is mapped with the ticket types.

* Projecttickets are listed in the „Projectticket Links" table if they are manually linked to the projectticket.

* Projecttickets are listed in the „Lower Level Projecttickets“ table if a hierarchy/structure of tickets is mapped with the ticket types.

Lower Level Projecttickets

Priority	Ticket-Nr.	Tickettype	Title	Status	Progress	Requester	Editor	Projectname
US	mittel 2000033	User Story	Aktion "Fakturierbar ändern"	erfasst	0%	Herr Tim Admin		Weiterentwicklung Colla
US	mittel 2000032	User Story	Erzeugen von Leistungsnachweisen	erfasst	0%	Herr Tim Admin		Weiterentwicklung Colla

Projectticket Relations: 0

Projectticket Links 3.0

Other Links

No data present

No data present

Links: 0

Required value is missing

Save Cancel



Export ticket information (CSV file)

Export ticket information

Perform export

In order to be able to process ticket information in Excel as part of project management, for example, it can be exported using an export template.

You can find the “Export” action

- in the FilterView of the projectticket or
 - in the “Projecttickets” tab in the project.
1. You filter and select the project tickets that you want to export.
 2. Execute the “Export” action and select an export template.
 3. You will then find the CSV file in the notifications.



Export templates can be added/edited by the administrator.
See [“Define export templates for ticket export”](#)



General information on the subject of “CSV export” and the creation of export templates can be found in the separate documentation.

Time recording

Time recording

Record time entry

The time required to complete the ticket can be recorded in the ticket.

This makes it possible to collect statistical values (e.g. total or detailed effort volume) for the ticket or project.

You can find possible entry points for recording the time:

- (as editor) in the **projectticket**
 - in the **preview**: “**New time booking**” action
 - in the “Time bookings” tab: “New creation” action
- (as controller) in the project
 - in the “Controlling” tab in the “Time bookings” tab: “New creation” action

Employee • Herr Tim Admin

Date • 11/13/2024

8:14 AM

Projectticket • Marktanalyse

booked • ! 0:00

Description • ! Description

Away ☐

Status Anforderer prüft

Progress 0%

The status and progress of the ticket can be adjusted during time recording.

Required value is missing

Save Cancel

Time recording

View Projecttimes

- The times can be viewed in the „Projecttimes" tab in the Projectticket.
- The time bookings can be viewed in the following places in the project:
 - in the “Project tickets” tab, the booked time is displayed for each project ticket.
 - All time bookings from all project tickets are listed in the “Time bookings” tab.
 - In the “Controlling” tab, all project tickets for which unchecked time bookings have been recorded are displayed and can be viewed and controlled individually.

Description	Projectticket	Comments	Checklist entries	Links	Activities	Projecttimes	Tasks	Documents	Logs
+ set extern time null change extern Time ✓ set checked Filter									
Projecttimes: 3									
☐	Date	Employee	booked	billable	Abrechenbar	Billing status	Projectticket	Away	Description
☐	Nov 12, 2024, 2:19 PM	Herr Tim Admin	1:15	2:00	2:00	checked	Preisliste	No	zweite Version Preisliste
☐	Nov 6, 2024, 2:18 PM	Herr Tim Admin	0:45	0:45	0:45	checked	Preisliste	No	Interne Abstimmung
☐	Nov 3, 2023, 1:36 PM	Herr Tim Admin	0:45	0:00	0:00	unchecked	Preisliste	No	erster Entwurf Preisliste

Time recording



Edit or delete time entries

- Time entries can be edited or deleted depending on how the user is authorized.
- The authorization must be defined for the role in the project type. If the role is authorized for “Control time”, all “Controlling-specific” actions are also active.



Project Controlling

Project

Project Controlling

As booked times are rarely billed 1:1, the corresponding times can be controlled and adjusted for each projectticket. For this purpose, all tickets with unchecked times are listed in the "Controlling" tab.

To be able to use the "Controlling" functions, the role must be authorized for "Control time".

As soon as a projectticket is selected, the information from the projectticket is listed in the „Projectticket Comments" and "Booked times of projectticket" tables.

This allows you to react to comments and check the times if necessary.

Once all times on a ticket have been checked, it is no longer displayed in this overview.

The screenshot displays the 'Controlling' tab in a software interface. At the top, there's a navigation bar with tabs: Projecttickets, Description, Activities, Projectmembers, Controlling (selected), Tasks, and Projecttimes. Below this, a table titled 'Projectticket with unchecked times' lists project tickets. The first entry is 'Preliste' with a status of 'in Bearbeitung' and a priority of 'kritisch'. A callout bubble points to this entry with the text: 'Once all times on a ticket have been checked, it is no longer displayed in this overview.'

Below the table, there's a section for 'Projectticket Comments'. It shows a comment from 'Herr Tim Admin' dated 'Jun 25, 2024, 7:54 AM'. A context menu is open over this comment, showing options: 'set settled', 'remove settled', 'change away', 'move Ticket Time', 'reset extern time', 'new extern time', 'set unchecked', 'Leistungsnachweis (Liste)', and 'Export'.

At the bottom, there's a table titled 'Booked Times of the projectticket'. It lists booked times for the 'Preliste' ticket. The first entry is from 'Nov 3, 2023, 1:36 PM' by 'Herr Tim Admin' with a booked time of 0:45 and a billable time of 0:45. The 'Billing status' is 'unchecked' and the 'Away' status is 'No'.

On the right side, there's a sidebar with a 'Time booking' section showing 'Herr Tim Admin' and 'Nov 3, 2023, 1:36 PM'. Below this, there's a 'Ticketinformation' section showing the project 'Einführung Kaffeeblatt-Tee' and the project ticket 'Preliste'. Further down, there's a 'Workingtime details' section showing 'booked' and 'billable' times as 0:45, and 'Billing status' as 'unchecked'. At the bottom of the sidebar, there's a 'Description' section showing 'erster Entwurf Preliste'.

Project Controlling – Process

The following process is carried out to bill a time booking:

1. Check the billable time and adjust it if necessary or set it to zero.
2. Set the billing status from “Unchecked” to “Checked”.
3. As soon as the invoice has been created, the billing status is set to “Billed”.

Undoing a process or individual steps in it

If the billable value of a time booking needs to be checked/adjusted again, for example, after it has already been set to checked, the “Checked” status must be reset to “Unchecked” so that the billable value can then be adjusted.

It is always possible to undo all or individual steps in this process.

Project

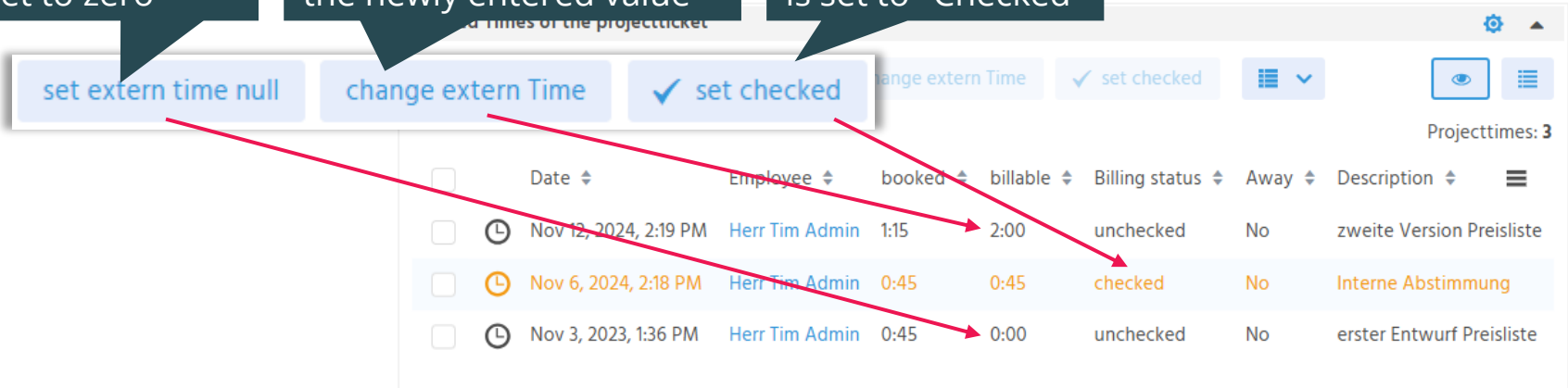
Project Controlling – Actions

The actions to map the controlling process:

The billable value is set to zero

The billable value is set to the newly entered value

The billing status is set to "Checked"



The screenshot displays the ADITO Project Controlling interface. At the top, there are three action buttons: "set extern time null", "change extern Time", and "✓ set checked". Below these buttons is a table with columns: Date, Employee, booked, billable, Billing status, Away, and Description. The table contains three rows of data. Red arrows point from the action buttons to the corresponding columns in the table: "set extern time null" points to the "billable" column, "change extern Time" points to the "billable" column, and "✓ set checked" points to the "Billing status" column.

	Date	Employee	booked	billable	Billing status	Away	Description
☐	Nov 12, 2024, 2:19 PM	Herr Tim Admin	1:15	2:00	unchecked	No	zweite Version Preisliste
☐	Nov 6, 2024, 2:18 PM	Herr Tim Admin	0:45	0:45	checked	No	Interne Abstimmung
☐	Nov 3, 2023, 1:36 PM	Herr Tim Admin	0:45	0:00	unchecked	No	erster Entwurf Preisliste

Project Controlling – Serial actions

 set settled

The billing status is set to „invoiced" (the entry is displayed in green).

 remove settled

The billing status is reset to "checked" (the entry is displayed in orange).

change away

The "Away" indicator is changed for this time booking.

move Ticket Time

The booked times are moved to another projectticket (only possible if not yet billed).

reset extern time

The edited value is reset to the original value.

new extern time

Creates a pseudo time booking with 0 booked hours. However, the billable hours can be changed and therefore billed.

set unchecked

The billing status is reset to "unchecked" (the entry is displayed in black).

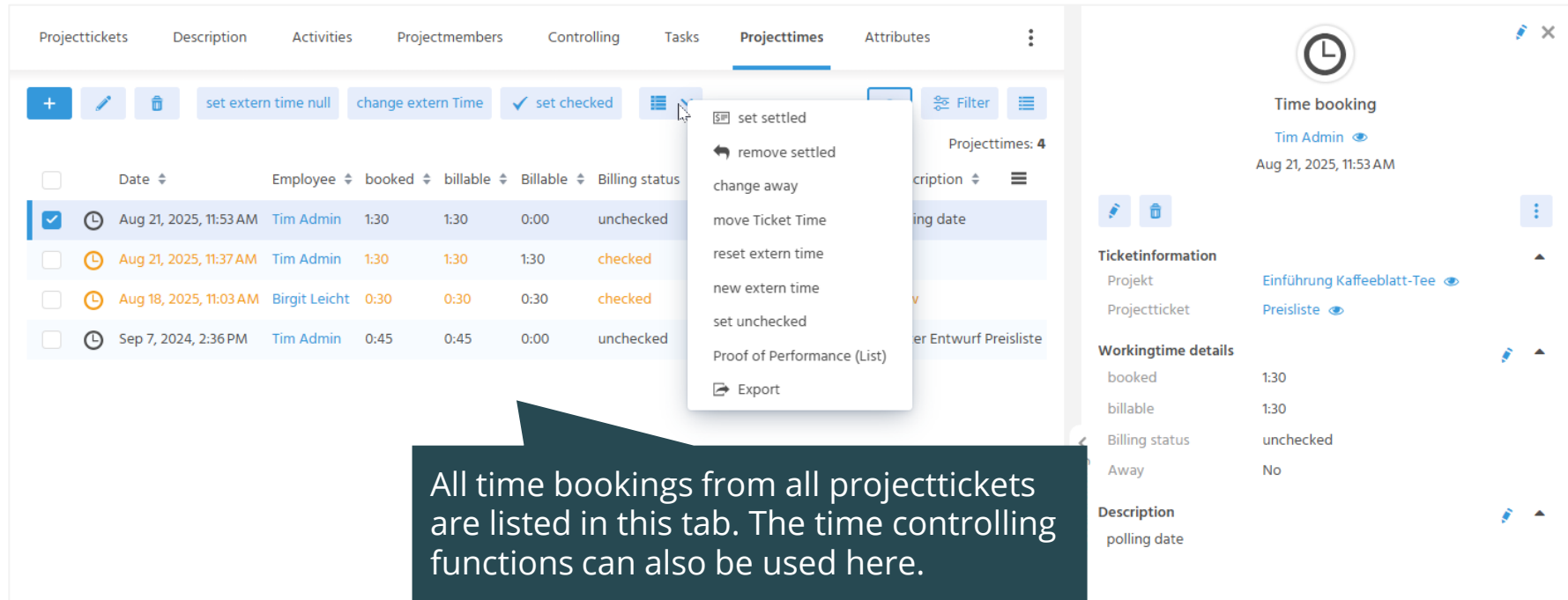
Proof of Performance (List)

Export of a performance record for verified times.

 Export

Project

Overview of all time bookings



Projecttickets Description Activities Projectmembers Controlling Tasks **Projecttimes** Attributes

set extern time null change extern Time ✓ set checked

	Date	Employee	booked	billable	Billable	Billing status
✓	Aug 21, 2025, 11:53 AM	Tim Admin	1:30	1:30	0:00	unchecked
	Aug 21, 2025, 11:37 AM	Tim Admin	1:30	1:30	1:30	checked
	Aug 18, 2025, 11:03 AM	Birgit Leicht	0:30	0:30	0:30	checked
	Sep 7, 2024, 2:36 PM	Tim Admin	0:45	0:45	0:00	unchecked

Projecttimes: 4

Filter

set settled
remove settled
change away
move Ticket Time
reset extern time
new extern time
set unchecked
Proof of Performance (List)
Export

Time booking
Tim Admin
Aug 21, 2025, 11:53 AM

Ticketinformation
Projekt Einführung Kaffeeblatt-Tee
Projectticket Preisliste

Workingtime details
booked 1:30
billable 1:30
Billing status unchecked
Away No

Description
polling date

All time bookings from all projecttickets are listed in this tab. The time controlling functions can also be used here.

Project

Project Controlling – Proof of Performance (List)

The screenshot shows the 'Projecttimes' interface. At the top, there are tabs for 'Controlling', 'Tasks', 'Projecttimes', and 'Attributes'. The 'Projecttimes' tab is active. Below the tabs, there is a 'Date' field set to '8/21/2025'. A context menu is open over the 'Projecttimes' list, showing options: 'set checked', 'set settled', 'remove settled', 'change away', 'move Ticket Time', 'reset extern time', 'new extern time', 'set unchecked', 'Proof of Performance (List)', and 'Export'. The 'Proof of Performance (List)' option is highlighted. Below the menu, there is a 'Save' button and an 'Abort' button.

The date indicates the end date up to which the audited times are to be included in the performance record.

List of all tickets with the total of the verified times up to the selected date that are to be billed again. This performance record can then be presented to the customer.

The screenshot shows a 'Proof of Performance' document for Aquire GmbH. The document is titled 'Proof of Performance' and includes the following information:

Customer: Aquire GmbH
Projectname: Einführung Kaffeeblatt-Tee
to be billed again: 0.53 Days
consumed so far: 0.00 Days (null%)
total commissioned: 0.00 Days

Tickets in 2025 / 08

Ticketnummer	Status	Title	to be billed again
2000018	in progress	Anwendungsbilder	1.00 hrs.
2000010	in progress	Preisliste	2.50 hrs.
2000024	in progress	Verpackung	0.75 hrs.

meineFirma GmbH Proof of Performance for Aquire GmbH from 28.08.2025 Page 1 from 1

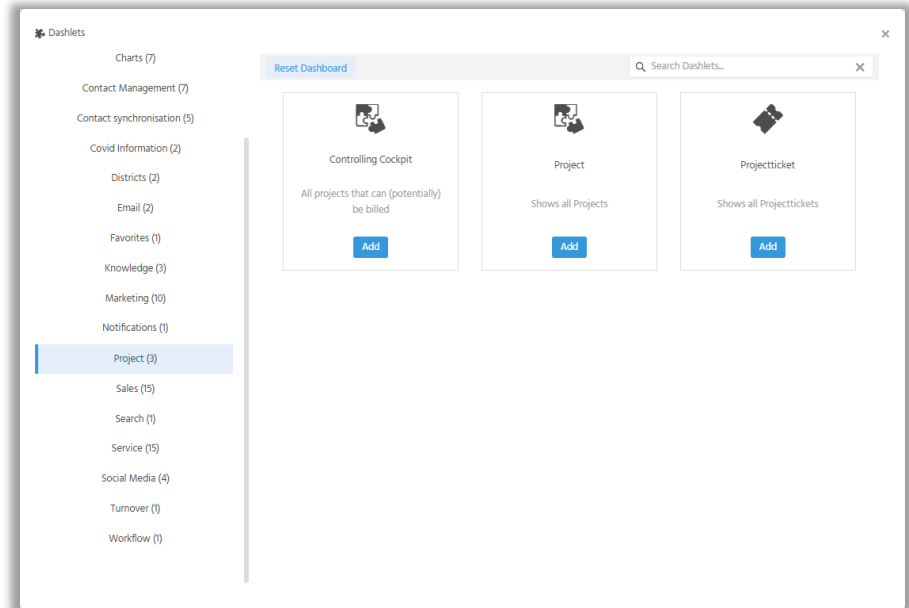
Overview using dashlets

Project and Projectticket

Overview using dashlets

- Create individual dashlets from the respective FilterView (project or projectticket) to "keep an eye on everything".
- Or use the dashlets from the DashletStore.

Dashlets from the DashletStore



Project and Projectticket

Individual dashlets: examples

- *Tickets that you need to edit*
Filter all tickets in which you are entered as an editor

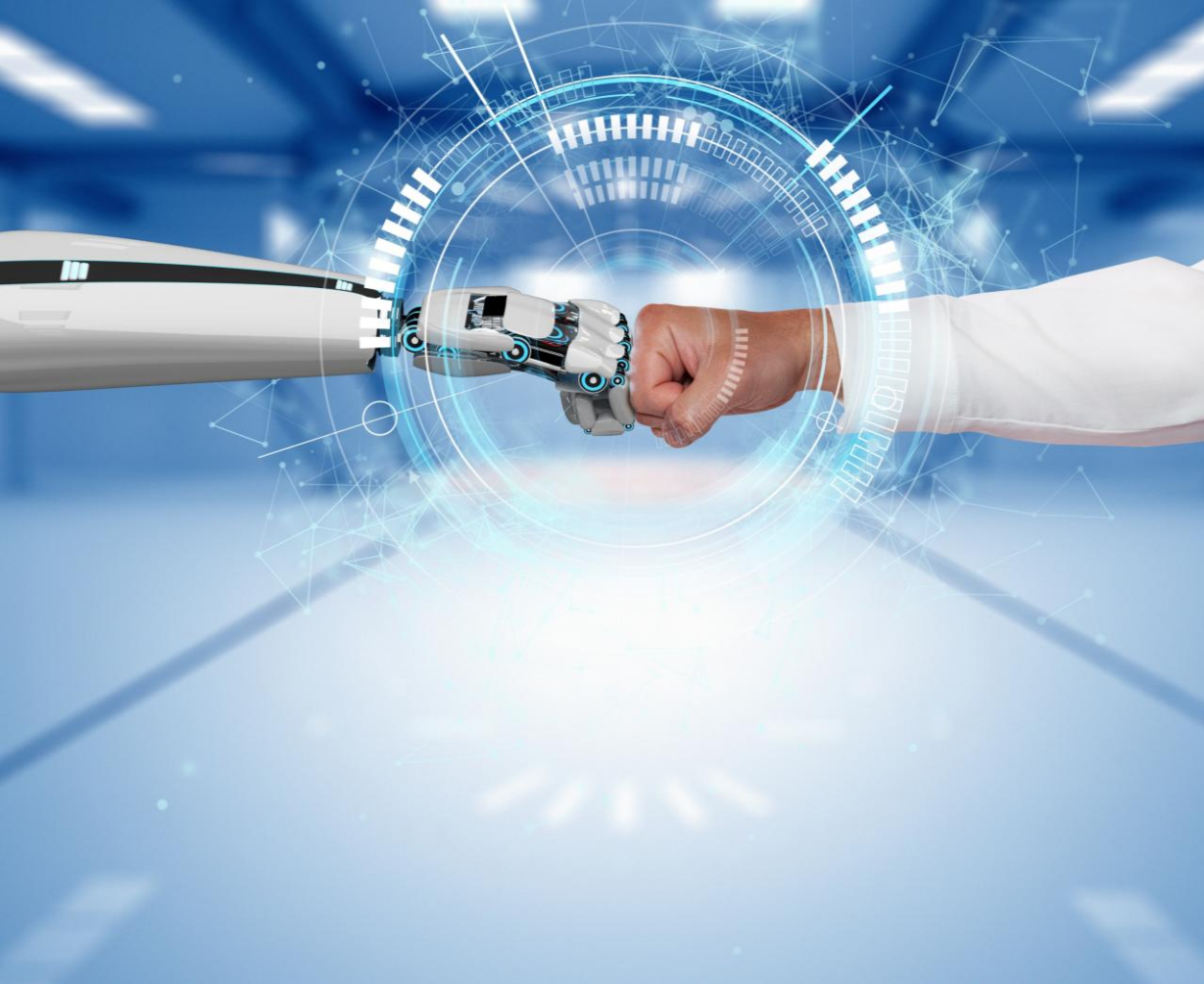
My Projekttickets

☐	Priority	Ticket-Nr.	Tickettype	Title	Status	Progress	Projectname	Requester	Editor	minutes worked	
☐	IA	mittel	2000028	IT Ausstattung	Ausstattung IT	erfasst	0%	Onboarding Martin Müller	Herr Tim Admin	Herr Tim Admin	
☐	AU	mittel	2000021	Aufgabe	Texting	erfasst	0%	Einführung Kaffeeblatt-Tee	Herr Tim Admin	Herr Tim Admin	
☐	AU	hoch	2000016	Aufgabe	Aufnahme in PIM	erfasst	0%	Einführung Kaffeeblatt-Tee	Herr Tim Admin	Herr Tim Admin	
☐	AU	kritisch	2000010	Aufgabe	Preisliste	in Bearbeitung	25%	Einführung Kaffeeblatt-Tee	Herr Tim Admin	Herr Tim Admin	2.75 Std.
☐	AU	kritisch	2000000	Aufgabe	Durchführung Kick-off	in Bearbeitung	0%	Einführung Kaffeeblatt-Tee	Herr Tim Admin	Herr Tim Admin	

The dashlet provides an up-to-date, direct overview of your own tickets.

No ToDo can be overlooked.

- *Tickets for which you must provide feedback as the requester*
Filter all tickets in which you are entered as the requester and the status "Requester checks"
- *Tickets from a project grouped according to a ticket attribute*
- ...

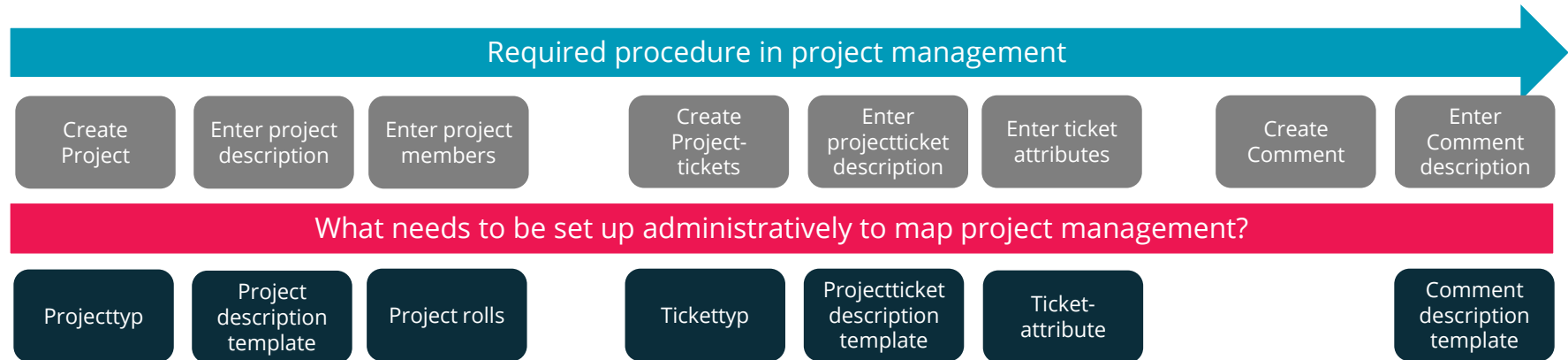


Project administration

Project administration

What and how is configured in the system? – Overview

In this part of the presentation you will find information on what and how to handle the administrative tasks.

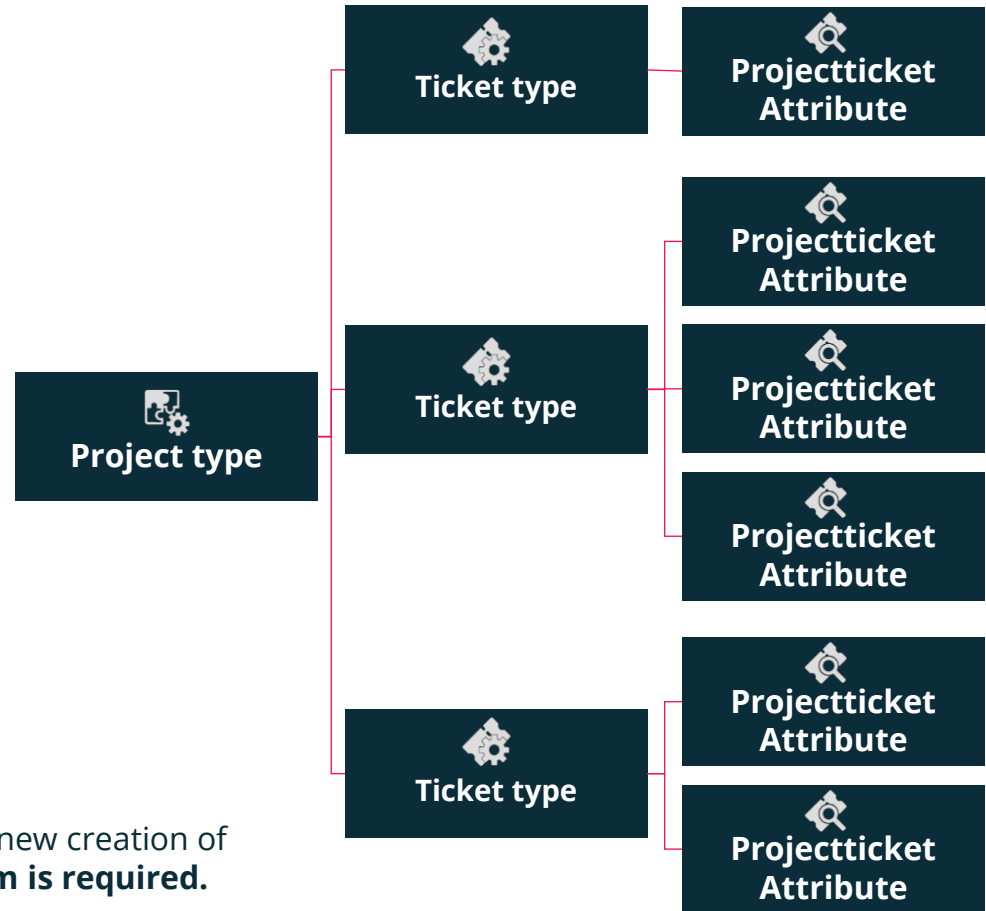


Project administration

- Define your own project types to map your requirements in terms of project support and implementation.
- The project type forms the backbone to which you assign various ticket types.
- Define projectticket attributes for the respective ticket types to map specific information that you need for structured work (filtering & grouping).
- In addition, templates can be defined which, depending on the project type, ticket type or comment, are made available to the user for selection and thus support/guide them in the best possible way when collecting information.



To be able to use the new project type for new creation of projects, **a new registration in the system is required.**

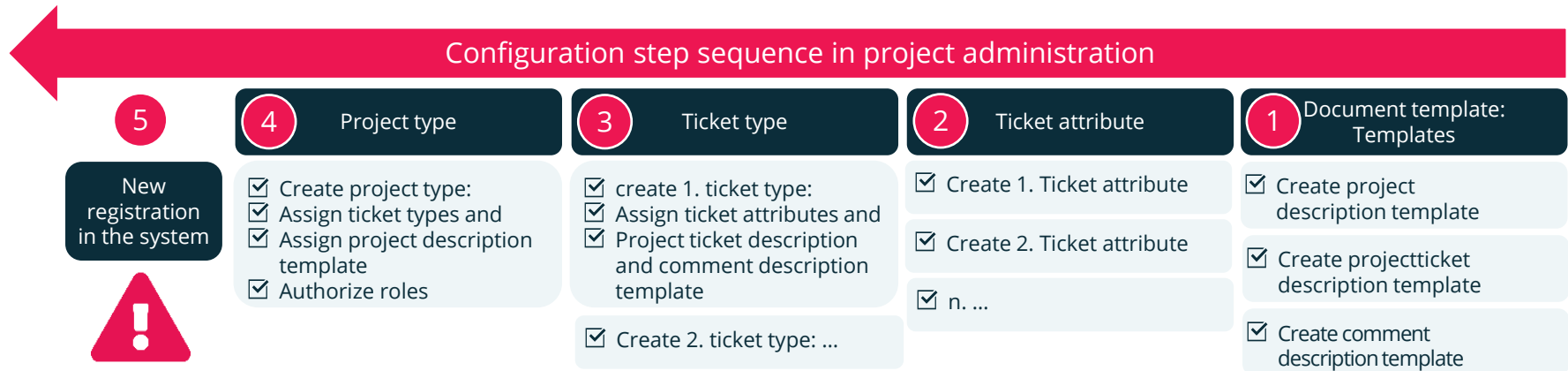


Project administration

What and how is configured in the system? – How to proceed (1/3)

To implement your requirements for project support (which project type, which projecttickets, which ticket attributes) in ADITO, we recommend the following procedure:

- You have completely designed the requirements and can now enter everything directly in ADITO (see sequence in the graphic).
- Subsequent changes/additions can be made/added.



Project administration

How to proceed (2/3)

The important thing with the recommended procedure is that you have designed everything in advance and “only” have to make minor adjustments afterwards.

1. Now create the required templates in the **first step**.
2. In the **second step**, you create the required ticket attributes.
3. In the **third step**, you can enter the required ticket attributes and templates directly when creating a new ticket type.
4. In the **fourth step**, you create the project type. Here, too, you can enter the ticket types and, if necessary, the template for the project description. This means that all settings (templates etc.) defined for the ticket types are automatically transferred to the project type.



For example, if you have already defined the contribution template and ticket attributes for a ticket type, you can select these when creating a new ticket type. The comment template and ticket attributes are also transferred to the project type in which the ticket type is configured.

Subsequent adjustments/additions – If something has been added, you must ensure that you update it in the relevant places.



*For example, if a ticket type has already been created and assigned to a project type and a comment template is subsequently created for it, this must be subsequently added to the ticket type and the project type.
The same applies to ticket attributes.*

Project administration

How to proceed (3/3)



5. in order to create a new project based on a newly created project type and to be able to create project tickets in it,
 - a **role must be defined in advance** in the project type that is authorized to create project tickets (which is assigned to a project member when the project is created).
 - And a **new logon to the system** must take place.

Project administration



Example: Agile project implementation

You need a project type to implement a software project in an agile way.

You want to record the requirements in epics, which in turn can consist of several user stories. In order to implement the individual epics/user stories, the detailed requirements should be mapped in tasks. You also want to record bugs in this project.

In order to be able to work in sprints in this project and assign the tickets to specific topics, it should be possible to record this information on the tickets.

"Step by step":

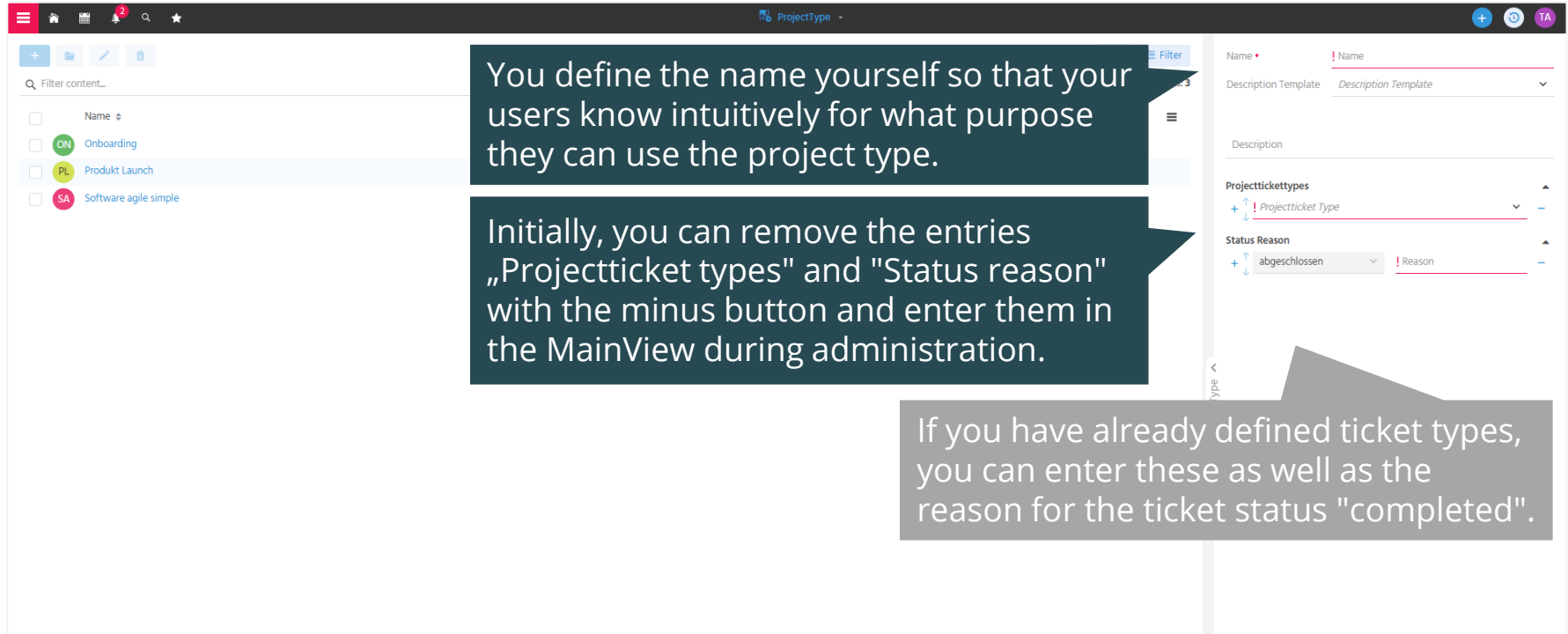
- Create project type
- Create projectticket types: Epic, User Story, Task, Bug
- Create projectticket attributes:
 - Topic
 - Sprint
 - ...
- Store projectticket types with associated ticket attributes in the project type
- Create project roles with authorization in the project type
- Integrate templates for the project description, ticket description, comment description



Define project type

Project type

New creation



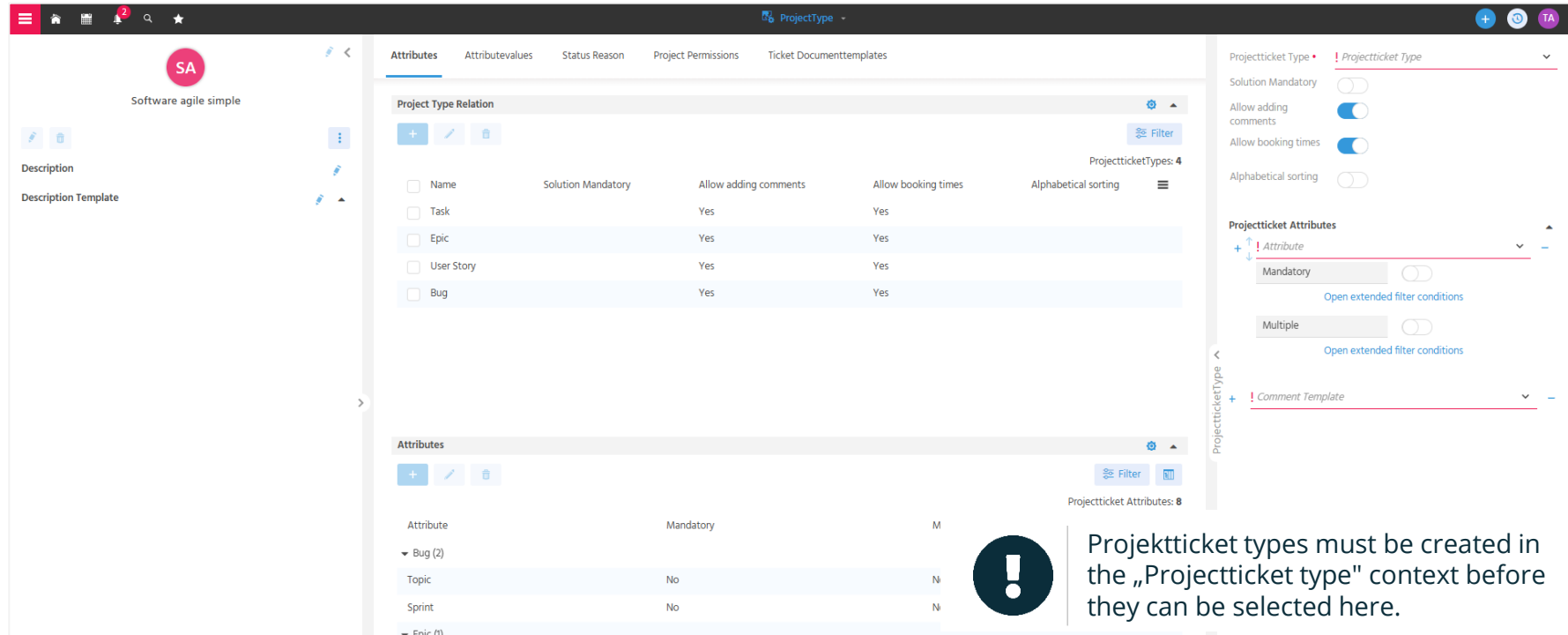
You define the name yourself so that your users know intuitively for what purpose they can use the project type.

Initially, you can remove the entries „Projectticket types" and "Status reason" with the minus button and enter them in the MainView during administration.

If you have already defined ticket types, you can enter these as well as the reason for the ticket status "completed".

Project type

Store ticket types in the project type



The screenshot displays the ADITO Project Type configuration interface. The sidebar on the left shows a project type named "Software agile simple" with a description template. The main area is divided into tabs: Attributes, Attributevalues, Status Reason, Project Permissions, and Ticket Documenttemplates. The "Attributes" tab is active, showing a table of ticket types and their attributes. A callout box with an exclamation mark states: "Projektticket types must be created in the „Projectticket type“ context before they can be selected here."

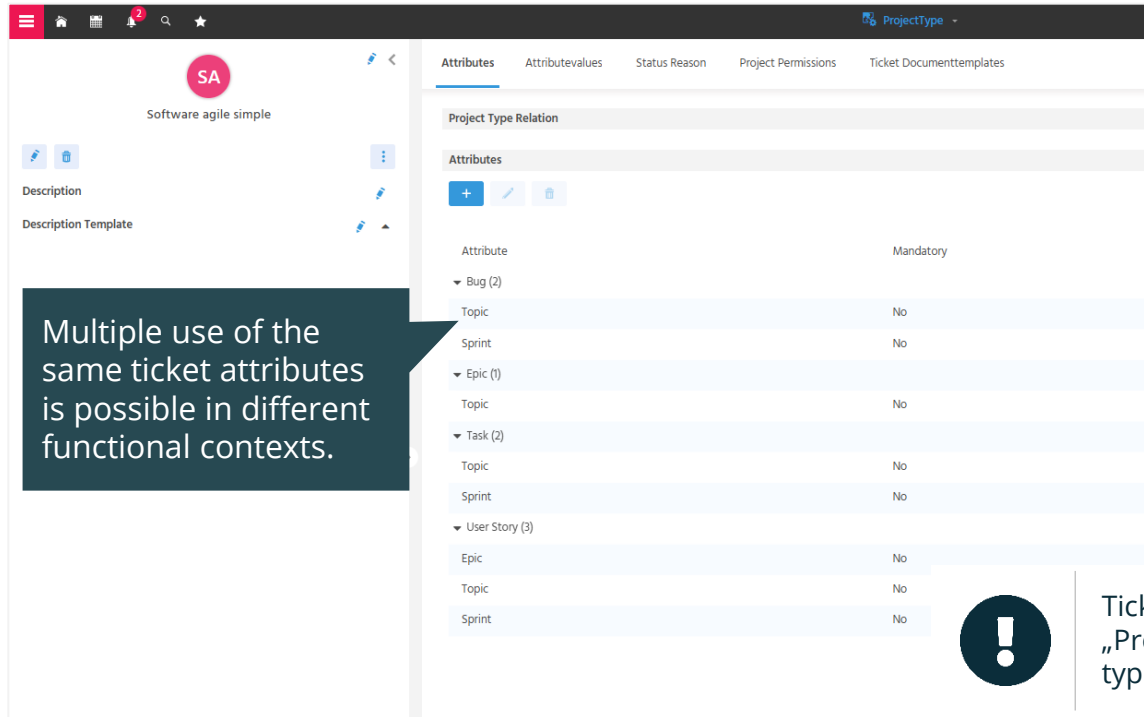
Project Type Relation	Solution Mandatory	Allow adding comments	Allow booking times	Alphabetical sorting
☐ Name				
☐ Task		Yes	Yes	
☐ Epic		Yes	Yes	
☐ User Story		Yes	Yes	
☐ Bug		Yes	Yes	

Attributes	Mandatory	M
Attribute		
▼ Bug (2)		
Topic	No	Ni
Sprint	No	Ni
▼ Epic (1)		

Project type

Customize ticket attributes in the project type

Multiple use of the same ticket attributes is possible in different functional contexts.



The screenshot shows the 'Project Type' configuration page in ADITO. The left sidebar contains a search bar with 'SA' and a list of project types: 'Software agile simple', 'Description', and 'Description Template'. The main content area is titled 'Project Type Relation' and 'Attributes'. It displays a table of attributes for the selected project type.

Attribute	Mandatory
▼ Bug (2)	
Topic	No
Sprint	No
▼ Epic (1)	
Topic	No
▼ Task (2)	
Topic	No
Sprint	No
▼ User Story (3)	
Epic	No
Topic	No
Sprint	No

The ticket attributes are automatically entered here as soon as the ticket type has been selected.

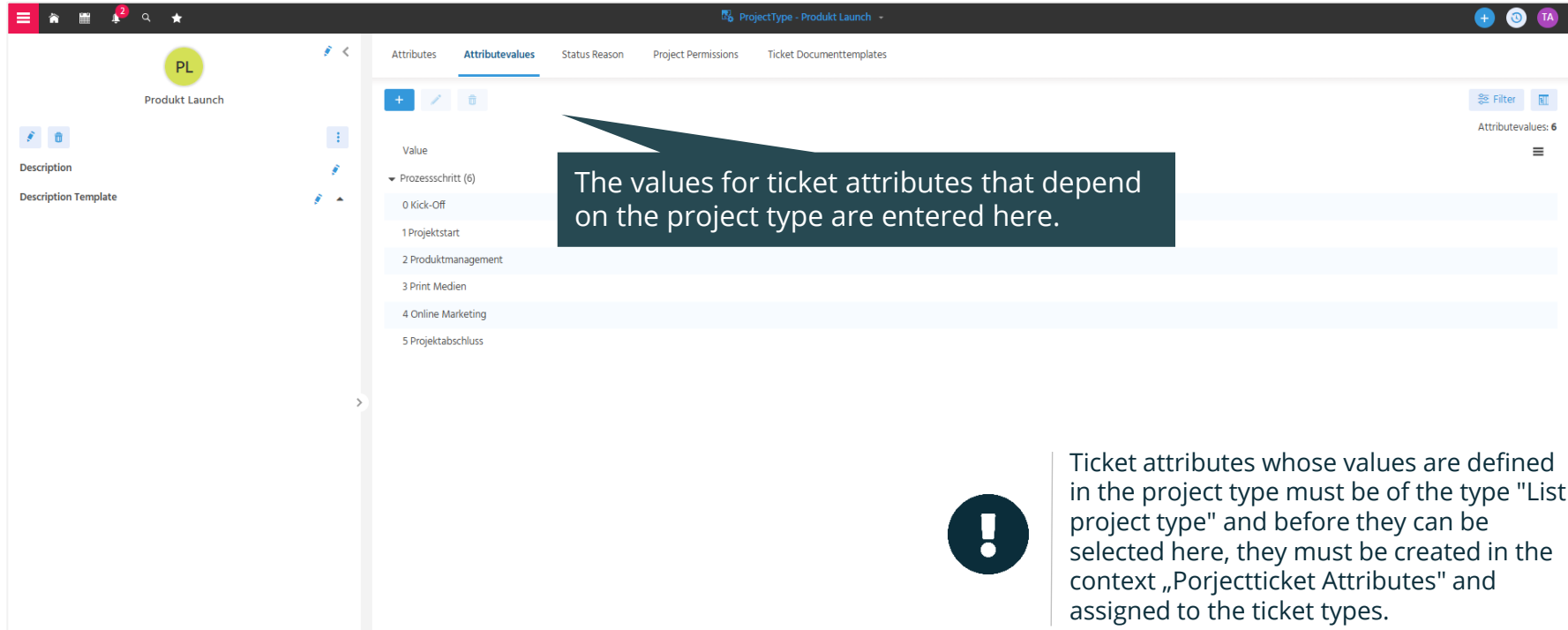
However, you have the option of customizing the ticket attributes of a ticket type for each project type.



Ticket attributes must be created in the context „Projectticket attributes" and assigned to the ticket types before they can be selected here.

Project type

Enter values for ticket attributes on a project type-specific basis



The screenshot shows the ADITO interface for 'Projekt Launch'. The 'Attributevalues' tab is active, displaying a list of values for the 'Prozessschritt (6)' attribute. A callout box points to this list with the text: 'The values for ticket attributes that depend on the project type are entered here.'

Value

- ▼ Prozessschritt (6)
- 0 Kick-Off
- 1 Projektstart
- 2 Produktmanagement
- 3 Print Medien
- 4 Online Marketing
- 5 Projektabschluss

Filter

Attributevalues: 6

!

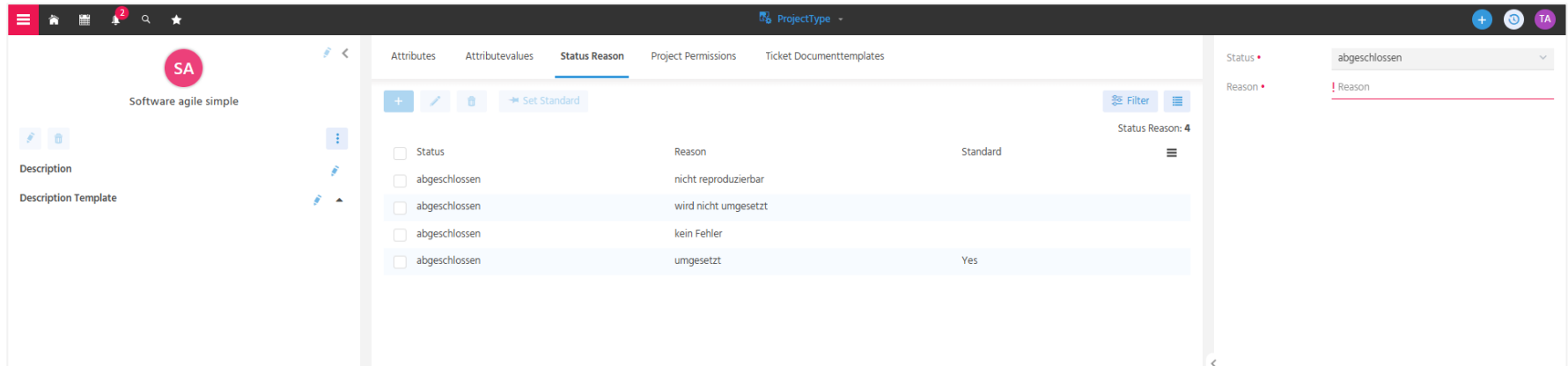
Ticket attributes whose values are defined in the project type must be of the type "List project type" and before they can be selected here, they must be created in the context „Projectticket Attributes" and assigned to the ticket types.

Project type

Reason for the ticket status "completed"

When a ticket is closed, there can be various reasons. For example, it has been implemented; it has been decided that it will not be implemented; the described behavior is not reproducible, etc.

- Here you enter the reasons for the ticket status "completed".
- If you mark a reason as "Standard", this reason is automatically entered in the ticket as soon as the "Completed" status is reached and can be adjusted.
- If you do not enter any values here, you can set the tickets in the project to the status "completed" without giving a reason.



The screenshot shows the ADITO ProjectType configuration interface. The left sidebar displays the project name "SA" and the description "Software agile simple". The main area is titled "ProjectType" and contains a table for "Status Reason". The table has columns for "Status", "Reason", and "Standard". The "Status" column lists "abgeschlossen" (completed) four times. The "Reason" column lists "nicht reproduzierbar", "wird nicht umgesetzt", "kein Fehler", and "umgesetzt". The "Standard" column has "Standard" for the first two rows and "Yes" for the last two rows. A "Set Standard" button is visible. The right sidebar shows the "Status" dropdown set to "abgeschlossen" and the "Reason" dropdown set to "Reason".

Status	Reason	Standard
☐ abgeschlossen	nicht reproduzierbar	Standard
☐ abgeschlossen	wird nicht umgesetzt	
☐ abgeschlossen	kein Fehler	
☐ abgeschlossen	umgesetzt	Yes

Project type

Project roles and authorization

Attributes

Attributevalues

Status Reason

Project Permissions

Ticket Documenttemplates

+

Project Permissions: 3

Role	Read project	Edit project	Delete project	Read ticket	Create ticket	Edit ticket	Delete projectticket	Read ticket comment	Create ticket comment	Edit comment	Delete ticket comment	Move ticket	Controle
Product Owner	●	●	●	●	●	●	●	●	●	●	●	●	✕
Not a Projectmember	●	✕	✕	●	●	✕	✕	●	●	●	✕	✕	✕
Projektcontrolling	●	●	●	●	●	●	●	●	●	●	●	●	●

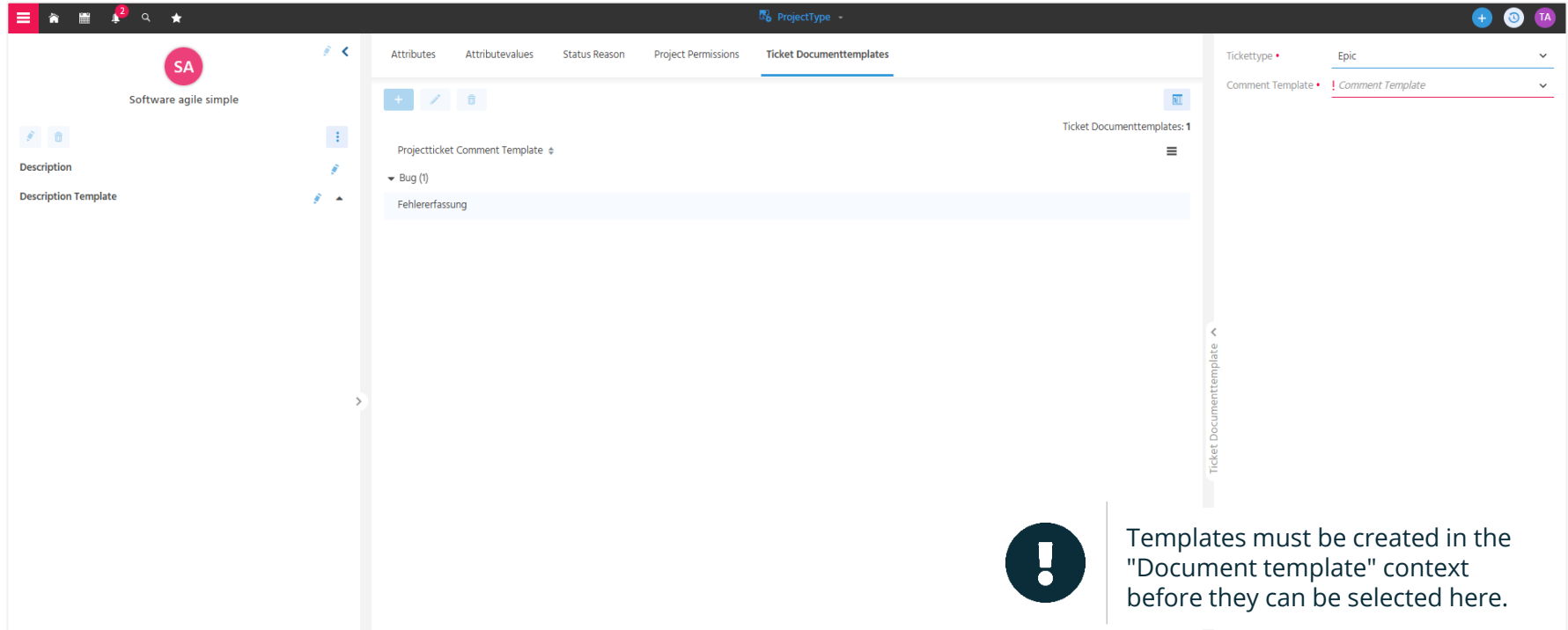
In the project type, the administrator defines the roles (keyword entries can also be adjusted) and their authorizations.



After adjustments/changes to authorizations, the user must log in to the system again with the role.

Project type

Define template selection for comments per ticket type



SA
Software agile simple

Description
Description Template

Attributes Attributevalues Status Reason Project Permissions Ticket Documenttemplates

Projectticket Comment Template

▼ Bug (1)
Fehlererfassung

Ticket Documenttemplates: 1

Tickettype • Epic

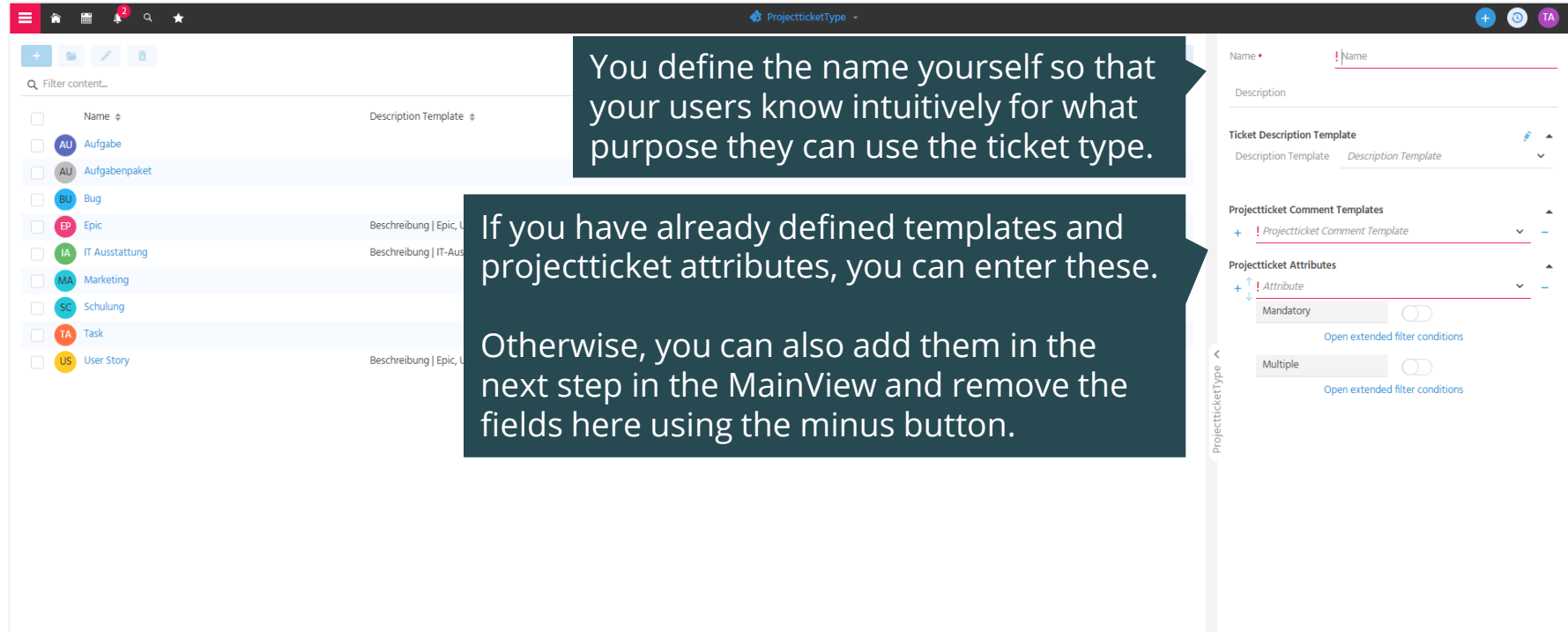
Comment Template • ! Comment Template

! Templates must be created in the "Document template" context before they can be selected here.

Define ticket type

Ticket type

New creation



You define the name yourself so that your users know intuitively for what purpose they can use the ticket type.

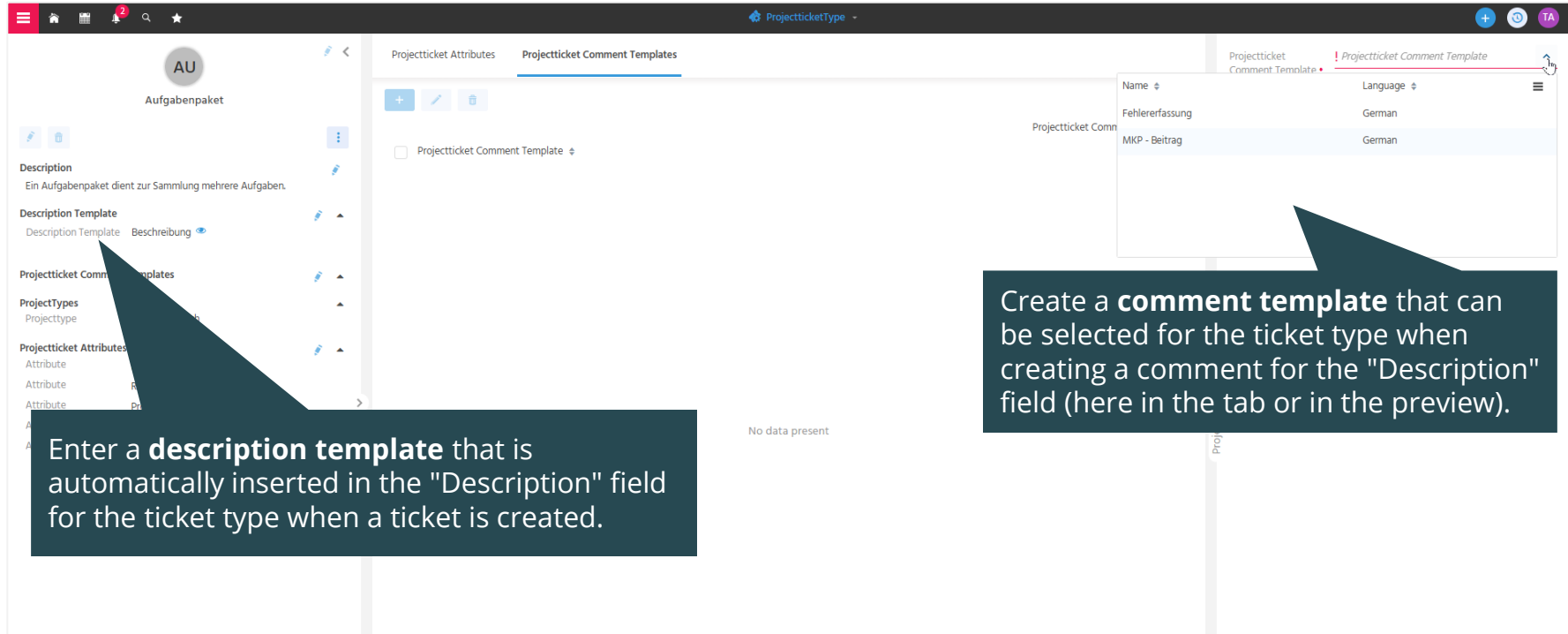
If you have already defined templates and projectticket attributes, you can enter these.

Otherwise, you can also add them in the next step in the MainView and remove the fields here using the minus button.

The screenshot shows the 'ProjectticketType' configuration page. On the left, a table lists existing ticket types with columns for 'Name' and 'Description Template'. The list includes 'Aufgabe', 'Aufgabenpaket', 'Bug', 'Epic', 'IT Ausstattung', 'Marketing', 'Schulung', 'Task', and 'User Story'. On the right, the configuration panel for a new ticket type is shown, with fields for 'Name', 'Description', 'Ticket Description Template', 'Projectticket Comment Templates', and 'Projectticket Attributes'. The 'Projectticket Attributes' section shows 'Mandatory' and 'Multiple' options, both currently disabled.

Ticket type

Ticket types – Create templates for descriptions



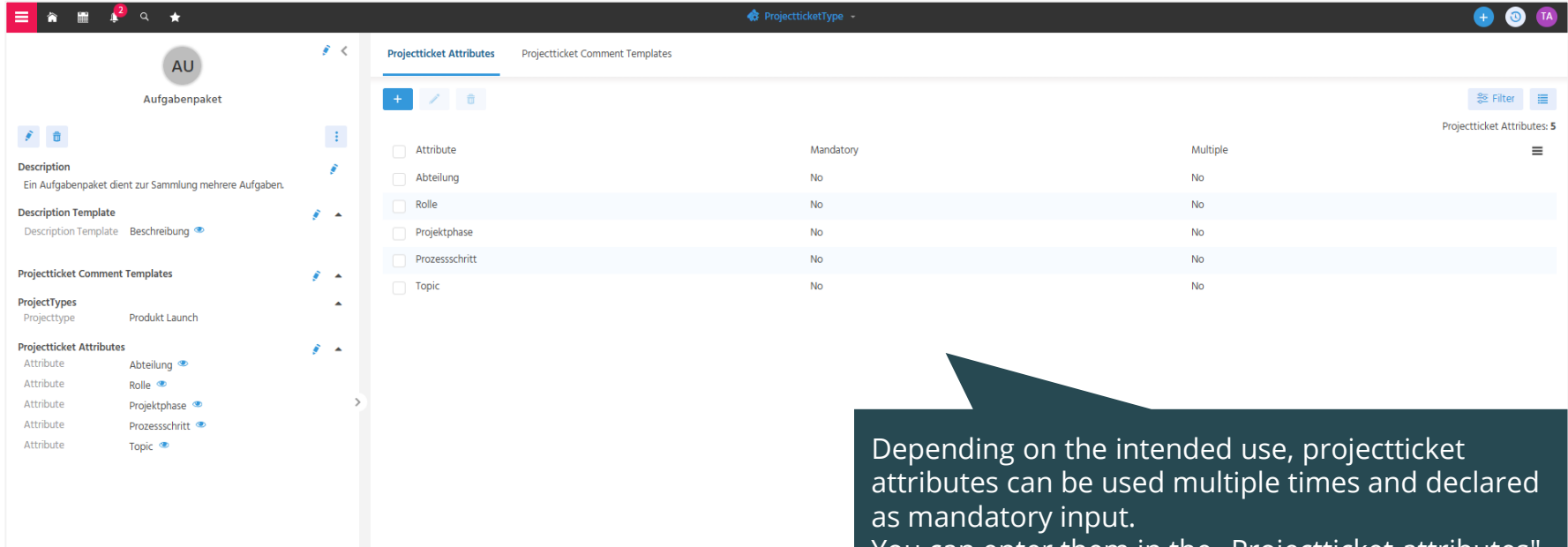
Enter a **description template** that is automatically inserted in the "Description" field for the ticket type when a ticket is created.

Name	Language
Fehlererfassung	German
MKP - Beitrag	German

Create a **comment template** that can be selected for the ticket type when creating a comment for the "Description" field (here in the tab or in the preview).

Ticket type

Ticket types – Enter projectticket attributes



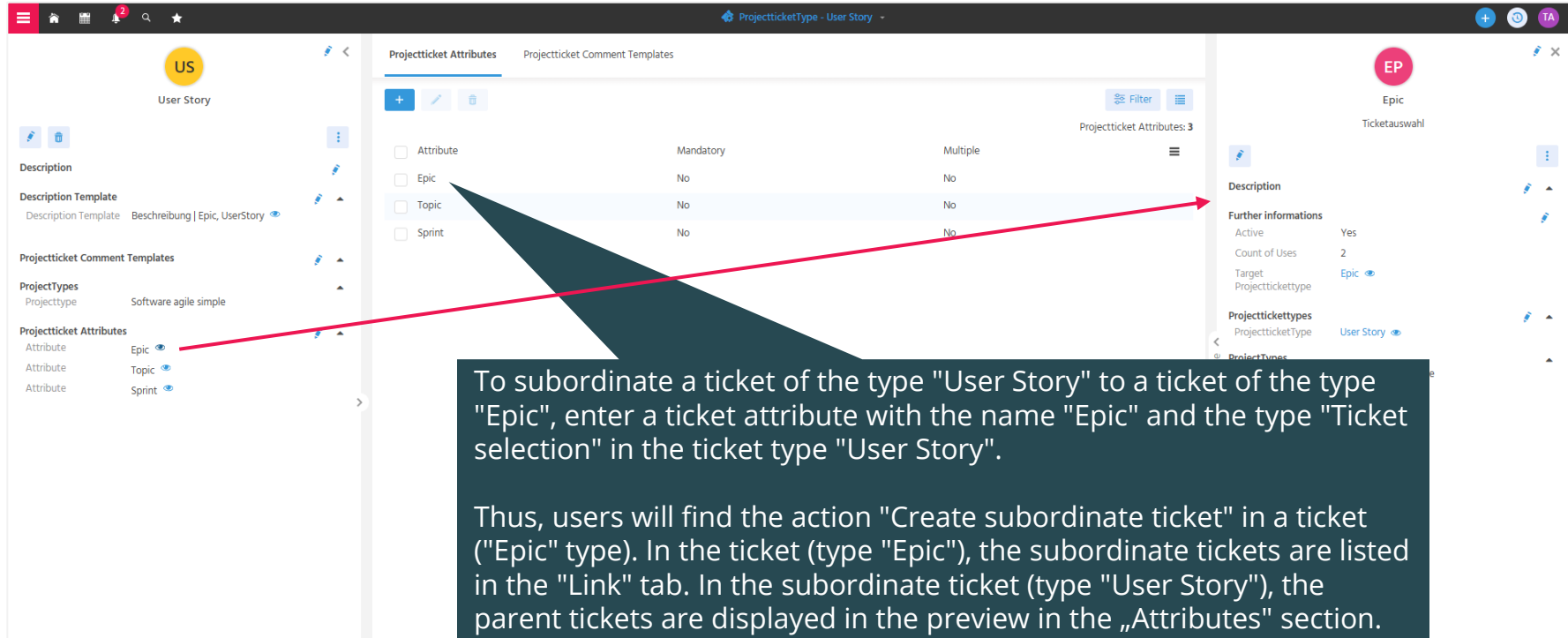
The screenshot displays the ADITO configuration interface for 'ProjectticketType'. The left sidebar shows a tree view with 'Aufgabenpaket' selected. The main area shows the 'Projectticket Attributes' tab with a table of attributes.

Attribute	Mandatory	Multiple
☐ Attribute	No	No
☐ Abteilung	No	No
☐ Rolle	No	No
☐ Projektphase	No	No
☐ Prozessschritt	No	No
☐ Topic	No	No

Depending on the intended use, projectticket attributes can be used multiple times and declared as mandatory input. You can enter them in the „Projectticket attributes" tab or in the preview in the "Ticket types" area.

Ticket type

Ticket types – Use ticket attributes to link tickets hierarchically



The screenshot displays the ADITO interface for configuring ticket types. On the left, the 'User Story' (US) ticket type is selected. The main area shows the 'Projectticket Attributes' table, which lists attributes and their properties. The 'Epic' attribute is highlighted. A red arrow points from the 'Epic' attribute in the table to the 'Epic' attribute in the 'Projectticket Attributes' section of the 'Epic' ticket type configuration on the right. A dark blue text box with white text is overlaid on the bottom right of the screenshot.

Attribute	Mandatory	Multiple
☐ Attribute	No	No
☐ Epic	No	No
☐ Topic	No	No
☐ Sprint	No	No

To subordinate a ticket of the type "User Story" to a ticket of the type "Epic", enter a ticket attribute with the name "Epic" and the type "Ticket selection" in the ticket type "User Story".

Thus, users will find the action "Create subordinate ticket" in a ticket ("Epic" type). In the ticket (type "Epic"), the subordinate tickets are listed in the "Link" tab. In the subordinate ticket (type "User Story"), the parent tickets are displayed in the preview in the „Attributes" section.

Ticket type

Ticket types – In which project types is it used?

As soon as a ticket type is assigned to a project type, you can view this here.

The assignment is made in the project type.

AU
Aufgabenpaket

Description
Ein Aufgabenpaket dient zur Sammlung mehrere Aufgaben.

Description Template
Description Template Beschreibung

Projectticket Comment Templates

ProjectTypes
Projecttype Produkt Launch

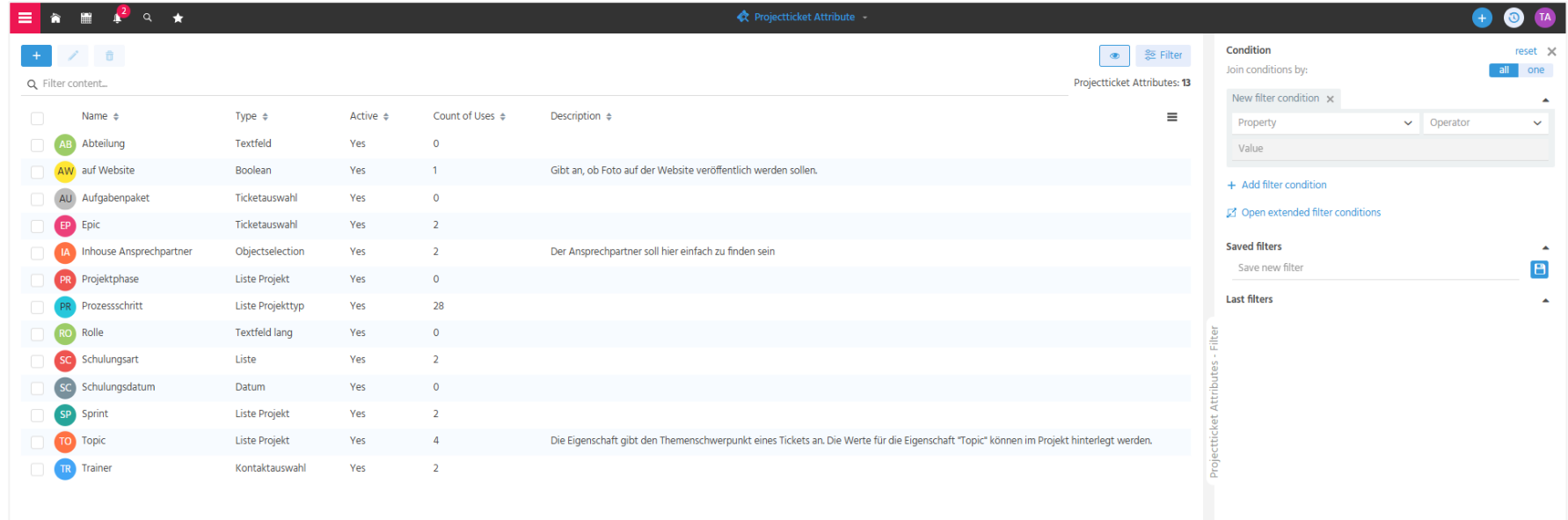
Projectticket Attributes

Attribute	Abteilung
Attribute	Rolle
Attribute	Projektphase
Attribute	Prozessschritt
Attribute	Topic

Projectticket Attribute

Overview in the FilterView

As projectticket attributes, you enter information that you want to record in the projectticket and by which you want to be able to filter and/or group.



The screenshot displays the 'Projectticket Attribute' FilterView interface. The main area shows a table of attributes with columns for Name, Type, Active status, Count of Uses, and Description. A sidebar on the right provides a 'Condition' panel for filtering, including options for 'Join conditions by' (all, one), 'New filter condition', and 'Add filter condition'. Below the table, there are links for 'Open extended filter conditions', 'Saved filters', and 'Last filters'.

Name	Type	Active	Count of Uses	Description
AB Abteilung	Textfeld	Yes	0	
AW auf Website	Boolean	Yes	1	Gibt an, ob Foto auf der Website veröffentlicht werden sollen.
AU Aufgabenpaket	Ticketauswahl	Yes	0	
EP Epic	Ticketauswahl	Yes	2	
IA Inhouse Ansprechpartner	Objectselection	Yes	2	Der Ansprechpartner soll hier einfach zu finden sein
PR Projektphase	Liste Projekt	Yes	0	
PR Prozessschritt	Liste Projekttyp	Yes	28	
RO Rolle	Textfeld lang	Yes	0	
SC Schulungsart	Liste	Yes	2	
SC Schulungsdatum	Datum	Yes	0	
SP Sprint	Liste Projekt	Yes	2	
TO Topic	Liste Projekt	Yes	4	Die Eigenschaft gibt den Themenschwerpunkt eines Tickets an. Die Werte für die Eigenschaft "Topic" können im Projekt hinterlegt werden.
TR Trainer	Kontaktauswahl	Yes	2	

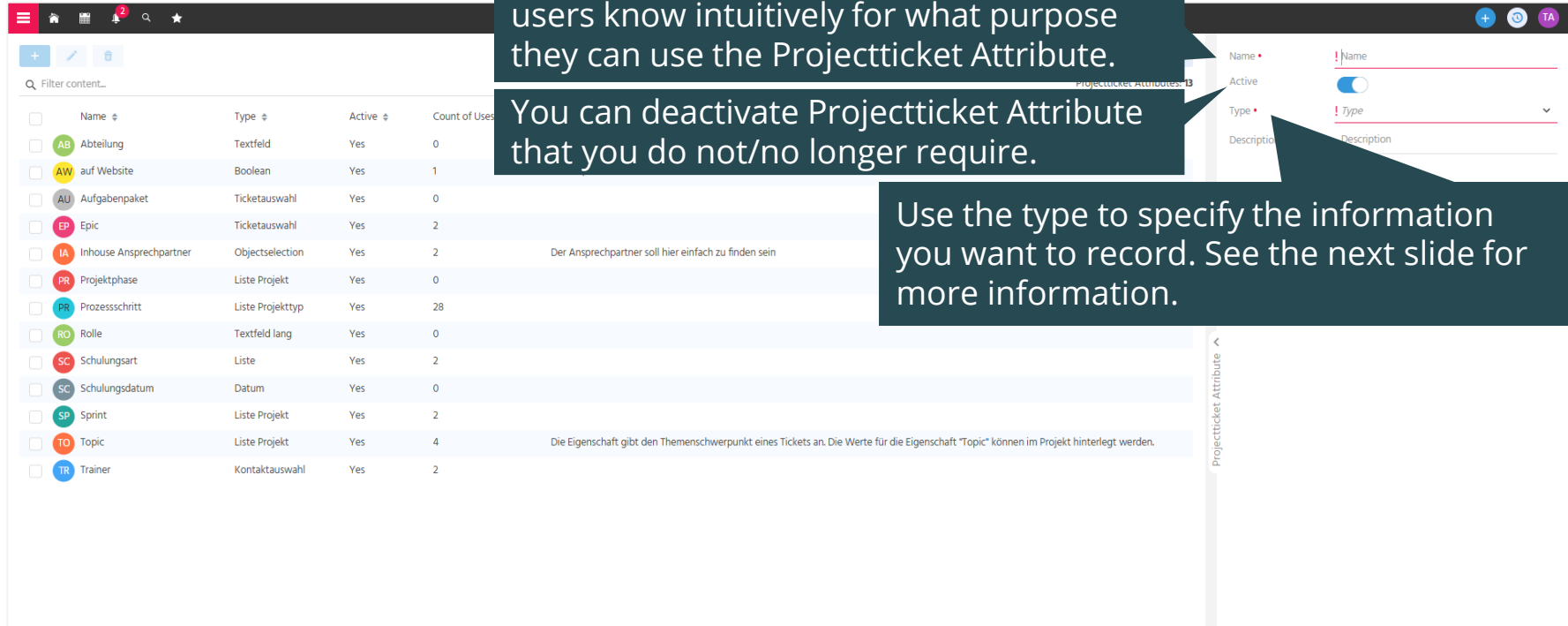
Projectticket Attribute

New creation

You define the name yourself so that your users know intuitively for what purpose they can use the Projectticket Attribute.

You can deactivate Projectticket Attribute that you do not/no longer require.

Use the type to specify the information you want to record. See the next slide for more information.



☐	Name	Type	Active	Count of Uses	
☐	AB Abteilung	Textfeld	Yes	0	
☐	AW auf Website	Boolean	Yes	1	
☐	AU Aufgabenpaket	Ticketauswahl	Yes	0	
☐	EP Epic	Ticketauswahl	Yes	2	
☐	IA Inhouse Ansprechpartner	Objectselection	Yes	2	Der Ansprechpartner soll hier einfach zu finden sein
☐	PR Projektphase	Liste Projekt	Yes	0	
☐	PR Prozessschritt	Liste Projekttyp	Yes	28	
☐	RO Rolle	Textfeld lang	Yes	0	
☐	SC Schulungsart	Liste	Yes	2	
☐	SC Schulungsdatum	Datum	Yes	0	
☐	SP Sprint	Liste Projekt	Yes	2	
☐	TO Topic	Liste Projekt	Yes	4	Die Eigenschaft gibt den Themenschwerpunkt eines Tickets an. Die Werte für die Eigenschaft "Topic" können im Projekt hinterlegt werden.
☐	TR Trainer	Kontaktauswahl	Yes	2	

Projectticket Attribute

Name

Active

Type

Description

Projectticket Attribute

Type	
Boolean	The value of the ticket attribute is entered by users using the toggle button.
Date	The value of the ticket attribute is entered by users using the date button.
Company selection	Value of the ticket attribute accesses the list of all companies.
Contact selection	Value of the ticket attribute accesses the list of all contacts.
List	Possible selection values are recorded when the ticket attribute is created.
Project list	Possible selection values are entered in the project ("attribute values" tab).
Project type list	Possible selection values are entered in the project type ("attribute values" tab).
List keyword	Selection values are recorded as keyword entries.
Self-learning list	Selection values can be entered by users.
Numeric field	The value of the ticket attribute is recorded by users as a numerical value.
Text field	Value of the ticket attribute is entered by users as text.
Text field long	The value of the ticket attribute is recorded by users as a longer text.
Ticket selection	Value of the ticket attribute accesses the list of all projecttickets and is used for linking subordinate tickets.

Projectticket Attribute

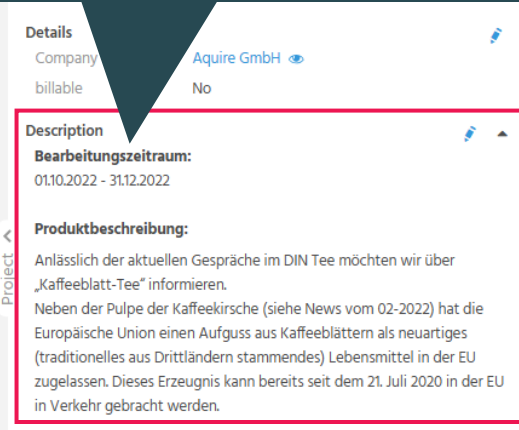
Type	
Object selection	The value of the ticket attribute accesses the list of the selected context (activity, company, contact, opportunity, projectticket, keyword entry) and a condition can be entered using a filter, e.g. to have only interested parties in the selection.
URL	A URL can be entered as a value. The  icon is also displayed in the ticket attributes overview
e-mail	An e-mail address can be entered as a value. The  icon is also displayed in the ticket attributes overview
Telephone	A telephone number can be entered as a value. The  icon is displayed in the ticket attributes overview

Create templates in document templates

Templates for

Project description

The template for the description of the project can be stored in the project type and is automatically inserted as soon as the project type is selected. The content of the description can be added individually.



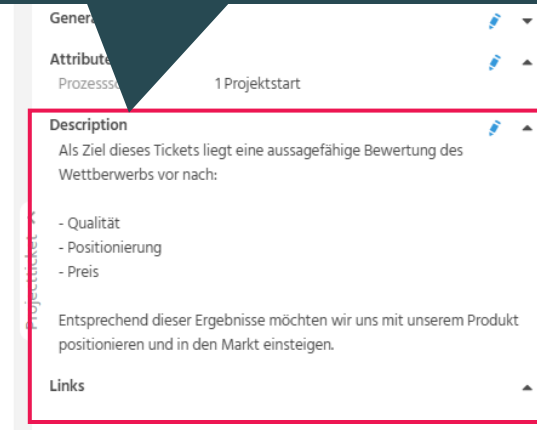
The screenshot shows a 'Details' form for a project. The 'Description' field is highlighted with a red border. It contains the following text:

Bearbeitungszeitraum:
01.10.2022 - 31.12.2022

Produktbeschreibung:
Anlässlich der aktuellen Gespräche im DIN Tee möchten wir über „Kaffeeblatt-Tee“ informieren.
Neben der Pulpe der Kaffeekirsche (siehe News vom 02-2022) hat die Europäische Union einen Aufguss aus Kaffeeblättern als neuartiges (traditionelles aus Drittländern stammendes) Lebensmittel in der EU zugelassen. Dieses Erzeugnis kann bereits seit dem 21. Juli 2020 in der EU in Verkehr gebracht werden.

Projectticket description

The template for the description of the projectticket can be stored in the ticket type and is automatically inserted as soon as the ticket type is selected. The content of the description can be added individually.



The screenshot shows a 'General' form for a projectticket. The 'Description' field is highlighted with a red border. It contains the following text:

Als Ziel dieses Tickets liegt eine aussagefähige Bewertung des Wettbewerbs vor nach:

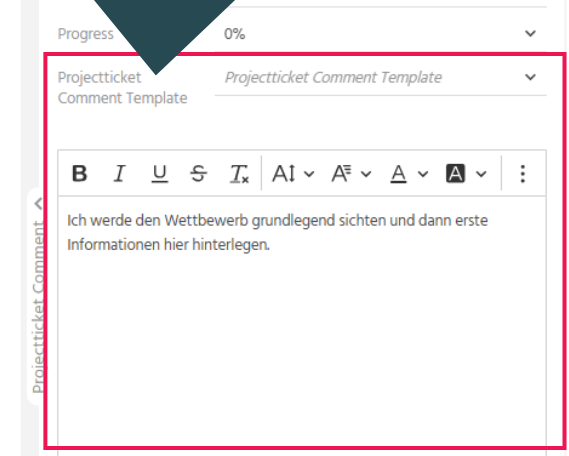
- Qualität
- Positionierung
- Preis

Entsprechend dieser Ergebnisse möchten wir uns mit unserem Produkt positionieren und in den Markt einsteigen.

Links

Description comment

The template for the comment can be stored for the ticket type and specifically for a project type. Users select the template. The content of the description can be added individually.



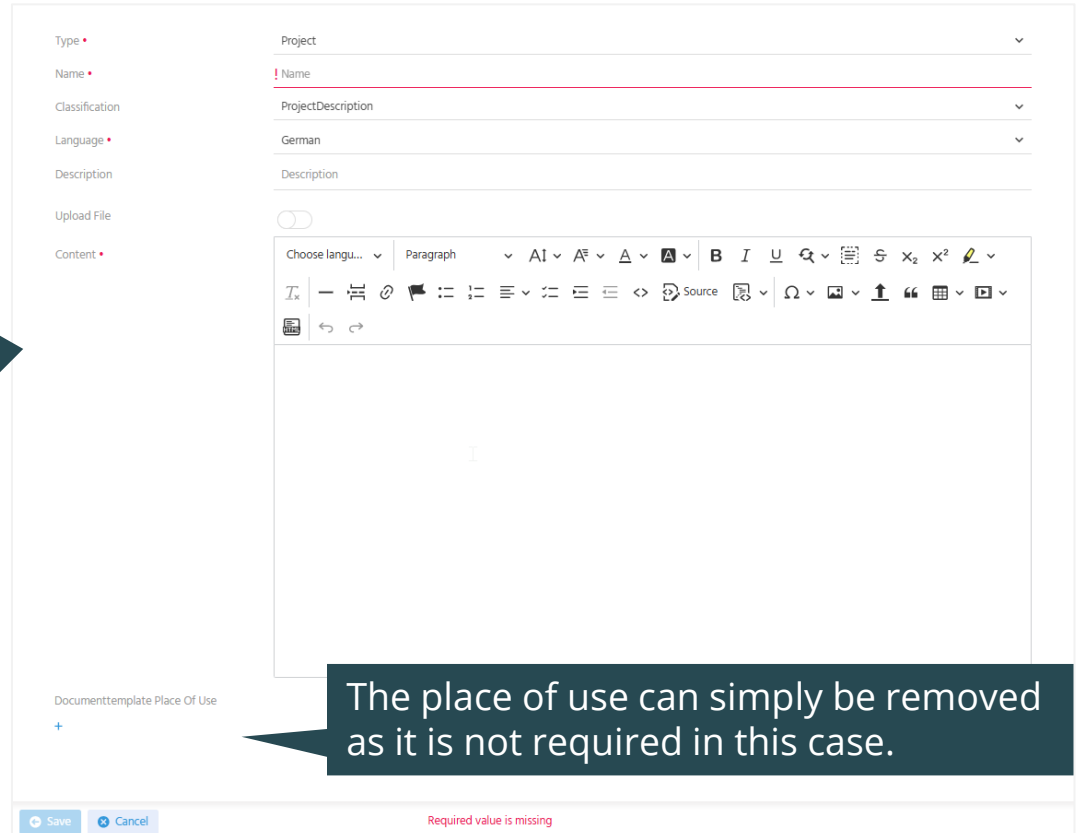
The screenshot shows a 'Projectticket Comment' form. The 'Comment Template' field is highlighted with a red border. It contains the following text:

Ich werde den Wettbewerb grundlegend sichten und dann erste Informationen hier hinterlegen.

Document template

Template Description Project

Document templates of the type "Project" with the classification "Project description" can be stored in the definition of the project type. This means that the template is displayed in the description of every project of this project type.



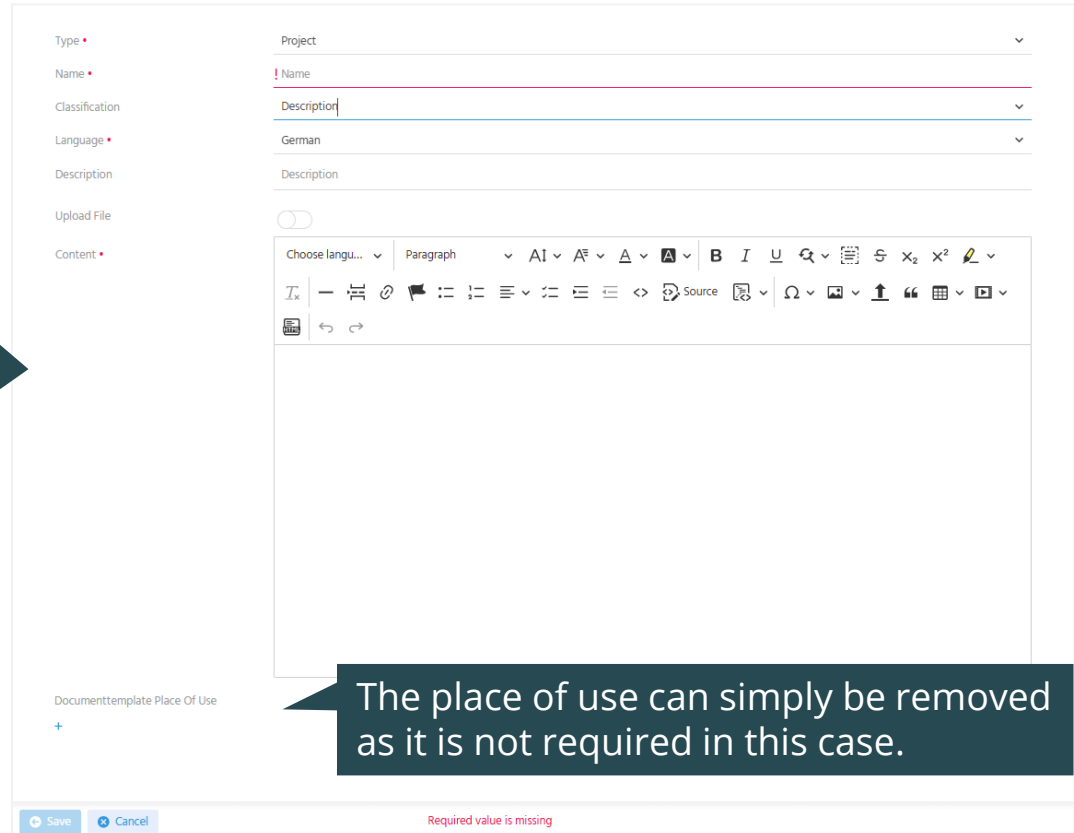
The screenshot shows a web form for defining a document template. The form has a left sidebar with labels: Type, Name, Classification, Language, Description, Upload File, and Content. The main area contains a form with the following fields: Type (set to 'Project'), Name (with a red exclamation mark and the text 'Name'), Classification (set to 'ProjectDescription'), Language (set to 'German'), and Description (set to 'Description'). Below these fields is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, link, and list. The editor area is currently empty. At the bottom left of the form, there is a label 'Documenttemplate Place Of Use' with a plus icon. At the bottom right, there is a red error message: 'Required value is missing'. The form has 'Save' and 'Cancel' buttons at the bottom left.

The place of use can simply be removed as it is not required in this case.

Document template

Template Description Projectticket

Document templates of the type "Project" with the classification "Description" can be stored in the definition of the ticket type. This means that the template is displayed in the description of every projectticket of this ticket type.



The screenshot shows the ADITO document template editor. On the left, a sidebar lists fields: Type (Project), Name (with a red exclamation mark), Classification (Description), Language (German), Description, Upload File, and Content. The main area displays the 'Name' field with a red error line and the 'Description' field with a blue border. Below these is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, and link. At the bottom, there is a 'Documenttemplate Place Of Use' section with a plus icon. A red error message 'Required value is missing' is visible at the bottom right.

Project

! Name

Description

German

Description

Choose langu... Paragraph A1 A² A₂ B I U Source Ω

Documenttemplate Place Of Use

Save Cancel

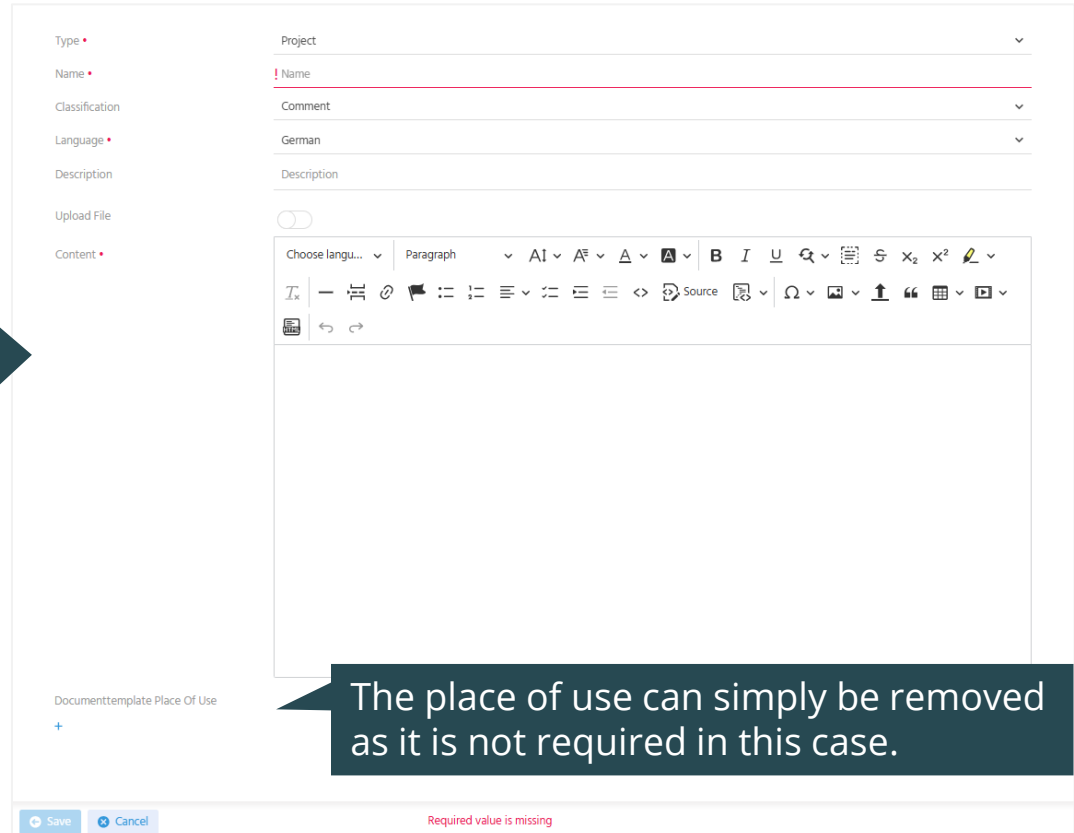
Required value is missing

The place of use can simply be removed as it is not required in this case.

Document template

Template Description Comment

Document templates of the type "Project" with the classification "Comment" can be stored in the definition of the ticket type. This means that the template can be selected in every comment of a project ticket.



The screenshot shows the ADITO document template editor. On the left is a sidebar with fields: Type (Project), Name (Name), Classification (Comment), Language (German), Description (Description), Upload File (disabled), and Content (empty). The main area on the right has a rich text editor with a toolbar containing options like Paragraph, Bold, Italic, Underline, Link, and others. Below the editor is a section labeled 'Documenttemplate Place Of Use' with a plus icon. At the bottom, there are 'Save' and 'Cancel' buttons, and a red error message 'Required value is missing'.

The place of use can simply be removed as it is not required in this case.

**Define
export templates
for ticket export**

Export Template

New creation



General information on the subject of “CSV export” and the creation of export templates can be found in the separate documentation.

Templatename •	Projecttickets
Description	<i>Description</i>
Status	active ×
Record separator •	CRLF ▼
Field separator •	semicolon ▼
Field delimiter •	quotation mark ▼
Charset •	UTF-8
Place of use •	Projectticket

In order for the export template to be selected for the projecttickets, “Projectticket” must be specified as the usage location.

Export Template

Define Export Template Fields

In the “Data structure” tab, you cannot enter a data structure in the xRM default configuration. The selection of contexts (e.g. comments or time booking) must be extended at this point using customizing.

The screenshot displays the 'Export Template' configuration page. On the left, a sidebar lists configuration options: Status (active), Record separator (CRLF), Field separator (semicolon), Field delimiter (quotation mark), Charset (UTF-8), and Place of use (Projectticket). The main area is divided into two tabs: 'Data structure' and 'Fields'. The 'Fields' tab is active, showing a table with columns for 'Sorting', 'Field (CRM)', and 'Place of Use'. A dark blue callout box points to the 'Fields' tab with the text: 'In the “Fields” tab, you can insert the required fields whose information is to be exported as CSV.' A red-bordered inset shows a dropdown menu for 'Field (CRM)' with options: 'Days without new comment', 'Description', 'Edited', 'Edited on', 'Editor', 'Last Ticket Comment', and 'minutes worked'. The 'Place of Use' dropdown is set to 'Projectticket (Projectticket)'. The bottom of the main area shows 'No data present'.

In the “Fields” tab, you can insert the required fields whose information is to be exported as CSV.

General information on the subject of “CSV export” and the creation of export templates can be found in the separate documentation.

This document is subject to copyright protection. Therefore all contents may only be used, saved or duplicated for designated purposes such as for ADITO workshops or ADITO projects. It is mandatory to consult ADITO first before changing, publishing or passing on contents to a third party, as well as any other possible purposes.



Einzigartige Beziehungen