Orangescrum Community Edition Documentation

Create a new "Task":
(Create a New fully informative, detailed Task in just 5 steps)

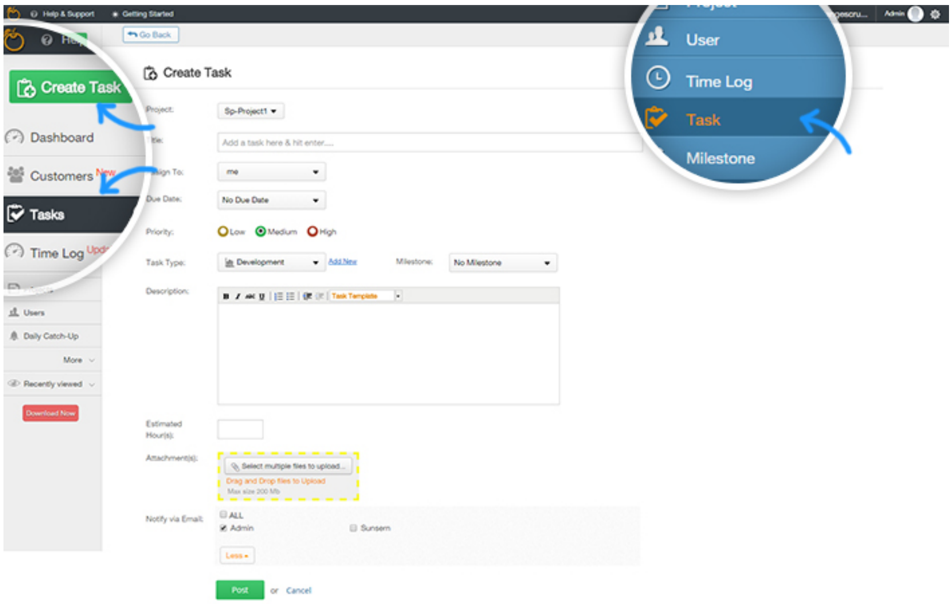


Figure1

On The "Main Screen" In The Header, You Will See The Button Create Task Or the fourth option inside the Menu New towards the top right hand side. See them "Circled in Blue"

- Click on " Create Task " button or click Task from " New " menu. This will open up "Create Task Page" as shown in Figure1. Enter Title of the task.
- By default, current project selected in project list box, you can always choose/ create a different/new project. Then choose Task Type, Priority and Assigned to from the respective list box.
- Select multiple files from your computer and attach to send.

To create a detailed task:

- To Create a detailed Task use the options (circled in Blue as shown below in Figure 2) – Description, Number of hours Spent, Attachments

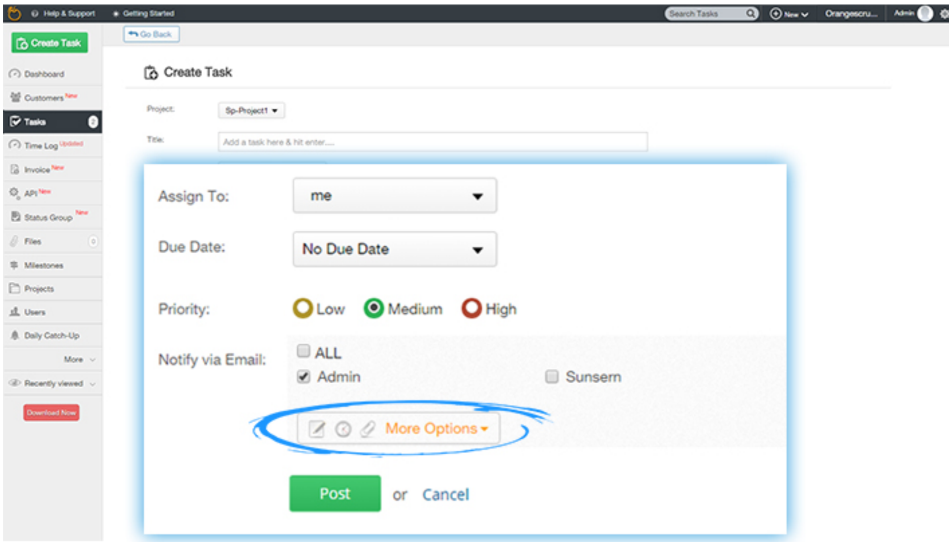


Figure2

- Clicking the Tab will stretch the page to show the entries as shown below in Figure 3:

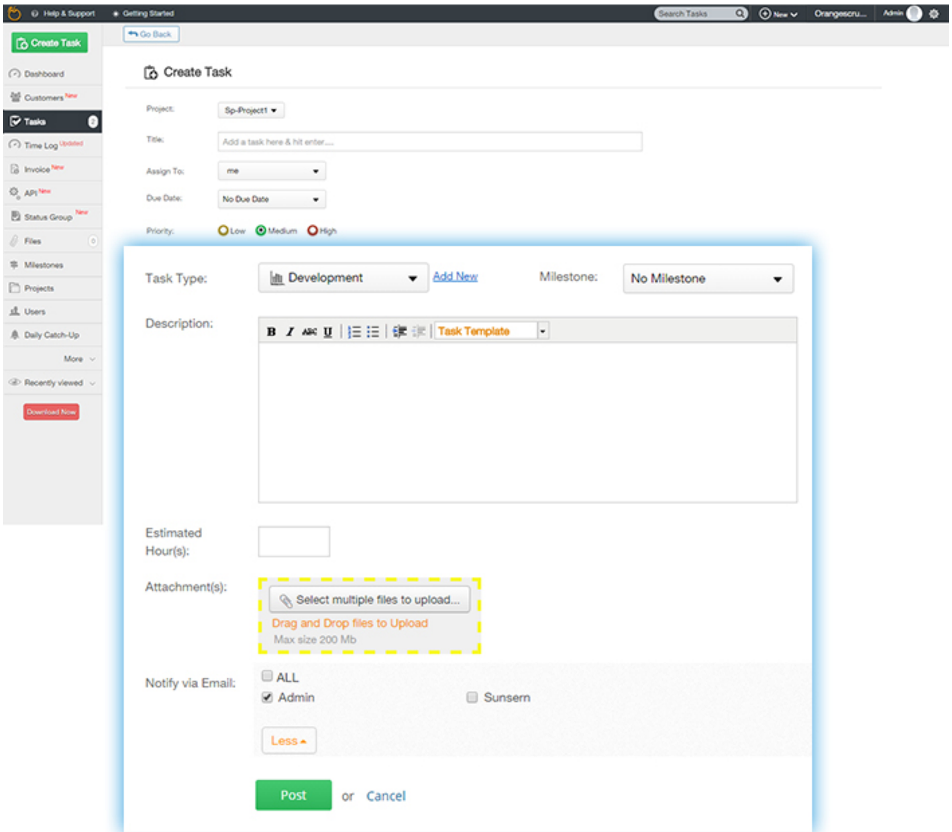


Figure3

- Task Type – You can add a custom Task by clicking "Add New"
- Milestone – You can create a New Milestone by simply clicking the option in the Tab as shown In Figure 4

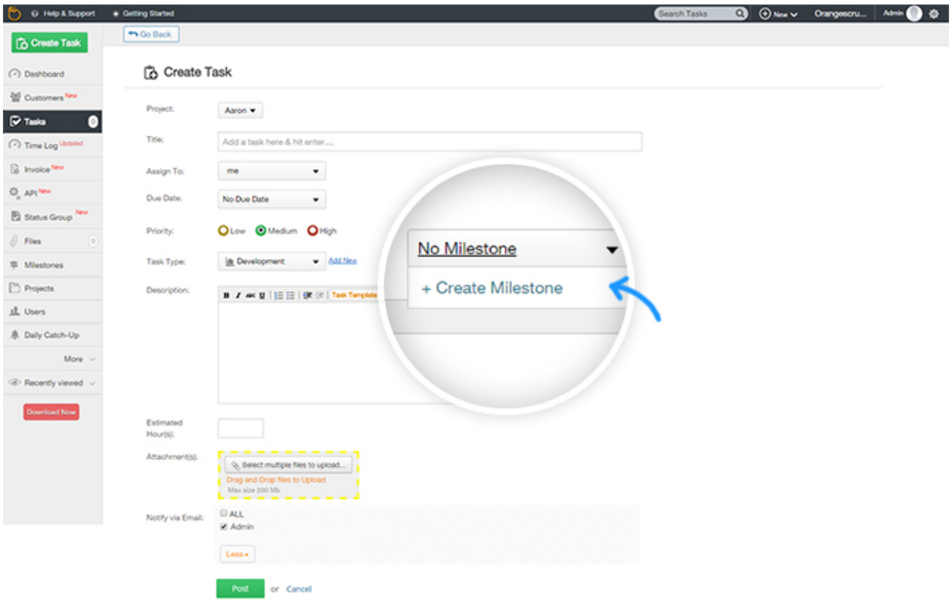
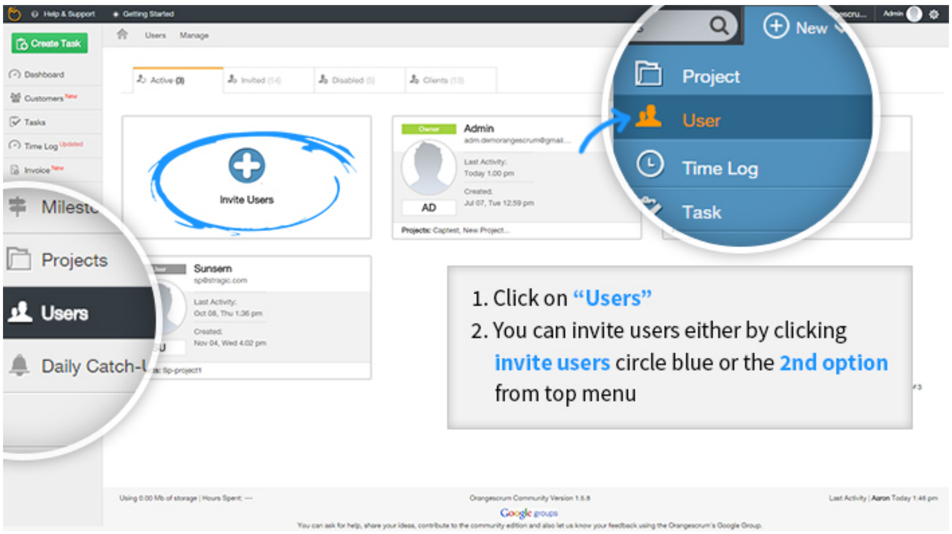


Figure4

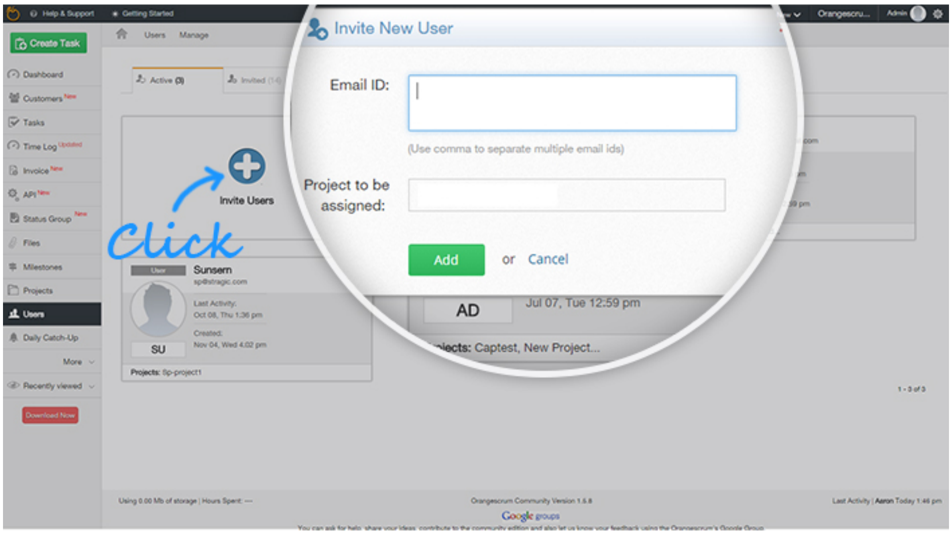
- Enter your Task Description, Estimated hours
- Attach your files if any. Click on Notify via Email
- Click  to create a "NEW TASK"

How to invite new users:



Question: How to Invite New Users to OrangeScrum?

- You can simply do this by Clicking on  Button on the bottom Left hand side of the screen in the Panel and then clicking on the  button
- Or By clicking  drop down Menu located at the top right hand corner of the screen in the header and the Second Sub option.
- When the Option is clicked "Invite New User" window will appear as shown below:



- Now simply enter Email ID of the Users to wish to Invite to a project separated by "Comma"
- Enter or type the name of the Project to select a project of your choice.
- Hit Add and you've "Invited A New User".

How to log time:

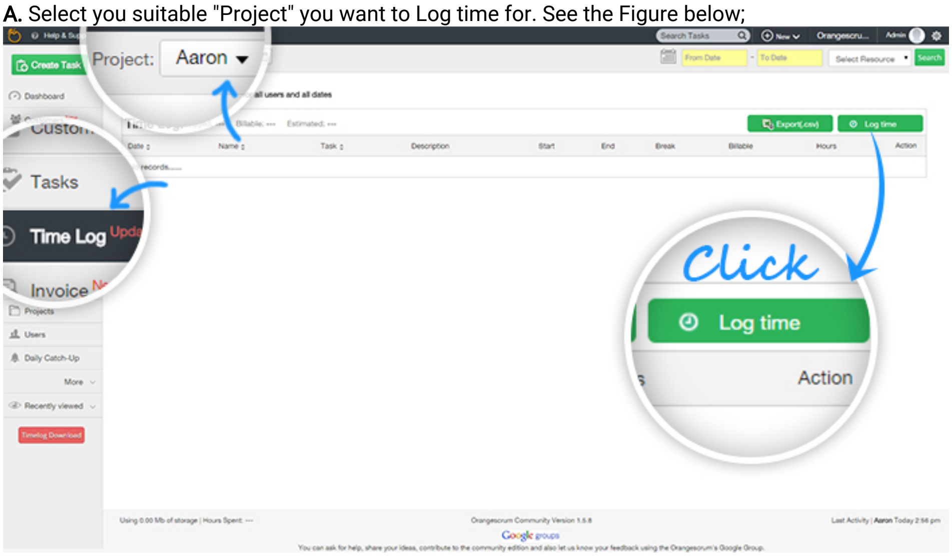
Question: How to "Log Time" using OrangeScrum?

Introduction: A "Time Log" is a smart way to track where user is spending time. You will also able to generate the invoice from the time log history, which is coming soon as add on.

This can be done in two ways. Here’s how you do them;

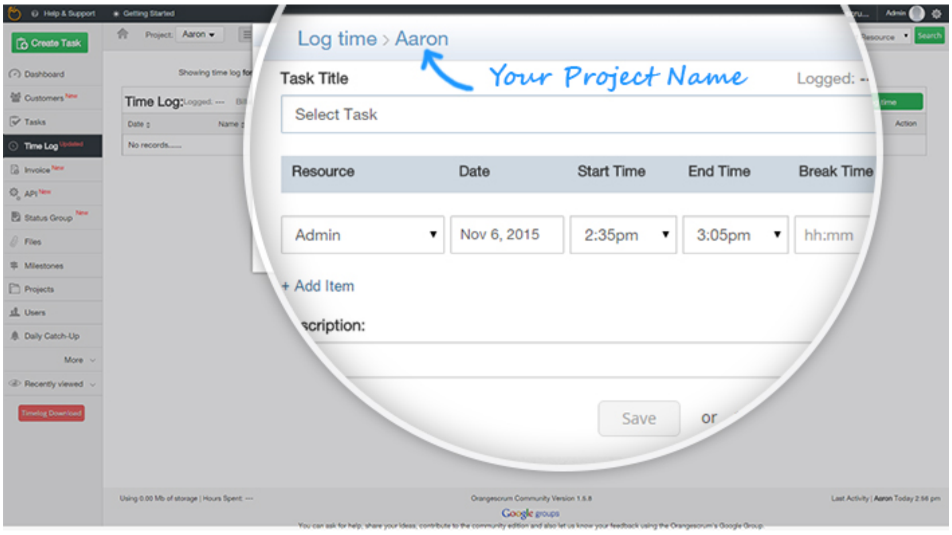
FIRST METHOD

A. Select you suitable "Project" you want to Log time for. See the Figure below;



B. When you click 

button, it will open the LogTime> (Your project name) window. See the figure below for a quick reference;



C. Select "Task Title" from task list.

D. Select "Resource" Name from list and pick Date from calendar.

E. Select "Start time" and "End time" from list.

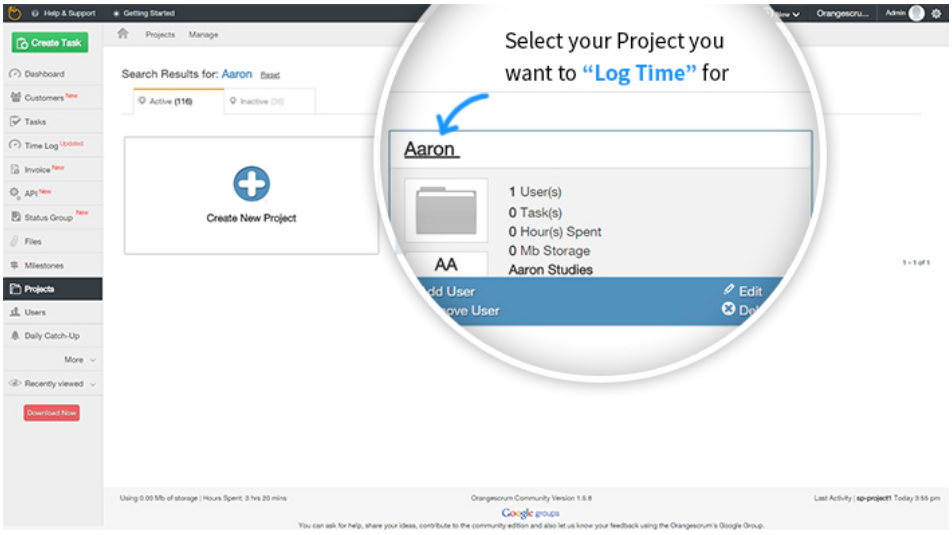
F. Enter "Break time". Spent Hours will be calculated automatically.

G. By Default billable field is checked, you can always uncheck in case non-billable hours.

H. Click on "+ Add Item", if you want to log more hours for a different resource or same resource different date or different time.

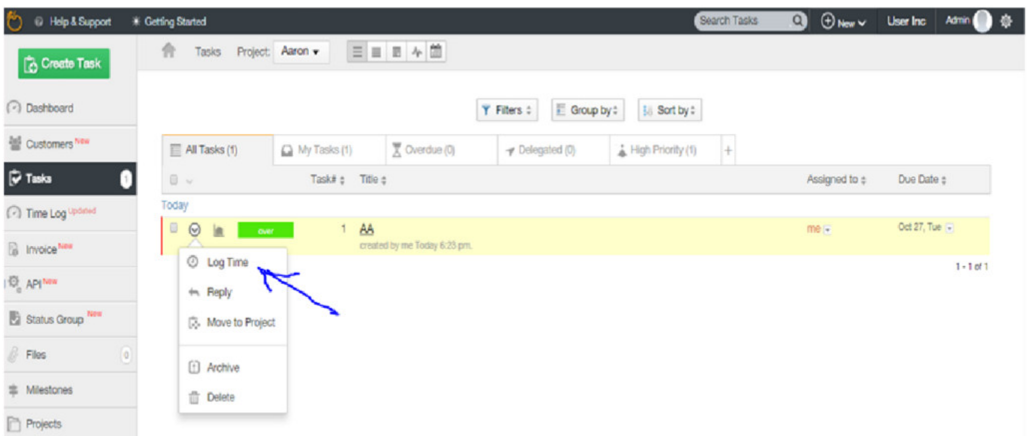
I. Enter “Description”

SECOND METHOD



A. Click on the "" button located on the Panel towards the left hand side of the screen.

B. Select a "Project"



C. Now repeat steps C to I from the "FIRST METHOD" to log time.

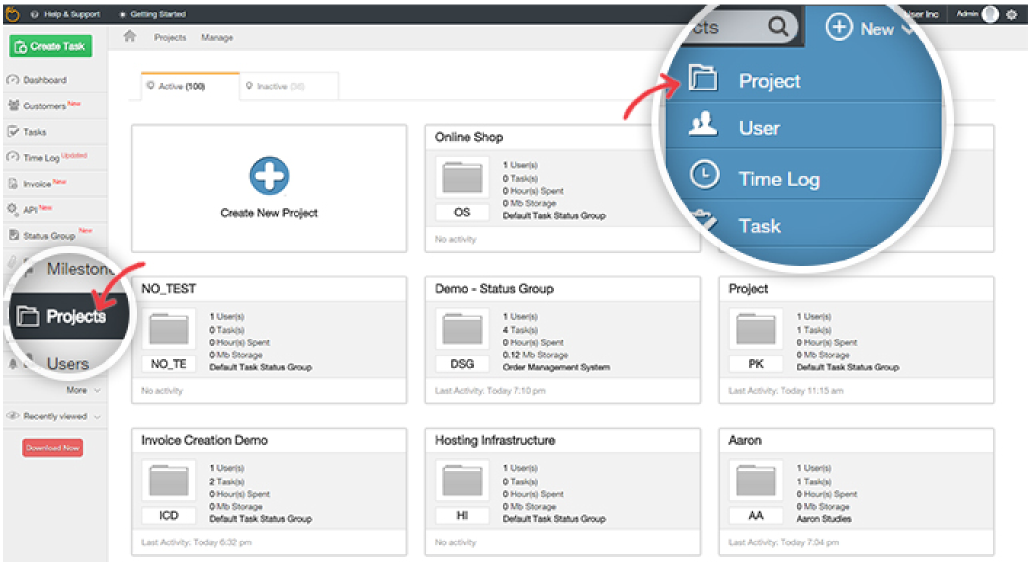
Request for Time Log Add-on
Click Here To Know More

How to "Create a Project"

Question: How do I "Create New Project" and where all is the "Create New Project" option located?

Please refer to Figure 1 **as shown below;**

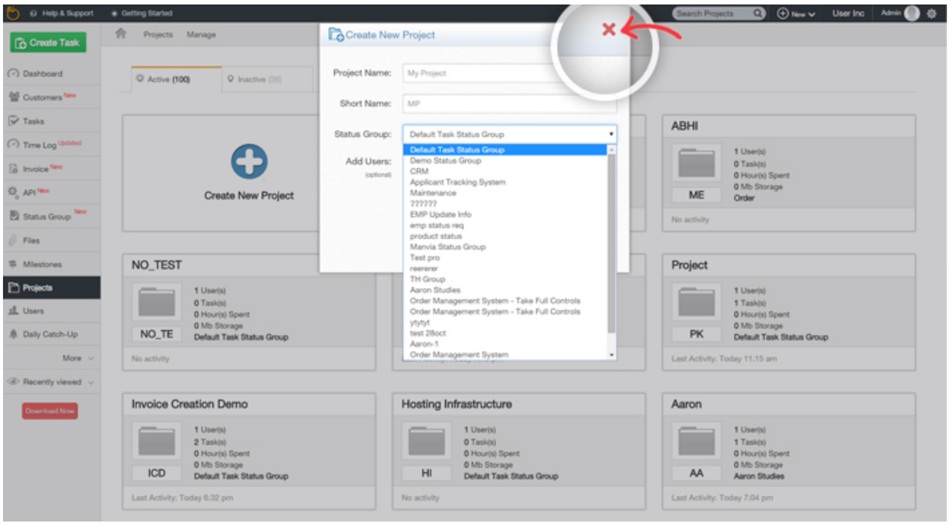
Figure 1



You can "Create New Project" from the two buttons as marked in Figure 1

To Create New Project;

- Go to "  "Menu present on the top right hand side of the screen. Click on "**Project**" sub menu to create a new project.
- OR click "  "button on the left hand side of the screen in the Panel and Click on  on the main screen.
- "**Project**" page has various input fields.
- The input fields are:
    - Project Name
    - Short Name
    - Status Group
    - Add Users



- You need to enter a suitable "Project Name", a "Short Name" for the project, "Add Users" by entering their mail ids separated by a comma.
- For eg: Project Name - My Project; Short Name- MP ; Add User usermp@gmail.com, usermp2@gmail.com, Status Group – Set to default but you can choose your own as shown in the figure above.
  - The form has "**Create**" button and "**Cancel**" link
  - Clicking "**Create**" button will create a new project. Clicking "**Cancel**" will cancel the form and no changes will be saved in the database.
  - A "**x**" button is present on top right hand side of the form.
  - Clicking "**x**" will close the form.

How to Create A Milestone

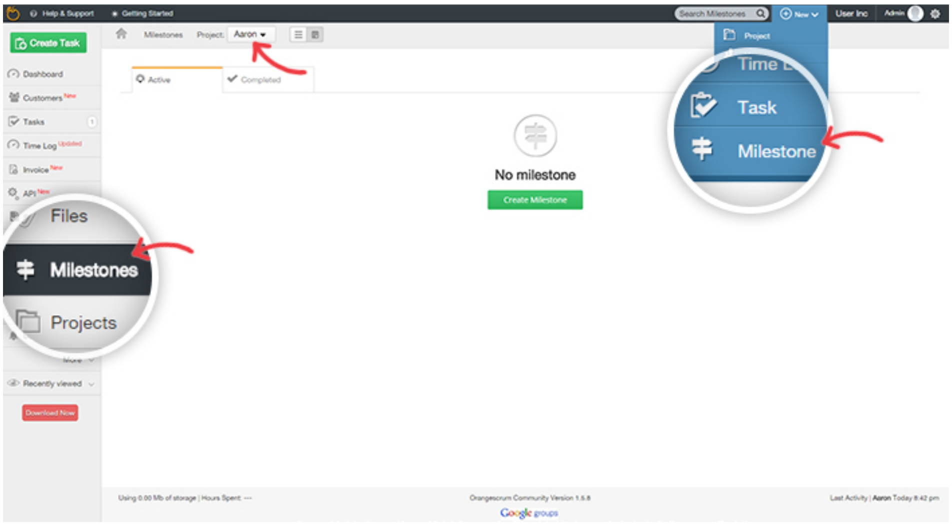
Question: How to "**Create A Milestone**" and How all can we do that?

Introduction:- A Milestone is a very important feature in managing projects. It is used to develop more accountability by time limiting you and creating a deadline for your tasks and projects.

A Milestone can be created in two ways. Here's how you do it –

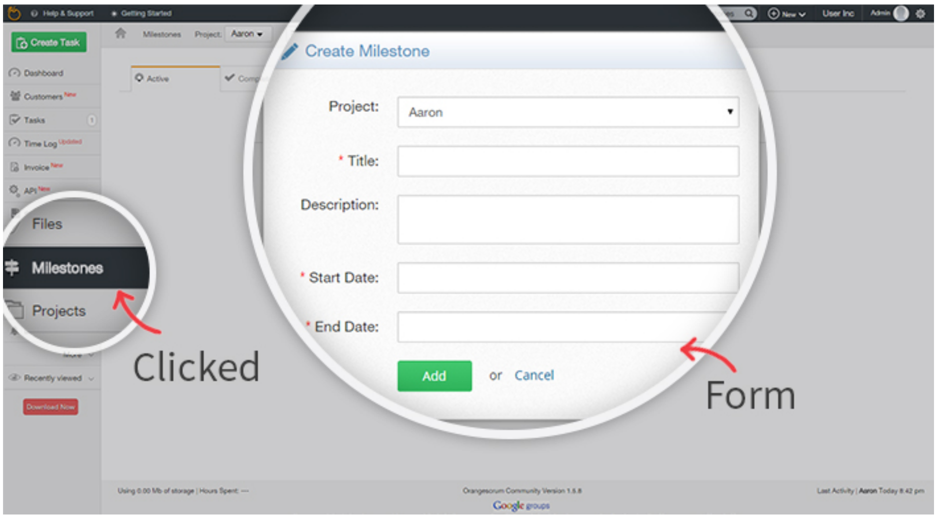
FIRST:

Figure 1



- As seen in Figure 1, you can either Click the " Milestones " button on the bottom left hand side of the screen or use the " New " drop down menu on the top right hand side of the screen, and the fifth Sub option there under.
- So, when you click the " Create Milestone "button in Figure 1, it will open up the "Create Milestone" form

with various field to fill up. Please refer to the Figure below:

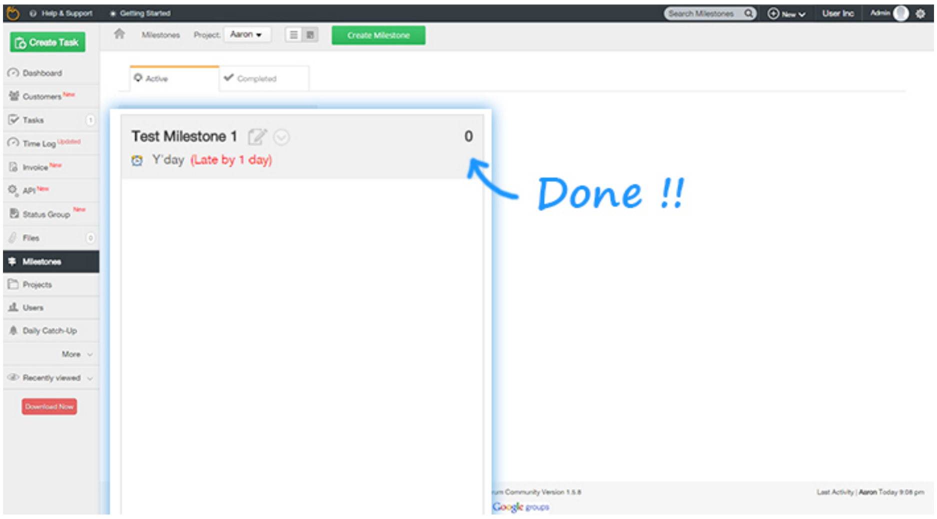


The fields to be filled up are:

- Project
- Title
- Description
- Start date
- End Date

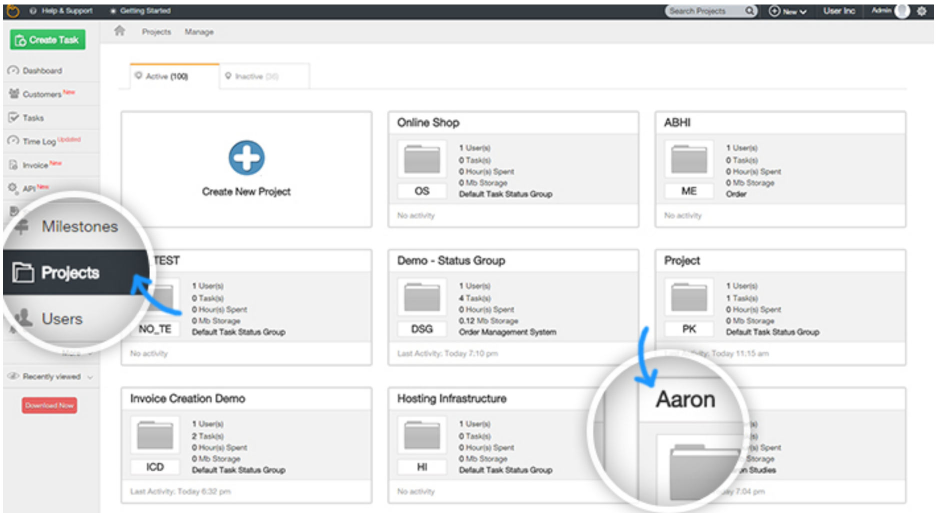
When the Form has been Filled up, Hit" Add " button on the form.

- As a result the Milestone will be created of your Project. See the example screenshot below:

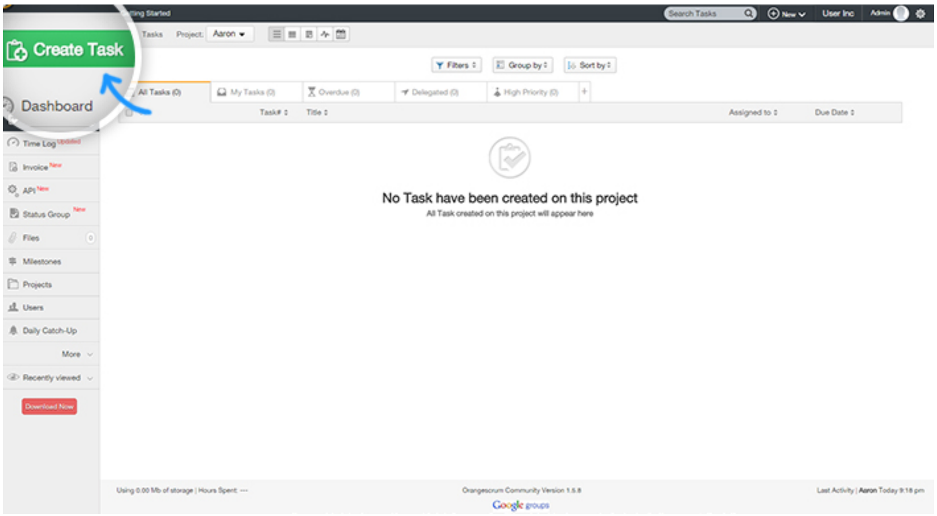


SECOND:

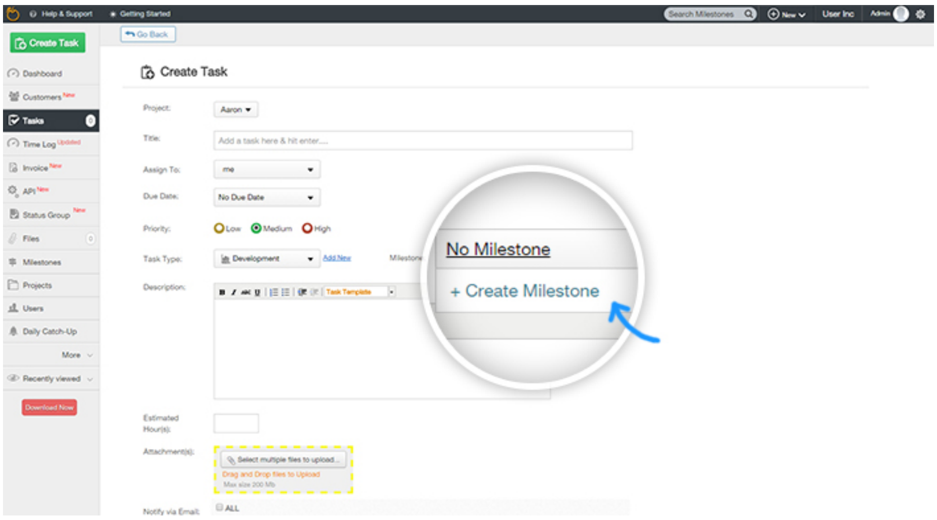
- Navigate to "**Projects**" on the Left hand side of the screen in the Panel. Click on it.
- Choose your project; See example screen shot below:



- When you click on the Title, with no existing Tasks to the Project; the following screen will appear

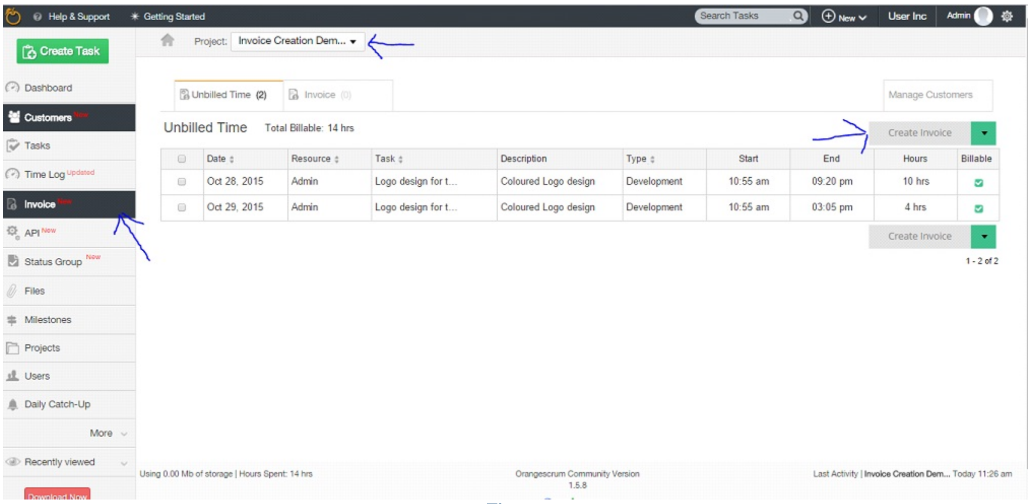


- Now Click on "Create Task" to create a new Task in the "Project". This will Open up the “Create Task” page where you can Create a "Milestone. See the Figure below;



- You can now easily create a "Milestone" for your "Project"

How to create an invoice



Figure

Introduction: What is an "Invoice" feature for? What all is it used for and its benefits?

An "Invoice" is a document that is issued by a "Seller" to the "Buyer". An invoice indicates the quantities and costs of the goods or services rendered. Simply put, it is a "Bill"; a list of goods sent or services provided, with a statement of the sum due for these.

What all is it used for and its benefits?

- You want to send an estimate to your client to close the sale.
- Create invoices easily and save it for your future reference or email it to your clients directly to present better clarity of your tasks or projects
- Clarity on tasks associated with billable hours, description, resource details with the start and end time. Absolute clarity with the client
- The Invoice feature makes it absolutely easy to "Add" a customer, view the details of the customer or you want to manage customer's details.
- OrangeScrum's invoicing feature is easy to use. It binds with your projects and tasks giving absolute clarity, helping you to craft your invoice with respect to the tasks

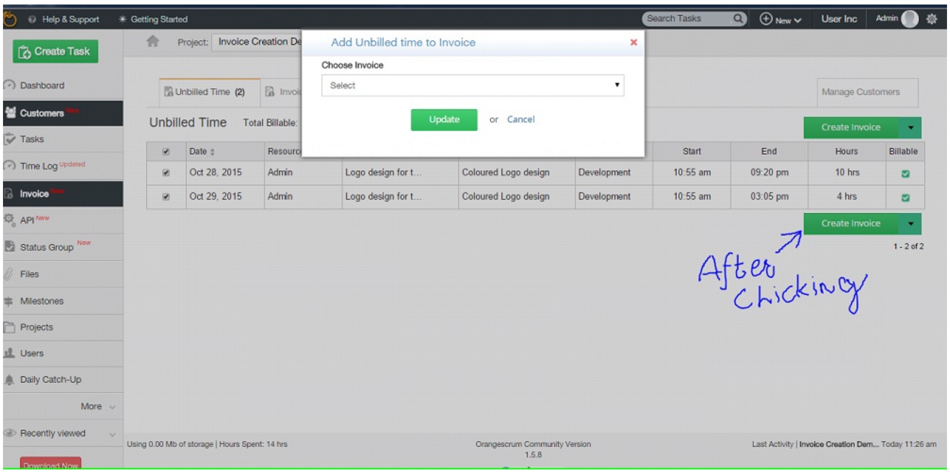
Request for Invoice Add-on
Click Here To Know More

So, LET'S GET STRATED - HOW TO CREATE AN "INVOICE"

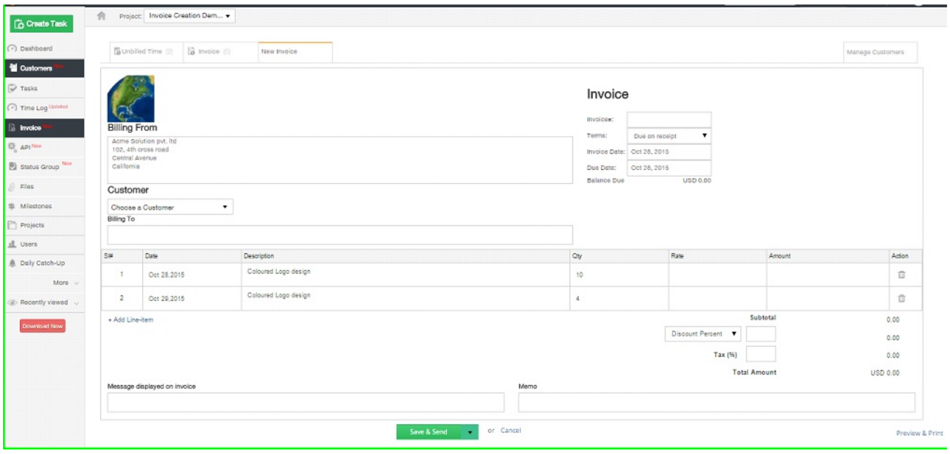
- Click on the "Invoice" button present on the panel on Left hand side of the screen.
- The screen will now show all the "Unbilled time". In Figure 1, we have 2 entries.
- "Tick mark the box" in front of the entries; and click on "Create Invoice" button to create an invoice. See Figure 2

Figure

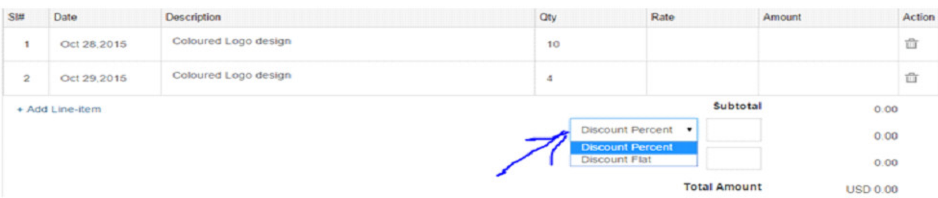
- When you click on "Create Invoice" button, a window will pop up to select either to create a new invoice or add it to existing invoice. Then click on "Update" button. See Figure 3 below;



- After Clicking "Update", it will redirect you to the page where you can create an "Invoice"; Look at Figure 4 below to see how the page will look like;



- You have to enter the "Invoice number" which should be "ALPHA NUMERIC" & it is Mandatory. Then proceed on to fill up the next fields – "Terms" is the number of days to pay the bill. According to the term selected, it changes the due date by which customer has to pay the bill. User can also manually change the due date.
- Then pick up an invoice date. It is the date for which invoice has been created.
- Then provide the billing from address. This is the address of the company who is creating the invoice.
- Then select one customer form the customers drop down list. You can also add customer by selecting "+ Add new customer option".
- Then provide the billing to address which is the address of the customer.
- Then in line item pick a date for which date invoice is created.
- Provide the description
- Then enter the quantity. Here quantity refers to the hour(s) spent on that particular item.
- Then enter rate, which is the unit price per hour.
- If you want to add more line item, you can do so by clicking on "+ Add line-item" button
- Select the discount mode whether percent or flat and enter discount amount; See Figure 5 Below;



- Then enter "tax amount" in percentage

- You can "also upload your company logo" at the top left hand side of the page. The logo must be smaller than 2MB in size. For the first time while creating invoice, if company logo is present it will be shown otherwise it will display no image. While editing image if there is no image for that company it will be stored as company logo. Otherwise it will be stored as that invoice logo
- Click on "Save & Send" button to save invoice and send email to customer.
- Click on "Save & Download" button to save invoice and download it as "PDF".
- Click on "Save and Close" button to save invoice and go to invoice list page
- Click on "Save and New" button to save invoice and create another invoice

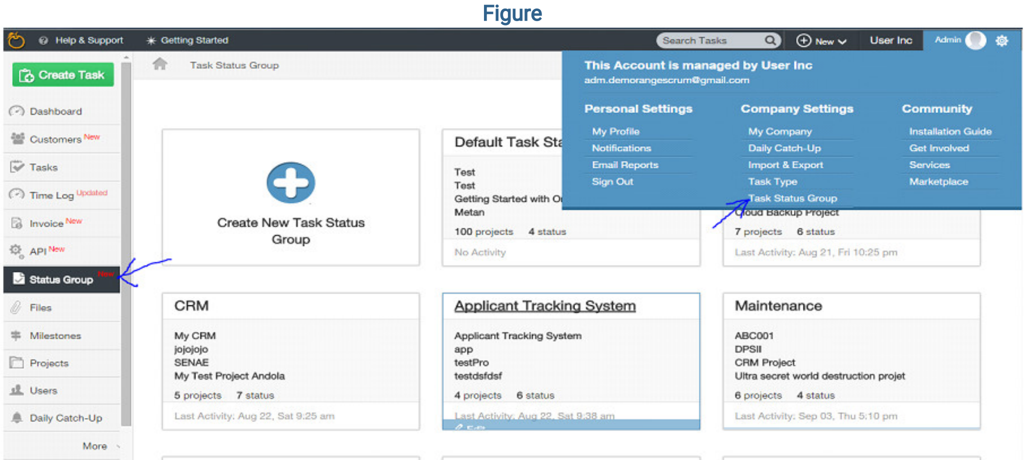
Request for Invoice Add-on
Click Here To Know More

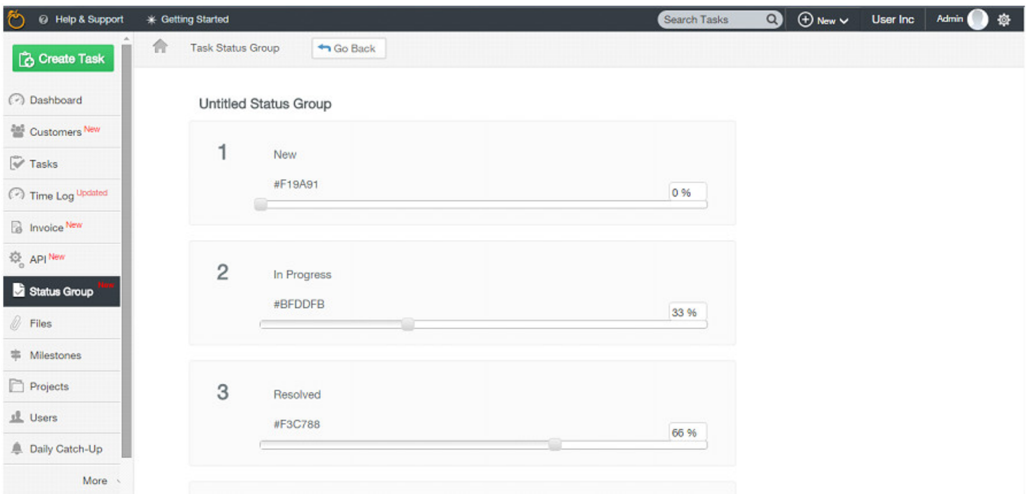
How to use the all new and amazing "Task Status Group"

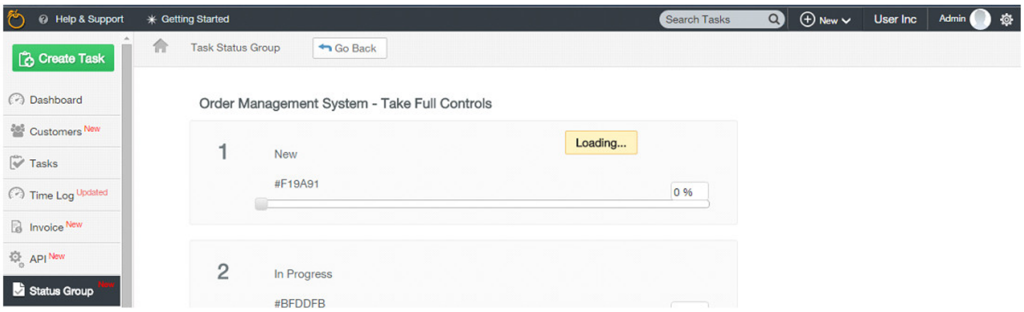
Now with this feature you can create your group with different status, % completion once status change from one to another. You can build your own CRM, Order management system, Applicant Tracking System (ATS) etc. using this. Take a look into OrangeScrum DEMO. You will love it.

Here are some Snap shots for your reference;

Figure







So, What the All new and amazing Task Group Status Add-on does?

With the new Task Status Group feature you can easily define each **"Task Group"** you create in a project with clear status and conditions. Every single task group will have a **dedicated status** according to your **project requirements.**

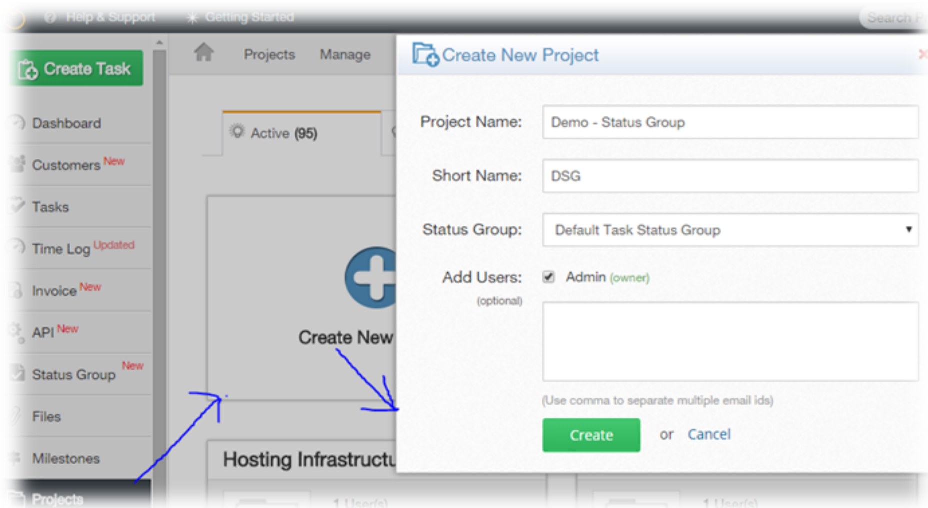
Summarizing the features, which are as follows;

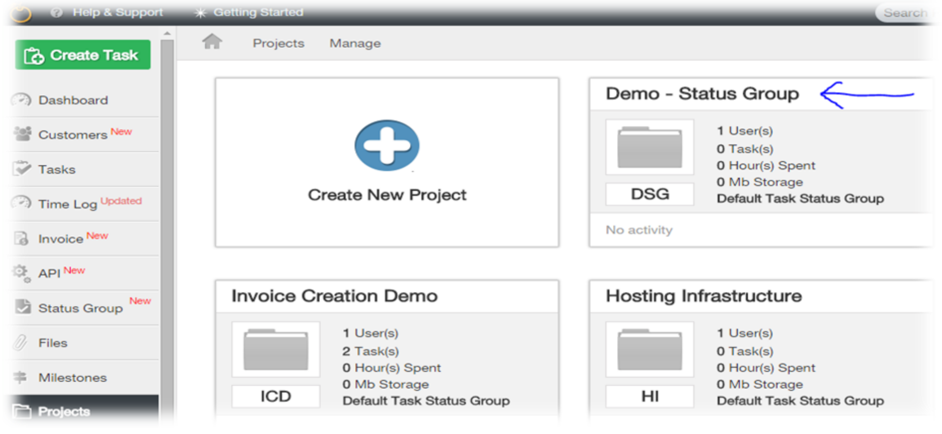
- Customize status for your Task Group
- Combine tasks with respect to a particular task group status
- Find information easily at one place
- Tasks defined according to Task Group Status

Request for Task Status Group Add-on
Click Here To Know More

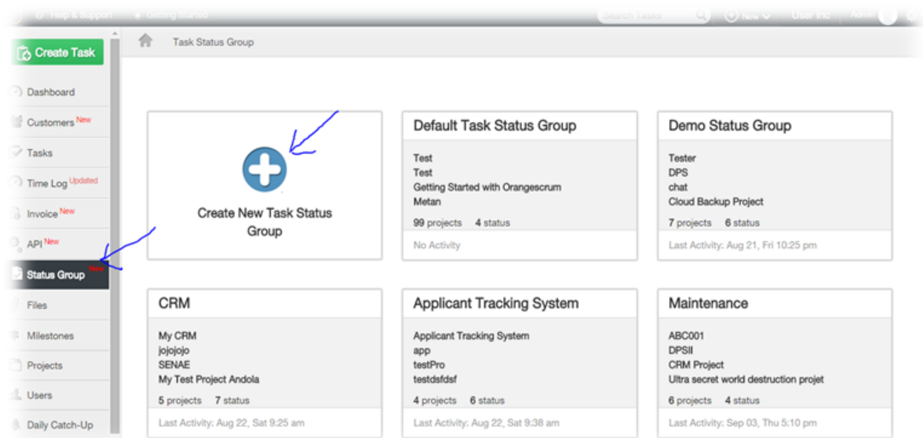
Here is the tutorial to demonstrate "HOW TO USE TASK STAUS GROUP"?

- First create a project. Go to the " Projects " button on the Panel located towards the Left hand side of the screen.
- Click on "Create a Project" to create your ne project.
- In this case, Lets name the Project as Demo – Status Group with its short name as "DSG".
- By default the "Task Status Group field will be shown as " Default Status Group"
- Hit " Create " to create your new Project. Now see the Figure below;

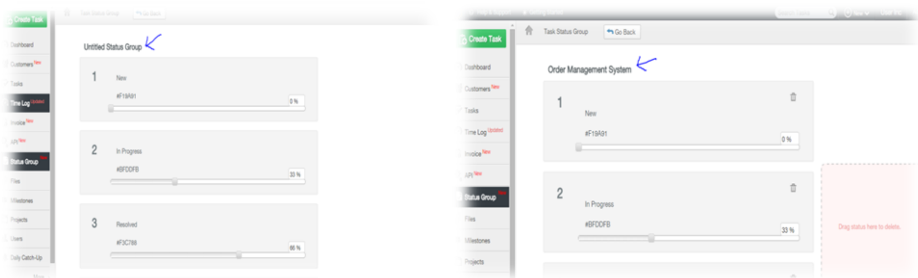




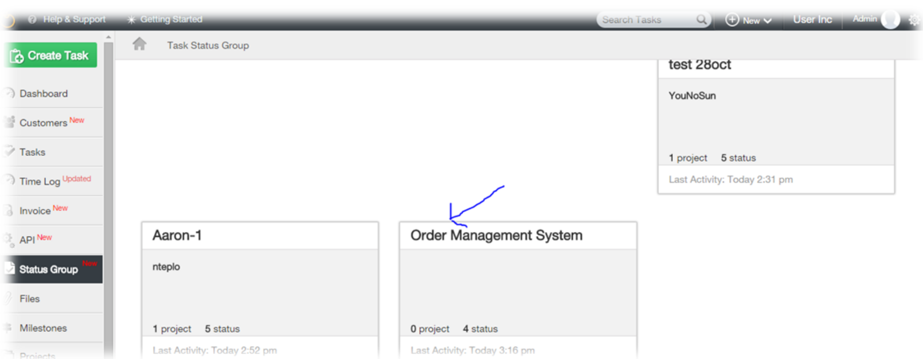
- Now Navigate to the " Status Group " and when you click it, the below screen will appear;



- Click on **"Create New task Status Group"** to create a new Task Status Group. When you click the button, the next page will appear which is shown in the Figure below;



- By default the name of the Group will be set as **"Untitled Status Group".** You can always change it to the name of your choice. For now let's name it as **"Order Management System".When you do it, a button will be created at the main page of "Task Status Group". See the figure below;**

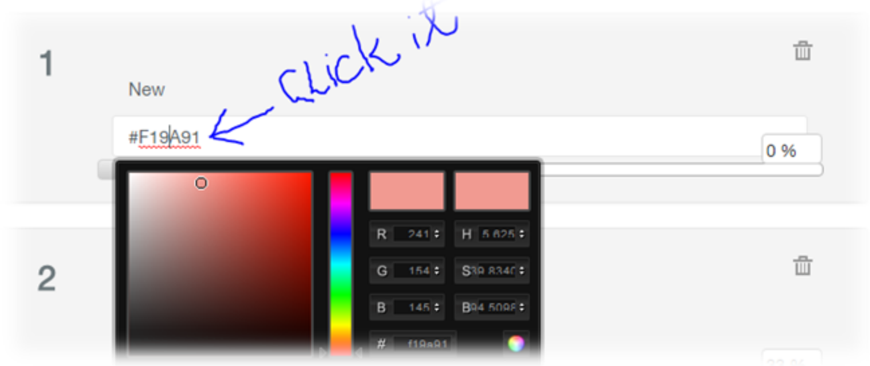


- Note, the parameters are set as Now – 0%, In progress-33%, Resolved-66%, closed-99%. All of them can be changes as per your status requirement with allotting different colors to each allotment. See the figure below for a clearer understanding.

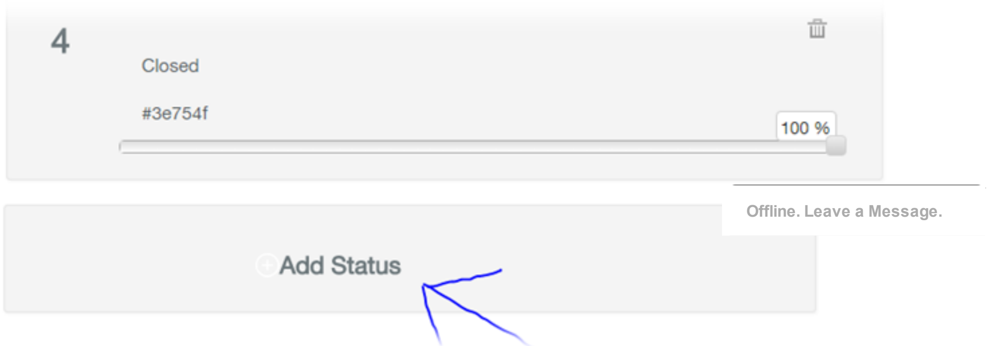
FEATURES

1. Tasks
2. Invite Users
3. Time Log
4. Projects
5. Milestone
6. Invoice
7. Task Status Group
8. API

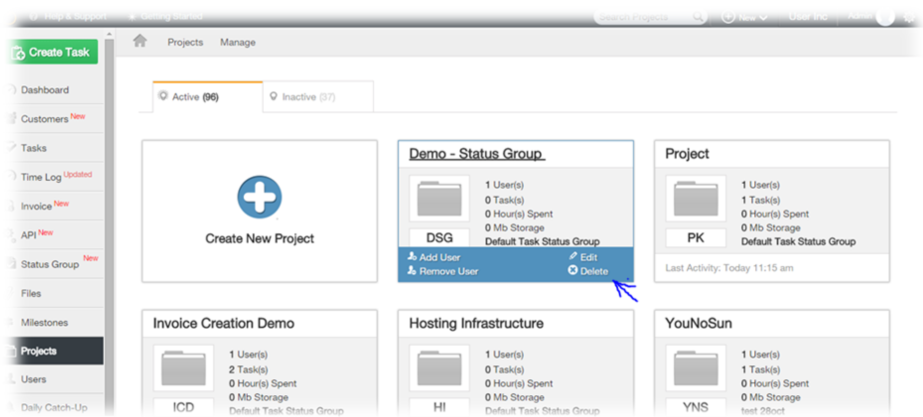
- You can now adjust the color preferences with the color codes shown in each sub status bar. See the figure below;



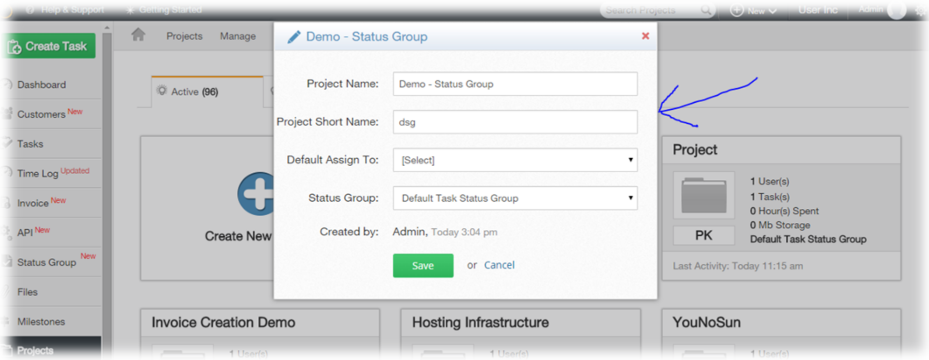
- Not only this, you can "**add status**" as per your requirement with the tab located at the bottom of the screen. See the figure below;



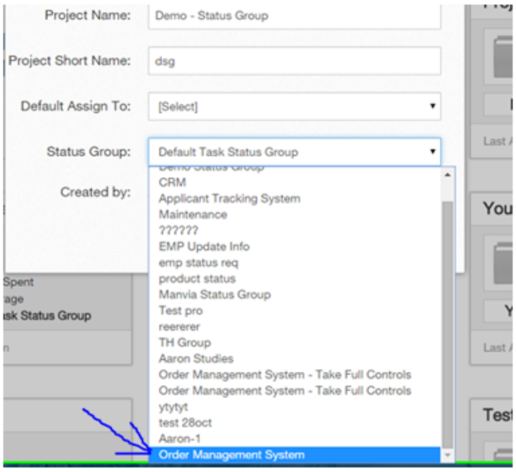
- Now to "add" your new "Status Group- Order Management System" to the Project "Demo Status Group", again click on " Projects " button on the left hand side of the screen on the Panel. Navigate to the main page where you will find the button for **"Demo Status Group"**
- Hover your mouse on the **"Demo Status Group"** button, some option will appear namely – **Add user, Remove User, Edit and Delete** as shown in the figure below;



- Use the "Edit Option". When you click on the edit option, another window will appear which will look like the Figure shown below;

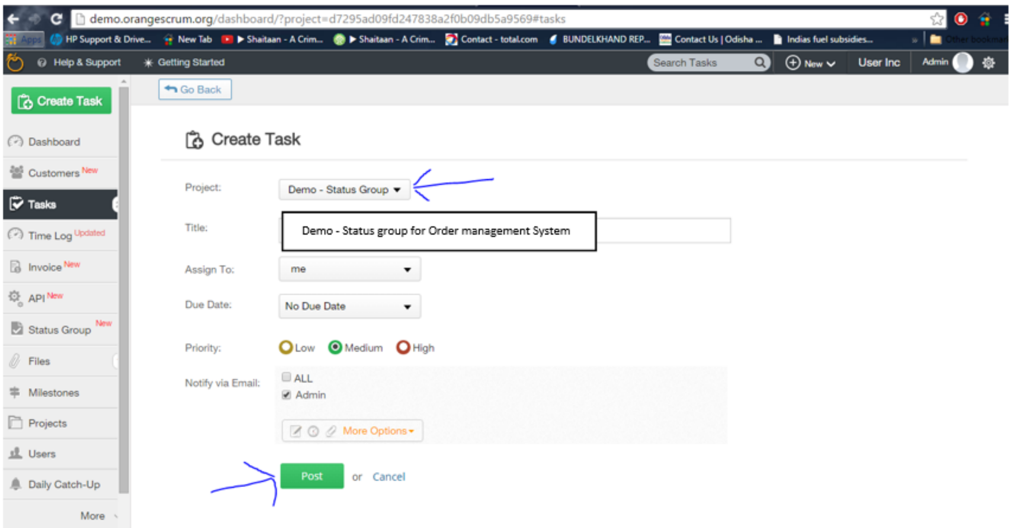


- Click on the "Status Group column" to search for your project, in this case we had created **"Order Management System".** See the Figure below;

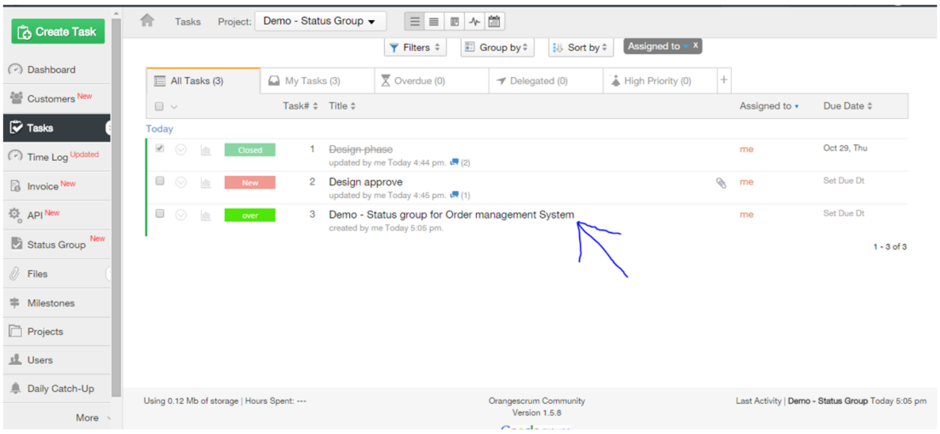


- After selecting the "Task Group", hit " Save " button.
- Now **"Create a new Task"** using " Create Task " button and view the details inside. A screen will appear which will look like the one given below;

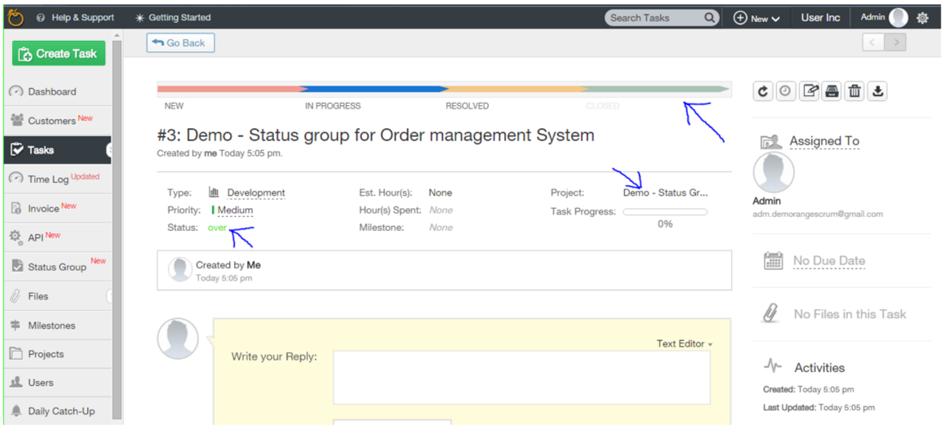
Demo - Status group for Order management System



- Add the title and hit **"POST"**
- It will take you back to the main screen, where you can see your "Task Group Status" inside the "task"
- Please see the figure below;



- Click the task to see your various **"Task Status"** inside. Please see the figure below for a quick reference;



Request for Task Status Group Add-on
Click Here To Know More

How to use API in Orangescrum

What is an API?

Orangescrum supports programmatic interaction with your data via a HTTP-based REST API. You can use the API to integrate Orangescrum with third-party applications, dashboard widgets, or your own custom software. This makes it easy to communicate with a wide variety of environments and applications. APIs allows sharing of content and data between applications by making it easy to retrieve data from one application and update it in another application.

This means if you're using multiple tools to manage your work, you can use an API to link your multiple application with Orangescrum.

How does API Work in Orangescrum?

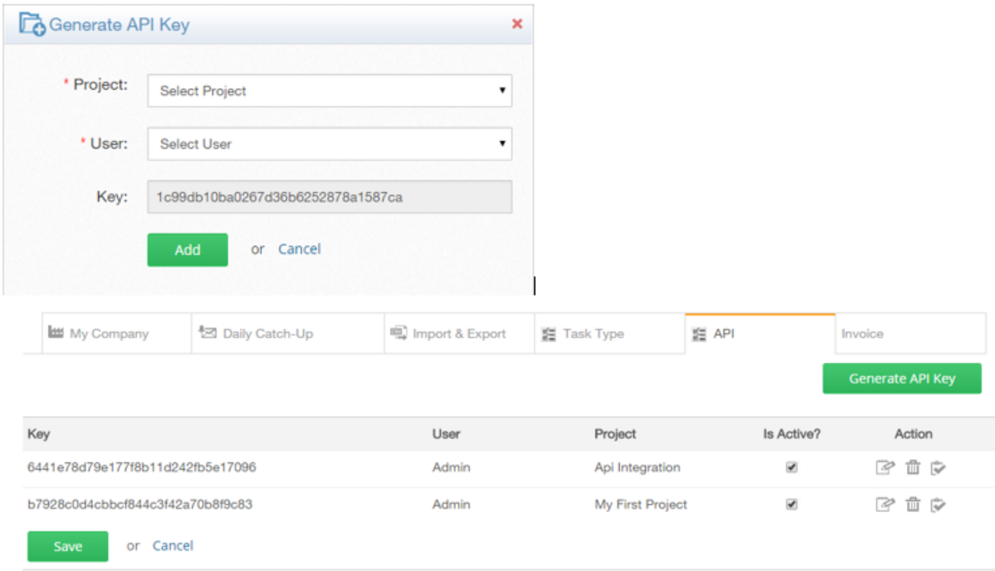
With Orangescrum's API Add-on you can manage how different components should interact with each other majorly with the GUI components.

Creating a new task is as easy as posting to the create_task endpoint with a data block containing the fields you'd like to set on the task. Every task is required to be created in a specific project, and this project cannot be changed once set. The project needs to be set explicitly and assigned to the concerned user. You can download your API add-on here. Our installation guide will make it easier for you to integrate API Add-on with Orangescrum.

STEP 1:

CREATE NEW API KEY

Open API settings page and click on "Generate API Key" button to generate new API key. It will open a API create form popup. Select Project and user and click on Add button.



STEP 2:

CREATE TASK
POST /create_task

Creating a new task is as easy as posting to the create_task end point with a data block containing the fields you'd like to set on the task. Any unspecified fields will take on default values.

Every task is required to be created in a specific project, and this project can not be changed once set. The project need be set explicitly to the concerned user.

STEP 3:

Create a task (Using API in PHP)

```
$curl_post_data = array(
'api' => text < api_key >,
'title' => text < task title>,
'description' => text < task description>,
'due_date' => datetime < due_date >,
'estimated_hour' => float ,
);
$counter = 1;
if (is_array($_FILES) && count($_FILES) > 0) {
foreach ($_FILES as $key => $value) {
if ($value['name'] != '') {
$tmp_name = $value['tmp_name'];
$name = str_replace(" ", "_", basename($value['name']));
$curl_post_data[ 'file'.$counter] = '@'.realpath($tmp_name)
.";filename=" . $name;
$counter++;
}
}
}
$ch = curl_init();
curl_setopt($ch,CURLOPT_URL,"< domain >/api/v1.0/create_task.json");
curl_setopt($ch, CURLOPT_POST, 1)
curl_setopt($ch, CURLOPT_POSTFIELDS, $curl_arr);
curl_setopt($ch, CURLOPT_HEADER, 1);
curl_setopt($ch, CURLOPT_RETURNTRANSFER, true);
$server_output = curl_exec($ch);
```

```
$header_size = curl_getinfo($ch, CURLINFO_HEADER_SIZE);
$header_size = curl_getinfo($ch, CURLINFO_HEADER_SIZE);
$body = substr($server_output, $header_size);
$info = curl_getinfo($ch);
curl_close($ch);
```

STEP 4:

Response Headers:

404 : unauthorises

601 : key missing

602 : title missing

603 : server error

604 : empty request

200 – OK; The request was successful.

500 - Internal Server Error; Automatically receives notifications of these errors and they should be addressed shortly

TECHNICAL INFORMATION

The API is HTTP-based and conforms to the design principles of Representational State Transfer (REST). API calls require the use of the correct HTTP request method POST, Calls that create data require a POST request.

The API currently supports getting data in JSON format only (XML format will be including shortly). Simply change the format extension of a request to get results in the format of your choice. Add .json to the end of the request to get the response back in JSON format

USAGE

Use the links on the left to view the supported API calls. Each API call will include example requests and responses. The response will show actual data from your account. If you do not have any data for a specific call, the response will be empty until you populate your account with the appropriate data. For example, creating a new task; a set of parameters need to be specified by generating an API key for a specific project and assign to the intended user. The examples will be given using the tool CURL. to send request to server. However, any scripting language using CURL could be used to interact with the API.

AUTHENTICATION

API requests are authenticated using HTTP Basic Authentication. Your authentication credential consists of only 'API key.' An HTTP response of "404 - Unauthorized" will be returned for missing or incorrect authentication credentials.

REQUESTS

Requests that include a message body must specify the message format by including a "Content-Type" HTTP header that indicates the format of the body content(i.e., **application/json** for JSON)

Some API calls accept optional request parameters. When making requests with parameters, ensure that the parameter values are UTF-8 and URL encoded.

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