

Jobsworth Project Management 4.0

jw40doc.140127

Jobsworth Project Management 4.0: Installation and Manual

jw40doc.140127

Publication date: January 30, 2014

Wolfram Plettscher

[mail://git61@safe-mail.net](mailto:git61@safe-mail.net) 

Copyright (c) 2014 Wolfram Plettscher

Permission is granted to copy, distribute and/or modify this document under the terms of the GNU Free Documentation License, Version 1.2 or any later version published by the Free Software Foundation with no Invariant Sections, no Front-Cover Texts, and no Back-Cover Texts. A copy of the license is included in the section entitled "GNU Free Documentation License".

[GNU Free Documentation License \(http://www.gnu.org/licenses/fdl-1.3-standalone.html\)](http://www.gnu.org/licenses/fdl-1.3-standalone.html) 

Contents

Preface iv

I	INSTALLATION	1
1	base OS installation	2
2	Database	3
3	Apache	5
4	Servlet container	6
5	E-Mail	10
6	Jobsworth	12
II	ADMINISTRATION	13
7	Login	14
8	Menu Items	16
9	Widgets	54
10	Workflow	55

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 Database 3
- 3 Apache 5
- 4 Servlet container 6
- 5 E-Mail 10
- 6 Jobsworth 12

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. 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.

First of all get an operating system on a dedicated machine running. Typically Jobsworth only uses server functionality, therefore a graphical user interface (e.g. Gnome or KDE) is not necessary. If you are new to server installation, such GUI would help you to find your way around (e.g. looking on the web for HowTo's).

2 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 an `admin-user`. Feel free to adjust database-name, user-id and password and note it for later configuration. Then quit `mysql-console`.

```
CREATE DATABASE mydb DEFAULT CHARACTER SET utf8
CREATE USER -'monty'@'localhost' IDENTIFIED BY -'some_pass';
GRANT ALL PRIVILEGES ON *.* TO -'monty'@'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"
```

3 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.

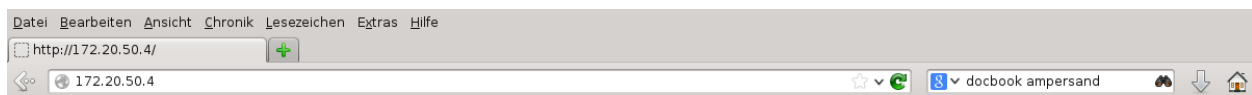
To enable the start of Apache Web-Server during start of your server, the following entry (depending on your OS and apache version) has to be inserted into your startup configuration file (e.g. /etc/rc.conf)

```
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 3.1: **APACHE WORKS**


4 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". ❶

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](#)
- [Realms & AAA](#)
- [Examples](#)
- [Servlet Specifications](#)
- [First Web Application](#)
- [JDBC DataSources](#)
- [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
Important announcements, releases, security vulnerability notifications. (Low volume).
- users@tomcat.apache.org
User support and discussion
- taglibs-user@tomcat.apache.org
User support and discussion for [Apache Taglibs](#)
- 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

- [Overview](#)
- [SVN Repositories](#)
- [Mailing Lists](#)
- [Wiki](#)

Miscellaneous

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

Apache Software Foundation

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

Copyright ©1999-2014 Apache Software Foundation. All Rights Reserved

FIGURE 4.1: TOMCAT WORKS

5 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.

6 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.

II Administration

- 7 Login 14
- 8 Menu Items 16
- 9 Widgets 54
- 10 Workflow 55

7 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 checkbox labeled 'Remember me'. At the bottom of the form, there is a 'Login' button and a link that says 'Forget your password?'.

FIGURE 7.1: 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.

8 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.

8.1 Overview

8.1.1 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.

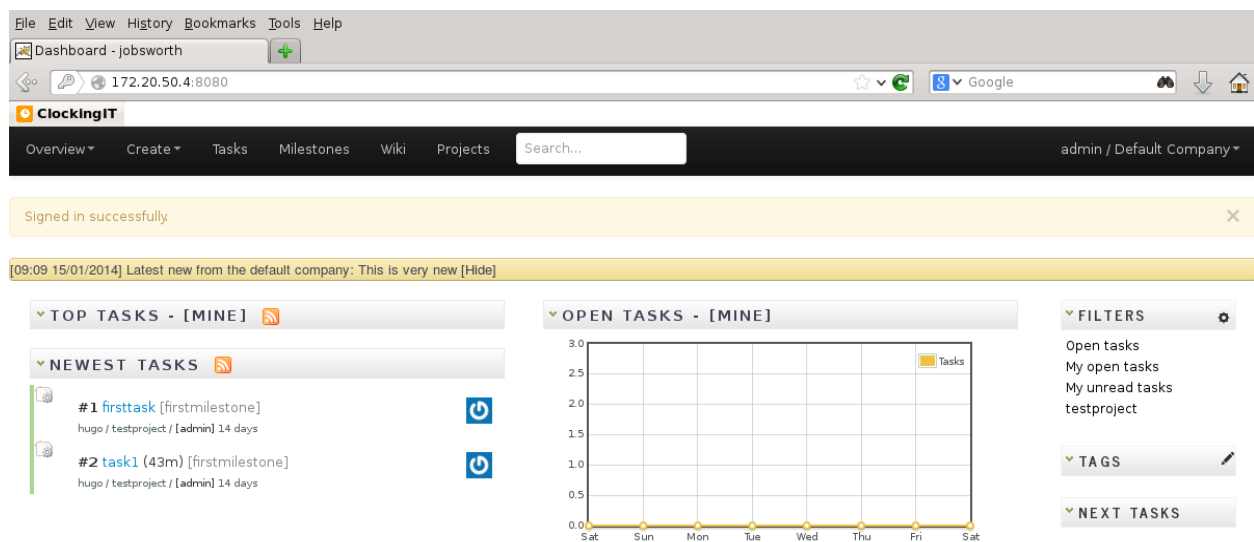


FIGURE 8.1: DASHBOARD

8.1.2 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.

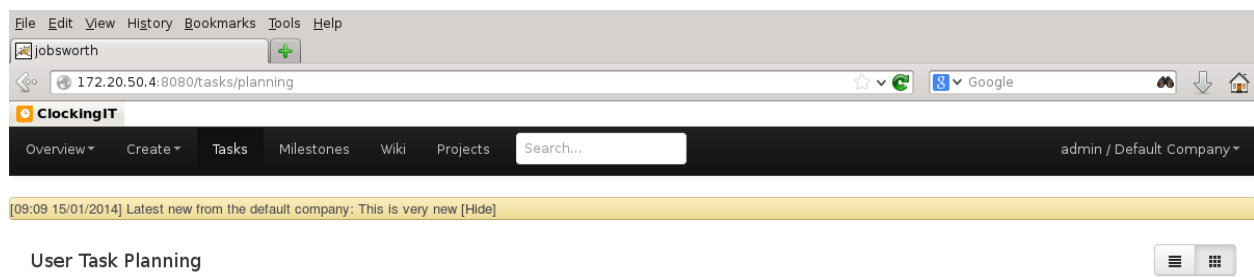


FIGURE 8.2: **PLANNING**

8.1.3 Billing

The screenshot shows a web browser window with the address bar displaying "172.20.50.4:8080/billing/list". The browser's menu bar includes "File", "Edit", "View", "History", "Bookmarks", "Tools", and "Help". The page title is "Billing - jobsworth". Below the browser window is a navigation bar for "ClockingIT" with links for "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 "Billing Reports". It contains a form with a "Time Sheet" dropdown menu. Below this is a "Report filter" section with four dropdown menus: "[Any Project]", "[Any User]", "[All]", and "This Week". There are two checkboxes: "Hide approved logs" and "Hide rejected logs". At the bottom of the form is a blue "Run Report" button.

FIGURE 8.3: BILLING

8.1.4 History

The screenshot shows the ClockingIT application interface. At the top is a navigation bar with links: Overview, Create, Tasks, Milestones, Wiki, Projects, and a search bar. The user is logged in as 'admin / Default Company'. Below the navigation bar is a status bar showing the date '15/01/2014' and a message: 'Latest new from the default company: This is very new [Hide]'. The main section is titled 'Timeline'. It features a filter section with dropdowns for '[Any Project]', '[Any Type]', and 'Now', along with a 'Submit Query' button. To the right of the timeline are three sidebar sections: 'FILTERS' (with links: Open tasks, My open tasks, My unread tasks, testproject), 'TAGS' (with an edit icon), and 'NEXT TASKS'. The timeline itself lists activities for 'Wednesday, 15 January 2014'. Each entry includes a timestamp, a task name (e.g., 'Frontpage', '#2 task1', '#1 firsttask', 'test'), a user icon, and a status icon (a blue circle with a white 'G').

Time	Task	User	Status
09:05	Frontpage	[admin]	Open
09:01	Frontpage	[admin]	Open
08:55	Frontpage	[admin]	Open
08:55	Frontpage	[admin]	Open
08:53	Frontpage	[admin]	Open
08:52	Frontpage	[admin]	Open
08:06	#2 task1	hugo / testproject / [admin]	Open
08:01	#1 firsttask	hugo / testproject / [admin]	Open
08:01	#1 firsttask	hugo / testproject / [admin]	Open
07:39	test	[admin]	Open
07:39	Frontpage	[admin]	Open

FIGURE 8.4: HISTORY

8.2 Create

8.2.1 Create Task

The screenshot shows the 'New Task' form in the ClockingIT application. The browser address bar shows '172.20.50.4:8080/tasks/new'. The application header includes navigation links: 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 indicates the latest news from the default company.

The main form area contains the following sections:

- Task Name:** A large text input field labeled 'Enter task name...'. Below it is a smaller field 'Add a todo item...'.
- Task Description:** A large text area labeled 'Enter task description...'. Below it is a smaller field 'Add a comment...'.
- Task Attributes:** A series of dropdown menus for Project (Please select), Milestone ([None]), Time (1h (default)), Estimate, Target Date, Resolution (Open), and a 'Save' button.
- Attributes:** A section with dropdown menus for Tags, Type (Task), Priority (Normal), Severity (Normal), and Service ([None]). A 'billable' checkbox is also present.
- Notifications:** A section with a 'Companies' dropdown and a 'Users To Notify' list containing 'admin'.
- Snooze until:** A section with a 'Until customer responds' checkbox and a 'Snooze until' date picker.
- Resources:** A section with a 'Linked Resources' dropdown.

The right sidebar contains the following sections:

- FILTERS:** A section with a gear icon and a list of filters: Open tasks, My open tasks, My unread tasks, and testproject.
- TAGS:** A section with a pencil icon and a list of tags.
- NEXT TASKS:** A section with a list of next tasks.

FIGURE 8.5: 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.

8.2.2 Create Project

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/projects/new'. The browser's menu bar includes 'File', 'Edit', 'View', 'History', 'Bookmarks', 'Tools', and 'Help'. The page title is 'New Project - jobsworth'. The browser's address bar shows '172.20.50.4:8080/projects/new'. The page features a navigation bar 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 reads '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The main content area is titled 'New Project' and contains a form with the following fields: 'Name' (text input), 'Company' (text input with a selection icon), 'Default Estimate' (text input with '1.0'), 'Description' (large text area), and 'Copy permissions from' (dropdown menu with 'None' selected). A blue 'Create' button is located at the bottom of the form. On the right side, there are three expandable sections: 'FILTERS' (containing 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'), 'TAGS' (with an edit icon), and 'NEXT TASKS'.

FIGURE 8.6: CREATE PROJECT

8.2.3 Create Milestone

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/milestones/new'. The browser's address bar also shows 'New Milestone : jobsworth'. The application's navigation bar includes 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects', along with a search bar and the user '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 'New Milestone' and contains a form with the following fields: 'Project' (a dropdown menu with 'testproject' selected), 'Name' (a text input field), 'Status' (a dropdown menu with 'planning' selected, with a tooltip that reads 'planning (can add tasks, all tasks are snoozed)'), 'Due Date' (a text input field), and 'Description' (a large text area). A 'Create' button is located at the bottom of the form. On the right side of the form, there are three sections: 'FILTERS' (with a gear icon and a list of 'Open tasks', 'My open tasks', 'My unread tasks', and 'testproject'), 'TAGS' (with a pencil icon), and 'NEXT TASKS'.

FIGURE 8.7: CREATE MILESTONE

8.2.4 Create Person

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/users/new'. The browser's user interface includes a menu bar (File, Edit, View, History, Bookmarks, Tools, Help), a toolbar with a search icon, and a status bar showing 'admin / Default Company'. The page title is 'ClockingIT'. The main content area is titled 'New user' and contains a form with the following fields and controls:

- Name:** A text input field.
- Email:** A text input field.
- Username:** A text input field.
- Password:** A text input field.
- Company:** A text input field with a small circular icon to its right.
- color:** A dropdown menu currently showing 'blue'.
- Send welcome email:** A checkbox that is currently unchecked.
- Signup Message:** A large text area with the placeholder text 'input welcome message here'. Below the text area, a small note reads: 'The message will be included in the signup email.'
- Copy permissions from:** A dropdown menu currently showing 'No one'.

At the bottom of the form is a blue button labeled 'Create'.

FIGURE 8.8: CREATE PERSON

8.2.5 Create Company

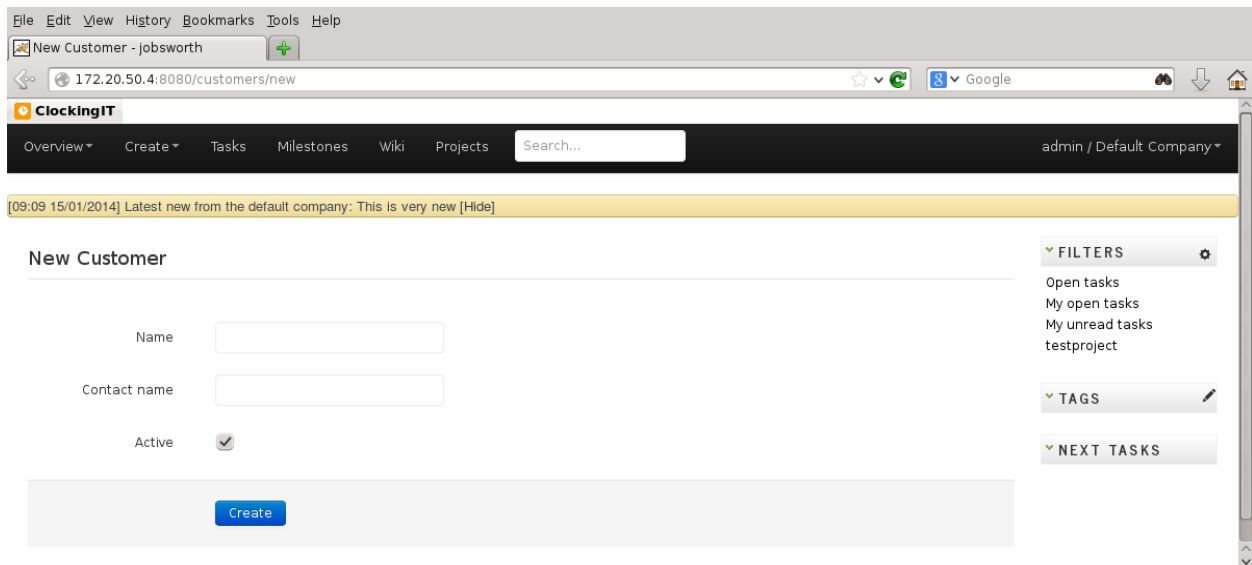


FIGURE 8.9: CREATE COMPANY



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 8.1: 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.

Please refer to the linked sections for more information about widgets used in this screen:

- *Section 9.1, “Filters”*
- *Section 9.3, “Tags”*
- *Section 9.2.2, “Next Tasks”*

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 8.2: EDIT COMPANY TABS

Tab	Purpose
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

8.2.6 Create Resource

The screenshot shows a web browser window with the address bar displaying '172.20.50.4:8080/resources/new'. The browser's title bar says 'New Resource - New Resource - j...'. The application's header bar includes the 'ClockingIT' logo and navigation links: 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects'. A search bar and the user's name 'admin / Default Company' are also present. A yellow status bar at the top of the application area shows a timestamp and a message: '[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]'. The main content area is titled 'New Resource' and contains a form with the following fields: 'Name' (text input), 'Company' (text input with a copy icon), 'Parent Resource' (text input), 'Type' (dropdown menu), 'Active' (checkbox, checked), and 'Notes' (text area). To the right of the form is a sidebar with three sections: 'FILTERS' (with a gear icon and a list: 'Open tasks', 'My open tasks', 'My unread tasks', 'testproject'), 'TAGS' (with a pencil icon), and 'NEXT TASKS'. Below the form is an 'Attributes' section, which is currently empty. At the bottom of the form is a blue 'Create' button.

FIGURE 8.10: 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.

8.2.7 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 9, Widgets](#)

8.3 Tasks

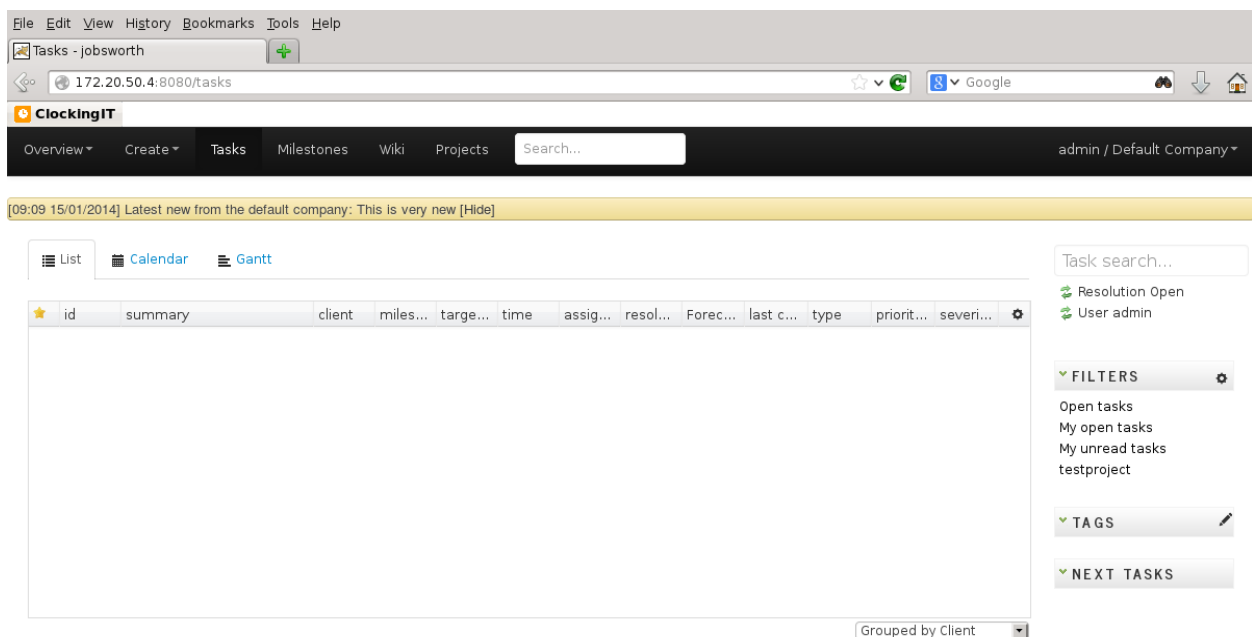


FIGURE 8.11: TASKS

8.4 Milestones

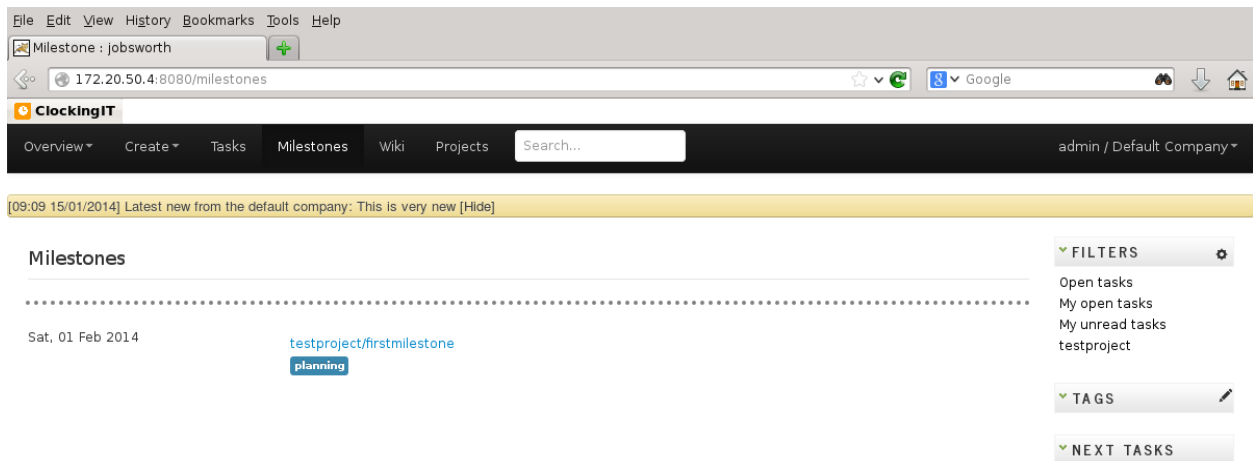


FIGURE 8.12: MILESTONES

8.5 Wiki

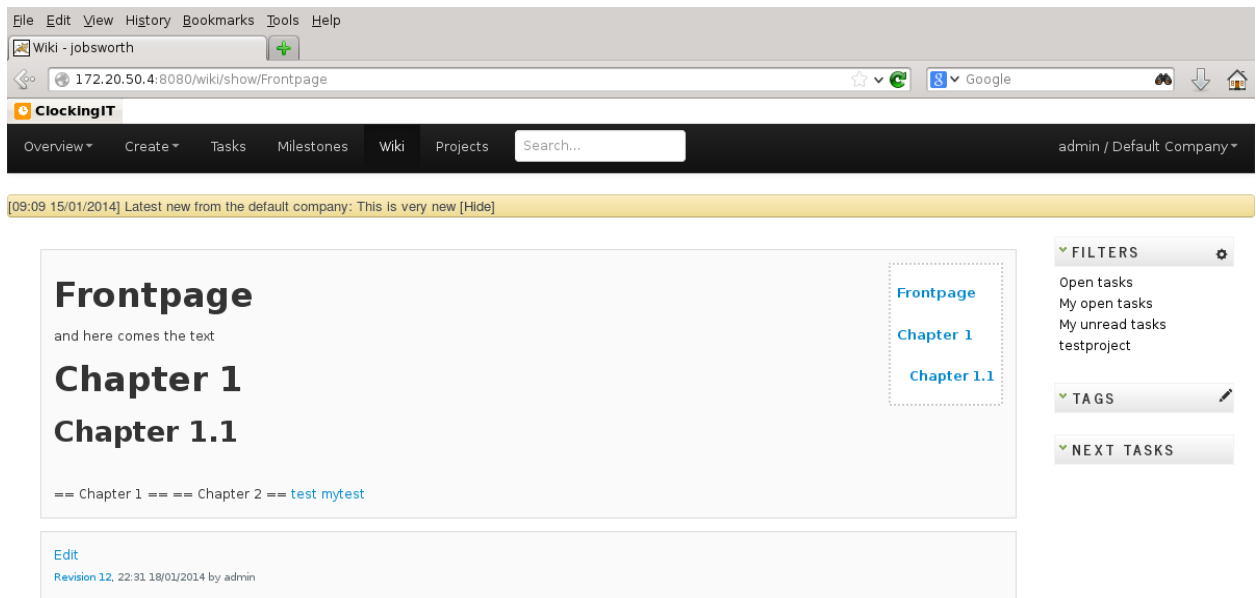


FIGURE 8.13: WIKI

8.6 Projects

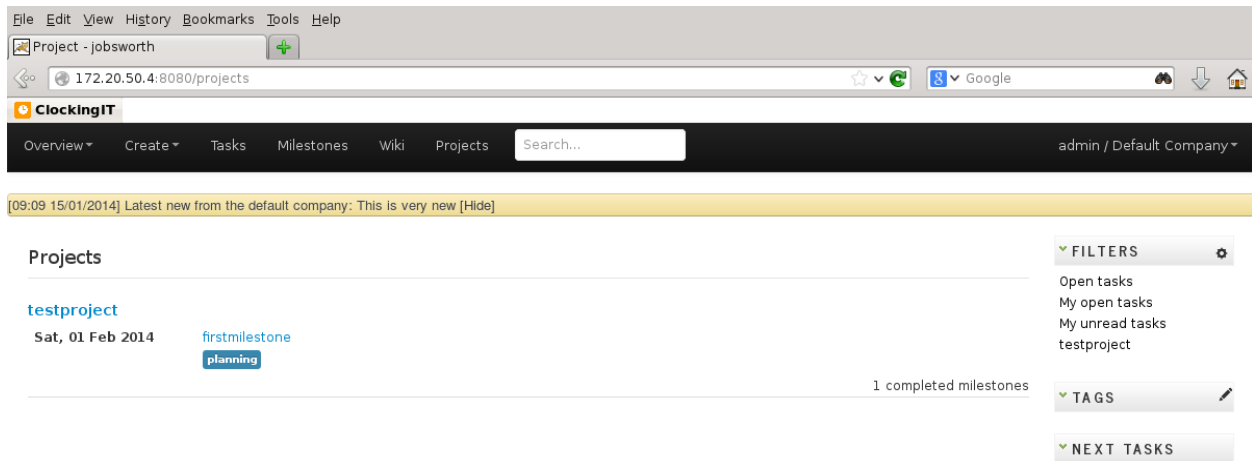


FIGURE 8.14: PROJECTS

8.7 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.

8.8 MyAccount

8.8.1 General

The screenshot shows the 'ClockingIT' web application interface. The browser address bar displays '172.20.50.4:8080/users/1/edit'. The top 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 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 left sidebar contains a menu with 'ADMIN' and 'General' (selected), and other options like 'Access Control', 'Email Addresses', 'Task Filters', 'Projects Permissions', and 'Work Plan'. The main content area is titled 'admin' and features a 'View Tasks' button. The settings are organized into a form with the following fields and values:

Field	Value
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 8.15: GENERAL

8.8.2 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 navigation 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 with checkboxes: 'Administrator' (checked), 'Can Create Projects' (checked), 'Read client details' (checked), 'Create clients' (checked), 'Edit client details' (checked), 'Approve work logs' (checked), and 'Access Resources' (checked). There 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 8.16: ACCESS CONTROL

8.8.3 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 shows a list of email addresses. The first entry is 'admin@example.org' with a 'Default' status. Below it is an input field labeled 'input email address' and an 'Add' button. A 'View Tasks' button is in the top right corner.

Email Address	Status
admin@example.org	Default

[Add](#)

FIGURE 8.17: E-MAIL ADDRESSES

8.8.4 Task Filters

The screenshot shows the ClockingIT web application interface. The top navigation bar includes 'Overview', 'Create', 'Tasks', 'Milestones', 'Wiki', and 'Projects'. The user is logged in as 'admin / Default Company'. A sidebar on the left lists administrative options: 'ADMIN', 'General', 'Access Control', 'Email Addresses', 'Task Filters' (selected), 'Projects Permissions', and 'Work Plan'. The main content area is titled 'admin' and 'Shared filters'. It states 'No one has shared their filters with you.' Below this, under 'My filters', there is a table with one entry: 'testproject Shared'. The table has 'Hide' and 'Delete' links for each entry.

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

FIGURE 8.18: TASK FILTERS

8.8.5 Projects Permissions

The screenshot shows the ClockingIT web application interface for the 'Projects Permissions' page. The top navigation bar and sidebar are the same as in the previous screenshot. The main content area is titled 'admin' and 'New user'. It displays a table with columns for various permissions: 'Project', 'Read', 'Comment', 'Work', 'Close', 'See Unwatched', 'Create', 'Edit', 'Assign', 'Milestone', 'Reports', 'Grant', and 'All'. The 'testproject' row shows all permissions granted with green checkmarks. Below the table, there is a section 'Add project to user' with an input field.

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

FIGURE 8.19: PROJECTS PERMISSIONS

8.8.6 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 8.20: WORK PLAN

8.9 Company Admin

8.9.1 General

File Edit View History Bookmarks Tools Help

Company Settings - jobsworth

172.20.50.4:8080/companies/1/edit

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

Company Settings

Company name: Default Company

Use Wiki: ☒

Use Resources: ☒

Use Billing: ☒

Use Score Rules: ☒

Suppressed email addresses:

(separate emails by comma or new line)

Incoming Email Project:

New Logo: No file selected.

(250x50px should look good. The logo will be shown up top instead of the Jobsworth one, and on your login page.)

FIGURE 8.21: GENERAL

8.9.2 Score Rules

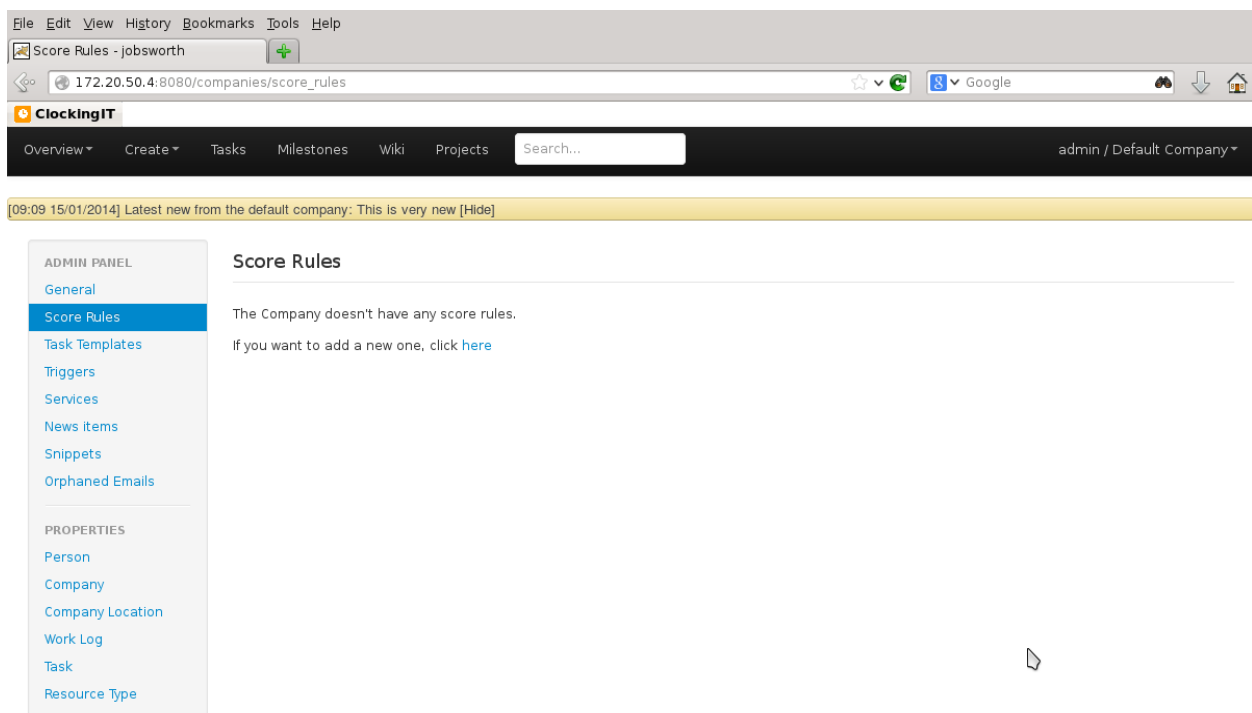


FIGURE 8.22: SCORE RULES

8.9.3 Task Templates

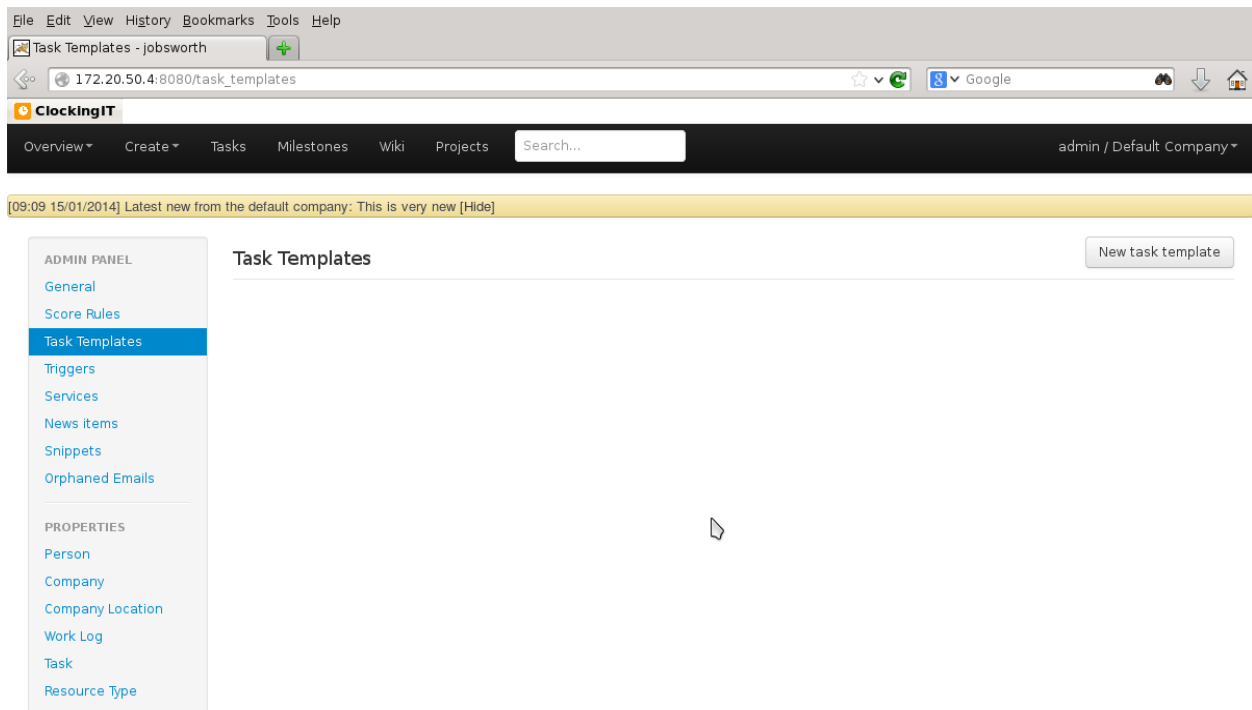


FIGURE 8.23: TASK TEMPLATES

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 8.24: NEW TASK TEMPLATE

8.9.4 Triggers

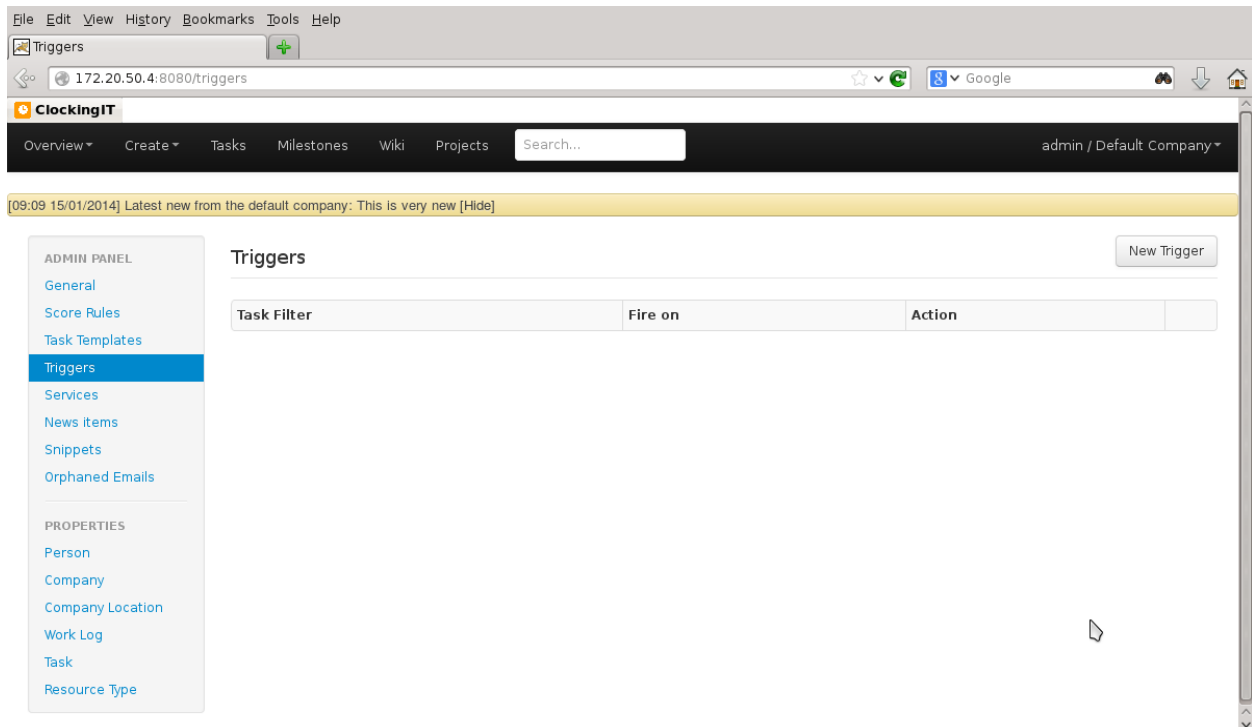


FIGURE 8.25: TRIGGERS

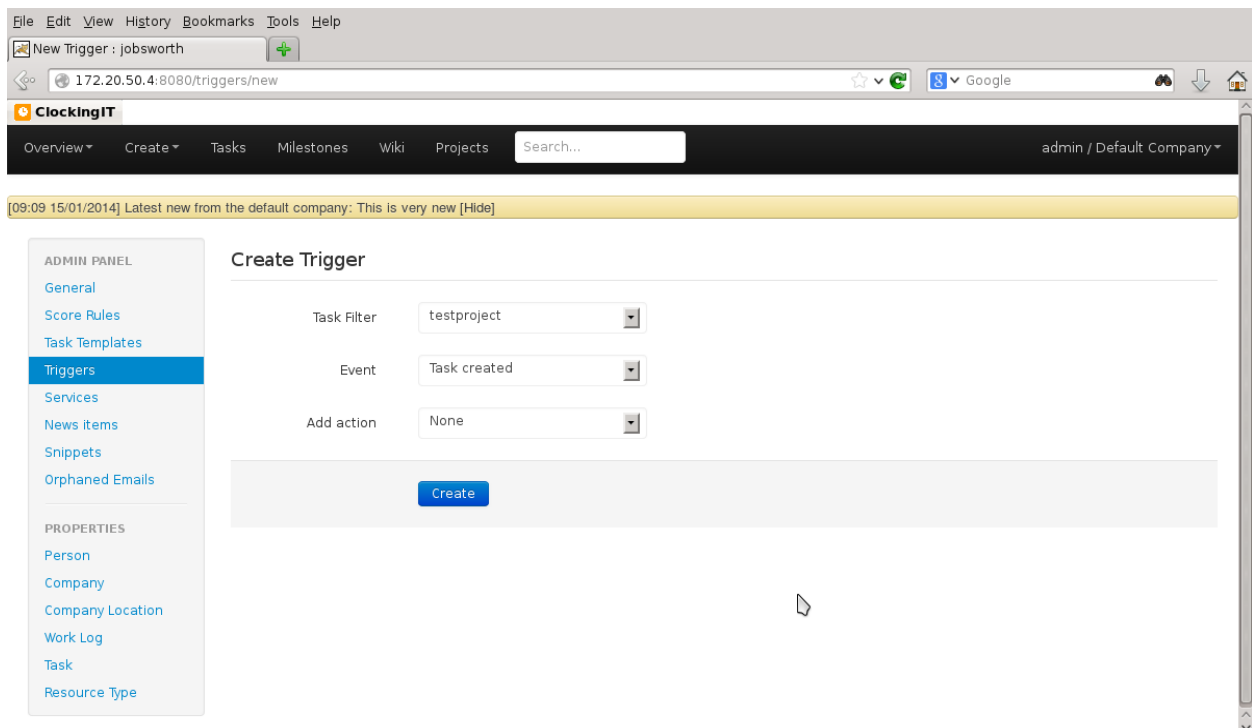


FIGURE 8.26: NEW TRIGGER

8.9.5 Services

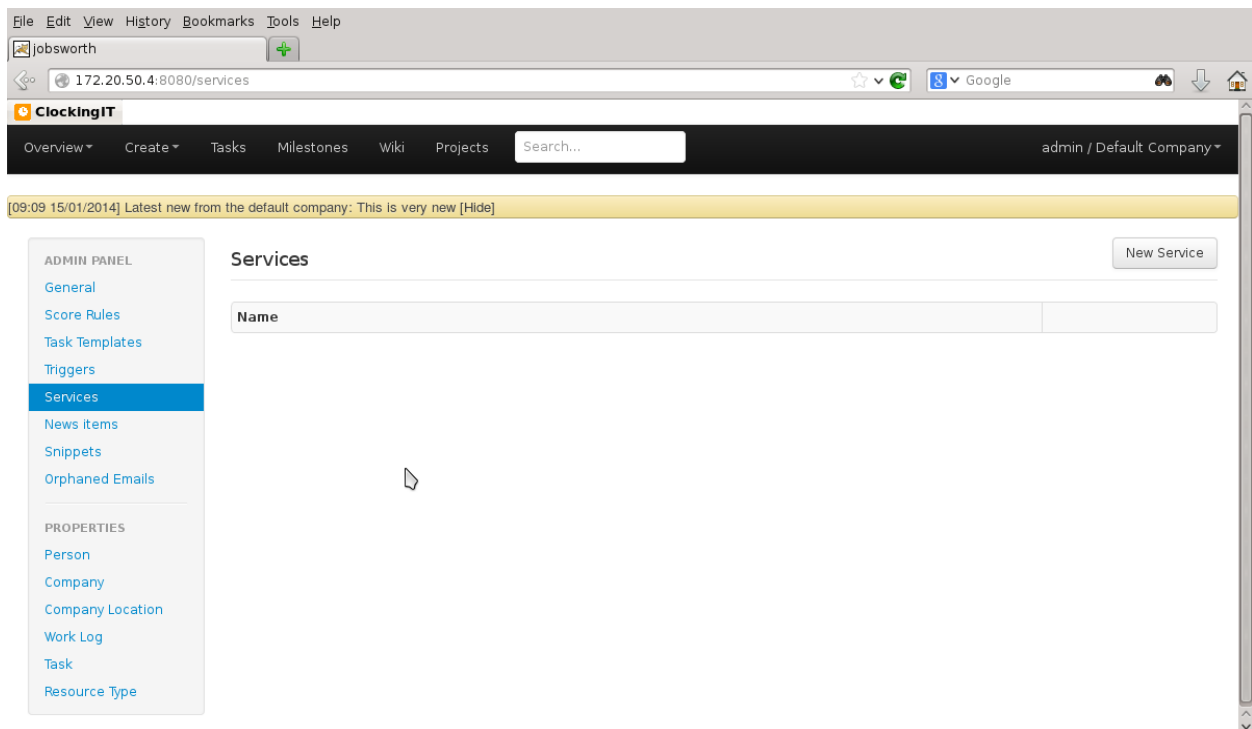


FIGURE 8.27: SERVICES

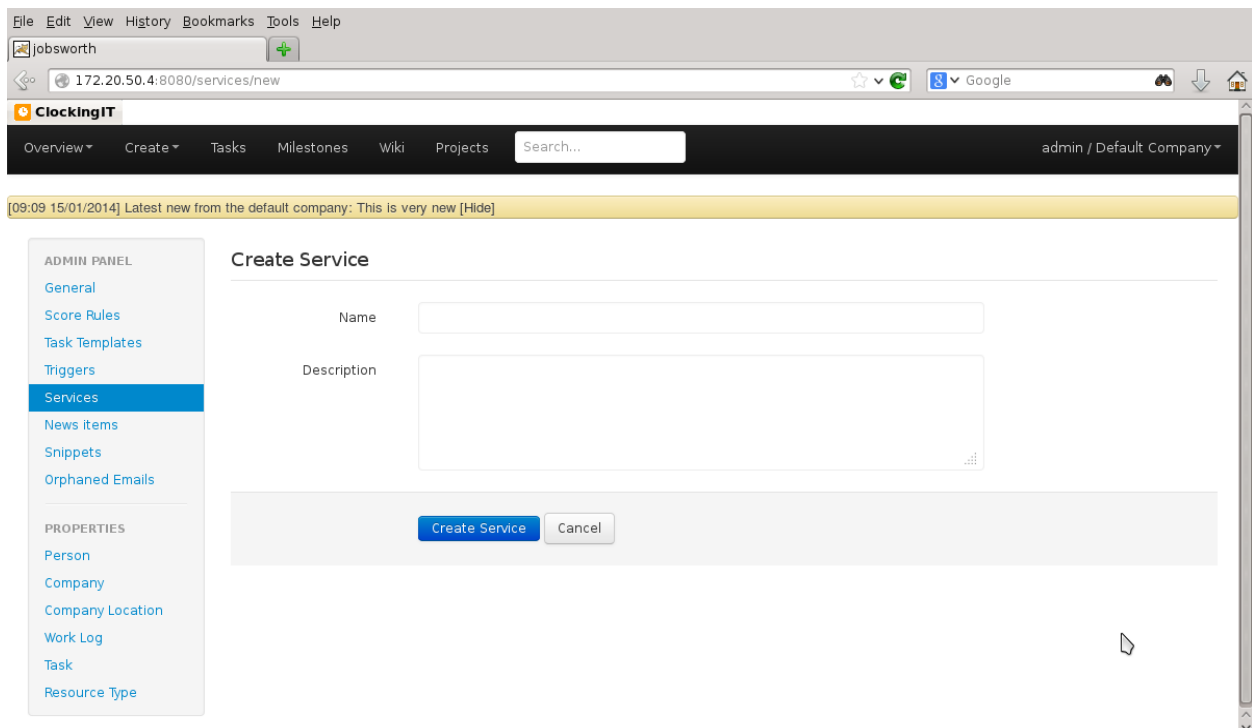


FIGURE 8.28: NEW SERVICE

8.9.6 News Items

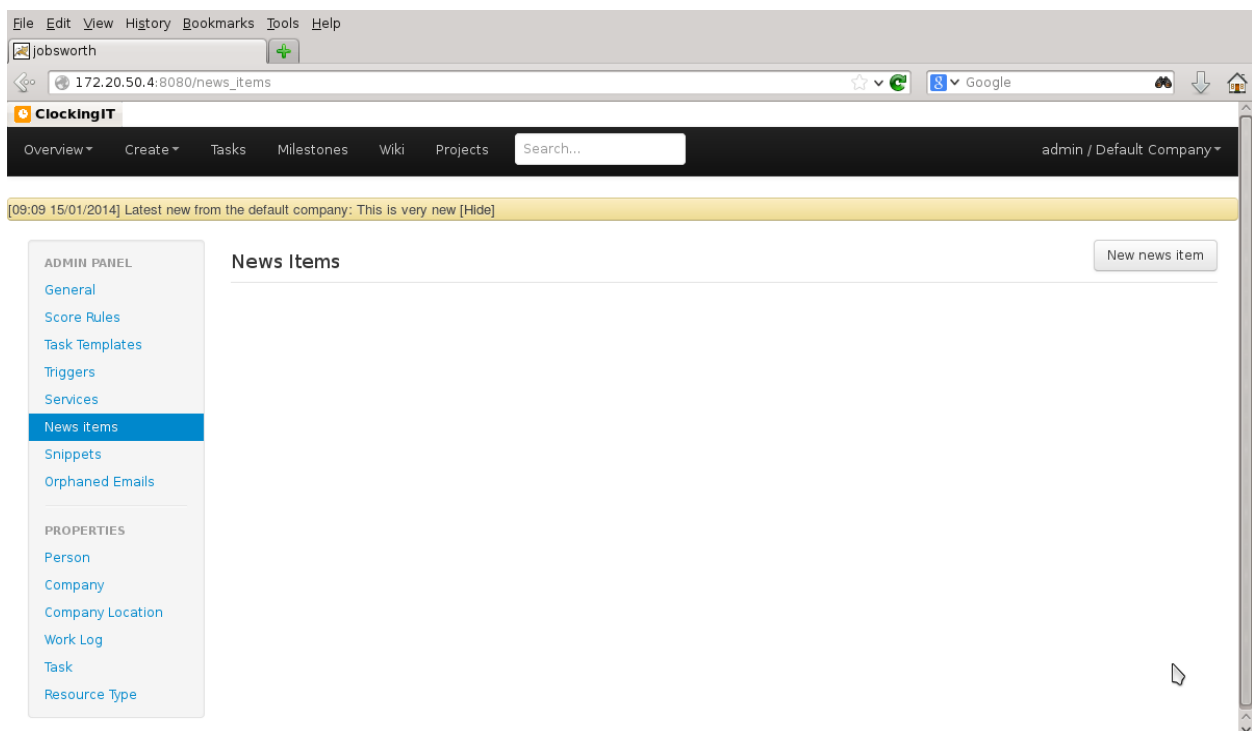


FIGURE 8.29: NEWS ITEMS

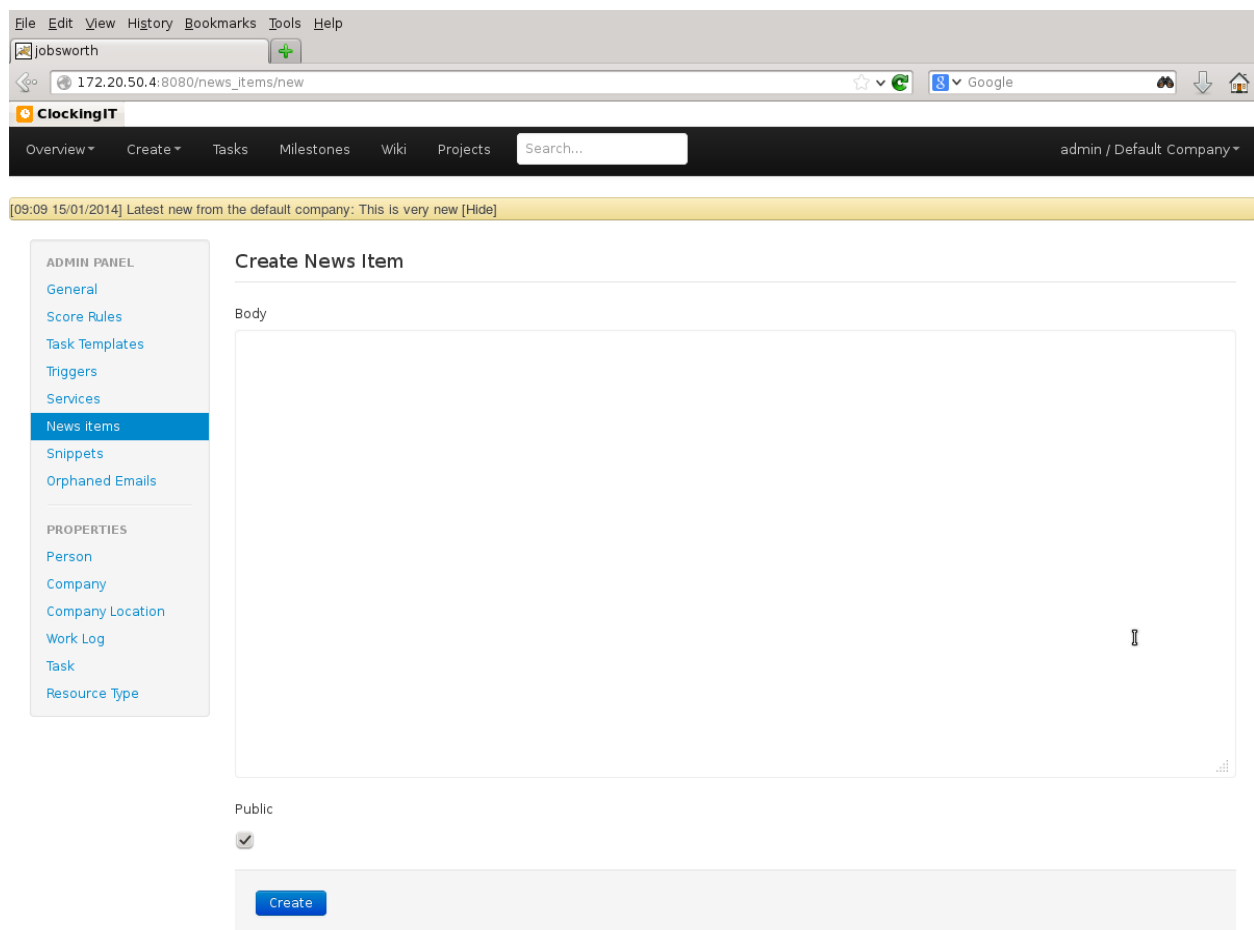


FIGURE 8.30: CREATE NEWS ITEM

8.9.7 Snippets

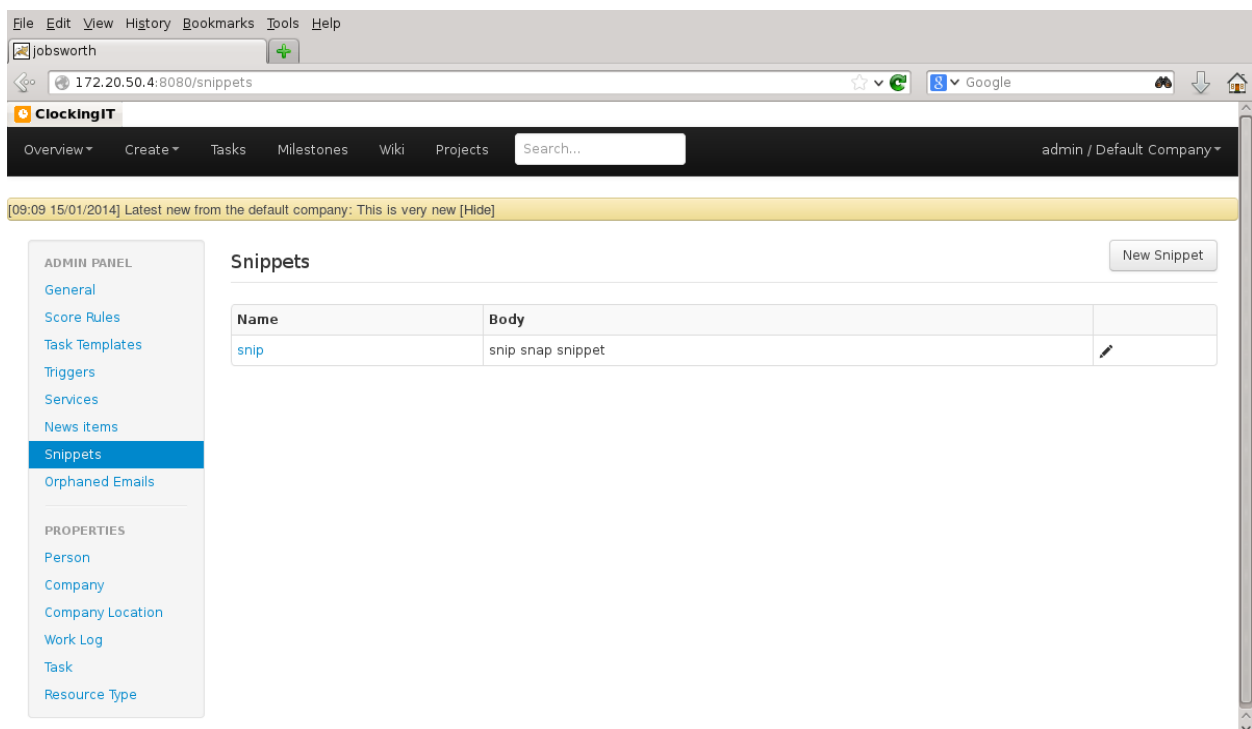


FIGURE 8.31: SNIPPETS

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 8.32: CREATE SNIPPET

8.9.8 Orphaned E-Mails

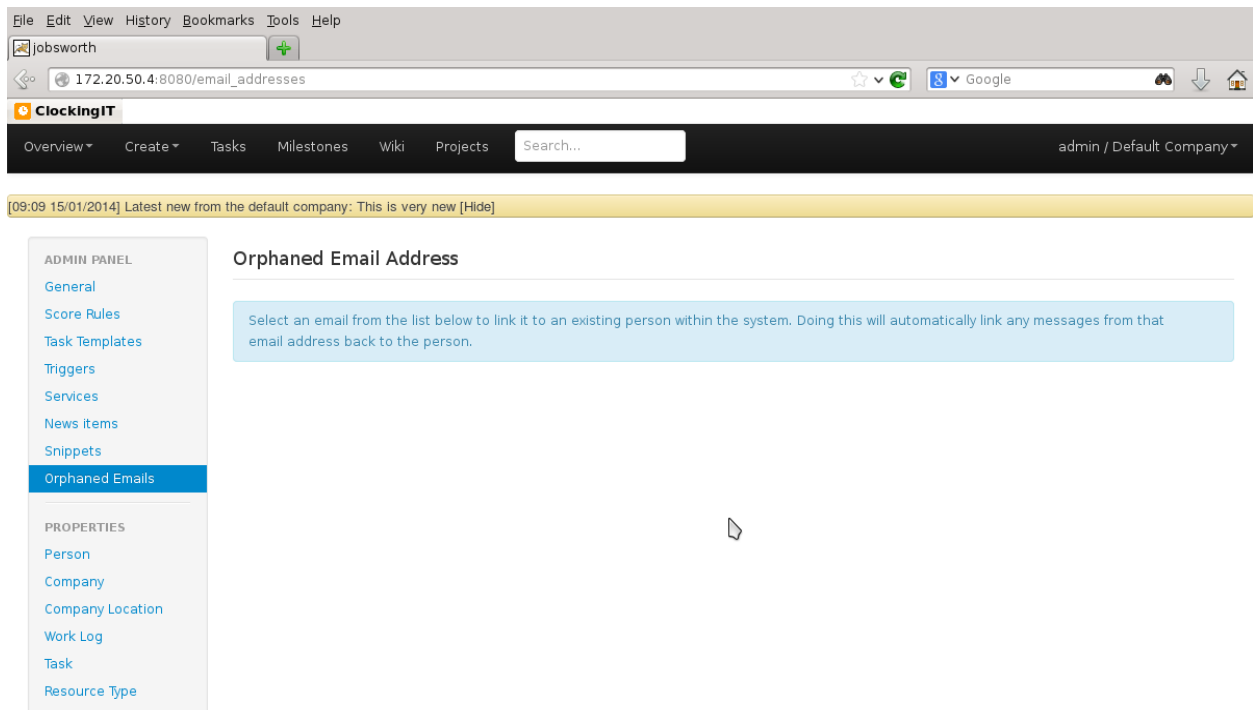


FIGURE 8.33: ORPHANED E-MAILS

8.10 Company Properties

8.10.1 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 profile "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 dropdown arrow and a "Remove attribute" link.
- 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).

The left sidebar contains a menu with two sections: "ADMIN PANEL" and "PROPERTIES". The "PROPERTIES" section is expanded, showing "Person" (highlighted in blue), "Company", "Company Location", "Work Log", "Task", and "Resource Type".

FIGURE 8.34: PERSON

8.10.2 Company

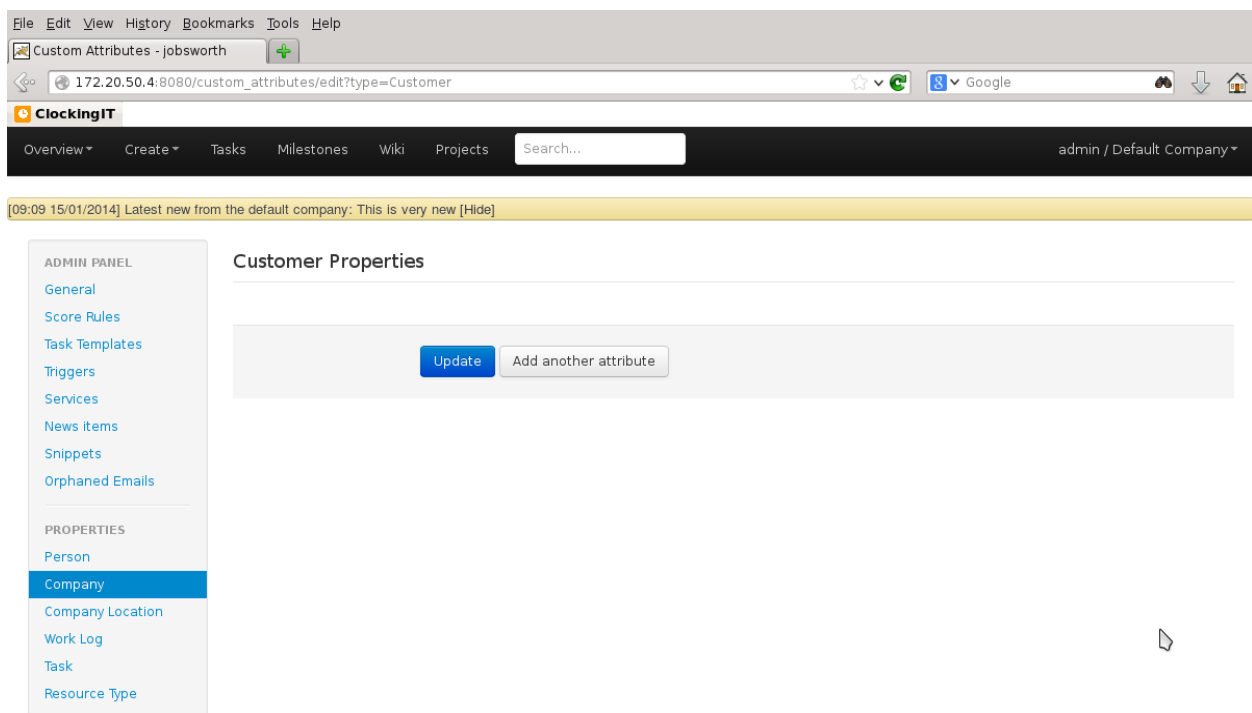


FIGURE 8.35: COMPANY

8.10.3 Company Location

The screenshot shows a web browser window with the address bar displaying `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, there is a sidebar menu with two sections: "ADMIN PANEL" and "PROPERTIES". The "ADMIN PANEL" section includes links for "General", "Score Rules", "Task Templates", "Triggers", "Services", "News Items", "Snippets", and "Orphaned Emails". The "PROPERTIES" section includes links for "Person", "Company", "Company Location" (which is highlighted), "Work Log", "Task", and "Resource Type".

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, there are two buttons: "Update" and "Add another attribute".

FIGURE 8.36: COMPANY LOCATION

8.10.4 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 the following fields and options:

- 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 8.37: WORKLOG

8.10.5 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 8.38: TASK PROPERTIES

8.10.6 Resource Type

The screenshot shows a web browser window with the address bar displaying `172.20.50.4:8080/resource_types`. The browser's address bar also shows the domain `jobsworth` and a search bar with the text `Search...`. The browser's status bar shows the user is logged in as `admin / Default Company`.

The application interface has a dark navigation bar at the top with the following items: **ClockingIT**, [Overview](#), [Create](#), [Tasks](#), [Milestones](#), [Wiki](#), [Projects](#), and a search bar. A yellow notification bar below the navigation bar displays the message: `[09:09 15/01/2014] Latest new from the default company: This is very new [Hide]`.

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	Edit	Delete

On the left side of the application, there is a sidebar menu with two sections: **ADMIN PANEL** and **PROPERTIES**. The **ADMIN PANEL** section includes links for [General](#), [Score Rules](#), [Task Templates](#), [Triggers](#), [Services](#), [News Items](#), [Snippets](#), and [Orphaned Emails](#). The **PROPERTIES** section includes links for [Person](#), [Company](#), [Company Location](#), [Work Log](#), [Task](#), and [Resource Type](#) (which is currently selected).

FIGURE 8.39: 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"/>	Remove attribute
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"/>	

FIGURE 8.40: CREATE RESOURCE TYPE

9 Widgets

9.1 Filters

FIGURE 9.1: FILTER WIDGET

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 9.2.4, “Task Search”](#)).

9.2 Tasks

9.2.1 Newest Tasks

9.2.2 Next Tasks

9.2.3 Top Tasks

9.2.4 Task Search

9.3 Tags

10 Workflow