

# Jobsworth Project Management 4.0

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jw40doc.140127

# Jobsworth Project Management 4.0: Installation and Manual

jw40doc.140127

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# Contents

## Preface iv

I	INSTALLATION	1
1	base OS installation	2
2	Graphical User Interface (KDE)	3
3	Database	4
4	Apache	6
5	Servlet container	7
6	E-Mail	11
7	Jobsworth	13
8	Additional Tasks	14
9	Other Operating Systems / Distributions	15
II	ADMINISTRATION	17
10	Login	18
11	Menu Items	20
12	Widgets	58
13	Workflow	59

# Preface

Welcome to the jobsworth project management, support ticketing and CRM system. This software is licensed under the AGPLv3.

Jobsworth can be used for helpdesk support ticketing, customer liasion, resource management (eg. systems and password tracking) and has a range of CRM type functionality. Plan your projects, see your schedule, know if you're slipping behind and why. Time Tracking and extensive reports help you show your clients exactly what you've done and for how long.

- no restrictions or limits
- interactive gantt chart & scheduling
- flexible reporting
- tracks and indexes all changes
- notifications via email, rss & ical
- ldap integration
- accounting / billing system integration
- custom attributes
- inbound and outbound email integration
- sophisticated access control
- services (SLA)
- resources
- .. much much more

Further project details can be seen at [Ohloh \(https://www.ohloh.net/p/jobsworth\)](https://www.ohloh.net/p/jobsworth) .

## Support

The primary support is through the [mailing list \(https://groups.google.com/forum/#!forum/jobsworth\)](https://groups.google.com/forum/#!forum/jobsworth) or if you have a bug report, [create an issue \(https://github.com/ari/jobsworth/issues\)](https://github.com/ari/jobsworth/issues) in the tracker. If you want to write up details of a new feature you'd like to see, please use the wiki [wiki \(https://github.com/ari/jobsworth/wiki\)](https://github.com/ari/jobsworth/wiki) .

## Contributing

Code contributions are welcome to this project and the best way to go about it is to fork the git repository:

```
https://github.com/ari/jobsworth
```

Please read the DEVELOPMENT.md file in this directory for more information. Join the [developer mailing list \(https://groups.google.com/forum/#!forum/jobsworth-dev\)](https://groups.google.com/forum/#!forum/jobsworth-dev)  to discuss ideas or ask questions.

# I Installation

- 1 base OS installation 2
- 2 Graphical User Interface (KDE) 3
- 3 Database 4
- 4 Apache 6
- 5 Servlet container 7
- 6 E-Mail 11
- 7 Jobsworth 13
- 8 Additional Tasks 14
- 9 Other Operating Systems / Distributions 15

# 1 base OS installation

The base installation of Jobsworth 4.0 is very easy (big improvement to previous releases), once a server with some SQL-database and a servlet container has been set up. For those of you not setting up such servers frequently, I have added some more screenshots and commands, that might help you speeding up the installation process.



## Note

The following installation instructions are based on FreeBSD® 9.2 (10.0). Other Unix-like operating systems may also work, once a LAMP server has been set up. Especially pathes to configuration files differ in various distributions from FreeBSD® and have to be adapted individually.



## Tip

Excellent information about FreeBSD installation and configuration you find in the [FreeBSD Handbook](http://www.freebsd.org/doc/en_US.ISO8859-1/books/handbook/) ([http://www.freebsd.org/doc/en\\_US.ISO8859-1/books/handbook/](http://www.freebsd.org/doc/en_US.ISO8859-1/books/handbook/)) ↗

First of all get the base operating system running on a dedicated machine. FreeBSD 10.0 does not support old *pkg add* commands anymore. This mechanism has been replaced by *pkgng*. You have to initialize this packet manager by invoking the following command:

```
pkg
```

Add the hostname (e.g. jwserver.example.com) to /etc/hosts.

## 2 Graphical User Interface (KDE)

For a typical server environment like Jobsworth a graphical user interface is not necessary and way to much overhead. Nevertheless for testing and configuring the server it could be helpful to install a GUI. Therefore some basic installation of KDE4 is described here.

Install X11 and KDE4:

```
pkg install xorg
pkg install kde
```

Add the following lines to `/etc/rc.conf` :

```
hald_enable="YES"
dbus_enable="YES"
local_startup="${local_startup} -/usr/local/kde4/etc/rc.d"
kdm4_enable="YES"
```

Add the following line to `/etc/fstab` :

```
proc -/proc procfs rw 0 0
```

In your home-directory create (edit) the `.xinitrc` file containing:

```
exec -/usr/local/kde4/bin/startkde
```

On next reboot of your machine KDE4 will be executed.



### Tip

Now is a good point of time to update your DHCP-server and DNS-server to provide a unique IP-address and server-name.



## 3 Database

Install the database-server package. You can either use `mysql` or `postgresql`. The following example shows the setup of `mysql`. After invoking `mysql` from the command-line you should see a screen like this:

```
$ mysql
Welcome to the MySQL monitor. Commands end with -; or \g.
Your MySQL connection id is 6
Server version: 5.5.33 Source distribution

Copyright (c) 2000, 2013, Oracle and/or its affiliates. All rights reserved.
Oracle is a registered trademark of Oracle Corporation and/or its
affiliates. Other names may be trademarks of their respective
owners.

Type -'help;' or -'\h' for help. Type -'\c' to clear current input statement.

mysql>
```



### Important

If you see any minus-signs in the screenshot above: This is some unresolved rendering error problem (for PDFs only?). Be aware that those minus-signs shall NOT be typed as part of the configuration scripts that will follow.

Now type in the following commands to create the jobsworth database and a database-user. Feel free to adjust database-name, user-id and password and note it for later configuration. Then quit `mysql-console`.

```
CREATE DATABASE jwsqldb DEFAULT CHARACTER SET utf8;
CREATE USER -'jwsqldbuser'@'localhost' IDENTIFIED BY -'jwsqldbpass';
GRANT ALL PRIVILEGES ON *.* TO -'jwsqldbuser'@'localhost' WITH GRANT OPTION;
quit
```



## Note

At a later stage in this installation process Jobsworth will setup all tables and initial data on its first call.

To enable the start of mysql during start of your server, the following entry has to be inserted into your startup configuration file (e.g. /etc/rc.conf)

```
mysql_enable="YES"
```

## 4 Apache

Installation of Apache Web-Server on most OS distributions is pretty straightforward. Just install the packages delivered with your distribution. For this example I have installed Apache V2.2.

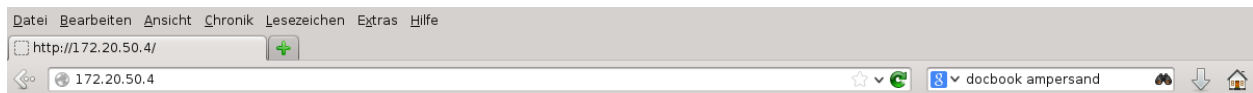
To enable the start of Apache Web-Server during start of your server, the following entry (depending on your OS and apache version) has to be inserted into your startup configuration file (e.g. /etc/rc.conf)

```
apache22_enable="YES"
```

In any browser type in the URL of your Jobsworth server. For example:

```
http://172.20.50.4
```


A simple screen shows, that Apache is running.




**It works!**

FIGURE 4.1: **APACHE WORKS**


## 5 Servlet container

Install Apache Tomcat (or another java servlet container) and make sure you can get to the default installation home page. How to install Tomcat or some other servlet container is beyond the scope of these instructions (still, some more details will follow here) but the basic details can be found in the [documentation](http://tomcat.apache.org/tomcat-7.0-doc/) (<http://tomcat.apache.org/tomcat-7.0-doc/>) . Don't be afraid of all those XML configuration files in Tomcat; mostly they can be left to default values.

There is one file you will need to edit and that is context.xml. This file defines all the configuration for your application. Copy the [example](https://github.com/ari/jobsworth/blob/master/config/context.example.xml) (<https://github.com/ari/jobsworth/blob/master/config/context.example.xml>)  into the tomcat configuration folder and set all the variables to reasonable choices for your system.



### Important

Please note that line-breaks in the following listing might be confusing. Always load actual [context.example.xml](https://github.com/ari/jobsworth/blob/master/config/context.example.xml) (<https://github.com/ari/jobsworth/blob/master/config/context.example.xml>)  file for your reference!

```
<?xml version="1.0" encoding="UTF-8"?>
<!--
This file is an example. You will need to customise it for your own needs, and
rename it
to context.xml. In Apache Tomcat it belongs inside a folder called -"config". ①

You can change the mysql driver to postgresql and you will need to replace all the
variables
which look like this ${VARIABLE} either at runtime using a script, or by editing
this file
directly.
-->

<Context swallowOutput="true">
  <Resource name="jdbc/jobsworth"
    removeAbandoned="true"
```

```

        auth="Container" type="javax.sql.DataSource"
        maxActive="100" maxIdle="30" maxWait="10000"
        username="${DBUSER}" password="${DBPASS}" ❷
        driverClassName="com.mysql.jdbc.Driver" batchSize="-1"
        url="jdbc:mysql://${DBSERVER}:3306/${DBNAME}? ❸
autoReconnect=true&zeroDateTimeBehavior=convertToNull&useUnicode=true&characterEncoding=utf8"
        validationQuery="select 1"/>

    <!-- The base domain of the running application. The actual URL you use to
    access the system is the name of the tenant followed by this. So you might
    have -'company1.acme.com' and -'company2.acme.com' --->
    <Parameter name="config.domain" value="acme.com" override="false"/>

    <!-- Jobsworth can be branded as something else --->
    <Parameter name="config.productName" value="jobsworth" override="false"/>

    <!-- SSL is good. But you may want to turn it off while you are first setting
    this up --->
    <Parameter name="config.ssl" value="true" override="false"/>

    <!-- A path to a folder on disk where jobsworth will store task attachments --->
    <Parameter name="config.storerooot" value="/var/jobsworth/assets" override="false"/
>

    <!-- What domain will mail from jobsworth come from? --->
    <Parameter name="config.email_domain" value="acme.com" override="false"/>

    <!-- Some emails like password resets will come from this user name. So in this
    example, it will be jobsworth@acme.com --->
    <Parameter name="config.email_replyto" value="jobsworth" override="false"/>

    <!-- The from user name. This is usually the same as the reply-to username --->
    <Parameter name="config.email_from" value="jobsworth" override="false"/>

    <!-- Something to put at the start of every subject on emails from jobsworth --->
    <Parameter name="config.email_prefix" value="'[jobsworth]'" override="false"/>

```

```

<!-- Jobsworth SMTP settings ---> ④
<Parameter name="config.smtp_host" value="mail.acme.com" override="false"/>
<Parameter name="config.smtp_port" value="25" override="false"/>
<Parameter name="config.smtp_domain" value="acme.com" override="false"/>

<!-- This value is used for integration with your incoming mail server. Change
it! --->
<Parameter name="config.secret" value="changeThisValueToSomethingRandom"
override="false"/>

<!-- Jobsworth email notification of errors --->
<Parameter name="config.error_email_prefix" value="'[jobsworth error]'"
override="false"/>
<Parameter name="config.error_sender_address" value="jobsworth@acme.com"
override="false"/>
<Parameter name="config.error_exception_recipients"
value="['support@example.com','sysadmin@example.com']" override="false"/>

</Context>

```

- ① If you are unsure, which "config" folder: search for a folder containing a subfolder "ROOT". It most probably is close to this. On my FreeBSD installation the config folder is located at:

```
/usr/local/apache-tomcat-7.0/conf
```

- ② Do not use variables (\$ and {} chars) but enter UID and Password enclosed in parenthesis (except you have external scripts defining those variables), e.g.:

```
username: -"uid" password: -"pw"
```

- ③ Example:

```
url="jdbc:mysql://172.20.50.4:3306/mydb?"
```

Remarks above are mandatory for getting Jobsworth running. All remarks below will add e-mail capabilities and may be configured later.

- ④ Please fill in host, port and domain as given from your e-mail provider.

To enable the start of Tomcat Servlet container during start of your server, the following entry has to be inserted into your startup configuration file (e.g. /etc/rc.conf)

```
tomcat7_enable="YES"
```

In any browser type in the URL of your Jobsworth server followed by port 8080. For example:

```
http://172.20.50.4:8080
```

If you see the following screen, your Tomcat installation has been successful.

File Edit View History Bookmarks Tools Help

Apache Tomcat/7.0.40


172.20.50.4:8080

Home Documentation Configuration Examples Wiki Mailing Lists Find Help

## Apache Tomcat/7.0.40

The Apache Software Foundation  
<http://www.apache.org/>

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

 Recommended Reading:

- [Security Considerations HOW-TO](#)
- [Manager Application HOW-TO](#)
- [Clustering/Session Replication HOW-TO](#)

Server Status  
Manager App  
Host Manager

### Developer Quick Start

- [Tomcat Setup](#)
- [First Web Application](#)
- [Realms & AAA](#)
- [JDBC DataSources](#)
- [Examples](#)
- [Servlet Specifications](#)
- [Tomcat Versions](#)

#### Managing Tomcat

For security, access to the [manager webapp](#) is restricted. Users are defined in:

```
$CATALINA_HOME/conf/tomcat-users.xml
```

In Tomcat 7.0 access to the manager application is split between different users. [Read more...](#)

- [Release Notes](#)
- [Changelog](#)
- [Migration Guide](#)
- [Security Notices](#)

#### Documentation

- [Tomcat 7.0 Documentation](#)
- [Tomcat 7.0 Configuration](#)
- [Tomcat Wiki](#)

Find additional important configuration information in:

```
$CATALINA_HOME/RUNNING.txt
```

Developers may be interested in:

- [Tomcat 7.0 Bug Database](#)
- [Tomcat 7.0 JavaDocs](#)
- [Tomcat 7.0 SVN Repository](#)

#### Getting Help

##### FAQ and Mailing Lists

The following mailing lists are available:

- [announce@tomcat.apache.org](mailto:announce@tomcat.apache.org)  
Important announcements, releases, security vulnerability notifications. (Low volume).
- [users@tomcat.apache.org](mailto:users@tomcat.apache.org)  
User support and discussion
- [taglibs-user@tomcat.apache.org](mailto:taglibs-user@tomcat.apache.org)  
User support and discussion for [Apache Taglibs](#)
- [dev@tomcat.apache.org](mailto:dev@tomcat.apache.org)  
Development mailing list, including commit messages

#### Other Downloads

- [Tomcat Connectors](#)
- [Tomcat Native](#)
- [Taglibs](#)
- [Deployer](#)

#### Other Documentation

- [Tomcat Connectors](#)
- [mod\\_ik Documentation](#)
- [Tomcat Native](#)
- [Deployer](#)

#### Get Involved

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- [SVN Repositories](#)
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- [Wiki](#)

#### Miscellaneous

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- [Legal](#)
- [Sponsorship](#)
- [Thanks](#)

#### Apache Software Foundation

- [Who We Are](#)
- [Heritage](#)
- [Apache Home](#)
- [Resources](#)

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FIGURE 5.1: TOMCAT WORKS

## 6 E-Mail

When jobsworth sends outgoing emails for task updates, they will have a reply address which looks like this:

```
task-1234@acme.domain.com.au
```

If a user hits reply to that email, you want it to be appended to the task comments. Here's how to set this up for sendmail; adapt the script for your own mail server. Mail can be running on a different server to jobsworth because we use HTTP to push the mail from your mail server to jobsworth.

Sendmail: Add an entry to `/etc/mail/local-host-names` for your hostname:

```
acme.domain.com.au
```

Add an entry to `/etc/mail/aliases` to create an alias that will hand off emails to a script:

```
jobsworth: -"|/usr/local/share/jobsworth/mail_script.sh"
```

Add an entry to `/etc/mail/virtusertable` to redirect all emails to your domain to the above alias

```
@acme.domain.com.au      jobsworth
```

run

```
make; make restart
```

in `/etc/mail` to rebuild the sendmail databases. Now create a script at `/usr/local/share/jobsworth/mail_script.sh` with the following contents

```
#!/bin/sh
SECRET=password1234
URL=https://acme.domain.com.au/emails
cat $2 -| -/usr/local/bin/curl --s --k ---data-urlencode secret=${SECRET} ---data-urlencode email@- ${URL}
```



Make sure you change the password and you make it the same as the password in the context.xml file.

## 7 Jobsworth

Stop tomcat. With FreeBSD use the following command:

```
service tomcat7 stop
```

Enter Tomcat web-directory e.g.

```
/usr/local/apache-tomcat-7.0/webapps
```

and delete (or better rename) the subdirectory ROOT. Now copy the latest version of Jobsworth installation file **ROOT.war** (<https://github.com/ari/jobsworth/releases>) ↗ into the Tomcat web-directory. Finally enable Tomcat again with

```
service tomcat7 start
```

The ROOT.war-file will now be extracted into a ROOT subdirectory. Give it a few seconds to complete before you continue.



### Tip

For the installation of any new version of Jobsworth you only have to replace the ROOT.war file.

## 8 Additional Tasks

## 9 Other Operating Systems / Distributions

This chapter covers Jobsworth 4.0 installation for other operation systems / distributions. It only will handle differences to the descriptions above.

### 9.1 openSuSE 13.1



#### Important

openSuSE 13.1 installation could not be finished due to some errors. Stay tuned for an update, once we got this running.

#### 9.1.1 Base Installation

#### 9.1.2 Database Installation

- *MariaDB* server is installed by default as a replacement of *mysql*. *MariaDB* is a fork of *mysql* and should work for Jobsworth as well.
- Enable *MariaDB* server: *yast2*, Services Manager. Enable and start the *mysql* entry.

#### 9.1.3 Apache Installation

- Install *apache2* package via *Yast*.
- Install *yast2-http-server* package via *Yast*.
- Within *Yast* run the HTTP-Server configuration wizard.
- Test, your HTTP-Server is running by opening a browser with *localhost* URL. If you get *access forbidden* message, check if there is an *index.html* File in */srv/www/htdocs*. If there is no such file, copy a simple valid *index.html* file to this position and it "should" work.

## 9.1.4 Tomcat Installation

- Install *tomcat* package via Yast.
- Optionally install *tomcat-webapps* package via Yast. This gives you visual feedback, that installation of tomcat was successful.
- Enable Tomcat: yast2, Services Manager. Enable and start the *tomcat* entry.
- Test, Tomcat is running by opening a browser with *localhost:8080* URL.

## 9.1.5 Jobsworth Installation



### Important

Jobsworth Installation did not succeed. Still investigating.

## II Administration

- 10 Login 18
- 11 Menu Items 20
- 12 Widgets 58
- 13 Workflow 59

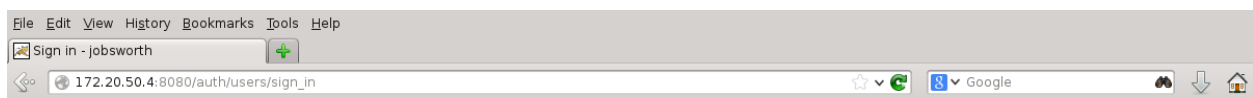
# 10 Login

After you have successfully managed the installation part, it's time to login and start exploring Jobsworth 4.0.

Open the browser of your choice (currently supported are: Internet Explorer, Firefox, Chrome) and type in the URL of your Jobsworth server followed by port 8080. For example:

```
http://172.20.50.4:8080
```

This will lead you to the following login screen.

A 'Sign in' form with a light gray background. At the top, the text 'Sign in' is displayed. Below it, a red error message box contains the text 'Invalid user or password'. The form includes two input fields: 'Username' and 'Password'. Below the password field is a 'Remember me' checkbox. At the bottom, there is a 'Login' button and a link that says 'Forget your password?'.

**FIGURE 10.1: LOGIN**



## Important

The default user after installation is *admin/password* . During first login all database tables will be generated and filled with some initial content. This may take a while. Please stay patient. For security reasons change the password as soon as possible.



# 11 Menu Items

Jobsworth needs some basic preparation (e.g. project and company setup), before each function can be used. Nevertheless the Author decided to describe the menu in the order it appears on the screen. A kind of workflow may be added later.

## 11.1 Overview

### 11.1.1 Dashboard

The Dashboard is a pretty powerful information overview that can be customized both for administrator and individually per user. Lots of options allow to individually select the information for your individual needs. The Dashboard is preconfigured with most important widgets. Enter the *Create* menu to add more widgets.

All widgets will get described later in this document



#### Important

Currently there are some issues maintaining widgets. This should be eliminated in one of the later releases. Until then Widgets cannot be deleted. Using firefox (compared to Internet Explorer) Widgets cannot get configured. Some more problems currently occur.

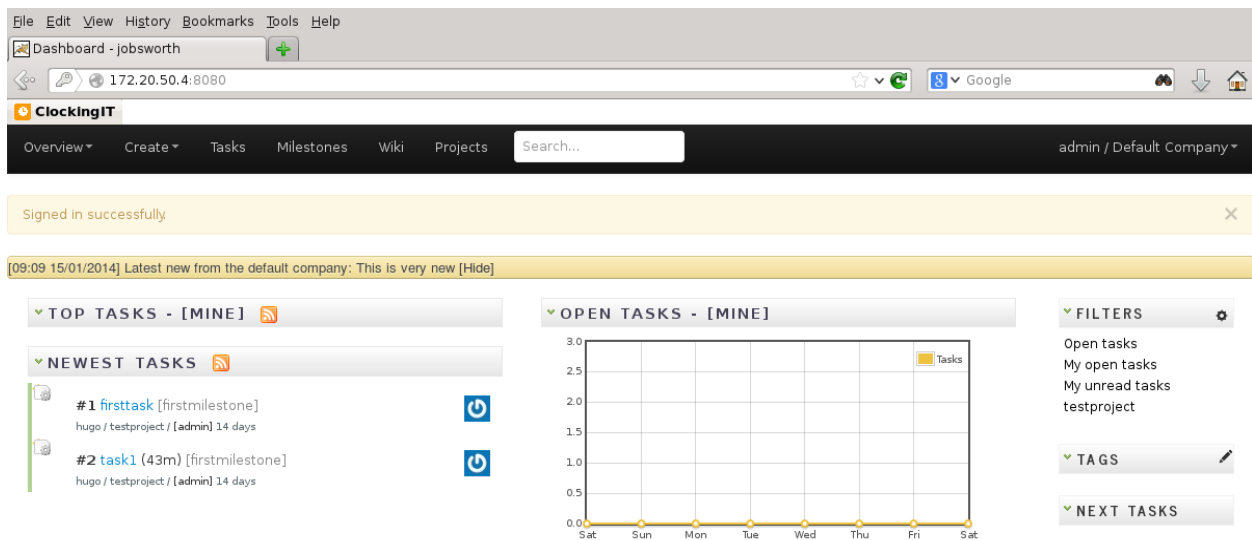


FIGURE 11.1: DASHBOARD

## 11.1.2 Planning

This screen will allow you to plan your tasks.



### Note

This screen looks pretty empty after install and will make sense, once some tasks have been generated.

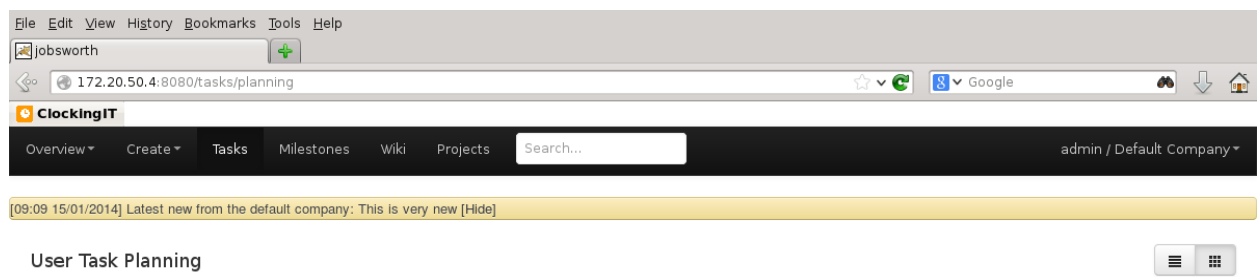


FIGURE 11.2: **PLANNING**

## 11.1.3 Billing

The screenshot shows a web browser window with the address bar displaying "172.20.50.4:8080/billing/list". The browser's address bar also shows "Billing - jobsworth" and a search bar with "Google". The page title is "ClockingIT". The navigation bar includes links for "Overview", "Create", "Tasks", "Milestones", "Wiki", and "Projects", along with a search bar and the user "admin / Default Company". A yellow notification bar at the top reads "[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]". The main content area is titled "Billing Reports" and contains a form with the following elements:

- A dropdown menu labeled "Time Sheet" with a downward arrow.
- A "Report filter" section with four dropdown menus: "[Any Project]", "[Any User]", "[ All ]", and "This Week".
- Two checkboxes: "Hide approved logs" and "Hide rejected logs".
- A blue button labeled "Run Report".

FIGURE 11.3: BILLING

## 11.1.4 History

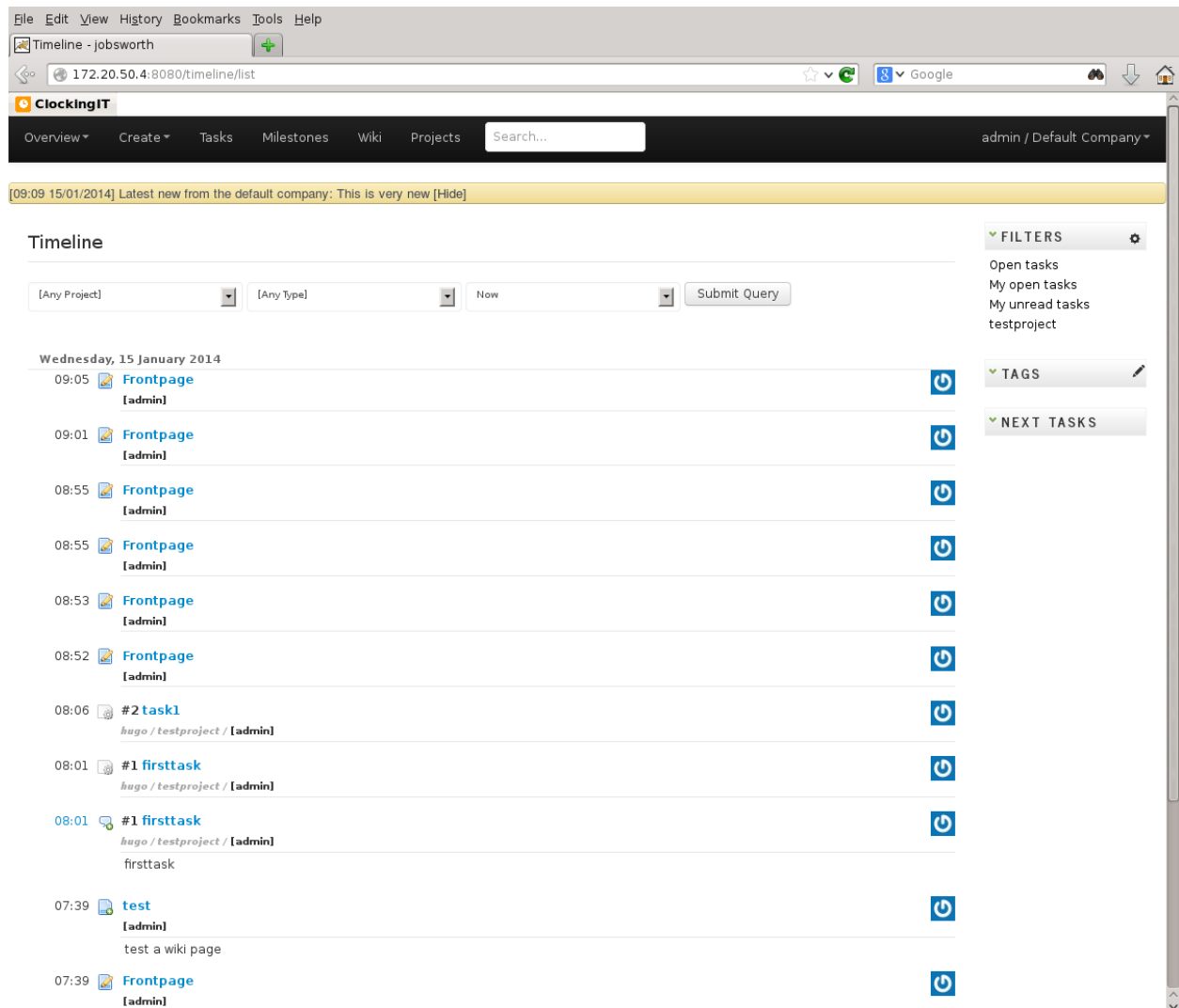


FIGURE 11.4: HISTORY

## 11.2 Create

Many screens within this section contain additional widgets on the right. Please refer to the linked sections for more information about widgets used in various screens:

- *Section 12.1, “Filters”*
- *Section 12.3, “Tags”*
- *Section 12.2.2, “Next Tasks”*

## 11.2.1 Create Task

The screenshot shows the 'New Task' form in the ClockingIT application. The form is organized into several sections:

- Task Name:** A large text input field at the top.
- Task Description:** A large text area for describing the task.
- Task Details:** Fields for Project (dropdown), Milestone (dropdown), Time (input), Estimate (input), Target Date (input), and Resolution (dropdown).
- Attributes:** Fields for Tags (input), Type (dropdown), Priority (dropdown), Severity (dropdown), and Service (dropdown). A 'billable' checkbox is also present.
- Notifications:** Fields for Companies (input) and Users To Notify (input with a user icon).
- Snooze until:** A section with a checkbox for 'Until customer responds' and a date input for 'Snooze until'.
- Resources:** A section with a 'Linked Resources' input field.

A 'Save' button is located at the bottom right of the main form area. On the right side of the form, there are three panels: 'FILTERS' (with links like 'Open tasks', 'My open tasks'), 'TAGS' (with an edit icon), and 'NEXT TASKS'.

FIGURE 11.5: CREATE TASK



### Tip

Task dependencies are described here: [Task dependencies \(https://github.com/ari/jobsworth/wiki/Dependencies\)](https://github.com/ari/jobsworth/wiki/Dependencies) . Needs some work to get included here.

## 11.2.2 Create Project

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/projects/new'. The browser's title bar says 'New Project - jobsworth'. The page header for 'ClockingIT' includes navigation links: Overview, Create, Tasks, Milestones, Wiki, and Projects, along with a search bar and a user profile 'admin / Default Company'. A yellow notification bar at the top of the page content area reads: '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The main section is titled 'New Project' and contains the following form fields:

- Name:** A text input field.
- Company:** A text input field with a small icon to its right.
- Default Estimate:** A text input field containing the value '1.0'.
- Description:** A large text area.
- Copy permissions from:** A dropdown menu currently showing 'None'.

At the bottom of the form is a blue 'Create' button. On the right side of the form, there are three expandable sections:

- FILTERS:** Includes a gear icon and a list: Open tasks, My open tasks, My unread tasks, testproject.
- TAGS:** Includes a pencil icon.
- NEXT TASKS:** A section header.

FIGURE 11.6: CREATE PROJECT

## 11.2.3 Create Milestone

The screenshot shows a web browser window with the URL `172.20.50.4:8080/milestones/new`. The application is 'ClockingIT' and the user is 'admin / Default Company'. The main navigation bar includes 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects'. A search bar is also present. A status bar at the top shows the time '09:09 15/01/2014' and a message 'Latest new from the default company: This is very new [Hide]'. The 'New Milestone' form is displayed with the following fields:

- Project:** A dropdown menu with 'testproject' selected.
- Name:** A text input field.
- Status:** A dropdown menu with 'planning' selected. Below it, a note reads 'planning (can add tasks, all tasks are snoozed)'.
- Due Date:** A text input field.
- Description:** A large text area.

At the bottom of the form is a blue 'Create' button. On the right side, there are three sidebar sections:

- FILTERS:** Includes a gear icon and a list: 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'.
- TAGS:** Includes a pencil icon.
- NEXT TASKS:** A section header.

FIGURE 11.7: CREATE MILESTONE



## 11.2.4 Create Person

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/users/new'. The browser's menu bar includes 'File', 'Edit', 'View', 'History', 'Bookmarks', 'Tools', and 'Help'. The page title is 'ClockingIT'. The navigation bar contains links for 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects', along with a search bar and the user 'admin / Default Company'. A yellow notification bar at the top states: '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The main content area is titled 'New user' and contains the following form fields:

- Name:
- Email:
- Username:
- Password:
- Company:
- color:
- Send welcome email: ☐
- Signup Message: 

input welcome message here

The message will be included in the signup email.
- Copy permissions from:

A blue 'Create' button is located at the bottom of the form.

FIGURE 11.8: CREATE PERSON

## 11.2.5 Create Company

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/customers/new'. The application header includes a menu with 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects', along with a search bar and a user profile 'admin / Default Company'. A yellow notification bar at the top states: '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The main content area is titled 'New Customer' and contains three input fields: 'Name', 'Contact name', and 'Active' (a checkbox). A blue 'Create' button is located at the bottom of the form. On the right side, there are three expandable sections: 'FILTERS' (showing 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'), 'TAGS', and 'NEXT TASKS'.

FIGURE 11.9: CREATE COMPANY



### Important

You might get confused by terms *company* and *customer* that are not used consistently. The admin is assigned to one company (e.g. default\_company) and creates multiple instances of customers he is working for or people are employed by. Be aware that people always can see all customers (important for running multiple projects on one jobsworth server).

TABLE 11.1: CREATE COMPANY INPUT FIELDS

Field	Purpose
Name	Enter a new customer name. People, Projects and Tasks are assigned to customers.
Contact Name	Enter the user's name of a previously defined person or leave the field empty for now.
Active	Select this customer to be active or inactive.

Once you have created the new customer, type in the name in the search button on the top. A new (extended) customer view will open which in addition contains multiple tabs.

**TABLE 11.2: EDIT COMPANY TABS**

<b>Tab</b>	<b>Purpose</b>
Active Users	Shows all active users belonging to the customer.
Inactive Users	Shows all inactive users belonging to the customer.
Current Projects	Shows assigned projects and associated milestones. From here you can enter those by just clicking the names.
Completed Projects	Shows completed projects.
Score Rules	Lets you create, edit and delete companies (customer's) score rules.
Sites	Shows all business units or locations of the customer.
Resources	Shows all defined resources of this customer. Click on an item to enter the detail page
Services	??? unclear to me

## 11.2.6 Create Resource

The screenshot shows a web browser window with the URL `172.20.50.4:8080/resources/new`. The application is 'ClockingIT' and the user is 'admin / Default Company'. The main form is titled 'New Resource' and contains the following fields:

- Name:
- Company:  (with a copy icon)
- Parent Resource:
- Type:  (with a dropdown arrow)
- Active: ☒
- Notes:

Below the form is an 'Attributes' section with a 'Create' button. On the right side, there are three panels: 'FILTERS' (with a settings icon) containing 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'; 'TAGS' (with an edit icon); and 'NEXT TASKS'.

FIGURE 11.10: CREATE RESOURCE


Resource is a generic term for anything that you want to be relevant in planning a project. It could be for example:

- Websites
- Computers
- Rooms
- Whiteboards
- Projectors
- ... and more

Be sure to define appropriate resource-types prior to defining the individual resources.



## Tip

More information on resource-management can be found here: [Resource Management \(https://github.com/ari/jobsworth/wiki/Resource-management\)](https://github.com/ari/jobsworth/wiki/Resource-management)  .  
Needs some work to get included here.

## 11.2.7 Add New Widget

This menu option only will show up, when the Dashboard is displayed. You will be guided to add a new widget for the Dashboard. After specifying a name and the type of the widget additional information is requested. The different types of widgets are described here: [Chapter 12, Widgets](#)

## 11.3 Tasks

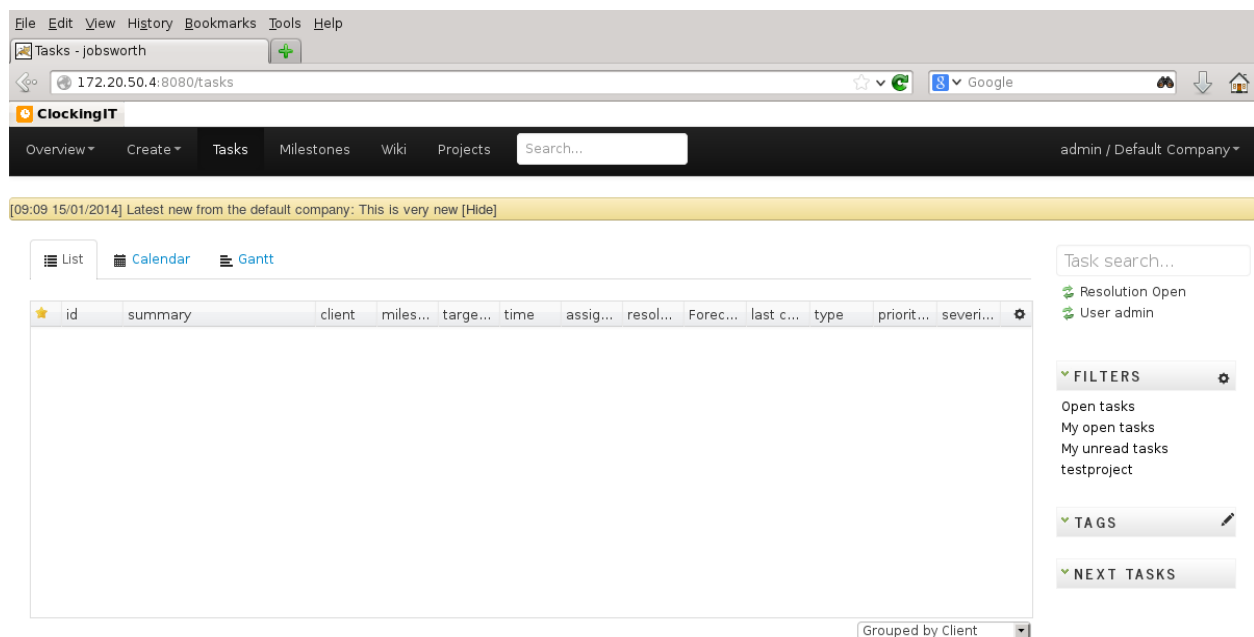


FIGURE 11.11: TASKS

## 11.4 Milestones

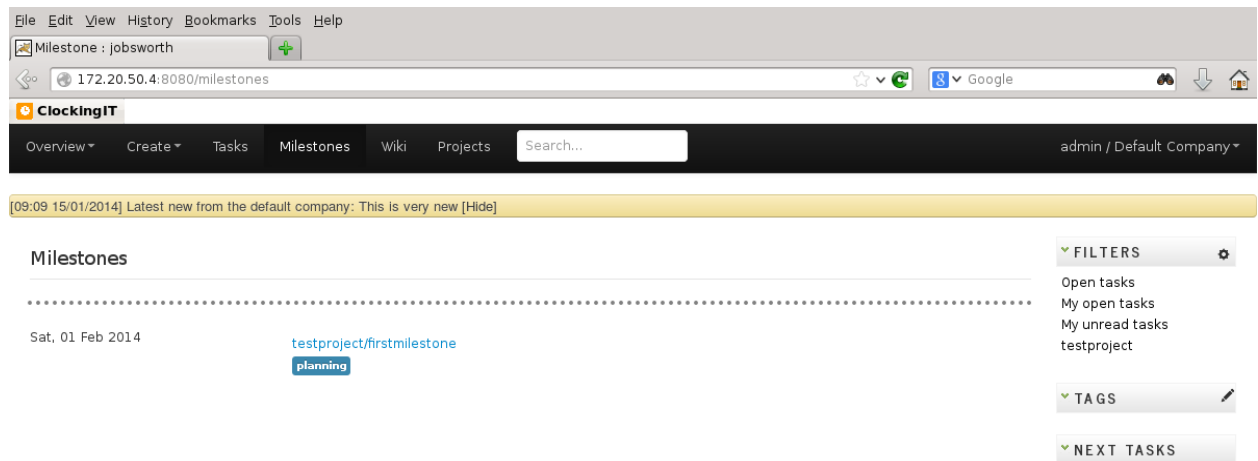


FIGURE 11.12: MILESTONES

## 11.5 Wiki

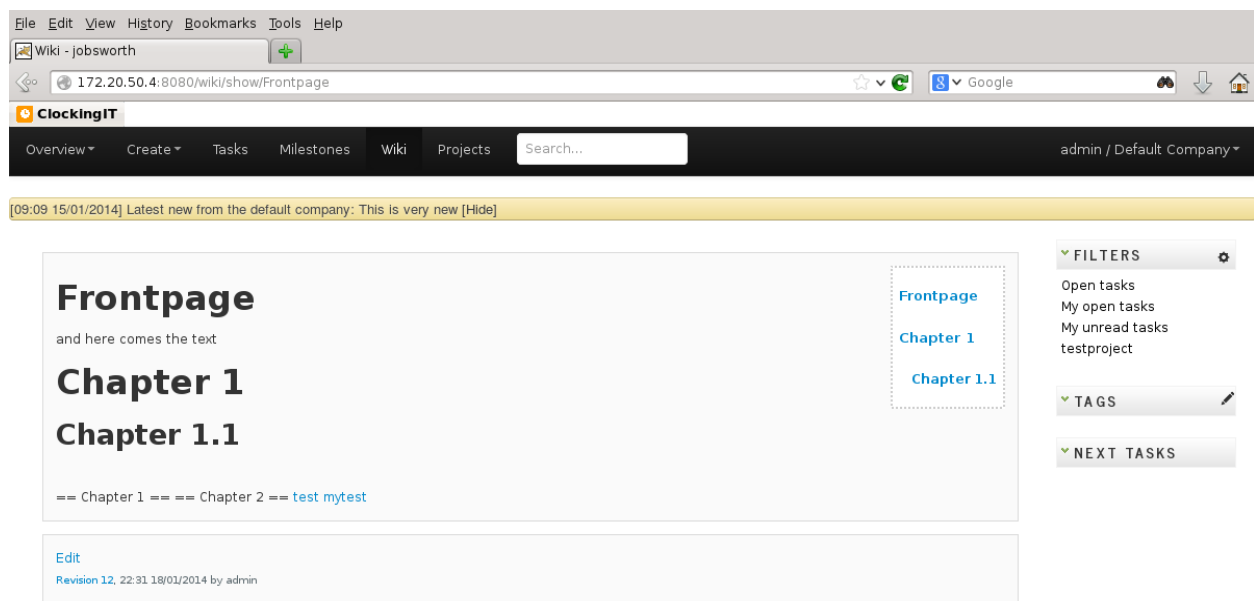


FIGURE 11.13: WIKI

## 11.6 Projects

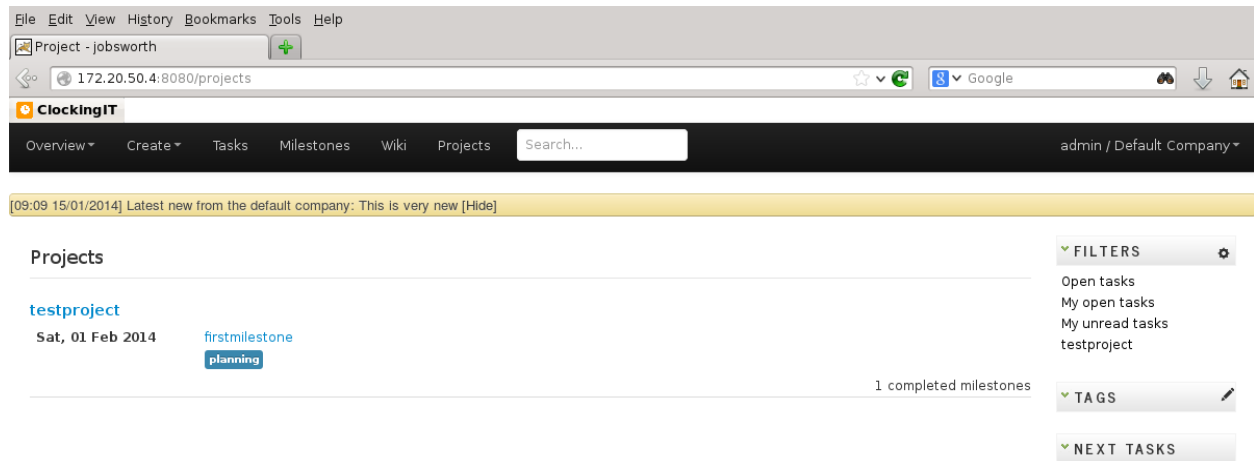


FIGURE 11.14: PROJECTS

## 11.7 Search

The search field allows you to find items in different categories. Type in at least three consecutive characters (the underline character will act as a wildcard-char) and depending on the context you will be prompted with a result list containing items of following categories:

- Company / Customers
- Milestones
- People
- Projects
- Resources



- Tasks

After selection you will be led to the items detail page.

## 11.8 MyAccount

### 11.8.1 General

The screenshot shows the 'ClockingIT' web application interface. The top navigation bar includes links for Overview, Create, Tasks, Milestones, Wiki, and Projects, along with a search bar and the user's name 'admin / Default Company'. A sidebar on the left contains a menu for 'ADMIN' with options like General, Access Control, Email Addresses, Task Filters, Projects Permissions, and Work Plan. The main content area displays the 'admin' user's profile settings, including fields for Name, Username, Password, Company, color, New Avatar, Language, Location, and various notification and tracking preferences.

admin		View Tasks
Name	admin	
Username	admin	
Password		
Company		
color	blue	
New Avatar	Browse... No file selected. <small>(Will be resized to 25x25 and 50x50 while preserving aspect ratio)</small>	
Language	en	
Location	UTC	
Receive Notifications	<input checked="" type="checkbox"/>	
Receive Own Notifications	<input checked="" type="checkbox"/>	
Automatically add this user to tasks for	<input type="checkbox"/>	
Active	<input checked="" type="checkbox"/>	
Time Format	16:00	
Date Format	21/1/2007	
Track Time	<input checked="" type="checkbox"/>	
Show Avatars	<input checked="" type="checkbox"/>	

FIGURE 11.15: GENERAL

## 11.8.2 Access Control

The screenshot shows the ClockingIT web application interface. The browser address bar displays '172.20.50.4:8080/users/1/access'. The application header includes a menu with 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects', along with a search bar and the user 'admin / Default Company'. A yellow notification bar at the top states: '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. On the left, the 'ADMIN' sidebar has 'Access Control' selected. The main content area is titled 'admin' and contains a list of permissions, each with a checked checkbox: 'Administrator', 'Can Create Projects', 'Read client details', 'Create clients', 'Edit client details', 'Approve work logs', and 'Access Resources'. Below these is a 'Comment access level' dropdown menu and a 'Widget Key' field with the value '916feaf369f78f88e1c8fd70a9f7f3e0'. A 'Save' button is at the bottom.

Permission	Status
Administrator	<input checked="" type="checkbox"/>
Can Create Projects	<input checked="" type="checkbox"/>
Read client details	<input checked="" type="checkbox"/>
Create clients	<input checked="" type="checkbox"/>
Edit client details	<input checked="" type="checkbox"/>
Approve work logs	<input checked="" type="checkbox"/>
Access Resources	<input checked="" type="checkbox"/>

Comment access level:

Widget Key: 916feaf369f78f88e1c8fd70a9f7f3e0

[Save](#)

FIGURE 11.16: ACCESS CONTROL

## 11.8.3 E-Mail Addresses

The screenshot shows the ClockingIT web application interface. The browser address bar displays '172.20.50.4:8080/users/1/emails'. The application header is identical to the previous screenshot. The 'ADMIN' sidebar on the left has 'Email Addresses' selected. The main content area is titled 'admin' and features a 'View Tasks' button. Below the title is a text input field containing 'admin@example.org' with a 'Default' tag. Below this is another input field labeled 'input email address' and an 'Add' button.

admin@example.org Default

input email address [Add](#)

FIGURE 11.17: E-MAIL ADDRESSES

## 11.8.4 Task Filters

The screenshot shows the ClockingIT web application interface. The browser address bar displays '172.20.50.4:8080/users/1/filters'. The navigation bar includes 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects', along with a search bar and the user 'admin / Default Company'. A sidebar on the left lists administrative options: 'ADMIN', 'General', 'Access Control', 'Email Addresses', 'Task Filters' (highlighted), 'Projects Permissions', and 'Work Plan'. The main content area is titled 'admin' and 'Shared filters', indicating that no filters have been shared. Below this, a section titled 'My filters' shows a single filter named 'testproject Shared' with 'Hide' and 'Delete' links. A 'View Tasks' button is located in the top right corner.

FIGURE 11.18: TASK FILTERS

## 11.8.5 Projects Permissions

The screenshot shows the ClockingIT web application interface for the 'Projects Permissions' page. The browser address bar displays '172.20.50.4:8080/users/1/projects'. The navigation bar and sidebar are consistent with the previous screenshot, with 'Projects Permissions' highlighted in the sidebar. The main content area is titled 'admin' and features a 'New user' button. A table lists permissions for the 'testproject' across various actions. All permissions are granted, indicated by green checkmarks. Below the table is a form to 'Add project to user'.

Project	Read	Comment	Work	Close	See Unwatched	Create	Edit	Assign	Milestone	Reports	Grant	All
testproject	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

FIGURE 11.19: PROJECTS PERMISSIONS

## 11.8.6 Work Plan

File Edit View History Bookmarks Tools Help

User: admin - jobsworth

172.20.50.4:8080/users/1/workplan

ClockingIT

Overview Create Tasks Milestones Wiki Projects Search... admin / Default Company

[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]

ADMIN

- General
- Access Control
- Email Addresses
- Task Filters
- Projects Permissions
- Work Plan

admin [New user](#)

### Recent work

- last Wed #2 task1 (43m spent)
- last Wed #2 task1 (43m spent)
- last Wed #1 firsttask (0m spent)
- last Wed #1 firsttask (0m spent)

### Next Tasks

### Work Plan

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.0	8.0	8.0	8.0	8.0	0.0	0.0

[Update](#)

FIGURE 11.20: WORK PLAN

## 11.9 Company Admin

### 11.9.1 General

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/companies/1/edit'. The browser's menu bar includes 'File', 'Edit', 'View', 'History', 'Bookmarks', 'Tools', and 'Help'. The page title is 'Company Settings - jobsworth'. The browser's address bar shows '172.20.50.4:8080/companies/1/edit'. The page features a navigation bar with 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', 'Projects', and a search bar. The user is logged in as 'admin / Default Company'. A yellow notification bar at the top states: '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The left sidebar, titled 'ADMIN PANEL', lists 'General' (selected), 'Score Rules', 'Task Templates', 'Triggers', 'Services', 'News items', 'Snippets', and 'Orphaned Emails'. Below these are 'PROPERTIES' including 'Person', 'Company', 'Company Location', 'Work Log', 'Task', and 'Resource Type'. The main content area is titled 'Company Settings' and contains the following fields:

- Company name:** A text input field containing 'Default Company'.
- Use Wiki:** A checked checkbox.
- Use Resources:** A checked checkbox.
- Use Billing:** A checked checkbox.
- Use Score Rules:** A checked checkbox.
- Suppressed email addresses:** A large text area for entering email addresses, with a note below it: '(seperate emails by comma or new line)'.
- Incoming Email Project:** A dropdown menu.
- New Logo:** A 'Browse...' button and the text 'No file selected.', with a note below it: '(250x50px should look good. The logo will be shown up top instead of the Jobsworth one, and on your login page.)'

A 'Save' button is located at the bottom of the form.

FIGURE 11.21: GENERAL

## 11.9.2 Score Rules

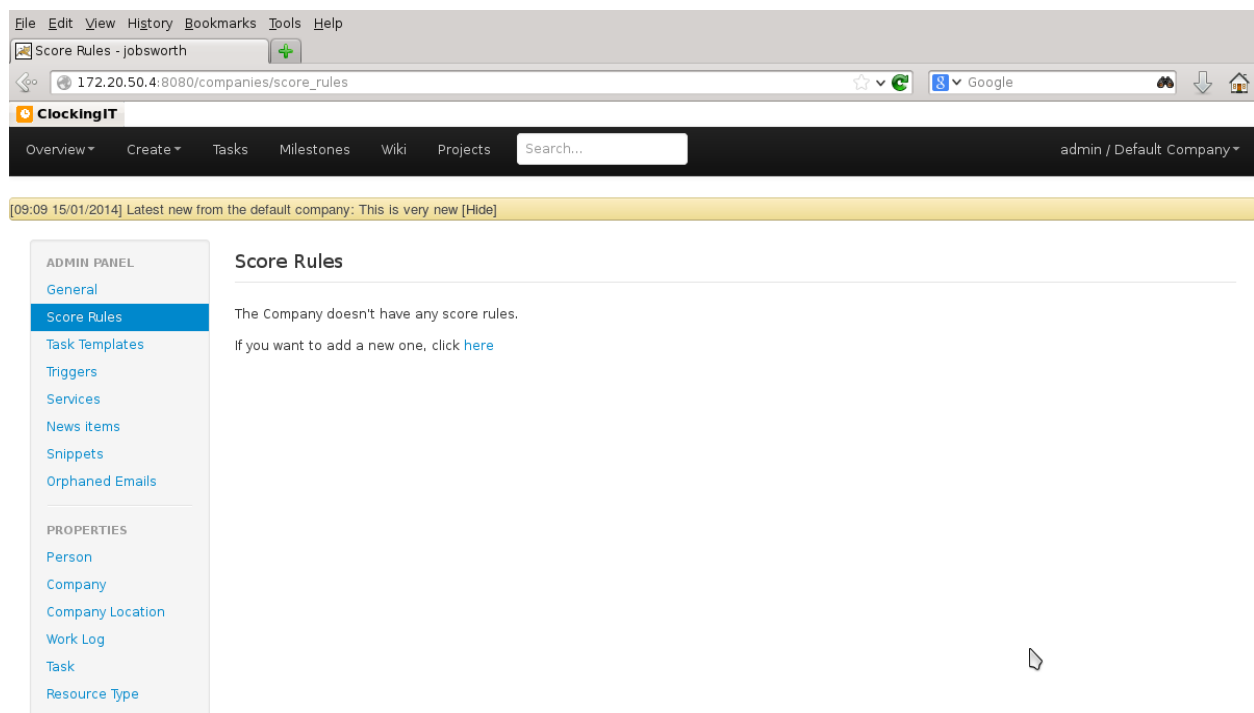


FIGURE 11.22: SCORE RULES

## 11.9.3 Task Templates

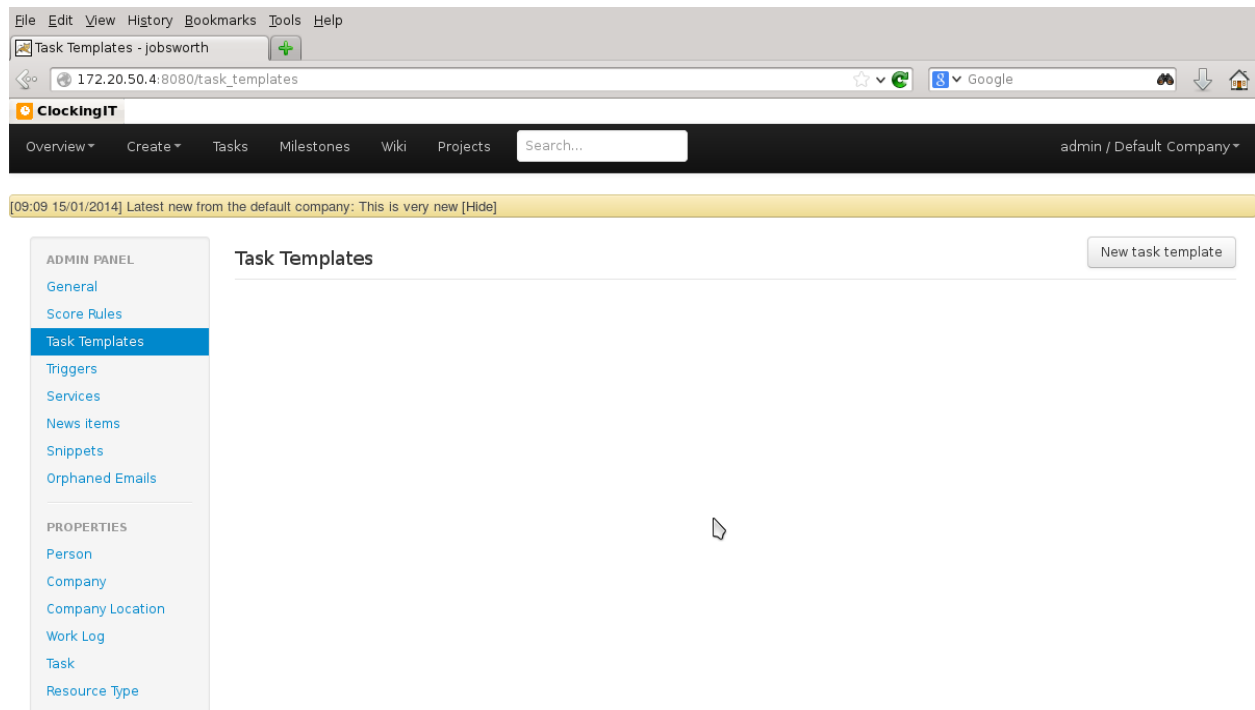


FIGURE 11.23: TASK TEMPLATES

File Edit View History Bookmarks Tools Help

New Task - jobsworth

172.20.50.4:8080/task\_templates/new

ClockingIT

Overview Create Tasks Milestones Wiki Projects Search...

admin / Default Company

[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]

Enter task name...

Add a todo item...

Project Please select

Milestone [None]

Time 1h (default)

Estimate

Target Date

Resolution Open

Save

Enter task description...

Attributes

Tags

Type Task

Priority Normal

Severity Normal

Service [None]

billable

Notifications

Companies

Users To Notify

admin

FILTERS

Open tasks

My open tasks

My unread tasks

testproject

TAGS

NEXT TASKS

FIGURE 11.24: NEW TASK TEMPLATE



## 11.9.4 Triggers

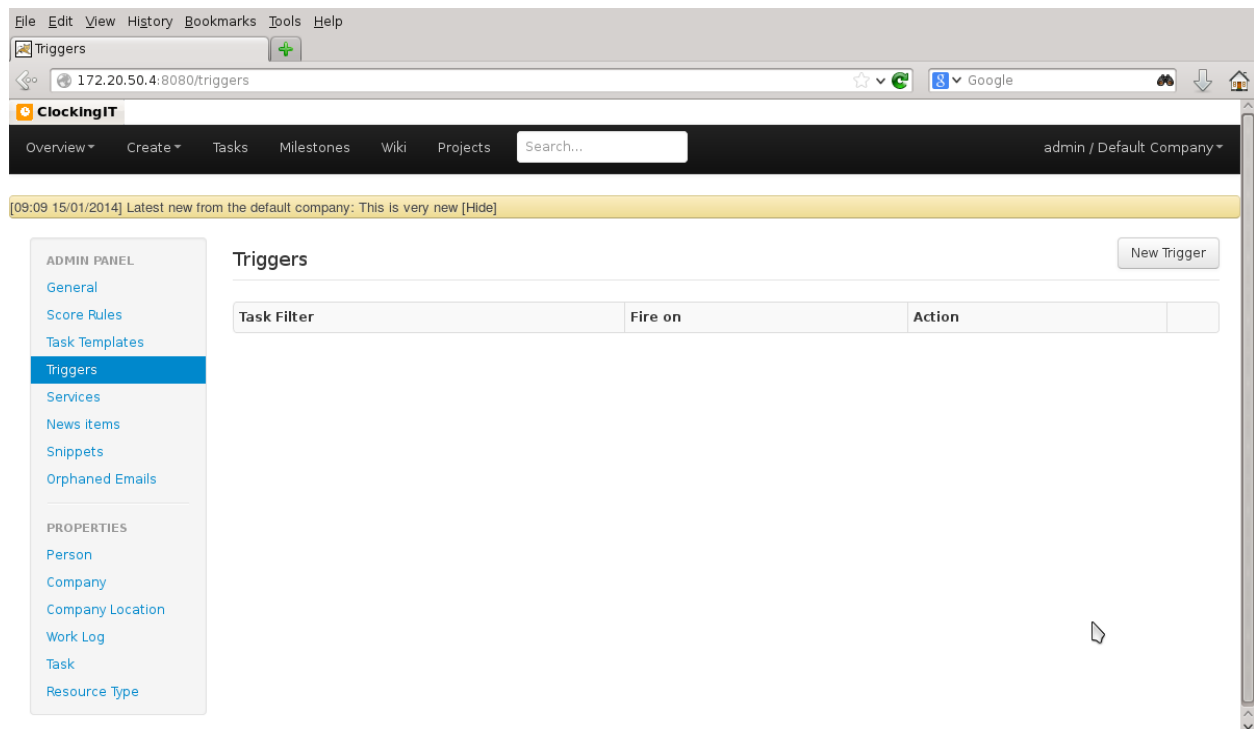


FIGURE 11.25: TRIGGERS

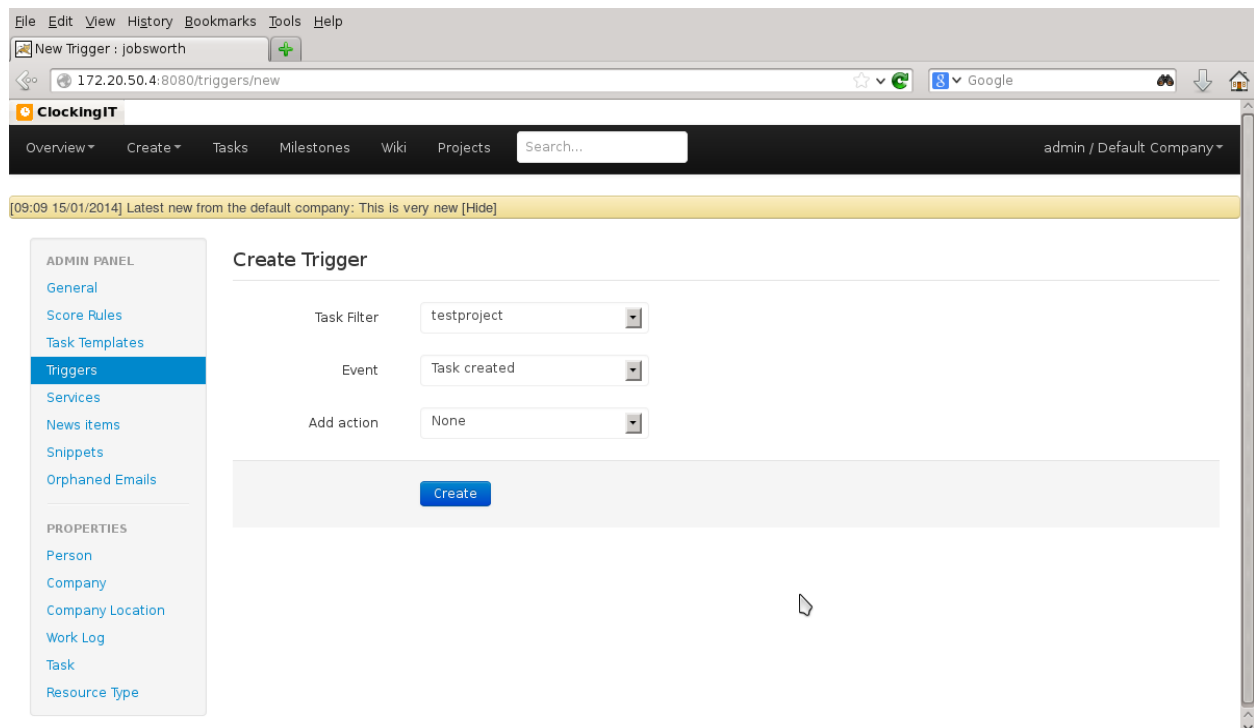


FIGURE 11.26: NEW TRIGGER

## 11.9.5 Services

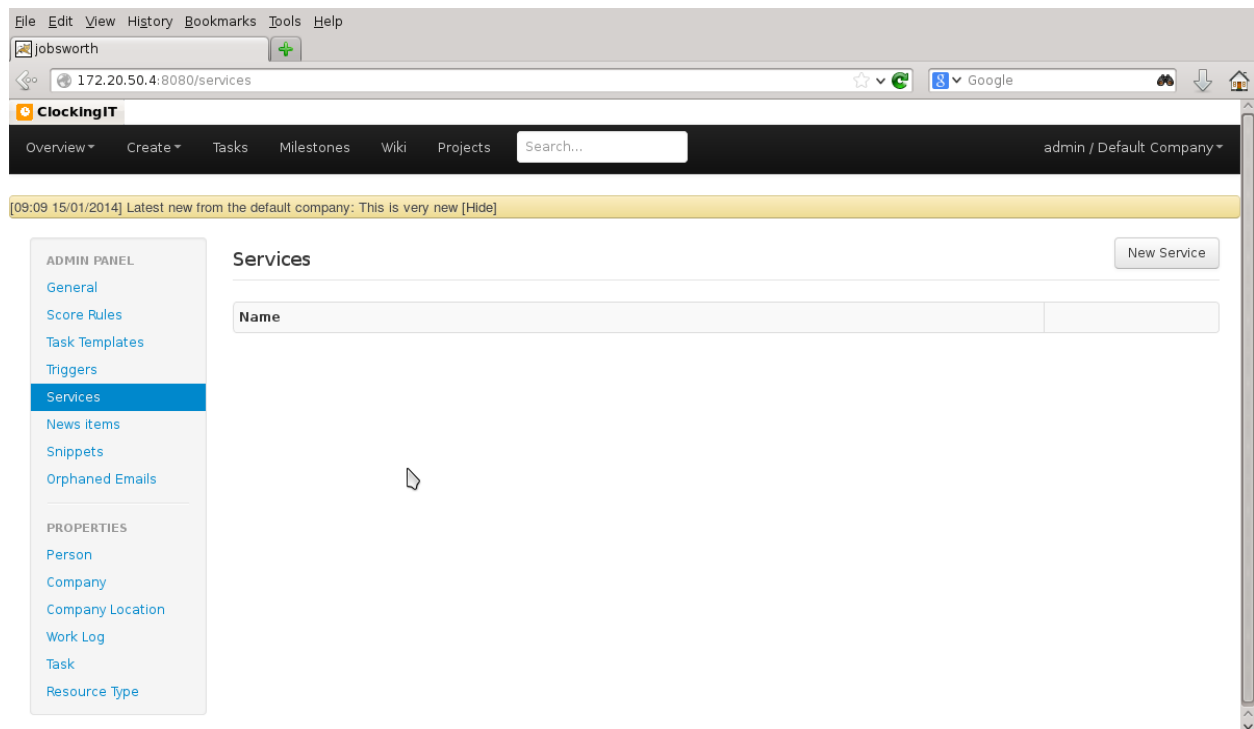


FIGURE 11.27: SERVICES

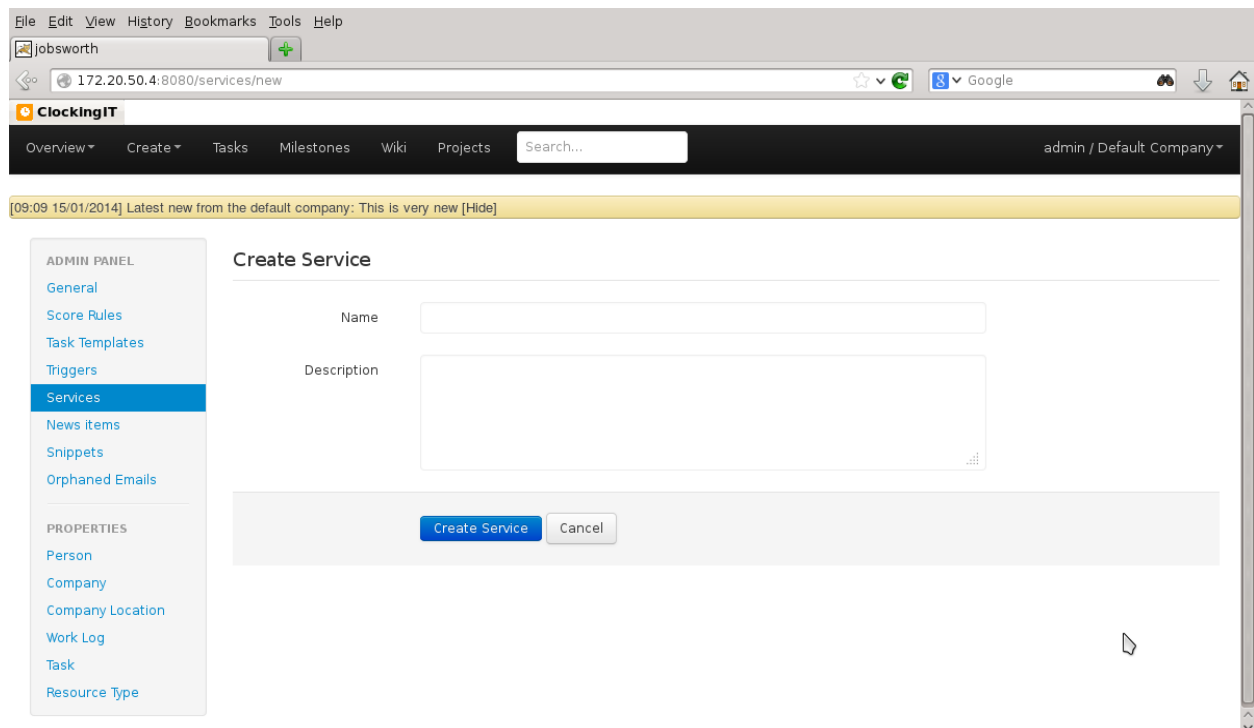


FIGURE 11.28: NEW SERVICE

## 11.9.6 News Items

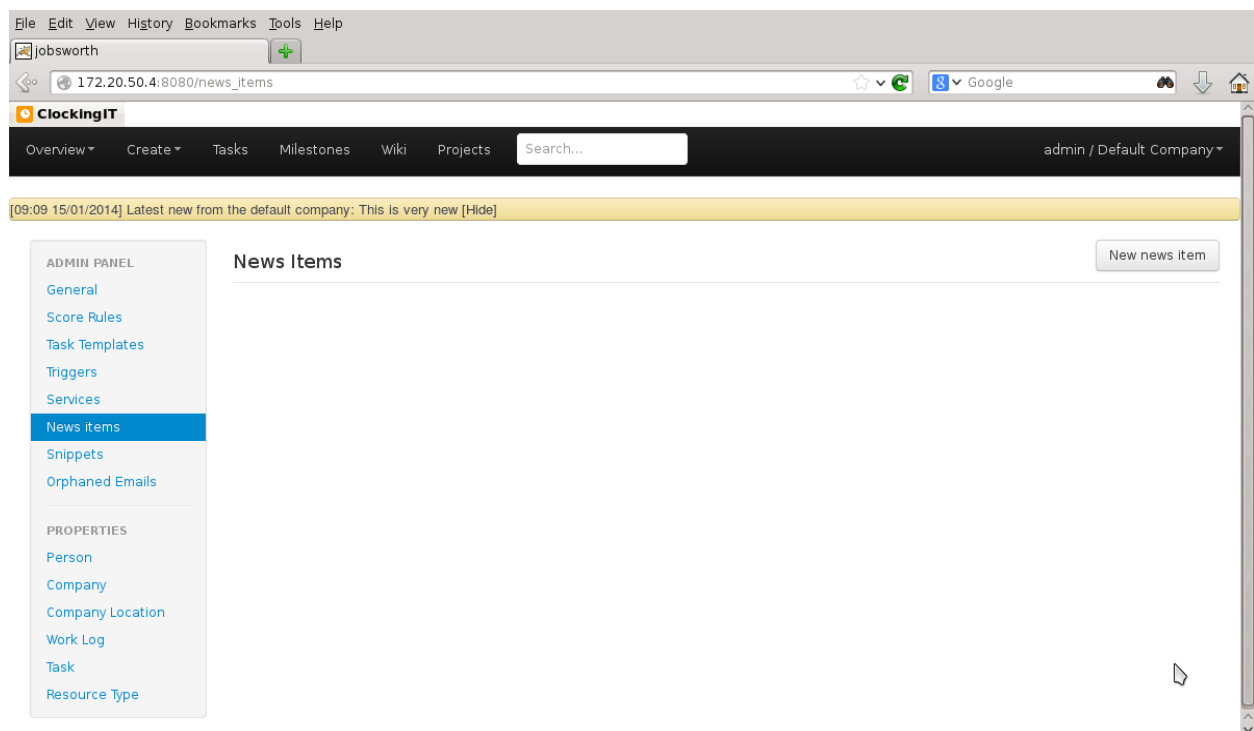
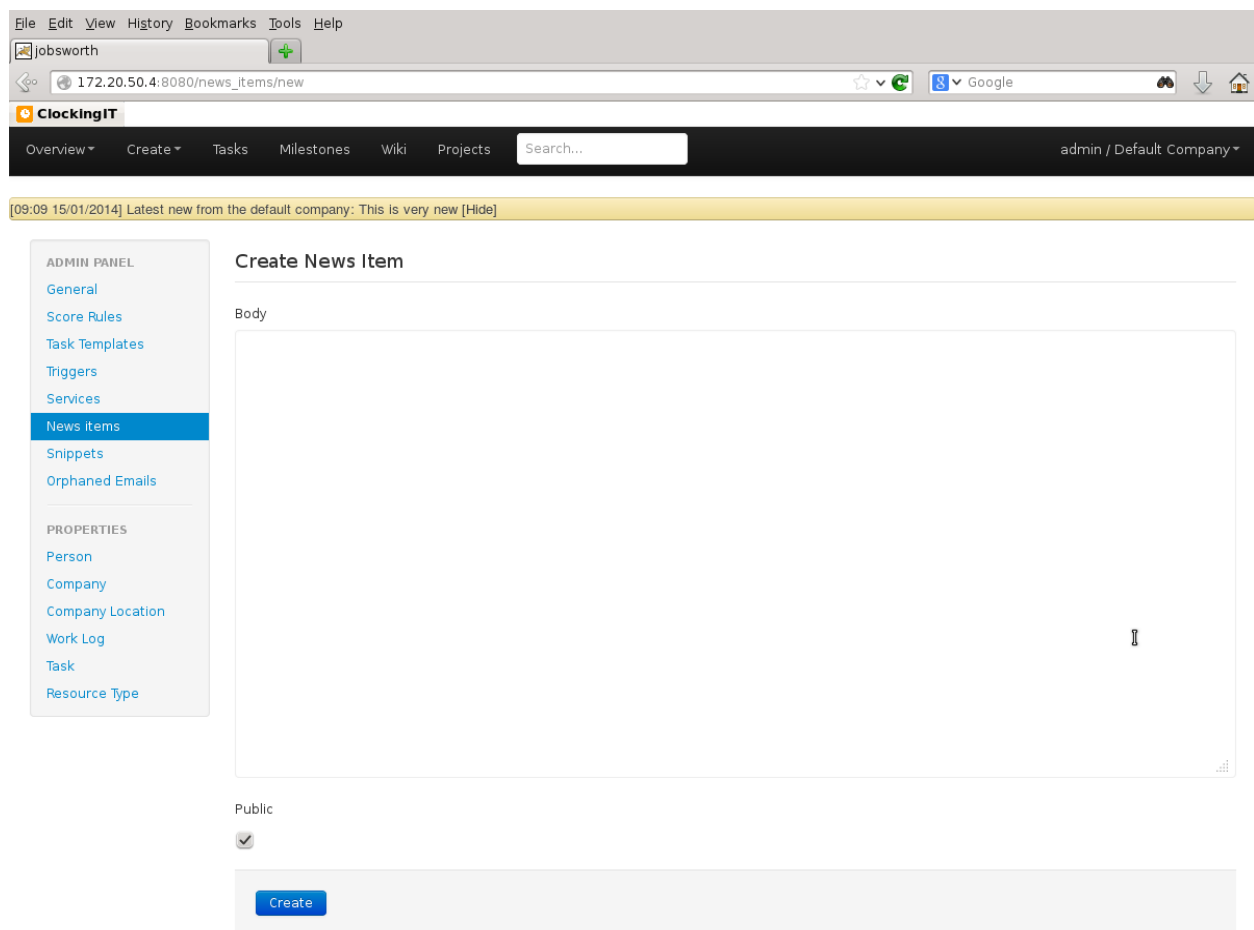


FIGURE 11.29: NEWS ITEMS



**FIGURE 11.30: CREATE NEWS ITEM**

# 11.9.7 Snippets

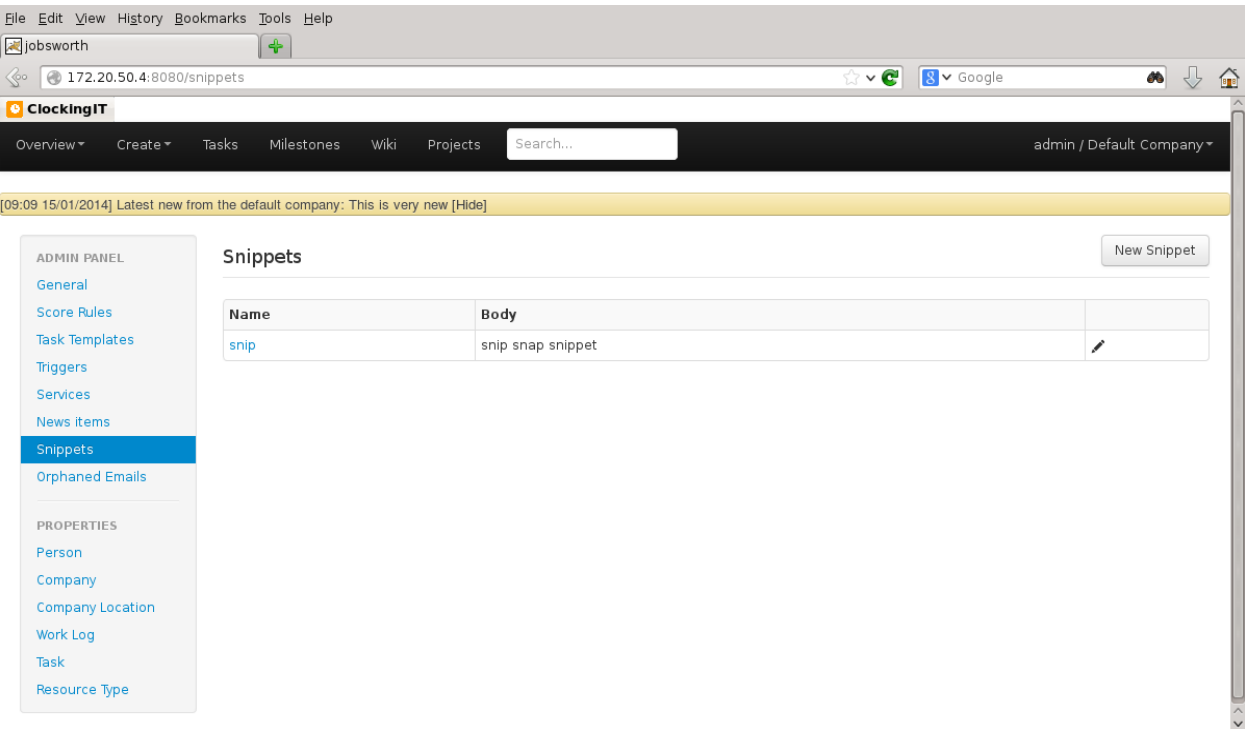


FIGURE 11.31: SNIPPETS

File Edit View History Bookmarks Tools Help

jobsworth

172.20.50.4:8080/snippets/new

ClockingIT

Overview Create Tasks Milestones Wiki Projects Search... admin / Default Company

[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]

ADMIN PANEL

- General
- Score Rules
- Task Templates
- Triggers
- Services
- News Items
- Snippets**
- Orphaned Emails

PROPERTIES

- Person
- Company
- Company Location
- Work Log
- Task
- Resource Type

### Create Snippet

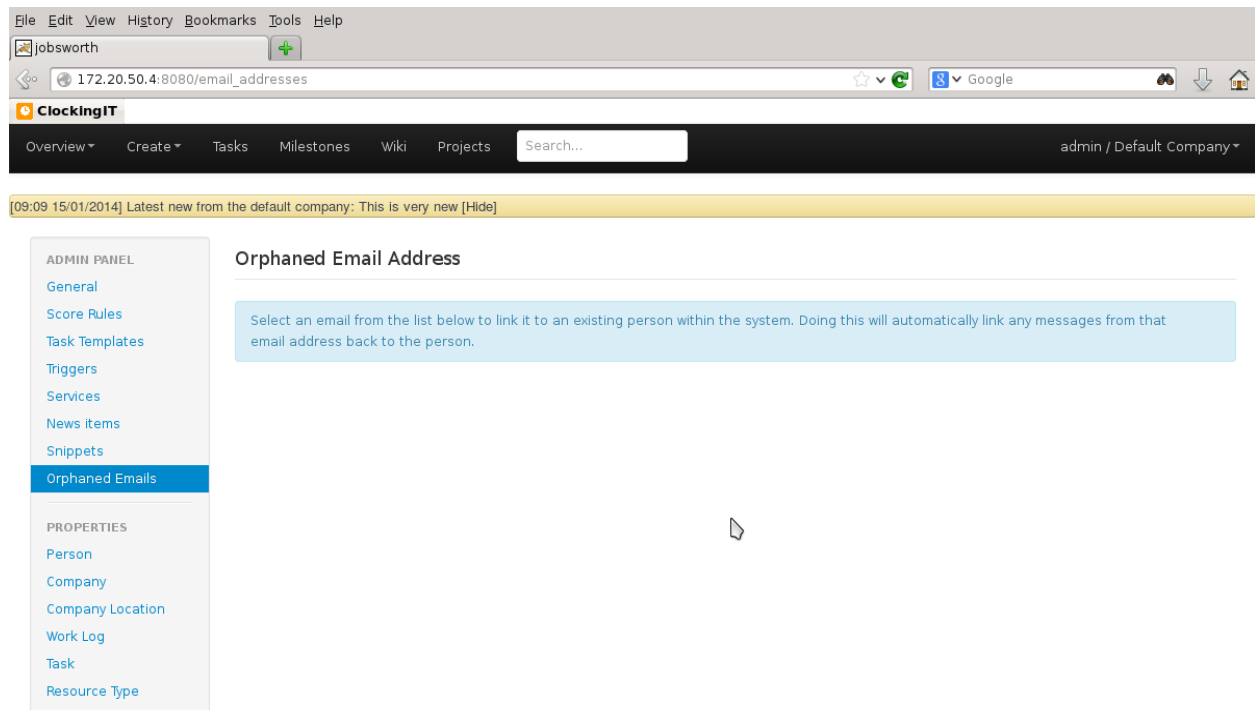
Name

Body

Create Snippet

FIGURE 11.32: CREATE SNIPPET

## 11.9.8 Orphaned E-Mails



**FIGURE 11.33: ORPHANED E-MAILS**

## 11.10 Company Properties

### 11.10.1 Person

The screenshot shows a web browser window with the address bar displaying `172.20.50.4:8080/custom_attributes/edit?type=User`. The page title is "Custom Attributes - jobsworth". The application header includes a navigation menu with "Overview", "Create", "Tasks", "Milestones", "Wiki", and "Projects", along with a search bar and a user/logout link "admin / Default Company". A yellow banner at the top of the main content area reads: "[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]".

The main content area is titled "User Properties" and contains a form with the following fields and controls:

- Name:** A text input field with a "Remove attribute" link to its right.
- LDAP Name:** A text input field.
- Mandatory:** A checkbox.
- Allows multiple:** A checkbox.
- Maximum field length:** A text input field.
- Use only preset choices:** A checkbox.

At the bottom of the form, there are two buttons: "Update" (in blue) and "Add another attribute" (in grey).

A left-hand sidebar menu is visible, categorized into "ADMIN PANEL" and "PROPERTIES". The "PROPERTIES" section includes links for "General", "Score Rules", "Task Templates", "Triggers", "Services", "News items", "Snippets", and "Orphaned Emails". The "PERSON" section is currently selected and highlighted in blue, containing links for "Person", "Company", "Company Location", "Work Log", "Task", and "Resource Type".

FIGURE 11.34: PERSON



## 11.10.2 Company

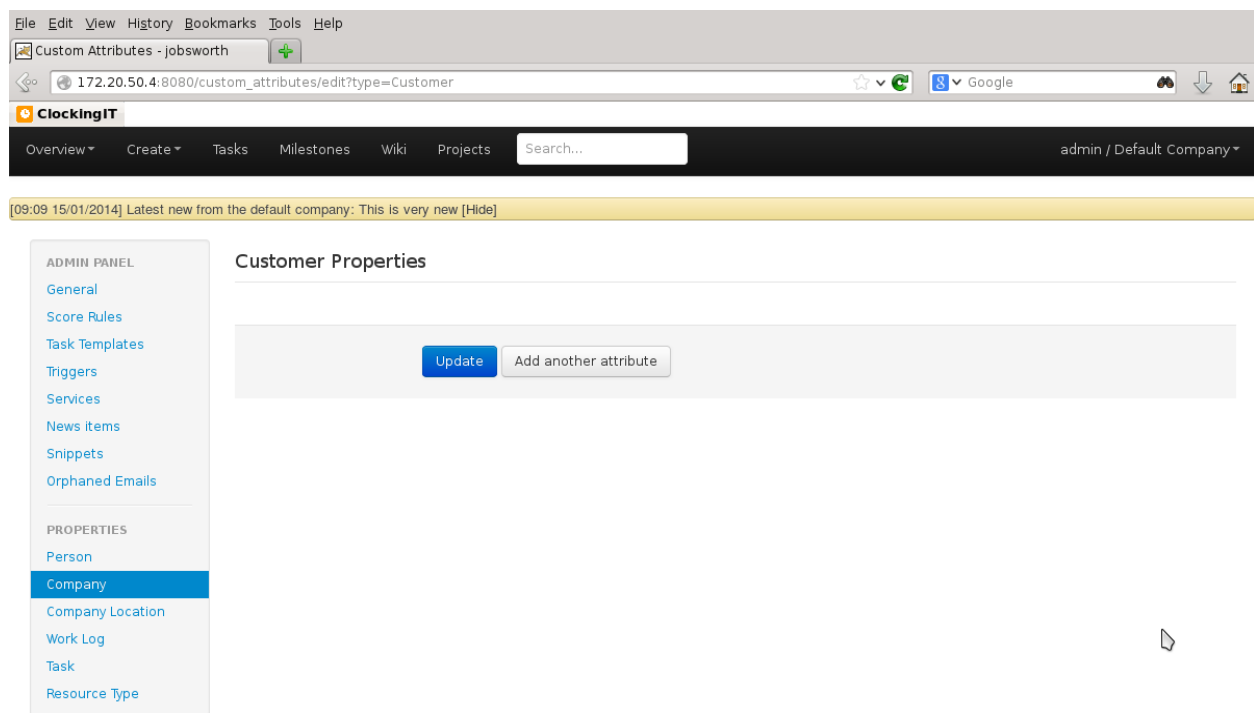


FIGURE 11.35: COMPANY

## 11.10.3 Company Location

The screenshot shows a web browser window with the URL `172.20.50.4:8080/custom_attributes/edit?type=OrganizationalUnit`. The page title is "Custom Attributes - jobsworth". The application header includes a menu with "Overview", "Create", "Tasks", "Milestones", "Wiki", and "Projects", along with a search bar and a user profile "admin / Default Company". A notification bar at the top states: "[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]".

The main content area is titled "Organizational Unit Properties". On the left is a sidebar menu with sections "ADMIN PANEL" and "PROPERTIES". Under "ADMIN PANEL", "Company Location" is selected. Under "PROPERTIES", "Person", "Company", "Work Log", "Task", and "Resource Type" are listed.

The "Organizational Unit Properties" form contains the following fields and controls:

- Name:** A text input field with a "Remove attribute" link next to it.
- LDAP Name:** A text input field.
- Mandatory:** A checkbox.
- Allows multiple:** A checkbox.
- Maximum field length:** A text input field.
- Use only preset choices:** A checkbox.

At the bottom of the form are two buttons: "Update" and "Add another attribute".

FIGURE 11.36: COMPANY LOCATION

## 11.10.4 Work Log

The screenshot shows a web browser window with the URL `172.20.50.4:8080/custom_attributes/edit?type=WorkLog`. The page title is "Custom Attributes - jobsworth". The navigation bar includes "Overview", "Create", "Tasks", "Milestones", "Wiki", "Projects", and a search bar. The user is logged in as "admin / Default Company". A status bar at the top shows the time "09:09 15/01/2014" and a message "Latest new from the default company: This is very new [Hide]".

The main content area is titled "Work Log Properties". It contains several form fields and checkboxes:

- Name:** A text input field with a "Remove attribute" link next to it.
- LDAP Name:** A text input field.
- Mandatory:** A checkbox.
- Allows multiple:** A checkbox.
- Maximum field length:** A text input field.
- Use only preset choices:** A checkbox.

At the bottom of the form, there are two buttons: "Update" and "Add another attribute".

The left sidebar contains a menu with the following items:

- ADMIN PANEL
  - General
  - Score Rules
  - Task Templates
  - Triggers
  - Services
  - News Items
  - Snippets
  - Orphaned Emails
- PROPERTIES
  - Person
  - Company
  - Company Location
  - Work Log**
  - Task
  - Resource Type

FIGURE 11.37: WORKLOG

## 11.10.5 Task Properties

File Edit View History Bookmarks Tools Help

jobsworth

172.20.50.4:8080/properties

ClockingIT

Overview Create Tasks Milestones Wiki Projects Search...

admin / Default Company

[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]

ADMIN PANEL

- General
- Score Rules
- Task Templates
- Triggers
- Services
- News Items
- Snippets
- Orphaned Emails

PROPERTIES

- Person
- Company
- Company Location
- Work Log
- Task
- Resource Type

### Task Properties

New task property

Name	Sort tasks by this property by default	Color tasks by this property by default		
Type			Edit	Delete
Priority	Yes	Yes	Edit	Delete
Severity	Yes		Edit	Delete

FIGURE 11.38: TASK PROPERTIES

## 11.10.6 Resource Type

The screenshot shows a web browser window with the URL `172.20.50.4:8080/resource_types`. The application is titled "ClockingIT" and has a navigation bar with links: Overview, Create, Tasks, Milestones, Wiki, Projects, and a search bar. The user is logged in as "admin / Default Company". A notification bar at the top states: "[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]".

On the left is an "ADMIN PANEL" with two sections:

- ADMIN PANEL**
  - General
  - Score Rules
  - Task Templates
  - Triggers
  - Services
  - News Items
  - Snippets
  - Orphaned Emails
- PROPERTIES**
  - Person
  - Company
  - Company Location
  - Work Log
  - Task
  - Resource Type**

The main content area is titled "Resource Types" and includes a "New resource type" button. It contains a table with the following data:

Name	Attributes		
room	0	<a href="#">Edit</a>	<a href="#">Delete</a>

FIGURE 11.39: RESOURCE TYPE

File Edit View History Bookmarks Tools Help

jobsworth

172.20.50.4:8080/resource\_types/new

ClockingIT

Overview Create Tasks Milestones Wiki Projects Search... admin / Default Company

[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]

ADMIN PANEL

- General
- Score Rules
- Task Templates
- Triggers
- Services
- News items
- Snippets
- Orphaned Emails

PROPERTIES

- Person
- Company
- Company Location
- Work Log
- Task
- Resource Type

### Create Resource Type

Name

#### Attributes

Name	<input type="text"/>	<a href="#">Remove attribute</a>
Mandatory	<input type="checkbox"/>	
This attribute is a password	<input type="checkbox"/>	
Allows Multiple	<input type="checkbox"/>	
Validation Regex	<input type="text"/>	
Default field length	<input type="text"/>	

[Create](#) [Add another attribute](#)

FIGURE 11.40: CREATE RESOURCE TYPE

# 12 Widgets

## 12.1 Filters

You will find the filter widget on many screens. It allows you to filter displayed content and therefore only show relevant information. Just select one of the predefined filters and it will appear within the task search widget (for more information see [Section 12.2.4, “Task Search”](#) ).

## 12.2 Tasks

### 12.2.1 Newest Tasks

### 12.2.2 Next Tasks

### 12.2.3 Top Tasks

### 12.2.4 Task Search

## 12.3 Tags

## 13 Workflow