



FactoryNova

User Guide



StuffedGuys

Index

<i>User Guide</i>	1
Index	2
Installation.....	4
System requirements	4
Web server	4
PHP	4
Database	4
Browser	4
Trial version installation.....	5
Windows-based installer.....	5
Zip archive	5
Unpacking	5
Setting permissions.....	6
Installing ionCube PHP Loader	6
Commercial version installation	7
The zip.....	7
Unpacking	7
Setting permissions.....	7
Web installation wizard	8
Step 1 – Choosing a language	9
Step 2 – License agreement.....	9
Step 3 – User settings	9
Step 4 – Database settings	9
Step 5 – License key	10
Step 6 – Confirmation.....	10
Step 7 – Installation	10
Post installation steps	11
Configure manual files upload directory	11
Setup a command line script	11
Upgrade	12
Update the files	12
Launching update wizard	12
Excessive files	12
Update installation	13
Factory Nova Basics.....	14
Projects	14
Tasks	14
Discussions	15
Knowledge Base.....	15
Mail	16
Files	16
My Factory	17
Global Mail	17

Administration	17
Companies and users.....	17
Projects.....	18
Project roles.....	18
Licenses	19

Installation

Factory Nova installation is a simple process that usually takes only several minutes. But before you will start with the installation please make sure that your server meets the system requirements that are outlined below.

System requirements

Web server

Any web server that is capable of running PHP, including Apache (recommended) and Microsoft IIS.

PHP

Factory Nova works with PHP versions starting from 4.0.3. PHP should have short tags (<??>) and MySQL extension enabled, which is usually the case on most of the PHP installations.

Optionally, PHP should have a GD extension enabled (this is required for thumbnails generation and automatic image resizing).

[ionCube PHP Loader](#) is required to run the trial version (*not required* for a commercial version). Please note, that in most of the cases the Windows installer of the trial version will download and install the required loaders for you.

Database

MySQL version 3.23.54 or higher (4.0.18 or higher recommended).

Browser

Modern browser (IE 5.5+, Firefox, Safari, Opera 8+) with Javascript and cookies enabled is required.

Trial version installation

Trial version of Factory Nova comes with encrypted source code and requires ionCube PHP Loader to be installed on the server where you intend to use the trial version.

Windows-based installer

The simplest way to install the trial version is to download and run a [Windows-based installer](#). If you are using Windows on your PC then this is the best solution which we highly recommend. The installer will detect if ionCube PHP Loader is present on the server where you are installing the trial version and will try to install the loader automatically for you if this will be required.

After downloading the installer you should launch it and follow a simple installation wizard. The installer will be able to install Factory Nova either on a remote server via FTP (you will need to specify FTP access details in this case) or on a local machine. When installing on a remote server, the installer would also try to set proper file permissions where this will be required.

At the end of the installation, when you will click on the “Finish” button – a browser window will open. In the window you should see the first page of the [web installation wizard](#) with a language selection.

If instead of a wizard you see an error about missing ionCube PHP Loader then please follow the [manual instructions](#) to install the loader on your server.

Zip archive

If, for some reason, you can't use the Windows-based installer of the trial version, you can [download a zip archive](#) with all the files from the trial version and do the uploading and ionCube PHP Loader installation manually.

Unpacking

After you will download the zip file, you will need to unpack it preserving the directory structure inside of the archive (all modern archive tools do this by default). On Windows you can use a tool like WinZip to do this, on Linux or Unix based server you can use an unzip command if it is available. For example:

```
unzip factory_nova_trial_1_0_0.zip
```

If you've decided to unpack the archive on your local machine first, then you will also need to transfer all unpacked files and directories to the server. You can do this with any FTP client, for example CuteFTP on Windows.

In the root of the archive there is a directory with a name similar to "factory_nova_trial_1_0_0". The files that you need to upload to your server are located in this directory.

Setting permissions

After you will put all files and directories from the distribution archive on your server, you will need to set up proper file and directory permissions so that Factory Nova can function properly. You can do this with your FTP program or directly from a shell if you prefer to use it.

First you should rename "empty.conf.vars.php" file to "conf.vars.php". Then make sure that directory "files" and file "conf.vars.php" are readable and writable by the server (on Unix servers this usually means setting access rights 0666 for the file and the directory; on some servers it is necessary to set 0777 rights for the directory or otherwise the server won't be able to create files in it).

Installing ionCube PHP Loader

Trial version comes with encrypted source code and it is necessary to have ionCube PHP Loader installed on the server before you will be able to use the trial version (or even launch a web-based installation wizard). Usually Windows-based installer tries to configure the loader for you; if it fails or you've downloaded the trial version in a zip file then you need to do the loader installation manually.

You can download the latest version of the loaders for your server platform here:

<http://www.ioncube.com/loaders.php>

Manual installation instructions can be found here:

http://www.ioncube.com/loader_installation.php

Generally, if you used a Windows-based installer and the trial version doesn't work for you, then probably run-time loading of PHP extensions doesn't work on your server and you will need to modify php.ini file in order to install ionCube PHP Loader.

For more detailed instructions please visit the ionCube site at the URLs specified above.

Commercial version installation

You get access to commercial version of Factory Nova as soon as you purchase a master license. Commercial version is distributed with a completely open source code and thus no additional PHP extensions are required for it to work properly.

The zip

First you will need to download the zip file with latest Factory Nova distribution from your clients area at my.stuffedguys.com.

Unpacking

After you will download the zip file, you will need to unpack it preserving the directory structure inside of the archive (all modern archive tools do this by default). On Windows you can use a tool like WinZip to do this, on Linux or Unix based server you can use an unzip command if it is available. For example:

```
unzip factory_nova_1_0_0.zip
```

If you've decided to unpack the archive on your local machine first, then you will also need to transfer all unpacked files and directories to the server. You can do this with any FTP client, for example CuteFTP on Windows.

In the root of the archive there is a directory with a name similar to "factory_nova_1_0_0". The files that you need to upload to your server are located in this directory.

Setting permissions

After you will put all files and directories from the distribution archive on your server, you will need to set up proper file and directory permissions so that Factory Nova can function properly. You can do this with your FTP program or directly from a shell if you prefer to use it.

First you should rename "empty.conf.vars.php" file to "conf.vars.php". Then make sure that directory "files" and file "conf.vars.php" are readable and writable by the server (on Unix servers this usually means setting access rights 0666 for the file and the directory; on some servers it is necessary to set 0777 rights for the directory or otherwise the server won't be able to create files in it).

Web installation wizard

Now you are ready to launch the installation wizard. Just open your browser and point it to the directory on your server where you've installed Factory Nova. For example, if you've uploaded the software in directory "factory", use an URL similar to the one below

```
http://www.your-site.com/factory/index.php
```

Please replace "www.your-site.com" with an actual URL of your site.

If you did everything correctly – you will see the first page of the installation wizard (shown below).

If instead of the wizard you see a server error page please rename the ".htaccess" file which is located in the root directory of Factory Nova to ".htaccess.old" or just delete it and try to open the URL mentioned above again. If instead of the wizard you see a message that a loader is missing then you need to [manually install](#) the ionCube PHP Loader on your server first.



Step 1 – Choosing a language

Factory Nova supports a number of different languages. The language that you will choose on this step will be used on the subsequent steps in the installation wizard and as a default language for software itself. You will be able to change the language after the installation.

Step 2 – License agreement

Please read the Factory Nova license carefully. If you agree to all the terms then please check “I agree” checkbox and continue to the next step.

Step 3 – User settings

On this page you should provide information about yourself and Factory Nova.

- **Title of your Factory Nova** – this is a title of your Factory Nova installation. It will be displayed at the top of all pages in Factory Nova (for example, you can enter “Company Extranet” here).
- **Your company name** – name of your company.
- **Your full name** -- your full name.
- **Your email** – your email address. Factory Nova will send email notifications about changes in the projects to this email address.
- **Your gender** – your gender. This information is used in some places in Factory Nova to refer to you correctly (could be especially important in some languages, for example, in Russian).
- **Username** – the username that you will use.
- **Password** -- the password that you will use.
- **Re-type password** – re-type your password to make sure that you’ve entered it correctly the first time.

Step 4 – Database settings

To complete this step please make sure that you have your database access details at hand (please consult your hosting company about these details if you are not sure what they are).

- **Database host** – the default value “localhost” should work for most of the cases. You only need to change it, if your database is located on a different server from the one where you install Factory Nova.
- **Database port** – the default entry “3306” is a standard port that MySQL uses. Unless you have a non-standard database setup, you don’t need to change this.
- **Database name** – a name of the database that Factory Nova should use.
- **Database username** – a name of the user that has access to the database, specified in “Database name” field.

- **Database password** – a password of the user that has access to the database, specified in “Database name” field.
- **Tables prefix** – this is a prefix that would be used for all database tables that Factory Nova would create in your database. This is helpful when you are using one database for several different products, or even for several different installations of Factory Nova. If you are unsure about this setting, just leave the default “ns” entry unchanged.

Step 5 – License key

If you’ve already purchased a license key for Factory Nova, then please enter it in the text box on this page. If you are only evaluating the product, then just check “I want to try a trial version” checkbox and you will be able to use a full featured version of the product for 30 days without any limitations.

Step 6 – Confirmation

Please check that the information that you’ve entered in the previous steps is correct. If something was entered incorrectly, you can use the navigation buttons at the bottom of the page to go to the previous steps and correct the information.

If the entered information is correct, please proceed to the next step.

Step 7 – Installation

At this step, the installation wizard creates the required database structure and populates it with the data that you’ve provided. If no problems would be encountered, you will see a message that installation was successfully completed.

If the wizard would display an error instead, please try to resolve the problem yourself or contact Stuffed Guys for assistance.

Please note that when this step is complete you can’t go to previous steps any more.

Click on the “Login to Factory Nova” button to start working with Factory Nova.

Post installation steps

There are several things we recommend to do after a web installation wizard successfully finishes.

Configure manual files upload directory

In Factory Nova you can add files by uploading them with your browser and also by manually uploading them to the server via FTP. For the latter functionality to work you will need to do the following:

1. Create a directory somewhere on your server where you will later upload the files via FTP. Make sure that the directory has correct access rights and PHP can actually read files located in it.
2. Go to the Administration / Configuration page in your Factory Nova and specify a complete physical path to the directory which you've created in the "Manual upload directory" option.

After this, you will be able to select and import manually uploaded files in all file upload forms in Factory Nova.

Setup a command line script

There is a special script in Factory Nova that was designed to be called from the command line. It will do various tasks that should be done periodically – for example, it will download new email messages from all POP3 mailboxes configured in Factory Nova.

It is recommended to install the script as a cronjob on your server if you have a Unix-based server (Linux, FreeBSD, etc).

The script is invoked in the following way from the command line:

```
php -q /path/to/factory/index.php sc=pub action=cron
```

To run this script every 5 minutes you can put the following line in your cron (all on one line):

```
*/5 * * * * php -q /path/to/factory/index.php sc=pub action=cron  
>/dev/null 2>&1
```

Upgrade

The procedure of upgrading Factory Nova to a newer version is even easier than the initial installation.

But before starting with the update we recommend to backup your database and the “conf.vars.php” file (which is located in the main Factory Nova’s directory). In case if something will go wrong during the update process you will always be able to go back to the previous version of the software.

Please note that it is not possible to update a trial version at all. If you want to update your trial version, you first need to purchase and install a commercial license key.

Update the files

Extract all the files from the distribution zip archive and upload them to the same directory where you have originally installed Factory Nova on your server.

Launching update wizard

Now you are ready to launch the upgrade wizard. Just open your browser and point it to the directory on your server where Factory Nova is installed. For example, if it is located in a directory “factory”, use an URL similar to the one below

```
http://www.your-site.com/factory/index.php
```

Please replace “www.your-site.com” with an actual URL of your site.

If you did everything correctly – you will see the first page of the upgrade wizard. Please note that you should be logged in as an administrator in order to see the upgrade wizard and perform an update.

Excessive files

As the first step the update wizard will detect if any of the files in your installation of Factory Nova are no longer needed. For security reasons they should be deleted before you will continue with the update.

You will be able to delete the files directly from the update wizard if access rights for the excessive files allow this. If checkboxes for at least some of the files are disabled then you should delete such files manually.

If you are using Unix-based server, then you can also click on “show unix shell command” link at the bottom and a Unix “rm” command will be displayed to you. You can use the command directly from the shell on your server to quickly delete all the excessive files.

If you don't see a page with excessive files then no files were removed in the version that you are installing, this is normal.

If you want to put your own files inside the main Factory Nova directory and you don't want to delete them during the update, you can put them in a special directory called "mods" that should be located in the main Factory Nova directory. The updating wizard doesn't check this directory for excessive files.

Update installation

To start the updating process just click on the "Install update" button and follow any additional instructions that a particular update might have.

When installation of the updates will be finished you will see a message confirming this. You can go back to Factory Nova after this, the upgrade process is complete.

Factory Nova Basics

Projects

In Factory Nova projects are the main containers for the data. All the information (except Global Mail) is stored inside the project to which it belongs. This is the main design concept of this software. When you go inside a project you have to see everything that relates to it – all the tasks, discussions, knowledge base articles, files and email messages.

Various modules are available to you inside every project (they are described in more detail below). Furthermore, if a particular project doesn't need all of the available modules, you can easily disable some of them on the project configuration page.

So, for example, you could create a project only with a Knowledge Base and use it as your company's general information bank. Or, you could create a project only with a Discussions module and use it as your company's internal forums, where team members can hang out and discuss everything they want. There are lots of possibilities!

Another great feature available inside the projects is a transformation functionality. All main entities inside a project can be easily transformed into other entities. For example, you can transform a discussion post into a task and Factory Nova will automatically create a link to the original discussion – a link to the discussion will be displayed on the task page and a link to the task will be displayed on the discussion page.

Tasks

Tasks is the main module in every project. It has a sophisticated functionality which allows you to manage the tasks easily:

- Work with the tasks using a structure tree view or a simple flat list.
- Apply filters to the tasks tree or a flat list and see only the tasks that you are currently interested in.
- Save the filters to easily apply them again in the future.
- Change most of the tasks parameters (like priority, status, assignee, deadline, etc) directly from the tasks tree or a flat list.
- Use tags to mark the tasks and quickly see the tasks belonging to one or more tags.
- Discuss tasks with the whole project team or privately, so that the client does not see your discussion (this feature is also interesting when your team and your client speak different languages – you could communicate with your client in their language, but discuss the task among your team in your native language).
- Look at a complete history of a task, which shows who and when was changing the parameters of the task, and what exactly was changed.
- Attach files to the tasks (thumbnails would be automatically generated for images)
- Discuss any of the uploaded files in a separate file discussion – very convenient for discussing images (logos, site designs, etc).

Factory Nova will do its best to help you manage the tasks in the project effectively:

- Smart sorting is used both in a tree view and in a flat list – the most important tasks are displayed at the top to attract your attention. Tasks are considered to be important based on the combination of their status, priority and deadline.
- Overdue tasks are marked in red, due-today tasks are marked in yellow.
- When a task is changed, an email notification is sent to the task creator and to the person who is currently assigned to the task – thus the people who are mostly interested in the task's progress are kept informed automatically.

There are also small, but very handy features available in the tasks module. For example, a progress bar is displayed for every created tag in the project. The progress is calculated based on the number of open and closed tasks that are bound to a particular tag. If you are using tags to mark milestones in the project, you can quickly see how close a milestone is to completion. If you are using tags to mark your software releases, you can quickly see the state of a particular version, if it is ready to be released or not.

Discussions

The Discussions module provides a forum-like functionality for every project. When you need to discuss an idea which is related to the project, Discussions is the best place to do this. Start discussing a vague idea and as soon as the project team will agree on all the aspects of the idea, easily convert the discussion into a task.

It is possible to create categories in the Discussions module. This is convenient for structuring the discussions inside a project. Categories could also be made *private*. All the discussions stored inside such private categories will be invisible and inaccessible to your clients (actually to all users who do not have a privilege to see private categories in their project roles).

You can also close discussion topics which will effectively hide them from the standard topics list. This comes in handy when a discussion is finished, everything is already decided and you don't want the discussion to clutter the topics list. In some way, this is similar to closing a completed task – the discussion becomes hidden, but it is still possible to see it in a separate list of closed discussions.

You can attach files to the discussions. For images Factory Nova will automatically produce thumbnails which will be displayed inside a discussion.

Knowledge Base

In the knowledge base you can store all the vital data about the project, like access passwords, documentation, various white papers and other information.

Knowledge base uses a tree-view similar to a tree-view in the Tasks module. So you can easily add structure to all the data stored in the knowledge base.

You can add comments and attach files to any knowledge base article. For attached images Factory Nova will automatically produce thumbnails which will be displayed right on the article page.

Mail

All the email messages that are bound to a project are displayed inside a project's Mail module. A message can arrive to the global email address configured in Factory Nova and then you can manually attach it to a proper project, or you can setup an individual mailbox for a particular project and all emails coming to this mailbox will be stored in a proper project automatically by Factory Nova.

If you will send an email directly from a particular project's Mail module, it will also be stored in that project automatically. If the recipient of the email message will reply on it and the email will be retrieved by Factory Nova then a reply will be stored in a proper project too. In that case, Factory Nova will combine your original message and the reply into an email discussion and will display it to you on one page.

Factory Nova tracks email discussions by inserting a special ID in the subject of the outgoing emails. When someone replies on emails, the subject usually stays unchanged and this allows Factory Nova to understand to which email discussion a particular email message relates to.

You can mark email discussions and particular email messages as processed or as important (or both). Processed emails automatically fall to the bottom of the emails list (so that they don't attract attention). Important emails on the contrary appear at the top of the emails list (to attract attention).

Files

The Files module can't be disabled as other modules and exists in all projects. It shows all the files that were uploaded and attached to various entities in a particular project.

A special gallery mode is also available. In this mode only image files are displayed together with their thumbnails. With a gallery mode you can easily find the images that you need just by looking at their thumbnails, or you can just get a quick overview of all images in the project.

It is possible to make Factory Nova to show files in a gallery mode by default in a particular project. This is especially convenient if the project's main goal is related to images creation (for example, a design project).

My Factory

My Factory is the user's personal section in Factory Nova. In this section a user can see the tasks assigned to him/her from *all the projects*, and also manage project subscriptions.

In My Factory, tasks are always displayed in a flat list (no tree-based view). This is done for convenience of the user, with smart sorting the most important tasks that might require immediate attention are always displayed at the top.

The standard filtering functionality is also available – the user can display the tasks from particular projects, assigned to particular users (not only to him/her), with a certain status, deadline, etc. And of course, the filters could be saved and easily re-used in the future.

Global Mail

Global mail is a separate top section in Factory Nova. This is where email messages from all the projects appear as well as emails coming to a global mailbox (that could be defined in the Factory Nova configuration).

To access this section a user should have a special flag enabled called "Has access to global mail". It is possible to setup a user in Factory Nova who will *not* have administrative privileges, but will be able to use global mail and thus manage all the emails.

There are two main views in Global Mail: "Discussions" and "By companies". Discussions view lists all the available email discussions, while "By companies" view lists discussions separated by companies. Factory Nova connects email messages to companies based on the email address of the sender, using this address first a user in the database is identified and then the email is connected to the user's company.

An additional menu option called "Re-filter" is available in Global Mail. It is useful if, for example, you've added an additional email to one of the users and now want to properly connect previously unidentified email messages to that user. Factory Nova will scan all the available email messages in the database and will try to re-connect them to users based on the most current information about their email addresses.

Administration

Administration section in Factory Nova is only available to the users with administrative privileges (you can add these privileges when creating or amending a user in Administration).

Companies and users

All users in Factory Nova are always connected to a company. So, if you want to add a user from a new company, you first need to create that company record in Administration and only then add users to the company.

This user-to-company relation is important and is used throughout Factory Nova in various places (for example, in “By companies” view in Global Mail).

Projects

To work with a project you first need to create it in Administration. Please note several important project options:

- **Project status** – “In Progress” status means that a project is active and “In Archive” status means that a project is disabled. When a project is disabled – you can’t access it. A disabled project is not counted in the projects limit that might be imposed by your license.
- **Company** – a project will be displayed as belonging to the company which you will specify here. For internal projects, you can specify your own company and for client projects you can specify the client’s company.
- **Assign new tasks by default** – this is an optional setting, if you will specify a user here then all the new tasks in the project will be assigned to him/her by default. It is recommended to use this option for projects with only one user responsible for all the tasks; otherwise it is better to make a decision to whom to assign a task at the time when a task is created (this will help to avoid accidental mistakes when a task is assigned to a wrong *default* person).

For every project you can opt to assign a separate POP3 mailbox. All emails coming to such mailbox will be automatically assigned to a proper project by Factory Nova. Also, the emails that you will send from this project will have the project’s email address specified in a From field (which means that all replies will automatically get into a proper project specific mailbox too!).

Project roles

Access of a user to a project is controlled by a role. A role is a set of user privileges in a project. After you’ve created a new project, you should specify which users will have access to it and what will be their roles. Users with administrative privileges always have access to all the created projects (but if an administrator doesn’t have a role in the project, then he/she won’t appear in the list of users to whom a new task can be assigned)

To simplify the process of assigning roles, you can use role templates. Role templates are predefined sets of privileges that you can quickly select when adding a user to a project.

There are a number of pre-defined role templates that come standard with Factory Nova, but you can also easily create your own templates to suite your particular situation.

Licenses

Factory Nova licenses are based *either* on the number of active users *or* on the number of active projects (with an unlimited license also available). Such flexible approach allows you to choose the licensing scheme that is most convenient for your particular situation.

If only a few *active* users will work on a lot of different projects then a user-limited license is the best choice for you. If a lot of users will work on a few projects then you might want to choose a project-limited license.

Please note, that at any time you can disable users or projects to make room for more users or projects. For example, if a project is completed, you can disable it and thus increase the number of projects that you can have in the active status by one.