



# OpenGlobal Duty Manager

## Instruction Manual



## Introduction

This Joomla! extension makes it easy to manage duties and rotas in a wide variety of clubs and mutual associations.

Duty swaps are completely managed so that members can swap duties without any administrator intervention required.

Different types of duty can be created, and some duties can be configured so that only certain members (who have the necessary skills/qualifications) can be assigned those duties.

Unregistered users can be assigned duties, although they will obviously be unable to swap their own duties and must be swapped by an administrator.

A perl script is also included which can be used, if your web server allows perl cron jobs, to send duty reminder emails a set number of days before the event.

This extension requires the JEvents extension to be installed to manage the events themselves. And, if you want to configure user-specific duties, you will need the Community Builder extension too.



## Installation

The OpenGlobal Duty Manager extension installs in exactly the same way as any other Joomla! extension. Simply log into the Joomla! administrative control panel as an Administrator (not “Manager”) and go to Extensions > Install/Uninstall.

If you are using Joomla 1.5, you'll need to upload and install the component (com\_....) and plugin (plg\_....) files independently. If you are on Joomla 2.5+, you can just upload the package file (pkg\_....).

As long as there are no errors, the extension is now installed. Go to the Plugin Manager and enable the *OpenGlobal Duty Manager Plugin*.

If JEvents is not already installed, you will need to install it now. Each of the events that you assign duties to will be events from the JEvents system.

If you want to be able to set up certain duty types that can only be done by certain members, you will also need to install Community Builder now. Community Builder allows you to add extra fields to a member record to define them as able to do particular duties.



## Configuration

It is assumed that you have already configured JEvents and added all of your events which require member duties.

Go to *Components > OpenGlobal Duty Manager* and click on the *Options* button (*Parameters* in Joomla 1.5).

Under *General Parameters*, select whether you want non-users to be listed in the duty manager. This allows you to type in their name rather than select from a dropdown list of the users. If all members are registered users on the website, leave this as *No*.

The second option is to select whether you want to be able to define certain duties as only being assignable to certain members. This requires special fields to be set up in Community Builder.

Select the usergroups that you want to be able to assign duties to. Hold down Ctrl and click to select multiple groups.

Select whether you want users to be able to sort out their duty swaps between them.

Select how many days in advance to send the duty reminder emails. This requires you to set up a cron job on your server to execute `<website_root>/administrator/components/com_ogdutymanager/assets/ogdutymanager.pl` once per day. Remember to set the permissions of that file to at least 755 on unix platforms, and move it to an executable directory if required.

If you are using the duty reminder emails, set the base URL of the website without the trailing slash.

Next, set up the duty types by going to the Duty Types view and click on *New*. Give the Duty name of your first duty type and give the duty a description in the *Notes* area. This is a good place to put the instructions for carrying out the duty requirements. If you have configured Duty Manager to use the Community Builder fields to specify duty permissions, you will need to select whether this duty is assignable to *All Users*, or only to users who have one of the listed options set to true in their profile. This dropdown list will display all published user fields from Community Builder with a type of *Check Box (Single)*.

Once you have configured your duty types, you can now start assigning users to duties to events. Go to the Duties view and click on *New*. At first you will only have one row, for one member to do one duty at one event. You can add more rows and submit them all in one go by clicking on the “+” button at the bottom.

For each row, first select the event (remember to select the right date for repeating events), then select the Duty Type. This will then populate the user list with the list of users who have permission to do this duty based on their usergroup and their Community Builder profile. If the person who is assigned this duty is not a user of your website, you can type their name into the box instead. Do not use this box to assign duties to users who do not have the correct permissions. This is only for non-users.

Once you have entered all of your duties, click *Save & Close* and you will then see the new duties in the Duties list.

The OpenGlobal Duty Manager Plugin will show the assigned duties for each of the events on the website depending on how the plugin is configured. You may only want to display the duties to logged in users.



Users can arrange duty swaps themselves by going to the website and viewing their duties (you can add a menu item specifically for showing a user's duties) and clicking on *Swap*. They can then select from a range of other duties to swap with and specify the text of the automatic email which gets sent to the other users.

The other users can then either accept or decline the duty swap by simply clicking a link in the email that they receive.