

User & Programmer Guide

ticket**Portal**

for



Scott Augé

As of October 14, 2010

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Amduus Information Works, Inc.
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User & Programmer Guide: ticketPortal for dotProject

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Introduction

DotProject is a wonderful freely available web app project management system that is under continual upgrade. Being web oriented in it's interface, it is easy to set up and get users on board by simply installing and configuring at the server followed by an email of a URL on how to reach the application. Being web oriented it is already collaboration software joining in the data and activities of users compared to software individually installed on personal computing devices. However, it is oriented to a user that has access to the entire system.

The purpose of ticketPortal is to present a means of adding and maintaining tickets for the ticket originator with compartmentalized access only to their company tickets.

In addition, ticketPortal integrates at the database table level. That is, it is not a module for use with dotProject but an application on it's own using the dotProject database. This makes it more flexible in running with different versions of dotProject. There is a risk if used with versions very much different from the noted version in the installation instructions as the table may have changed or fields are added. However, if the major numbers are the same, the system should be functional.

Be sure to test before putting into production!

PART I

User Guide

Installation

The software was developed on Mac OS X (a UNIX operating system), however one should not have any problems running the software on a platform meeting the requirements below.

Requirements

Basic requirements include:

- DotProject 2.1.3 or better
- PHP 5.2 or better (default configuration binary)
- MySQL 5.1 or better
- Any operating system supporting the approved version of PHP.
- Any web server supporting the approved version of PHP.

Planning

In Appendix A is a planning worksheet that can be used to plan the values needed.

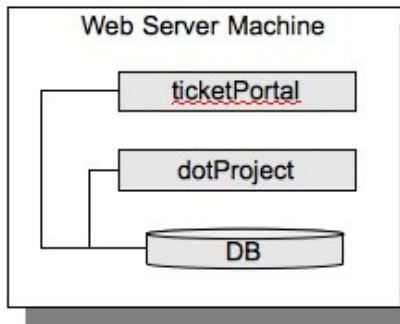
The system has the ability to send feedback from the about page back to a given system for new ideas and problem descriptions. There is a URL needed which will be asked for in

the installation sequence.

The system uses a mysql based database (in particular MySQLi for PHP) – one will need to research the database host, database user name, database user password, and database name.

Possible Architectures

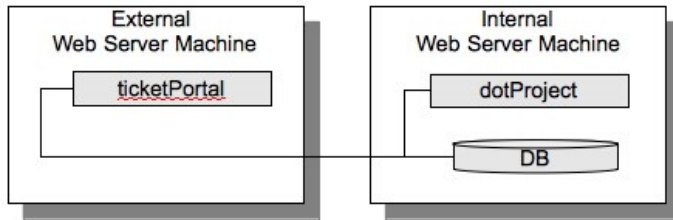
TicketPortal is written in such a way that it need not be on the same machine as dotProject. The idea is that there are circumstances where one wants the ticket producers to see their own tickets, but not have access to dotProject. Also, by having the portal separate from dotProject, the look and feel can be customized for one or multiple installations of the tool. The following are simple explanations for the benefits of certain architectures.



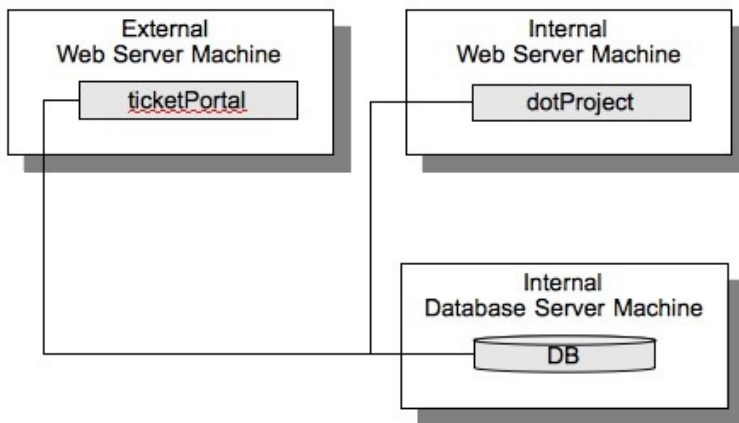
The simplest implementation is with ticketPortal, dotProject, and the database all on one machine. This works best for internal use of the application. Should there be development within a company, but for

different departments of the company, one can present an interface to dotProject with better control of who has access to the dotProject project.

Another option is to have two web server machines. This is good for taking in BETA tickets from an external company that might be testing your application before implementation to



production. The external web server is made available to the internet in general, while the dotProject software and the dotProject database is stored on a more secure internal computer.



Finally there is the configuration where all items are broken out across multiple servers. Should you have a MySQL intensive architecture or arrangement where all databases are on a heavy duty machine for multiple applications, breaking up the components can have distributed application advantages.

Installation

Amduus Information Works, Inc. distributes the program in a zip file named as:

`azuir.yyyyjjjhhmmss.zip`

Where *yyyy* is the year;

Where *jjj* is the day of year;

Where *hhmmss* is the hour, minute, and second of year.

This number is the BUILD number. The larger the number, the newer the build.

The zip includes the following directory structure:

<code>/azuir</code>	Base directory containing the programming code.
<code>/azuir/doc</code>	Location where documentation is stored. Optional directory on production.
<code>/azuir/install</code>	Location where a simplified set up program can be found. You should remove this directory from production once set up has been achieved.

Install with the following steps:

1. Fill out the worksheet in Appendix A to plan your installation.

2. Unzip the file into the physical directory for your web server.
3. Edit `clsConfig.php` with your database connection parameters.
4. Optionally remove the `/azuir/doc` directory.
5. Proceed with ticketPortal user creation on dotProject.

Processes

General Process For Tickets

Tickets are used to:

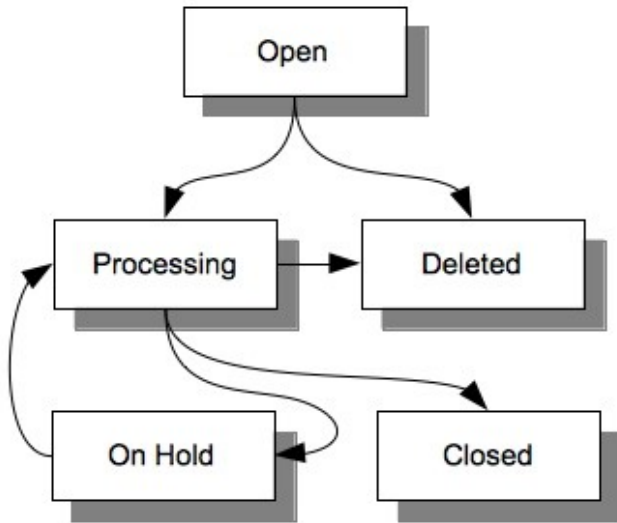
- Communicate a problem to the organization;
- Inform the ticket creator what is happening in regard to the ticket;
- Help the organization track problems that have been identified as part of a project or software package.

Ticket Status

Tickets can have the following statuses:

Open	The ticket has just been opened and is ready for review.
Processing	The ticket is currently being reviewed or worked on by the company.
On Hold	The ticket has been deemed a lower priority and is currently not being worked on.
Closed	The problem described by the ticket has been made a task on a project.
Deleted	The ticket was deemed not really a problem and removed from the queue.

Often tickets will follow this flow of status changes:



When tickets are created, they are set to an **open** status. Under this status, a dispatcher should take statistics to how many tickets are opened in a day and assign the ticket to the appropriate person.

The assigned person will change the ticket to **processing** and attempt to repeat the problem or review the conditions the ticket is speaking of. If the user cannot repeat the problem or has an explanation detailing the condition as normal, then they should set the ticket to **deleted**.

If the assigned person does see a problem, they should keep the ticket under **processing**.

If the assigned person is too busy to deal with the ticket, the

ticket should be set to **on hold**.

Should the ticket have a problem that is solved or made into a task on a project, then the ticket should be changed to **closed**.

Ticket Priority

Tickets can have the following priorities:

Low	The ticket contains a nuisance or a wish list item.
Normal	The ticket contains a problem that effects a specific part of the project.
High	The ticket contains a problem that will hold up a specific part of a project.
Highest	The ticket contains a problem that will hold up a major portion of the project.
911	The ticket contains a problem that brings the project to a halt.

Ticket Data

Adding A New User

To add a user, one creates the user under dotProject. The user can be of any type as ticketPortal does not use dotProject security mechanisms.

Be sure to let the user know what their user login and password is.



In the future, there is a planned feature to require the user to change their password upon first login.



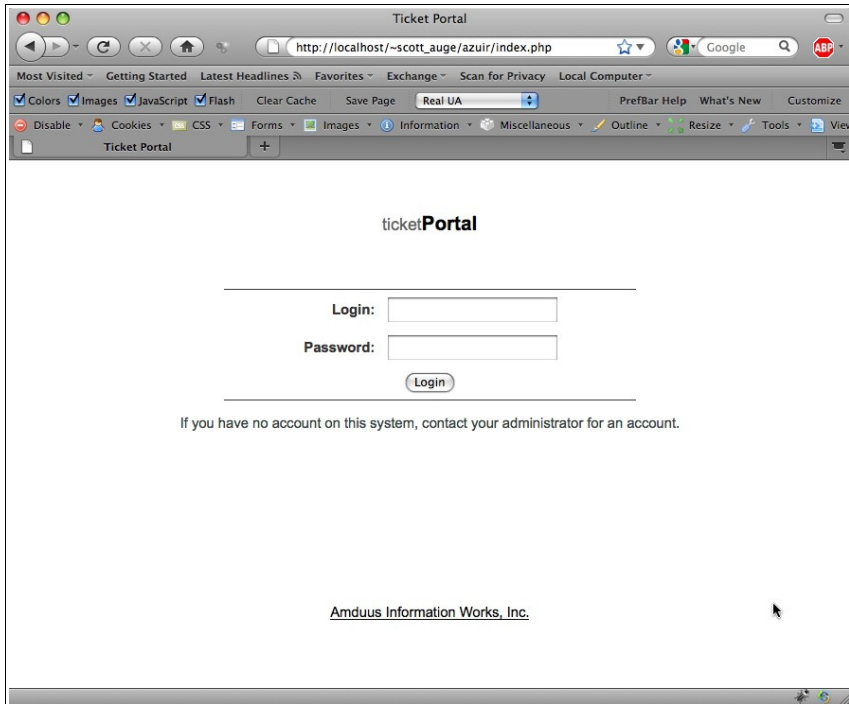
In the future, there is a planned feature allowing the user to reset their password by a message to their email account.

Disabling A User

To disable a user, change the password for that user in dotProject. The user will no longer be able to login with their known information.

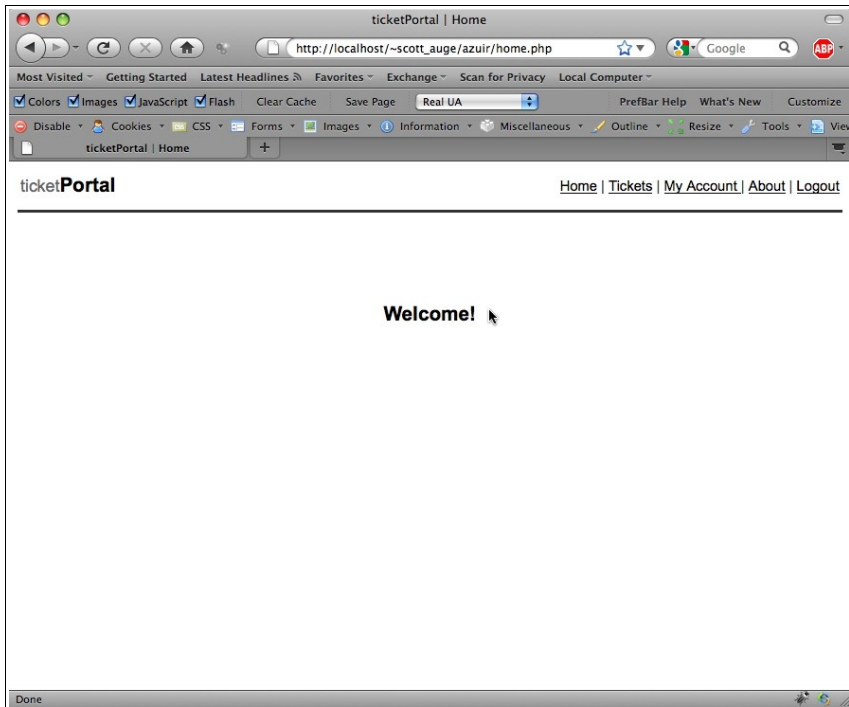
Logging In

Once the ticket user has a user account, they can go to the published URL to find ticketPortal at and login by entering their credentials.



Should they have a problem with their credentials, a message will appear telling them as much. At this point the user should go back to the administrator who told them what their login and password is for trouble shooting in dotProject.

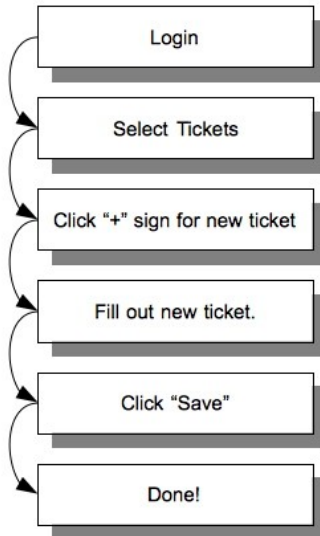
Should the user be allowed into the system, they will be presented with a Welcome page along with a menu of functionality.



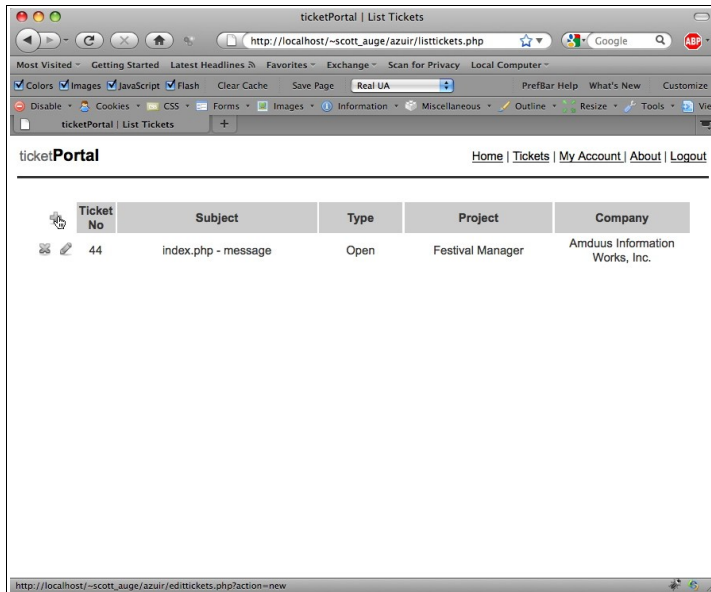
In the future, there is a planned feature making the welcome page a dashboard with direct links to lists of tickets of a given status.

Adding A Ticket

Adding a ticket is very simple. Once the user has been created in dotProject.



Screen by screen one creates a ticket by clicking on the “Tickets” menu item. It will bring up a list of the existing tickets. To the upper left corner there is a “+” sign that one clicks on to create the ticket.



The ticket input page will appear. Set the appropriate data and then click “Save.” There is also the option to add additional information as a note though this is often used in ticket updates.

ticketPortal | Edit Ticket

http://localhost/~scott_auge/azulr/edittickets.php?action=new

ticketPortal | Edit Ticket

Home | Tickets | My Account | About | Logout

Ticket Information

Ticket No: 45

Subject: home.php - add links to list of tickets

Project:

Company:

Status: Open

Priority: Low

Ticket Description:

Add links to lists of tickets based on their status.

Save

New Ticket Created

Notes:

New Note:

Save

Done

Either “Save” button will perform the same action – they are present for aiding in screen navigation on long tickets.

Once “Save” has been clicked, one will see the ticket input screen with the message “Ticket Updated.”

ticketPortal | Edit Ticket

http://localhost/~scott_auge/azulr/edittickets.php?action=new

Most Visited - Getting Started - Latest Headlines - Favorites - Exchange - Scan for Privacy - Local Computer -

Colors Images JavaScript Flash Clear Cache Save Page Real UA PrefBar Help What's New Customize

Disable Cookies CSS Forms Images Information Miscellaneous Outline Resize Tools View Source

ticketPortal | Edit Ticket

ticketPortal Home Tickets My Account About Logout

Ticket Information

Ticket No: 45

Subject: home.php - add links to list of tickets

Project:

Company:

Status: Open

Priority: Low

Ticket Description:

Add links to lists of tickets based on their status.

Save

Ticket Updated

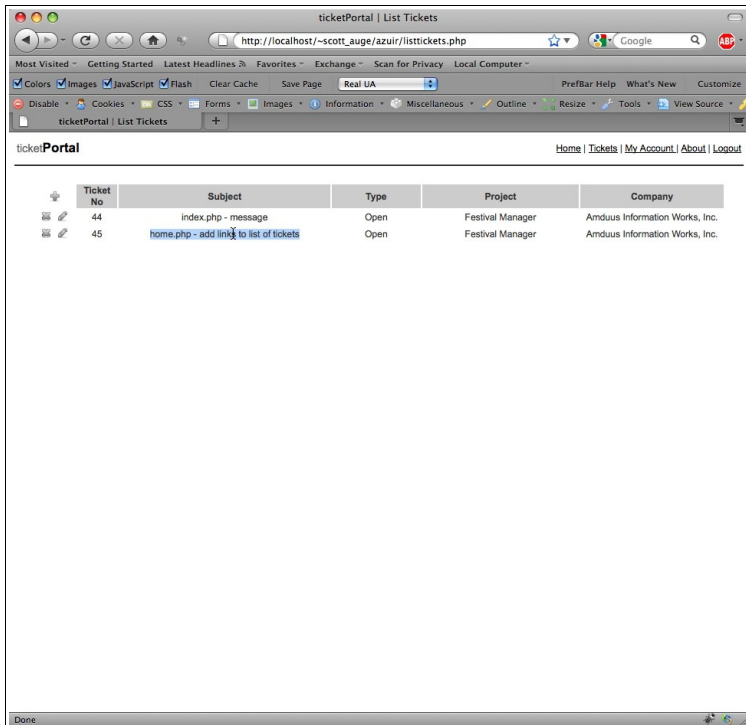
Notes:

New Note:

Save

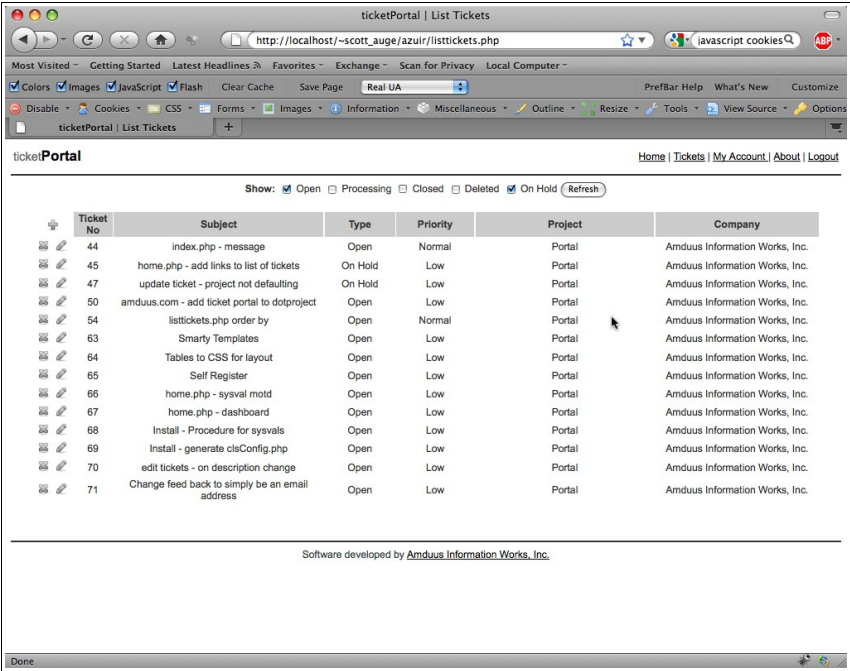
To leave the ticket, simply go to another menu item.

By clicking on the “Ticket” menu item, we can see the new ticket has been added.



Listing Tickets

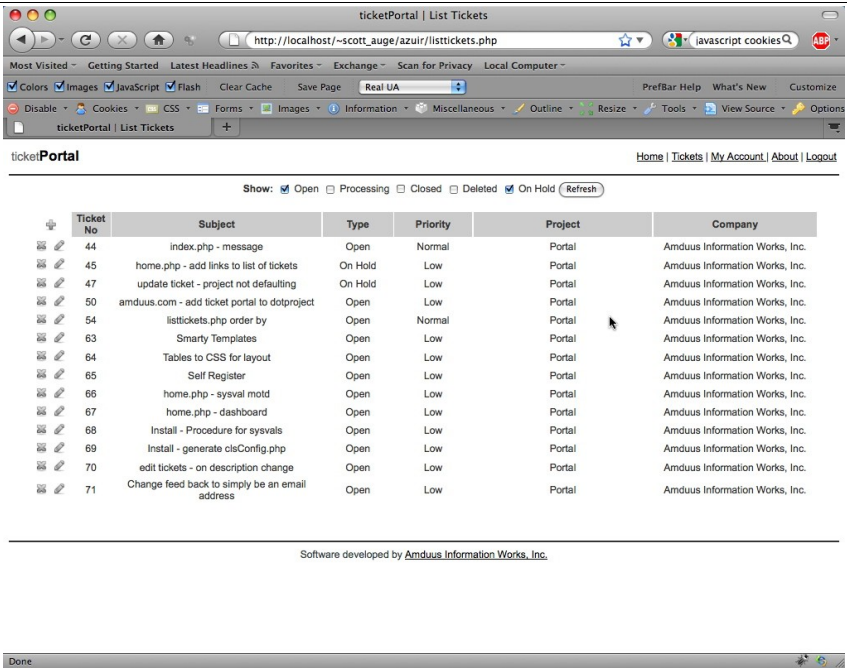
To get a listing of the tickets associated with the company of the user, simply click on the “Ticket” menu item.



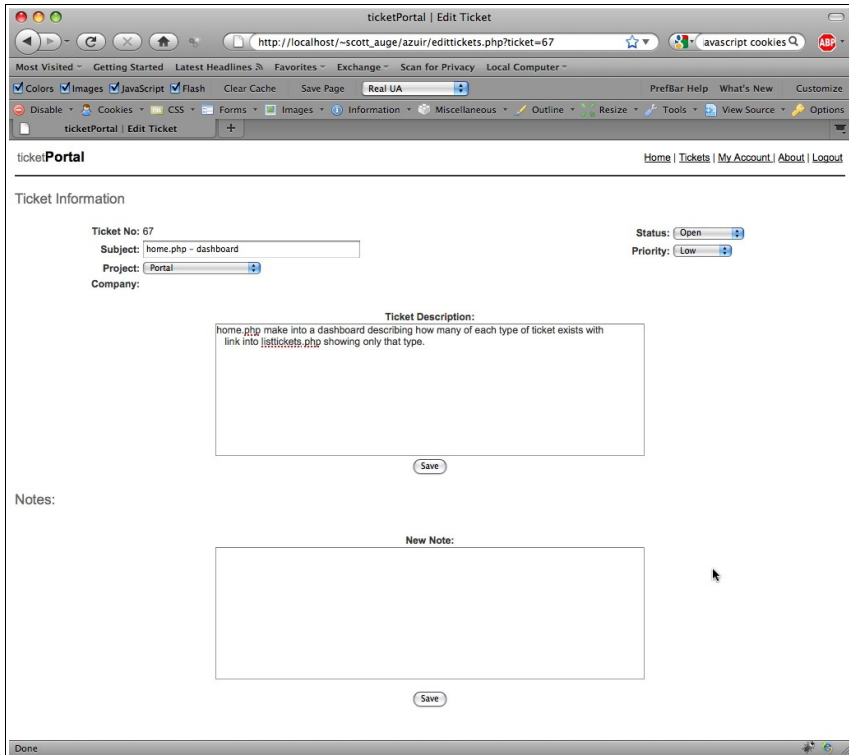
If the user has no company assigned, they will see ALL the tickets on the system.

Updating Tickets

To update a ticket, one should find the ticket on the ticket listing page and click the pencil icon.



Upon clicking the user will be brought to the ticket editing screen.

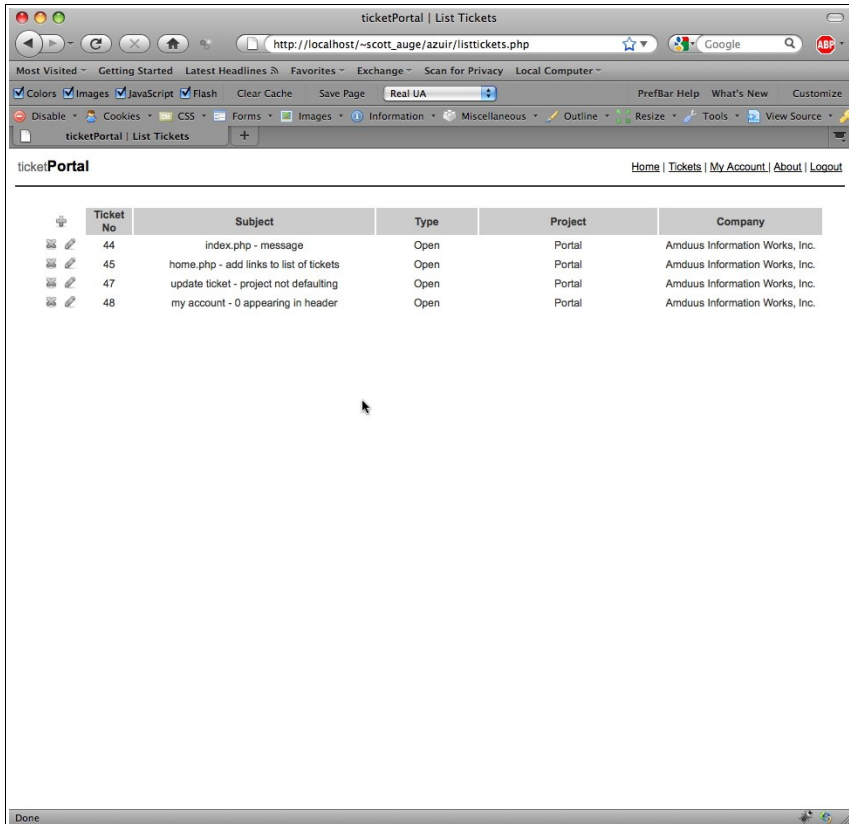


Change settings as needed or add a new note to the ticket and press the “Save” button. (Either save button will work – they are simply there for aiding in navigation.)

The user should see “Ticket Updated” on the screen under the description and the user can freely continue updating or moving onto another ticket.

Deleting Tickets

There are two ways to delete a ticket. One is a hard delete which will completely remove the ticket record and notes from the system.



This is achieved by clicking on the “X” next to the ticket number. Some implementers may choose to have this set the status to “Deleted.”

Another means of deleting the ticket is a soft delete and is the recommended manner of deletion. To do so, simply update the ticket, choose “Deleted” from the status drop down, and click “Save.”

ticketPortal | Edit Ticket

http://localhost/~scott_auge/azuir/edittickets.php?ticket=48

ticketPortal | Edit Ticket

Home | Tickets | My Account | About | Logout

Ticket Information

Ticket No: 48

Subject: my account - 0 appearing in header

Project: Portal

Company:

Status: Open

Priority: Open, Processing, Closed, Deleted, On Hold

Ticket Description:

There is a debugging message throwing a value in the header area of the my account page.

Save

Notes:

New Note:

Save

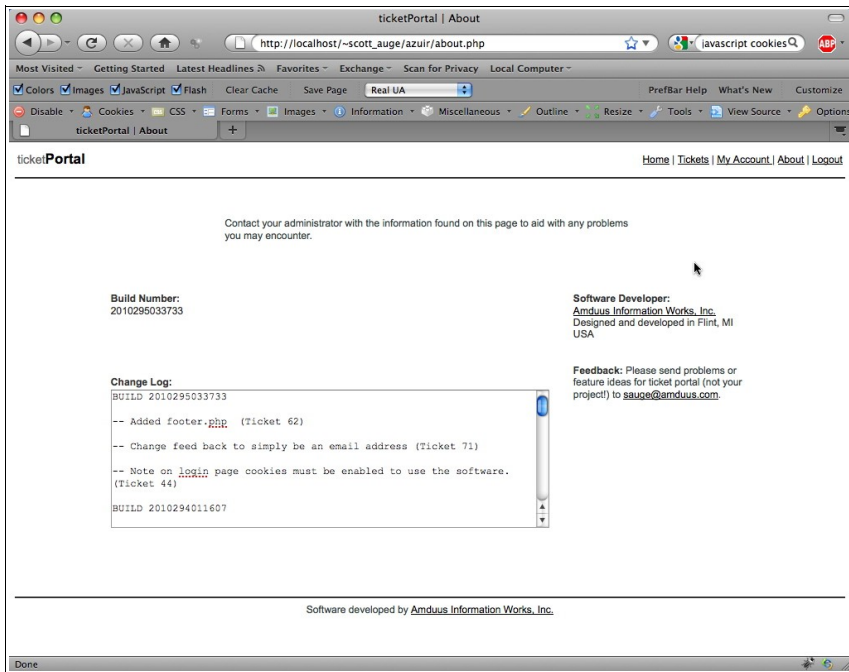
Done



One will likely want to delete tickets by the drop down instead of by the X icon on the listing page.

About

The about page details the build number that the software is at, a list of changes that are in that build, who is responsible for the build, as well a feedback email to aid in sending change ideas to the software developer.



In the future, feedback will likely include instructions to create an account on our ticketPortal and add tickets for feedback.



Do not send project questions to the developer – these are the domain of your ticketPortal implementor!

My Account

This page identifies information associated with your account that can be changed.

The screenshot shows a web browser window with the address bar displaying `http://localhost/~scott_auge/azuir/myaccount.php`. The browser's toolbar includes various icons and a search bar. The page content is organized into four main sections:

- Account Information:** Contains fields for 'Login Name' (pre-filled with 'saug'), 'Password', and 'Verify Password'.
- Personal Information:** Contains fields for 'First Name' (pre-filled with 'Scott'), 'Last Name' (pre-filled with 'Auge'), 'Email One' (pre-filled with 'saug@amduus.com'), 'Email Two' (pre-filled with 'scott_auge@sc.com'), 'Phone One', 'Phone Two', and 'Mobile'.
- Address Information:** Contains fields for 'Address One' (pre-filled with '12 main'), 'Address Two', 'City' (pre-filled with 'Flint'), 'State' (pre-filled with 'MI'), and 'Zip' (pre-filled with '48507').
- Company Information:** Contains fields for 'Company' and 'Job Title' (pre-filled with 'Developer').

An 'Update Your Information' button is located at the bottom center of the form area. The browser's status bar at the bottom shows 'Done'.

To change your password, enter values in both the fields.

If you do not include values in the password fields but do click “Update Your Information” your password will remain as before.

PART II

Programmers Guide

Programming Notes

File Naming Convention

cls*.php	Contains object oriented class definitions.
fnc*.php	Contains procedurally oriented programming function definitions.
No prefix.	Page rendering oriented code.

Table Classes

Each table used and manipulated by the software uses it's own class for CRUD operations. They are named `clsTablename.php`. These classes often start out as generated code but often have manual updates performed on them for additional functionality.

The classes will have public attributes available and named by each field found in the table. In general one will create or find a record, adjust the attributes and then call the `Update()` function. For deleting, use one of the `FindBy*()` functions and then `Delete()`.

The classes are designed to act as a record buffer of sorts. They do not `select ... for update` and if such functionality

is needed, one should write a `Lock()` method.

Example for creating:

```
$Company = new clsCompanies(new clsDB());  
$Company->Create(); // New record made here  
$Company->company_name = "ABC"; // "Dirty Buffer"  
$Company->Update(); // Changes committed here
```

Example for finding:

```
$Company = new clsCompanies (new clsDB());  
$Company->FindByID($_REQUEST["CompanyID"]);  
echo $Company->company_name;
```

Example for deleting:

```
$Company = new clsCompanies (new clsDB());  
$Company->FindByID($_REQUEST["CompanyID"]);  
$Company->Delete();
```

Cookies And Security

There is a session cookie that stores a random string of letters and numbers in AZUIR. This value directly keys to a sessions table entry via `sessions.session_id`. Within the data portion of this table is an array with the following values (often initialized in `clsSecurity:PerformLogin()`).

The `clsSecurity.php` class contains the session data in `clsSecurity:Data["n"]` where *n* is one of the following values found under "key":

Key Name	Purpose
user_userlogin	users.user_username
user_id	users.user_id
user_company	Users.user_company

There may be values added in different parts of the code (not as of this current writing.)

To add your own session values

Simply add another element to the `clsSecurity:Data[“”]` array and then call `clsSecurity:SaveSessionData()`.

```
...
$Security->Data["MyValue"] = "My Data";
$Security->SaveSessionData();
...
```

Upon calling `SaveSessionData()`, your value will be available on the next page hit.

Adding security to a page

There is a special include that will send the user back to the `index.php` page should they not be logged in. Include it before any logic and the `<body>` tag to prevent non-logged-in access to

the page. An example use is in bold:

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0
Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-
transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="Content-Type" content="text/html;
charset=ISO-8859-1" />
<title>ticketPortal | My Account</title>
<link href="styles.css" rel="stylesheet"
type="text/css" />
</head>
```

```
<?php include_once ("requireslogin.php") ?>
```

```
<?php
include_once("clsUser.php");
include_once ("clsDB.php");
include_once ("clsContacts.php");
include_once ("fncShowSessData.php");
include_once ("clsCompanies.php");
```

Other Files

TODO

A list of desirable activities until we get a (irony) ticket system up and running.

CHANGELOG

List of changes that went into each build of the system.

Appendix A – Planning Worksheet

Database:

Host:	
User:	
Password:	
Host:	

SysVals:

FeedbackUrl:

Defaults to <http://www.amduus.com/azuir/feedback.php>

Web Server:

Installation Directory:

Appendix B – Other Options

There is another ticket generating module available for use called HelpDesk which can be downloaded at:

<http://www.linuxbox.com/tiki/tiki-index.php?page=dP-HelpDesk>

There is a book about dotProject that can be ordered at:

http://www.amazon.com/Project-Management-dotProject-Installation-administering/dp/1847191649/ref=sr_1_1?ie=UTF8&qid=1287328653&sr=8-1

Appendix C – GPL 2 License

[illegible]

ticketPortal
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