

Jobsworth Project Management 4.0

jw40doc.140120

Jobsworth Project Management 4.0: Installation and Manual

jw40doc.140120

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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

Copyright (c) 2000, 2013, Oracle and/or its affiliates. All rights reserved.
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.

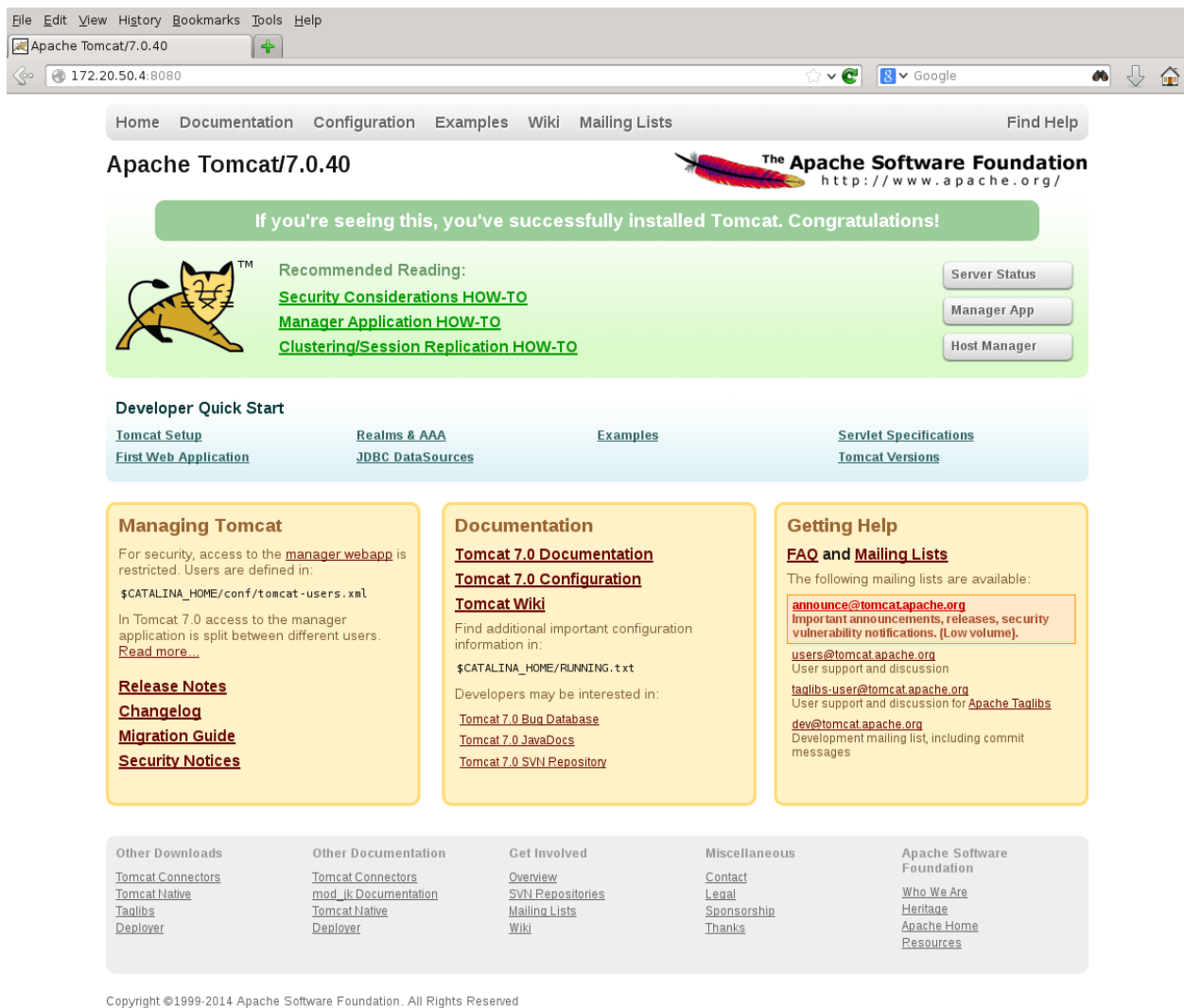


FIGURE 1.2: TOMCAT WORKS

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.



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 Items

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

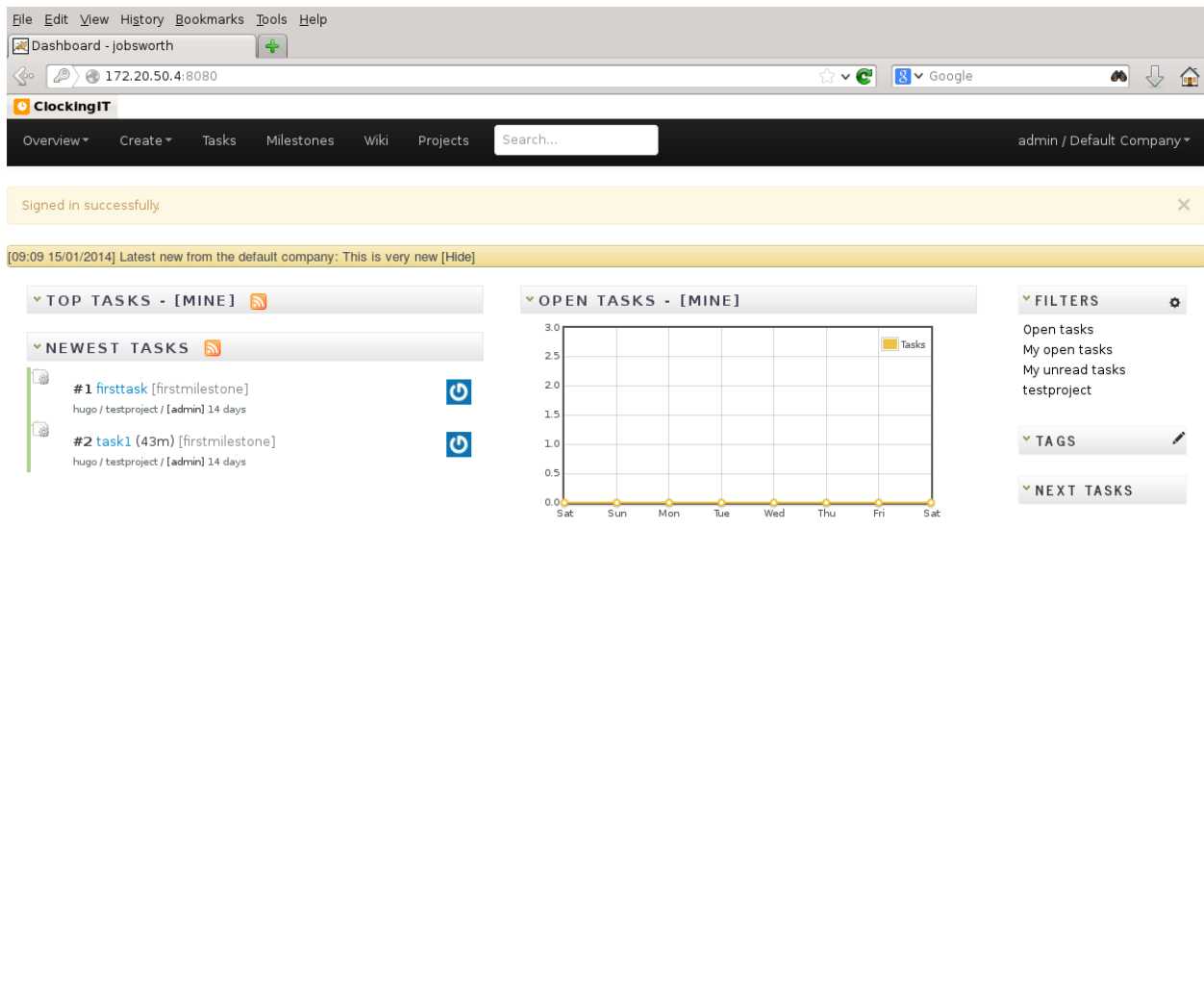


FIGURE 2.2: DASHBOARD

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.

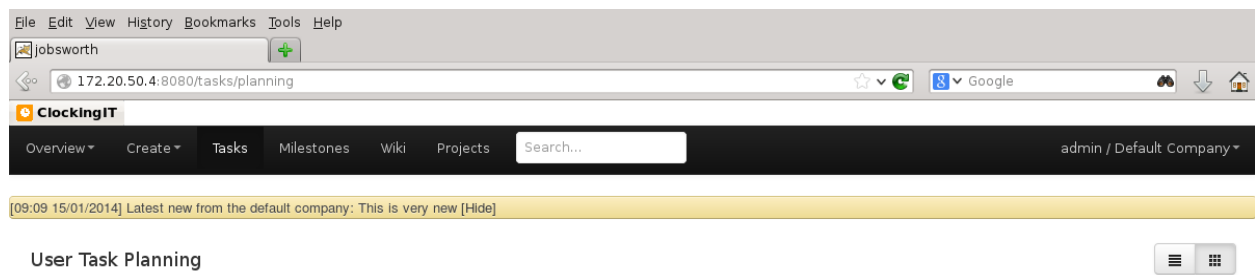


FIGURE 2.3: PLANNING

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]".

Billing Reports

Time Sheet

Report filter

[Any Project] [Any User] [All] This Week

☐ Hide approved logs ☐ Hide rejected logs

FIGURE 2.4: BILLING

2.2.1.4 History

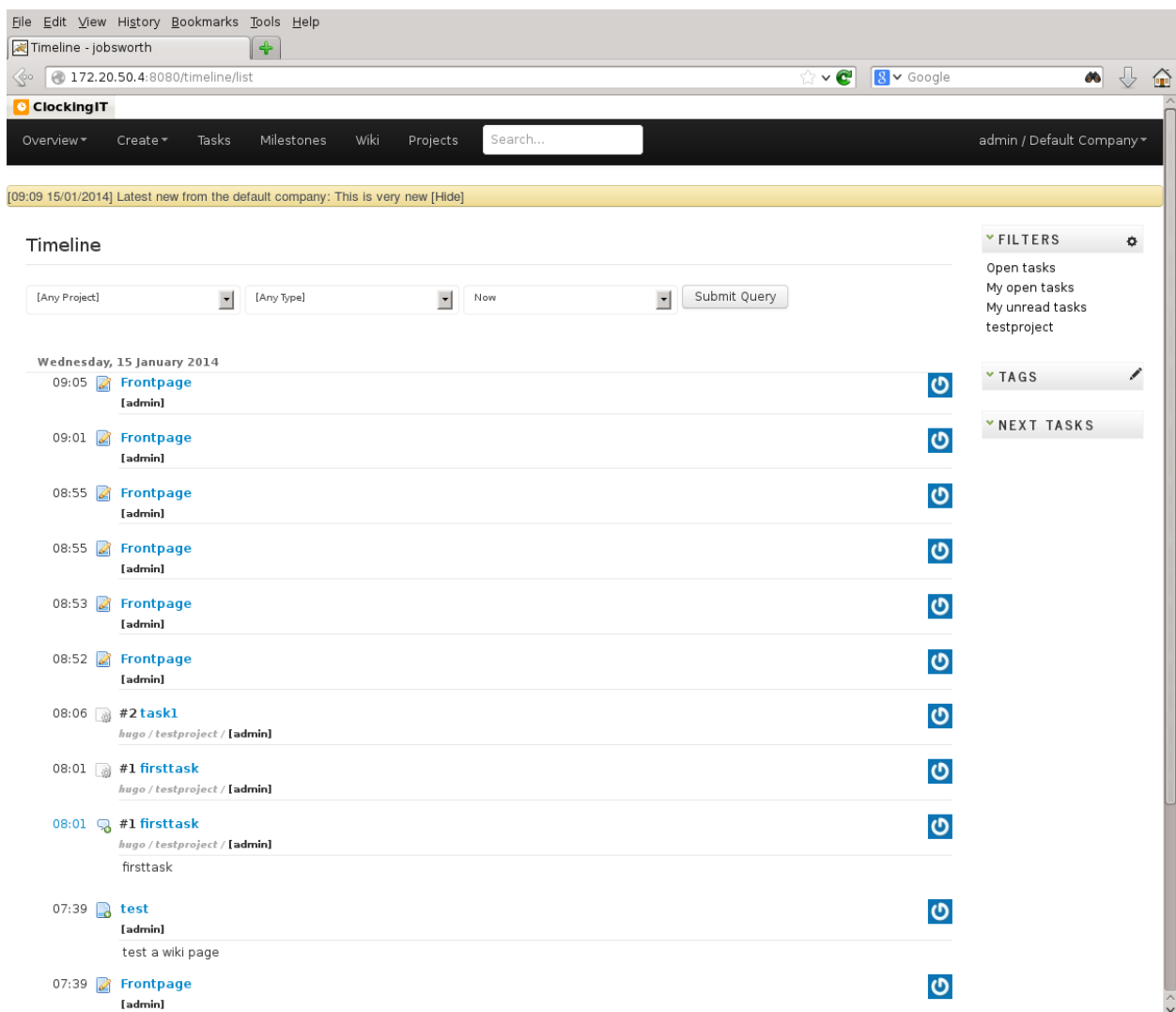


FIGURE 2.5: HISTORY

2.2.2 Create

2.2.2.1 Create Task

The screenshot shows a web browser window titled "New Task - jobsworth" with the URL "172.20.50.4:8080/tasks/new". The browser's address bar shows "172.20.50.4:8080/tasks/new". The page header includes a menu bar with "File", "Edit", "View", "History", "Bookmarks", "Tools", and "Help". Below the menu bar is a navigation bar with "Overview", "Create", "Tasks", "Milestones", "Wiki", and "Projects", along with a search bar and the user "admin / Default Company". A yellow banner 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 form is titled "Enter task name..." and includes a "Add a todo item..." button. The form fields are as follows:

- Project:** Please select (dropdown)
- Milestone:** [None] (dropdown)
- Time Estimate:** 1h (default) (text input)
- Target Date:** (text input)
- Resolution:** Open (dropdown)
- Attributes:**
 - Tags:** (text input)
 - Type:** Task (dropdown)
 - Priority:** Normal (dropdown)
 - Severity:** Normal (dropdown)
 - Service:** [None] (dropdown)
 - billable:** (checkbox)
- Notifications:**
 - Companies:** (text input)
 - Users To Notify:** admin (text input)
- Snooze until:** (text input)
- Resources:** (text input)

The form also includes a "Save" button and a "Filters" section on the right with "Open tasks", "My open tasks", "My unread tasks", and "testproject". The "Tags" section includes "TAGS" and "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 status bar at the top of the page 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 Project' and contains a form with the following fields: 'Name' (text input), 'Company' (text input with a selection icon), 'Default Estimate' (text input with '1.0'), 'Description' (large text area), and 'Copy permissions from' (dropdown menu with 'None' selected). A blue 'Create' button is located at the bottom of the form. On the right side of the page, there are three sidebar sections: 'FILTERS' with a settings icon and a list of 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'; 'TAGS' with an edit icon; and 'NEXT 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 '[09:09 15/01/2014]' and a message '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' (text input), 'Email' (text input), 'Username' (text input), 'Password' (text input), 'Company' (text input with a refresh icon), 'color' (dropdown menu showing 'blue'), 'Send welcome email' (checkbox), 'Signup Message' (text area with placeholder 'input welcome message here'), and 'Copy permissions from' (dropdown menu showing 'No one'). A blue 'Create' button is located at the bottom of the form. A small note at the bottom of the text area 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

Send welcome email ☐

Signup Message

The message will be included in the signup email.

Copy permissions from

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 title bar says 'New Customer - jobsworth'. The application's header includes a menu with '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 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 the following fields: 'Name' (text input), 'Contact name' (text input), and 'Active' (checkbox, which is checked). A blue 'Create' button is located at the bottom of the form. On the right side of the page, there are three expandable 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 address bar displaying '172.20.50.4:8080/resources/new'. The browser's title bar reads 'New Resource - New Resource - j...'. The page header for 'ClockingIT' includes a navigation menu with 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects', along with a search bar and a user profile 'admin / Default Company'. A status bar at the top of the page 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 Resource' and contains a form with the following fields: 'Name' (text input), 'Company' (text input with a selection icon), 'Parent Resource' (text input), 'Type' (dropdown menu), 'Active' (checkbox, currently checked), and 'Notes' (large text area). To the right of the form are three sidebar sections: 'FILTERS' with a settings icon and a list of 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'; 'TAGS' with an edit icon; and 'NEXT TASKS'. Below the form, an 'Attributes' section contains a single 'Create' button.

FIGURE 2.11: CREATE RESOURCE

2.2.3 Tasks

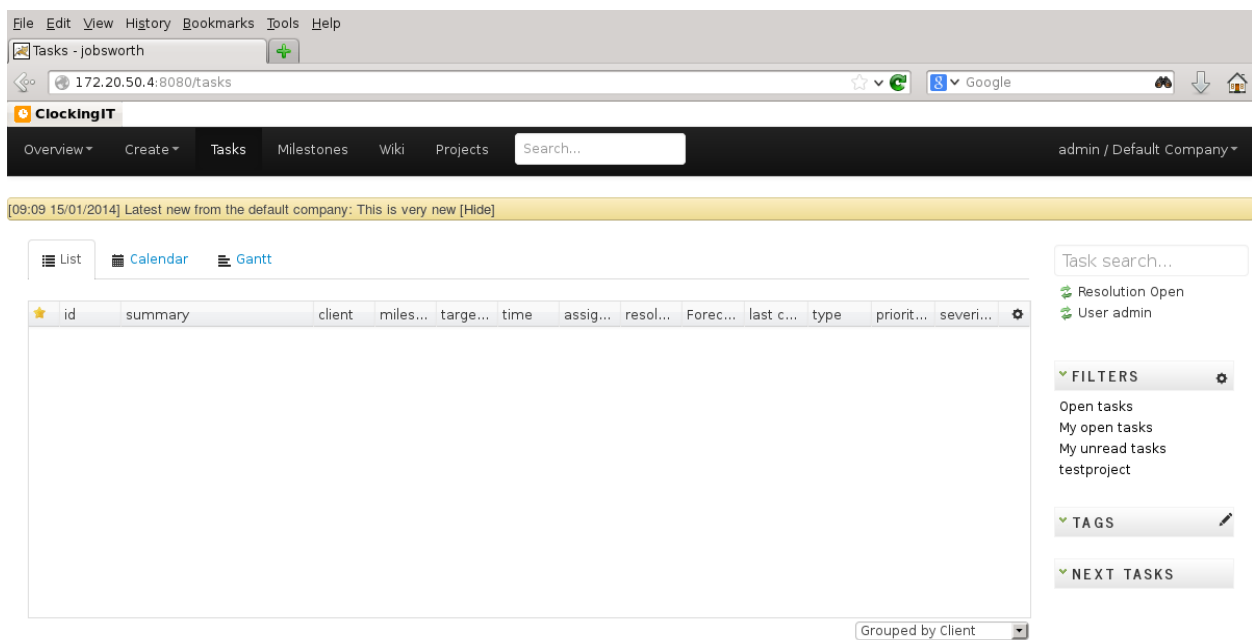


FIGURE 2.12: TASKS

2.2.4 Milestones

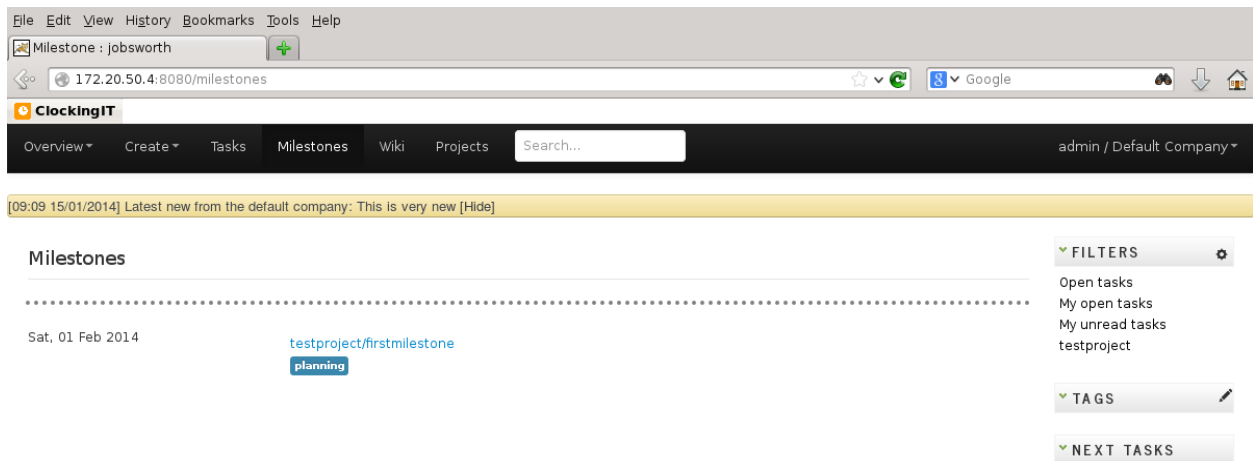


FIGURE 2.13: MILESTONES

2.2.5 Wiki

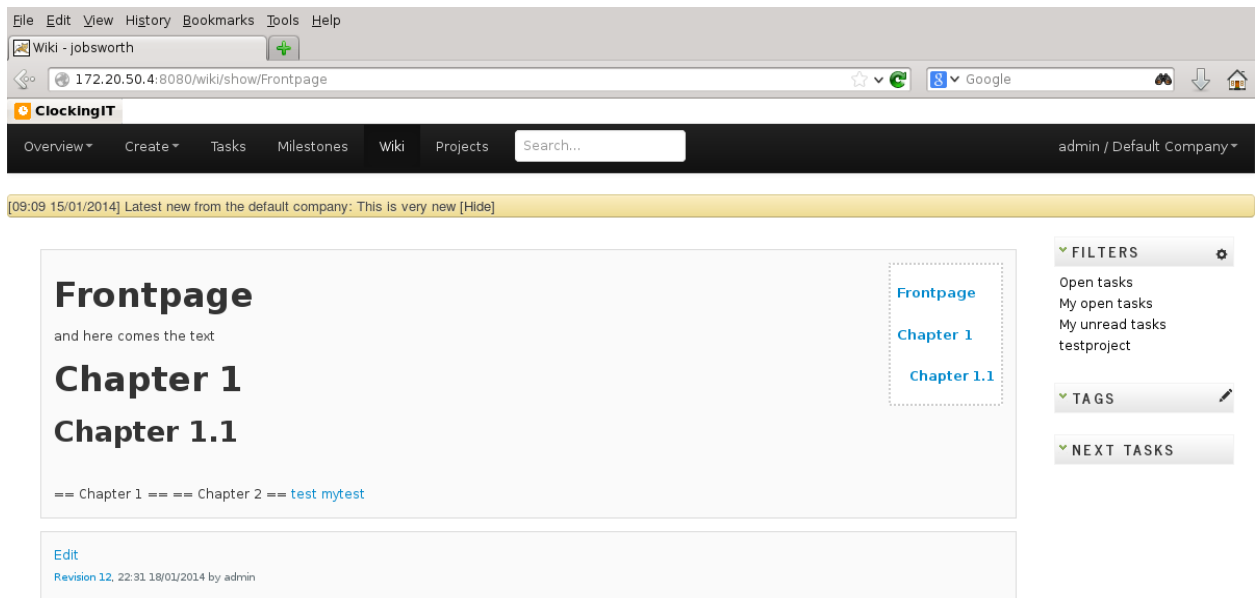


FIGURE 2.14: WIKI

2.2.6 Projects

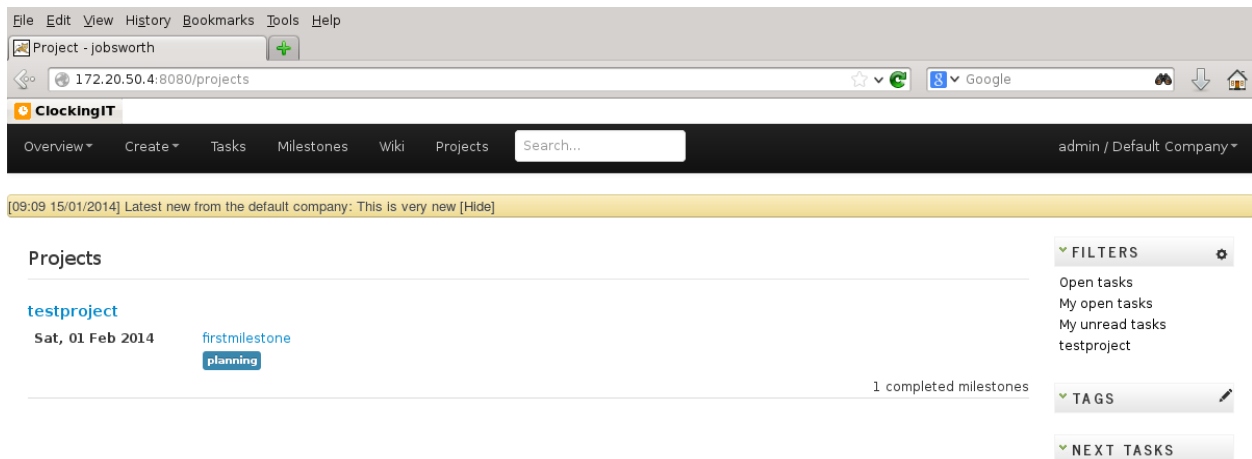


FIGURE 2.15: PROJECTS

2.2.7 MyAccount

2.2.7.1 General

FIGURE 2.16: GENERAL

2.2.7.2 Access Control

The screenshot shows the ClockingIT web application interface. The browser address bar displays '172.20.50.4:8080/users/1/access'. The application header includes a menu with 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects', along with a search bar and the user 'admin / Default Company'. A notification bar at the top states: '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. On the left, the 'ADMIN' sidebar has 'Access Control' selected. The main content area is titled 'admin' and contains a list of permissions with checkboxes: 'Administrator', 'Can Create Projects', 'Read client details', 'Create clients', 'Edit client details', 'Approve work logs', and 'Access Resources', all of which are checked. Below these is a 'Comment access level' dropdown menu and a 'Widget Key' field with the value '916feaf369f78f88e1c8fd70a9f7f3e0'. A 'Save' button is at the bottom.

Permission	Status
Administrator	<input checked="" type="checkbox"/>
Can Create Projects	<input checked="" type="checkbox"/>
Read client details	<input checked="" type="checkbox"/>
Create clients	<input checked="" type="checkbox"/>
Edit client details	<input checked="" type="checkbox"/>
Approve work logs	<input checked="" type="checkbox"/>
Access Resources	<input checked="" type="checkbox"/>

Comment access level:

Widget Key: 916feaf369f78f88e1c8fd70a9f7f3e0

[Save](#)

FIGURE 2.17: ACCESS CONTROL

2.2.7.3 E-Mail Addresses

The screenshot shows the ClockingIT web application interface. The browser address bar displays '172.20.50.4:8080/users/1/emails'. The application header is identical to the previous screenshot. The 'ADMIN' sidebar on the left has 'Email Addresses' selected. The main content area is titled 'admin' and shows a list of email addresses. One address, 'admin@example.org', is listed with a 'Default' status. Below this is an input field for 'input email address' and an 'Add' button.

Email Address	Status
admin@example.org	Default

[Add](#)

FIGURE 2.18: E-MAIL ADDRESSES

2.2.7.4 Task Filters

The screenshot shows the ClockingIT web application interface. The browser address bar displays '172.20.50.4:8080/users/1/filters'. The application header includes a menu with 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects', along with a search bar and the user name 'admin / Default Company'. A sidebar on the left lists administrative options: 'ADMIN', 'General', 'Access Control', 'Email Addresses', 'Task Filters' (highlighted), 'Projects Permissions', and 'Work Plan'. The main content area is titled 'admin' and 'Shared filters', indicating that no filters have been shared. Below this, the 'My filters' section shows a single filter named 'testproject Shared' with 'Hide' and 'Delete' options. A 'View Tasks' button is located in the top right corner.

FIGURE 2.19: TASK FILTERS

2.2.7.5 Projects Permissions

The screenshot shows the ClockingIT web application interface for the 'Projects Permissions' page. The browser address bar displays '172.20.50.4:8080/users/1/projects'. The application header and sidebar are consistent with the previous screenshot, with 'Projects Permissions' highlighted in the sidebar. The main content area is titled 'admin' and features a 'New user' button. A table lists permissions for the 'testproject' across various actions. All permissions are currently granted, indicated by green checkmarks. Below the table, there is a section to 'Add project to user' with an input field.

Project	Read	Comment	Work	Close	See Unwatched	Create	Edit	Assign	Milestone	Reports	Grant	All
testproject	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

FIGURE 2.20: PROJECTS PERMISSIONS

2.2.7.6 Work Plan

File Edit View History Bookmarks Tools Help

User: admin - jobsworth

172.20.50.4:8080/users/1/workplan

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]

ADMIN

- General
- Access Control
- Email Addresses
- Task Filters
- Projects Permissions
- Work Plan

admin [New user](#)

Recent work

- last Wed #2 task1 (43m spent)
- last Wed #2 task1 (43m spent)
- last Wed #1 firsttask (0m spent)
- last Wed #1 firsttask (0m spent)

Next Tasks

Work Plan

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.0	8.0	8.0	8.0	8.0	0.0	0.0

[Update](#)

FIGURE 2.21: WORK PLAN

2.2.8 Company Admin

2.2.8.1 General

File Edit View History Bookmarks Tools Help

Company Settings - jobsworth

172.20.50.4:8080/companies/1/edit

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]

ADMIN PANEL

- General
- Score Rules
- Task Templates
- Triggers
- Services
- News items
- Snippets
- Orphaned Emails

PROPERTIES

- Person
- Company
- Company Location
- Work Log
- Task
- Resource Type

Company Settings

Company name: Default Company

Use Wiki: ☒

Use Resources: ☒

Use Billing: ☒

Use Score Rules: ☒

Suppressed email addresses:

(separate emails by comma or new line)

Incoming Email Project:

New Logo: No file selected.

(250x50px should look good. The logo will be shown up top instead of the Jobsworth one, and on your login page.)

FIGURE 2.22: GENERAL

2.2.8.2 Score Rules

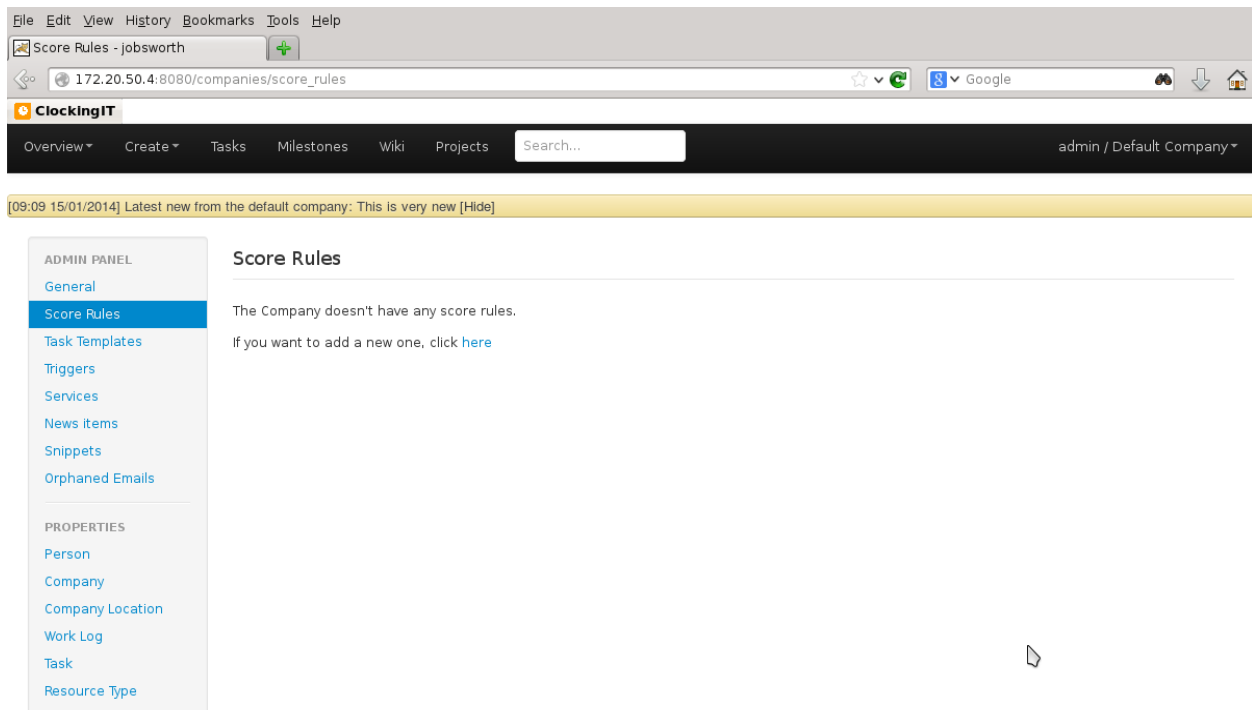


FIGURE 2.23: SCORE RULES

2.2.8.3 Task Templates

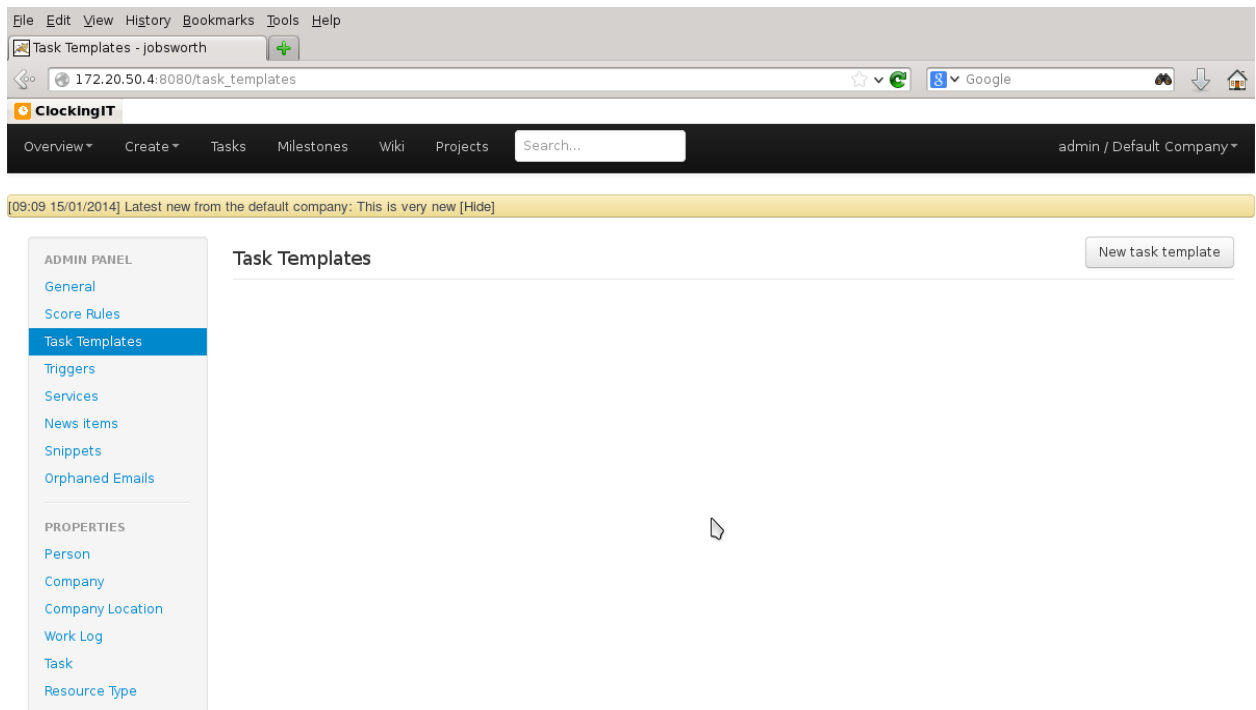


FIGURE 2.24: TASK TEMPLATES

File Edit View History Bookmarks Tools Help

New Task - jobsworth

172.20.50.4:8080/task_templates/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

Save

Enter task description...

FILTERS

Open tasks

My open tasks

My unread tasks

testproject

TAGS

NEXT TASKS

Attributes

Tags

Type Task

Priority Normal

Severity Normal

Service [None]

billable

Notifications

Companies

Users To Notify

admin

FIGURE 2.25: NEW TASK TEMPLATE

2.2.8.4 Triggers

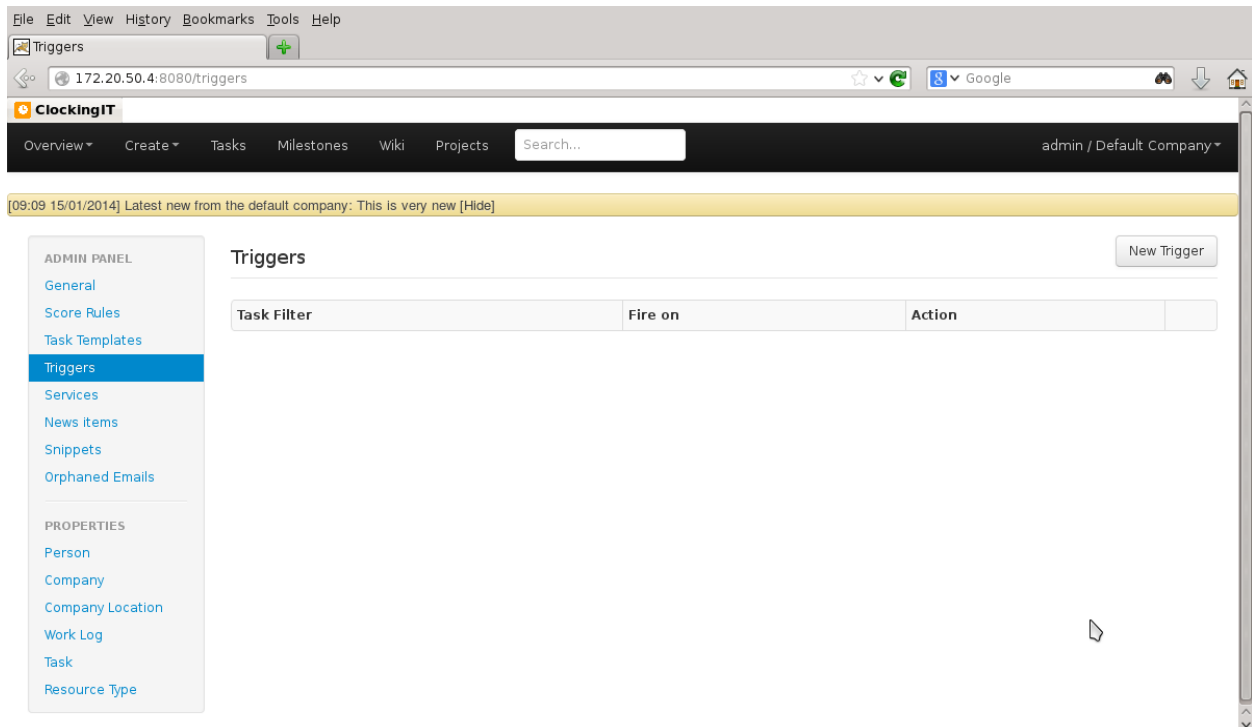


FIGURE 2.26: TRIGGERS

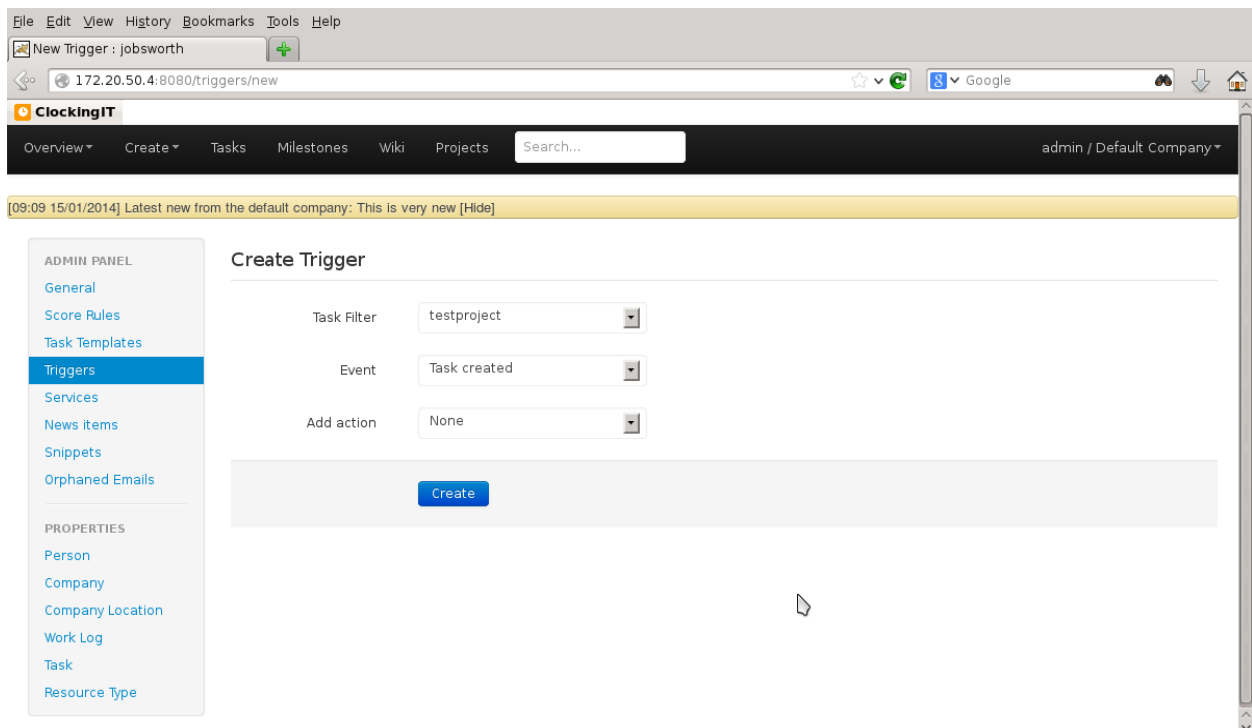


FIGURE 2.27: NEW TRIGGER

2.2.8.5 Services

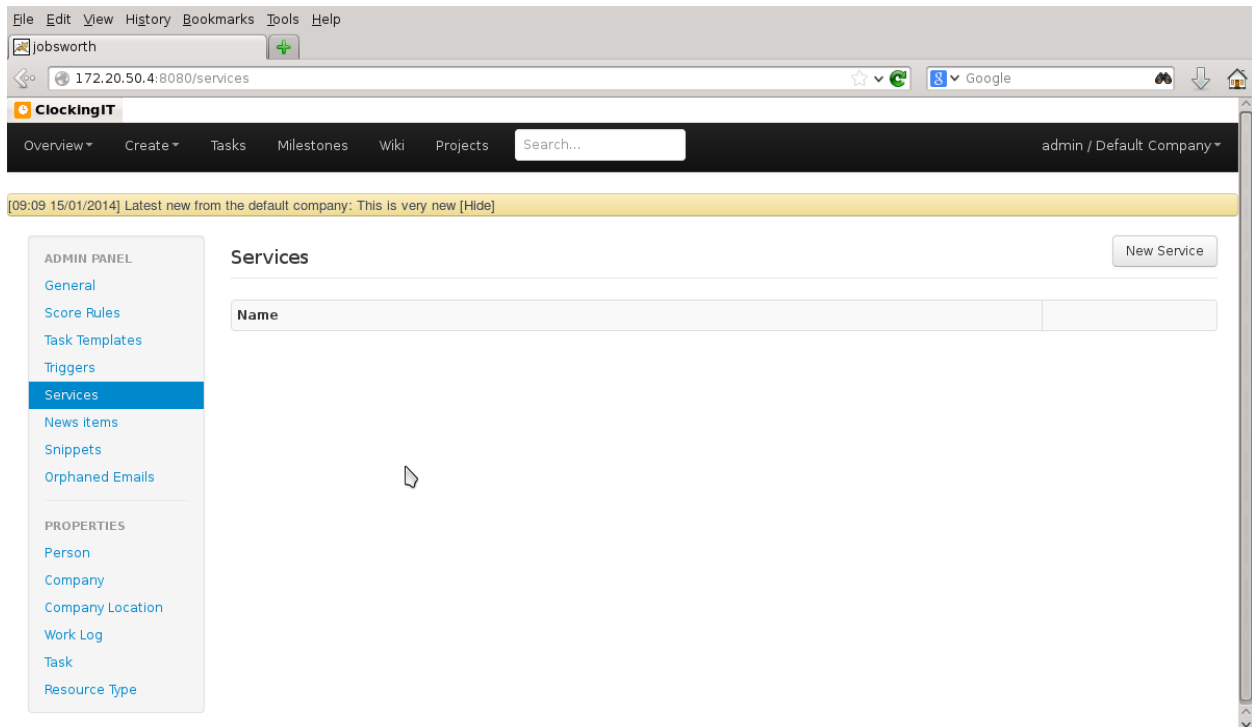


FIGURE 2.28: SERVICES

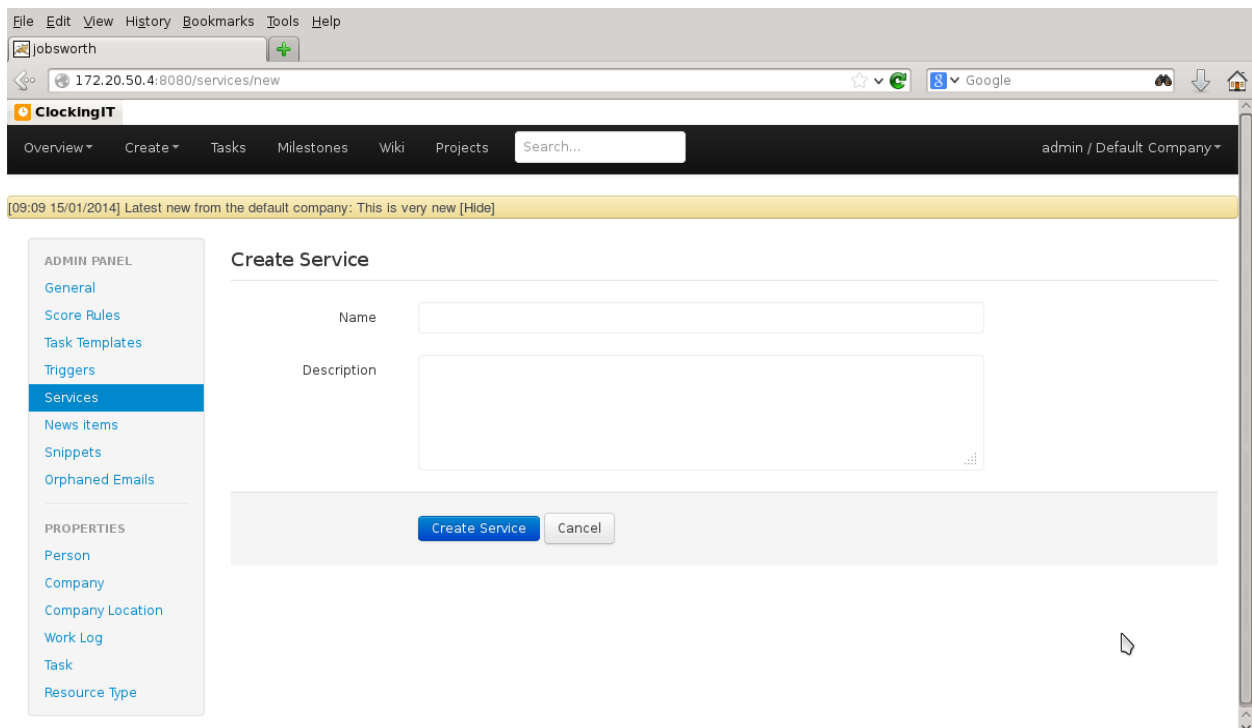


FIGURE 2.29: NEW SERVICE

2.2.8.6 News Items

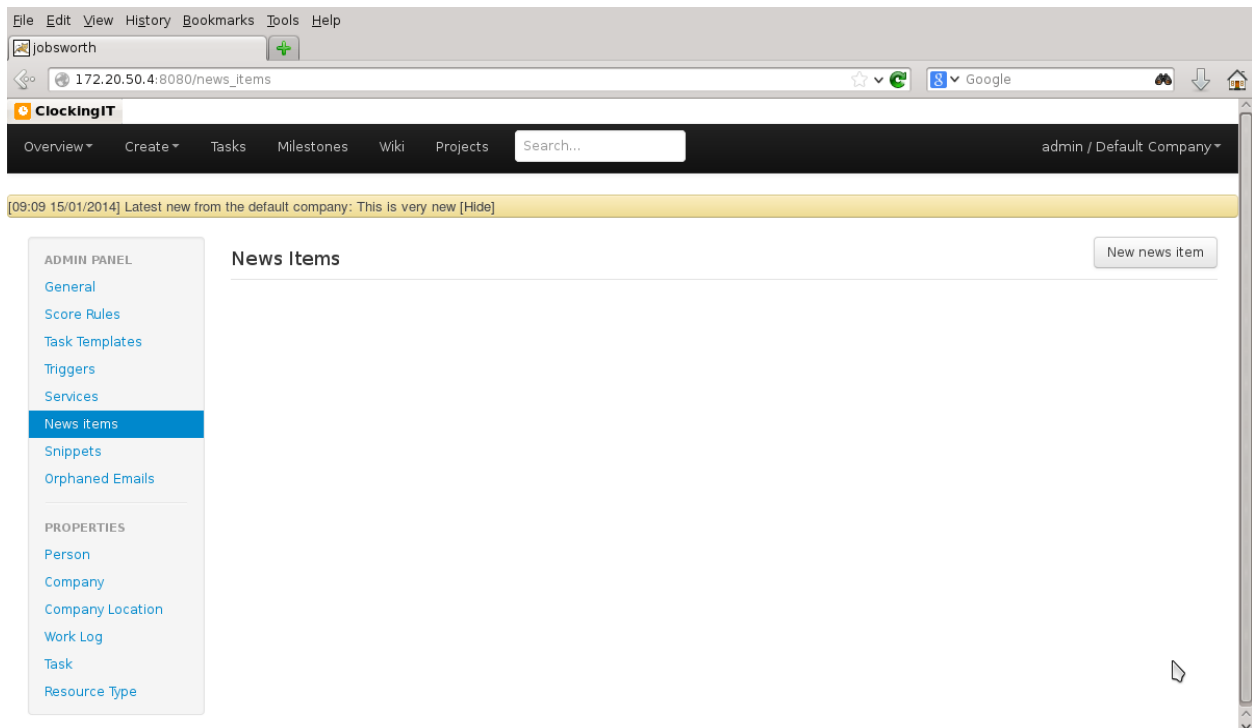


FIGURE 2.30: NEWS ITEMS

File Edit View History Bookmarks Tools Help

jobsworth

172.20.50.4:8080/news_items/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]

ADMIN PANEL

- General
- Score Rules
- Task Templates
- Triggers
- Services
- News Items**
- Snippets
- Orphaned Emails

PROPERTIES

- Person
- Company
- Company Location
- Work Log
- Task
- Resource Type

Create News Item

Body

Public

☒

Create

FIGURE 2.31: CREATE NEWS ITEM

2.2.8.7 Snippets

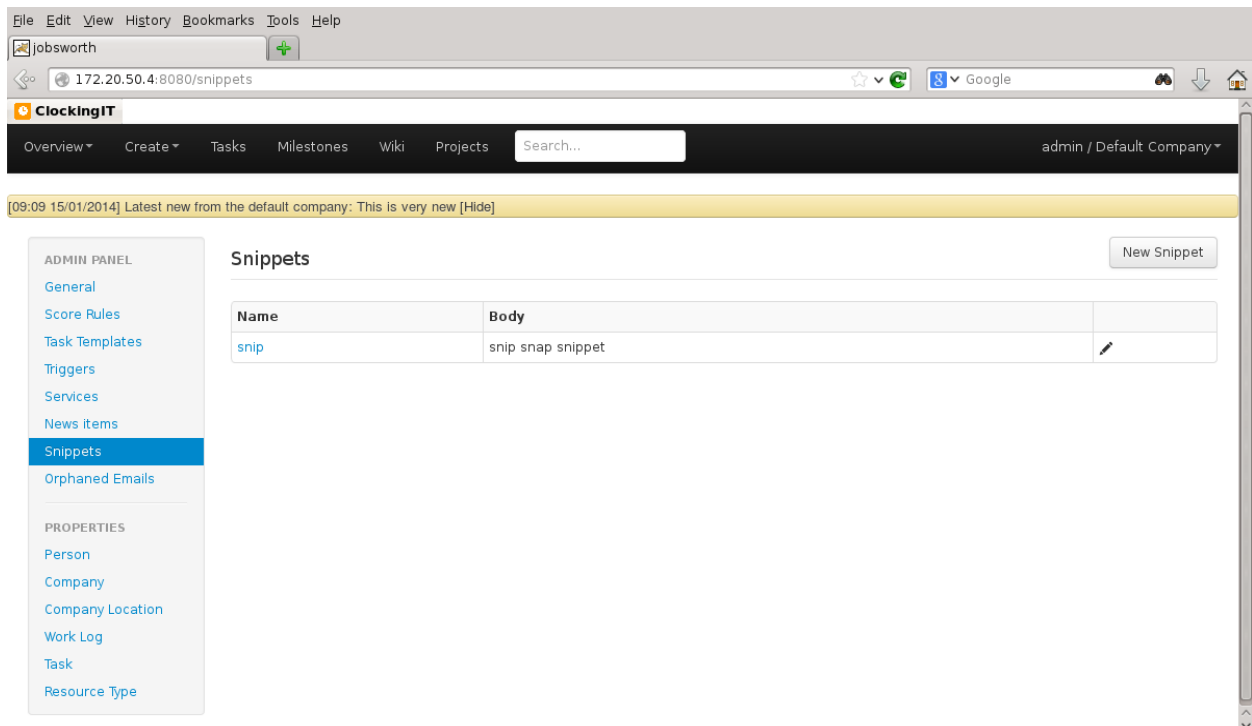


FIGURE 2.32: SNIPPETS

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/snippets/new'. The browser's menu bar includes 'File', 'Edit', 'View', 'History', 'Bookmarks', 'Tools', and 'Help'. The page title is 'ClockingIT'. The navigation bar contains 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', 'Projects', a search bar, and a user profile 'admin / Default Company'. A yellow notification bar at the top reads '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The left sidebar is divided into 'ADMIN PANEL' and 'PROPERTIES'. The 'ADMIN PANEL' includes links for 'General', 'Score Rules', 'Task Templates', 'Triggers', 'Services', 'News Items', 'Snippets' (which is highlighted), and 'Orphaned Emails'. The 'PROPERTIES' section includes links for 'Person', 'Company', 'Company Location', 'Work Log', 'Task', and 'Resource Type'. The main content area is titled 'Create Snippet' and contains a 'Name' text input field and a 'Body' text area. A blue 'Create Snippet' button is located at the bottom of the form.

File Edit View History Bookmarks Tools Help

jobsworth

172.20.50.4:8080/snippets/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]

ADMIN PANEL

- General
- Score Rules
- Task Templates
- Triggers
- Services
- News Items
- Snippets**
- Orphaned Emails

PROPERTIES

- Person
- Company
- Company Location
- Work Log
- Task
- Resource Type

Create Snippet

Name

Body

Create Snippet

FIGURE 2.33: CREATE SNIPPET

2.2.8.8 Orphaned E-Mails

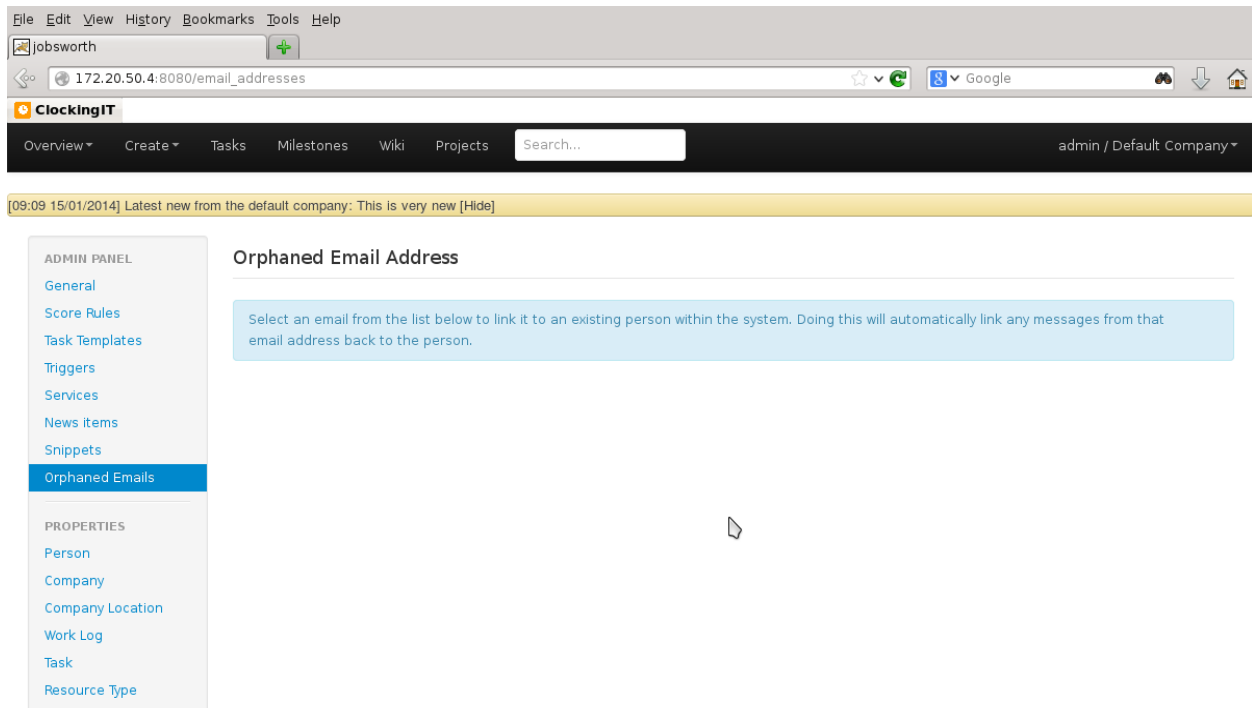


FIGURE 2.34: ORPHANED E-MAILS

2.3 Widgets

2.4 Workflow