

ProjectPier v0.8.8

Getting Started Guide



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Overview

ProjectPier is a Free, Open-Source, PHP application for managing tasks, projects, and teams through an intuitive web interface. ProjectPier will help your organization communicate, collaborate and get things done. Its function is similar to commercial groupware/project management products, but allows the freedom and scalability of self-hosting. ProjectPier is software that you download and install on your own web server, which requires specialized knowledge. The purpose of this document is to help you install and configure a new instance of ProjectPier.

License

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Attribution – You must include a reference to <http://www.projectpier.org/attribution>

Share Alike - If you alter, transform, or build upon this work, you may distribute the resulting work only under the same or similar license to this one.

Contribution – If you would like to contribute changes or additions to this manual, please refer to <http://www.projectpier.org/manual/contribute> for instructions.

Installation

Who should perform the installation?

Installing ProjectPier requires an understanding of how to install PHP/MySQL based software applications. If you have installed other PHP/MySQL software applications (example: Wordpress or Joomla) you will find the instructions below easy to follow. If you have never installed a PHP/MySQL application but are familiar with how basic linux web hosting accounts work (for example you have used C-Panel based web hosting) then you should be able to understand the instruction and successfully install ProjectPier on your server. If most of this paragraph has not been understandable, then you should probably not attempt to perform the installation yourself. In this case you may want to consider contacting your Information Technology department for help, or purchasing a web hosting package with and automated ProjectPier installer.

Requirements

To install ProjectPier you need a web server that meets the following requirements

- Apache HTTP web server 2.0 or greater
- PHP 5.2 or 5.3 ([MySQL](#), [GD](#) and [SimpleXML](#) extensions are required)
- MySQL 4.1 or greater **with InnoDB support**
- Please note that you cannot use ProjectPier with PHP 4. Please contact your provider if and how you have to configure your settings to use PHP 5.

Enabling InnoDB Support

Some installations of MySQL don't support InnoDB by default. The ProjectPier installer will tell you if your server is not configured to support InnoDB. This is easy to fix on a dedicated server or virtual server if you have root access. If you are attempting to use a shared web hosting account you probably don't have access to the files required. In that case contact your hosting provider.

1. Open your MySQL options file, the file name is my.cnf (Linux) - usually at /etc/my.cnf
or my.ini (Windows) - usually at c:/windows/my.ini. If you are using the Uniform Server on Windows, the file will be named 'my-small' and will need to be edited with a unix compatible editor such as Notepad++ or PSPad.
2. Comment the skip-innodb line by adding # in front of it (like #skip-innodb).
3. It would also be good to increase max_allowed_packet to ensure that you will be able to upload files larger than 1MB. Just add this line below #skip-innodb line:

```
set-variable = max_allowed_packet=64M
```

Alternatively, just install without InnoDB support. The installer will allow you.

Download ProjectPier

Download ProjectPier from the Projects page (<http://www.projectpier.org/project/ProjectPier>). You can also download your language and themes from that page.

If you have shell access to your server and want to download directly to your server use the following command. First, ensure you are in your web hosting home directory, then type:

wget <http://www.projectpier.org/files/pp088.zip>

Unzip the file using the command:

```
unzip pp088.zip
```

If you wish, you may rename the directory (defaults to pp088) or move the files up to the home directory.

Installing ProjectPier 0.8.8

Unzip the file pp088.zip to a temporary location on your hard drive. Using an FTP client software application such as FileZilla (<http://filezilla-project.org/>), transfer the files to your web hosting home directory. If you prefer that ProjectPier be installed in a subdirectory (example: /projectpier or /projects), first create the subdirectory on your server, then upload the files there. If you have downloaded the files directly to your server using wget (as described above) then this is not necessary. Regardless of how you have accomplished the task of placing the files on your server, continue with the steps below.

- ProjectPier will need to write to certain files on your file system as outlined in the two sub-items below. On Windows systems there is generally no special settings required. On *nix systems file permissions will need to be set accordingly. **Taking these steps in advance is optional**; the installer will let you know if it needs write access to a file or directory to which it does not have proper access at the time the installer is run.
 - Locate the following directories and change the permissions such that they are writable by the web server (755 will work on most *nix systems):
 - /public/files
 - /cache
 - /upload
 - /config
 - /tmp
 - Locate the following files and change the permissions such that they are writable by the web server (644 will work on most *nix systems):
 - /cache/autoloader.php
 - /cache/log.php
- Log into your MySQL database management tool through your preferred method (example: phpMyAdmin) and create a new database and a new username and password for that database. Write these down, the ProjectPier installer will ask you to enter this information. Alternatively, the ProjectPier installer can create the database for you, but you will still need to know a MySQL username and password with appropriate permissions to create a new database.

- Run the ProjectPier installer. To do this, in your browser navigate to the "/public/install" URL. For example, if you uploaded the ProjectPier installation files to a subdirectory named "projectpier" in your web hosting home directory, then navigate to "http://www.domain.com/projectpier/public/install".
- Follow the installer's instructions.

Install Service Pack 1

Download Service Pack 1 from: <http://www.projectpier.org/files/pp088sp1.zip>

Unzip the files to a temporary location on your hard drive. Using an FTP client software application transfer the files to your web server at the root of your ProjectPier's installation directory. Note: this will overwrite some existing files with newer versions.

Install Service Pack 2

Download Service Pack 2 from: <http://www.projectpier.org/files/pp088sp2.zip>

Unzip the files to a temporary location on your hard drive. Using an FTP client software application transfer the files to your web server at the root of your ProjectPier's installation directory. Note: this will overwrite some existing files with newer versions.

Using a web browser, open the URL *http://YOUR-SITE.com/public/patch/patch.php?id=086-088-a* which will run a script that will make the necessary database changes. Replace YOUR-SITE.com with your site url and possibly path (e.g. *www.yourdomain.com/projects*).

Creating user accounts

Administrator account

After your new instance of ProjectPier has been installed it is almost ready to use, but first you need to create user accounts. A minimum of one user account must be created, this is the administrator account. To create the administrator account, access the URL of your new installation (for this documentation we will use the example URL of <http://www.yourdomain.com/projects/> where *projects* represents the directory where you have installed ProjectPier). We recommend the administrator be someone within your organization who is tech savvy enough to understand the concepts of user roles and login based permissions. Within ProjectPier each user is given their own user account. This will be a unique username and password the user will enter to gain access to your installation of ProjectPier. The screen for creating the administrator account will be shown automatically after the final setup screen, a screenshot is shown in Figure 1 to the right.

To complete the installation of ProjectPier provide the information required on this form, Username, Email address, password (twice), and Company name.



Complete the installation

This is the final step of the installation process that will let you create an administrator account and provide brief info about your company

Administrator

Username: *

Email address: *

Password: *

Repeat password: *

Company

Name: *

Figure 1

NOTE: THE ADMINISTRATOR ACCOUNT IS A SPECIAL ACCOUNT AND SHOULD NEVER BE DELETED.

NOTE: DO NOT LOSE YOUR ADMINISTRATOR USERNAME AND PASSWORD. IF YOU DO FORGET YOUR PASSWORD THERE IS A PASSWORD RECOVERY OPTION ON THE LOGIN SCREEN UNDER THE "OPTIONS" LINK, BUT IT REQUIRES YOU TO KNOW THE EMAIL ADDRESS THAT WAS USED TO CREATE THE ACCOUNT.

After the administrator account has been created, ProjectPier will display the login prompt. The administrator creation page will never be shown again. Any future visits to the URL of your

ProjectPier installation will display the login prompt (unless a user has opted to save their credentials so they are automatically logged in). A screenshot of the login screen is shown in figure 2 below.



Figure 2

Use the login screen to login to your ProjectPier installation using the administrator username and password created in the previous steps.

Accounts for your staff

ProjectPier is designed such that each member of your project team will have a unique user account with a unique username and password. If your project team includes multiple companies (partners, customers, vendors, subcontractors, etc.), ProjectPier is designed to handle that. If you intend to create users other than the administrator account then continue following the steps in this section, if not jump to Configuring Permissions.

NOTE THAT EVEN THE ADMINISTRATOR ACCOUNT REQUIRES PERMISSION CHANGES BEFORE ALL THE FEATURES OF PROJECTPIER BECOME AVAILABLE.

Before creating user accounts for the staff at your company or organization, first update the information about your company. In particular, set the time zone in which most of your employees operate. To do this, select “Administration, Edit Company” from the main menu. *Note, the main menu is the menu located at the top of the page.* Fill in additional information such as the phone and mailing address information. Be sure to click the button “Edit Company” at the bottom of the page to save changes.

Creating a user account for a staff member is a two-step process. First, the person must be added as a “contact”, and then upgraded from a “contact” to a “user”. A “contact” is a person for whom you want to keep contact information; a “user” is a person whom you want to grant access your ProjectPier installation. To take the first step, locate the main menu and select “Administration, Add Contact”. Fill in the form as completely as possible; ensure that at minimum all the required fields have been completed. Required fields are denoted with an asterisk (*). Select the “Add contact” button at the bottom of the page to add the person as a contact. The Contact Detail page is now shown which shows all the details you entered related to the new contact. Next we need to “Add User” which can be done from this page by selecting the drop-down menu labeled with the number “4” (which indicates there are 4 items in the drop-down menu) and selecting “Add User”. On the “Add User” page enter all the required fields.

NOTE: DO NOT SELECT ANY CHECKBOXES UNDER THE “PERMISSIONS” SECTION AT THE BOTTOM OF THE PAGE! (SEE BUG #3232)

Select the “Add user” button to finish adding the user.

Accounts for people outside your company

ProjectPier is designed such that each member of your project team will have a unique user account with a unique username and password. If your project team includes multiple companies (partners, customers, vendors, subcontractors, etc.), ProjectPier is designed to handle that. Note that the terminology in ProjectPier is “Company”; which refers to your organization and “Clients” which refers to any company or organization outside of your own.

There are two ways to approach adding accounts for people from other companies or organizations. The first way is to create the new organization and then create contacts that belong to that organization. The second way is to create a new contact and while on the “Edit Contact” screen under the heading “Company”, select “New Company” and enter the company name. The second option is faster but does not allow you to enter all the information associated with the new company.

To take the second approach, select “Administration, Add Client” from the main menu. The “Add Client” page is now shown. Fill in the information you want to keep on record. Be sure to click the button “Add Client” at the bottom of the page to save changes.

Whether the new company was added through the first or second method as described above, the new company name will be available in the Company drop-down menu when adding any additional new contacts.

Setting User Permissions

In ProjectPier the administrator does not have access to all the functionality by default, so it is important to set user permissions. For example, the administrator cannot create a new project until permission to do so has been granted by the administrator herself/himself. Note that for each user there are global permissions as well as project level permissions. These different types of permissions are accessed in two different locations.

Begin by setting the administrator's global permissions. From the main menu select "Administration, Company". On the "Company" page scroll down to the "Users" section (*Note: NOT the Contacts section*) and locate the administrator user. Under the administrator user click the link labeled "Edit". The administrator already has most global permissions by default, but the setting "Can manage his/her own projects" is set to "No". This prevents the administrator from having the ability to create new projects. If you want the administrator account to have the ability to create new projects change this to "Yes" and click the button "Edit user account".

Continue this process for each user for which you want to grant elevated privileges, such as project managers or department managers.

To change project level permissions for each user select "Administration, Company" from the main menu. On the "Company" page scroll down to the "Users" section (*Note: NOT the Contacts section*) and locate the user for which you want to change project level permissions. Under that person's name select the link labeled "Permissions". For each project select the appropriate checkboxes and then click the "Edit Permissions" button at the bottom of the page. If you are following these instructions in order you most likely have not created any new projects yet. The project named "Welcome" may be the only project that appears. The "Welcome" project can be used for learning how to use ProjectPier; you will most likely want to create your own projects.

Activating Plugins

ProjectPier ships with 11 plugins pre-installed but deactivated. These plugins account for a major part of the functionality of ProjectPier. Please review the features of each plugin and decide to activate or not. To activate a plugin first navigate to the plugin management screen by selecting "Administration, Plugins" from the main menu. To activate an individual plugin change the selection from "Inactive" to "Active", then select the "Change" button at the bottom

of the page. Each plugin is described below to help you decide which are appropriate for your needs.

Files Plugin

The files plugin adds a file storage section (tab) to each project. Users can create folders and upload files into those folders. This is one of the most commonly activated plugins.

Form Plugin

The form plugin adds a forms section (tab) to each project. Forms can be created which allow a user to quickly submit a new task or comment on a message. This should only be activated if needed because many users may find this advanced option confusing.

I18n Plugin

I18n is short for “internationalization”, this module allows for the customization of languages in ProjectPier. See (<http://www.projectpier.org/translators-guide>) for additional information.

Activate only if you plan to create or customize a language translation for ProjectPier.

Links

The Links plugin adds a links section (tab) to each project. The links section allows users to build a collection of links (URL’s) that relate to a project. This may or may not be useful depending on the type of project you are working on.

Reminders

The Reminders plugin extends ProjectPier so that reminder emails are sent for tasks that are coming due. In addition to activating this module the Reports module must also be activated. Users can configure their reminder preferences using the Reminders tab on their My Account page. The system administrator must have knowledge and access to setup a cron task on the server hosting your ProjectPier installation.

Reports

The Reports plugin adds a reports section (tab) to each project. This can be used to generate a gantt chart including project milestones and tasks. Note that the MindMap feature does not work, see open bug #3007. A fix is in process but has not been officially released.

Tags

The Tags plugin extends milestones, task lists, messages, and files in ProjectPier to allow each type of entity to have freeform tags associated with them. Tags are used to attach identification or other meta information to one of these entities. A tags section (tab) is also added to each

project. On the Tags tab all tags used within the project are listed. Any tag listed on the Tags page can be selected to display a list of all the entities tagged with that particular information.

Tickets

The Tickets plugin adds a ticket section (tab) to each project and a My Tickets tab to each user's Dashboard page. Tickets can be associated with a milestone and assigned to a user. Each ticket has several parameters, such as a type, category, priority, status and description. Be sure to configure the ticket categories using the link in the right sidebar menu before adding your first ticket. Default ticket categories can be configured by the administrator by selecting "Administration, Configuration, Tickets" in the main menu.

Time

The Time plugin adds a time section (tab) to each project and a time section to each user's profile page. Each user can log time, which can optionally be attached to a task and flagged as billable or not. The Time Manager screen shows a summary by user or by project.

Wiki

The Wiki plugin adds a wiki section (tab) to each project. A wiki is a collection of web pages that can be edited within a web browser. This can be especially useful for collaborating on text based documents. Wiki pages can optionally be flagged as public, which means they can be viewed by users without a login.

Wikilinks

The Wikilinks plugin extends the wiki plugin by converting wiki links in format [wiki:{PAGE_ID}] with a textile link to the page. This feature is actually not working in ProjectPier 0.8.8 and advise not using it until it is fixed in a future version.

Summary

Congratulations, you have finished configuring your new instance of ProjectPier and are ready to get started collaborating on projects. It's always a good idea to have a meeting with your team to discuss that you will be using an online collaboration tool. You can also provide them with a live demonstration so they understand what to expect and their responsibilities as a member of the team. Collaboration tools are only successful if everyone involved in the project uses the tools as your organization intends. You can proceed by creating projects, milestones, tasks, etc.