

Jobsworth Project Management 4.0

jw40rel140117

Jobsworth Project Management 4.0: Installation and Manual

jw40rel140117

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Preface

Welcome to the jobsworth project management, support ticketing and CRM system. This software is licensed under the AGPLv3.

Jobsworth can be used for helpdesk support ticketing, customer liasion, resource management (eg. systems and password tracking) and has a range of CRM type functionality. Plan your projects, see your schedule, know if you're slipping behind and why. Time Tracking and extensive reports help you show your clients exactly what you've done and for how long.

- no restrictions or limits
- interactive gantt chart & scheduling
- flexible reporting
- tracks and indexes all changes
- notifications via email, rss & ical
- ldap integration
- accounting / billing system integration
- custom attributes
- inbound and outbound email integration
- sophisticated access control
- services (SLA)
- resources
- .. much much more

Further project details can be seen at [Ohloh \(https://www.ohloh.net/p/jobsworth\)](https://www.ohloh.net/p/jobsworth) .

Support

The primary support is through the [mailing list \(https://groups.google.com/forum/#!forum/jobsworth\)](https://groups.google.com/forum/#!forum/jobsworth) or if you have a bug report, [create an issue \(https://github.com/ari/jobsworth/issues\)](https://github.com/ari/jobsworth/issues) in the tracker. If you want to write up details of a new feature you'd like to see, please use the wiki [wiki \(https://github.com/ari/jobsworth/wiki\)](https://github.com/ari/jobsworth/wiki) .

Contributing

Code contributions are welcome to this project and the best way to go about it is to fork the git repository:

```
https://github.com/ari/jobsworth
```

Please read the DEVELOPMENT.md file in this directory for more information. Join the [developer mailing list \(https://groups.google.com/forum/#!forum/jobsworth-dev\)](https://groups.google.com/forum/#!forum/jobsworth-dev)  to discuss ideas or ask questions.

1 Installation

The base installation of Jobsworth 4.0 is very easy (big improvement to previous releases), once a server with some SQL-database and a servlet container has been set up. For those of you not setting up such servers frequently, I have added some more screenshots and commands, that might help you speeding up the installation process.



Note

The following installation instructions are based on FreeBSD® 9.2. Other Unix-like operating systems may also work, once a LAMP server has been set up. Especially pathes to configuration files differ in various distributions from FreeBSD® and have to be adapted individually.

First of all get an operating system on a dedicated machine running. Typically Jobsworth only uses server functionality, therefore a graphical user interface (e.g. Gnome or KDE) is not necessary. If you are new to server installation, such GUI would help you to find your way around (e.g. looking on the web for HowTo's).

1.1 Database

Install the database-server package. You can either use `mysql` or `postgresql`. The following example shows the setup of `mysql`. After invoking `mysql` from the command-line you should see a screen like this:

```
$ mysql
Welcome to the MySQL monitor. Commands end with -; or \g.
Your MySQL connection id is 6
Server version: 5.5.33 Source distribution

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Oracle is a registered trademark of Oracle Corporation and/or its
affiliates. Other names may be trademarks of their respective
owners.
```

```
Type -'help;' or -'\h' for help. Type -'\c' to clear current input statement.
```

```
mysql>
```



Important

If you see any minus-signs in the screenshot above: This is some unresolved rendering error problem (for PDFs only?). Be aware that those minus-signs shall NOT be typed as part of the configuration scripts that will follow.

Now type in the following commands to create the jobsworth database and an admin-user. Feel free to adjust database-name, user-id and password and note it for later configuration. Then quit mysql-console.

```
CREATE DATABASE mydb DEFAULT CHARACTER SET utf8
CREATE USER -'monty'@'localhost' IDENTIFIED BY -'some_pass';
GRANT ALL PRIVILEGES ON *.* TO -'monty'@'localhost' WITH GRANT OPTION
quit
```



Note

At a later stage in this installation process Jobsworth will setup all tables and initial data on its first call.

To enable the start of mysql during start of your server, the following entry has to be inserted into your startup configuration file (e.g. /etc/rc.conf)

```
mysql_enable="YES"
```

1.2 Apache

description t.b.d.

In any browser type in the URL of your Jobsworth server. For example:

```
http://172.20.50.4
```

A simple screen shows, that Apache is running.



It works!

FIGURE 1.1: **APACHE WORKS**

1.3 Servlet container

t.b.d.

In any browser type in the URL of your Jobsworth server followed by port 8080. For example:

```
http://172.20.50.4:8080
```

If you see the following screen, your Tomcat installation has been successful.

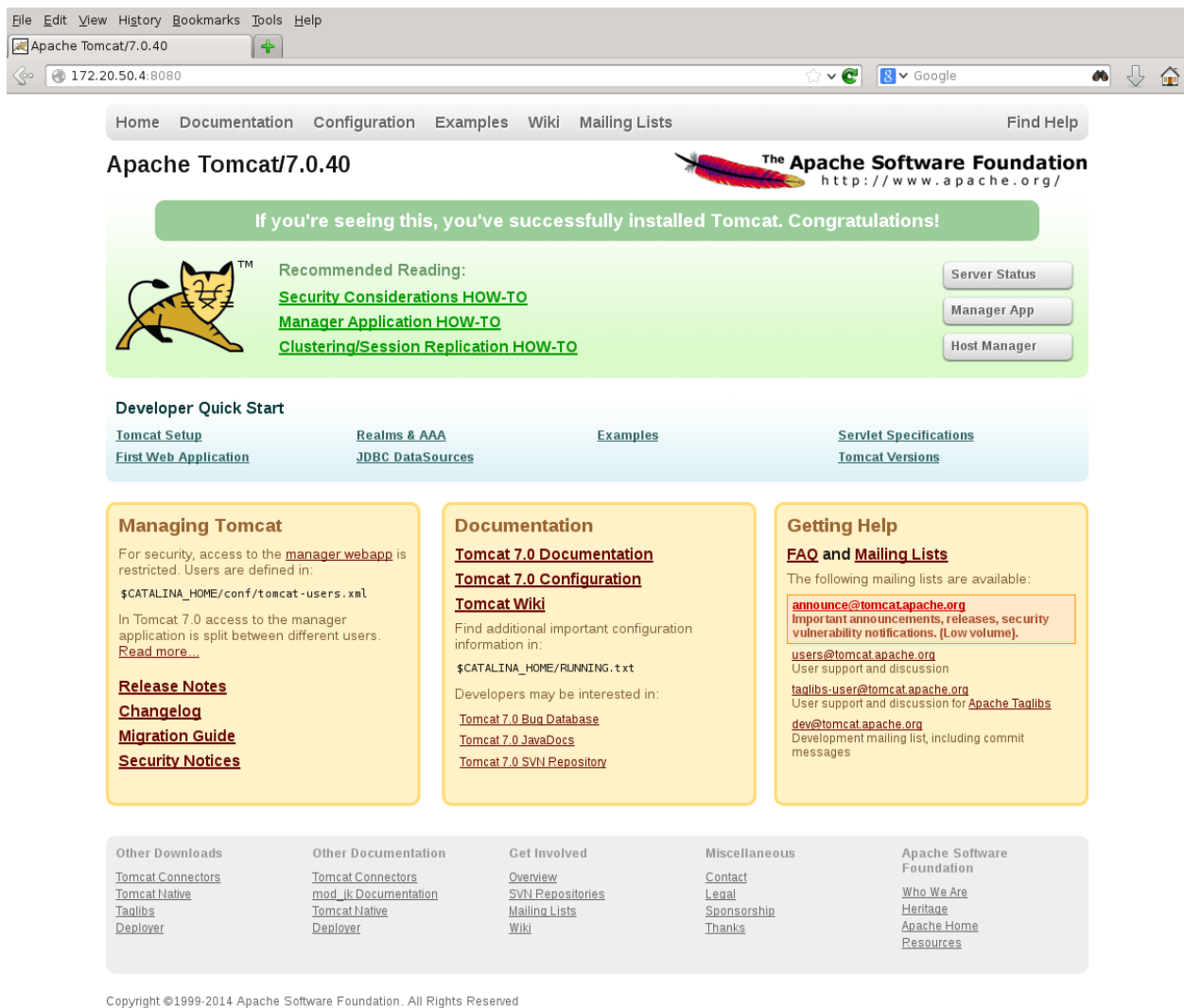


FIGURE 1.2: TOMCAT WORKS

1.4 E-Mail

t.b.d.

1.5 Jobsworth

t.b.d.

2 Administration

Administration-Guide

2.1 Login

After you have successfully managed the installation part, it's time to login and start exploring Jobsworth 4.0.

Open the browser of your choice (currently supported are: Internet Explorer, Firefox, Chrome) and type in the URL of your Jobsworth server followed by port 8080. For example:

```
http://172.20.50.4:8080
```

This will lead you to the following login screen.



Sign in

Invalid user or password

Username

Password

☐ Remember me

[Forget your password?](#)

FIGURE 2.1: LOGIN



Important

The default user after installation is *admin/password* . For security reasons change the password as soon as possible.

2.2 Menu Structure

Jobsworth needs some basic preparation (e.g. project and company setup), before each function can be used. Nevertheless the Author decided to describe the menu in the order it appears on the screen. A kind of workflow may be added later.

2.2.1 Overview

2.2.1.1 Dashboard

here we are

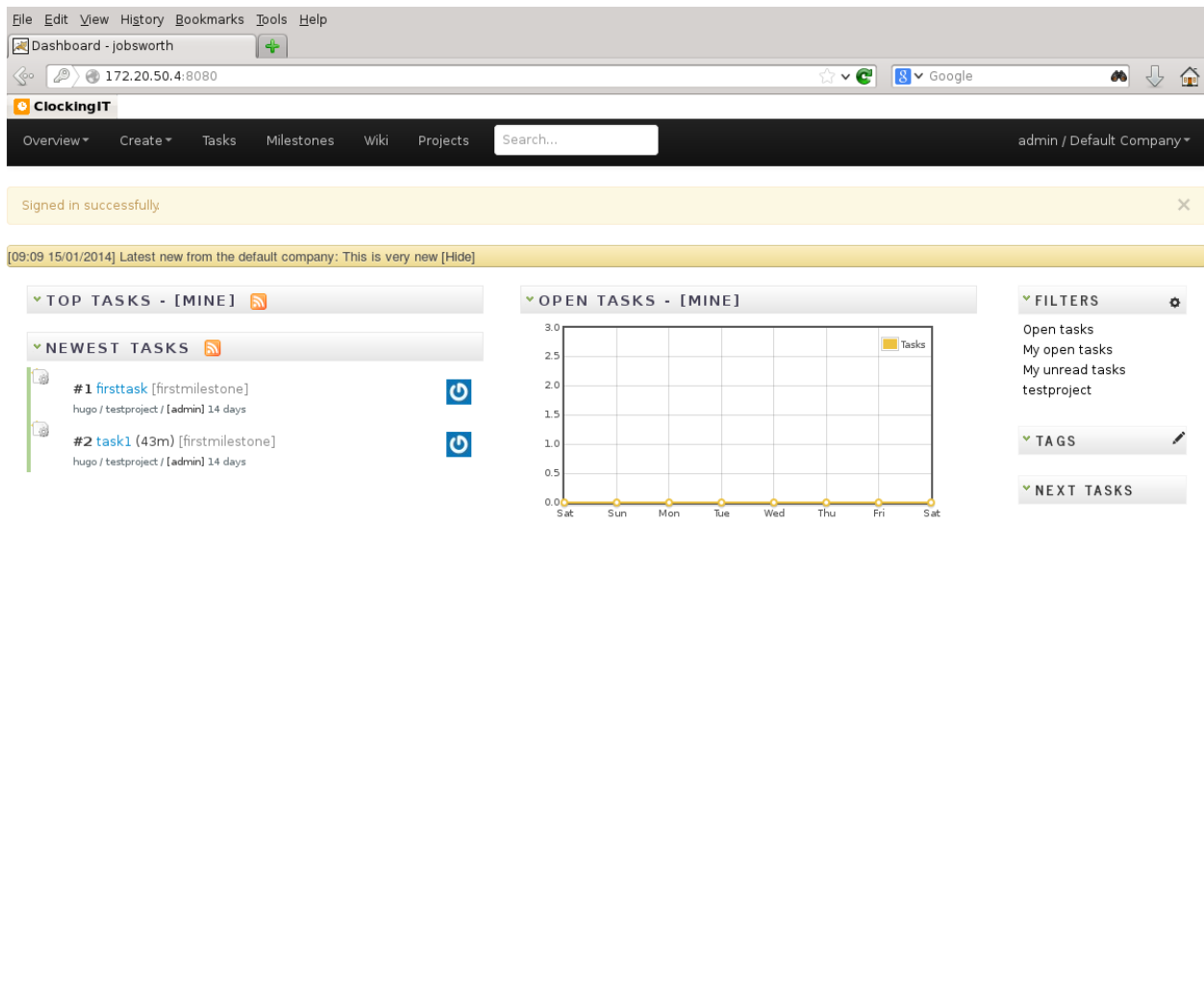


FIGURE 2.2: DASHBOARD

2.2.1.2 Planning

This screen will allow you to plan your tasks.



Note

This screen looks pretty empty after install and will make sense, once some tasks have been generated.

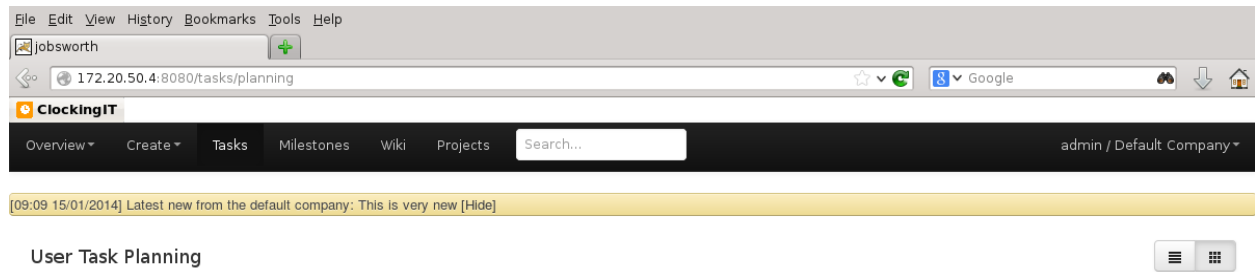


FIGURE 2.3: **PLANNING**

2.2.1.3 Billing

The screenshot shows a web browser window with the address bar displaying "172.20.50.4:8080/billing/list". The browser's address bar also shows "Billing - jobsworth" and a search bar with "Google". The page title is "ClockingIT". The navigation bar includes links for "Overview", "Create", "Tasks", "Milestones", "Wiki", and "Projects", along with a search bar and a user profile "admin / Default Company". A yellow notification bar at the top states: "[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]". The main content area is titled "Billing Reports". Below this title is a form with a "Time Sheet" dropdown menu. Under "Report filter", there are four dropdown menus: "[Any Project]", "[Any User]", "[All]", and "This Week". Below these filters are two checkboxes: "Hide approved logs" and "Hide rejected logs". A blue "Run Report" button is located at the bottom of the form.

FIGURE 2.4: BILLING

2.2.1.4 History

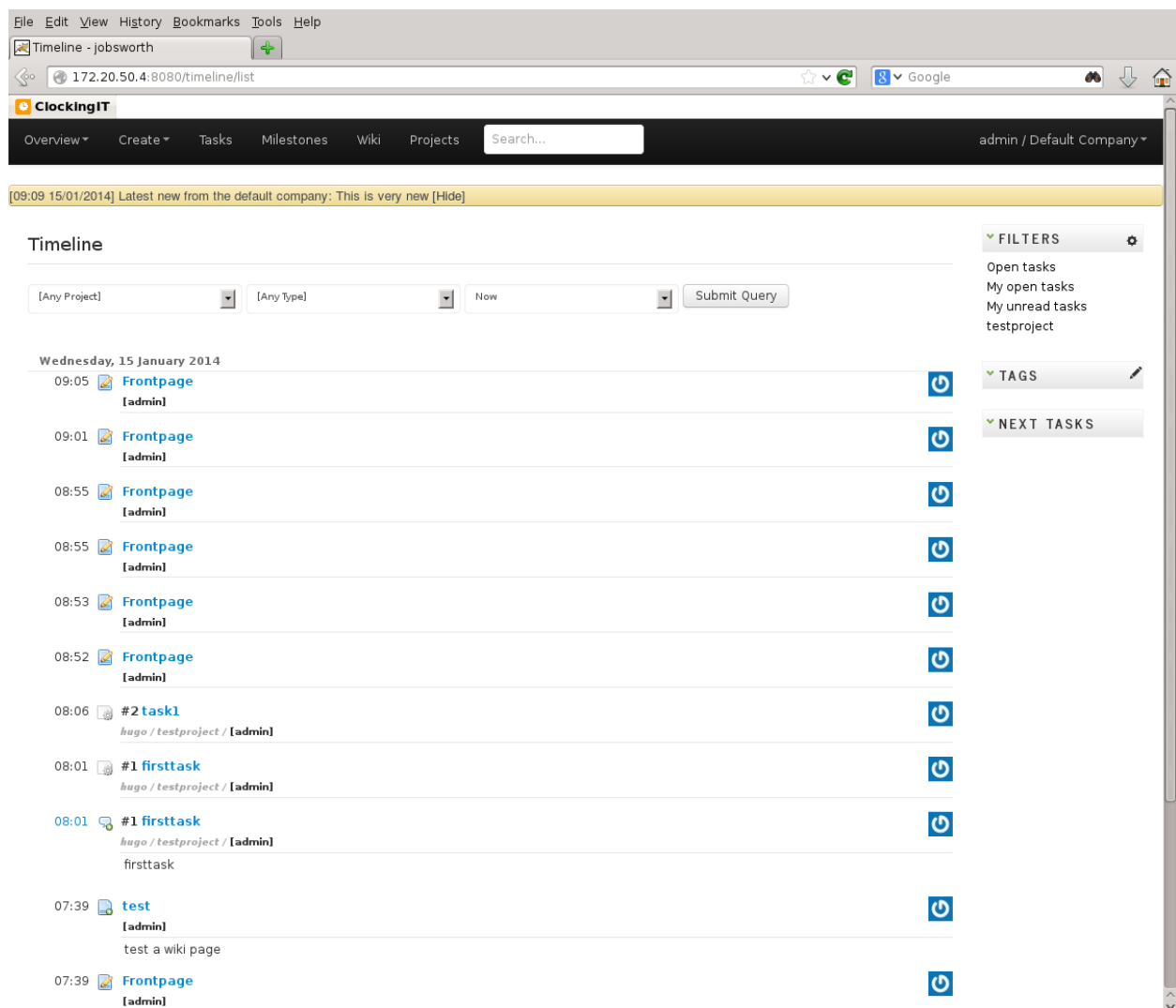


FIGURE 2.5: HISTORY

2.2.2 Create

2.2.2.1 Create Task

File Edit View History Bookmarks Tools Help

New Task - jobsworth

172.20.50.4:8080/tasks/new

ClockingIT

Overview Create Tasks Milestones Wiki Projects Search...

admin / Default Company

[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]

Enter task name...

Add a todo item...

Project Please select

Milestone [None]

Time 1h (default)

Estimate

Target Date

Resolution Open

Enter task description...

Add a comment...

Save

Attributes

Tags

Type Task

Priority Normal

Severity Normal

Service [None]

billable

Notifications

Companies

Users To Notify

admin

Snooze until

Until customer responds

Snooze until

Resources

Linked

Resources

FILTERS

Open tasks

My open tasks

My unread tasks

testproject

TAGS

NEXT TASKS

FIGURE 2.6: CREATE TASK

2.2.2.2 Create Project

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/projects/new'. The browser's title bar says 'New Project - jobsworth'. The page header for 'ClockingIT' includes navigation links: Overview, Create, Tasks, Milestones, Wiki, and Projects, along with a search bar and a user profile 'admin / Default Company'. A yellow notification bar at the top of the page content area reads: '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The main section is titled 'New Project' and contains the following form fields:

- Name:** A text input field.
- Company:** A text input field with a small icon to its right.
- Default Estimate:** A text input field containing the value '1.0'.
- Description:** A large text area.
- Copy permissions from:** A dropdown menu currently showing 'None'.

At the bottom of the form is a blue 'Create' button. On the right side of the form, there are three expandable sections:

- FILTERS:** Includes links for 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'.
- TAGS:** A section with a pencil icon for editing.
- NEXT TASKS:** A section for viewing upcoming tasks.

FIGURE 2.7: CREATE PROJECT

2.2.2.3 Create Milestone

The screenshot shows a web browser window with the URL `172.20.50.4:8080/milestones/new`. The application is 'ClockingIT' and the user is 'admin / Default Company'. The main navigation bar includes 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects'. A search bar is also present. A status bar at the top shows the time '09:09 15/01/2014' and a message 'Latest new from the default company: This is very new [Hide]'. The 'New Milestone' form contains the following fields:

- Project:** A dropdown menu with 'testproject' selected.
- Name:** An empty text input field.
- Status:** A dropdown menu with 'planning' selected. Below it, a note reads: 'planning (can add tasks, all tasks are snoozed)'.
- Due Date:** An empty date input field.
- Description:** A large empty text area.

At the bottom of the form is a blue 'Create' button. On the right side of the form, there are three expandable sections:

- FILTERS:** Includes links for 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'.
- TAGS:** Includes an edit icon.
- NEXT TASKS:** A section for upcoming tasks.

FIGURE 2.8: CREATE MILESTONE

2.2.2.4 Create Person

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/users/new'. The browser's user interface includes a menu bar (File, Edit, View, History, Bookmarks, Tools, Help), a toolbar with a search icon, and a navigation bar for 'ClockingIT' with links to Overview, Create, Tasks, Milestones, Wiki, and Projects. A search bar and a user profile 'admin / Default Company' are also visible in the navigation bar. Below the navigation bar, a yellow status bar shows a timestamp and a message: '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The main content area is titled 'New user' and contains a form with the following fields: Name, Email, Username, Password, Company (with a refresh icon), color (set to 'blue'), Send welcome email (checkbox), Signup Message (text area with placeholder 'input welcome message here'), and Copy permissions from (dropdown menu set to 'No one'). A 'Create' button is located at the bottom of the form. A small note at the bottom of the Signup Message field states: 'The message will be included in the signup email.'

File Edit View History Bookmarks Tools Help

User: jobsworth

172.20.50.4:8080/users/new

ClockingIT

Overview Create Tasks Milestones Wiki Projects Search...

admin / Default Company

[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]

New user

Name

Email

Username

Password

Company

color blue

Send welcome email

Signup Message

input welcome message here

The message will be included in the signup email.

Copy permissions from No one

Create

FIGURE 2.9: CREATE PERSON

2.2.2.5 Create Company

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/customers/new'. The browser's address bar also shows 'New Customer - jobsworth' and a green plus icon. The browser's search bar contains 'Google'. The web application's header is black with the 'ClockingIT' logo on the left and a search bar with 'Search...' in the center. The user is logged in as 'admin / Default Company'. A yellow notification bar at the top of the page reads '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The main content area is titled 'New Customer' and contains a form with three fields: 'Name' (text input), 'Contact name' (text input), and 'Active' (checkbox, checked). A blue 'Create' button is at the bottom of the form. On the right side of the page, there are three sections: 'FILTERS' (with a gear icon) containing 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'; 'TAGS' (with a pencil icon); and 'NEXT TASKS'.

FIGURE 2.10: CREATE COMPANY

2.2.2.6 Create Resource

The screenshot shows a web browser window with the URL `172.20.50.4:8080/resources/new`. The application is 'ClockingIT' and the user is 'admin / Default Company'. A status bar at the top shows the time '09:09 15/01/2014' and a message 'Latest new from the default company: This is very new [Hide]'. The main form is titled 'New Resource' and contains the following fields:

- Name:
- Company:
- Parent Resource:
- Type:
- Active: ☒
- Notes:

Below the form is an 'Attributes' section with a 'Create' button. On the right side, there are three expandable sections:

- FILTERS** (gear icon): Open tasks, My open tasks, My unread tasks, testproject
- TAGS** (pencil icon)
- NEXT TASKS**

FIGURE 2.11: CREATE RESOURCE

2.3 Widgets

2.4 Workflow