JTOOLS3 – MICROMANAGER

OVERVIEW

The jTools project is a mini-ERP tailor-made for small businesses. A project follow-up module is combined with a registry and document management component.

It is an online solution with modular construction, but also it can be deployed as single installation. Version 3 is rewritten from scratch using different technology.

This application is suitable for personal use and also for small teams/companies. The basic idea behind this cloud based platform is to help in manage multiple projects. For example selling an industrial equipment involves a lot of mailings, phone conversations, meetings and can easily last for several months. The Project FollowUp module will help you to keep track of events (by adding history to the project) and to plan further steps (by adding reminders to the project). Also you can use the Registry Module to keep track of your documents, like quotation, orders, contracts, etc ...

Things will get complicated when you have to keep track of around 10 projects. With this little aid you can check what you have to do today while having your morning coffee...

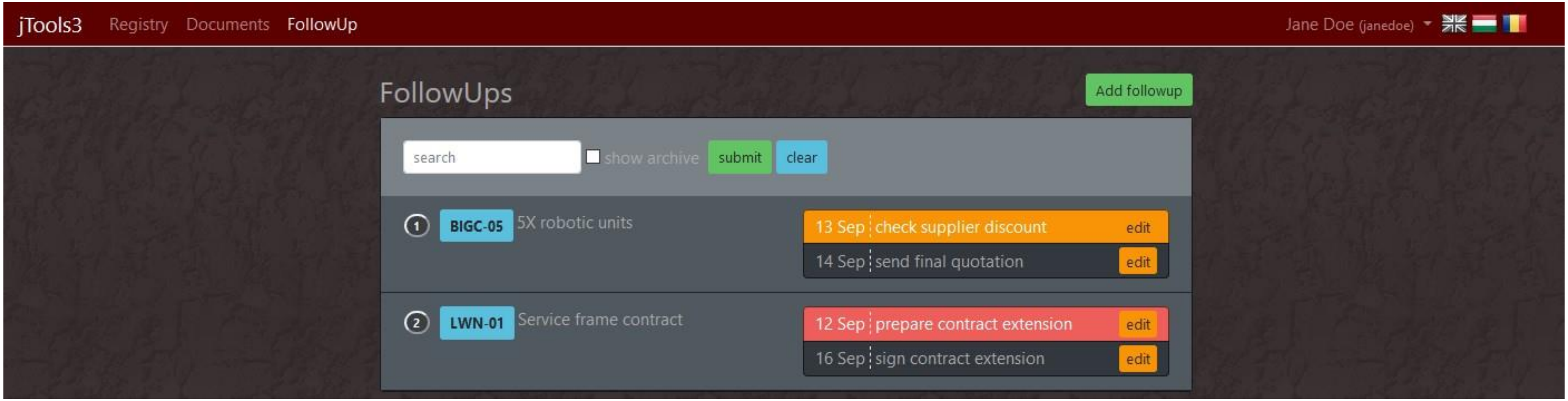


TABLE OF CONTENT

SPECIFICATIONS

Coming shortly …

EXAMPLE CASES

EXAMPLE 1: SALES AND SERVICE COMPANY

Jane and John Doe own a little family company selling and servicing small and mid-sized lawnmowers and accessories. Jane is taking care of the spare parts supply and the paperwork, while John is looking for new clients and making regular service on the sold machines.
As a small company, they have couple of frequently used documents uploaded to jTools3:

- Letterhead in .pdf and .docx format
- Order form in .pdf
- Company logo in .jpeg and .png formats

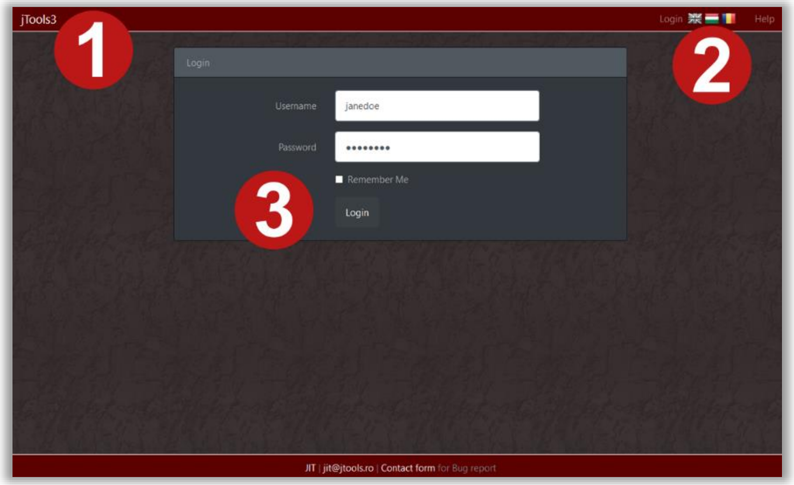
They have currently two projects running:

- 5 x Robotic lawnmower for a bigger company
- 1 x frame contract for servicing a lawn tractor park with general service and intervention

They have also a closed project which can be found in the archive of the project follow-up.
Their registry is configured to increment with 10, so they can register forgotten documents also without losing the continuity.
The lawn tractor park servicing frame contract is coming to an end in the coming days. There is a warning in the registry about that.

Names and companies are fictional, have nothing to do with any living person or business.

LOGIN



1 **Menu area**

Menu will show after login only

2 **Language selector**

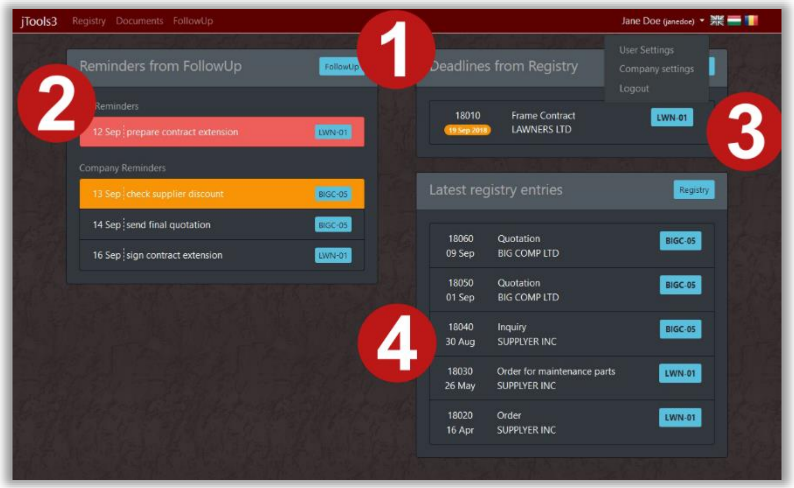
Currently available languages are: English, Hungarian and Romanian

3 **Login area**

Enter your username and password.

For the demo site [http://demo.jtools.ro] and for this document we use example one:

- username: janedoe johndoe
- password: init1234 init1234



1 Menu area

There are two sections with different menu items:

1. Left section:
   - **Site name [jTools3]** will route you to dashboard
   - **Registry**: The Registry module
   - **Documents**: The Documents module
   - **FollowUp**: The FollowUp module

2. Right section
   - **Your name, (your username)** and the Settings menu with User settings,
   - Company settings and Logout
   - **Language selector**

2 Overview of reminders from FollowUp

Here are two sections:

1. **Your reminders:** here will show up the reminders of the projects which were created by you
2. **Company reminders:** the reminders created by your colleagues, other users rendered to the same company

All the reminders have 3 sections:

1. **Reminder date**
2. **Reminder text**
3. **Project code** button – pressing this button will take you to the project's Detailed view of the FollowUp page

Pressing the Followup button in the header will take you to the FollowUp Overview page.

3 Overview of deadlines from registry

Here will show up the registered items with deadlines which will expire in the next 30 days.

The data shown in compact view with 3 columns:

1. **Registration number** and **expiration date**
2. **Description** and **partner company**
3. **Project code** in button style. This is not a link, it will not take you anywhere.

Pressing the Deadlines button in the header will take you to the Registry deadlines page.

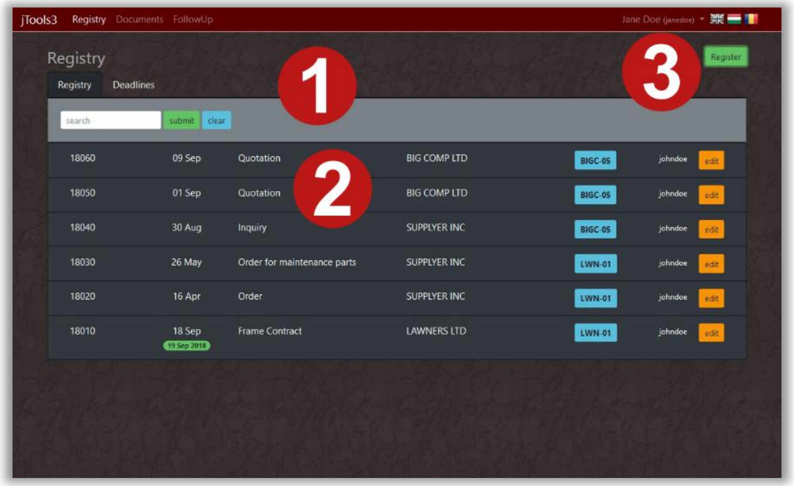
4 Latest registry entries

Here will show up the last 5 registry entries for your company in compact view with 3 columns:

1. **Registration number** and **registration date**
2. **Description** and **partner company**
3. **Project code** in button style. This is not a link, it will not take you anywhere.

Pressing the Registry button in the header will take you to the Registry page.

OVERVIEW



1 Search area

You can search any word or fragment in columns: registration number, description, company name and project code.

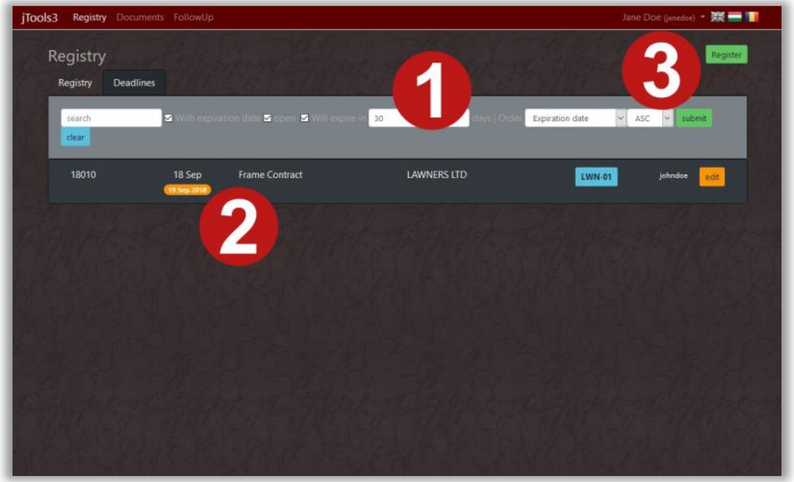
2 Registered items

There are the following columns available:

- **Registration number**
- **Registration date** and **expiration date** if any entered. The expiration date is color-coded:
  - **Yellow:** the expiration date is in the next one week
  - **Green:** the expiration date is somewhere in the future
  - **Red:** the expiration date was in the past
  - **Grey:** The expiration date is not tracked (expiration date closed is checked. See EDIT registered item for details)
- **Description**
- **Company name**
- Button style view of **project code**. This is not a link, it will not take you anywhere.
- **Username** of the person who registered the item
- **Edit** button (See EDIT registered item for details)

3 Register button

Register NEW item



1 Advances search area

You can search any word or fragment in columns: registration number, description, company name and project code. Furthermore you can filter your results by:

- Items having registration number
- The registration number is tracked or not
- The registration number will expire in the next number of days.

The results can be sorted by: registration number, registration date, expiration date, description, company name and project code.

The Deadlines page is preconfigured to show the registered items which will expire in the next 30 days sorted ascending by the expiration date

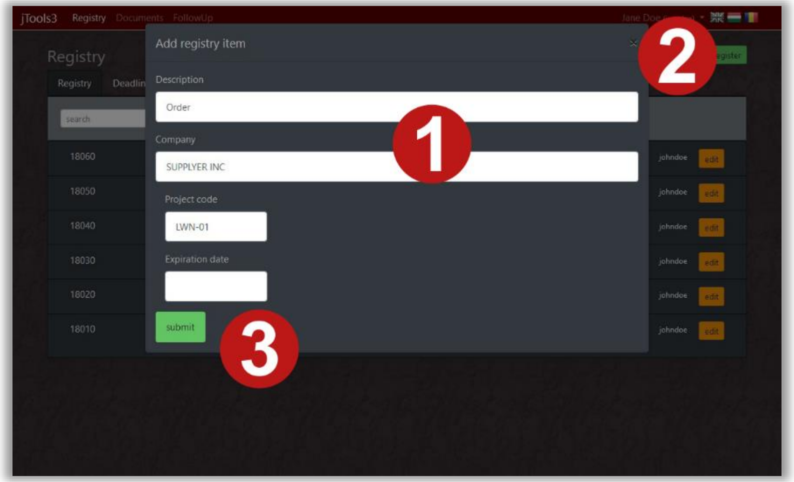
2 Registered items

There are the following columns available:

- **Registration number**
- **Registration date** and **expiration date** if any entered. The expiration date is color-coded:
    - **Yellow:** the expiration date is in the next one week
    - **Green:** the expiration date is somewhere in the future
    - **Red:** the expiration date was in the past
    - **Grey:** The expiration date is not tracked (expiration date closed is checked. See EDIT registered item for details)
- **Description**
- **Company name**
- Button style view of **project code**. This is not a link, it will not take you anywhere.
- **Username** of the person who registered the item
- **Edit** button (See EDIT registered item for details)

3 Register button

Register NEW item



Add registry item form

For quickly adding a registry item the following data is prefilled:

- **Registration number:** automatically calculated based on the
- Company settings, by adding the incremental value (default: 10) to the last registered number. This can be modified by editing the item (See EDIT registered item for details)
- **Registration date:** By default is set to today(). This can be modified by editing the item (See EDIT registered item for details)

The following options are available for input:

- **Description:** what is the item about
- **Company:** the name of the company in relation with the item
- **Project code:** if you can render this item to any project. This is a text field, you can enter any project name you want without restriction.
- **Expiration date:** you can specify here if the registration item has an expiration date.

Cancel symbol

You can cancel this popup window by pressing the X symbol.

Submit button

Registers the item.

EDIT REGISTERED ITEM

1 **Edit registry item form**

The following options are available for editing:

- **Registration number:** you can change the registration number to any number which is not already in the database.
- **Registration date:** you can change to any date.
- **Description:** what is the item about
- **Company:** the name of the company in relation with the item
- **Project code:** if you can render this item to any project. This is a text field, you can enter any project name you want without restriction.
- **Expiration date:** you can specify here if the registration item has an expiration date.
- **Expiration date closed:** if you check this option, then the system will not take in consideration the expiration date. This is useful when for example you registered in the past a contract which already is extended. In this case you do not need any more to pay attention for the original expiry date.

2 **Cancel button**

You can cancel the editing by pressing the button.

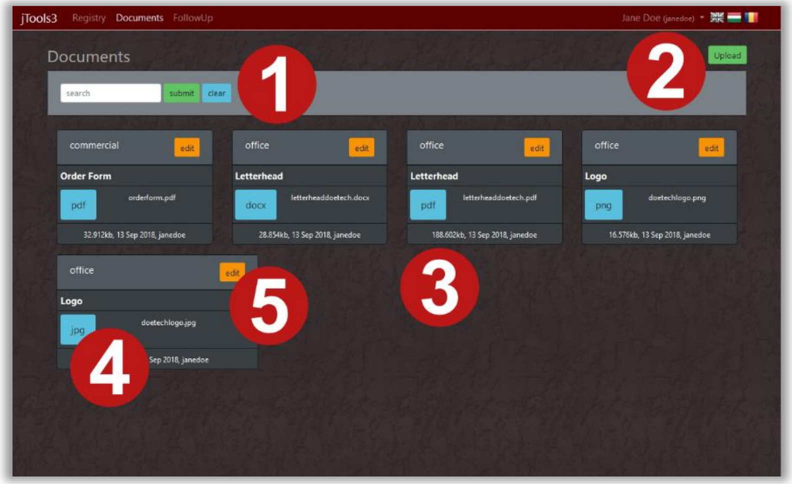
3 **Submit button**

Submits the changes to the database.

4 **Delete button**

Pressing this button will delete the registry entry **PERMANENTLY** without further question/approval request!

OVERVIEW



1 **Search area**

You can search any word or fragment in columns: registration number, description, company name and project code.

2 **Upload button**

Add new document

3 **Uploaded document cards**

The cards hold the following information:

- Card header area:
  - **Category:** Cards are ordered by category name. You can give any category name in any number of categories.
  - **Edit button**
- Card body area:
  - **Name** or title of the document which is given when submitted
  - **Type of document** in a button form. This is actually the extension of the uploaded file. When pressed the document is downloaded
  - **Filename:** this is the actual file name
- Card footer area:
  - **Size** of file
  - **Date** of upload
  - **Username:** of the person who uploaded the file

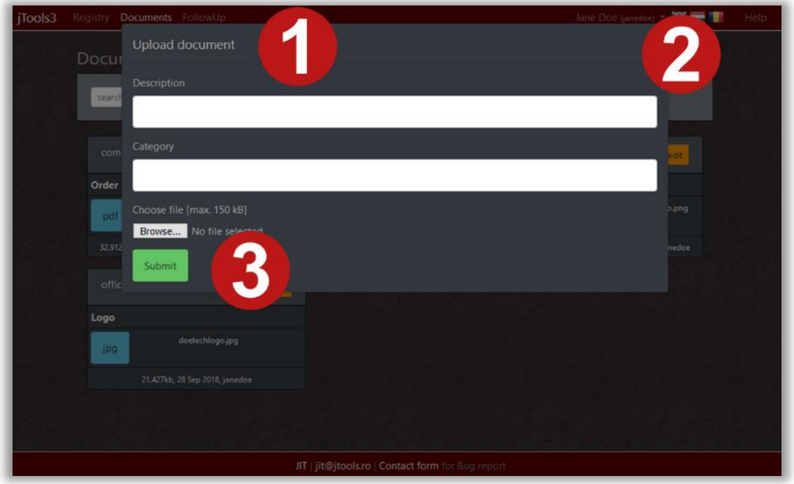
4 **Download button**

This button shows the extension of the file. When pressed the document is downloaded or shown based on your browser's settings and capabilities.

5 **Edit button**

EDIT document

ADD NEW DOCUMENT



1 Upload document form

The following options are available:

- **Description:** this will be the name or title of the document.
- **Category:** cards are ordered by category name. You can give any category name in any number of categories.
- **Choose file/browse:** here you can upload your file. It is also mentioned the size limit of the file.

2 Cancel button

You can cancel the editing by pressing the button.

3 Submit button

Submits the changes to the database.

EDIT DOCUMENT

1 Edit document form

The following options are available for editing:

- **Description:** this will be the name or title of the document.
- **Category:** cards are ordered by category name. You can give any category name in any number of categories.
- **Replace file:** here you can changed the file. . It is also mentioned the size limit of the file.

2 Cancel button

You can cancel the editing by pressing the button.

3 Submit button

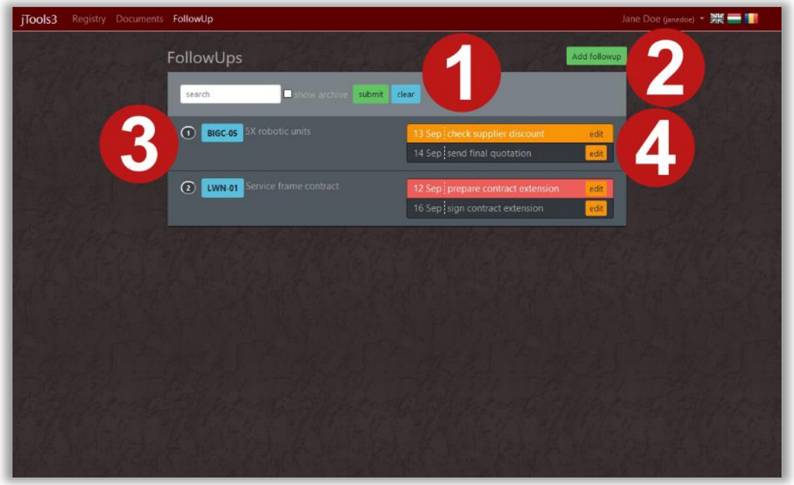
Submits the changes to the database.

4 Delete button

Pressing this button will delete the registry entry **PERMANENTLY** without further question/approval request!

FOLLOWUP

OVERVIEW



1 Search area

You can search any word or fragment in columns: description and project code. Also you can select to view the archived projects (and search in them if you wish).

2 Add FollowUp button

For details visit ADD followup

3 Projects area

Each project has 4 columns:

- **Numbering** which is the priority order. By pressing this button styled numbering, you can change the priority/ranking of the project in the list (See: Change priority).
- Button styled **project code**. Pressing this button will extend the detailed view of that particular project. Pressing it again will hide the details view.
- **Short description** of project
- **Reminder list** attached to the project. Any number of reminders can be attached to the project

4 Reminder list

The reminder list is ordered by date and has 3 columns:

- **Date:** when the event/reminder is set
- **Description:** what to remind you
- **Edit button:** EDIT reminder

The reminders are color-coded:

- **Yellow:** The reminder is set to today
- **Red:** The due date is past
- **Neutral:** The due date is in the future

1 Operations area

Here are the buttons to handle your project:

- **<u>EDIT followup</u>** where you can edit your project
- **<u>ADD reminder</u>** button
- **<u>ADD history</u>** button

2 History section

This is where the list of events related to the particular project will appear. There are 3 columns:

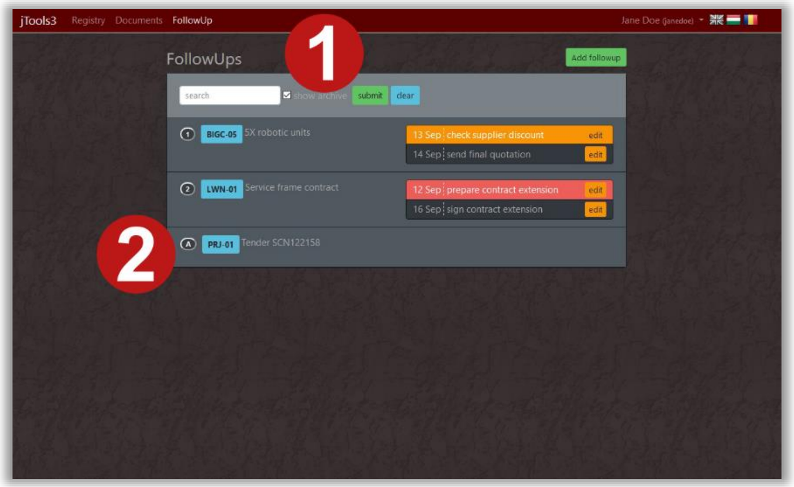
- **Date** of the history/event
- **Description** of the event
- **<u>EDIT history</u>** button

3 Registry entries section

The program will check your registry for any entry tagged with the same project code. If there is any, it will be listed here with the following information:

- **Registration number/registration date**
- **Description** of the registered item
- **Company name** from the registry entry

DETAILED VIEW WITH ARCHIVED ITEMS



1 **Search area**

You can search any word or fragment in columns: description and project code.

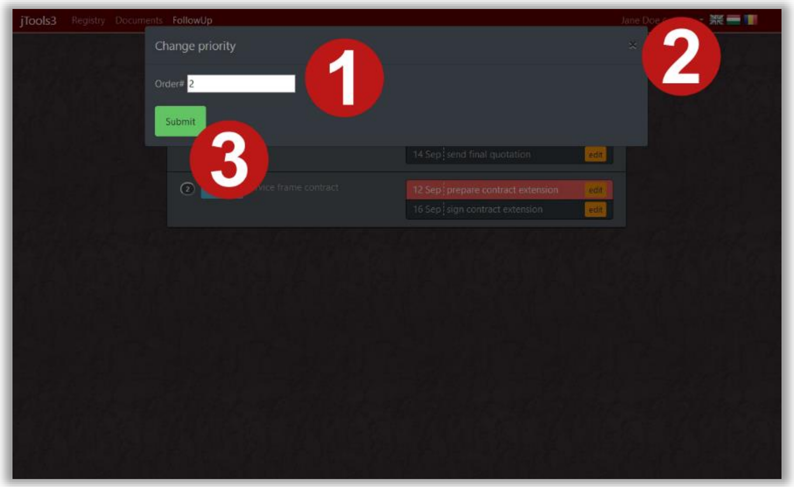
In order to view the archived projects you have to check the „show archive„ form element and press the Submit button.

2 **Archived projects**

They will show up in the end of the list with letter „A„ instead of order number. By pressing this „A„ lettered button it is possible to bring back the project to active state by entering an order number in the textbox (See: Change priority).

The archived projects can be extended and edited as active projects.

CHANGE PRIORITY



1 **Change priority form**

Here is one possibility:

- **Order#:** You can change the priority/ranking of the project in the list

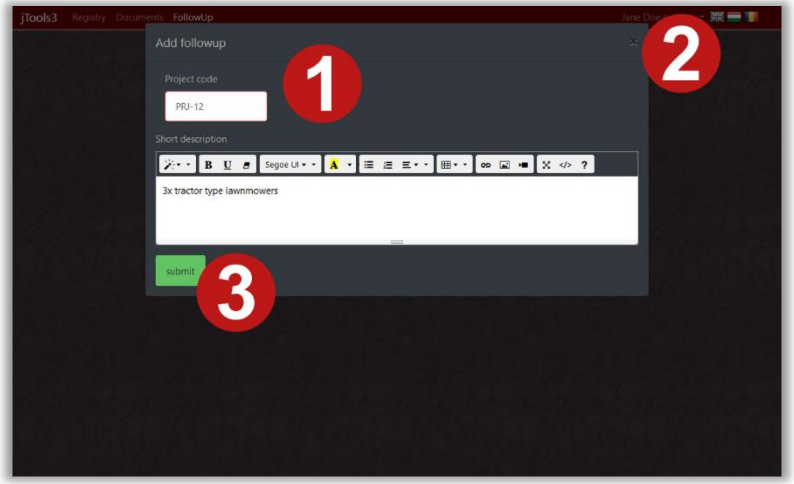
2 **Cancel button**

You can cancel the editing by pressing the button.

3 **Submit button**

Submits the changes to the database.

ADD FOLLOWUP



1 Add new project to FollowUp

The following options are available:

- **Project code:** this is the short id or short reference to your project
- **Short description:** a brief description of your project.

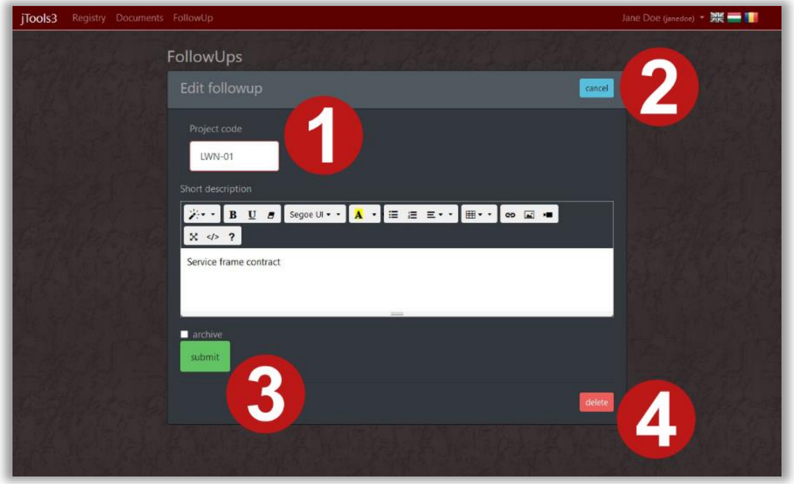
2 Cancel button

You can cancel the editing by pressing the button.

3 Submit button

Submits the changes to the database.

EDIT FOLLOWUP



1 Edit FollowUp form

The following options are available for editing:

- **Project code:** this is the short id or short reference to your project
- **Short description:** a brief description of your project.
- **Archive checkbox:** you can use this to archive your project or to bring back to active state. If the project is brought to active state than it will receive the highest priority number available, meaning the last position of the project list

2 Cancel button

You can cancel the editing by pressing the button.

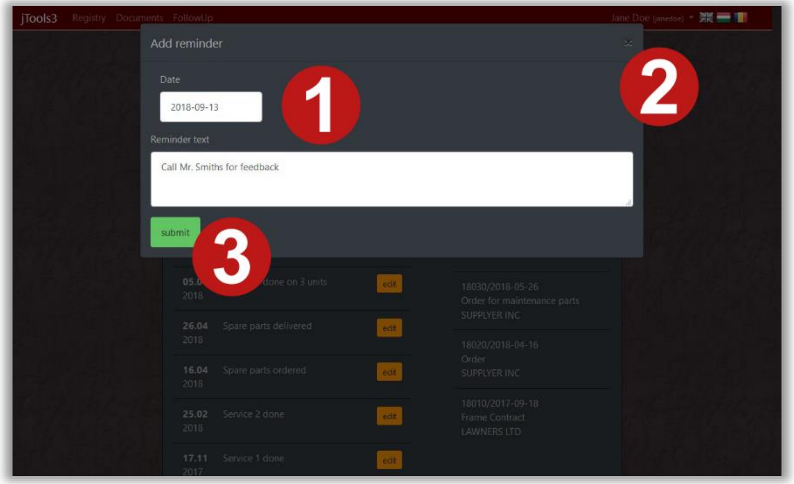
3 Submit button

Submits the changes to the database.

4 Delete button

Pressing this button will delete the registry entry **PERMANENTLY** without further question/approval request!

ADD REMINDER



1 Add reminder to a project/FollowUp

The following options are available:

- **Date:** when the reminder should occur or call it due-date.
- **Reminder text:** what is the reminder about

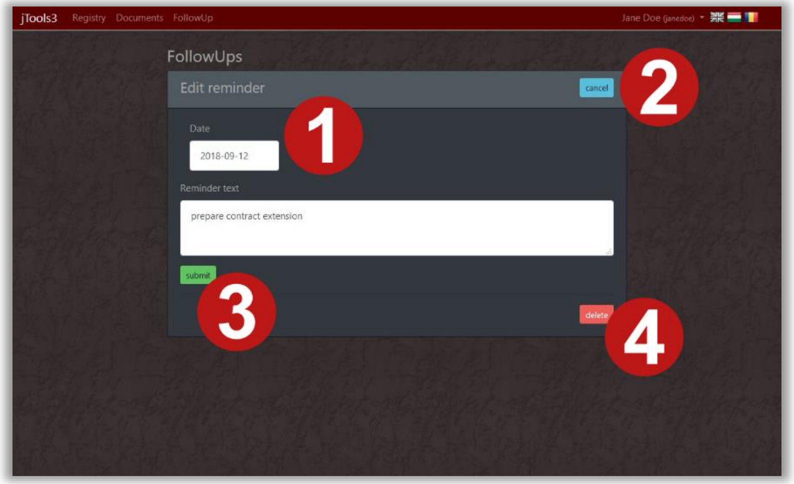
2 Cancel button

You can cancel the editing by pressing the button.

3 Submit button

Submits the changes to the database.

EDIT REMINDER



1 Edit Reminder form

The following options are available for editing:

- **Date:** when the reminder should occur or call it due-date.
- **Reminder text:** what is the reminder about

2 Cancel button

You can cancel the editing by pressing the button.

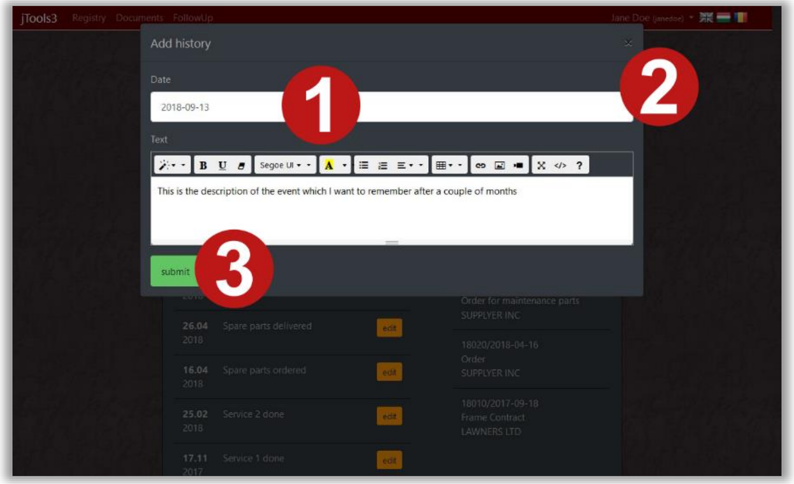
3 Submit button

Submits the changes to the database.

4 Delete button

Pressing this button will delete the registry entry **PERMANENTLY** without further question/approval request!

ADD HISTORY



1 **Add event/history to the project follow up**

The following options are available:

- **Date:** when the event occurred. By default today is selected
- **Text:** the description of the event.

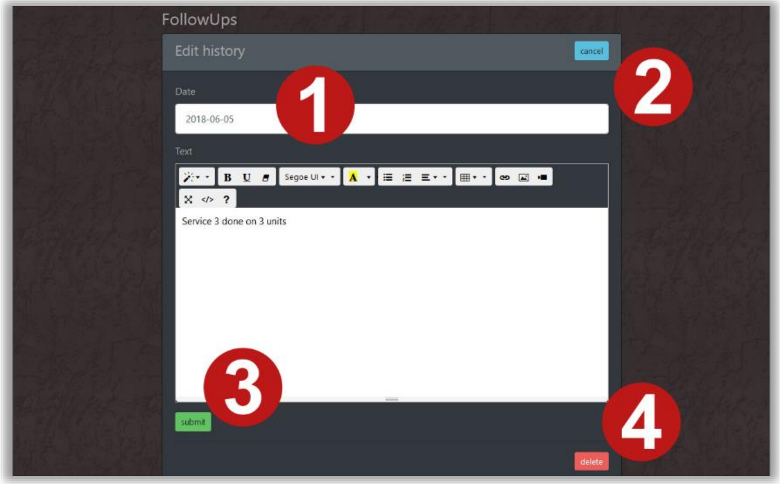
2 **Cancel button**

You can cancel the editing by pressing the button.

3 **Submit button**

Submits the changes to the database.

EDIT HISTORY



1 **Edit History form**

The following options are available for editing:

- **Date:** when the event occurred. By default today is selected
- **Text:** the description of the event.

2 **Cancel button**

You can cancel the editing by pressing the button.

3 **Submit button**

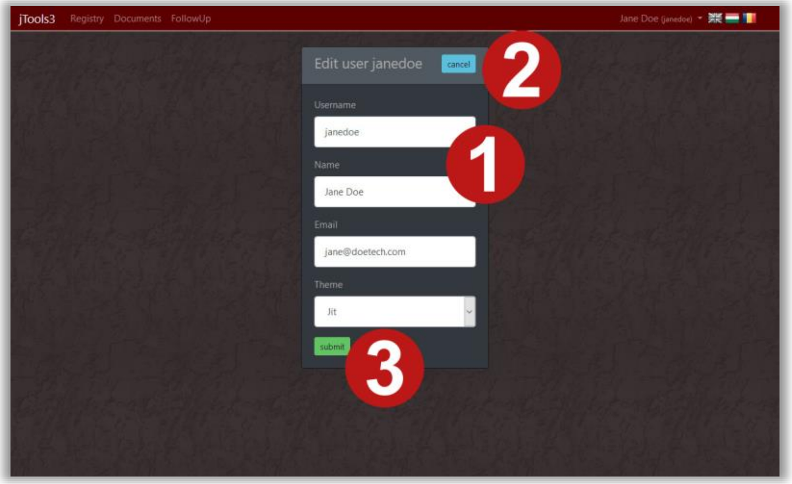
Submits the changes to the database.

4 **Delete button**

Pressing this button will delete the registry entry **PERMANENTLY** without further question/approval request!

SETTINGS

USER SETTINGS



1 **Edit User settings form**

The following options are available for editing:

- **Username**
- **Name**
- **Email** address
- **Theme:** you can change the appearance of the application

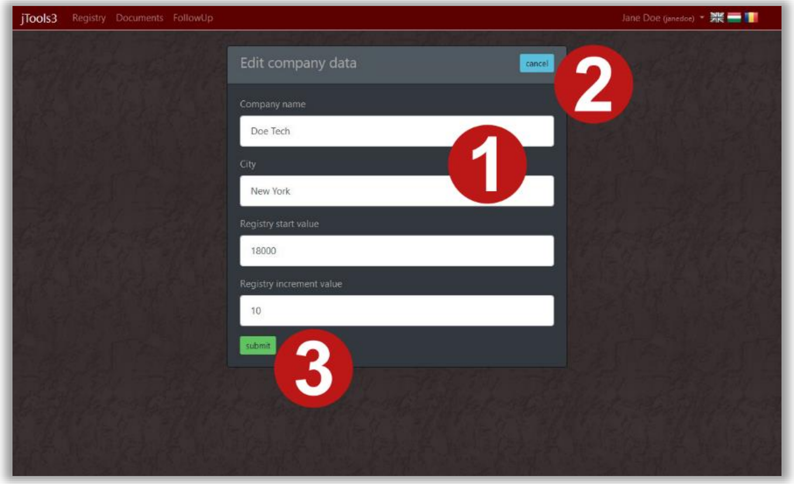
2 **Cancel button**

You can cancel the editing by pressing the button.

3 **Submit button**

Submits the changes to the database.

COMPANY SETTINGS



1 **Edit company settings form**

The following options are available for editing:

- **Company name**
- **City:** will be used in future release
- **Registry start value:** The registry number is calculated by adding a predefined value (registry increment value) to the highest registry number for your company. With this setting you can start a new series. BUT this value must be higher than your biggest registered number so far
- **Registry increment value:** the predefined value for incrementing automatically the registry number. The predefined value is 10. If this value is greater than 1, then you will be able to register older/forgotten documents to a prior date.

2 **Cancel button**

You can cancel the editing by pressing the button.

3 **Submit button**

Submits the changes to the database.