# Jobsworth Project Management 4.0

jw40doc.140120

# Jobsworth Project Management 4.0: Installation and Manual
jw40doc.140120

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# Contents

# 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

- acounting / 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) .

**Support**

The primary support is through the mailing list (https://groups.google.com/forum/#!forum/jobsworth) or if you have a bug report, create an issue (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) .

## 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) ↗ 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.



**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 successfull.

File  Edit  View  History  Bookmarks  Tools  Help

Apache Tomcat/7.0.40

172.20.50.4:8080                                                          Google

Home   Documentation   Configuration   Examples   Wiki   Mailing Lists                Find Help

**Apache Tomcat/7.0.40**                          The **Apache Software Foundation**
                                                  h t t p : / / w w w . a p a c h e . o r g /

If you're seeing this, you've successfully installed Tomcat. Congratulations!

Recommended Reading:                                                Server Status
**Security Considerations HOW-TO**
**Manager Application HOW-TO**                                      Manager App
**Clustering/Session Replication HOW-TO**
                                                                    Host Manager

**Developer Quick Start**

Tomcat Setup               Realms & AAA              Examples          Servlet Specifications
First Web Application       JDBC DataSources                           Tomcat Versions

**Managing Tomcat**              **Documentation**              **Getting Help**

For security, access to the manager webapp is   **Tomcat 7.0 Documentation**    **FAQ** and **Mailing Lists**
restricted. Users are defined in:
                                                 **Tomcat 7.0 Configuration**    The following mailing lists are available:
  $CATALINA_HOME/conf/tomcat-users.xml
                                                 **Tomcat Wiki**                 announce@tomcat.apache.org
In Tomcat 7.0 access to the manager                                             **Important announcements, releases, security**
application is split between different users.     Find additional important configuration   **vulnerability notifications. (Low volume).**
Read more...                                      information in:
                                                                                users@tomcat.apache.org
                                                   $CATALINA_HOME/RUNNING.txt    User support and discussion
**Release Notes**
**Changelog**                                     Developers may be interested in:   taglibs-user@tomcat.apache.org
**Migration Guide**                                                             User support and discussion for Apache Taglibs
**Security Notices**                                Tomcat 7.0 Bug Database
                                                    Tomcat 7.0 JavaDocs          dev@tomcat.apache.org
                                                    Tomcat 7.0 SVN Repository    Development mailing list, including commit
                                                                                messages

Other Downloads     Other Documentation     Get Involved        Miscellaneous     Apache Software
                                                                                  Foundation
Tomcat Connectors   Tomcat Connectors       Overview            Contact
Tomcat Native       mod_jk Documentation    SVN Repositories    Legal             Who We Are
Taglibs             Tomcat Native           Mailing Lists       Sponsorship       Heritage
Deployer            Deployer                Wiki                Thanks            Apache Home
                                                                                  Resources

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**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 esploring 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
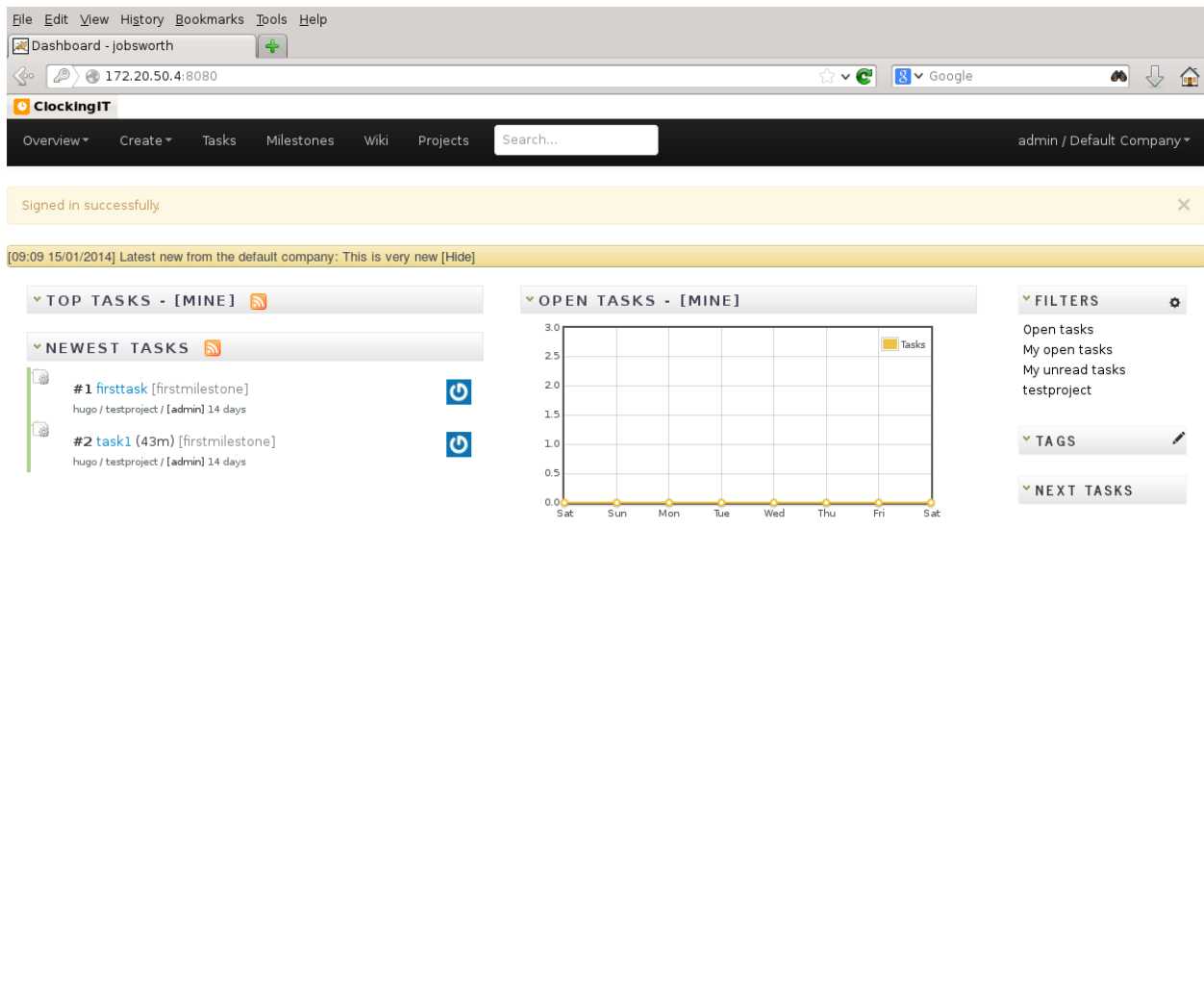


**FIGURE 2.2: DASHBOARD**

### 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.
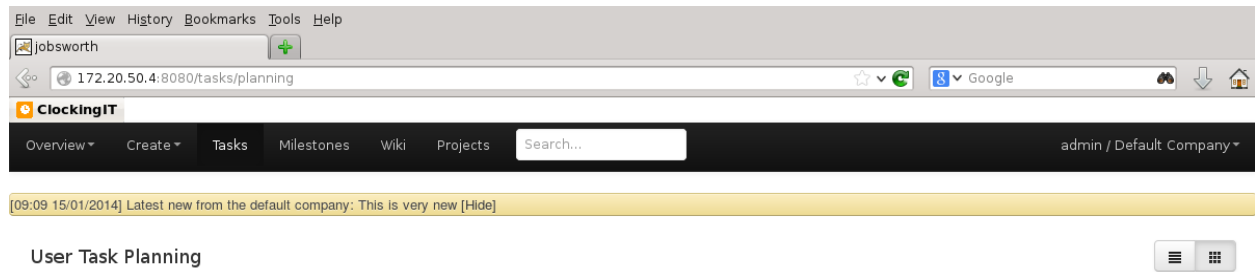


**FIGURE 2.3: PLANNING**

## 2.2.1.3    Billing



FIGURE 2.4: BILLING

## 2.2.1.4    History
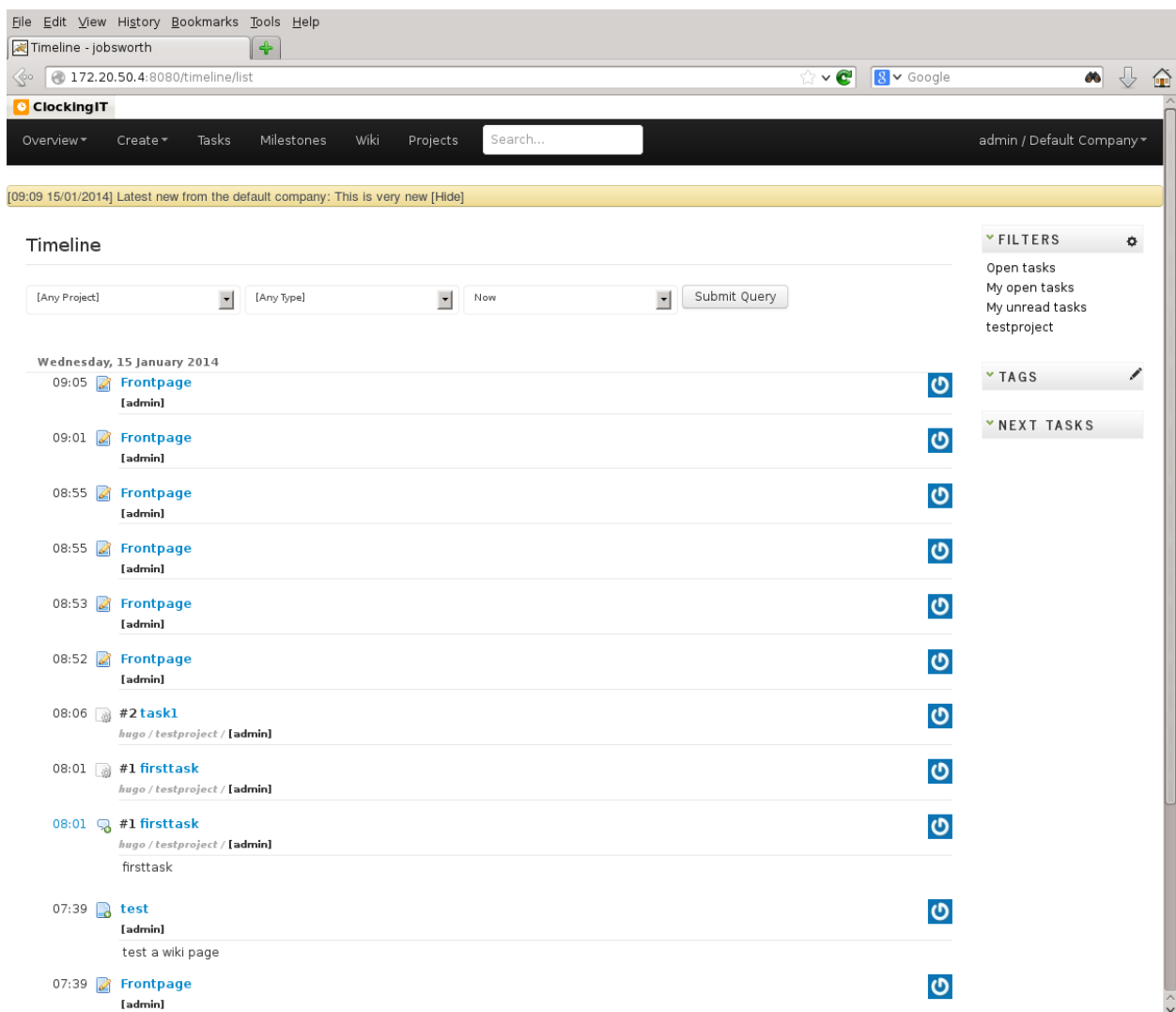


**FIGURE 2.5: HISTORY**

## 2.2.2 Create

## 2.2.2.1 Create Task



**FIGURE 2.6: CREATE TASK**

## 2.2.2.2　Create Project



**FIGURE 2.7: CREATE PROJECT**

## 2.2.2.3   Create Milestone



**FIGURE 2.8: CREATE MILESTONE**

## 2.2.2.4    Create Person



**FIGURE 2.9: CREATE PERSON**

## 2.2.2.5 Create Company



**FIGURE 2.10: CREATE COMPANY**

## 2.2.2.6 Create Resource



**FIGURE 2.11: CREATE RESOURCE**

## 2.2.3   Tasks
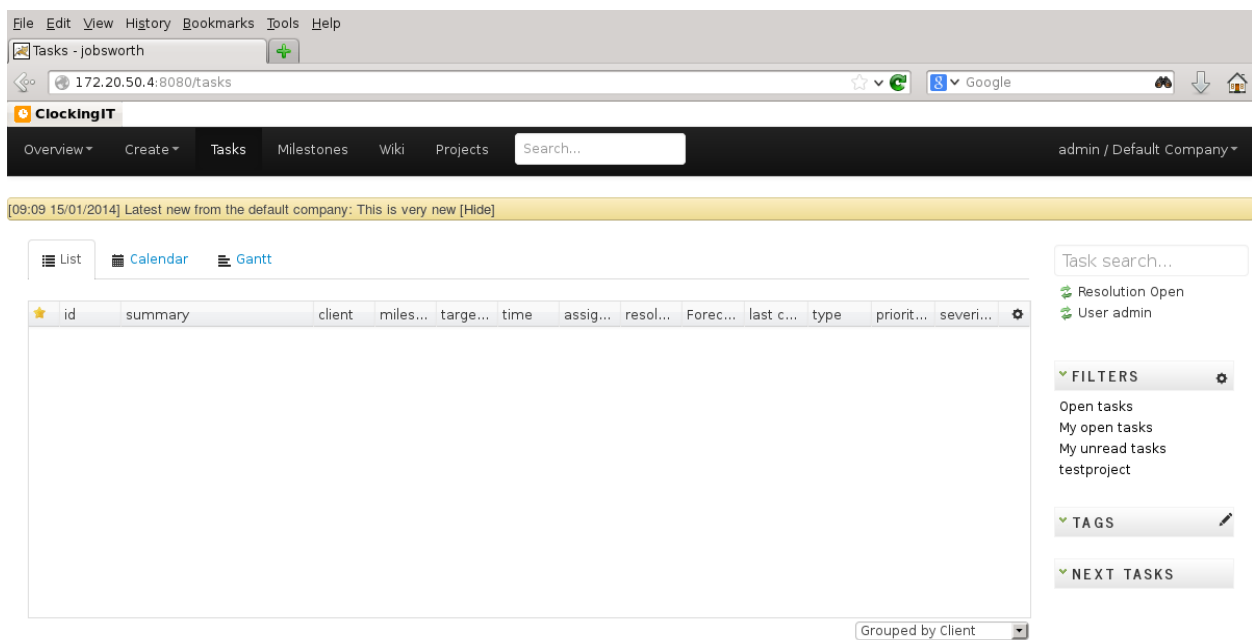


**FIGURE 2.12: TASKS**

## 2.2.4 Milestones
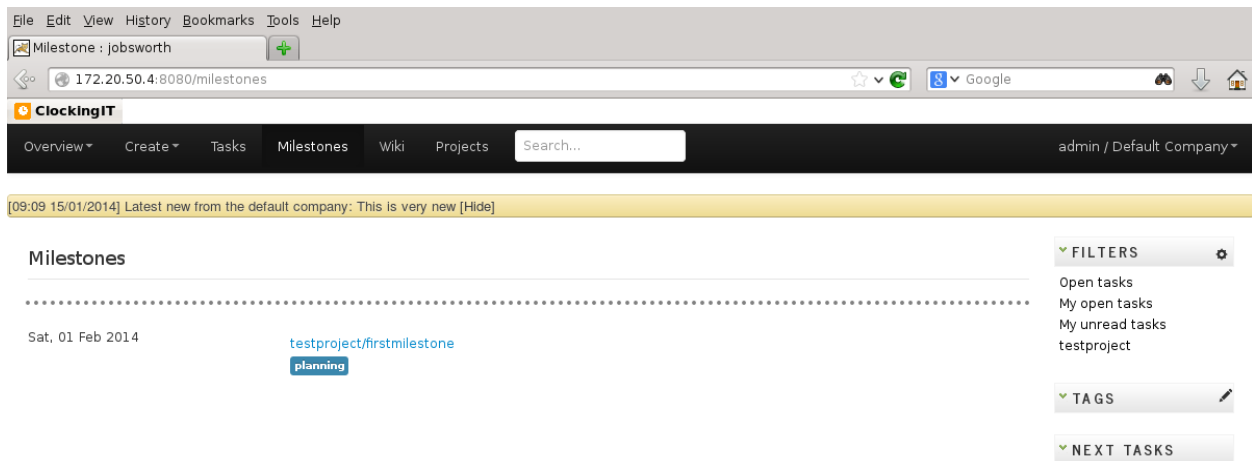


**FIGURE 2.13: MILESTONES**

## 2.2.5    Wiki
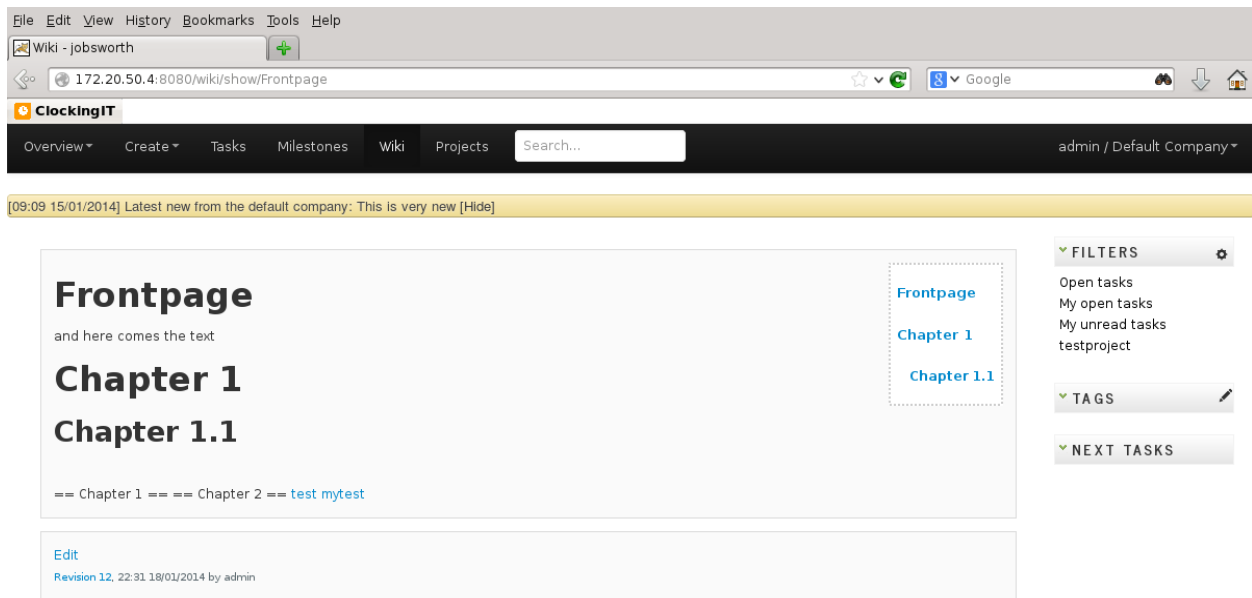


**FIGURE 2.14: WIKI**

## 2.2.6   Projects
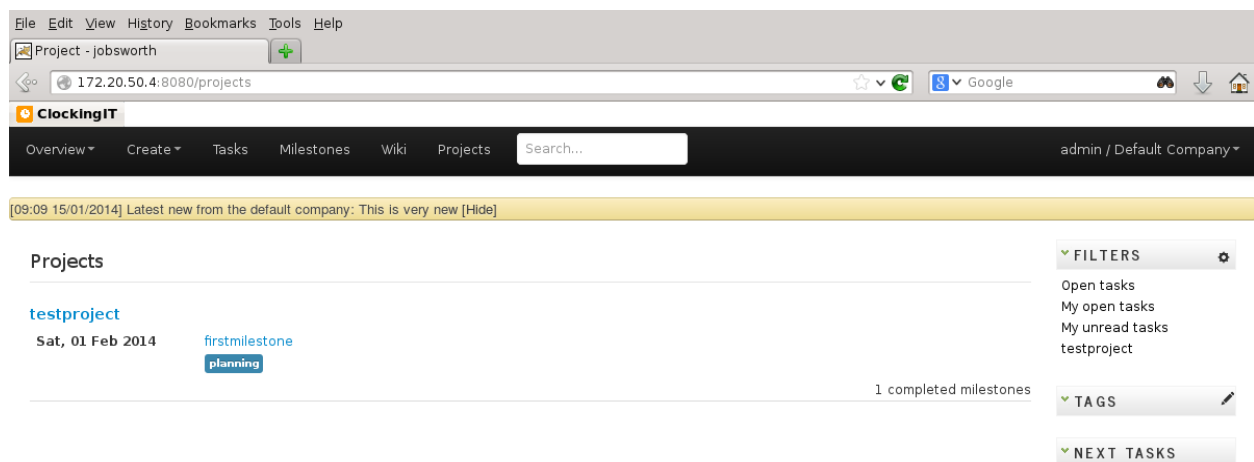


**FIGURE 2.15: PROJECTS**

## 2.2.7   MyAccount

### 2.2.7.1   General



**FIGURE 2.16: GENERAL**

## 2.2.7.2    Access Control



**FIGURE 2.17: ACCESS CONTROL**

## 2.2.7.3    E-Mail Adresses



**FIGURE 2.18: E-MAIL ADRESSES**

## 2.2.7.4     Task Filters



**FIGURE 2.19: TASK FILTERS**

## 2.2.7.5     Projects Permissions



**FIGURE 2.20: PROJECTS PERMISSIONS**

## 2.2.7.6  Work Plan



**FIGURE 2.21: WORK PLAN**

## 2.2.8 Company Admin

### 2.2.8.1 General



**FIGURE 2.22: GENERAL**

## 2.2.8.2    Score Rules
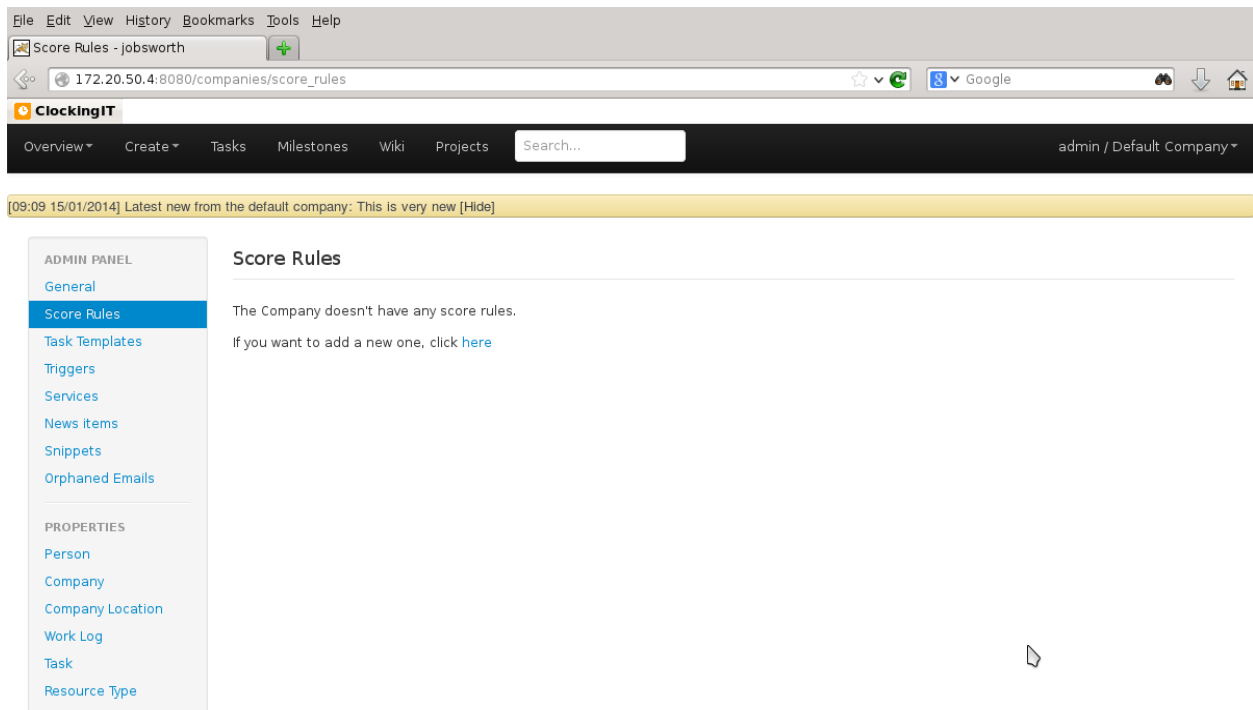


**FIGURE 2.23: SCORE RULES**

## 2.2.8.3 Task Templates
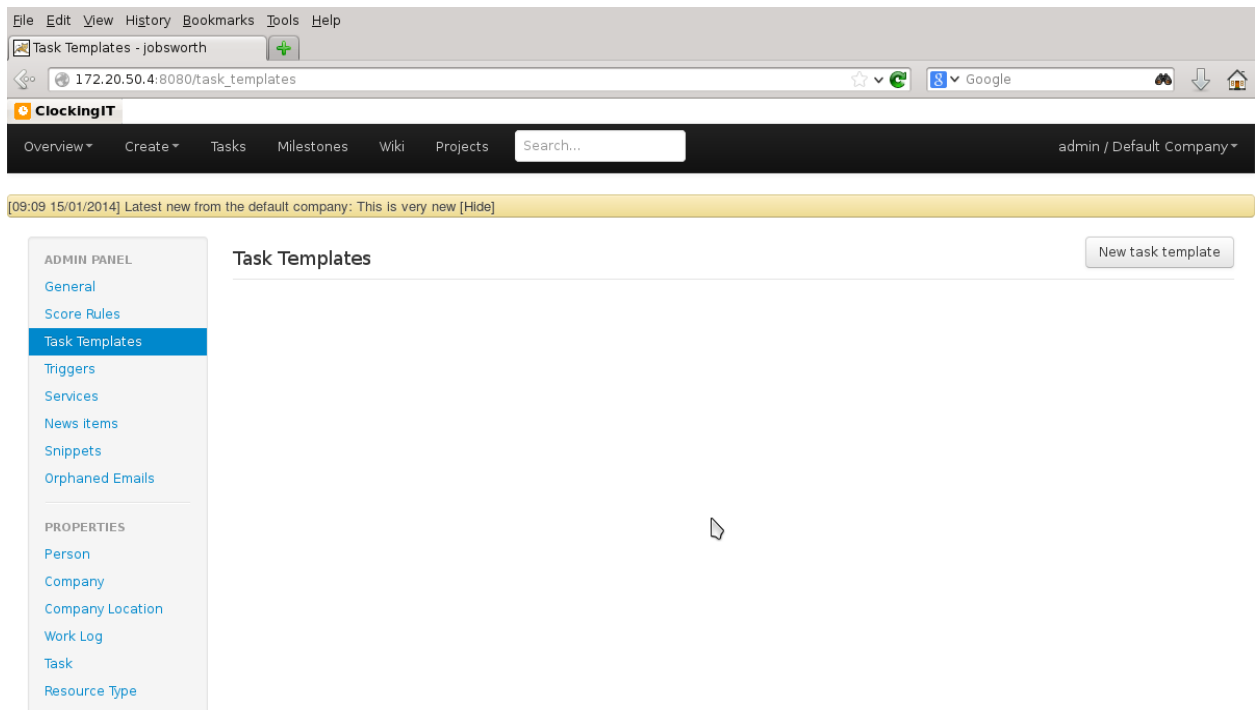


**FIGURE 2.24: TASK TEMPLATES**

**FIGURE 2.25: NEW TASK TEMPLATE**

## 2.2.8.4   Triggers
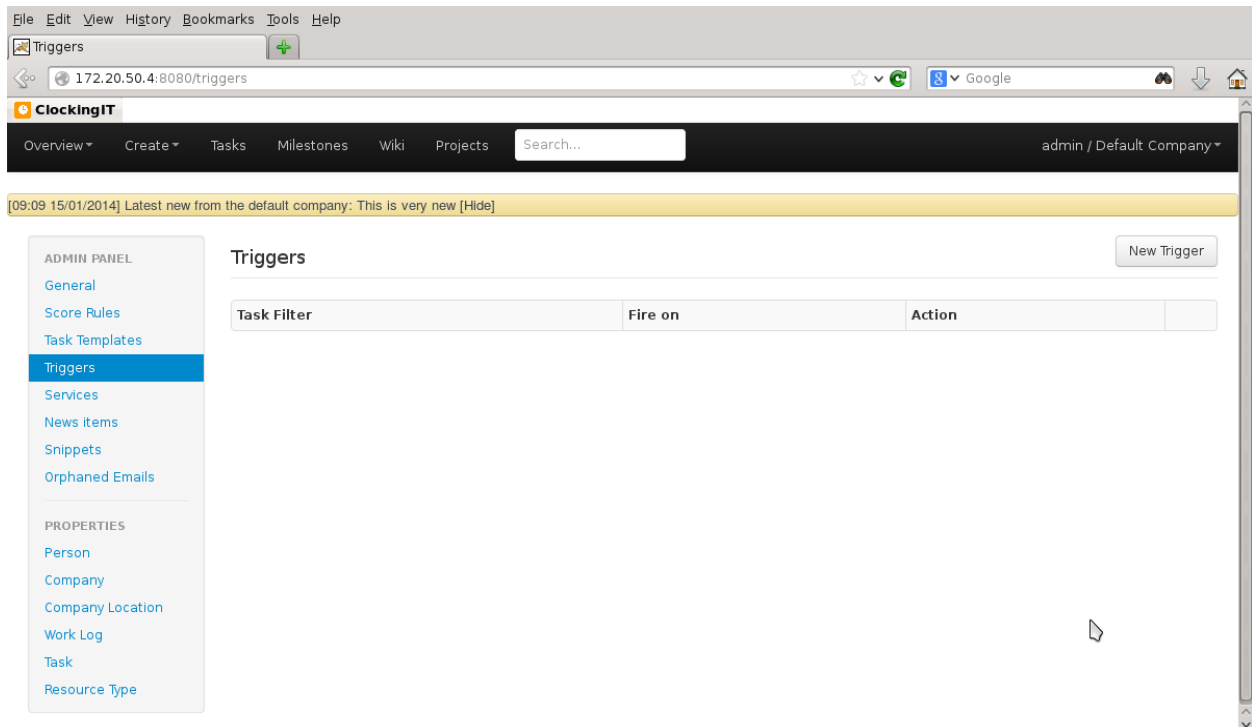


**FIGURE 2.26: TRIGGERS**
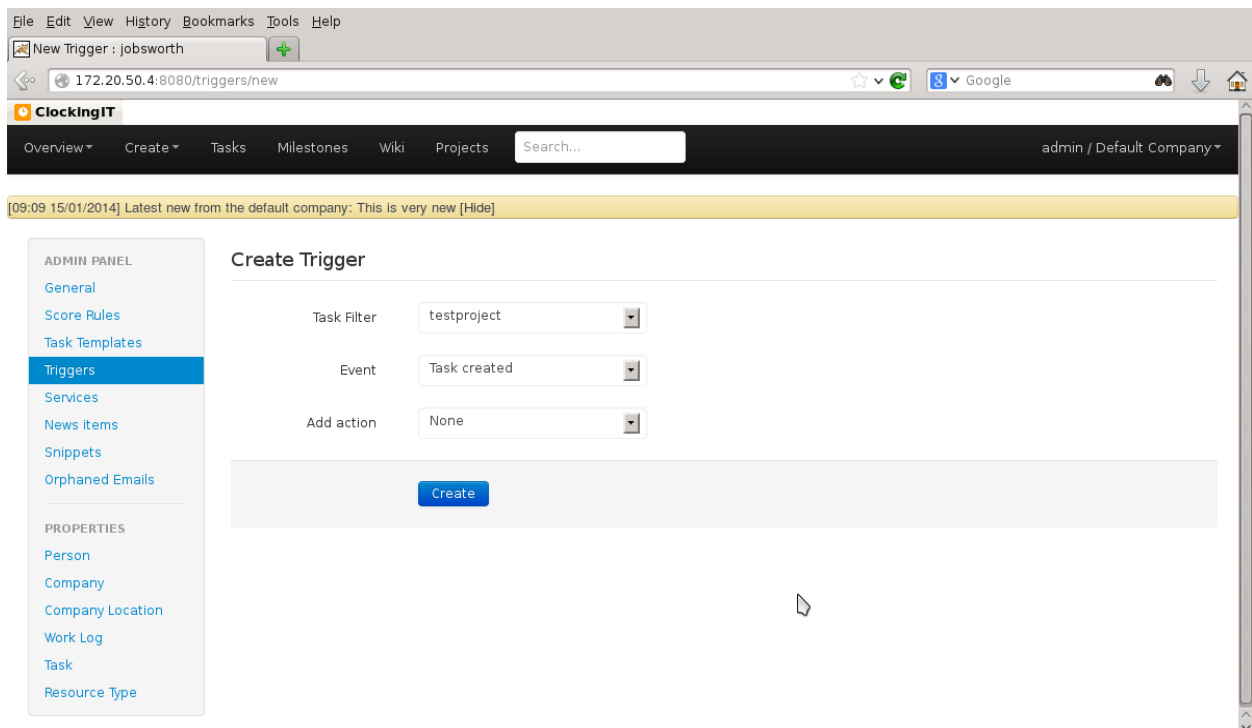


**FIGURE 2.27: NEW TRIGGER**

## 2.2.8.5 Services
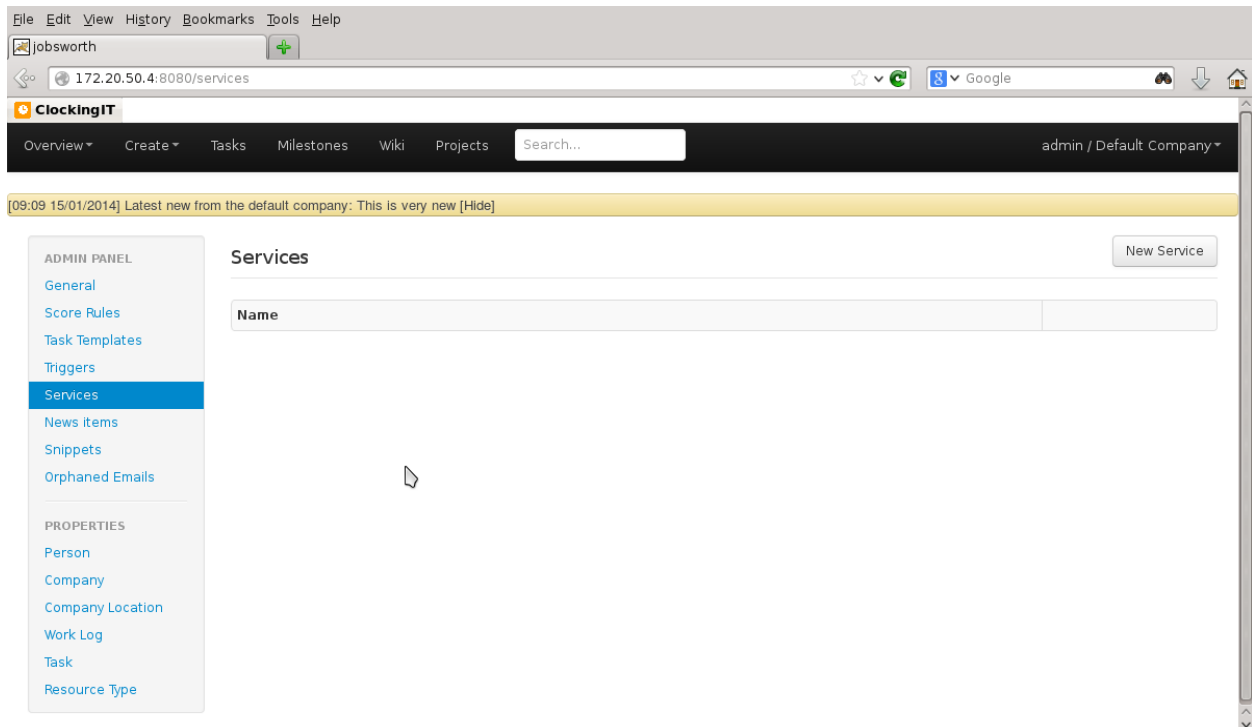


**FIGURE 2.28: SERVICES**
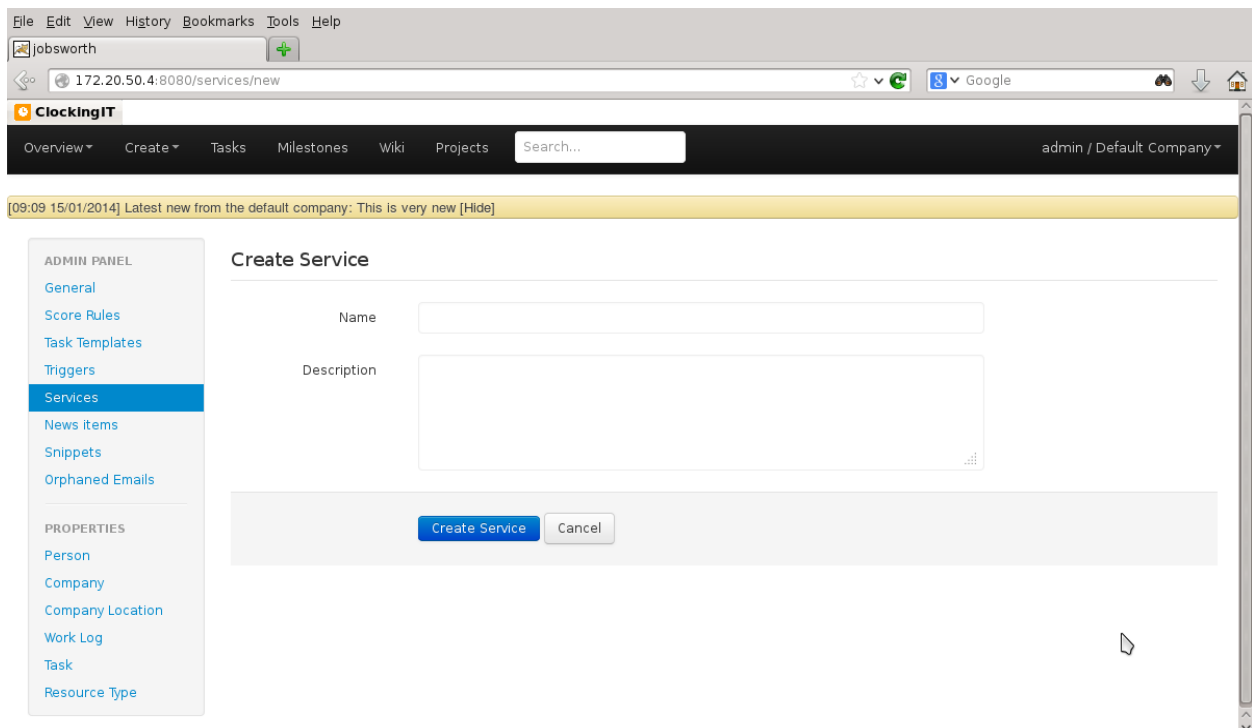


**FIGURE 2.29: NEW SERVICE**

## 2.2.8.6    News Items
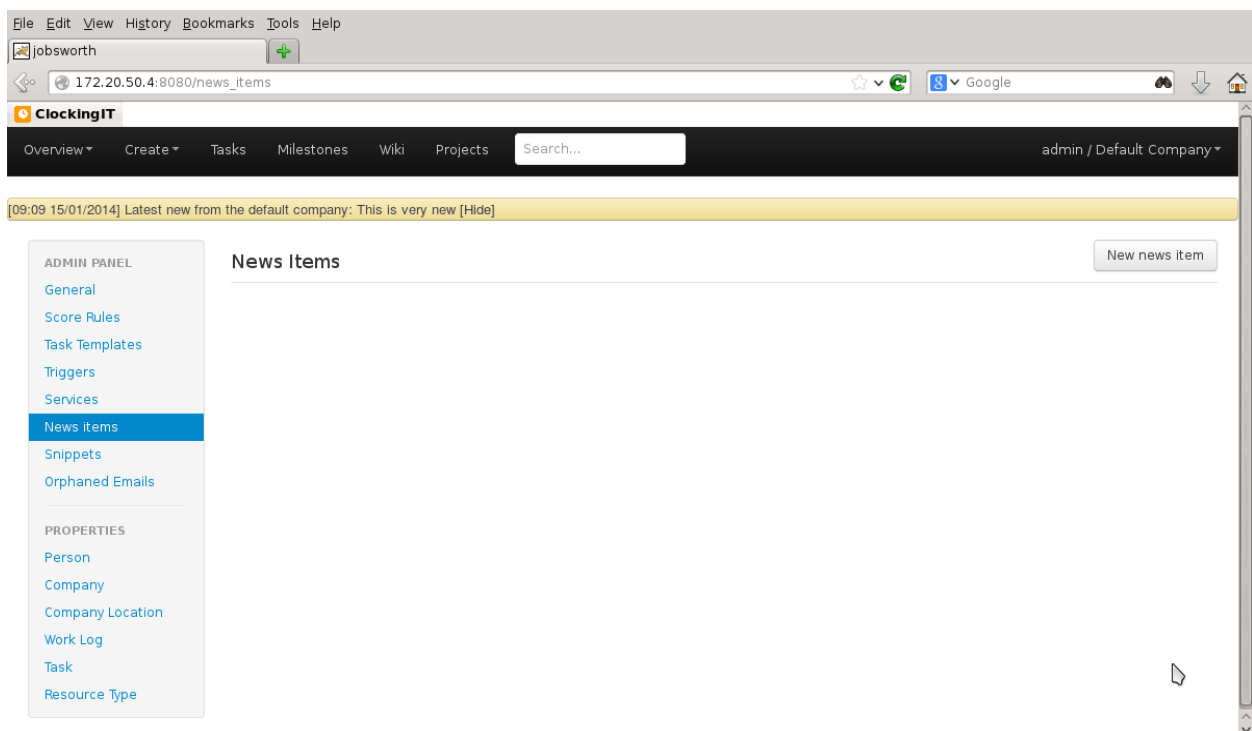


**FIGURE 2.30: NEWS ITEMS**

jobsworth

172.20.50.4:8080/news_items/new

Google

**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**

**FIGURE 2.33: CREATE SNIPPET**

Company Admin

## 2.2.8.8    Orphaned E-Mails
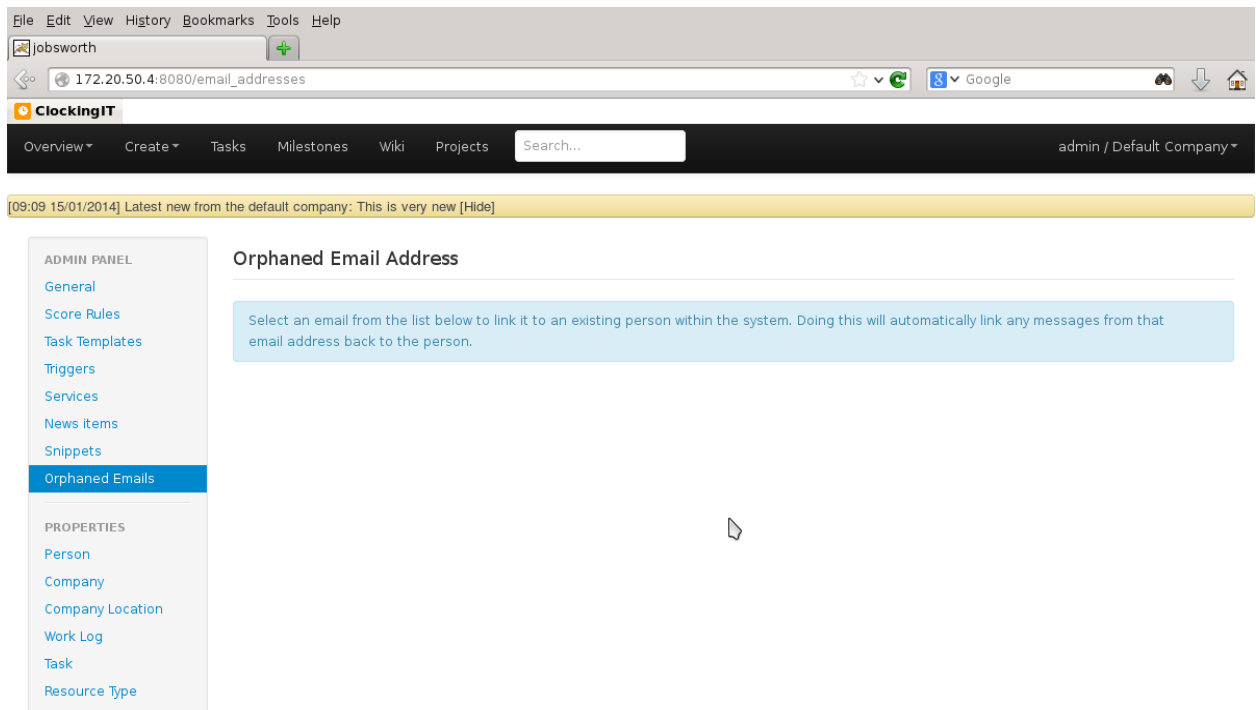


**FIGURE 2.34: ORPHANED E-MAILS**

## 2.2.9    Company Properties

### 2.2.9.1    Person



**FIGURE 2.35: PERSON**

## 2.2.9.2   Company



**FIGURE 2.36: COMPANY**

Company Properties          jw40doc.140120

## 2.2.9.3    Company Location



**FIGURE 2.37: COMPANY LOCATION**

## 2.2.9.4    Work Log



**FIGURE 2.38: WORKLOG**

## 2.2.9.5   Task Properties



**FIGURE 2.39: TASK PROPERTIES**

Company Properties        jw40doc.140120

## 2.2.9.6 Resource Type



**FIGURE 2.40: RESOURCE TYPE**

**FIGURE 2.41: CREATE RESOURCE TYPE**

## 2.3   Widgets

## 2.4   Workflow