Administrator's guide to Tempo Timesheets

Administrator's guide

- Installing and upgrading Tempo Timesheets
- Setting up Tempo Timesheets

Managing Tempo Timesheets

Other useful links

- Release notes
- Administrator and user videos
- Webinars
- Frequently asked questions

Activating JIRA time tracking

For JIRA users to be able to log work in Tempo Timesheets, you must activate JIRA time tracking.

Required permission

JIRA Administrators permission

Procedure

1. On the main menu bar, click the **Administration** cogwheel > **Issues**.
2. On the Administration page, in the left column, in the ISSUE FEATURES section, click **Time Tracking**.
3. On the Time Tracking page, fill in the correct hours and days information for your organization, and activate time tracking.

Tip
You can define different types of working week in Tempo for employees who, for example, work part time or who are in different regions or countries. See the related Tempo topic below.

Related topics

- Configuring time tracking (Atlassian documentation)
- Defining a working week (Tempo documentation)

Global configuration

For users to be able to use Tempo Timesheets, you must activate JIRA time tracking. You can also configure other Tempo global configuration settings, as described in the following topics.

In this chapter

Related topic

Activating JIRA time tracking

Configuring worklog options

To open the Global Configuration:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Global Configuration** option.

Table: Worklog options explained

Option	Default	Description
Users cannot log work on parent issues	Check box is not selected (users *can* log work)	If the check box is selected, users cannot log work on JIRA issues that have sub-tasks.
Users can specify a start time when they log work	Check box is not selected	If the check box is selected, a **Time** field is added to the form that users fill out every time that they log work. Users can specify a start time for their logged work in this field. If the check box is cleared and users want to specify a start time for logged work, they must log work on the time view of the worklog calendar. See also 'Time difference between JIRA worklogs and Tempo worklogs.'
Remaining estimate is optional	Check box is not selected	If the check box is selected and an issue has no *Original estimate*, the *Remaining estimate* is not calculated in the time-tracking entry. Again if the check box is selected and an issue has Original estimate, the Remaining estimate is reduced by the time spent until the value 0 is reached. The Remaining estimate cannot be a negative number, but if it has reached 0, the user can add a new one.
Worklog description is optional	Check box is not selected	If the check box is selected and no text is written in the Log Work Description field, a default text *Working on Issue $key* is added. As with any text in the Log Work Description, the default text can still be edited.
Users can log work for closed and archived accounts	Check box is selected	If the check box is cleared, it is not possible to log work on an issue that has an account in closed status.

In this chapter

Users can log work on non-editable issues	Check box is selected	If the check box is cleared and the **`jira.issue.editable`** property is set to **false** in the JIRA workflow status, a Tempo Timesheets user cannot log work. **A few notes:** • This property is false by default in the JIRA workflow for issues in **Closed** status. • If the check box is selected, the workflow status must have a transition to **Reopened** status as in the JIRA default workflow. The user must also have a permission to execute the reopen transition. • The workflow transitions can be hidden, by using the **Hide Transition** option in the JIRA Misc Workflow Extensions plugin, if you don´t want users to reopen issues. • There is also an option to use the *jira.permission.work.denied* property as documented on this page.
Maximum hours per day per user	Unlimited	Unlimited is max 99 hours. If a *limited* value is selected from the drop-down list, the lowest value is set as the *Hours per day* in JIRA Time Tracking settings and the highest value ends in 24 Hours. The values increment by one hour from the lowest to the highest.
Users can log work up to X days into the future	90 Days	Other options, range from 0 Days to 360 Days. *0 Days* means the user cannot log work for Tomorrow. *360 Days* means that the user cannot log work on a date that is over a year from current date.

Related topic

Configuring work attributes

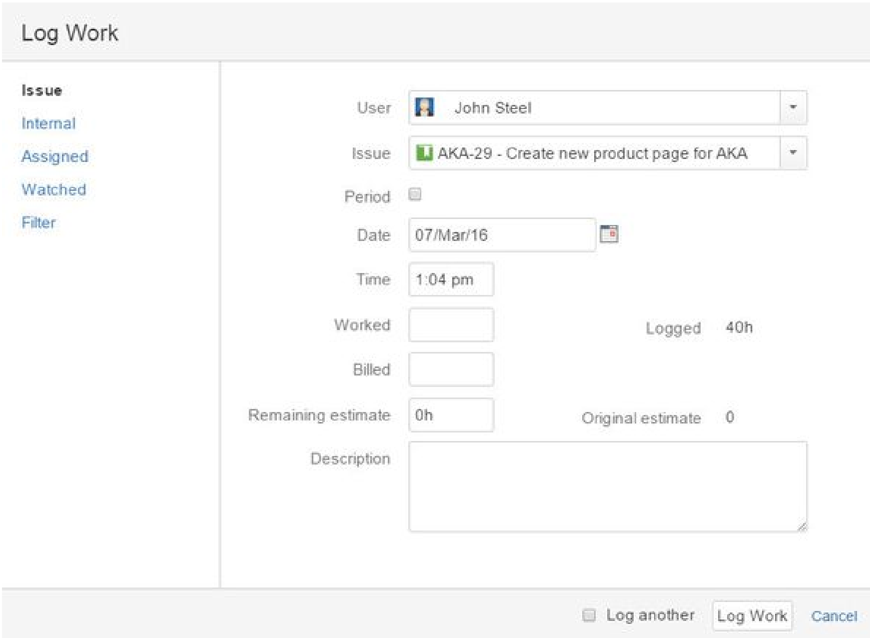
Log work with start time

This option is disabled by default, but if enabled any Tempo Timesheets user can set start time when logging work. This means that the **Date** field in the Log Work window changes to a date/time field in the enabled case. The current time is used as the default time for the current date, before the user logs the start time.

Enabling the option is not valid for the Plan Time window.

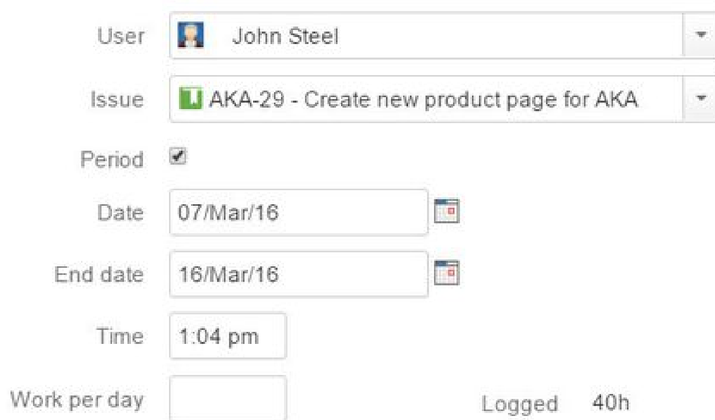
The Log Work window showing the Time field (click to enlarge)

In this chapter



Following are a few facts about this option:

- The time can be changed by writing directly into the field
- The time can also be changed by opening the calendar icon next to the field
- All dates from start date to end date in Period worklog shows the same time as selected in the Time field.



- The default time for dates other than the current date is 00:00

If the option is *enabled*, the time is also displayed in all reports and the inline editing windows.

A useful reading on the difference between my JIRA worklog and my Tempo worklog.

Configuring the timesheet approval process

To open the Global Configuration:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo** administratio n left tabs and choose the **Global Configuration** option.

Configure timesheet approval process	Default: *Disabled*

This setting can be enabled as *Monthly (Period)* or *Weekly*, or it can be *Disabled.* When enabled, a workflow status with a button next to it, called **Get Approval**, appears to the left, below the User Timesheet header. If enabled as Weekly, the view has be set on **Week** and the same goes for if enabled as Monthly (Period), the view has to be set on **Period.** Team members can send their timesheets to be approved by their Team Lead (the user(s) with the Approve Timesheet permission), if the workflow status is *Ready to submit*.

Configuring global accounting options

In this chapter

To open the Global Configuration:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Global Configuration** option.

Users with Approve Timesheet permission can set billed hours.	Default: Check box is not selected

If the check box is selected, a field called **Billed hours** is added to the Log Work window, which is visible for users with the Approve Timesheet permission (or a Team Lead). A column called **Billing** is also added to the report view. The default value in the Billed hours field is the same as in Hours, but it can be edited to a different value including 0. Team Leads can select if the Hours and/or Billed hours are displayed in the report.

Other users can set billed hours.	Default: Check box is not selected

If the check box is selected, a field called **Billed hours** is added in the Log Work window, which is visible to team members. A column called **Billing** is also added to the report view The default value in the Billed hours field is the same as in Hours, but it can be edited to a different value including 0. Team members can select if the Hours and/or Billed hours are displayed in the report.

Configuring time-planning options

In this chapter

To open the Global Configuration:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Global Configuration** option.

Time-planning options

Option	Default	Description
Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets	Check box is selected	If the check box is selected, team leads and other users with Plan Time pe for team members to work on specific JIRA projects, project versions, or p
All users can also plan time for themselves in Tempo Timesheets.	Check box is selected	If this check box and the previous check box are both selected, all users c on specific JIRA projects, project versions, or project components. A **Plan**
Enable planned-time approval process.	Check box is not selected	If the check box is selected, users can send an approval request for plann

Enabling agile timesheets

To open the Global Configuration:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo** administratio n left tabs and choose the **Global Configuration** option.

Setting	Default	Description

Users who have JIRA Software or JIRA Agile installed can view agile timesheets	Check box is selected	This setting adds a **Time Tracking** option to the **View in Tempo** menu, in the header of each JIRA Software or JIRA Agile board. It allows the user to see all worklogs associated with JIRA Software or JIRA Agile epics and/or sprints in the Agile Timesheet. This feature is currently available only for users with JIRA Software or JIRA Agile installed.

Changing date and time formats

You can change the date and time formats that are used on some pages of Tempo Timesheets; for example, you can change the following formats:

- The time format that is used in the Time view of the worklog calender
- The date format that is used in the Calendar view of user, project, team, and issue timesheets

Required permission

JIRA Administrators permission

Procedure

1. On the top menu bar, click the Administration cogwheel > **System**.
2. On the Administration page, in the left column, in the USER INTERFACE section, click **Look and Feel**.
3. Scroll down to the **Date/Time Formats** section.
4. Click the field that you want to edit.
5. Type the format that you want (see the examples below), and click **Update**.

Examples

Time Format

Description	Results	Format
24-hour clock, with times from 00:00 to 23:59	00:24 05:45 12:36 17:19	HH:mm
12-hour clock, with 'am' and 'pm' **Note**: 12 midnight is written as 12:00 am, and 12:00 noon is written as 12:00 pm. **Troubleshooting**: If the 'am' and 'pm' are not displayed on your times, the 'a' might be missing after 'h:mm'.	12:24 am 5:45 am 12:36 pm 5:19 pm	h:mm a

Day/Month/Year Format

Example used: 1 September 2016

Starting with the day

Result	Format
01/09/2016	dd/MM/yyyy
01.09.2016	dd.MM.yyyy
1/9/2016	d/M/yyyy
01/09/16	dd/MM/yy
1/9/16	d/M/yy
01 Sep 2016	dd MMM yyyy
1 Sep 2016	d MMM yyyy

01/Sep/16	dd/MMM/yy
1/Sep/16	d/MMM/yy
01 September 2016	dd MMMM yyyy
1 September 2016	d MMMM yyyy

Starting with the month

Result	Format
09/01/2016	MM/dd/yyyy
09.01.2016	MM.dd.yyyy
9/1/2016	M/d/yyyy
09/01/16	MM/dd/yy
9/1/16	M/d/yy
Sep 01, 2016	MMM dd, yyyy
Sep 1, 2016	MMM d, yyyy
Sep/01/16	MMM/dd/yy
Sep/1/16	MMM/d/yy
September 01, 2016	MMMM dd, yyyy
September 1, 2016	MMMM d, yyyy

Starting with the year

Result	Format
2016-09-01	yyyy-MM-dd
2016.09.01	yyyy.MM.dd
20160901	yyyyMMdd
2016 Sep 01	yyyy MMM dd

Tip
Atlassian's documentation provides more detailed information about date and time formats.

Granting permission to users

The tables below list the following types of permissions and roles:

- Some important JIRA permissions that Tempo Timesheets relies upon
- Tempo administrative and user permissions
- Tempo roles, such as Team Lead and Account Lead, which already include certain permissions

Important
- For JIRA users to be able to access and use Tempo Timesheets, they must have Work On Issues permission for at least one JIRA project. This permission is listed

below, in the '*Project permissions and roles*' table.
- For JIRA users to be able to log work in Tempo Timesheets, Time tracking must be ON in JIRA.

On this page

Global permissions

Permission	What you get by default	Notes	Who can give permission by default	Configuration location

JIRA Administrators permission	• Permission to:
	  ◦ Perform most JIRA administrative tasks
	  ◦ Perform most Tempo administrative tasks
	• Tempo Administrators permission (see below)
	• Tempo Team Administrators permission (see below)
	• Tempo Account Administrators permission (see below)
		By default, JIRA Administrators are not granted Tempo Rate Administrators permission (see below). However, JIRA Administrators can grant themselves any type of Tempo administrative or user permission that they do not already have.	JIRA Administrators	**Administration** cogwheel > **System** > SECURITY **Global Permissions**

Browse Users permission	Permission to view lists of JIRA user names and group names and to select users or groups from the lists.	Many users might require this permission. **Examples** • Tempo Team Administrators (see below) require Browse Users permission so that they can add members to teams. • Many users might require Browse Users permission so that they can reassign issues to other users.		
Tempo Administrators permission	Permission to: • Manage internal Issues • Open and close worklog periods • Test who can edit worklogs • Define the working week • Specify public holidays	• By default, JIRA Administrators receive Tempo Administrators permission. • Only JIRA Administrators can do some other Tempo Timesheets administrative tasks.		
Tempo Team Administrators permission	• Permission to create, configure, browse, and delete teams and to manage team permissions • Browse Team permission (see below) for all teams	• Tempo Team Administrators can grant themselves Approve Timesheet permission and Plan Time permission (see below). • Tempo Team Administrators permission is *not* sufficient for moving employees between different types of working week or sets of public holidays. • By default, JIRA Administrators receive Tempo Team Administrators permission		

Tempo Account Administrators permission	Permission to:
	• Create, configure, import, export, and delete accounts
	• Change the target revenue in account revenue reports
		• Only users with Approve Timesheet permission (see below) can approve accounts.
		• Only JIRA Administrators can configure the following account settings:
		  ◦ Whether the account value is cleared when issues are moved between projects
		  ◦ An alternative name for the account field
		  ◦ Whether an account value is required or optional in a field configuration
		• By default, JIRA Administrators receive Tempo Account Administrators permission		

Tempo Rate Administrators permission	Permission to: • Set price rates for team roles in different teams • Change the target revenue on account revenue reports	Price rates are used for revenue reports and billing.		

Project permissions and roles

Permission or role	What you get by default	Notes	Who can give permission or role by default	Configuration location
Administer Projects permission	Within the context of a project, permission to edit: • Project role membership • Project components • Project versions • Some project details		JIRA Administrators	**Projects** > **View All Projects** > *project name* > **Project Administration** > **Permissions**
Browse Projects permission	Within the context of a project, permission to: • Browse the project • Use the issue navigator • View individual issues			
Work On Issues permission	• Permission to access and use Tempo Timesheets • Within the context of a project, permission to log work on issues	**Troubleshooting tips** • JIRA users cannot access or use Tempo Timesheets if they do not have Work On Issues permission for at least one JIRA project. • JIRA users cannot log work if Time tracking is turned OFF in JIRA.		
View All Worklogs permission	Within the context of a project, permission to view all worklogs	**Troubleshooting tip** A possible reason why worklogs are not viewable is that users do not also have Browse Projects permission (see above).		
Log Work for Others permission	Within the context of a project, permission to log work on behalf of other JIRA users who have permission to log work for the project			

Tempo Project Managers role	See notes >	• This is a legacy role and might not be available in your Tempo Timesheets. • If this role is available, users in this role no longer automatically have permission to view all worklogs of a project. However, you might have granted users in this role other permissions, which are still valid.	• Project Administrators • JIRA Administrators	**Projects** > **View All Projects** > *project name* > **Project Administration** > **Roles**

Team permissions and roles

Permission or role	What you get by default	Notes	Who can give permission or role by default	Configuration location
Tempo Team Administrators permission	See the '*Global permissions*' table above.			
Team Lead role	• Browse Team permission (see below) for the team that you lead • Approve Timesheet permission (see below) for the team that you lead • Plan Time permission (see below) for the team that you lead • Permission to configure your team • Team Member role	The Team Lead role is *not* sufficient for moving employees between workload or holiday schemes or for changing the Team Lead.	Tempo Team Administrators	You can specify a Team Lead when you create a team: **Tempo** > TEAMS **more** > **Create New Team** or by configuring basic team information: **Tempo** > TEAMS **more** > *team name* > **Configuration** > **Configure** > Team Lead
Team Member role	• Browse Team permission for your team (see below) • Permission to plan time for yourself to work on projects, versions, components, and issues	• For you to be able to plan time for yourself to work on an issue, you must also have Browse Projects and 'Work on Issues' permission (see above) for the issue's project. • Team Leads (see above) are also Team Members.	• Team Leads • Tempo Team Administrators	**Tempo** > TEAMS **more** > *team name* > **Configuration** > **Members**

Customized roles, such as Developer, Tester, or Scrum Master	See notes >	By default, Team Members are given the role name *Member*. However, you can give customized role names, such as *Developer*, *Tester*, or *Scrum Master*, to Team Members. When you customize role names, the permission that the Team Members have does not change.	• JIRA Administrators can create customized role names: **Administration** cogwheel > **Add-ons** > TEMPO TEAMS **Tempo Roles** • Team Leads and Tempo Team Administrators can assign role names to Team Members when they add or configure Team Members: **Tempo** > TEAMS **more** > *team name* > **Configuration** > **Members**
Browse Team permission	Permission to: • See the team's information, including the team utilization report • Select this team on forms that contain a **Team** field (for example, the **Team** field in an issue)	All Team Members automatically receive Browse Team permission for their own teams.	**Tempo** > TEAMS **more** > *team name* > **Configuration** > **Permissions**

Approve Timesheet permission	• Permission to:
	  ◦ Review timesheets of Team Members.
	  ◦ Grant grace periods to Team Members to complete their timesheets after a scheduled closing date.
	  ◦ View the team timesheet and reports.
	  ◦ View Tempo team and account gadgets.
	  ◦ Approve accounts.
	• If the setting 'Configure timesheet approval process' is set to *Monthly (Period)* or *Weekly*, permission to:
	  ◦ Approve and reject timesheets of Team Members
	  ◦ View the approval logs of Team Members
	• Permission to set billed hours if the following check box is selected in Tempo Global Configuration: Users with Approve Timesheet Permission can set billed hours
		• Team Leads (see above) automatically receive Approve Timesheet permission for their own teams.
		• Tempo Team Administrators (see above) can grant themselves Approve Timesheet permission
		• To view other team members' worklogs on a timesheet, you must have View All Worklogs permission (see above) for the team's projects		

Plan Time permission	Permission to plan time for team members to work on projects, versions, components, and issues.	• Team Members can plan time for themselves *without* the Plan Time permission.
		• Team Leads (see above) automatically receive Plan Time permission for their own teams.
		• Tempo Team Administrators (see above) can grant themselves Plan Time permission
		• Plan Time permission works in Tempo Timesheets only if the following check box is selected in Tempo Global Configuration: 'Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets.'
		• For you to be able to plan time on an issue, the following permissions must also be granted:
		  ◦ You and the user that you are planning time for must have Browse Projects permission (see above) for the issue's project
		  ◦ The user that you are planning time for must have 'Work on Issues' permission (see above) for the issue's project		

Customer and account permissions and roles

Permission or role	What you get by default	Notes	Who can give permission or role by default	Configuration location

Tempo Account Administrators permission	See the '*Global permissions*' table above.			
Tempo Rate Administrators permission	See the '*Global permissions*' table above.			
Account Lead role	• Responsibility for the account • Browse Customer Revenue permission (see below) if you are a user of JIRA and Tempo Timesheets	Account Leads are not required to be users of JIRA and Tempo Timesheets.	• Tempo Account Administrators • JIRA Administrators	You can specify an Account Lead when you create an account: **Tempo** > ACCOUNTS **more** > **Create Account** or by configuring basic account information: **Tempo** > ACCOUNTS **more** > *account name* > **Configuration** > **General** > Lead
Browse Customer Revenue permission	Permission to view the account revenue report and the time and expenses report for accounts that are associated with a customer.	Account Leads automatically receive Browse Customer Revenue permission for all customers.		**Tempo** > ACCOUNTS **more** > **Manage** > **Customers** > **View Customer** > **Configuration**

Related topics

- Global configuration (Settings that affect the permissions of general users and of users with Approve Timesheet permission)
- Troubleshooting a No Access message
- Troubleshooting worklog editing

Troubleshooting a No Access message

In this chapter

When users get the *No Access* notification in Tempo Timesheets it means the current user doesn't have JIRA *Browse Projects* permission for the particular project in question. Users without this permission can't view any project issues or worklogs.

Why is No Access displayed

No Access is displayed in Team Timesheet if the user who is viewing has Approve Timesheet permission. The reason for this is to inform this user that members in the team have logged work on issues that you can not browse in JIRA. The users who are Approving User Timesheets for the members need to know that there are more hours logged by the selected user so you need to keep that in mind before approving the timesheet.

This is also displayed in the User Timesheet for the selected user if viewed by the *Timesheet Reviewer*.

More information on how to Manage Project Permission in JIRA can be found here:

- Managing Project Permissions

Troubleshooting worklog editing

Below you find the reasons for the fact if you can´t edit own or all worklogs in Tempo Timesheets

In this chapter

Issue not Editable

JIRA allows administrators to define workflow states where issues can not be edited. All Issues and associated worklogs in this state can not be edited. In order to edit worklogs not editable for this reason:

- As a JIRA user
  - Try transitioning the issue to an editable status in the workflow (e.g. from Closed to Reopened).
- As a JIRA Administrator
  - Edit the JIRA workflow status and set the 'Issue.editable' property as true.
  - See information about the **Users can log work on non-editable issues** setting.

You lack permission to "Work On Issues"

If you have this permission for at least one project, you can access Tempo Timesheets. However, you cannot create worklogs for issues in other projects for which you do not have this permission.

- To grant this permission to users, as a JIRA Administrator, open the Project Permission Scheme for the project.
  - Grant the users permission to "Work On Issues" by following the steps under the title 'Adding Users, Groups or Roles to a Permission Scheme' on the following page: Managing JIRA Project Permissions.

You lack permission to "Edit Own Worklogs"

JIRA defines this project permission in order to allow JIRA administrators to manage if users can edit their own worklogs or not. In order to allow users to edit their own worklogs:

- As a JIRA Administrator open the Project Permission Scheme for the project in question
  - Grant the user in question permission to "Edit Own Worklogs" by following the steps under the title 'Adding Users, Groups or Roles to a Permission Scheme' on the following page
  - Managing JIRA Project Permissions

You lack permission to "Edit All Worklogs"

JIRA defines this project permission in order to allow JIRA administrators to manage which users can edit all worklogs within a particular project. In order to allow users to edit all worklogs within a project:

- As a JIRA Administrator open the Project Permission Scheme for the project in question
  - Grant the user in question permission to "Edit All Worklogs" by following the steps under the title 'Adding Users, Groups or Roles to a Permission Scheme' on the following page
  - Managing JIRA Project Permissions

You lack permission to "Log Work for Others"

JIRA defines this project permission in order to allow JIRA administrators to manage which users can log work for other users within a particular project. You might be able to edit your own worklogs, but you need this permission to edit worklogs from other users. In order to allow users to edit all worklogs within a project:

- As a JIRA Administrator open the Project Permission Scheme for the project in question
  - Grant the user in question permission to "Log Work for Others" by following the steps under the title 'Adding Users, Groups or Roles to a Permission Scheme' on the following page
  - Managing JIRA Project Permissions

Week is closed

Tempo enables Tempo administrators to automatically schedule week closure within an Open Period using the Tempo Scheduler. In order to edit worklogs currently not editable for this reason:

- As an user with Approve Timesheet permission
  - Give the user in question a Grace Period

User Timesheet is not Open

In the Timesheet Approval process if the Timesheet has already been approved or is pending approval underlying worklogs can not be edited. In order to edit worklogs currently not editable for this reason:

- As an user with the Approve Timesheet permission
  - In case of Approved Timesheets - Reopen the timesheet
  - In case of Timesheets Pending Approval - Reject the Timesheet

Period is closed

Tempo enables Tempo Administrators to control when users can Log Work on issues, e.g. is the period still open. This is configured using Period management. In order to edit worklogs currently not editable for this reason:

- As a Tempo Administrator
  - Open the period in question from the Period management page

Account has been closed

Tempo account administrators might close accounts that users may no longer log work to. To edit worklogs that are associated with closed accounts, do one of the following tasks:

- As a Tempo account administrator, re-open the account
- As a JIRA administrator, select the check box for the following setting on the Tempo Global configuration page: **Users can log work for closed and archived accounts**

Approve Timesheet permission

Permission or role	What you get by default	Notes	Who can give permission or role by default	Configuration location

Approve Timesheet permission	• Permission to:
	  ◦ Review timesheets of Team Members
	  ◦ Grant grace periods to Team Members to complete their timesheets after a scheduled closing date
	  ◦ View the team timesheet and reports
	  ◦ View Tempo team and account gadgets
	  ◦ Approve accounts
	• If the setting 'Configure timesheet approval process' is set to *Monthly (Period)* or *Weekly*, permission to:
	  ◦ Approve and reject timesheets of Team Members
	  ◦ View the approval logs of Team Members
	• Permission to set billed hours if the following check box is selected in Tempo Global Configuration: Users with Approve Timesheet Permission can set billed hours
		• Team Leads automatically receive Approve Timesheet permission for their own teams.
		• Tempo Team Administrators can grant themselves Approve Timesheet permission
		• To view other team members' worklogs on a timesheet, you must have View All Worklogs permission for the team's projects
			• Team Leads
			• Tempo Team Administrators
				Tempo > TEAMS **more** > *team name* > **Configuration** > **Permissions**
				
				For more information, see Team permissions.

Defining a working week

Extract from **Tempo Core** (plug-in) version: 4.x.x

Employee work requirements depend on the definition of a working week. Employees that are geographically dispersed might have different working weeks. Also, some employees in your organization might work part-time. You can change the days and number of hours that comprise a working week.

Each type of working week is defined in a *workload scheme*.

Related topic

Specifying public holidays

Creating types of working weeks

Extract from **Tempo Core** (plug-in) version: 4.x.x

You might want to create multiple workload schemes (that is, types of working weeks) if different employees have different weekend days or work different numbers of hours.

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Tutorial

The following Tempo Planner video tutorial is valid also for other Tempo products.

The tutorial covers two topics:

- **Creating a workload scheme** (video time point 0:00)
- Moving an employee to a workload scheme (video time point 2:01)

Procedure

To create a workload scheme, complete the following steps:

1. Do one of the following tasks:
    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.
2. In the left column, in the **Tempo** section, click **Workload Schemes**.

    Tip
    Workload schemes contain information about the days and hours in different types of working weeks. The Tempo Default Workload Scheme is created when the Tempo Core system plugin is first installed. This scheme is initially set to contain five 8-hour working days, from Monday to Friday, with the weekend on Saturday and Sunday. If you change this scheme, your changes are not lost whenever you update the Tempo Core system plugin.

3. Click **Add Scheme**.
4. In the **Add Scheme** window, fill in the information that is requested, and click **Save**. The new workload scheme, with information about the new type of working week, is added to the list.

    Tip
    You can set any scheme as the default scheme by clicking **Set Default** in the scheme row. New users of Tempo products are associated with the default scheme.

What to do next

Move employees to the new workload scheme.

Related topic

Creating sets of public holidays

Editing types of working weeks

Extract from **Tempo Core** (plug-in) version: 4.x.x

Required permission

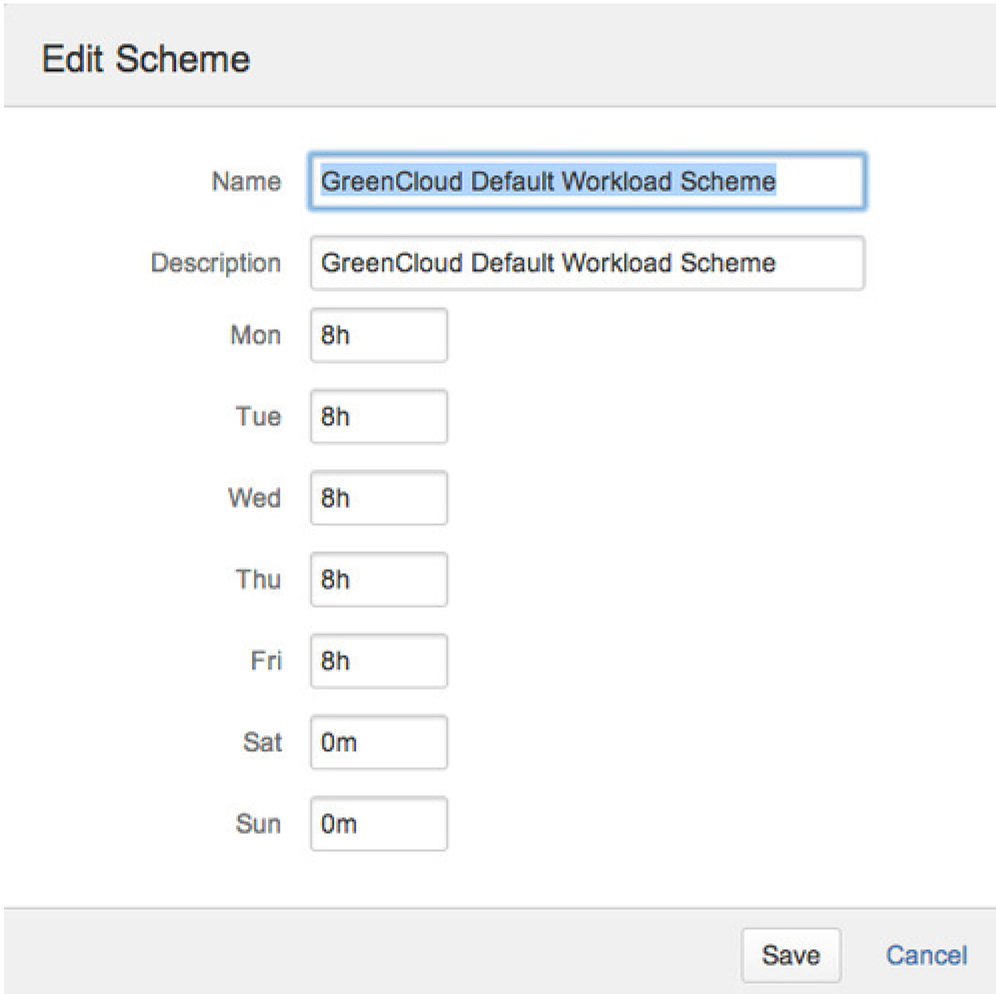
One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Procedure

To edit a workload scheme (that is, type of working week), complete the following steps:

1. Do one of the following tasks:
    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.
2. In the left column, in the **Tempo** section, click **Workload Schemes**.
3. In the row of the workload scheme, click **Edit**.
4. In the Edit Scheme window, fill in the information about the working week, and click **Save**.



Related topics

- Switching types of working weeks
- Setting the default type of working week

Switching types of working weeks

Extract from **Tempo Core** (plug-in) version: 4.x.x

If employees move to a different country, with different weekend days, or if employees change between part-time work and full-time work, you can move the employees to a different workload scheme (that is, type of working week).

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Tutorial

The following Tempo Planner video tutorial is valid also for other Tempo products.

The tutorial covers two topics:

- Creating a workload scheme (video time point 0:00)
- **Moving an employee to a workload scheme** (video time point 2:01)

Procedure

To move an employee to a workload scheme, complete the following steps:

1. Do one of the following tasks:
   - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
   - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.
2. In the left column, in the **Tempo** section, click **Workload Schemes**.
3. In the row of the employee's current scheme, in the **Operations** column, click **Members**.
4. In the employee row, click **Move**.
5. Select the new scheme, and click **Move**.
6. Click **View Schemes**.
7. In the new-scheme row, click **Members**. Here you see that the employee is now associated with the new scheme.

Related topics

- Switching sets of public holidays
- Switching type of working week (alternative method)

Setting the default type of working week

Extract from **Tempo Core** (plug-in) version: 4.x.x

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Procedure

To set the default workload scheme (that is, type of working week) for new Tempo users, complete the following steps:

1. Do one of the following tasks:
   - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
   - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.
2. In the left column, in the **Tempo** section, click **Workload Schemes**.
3. In the row of the workload scheme that you want to set as the default scheme, click **Set Default**, and then click **Save**. The default scheme moves to the top of the list.

Tips

- The scheme that has the name "Tempo Default Workload Scheme" is created when the Tempo Core system plugin is installed *for the first time*. This scheme is initially set to contain five 8-hour working days, from Monday to Friday, with

the weekend on Saturday and Sunday. Although this scheme might keep the name "Tempo Default Workload Scheme," it is no longer the default scheme if it is not at the top of the list.
- If you change the "Tempo Default Workload Scheme", your changes are *not* lost whenever you *update* the Tempo Core system plugin.

Related Topic

Setting the default set of public holidays

Deleting types of working weeks

Extract from **Tempo Core** (plug-in) version: 4.x.x

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Procedure

To delete a workload scheme (that is, type of working week), complete the following steps:

1. Do one of the following tasks:
    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.
2. In the left column, in the **Tempo** section, click **Workload Schemes**.
3. If the workload scheme has members, move the members to another scheme.
4. If the workload scheme is the first scheme in the list, set a different scheme as the default scheme for new Tempo users.
5. In the row of the workload scheme, click **Delete**.

Related topics

- Switching types of working weeks
- Setting the default type of working week
- Deleting sets of public holidays

Specifying public holidays

Extract from **Tempo Core** (plug-in) version: 4.x.x

Employee work requirements depend on which days are public holidays. You can create different sets of public holidays for your company's employees who are based, for example, in different countries, states, or regions.

A *holiday scheme* is a set of public holidays. Holiday schemes do *not* contain information about personal vacation days.

Related topic

Defining a working week

Creating sets of public holidays

Extract from **Tempo Core** (plug-in) version: 4.x.x

You might want to create multiple holiday schemes (that is, sets of public holidays) if your company's employees are based in, for example, different countries, states, or regions, each with its own public holidays.

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Procedure

To create a holiday scheme, complete the following steps:

1. Do one of the following tasks:
    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.
2. In the left column, in the **Tempo** section, click **Holiday Schemes**.
3. On the first line of the table, fill in the fields for a new holiday scheme.

    Example
    The name of the scheme might be "Kuala Lumpur Office," and the description might be "Malaysian national holidays."

4. Click **Add**. The new holiday scheme is added to the list.

What to do next

- Add public holidays to the scheme
- Move employees to the scheme

Related topic

Creating types of working weeks

Adding days to sets of public holidays

Extract from **Tempo Core** (plug-in) version: 4.x.x

Holiday schemes are sets of public holidays. You can add new public holidays to holiday schemes.

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Tutorial

The following Tempo Planner video tutorial is valid also for other Tempo products.

The tutorial covers two topics:

- Adding a public holiday to a holiday scheme (video time point 0:00)
- Moving an employee to a holiday scheme (video time point 1:33)

Procedure

To add a public holiday to a holiday scheme, complete the following steps:

1. Do one of the following tasks:
    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.
2. In the left column, in the **Tempo** section, click **Holiday Schemes**.
3. In the row of the holiday scheme, click **Configure**.
4. On the first line of the table, fill in the fields for a new public holiday.

    Tips
    - You can specify a one-day holiday by entering "1d" in the duration field. You can specify a half-day holiday by entering, for example, "4h" (that is, 4 hours) in the duration field.
    - You can create *fixed* and *floating* public holidays. Fixed holidays occur on the same date every year, while floating holidays can change date from one year to the next. For fixed holidays, you must specify the date and month. For floating holidays, you must also specify the year and create a separate entry for each year.
5. Click **Add**. The new public holiday is added to the list.

Switching sets of public holidays

Extract from **Tempo Core** (plug-in) version: 4.x.x

If employees move to a different country, state, or region, you might be required to move them to a different holiday scheme (that is, set of public holidays).

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Tutorial

The following Tempo Planner video tutorial is valid also for other Tempo products.

The tutorial covers two topics:

- Adding a public holiday to a holiday scheme (video time point 0:00)
- Moving an employee to a holiday scheme (video time point 1:33)

Procedure

To move an employee to a holiday scheme, complete the following steps:

1. Do one of the following tasks:

    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.

2. In the left column, in the **Tempo** section, click **Holiday Schemes**.

3. In the row of the holiday scheme that the employee is a member of, click **Members**.

    > **Tip**
    > If you are moving this employee for the first time, you are likely to find the employee's name among the members of the first scheme in the list, which is the default scheme.

4. In the employee's row, click **Move**.

5. Select the destination holiday scheme for the employee, and click **Move**.

Related topics

- Adding days to sets of public holidays
- Setting the default set of public holidays
- Switching types of working weeks

- Switching set of public holidays (alternative method)

Setting the default set of public holidays

Extract from **Tempo Core** (plug-in) version: 4.x.x

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Procedure

To set the default holiday scheme (that is, set of public holidays) for new Tempo users, complete the following steps:

1. Do one of the following tasks:

    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.

2. In the left column, in the **Tempo** section, click **Holiday Schemes**.

3. In the row of the holiday scheme that you want to set as the default scheme, click **Set Default**. The default scheme moves to the top of the list.

    > **Tips**
    > - The scheme that has the name "Default Holiday Scheme" is created when the Tempo Core system plugin is installed *for the first time*. This scheme initially contains no public holidays. Although this scheme might keep the name "Default Holiday Scheme," it is no longer the default scheme if it is not at the top of the list.
    > - If you add public holidays and members to the "Default Holiday Scheme" or to other schemes, your changes are *not* deleted whenever you *update* the Tempo Core system plugin.

Related topic

Setting the default type of working week

Deleting days from sets of public holidays

Extract from **Tempo Core** (plug-in) version: 4.x.x

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Procedure

To delete a public holiday from a holiday scheme (that is, set of public holidays), complete the following steps:

1. Do one of the following tasks:
    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.
2. In the left column, in the **Tempo** section, click **Holiday Schemes**.
3. In the row of the holiday scheme, click **Configure**.
4. In the row of the public holiday that you want to delete, click **Delete**.
5. In the Delete Holiday window, click **Delete**.

Deleting sets of public holidays

Extract from **Tempo Core** (plug-in) version: 4.x.x

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Procedure

To delete a holiday scheme (that is, set of public holidays), complete the following steps:

1. Do one of the following tasks:
    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, and Tempo Timesheets is installed, on the top menu bar, click **Tempo** > **Administration**.
2. In the left column, in the **Tempo** section, click **Holiday Schemes**.

3. If the holiday scheme has members, move the members to another scheme.

4. If the holiday scheme is the first scheme in the list, set a different scheme as the default scheme for new Tempo users.

5. In the row of the holiday scheme, click **Delete**.

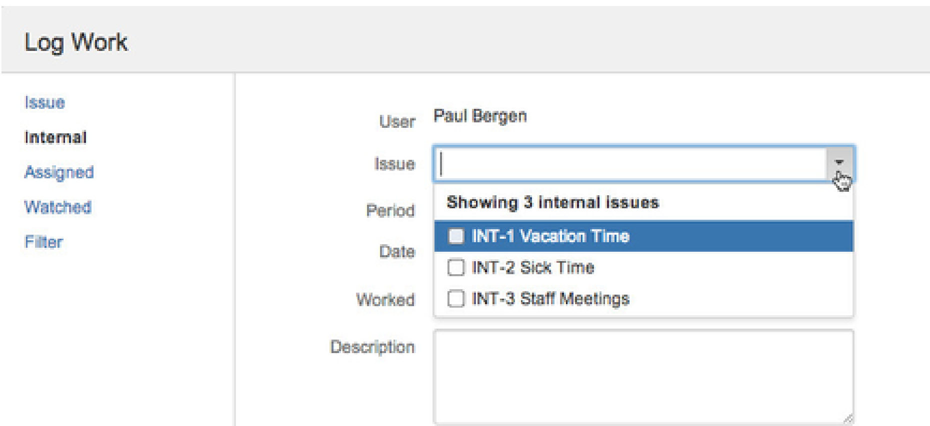
Related topics

- Switching sets of public holidays
- Setting the default set of public holidays
- Deleting types of working weeks

Configuring internal issues and activities

Internal Issues

Internal Issues are used to log work on common issues like vacations, sickness and staff meetings. Remaining estimate is not required for issues that are configured as Internal Issues.

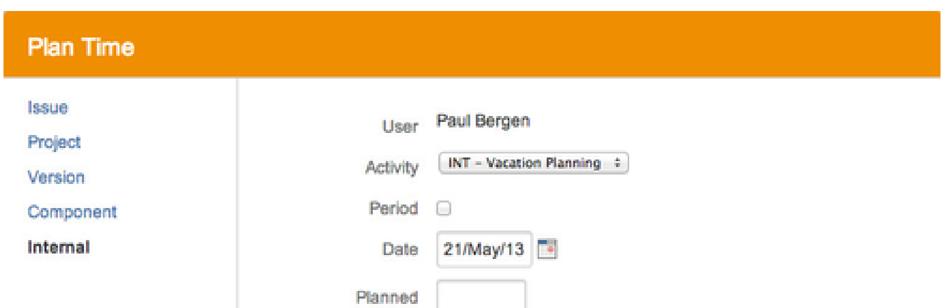


In this chapter

Video

Internal Activities

Internal Activities are only used in Planning and if configured an option is displayed in the Tempo Plan Time window.



Configure internal issues

To access **Internal Issues** take the following steps:

1. Log in as a user with Tempo Administrators permission.
2. Select **Administration** from the **Tempo drop-down menu** in the top navigation bar, choose **Internal Issues**.

In this chapter

Internal Issues

Internal issues is intended for **logging work** against issues that are common to users like vacation and sickness hours.

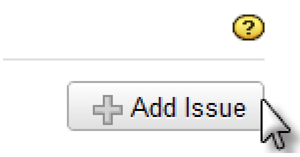
An issue can be selected from existing JIRA issues and modified into an **Internal Issue**.
An internal issue has the following properties:

- No remaining estimate is required.
- The issue can be selected from a list in the **Log Work window**.
- Depending on where users log work on an internal issue, they require different permission for the JIRA project that the issue belongs to:
  - On any timesheet, they require Work On Issues permission
  - On the worklog calendar, they require Browse Projects permission and Work On Issues permission

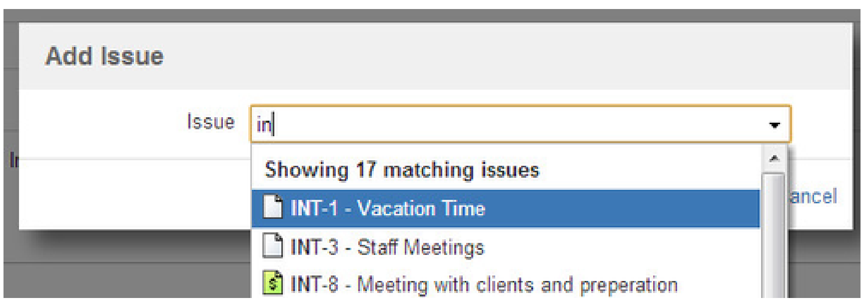
  Users that don't have Work On Issues permission in a JIRA project that has issues selected as internal will not see those issues in their list.

To add an issue to the **Internal Issue** list, do the following:

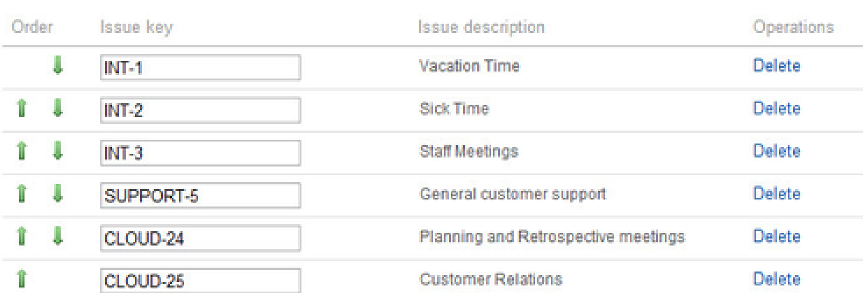
1. Click on the **Add Issue** button.



2. The **Internal Issue window** will display.



3. Select the issue from the **Issue key** field
4. Click the **Save** button.



You can change the list order by using the **Up** and **Down** icons. This is the display Issue drop-down order in the Log Work window on the Internal tab.

Configure internal activities

To access **Internal Issues** take the following steps:

1. Log in as a user with the Tempo Administrators permission.
2. Select **Administration** from the **Tempo drop-down menu** in the top navigation bar, choose **Internal Issues**.

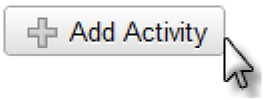
In this chapter

Internal Activity

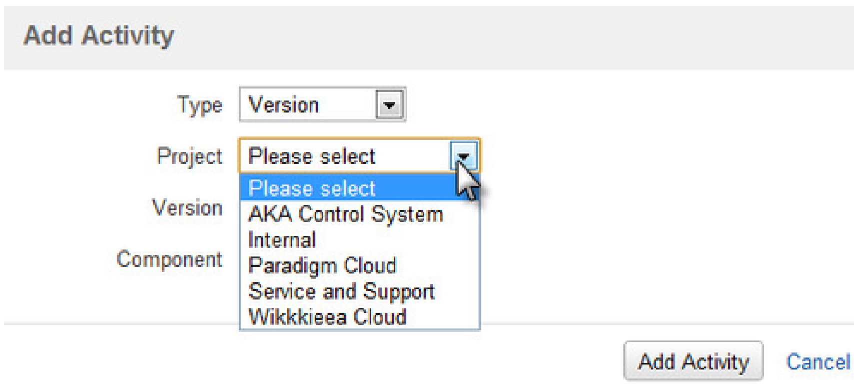
Activity is a **Project**, **Version** or a **Component**.
Internal activity is intended for vacation **planning** and other 'out of office' time allocation.

To add an **Internal Activity** , do the following:

1. Click on the **Add Activity** button.

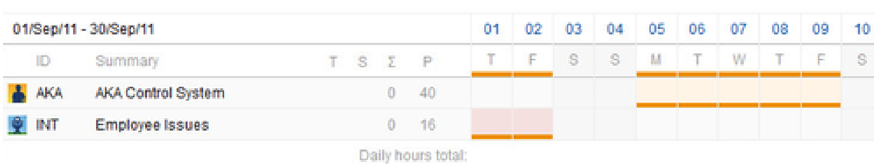


2. The **Add Activity** window is displayed;

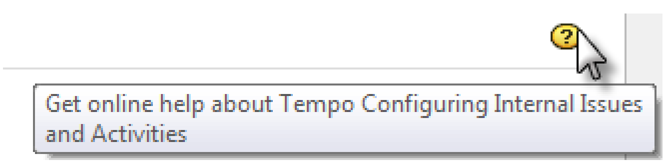


3. Select **Type** - **Unscheduled**, **Version** or **Component**
   Select **Unscheduled** of you want to plan on a **Project** level.
4. Select **Project** from a list of JIRA projects.
5. Select **Version** or **Component** according to your select in the **Type** field.
6. Click the **Add Activity** to save your select or **Cancel** to close without saving.

In the user timesheet the internal activities are displayed with a **different color** than other time allocations for the user.



Click the **Help** icon on the top right of the page to open the online documentation

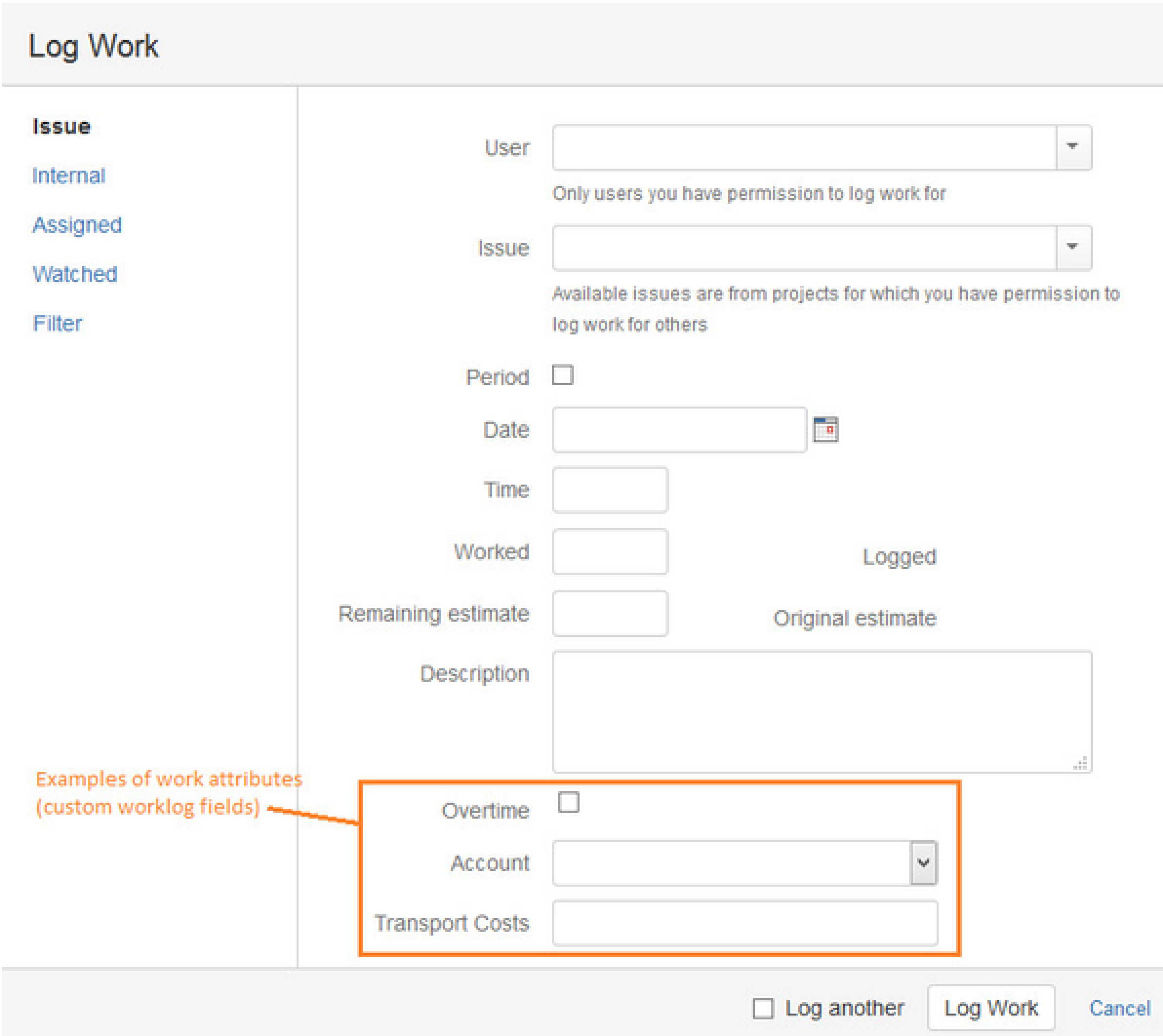


Configuring work attributes

Extract from **Tempo Core** (plug-in) version: 4.x.x

Product: Tempo Timesheets 8.2

Just as you can add custom issue fields to JIRA issues, you can add custom work-log fields (for example, an **Account** field or an **Overtime** field) to Tempo Timesheets work logs. Custom work-log fields are called *work attributes* and can be of various types (text fields, numeric fields, drop-down lists, or checkboxes). Users can also display the content of the fields in timesheet reports and lists.



Types of work attributes

Type	Name	Notes
Input fields	Numeric input field	
	Input field	A text field.
Drop-down lists	Static list	A simple drop-down list. You define the list items in Tempo Timesheets when you add or edit the list.
	Account	A drop-down list of accounts that users can choose from. You can create only one **Account** drop-down list for work logs. **Tip** *JIRA issues* can also include an **Account** drop-down list, which is a JIRA custom field, not a work attribute. If users select an account on a work log, the hours are logged to that account and not to any account that is selected on the JIRA issue.
	Dynamic dropdown	An externally sourced drop-down list. You define the list items in an external service that connects to Tempo Timesheets.
Checkbox	Checkbox	

Procedures

- Adding custom fields to worklogs
- Configuring external drop-down lists for worklogs
- Changing the order of custom fields on worklogs
- Editing custom fields on worklogs
- Deleting custom fields from worklogs

Related topics

- Configuring and managing accounts
- Including an **Account** drop-down list on JIRA issues: See 'Accounts custom field.'
- Displaying work attributes in timesheet reports and lists: See 'Additional rows and columns.'

Adding custom fields to worklogs

Extract from **Tempo Core** (plug-in) version: 4.x.x

You can add custom fields to the form that users fill out when they log work. Custom fields on work logs are called *work attributes*.

Product

Tempo Timesheets 8.2

Required permission

JIRA Administrators

Before you begin

- If the type of custom field that you want to add to work logs is a *dynamic dropdown* (that is, a drop-down list for which list items are fetched from an external service), complete the steps on the page Configuring external drop-down lists for worklogs.
- If the type of custom field that you want to add is an *account* drop-down list, ensure that one or more accounts are linked to projects.

Procedure

To add a custom field to work logs, complete the following steps:

1. On the top menu bar, click the **Administration** cogwheel > **Add-ons**.
2. In the left column, in the TEMPO section, click **Work Attributes**.
3. On the first line of the table, fill in the requested information.

    - In the **Type** field, if you select **Static List** (that is, a simple drop-down list), add items to the list by completing the following steps:

        a. In the **URL or list items** column, click **Configure list values**.
        b. Add list items and click **Save**.

    - In the **Type** field, if you select **Dynamic Dropdown** (that is, an externally sourced drop-down list), complete the following steps:

        a. In the **URL or list items** column, click the link.
        b. In the **API URL** field, enter the URL for fetching drop-down list items from an external service. For example, you might want to create a custom field called **Operations** on the Log Work form and have users choose an operation from a drop-down list. The URL is used to fetch the list of operations.

            URL Example:

            `http(s)://www.acme.com/jsonp/operations`

            where you have configured the external service (at www.acme.com) to recognize the URL and return a list of operations in a standard format (see the 'Before you begin' section above).

> **Tips**
>
> - Do *not* add **`?callback=?`** to the URL. Tempo Timesheets automatically appends **`?callback=?`** to the URL when the request is sent to the external service.
> - You can set up the external service to return different items for the drop-down list depending on the following parameters:
>   - The JIRA username of the user for whom work is logged. In this case, add **`/{author}`** to the end of the URL. For example:
>
>     ```
>     http(s)://www.acme.com/jsonp/operations/{author}
>     ```
>
>   - The issue that users log work to. In this case, add **`/{IssueKey}`** to the end of the URL. For example:
>
>     ```
>     http(s)://www.acme.com/jsonp/operations/{IssueKey}
>     ```
>
>   - The item that is selected in a custom field *on the issue*. In this case, add the name of the custom field between curly brackets to the end of the URL. For example, for the **Account** custom field, add **`/{Account}`** to the end of the URL. For example:
>
>     ```
>     http(s)://www.acme.com/jsonp/operations/{Account}
>     ```
>
>   - The name of the custom field can contain spaces; for example **`{Epic Name}`**.
>   - The name of the custom field is case sensitive. You must type the name of the custom field with the same capitalization that the custom field has on issues.
>   - The account that the user selects in the **Account** custom field (work attribute) *on the Log Work form*. In this case, add **`/{_Account_}`** to the end of the URL. There is one underscore on either side of the word *Account*. For example:
>
>     ```
>     http(s)://www.acme.com/jsonp/operations/{_Account_}
>     ```

c. Click **Save**.

4. Click **Add**.

Configuring external drop-down lists for worklogs

Extract from **Tempo Core** (plug-in) version: 4.x.x

When users log work, they fill out a Log Work form. You can add custom work-log fields (*work attributes*) to the form. One type of custom work-log field is a drop-down list that retrieves list items from an external service. These externally sourced drop-down lists are called *dynamic dropdowns*. You define the list items in the external service, which connects to Tempo Timesheets.

Product

Tempo Timesheets 8.2

Required permission

JIRA Administrators

Before you begin

Learn about how JSONP works on the following IBM page: http://www.ibm.com/developerworks/library/wa-aj-jsonp1/

About this task

In the procedure below, the following example is used:

> You want to add a custom work-log field called **Operations** to Log Work forms so that users can choose an operation from a drop-down list. Tempo Timesheets sends a request to an external service to fetch the list of operations. A URL is included in the request. In Tempo Timesheets, in the Administration section, on the Work Attributes page, the URL that is specified for the external service is in the following form:
>
> `http(s)://www.acme.com/jsonp/operations`
>
> Tempo Timesheets automatically appends **`?callback=?`** to the URL when the request is sent to the external service. For example:
>
> `http(s)://www.acme.com/jsonp/operations?callback=?`
>
> At run-time, a callback parameter is generated (for example, **`fn`**), and the JSONP library replaces the second question mark in the URL with the callback parameter.

Procedure

To configure an externally sourced drop-down list, set up the external service so that, when Tempo Timesheets sends the request, the external service returns a list of operations as a simple key-value list in the following JSONP (not JSON) code format:

Example: JSONP JavaScript with callback named "fn"

```
fn(
  {"values":
   [
     {
       "key":"",
       "value":"Please select..."
     },
     {
       "key":"0100",
       "value":"This is option ONE"
     },
     {
       "key":"0200",
       "value":"And here is option TWO"
     }
   ]
 }
)
```

Function and variables

`fn`	In this example, the callback function name is 'fn'. The external service must use the callback parameter (see 'About this task' above) as the callback function name.
`values`	Variables that Tempo Timesheets understands. An array that is called '*values*' must be returned and must contain objects with '*key*'-'*value*' pairs.

`key`	
`value`	

Making the returned values depend on another selected value

You can set up the external service to return different items for the drop-down list depending on the following parameters:

- The JIRA username of the user for whom work is logged. In this case, the URL in the request that Tempo Timesheets sends to the external service contains the JIRA username. For example:

  `http(s)://www.acme.com/jsonp/operations/taylor?callback=?`

  where **`taylor`** is the JIRA username of the person for whom work is logged.

- The issue that users log work to. In this case, the URL in the request that Tempo Timesheets sends to the external service contains the issue *key*. For example:

  `http(s)://www.acme.com/jsonp/operations/TO-21?callback=?`

  where **`TO-21`** is the key of the issue that the user logs work to.

- The item that is selected in a custom field on the *issue*. In this case, the URL in the request that Tempo Timesheets sends to the external service contains the *key* of the item that is selected in the custom field on the issue. For example, for the **Account** custom field on the issue, the URL contains the key of the selected account. For example:

  `http(s)://www.acme.com/jsonp/operations/201500?callback=?`

  where **`201500`** is the key of the selected account.

- The account that the user selects in the **Account** custom field (work attribute) on the *Log Work form*. In this case, the URL in the request that Tempo Timesheets sends to the external service contains the *key* of the selected account. For example:

  `http(s)://www.acme.com/jsonp/operations/201501?callback=?`

  where **`201501`** is the key of the selected account.

What to do next

Add the custom field (work attribute) to worklogs.

Changing the order of custom fields on worklogs

Extract from **Tempo Core** (plug-in) versio
n: 4.x.x

Product

Tempo Timesheets 8.2

Required permission

JIRA Administrators

Procedure

To change the order of custom work-log fields (*work attributes*), complete the following steps:

1. On the top menu bar, click the **Administration** cogwheel > **Add-ons**.
2. In the left column, in the **Tempo** section, click **Work Attributes**.
3. Re-order the fields by dragging and droping rows in the table.

Editing custom fields on worklogs

Extract from **Tempo Core** (plug-in) version: 4.x.x

Product

Tempo Timesheets 8.2

Required permission

JIRA Administrators

Procedure

To edit a custom work-log field (*work attribute*), complete the following steps:

1. On the top menu bar, click the **Administration** cogwheel > **Add-ons**.
2. In the left column, in the **Tempo** section, click **Work Attributes**.
3. In the table of work attributes, click an item, and edit the item.

> **Restriction**
> You cannot edit the *type* of a work attribute.

Deleting custom fields from worklogs

Extract from **Tempo Core** (plug-in) version: 4.x.x

Product

Tempo Timesheets 8.2

Required permission

JIRA Administrators

Procedure

To delete a custom work-log field (*work attribute*), complete the following steps:

1. On the top menu bar, click the **Administration** cogwheel > **Add-ons**.
2. In the left column, in the **Tempo** section, click **Work Attributes**.
3. In the row of the field that you want to delete, click **Delete**.

Periods in Tempo Timesheets

In this chapter

Periods are used in Tempo Timesheets to display data in all the available Timesheet views except Agile Timesheet.

The Date navigation defaults on current period and users can navigate to other periods that defaults to a calendar month. This can be configured in Tempo Administration if preferred.

You can prevent new worklogs in older periods by closing periods in Period management. The Account Approval Process is also depending on the period statuses in Period Management.

In addition Timesheet Approval Process and Tempo Scheduler can be configured to use Tempo Periods along with other options.

Configuring periods and week start day

In this chapter

In order to select the dates for the two periods that are used, access Tempo Period with the following steps:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Period** option.

Period

The default selection for period is **1. January** and can be changed by taking the following steps:

1. Select the **Start** date.
   The **End date** is equal to (Start date – 1).
2. Select the **Start month**: December or January.

The selected period is now period number 0111, (**First period of 2011**). The period is displayed in the **Timesheet** period view by default.

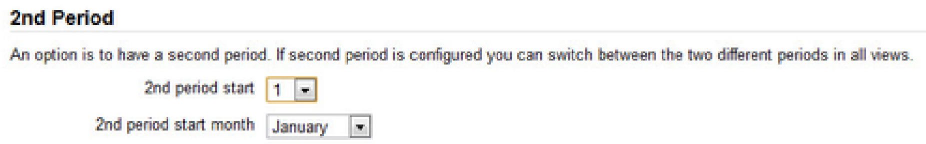
2nd period

The default selection for period is **1. January** and if the selection is the same as for **Period** the **2nd Period** is not activated

To activate the **2nd Period** do the following:

1. Select the **2nd period start** date that is different from the **Period** start date.
   The end date is equal to (Start date – 1).
2. Select the **2nd period start month**: December or January.

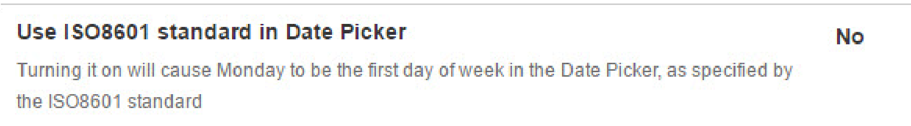
The reason for the **2nd period** option is that some users choose to have pay period different than a period used for billing customers.



If both periods are used, **Tempo Users** can select what period is rendered on **Timesheets, Reports** and **Worklog** pages in Tempo.

Week Start Day

The first day of week in the date picker and Timesheets week display is either Sunday or Monday according to your settings in JIRA Look and Feel - - > Date/Time formats.



Period management

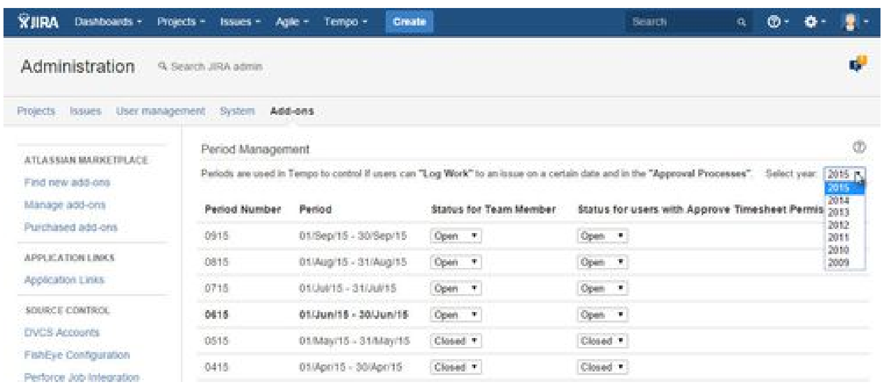
In this chapter

Period Management in Tempo is used to control when users can **Log Work** on issues, e.g. is the period still open.

To **Open** or **Close** a period, you will need to access the **Period Management**:

1. Log in as JIRA or Tempo Administrator.
2. Select **Administration** from the **Tempo drop-down menu** in the top navigation bar, choose **Period Management**.

The Period Management page in Tempo Administration (click to enlarge)



The current period is displayed in **bold** text and periods in the past are **Closed** by default. You can change the **Status** for each **Tempo Role** according to your needs.

<u>*Closed* for Tempo Team members:</u>

Users as **team members** can *not add or edit work-logs* within the specific period. Users with the Approve Timesheet permission can edit, split, and move work-logs in this ***Closed – Open*** state if they have the corresponding project permissions. If the *Timesheet Approval Process* is enabled, users with the Approve Timesheet permission can **Approve** or **Reject** timesheets for team members.

<u>*Closed* for Tempo users with Approve Timesheet permisson:</u>

The period is usually closed for users with the Approve Timesheet permission, a *few days later* than for **team members**. This allows the users with the Approve Timesheet permission to **review** their team members' timesheets. When all timesheets have been approved, the period is closed. The **Timesheets Status** is changed to **Closed** and work-logs cannot be changed in the ***Closed – Closed*** state.

⚠ The period management does not affect the 2nd period if one has been selected in the Period

Configuration.

*Click the **Help** icon on the top right of the page to open the online documentation:*

Configuring Tempo scheduler

The **Tempo Scheduler** can both be used to schedule closure and reminders to add and edit worklogs within an Open Period.

To access the Tempo Scheduler do the following:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo Timesheets** administration left tabs and choose the **Scheduler** option.
   Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Scheduler**.

On this page

- Scheduled closing dates
- Scheduled reminders

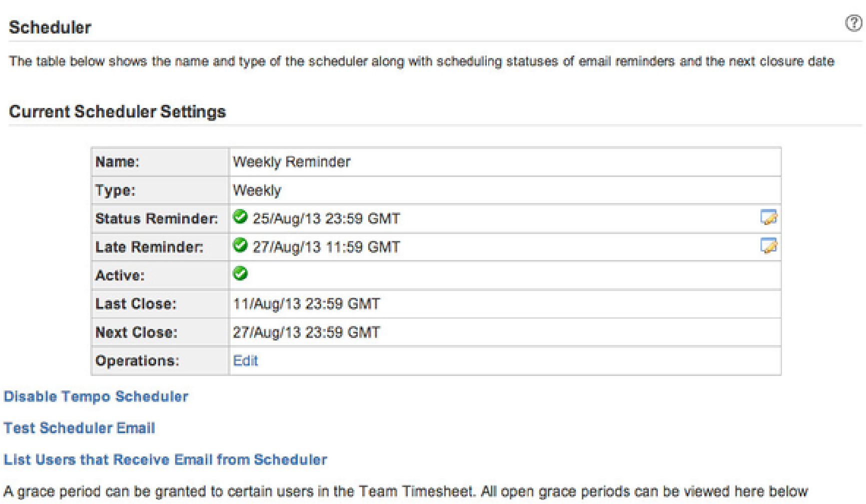
In this chapter

Video

Scheduled closing dates

The scheduler can be used to schedule intermediate closing dates within an Open Period. After a scheduled closing date, users who do not have Approve Timesheet permission for their team are blocked from adding and editing worklogs for dates that are before the closing date. To add or edit such worklogs, users must ask a user with Approve Timesheet permission for their team to grant a short Grace Period, during which the worklogs are accessible. An overview of a scheduler configured with weekly closing dates is shown in the image below.

Example of a scheduler configured with weekly closing dates (click to enlarge)



The green ticked icon shows active items, but inactive items would be shown with a red minus icon.

In the **Operations** line, click the **Edit** link to adjust settings for the Scheduler. The edit mode for the Scheduler is opened and looks like in the screenshot below. The items from both screenshots are explained in the table below.

The Edit Scheduler screen (click to enlarge)

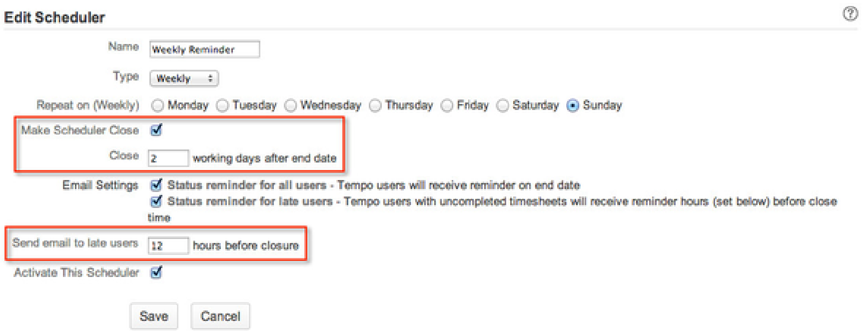
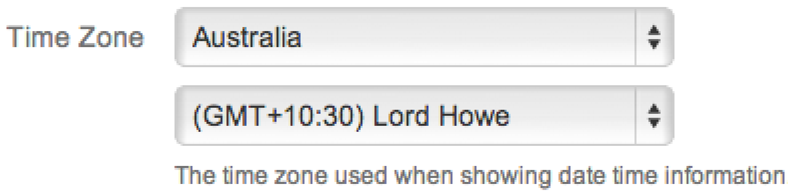


Table: Items from the screenshots above explained

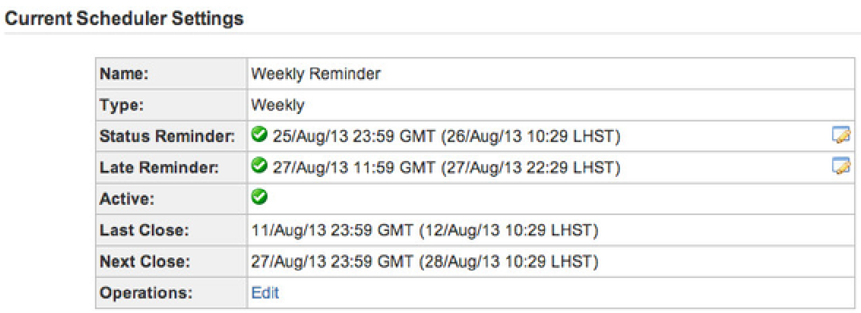
Scheduler Item	Description
Name	The name of the scheduled closure configuration.
Type	Three types can be chosen from a drop-down, e.g. **Weekly**, **Biweekly** or **Period**.
Status Reminder	In the edit mode you choose which day of the week to repeat the scheduled closure on. The Status Reminder will show the next scheduled **end date**, given the type and repeat date chosen. This becomes the date when an email is sent about **Status reminder for all** users. The reminder emails can be **edited** by clicking the icon at the end of the line, that opens the Configuring the email template in Tempo scheduler screen.
Late Reminder	The Late Reminder is calculated from two items in the edit mode, **Close [ ] working days after end date** and **Send email to late users [ ] hours before closure**. The box for sending **Status reminder for later users** needs to be ticked to activate the Late Reminder. If the closing should happen **2** days after end date, but the email is sent **12** hours before closure, the Later Reminder happens **1.5** days after the end date (as in the screenshots above). If the closing and end dates are the same (**0** working days after end date) and the email will be sent 12 hours before closure, e.g. it will be sent 12 hours before the closing/end date.
Active	If a green ticked icon is shown in the Scheduler Settings overview, the **Activate This Scheduler** box has been ticked in the edit mode.
Last Close	Gives the **last** closing date, based on the number given in **Close [ ] working days after end date** and the **Type** chosen.
Next Close	Gives the **next** closing date, based on the number given in **Close [ ] working days after end date** and the **Type** chosen.
Operations	**Edit** link to open the edit mode.

A different Time Zone setting for the current user in her/his JIRA User Profile, will be displayed additionally in the Scheduler Settings.

A different Time Zone in the JIRA User Profile



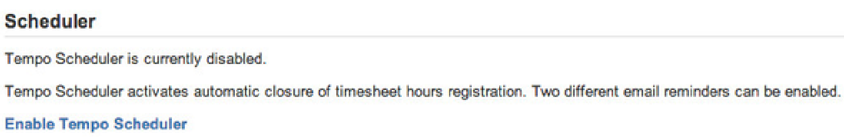
Current Scheduler Settings, displaying also the different Time Zone in the brackets


Current Scheduler Settings

Name:	Weekly Reminder
Type:	Weekly
Status Reminder:	25/Aug/13 23:59 GMT (26/Aug/13 10:29 LHST)
Late Reminder:	27/Aug/13 11:59 GMT (27/Aug/13 22:29 LHST)
Active:	
Last Close:	11/Aug/13 23:59 GMT (12/Aug/13 10:29 LHST)
Next Close:	27/Aug/13 23:59 GMT (28/Aug/13 10:29 LHST)
Operations:	Edit

In the first screenshot above, three links are shown:

1. **Disable Tempo Scheduler** - displays the following screen:


Scheduler

Tempo Scheduler is currently disabled.

Tempo Scheduler activates automatic closure of timesheet hours registration. Two different email reminders can be enabled.

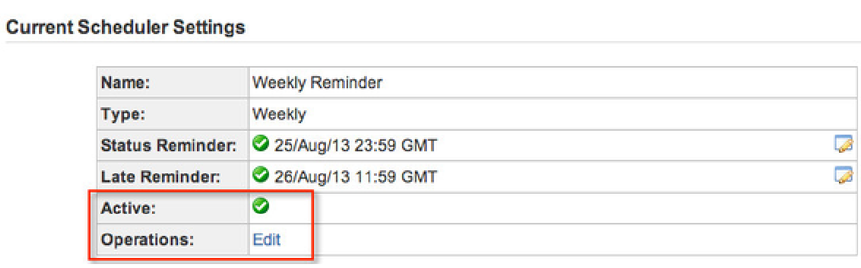
Enable Tempo Scheduler

2. Sending test email from Tempo scheduler
3. **List Users that Receive Email from Scheduler** - displays a list of users receiving emails from the scheduler. The users listed must have 'Work on Issues' permission for at least one project, and in order to receive email, they need to either have logged some time or be in a workload scheme with required workload.

Scheduled reminders

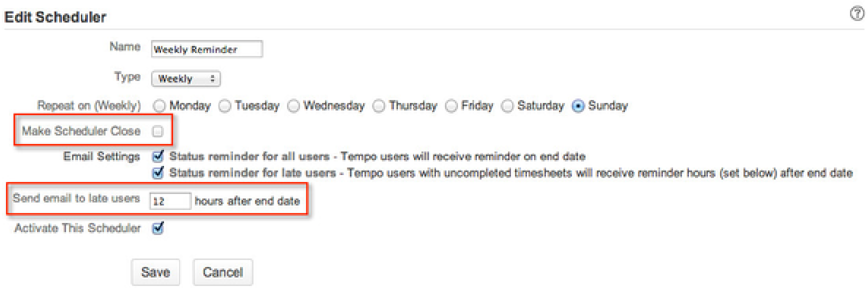
Scheduled Reminders differ from Scheduled Closures, in that they are just reminders and there is no closing date. This means that when editing the Scheduler, the box **Make Scheduler Close** stay s unchecked - see screenshots below.

Current Scheduler Settings for Scheduled Reminders - Last and Next Close are not listed


Current Scheduler Settings

Name:	Weekly Reminder
Type:	Weekly
Status Reminder:	25/Aug/13 23:59 GMT
Late Reminder:	26/Aug/13 11:59 GMT
Active:	
Operations:	Edit

Edit Scheduler page with Make Scheduler Close is unchecked (click to enlarge)



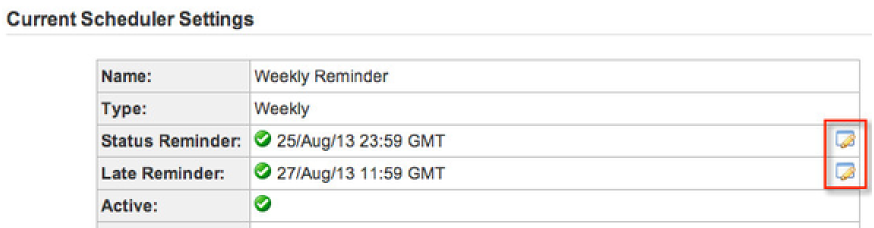
Note that **Send email to late users [ ]**, changes from **hours before closure** to **hours after end date**.

Configuring the email template in Tempo scheduler

In this chapter

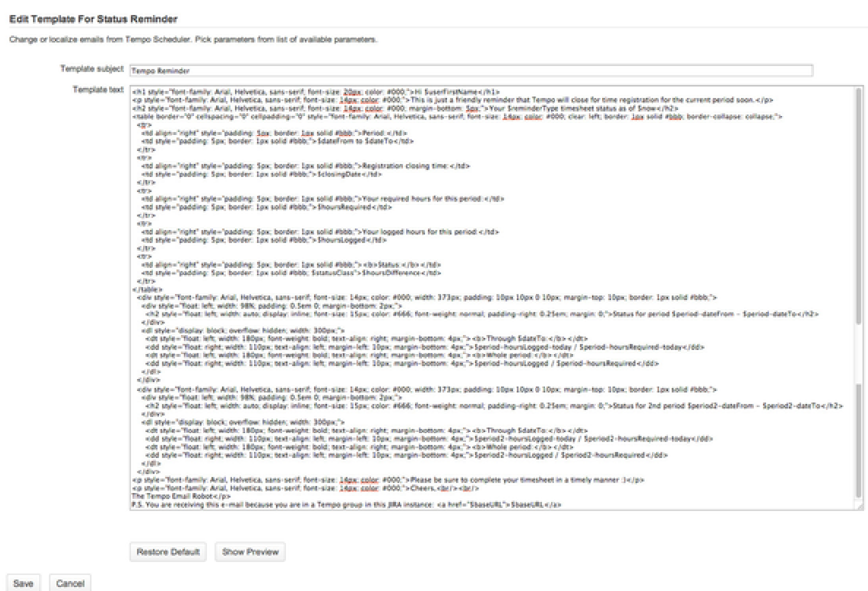
This is a child page of Configuring Tempo scheduler, explaining the Reminder email templates. They can be edited according to your needs and an edit icon is displayed for active Reminders to the end of each line.

The edit icons for active Reminders - Status and Late Reminder



The snapshots below focus on **Status Reminder**, but the **Late Reminder** functions similar. To edit a Reminder, start by clicking the edit icon as in the screenshot above - this opens the **Edit Template For Status Reminder** page.

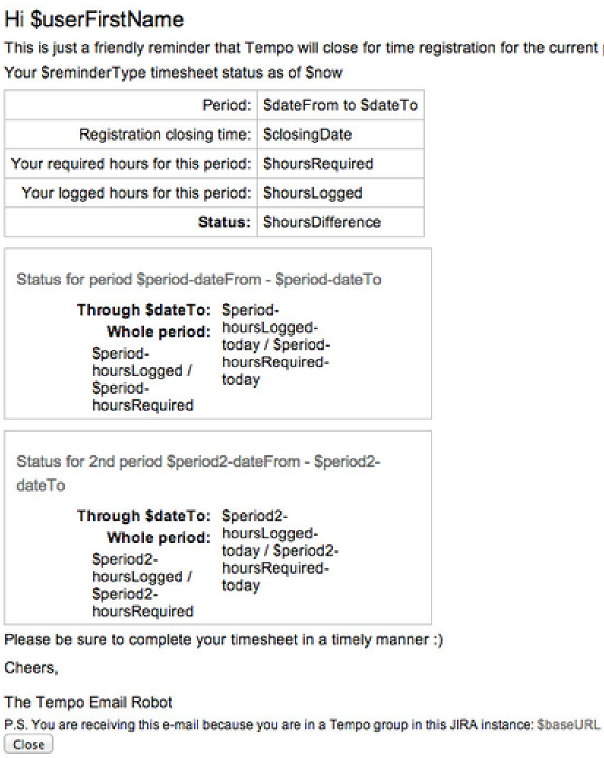
The Edit Template For Status Reminder page (click to enlarge)



Note that in order to show the whole **Template text**, the lower part has been fused into the screenshot - the strange scrollbars short of show this.

To the right of the Template text window is a list of **Available parameters**, to use in changing the HTML. Use the **Show Preview** button at the bottom to view the changes you have done. Once done click the **Save** button or the **Cancel** button to close without saving.

An example of the Template text above shown by clicking the Show Preview button



Hi $userFirstName

This is just a friendly reminder that Tempo will close for time registration for the current period soon.

Your $reminderType timesheet status as of $now

Period:	$dateFrom to $dateTo
Registration closing time:	$closingDate
Your required hours for this period:	$hoursRequired
Your logged hours for this period:	$hoursLogged
Status:	$hoursDifference

Status for period $period-dateFrom - $period-dateTo

Through $dateTo:	$period-hoursLogged-today / $period-hoursRequired-today
Whole period: $period-hoursLogged / $period-hoursRequired	

Status for 2nd period $period2-dateFrom - $period2-dateTo

Through $dateTo:	$period2-hoursLogged-today / $period2-hoursRequired-today
Whole period: $period2-hoursLogged / $period2-hoursRequired	

Please be sure to complete your timesheet in a timely manner :)

Cheers,

The Tempo Email Robot

P.S. You are receiving this e-mail because you are in a Tempo group in this JIRA instance: $baseURL

Close

Below are a few tables listing the Available parameters and what they all mean.

All changes can be tested by sending a Sending test email from Tempo scheduler from the scheduler.

Table: General Available parameters

Parameter Name	Description
userFirstName	User first name used in the greeting
userFullName	User full name used in the greeting
reminderType	The types can be Period, Weekly or Biweekly
dateFrom	Start date of the period being closed
dateTo	End date of the period being closed
closingDate	Closing date/time of the period being closed, e.g. when the close scheduler runs
hoursRequired	Users required hours for the period being closed
hoursLogged	Users logged hours for the period being closed
hoursDifference	The difference between required and logged hours for the period being closed
now	Date and time of the user timesheet status, e.g. when the status is sent
baseURL	The JIRA URL used in the P.S. section info
statusClass	Used to highlight hour difference with red if hours are missing

The following parameters are only available in for the Weekly or Biweekly status emails. These parameters add information about the status of current Tempo period.

Table: Available parameters for the Period

Parameter Name	Description
period-dateFrom	Start date of the period
period-dateTo	End date of the period
period-hoursRequired	Users required hours for the period
period-hoursLogged	Users logged hours for the period
period-hoursRequired-today	Users required hours for the period from period start through scheduler close date
period-hoursLogged-today	Users logged hours for the period from period start through scheduler close date
period-hoursDifference	Difference between required and logged hours in the period
period-statusClass	Used to highlight hour difference with red if hours are missing

The following parameters are only available in for the Weekly or Biweekly status emails when the 2nd period is enabled in Tempo. These parameters add information about the status of current Tempo 2nd period.

Table: Available parameters for the 2nd Period

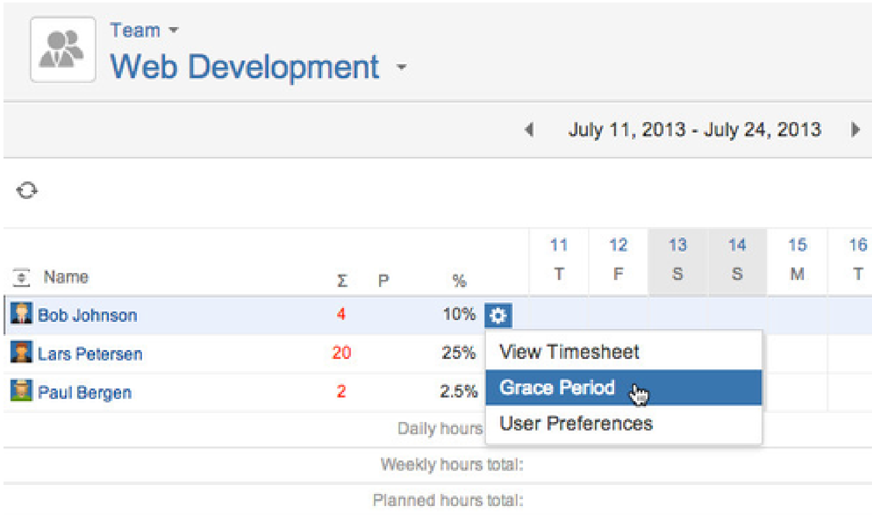
Parameter Name	Description
period2-dateFrom	Start date of the period
period2-dateTo	End date of the period
period2-hoursRequired	Users required hours for the period
period2-hoursLogged	Users logged hours for the period
period2-hoursRequired-today	Users required hours for the period from period start through scheduler close date
period2-hoursLogged-today	Users logged hours for the period from period start through scheduler close date
period2-hoursDifference	Difference between required and logged hours in the period
period2-statusClass	Used to highlight hour difference with red if hours are missing.

Granting a grace period

This is a child page of Configuring Tempo scheduler, explaining what a **Grace Period** is. When the Scheduler is used to schedule a **closure**, users are blocked to add and edit worklogs within an Open Period after the closing date. In order to be able to add and edit to those worklogs after the closing date, they will have to ask the user with the Approve Timesheet permission to grant them a short **Grace Period** to reopen the access. Users with the Approve Timesheet permission can grant users a **Grace Period** of any length from the **Actions** list in the Team Timesheet and Project Timesheet.

In this chapter

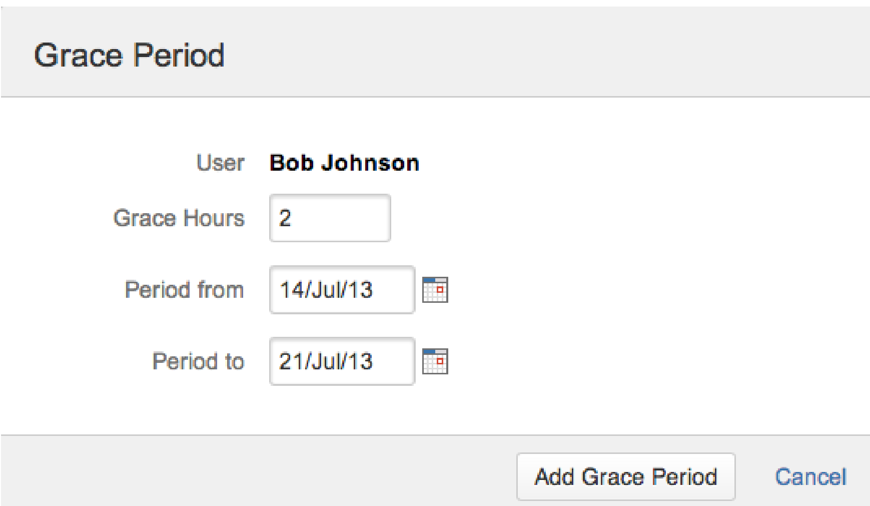
Granting a Grace Period in the Team Timesheet for Bob Johnson



This opens the Grace Period window, where you fill in the following:

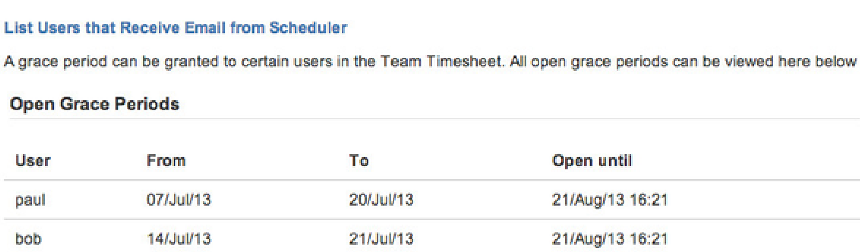
1. **Grace Hours** - The number of hours the user has to complete the timesheet.
2. Select **Period from** and **Period to** dates for the Grace Period that needs to be opened.
3. Click the **Add Grace Period** button if you are done or the **Cancel** link to close without saving.

The Grace Period window



Open Grace Periods are listed at the bottom of the Scheduler page, in the Tempo Timesheets Administration - see screenshot on the parent page and below.

A list of Open Grace Periods in the Scheduler (click to enlarge)



List Users that Receive Email from Scheduler

A grace period can be granted to certain users in the Team Timesheet. All open grace periods can be viewed here below

Open Grace Periods

User	From	To	Open until
paul	07/Jul/13	20/Jul/13	21/Aug/13 16:21
bob	14/Jul/13	21/Jul/13	21/Aug/13 16:21

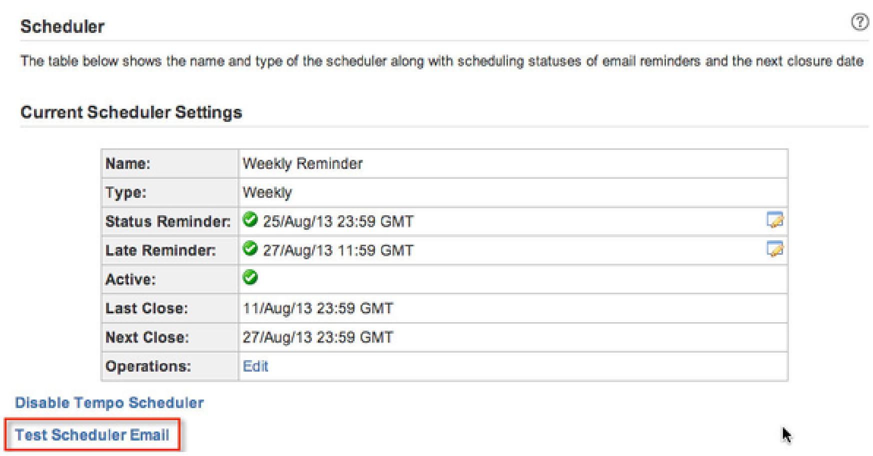
The list shows that Bob Johnson has an open grace period until July 30th 2013 at 17:52 and can add or edit worklogs from July 14th to 21st.

Sending test email from Tempo scheduler

This is a child page of the Configuring Tempo scheduler, explaining the **Test Scheduler Email** feature. The JIRA Administrator can send an email for testing from the Scheduler, by clicking the Test Scheduler Email link on the Scheduler screen.

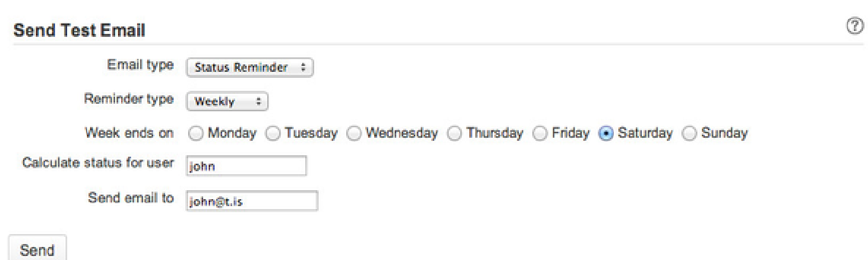
In this chapter

The Test Scheduler Email link on the Scheduler screen (click to enlarge)



The **Send Test Email** screen is opened, as in the screenshot below.

The Send Test Email screen



To send an email do the following:

1. Select an **Email type**, either **Status Reminder** or **Late Reminder**.
2. Then select a **Reminder type**, one of three - **Period**, **Weekly** or **Biweekly**.
3. Choose the day the **Week ends on**.
4. Select a user in the user picker field - **Calculate status for user**. If the field is left empty the current user will be used, which is also the default value.
   The test email message will include the calculated period status for the selected user.
5. Write the email address you want to use for the test in the **Send email to** field.
   The default email address is for the current user.
6. Click the **Send** button to finish and you check the users inbox for an email.

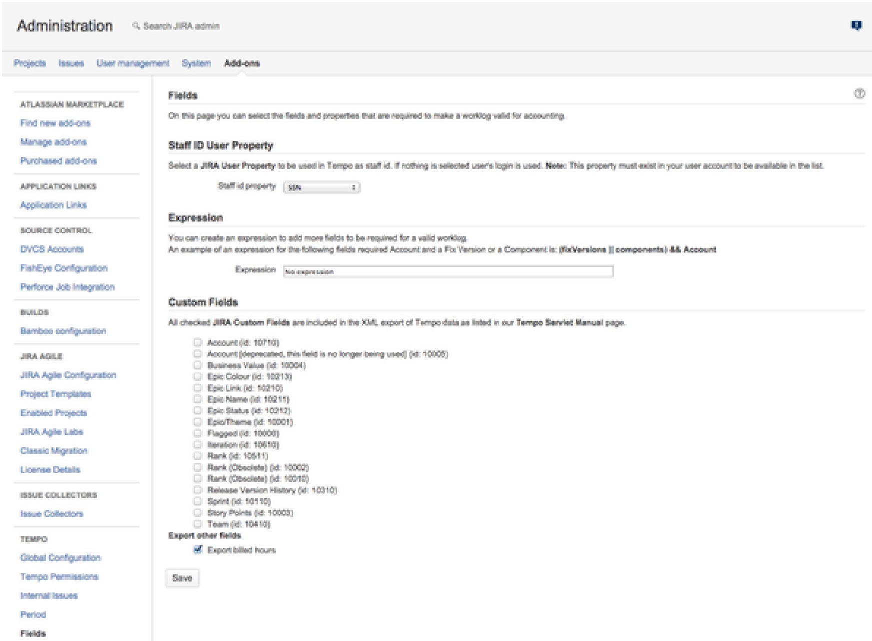
Configuring fields and properties

The **Fields** screen in the Tempo administrative section gives options to configure certain fields and properties to make a worklog valid for Account Reports. This is also the screen to select JIRA custom fields to include in a Tempo XML export. Take the following steps to open the Fields screen:

In this chapter

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Fields** option.
   Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Fields**.

The Fields screen in the Tempo administrative section (click to enlarge)

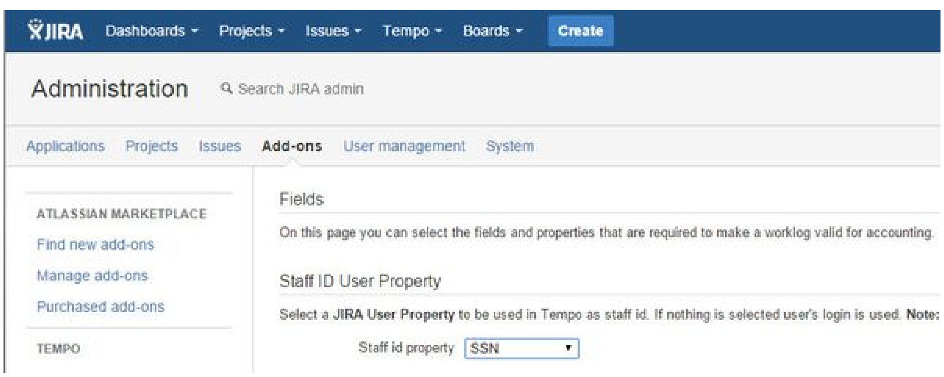


Configuring staff ID property

In this chapter

Staff ID user property

If Tempo Accounts is being used and connected to an external accounting system, a unique Staff ID is often required. A User Property can be created for this purpose and set here.



The user property to be used for all users, needs to be set on the JIRA Administrator performing this action, in order to be displayed in the list.

Worklogs created by users that don't have the set property, are shown as Invalid worklogs in timesheets.

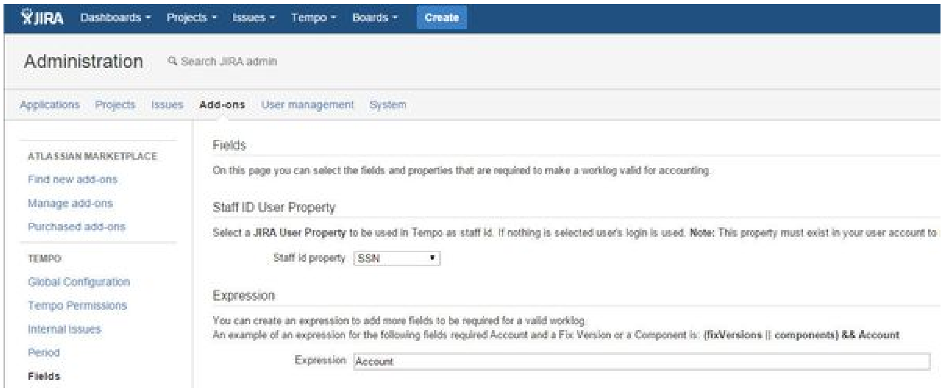
All user properties are included in the XML export as documented in the Tempo servlet manual. If no Staff ID User Property is selected the user's login name is used in the XML export.

Configuring expression for valid worklogs validation

In this chapter

Tempo Expression

Setting an Expression enforces validation of the work attributes used in it. An example for the required field **Account** along with a **Fix Version** or a **Component** would be: *"(fixVersions || components) && Account".*



JIRA Issues that are not valid according to the expression, are shown with red Invalid worklogs label in timesheets.

This means that the expression is used exclusively for validation and the Tempo Accounts custom field is ignored if it is not in the expression. All JIRA Projects that do not have Accounts Linked, are not included in the validation for Invalid worklogs.

For best results when using custom fields in the expression, copy and paste the field name to avoid problems resulting from case sensitivity.

Including custom fields in API export

In this chapter

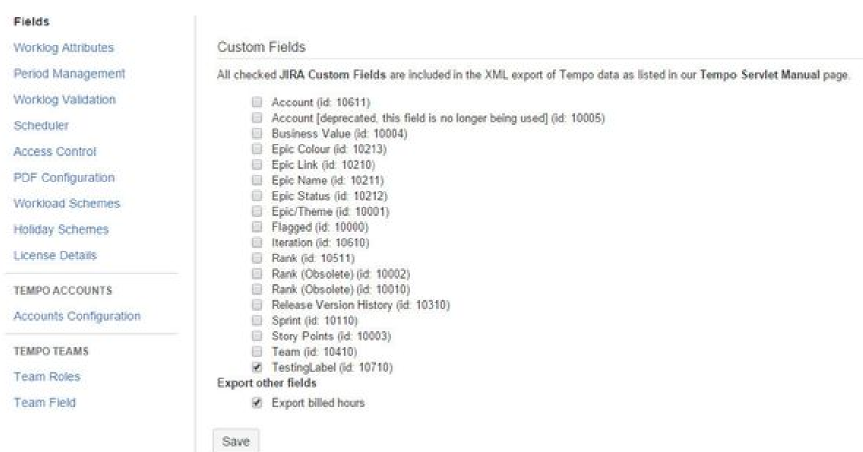
Custom Fields in Tempo export

Check the fields in this section to be included in the XML, which can be generated with Tempo servlet manual. Several JIRA custom fields types have been tested for exports:

- Free Text Fields
- Select List
- Cascading Select
- Multi Checkboxes
- Radio Buttons
- Number Field

Other fields to export as shown in the screenshot are **Export billed hours**.

Custom fields section on Fields page - click to enlarge



The **Export billed hours** option is selected by default. However, for billed hours to be exported, the first or both of the following options in Global Configuration must also be checked:

- User with Approve Timesheet Permission can set billed hours
- Other users can set billed hours

Configuring and managing teams

Extract from **Tempo Teams** (plug-in) version: 3.x.x

This page and its child pages explain what a user with Tempo Team Administrators permission can do, consisting of managing programs and teams, along with configuring each team.

In this chapter

Related pages

- Granting permission to users
- Team Roles

Manage teams overview

- A user needs to be configured through JIRA Global Permissions section, to get the Tempo Team Administrators permission.
- This permission gives access to manage/browse all teams, e.g. to create and configure teams, along with managing team programs.
- Having this permission, does not automatically include Approve Timesheets and Plan Time permissions - this user can though give her/himself these permissions.
- When creating or configuring a team, a **Team Lead** can be added, which is not really a permission, but rather a role that automatically gains permissions for each team.

Adding a Team field to JIRA screens

Extract from **Tempo Teams** (plug-in) version: 3.x.x

The Tempo Team Custom Field is installed automatically with Tempo Teams, but needs to be associated to screens. The custom field makes it possible to give JIRA Issues to a Tempo team, and the team can then be used in the JIRA Issue search, like when creating filters for JIRA Agile boards.

In this chapter

Giving Epics to a team will also give all the associated JIRA Issues to the team. Same goes for sub-tasks of an Issue that is given to a team.

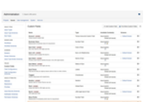
In Tempo Planner, this custom field is also used behind the scenes in Program Planning, when giving backlog items to teams.

Required permission

JIRA Administrators permission

Procedure

1. The Custom Field is Automatically Installed



- Log in as a user with the **JIRA Administrators** Global Permission.
- Choose the **cog icon** at top right of the screen, then choose **Issues**, and select **Fields > Custom Fields** (left tabs).
  Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Custom Fields**.
- Scroll down to the **Team** Custom Field, which by default it is not associated to any screens.
- The field is automatically installed with Tempo Teams and locked.
  In case the field needs to be renamed it can be done in Tempo's administrative section.
- It is available globally for all issue types.

2. Associating to Screens

- To associate the field to screens, click on the cog-wheel menu to the right and select the **Screens** option.

- The *Associate field Team to screens* page is displayed.
- Select how you want to associate the field to screen(s) (Default Screen, Resolve Issue Screen or Workflow Screen) and click the **Update** button.

Tutorial

Adding the Team field to JIRA screens

The following Tempo Planner video tutorial is valid also for other Tempo products.

3. Giving an issue to a team

- Edit an Issue, and give it to a team.
  Note, the team list displayed in the drop-down, is associated with having the Browse Team permission for each team.
- When creating an issue, the teams linked with the project, are suggested at the top of teams in the drop-down list.
- In Tempo Planner, the custom field is also used behind the scenes in Program Planning, when giving backlog items to teams.
  Note, this doesn't require any configuration of the field out of the box.

Changing the name of the Team field

Extract from **Tempo Teams** (plug-in) version: 3.x.x

If the default name for the Teams Custom Field needs to be changed, due to having a previous custom field with the same name, it can be done in the administrative section of Tempo. This page explains how to edit the field name:

In this chapter

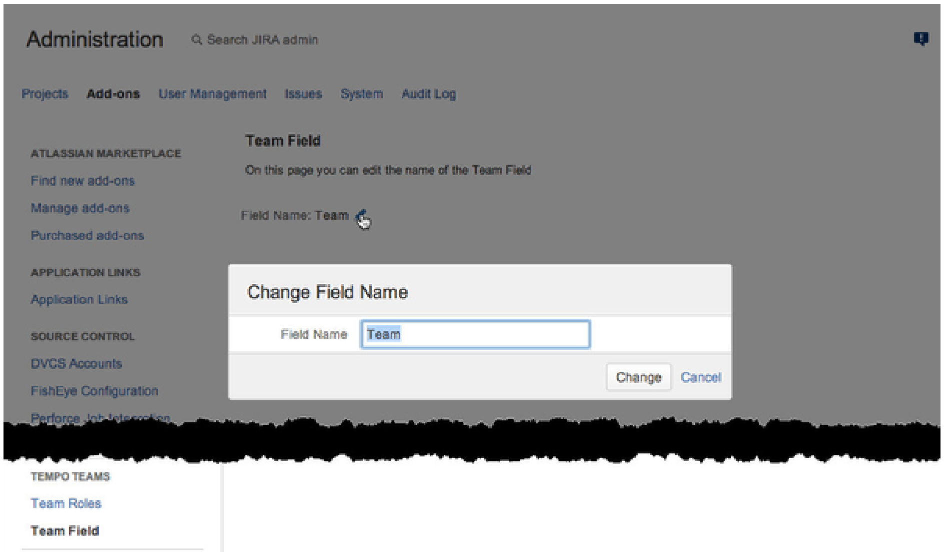
Required permission

JIRA Administrators permission

Procedure

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo Teams** administration left tabs and choose the **Team Field** option.
   Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Team Field**.
3. This opens the **Team Field** screen, where you click on the *pencil icon* next to the *Field Name* to open the **Change Field Name** dialog - see screenshot below.
4. Edit the name and click the **Change** button to finish or the **Cancel** link to opt out.

The Team Field administrative screen (click to enlarge)



Naming team roles

Extract from **Tempo Teams** (plug-in) version: 3.x.x

Tutorial

How to create teams and to name team roles

When adding/editing a new team member, a new role may sometimes be needed. This page explains how to add/edit a role:

On this page

In this chapter

Required permission

JIRA Administrators permission

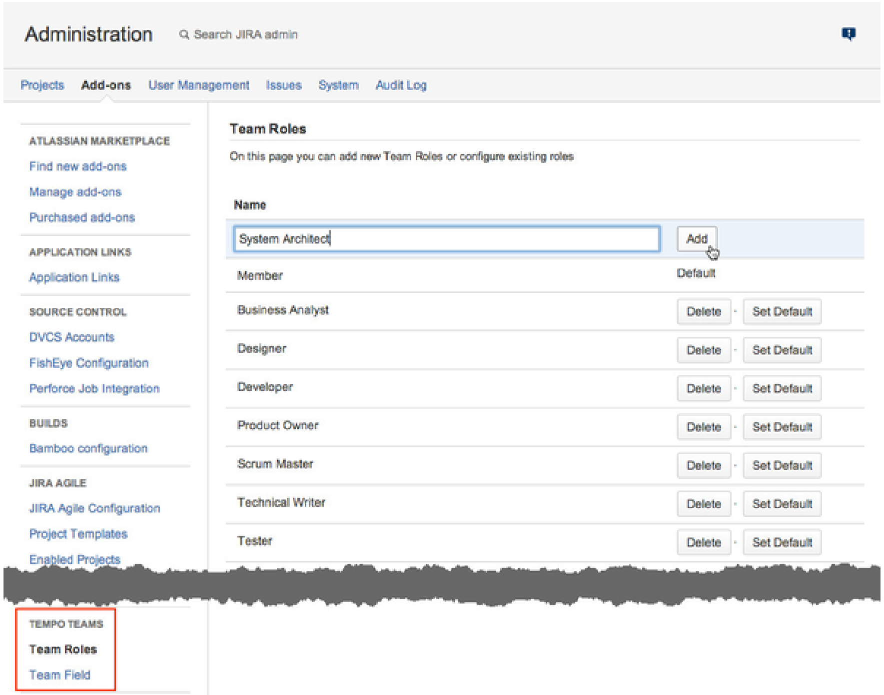
Add Team Role

Procedure

To add a new Team Role do the following:

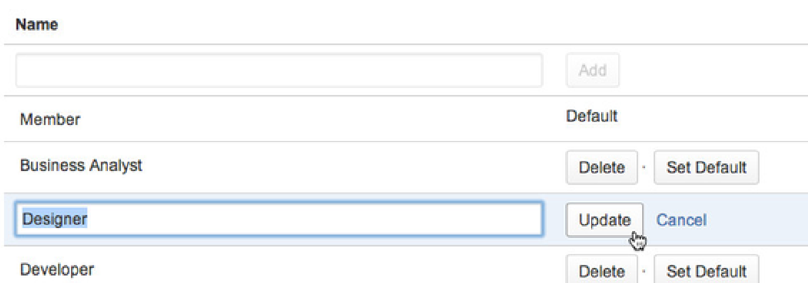
1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo Teams** administration left tabs and choose the **Team Roles** option.
   Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Team Roles**.
3. Type a **Name** for the new role into the field as shown in the screenshot below and click the **Add** button next to it.

The Team Roles administrative screen (click to enlarge)



Edit Team Role

- Click in the Name field to **Update** an existing role.



- Click the **Delete** button next to role you want to delete and a confirmation window is displayed.
- Click the **Set Default** button at the end of it's line to set a default role and a confirmation window is displayed.

Related topic

Changing the roles of team members

Tempo team navigator

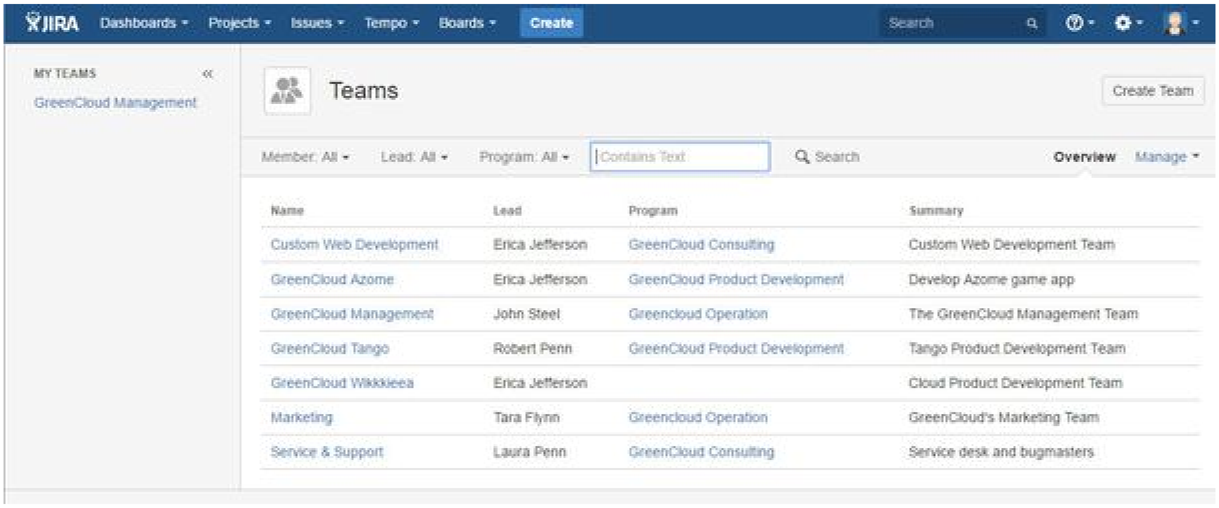
Extract from **Tempo Teams** (plug-in) version: 3.x.x

In the teams navigator, you can search and filter all Tempo Teams that you have permission to view.

Accessing the teams navigator

Click **Tempo** > TEAMS **more**.

The teams navigator (click to enlarge)



Filtering the list of teams

Above the list of teams, the filter menu bar contains filter attributes, such as **Member**, **Lead**, and (for Tempo Planner) **Program**.

Filtering by searching

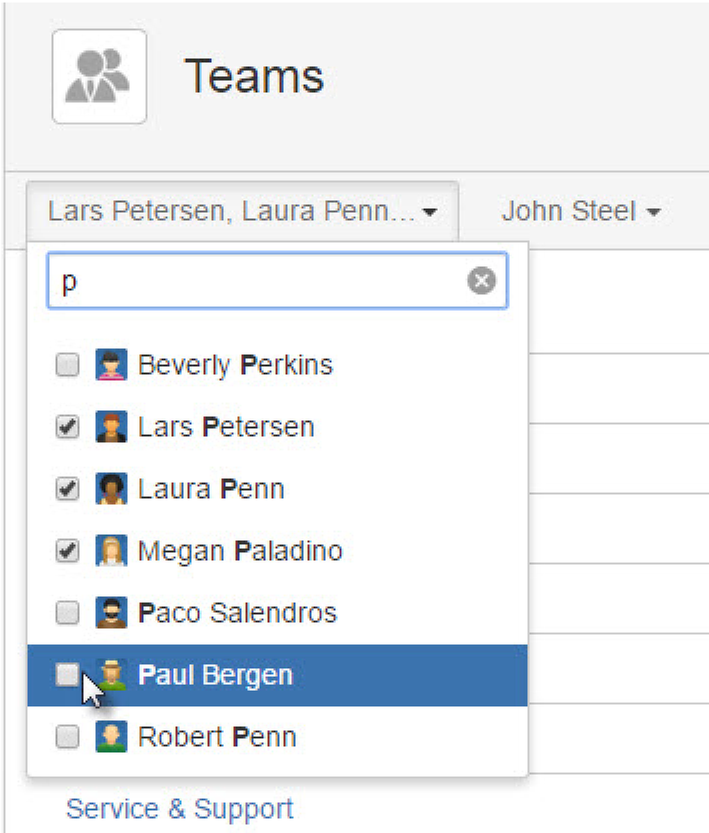
On the filter menu bar, in the search field, type text that you want to search for, and press Enter. Teams that contain the text in one or more of the fields of the team are listed.

Filtering by selecting attribute values

Complete the following steps:

1. On the filter menu bar, click a filter attribute.
2. From the list that is displayed, select one or more values of the attribute.
3. On the filter menu bar, click **Search**.

Filter example - by Member



Related topic

Creating teams

Browsing a team

Extract from **Tempo Teams** (plug-in) version: 3.x.x

Required permission

Browse Team permission for the team

Procedure

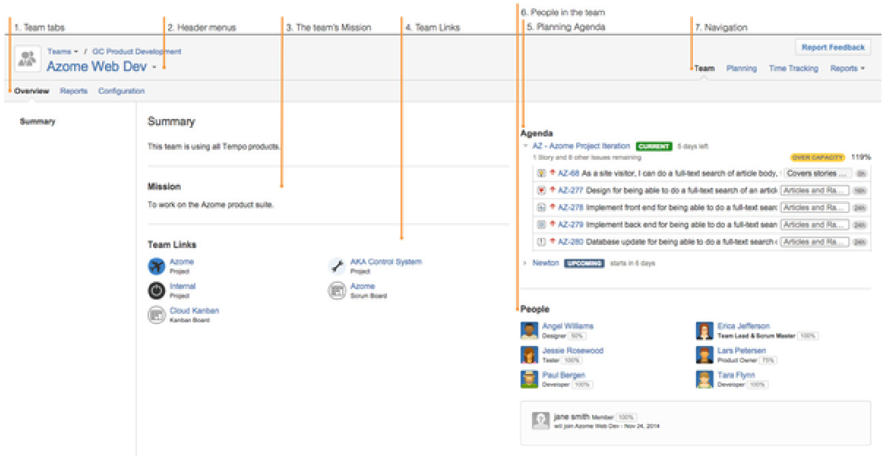
To open the overview page for a team, click on the team link in the Tempo teams navigator.

The overview page for the Azome Web Dev team (click to enlarge)

On this page

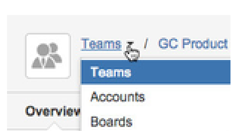
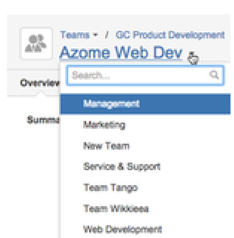
Related pages

- Granting permission to users
- Team Reports

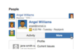


The numbers on the screenshot, are explained in the table below.

Table: Explaining the numbered items from the screenshot above

Item Number	Description
1.	Overview, Reports and Configuration tabs for the team. The Configuration tab is displayed in all teams for users with Tempo Team Administrators permission. The tab is displayed for **Team Leads** in their own teams.
2.	There are two header menus. The first menu has three options; To go back to the Teams Browser, to open the Accounts Browser and to open JIRA Agile Boards browser (given JIRA Agile is installed). **Note** that JIRA Agile needs to be set-up for the Boards option to be available. The second menu shows all the teams that the current user has access to and by selecting a new team the page below the header displays the new team. *Select a browser*  *Select a new team*  **Note** the *GC Product Devlopment* link next to those menus, which opens the program the team belongs to.

3.	The Overview page displays a few items for the team. The first item is the **Mission** for the team, which is defined afterwards on the Confi gure screen in the Configuration.
4.	This item gives an overview of the **Team Links** (Projects or Scrum Boards) linked to the team. The linking is done on the Links page. By clicking on either a Project or the linked Scrum Board, the respective JIRA Project and JIRA Agile Scrum Board pages are displayed.
5.	The **Agenda** section is only shown if Tempo Planner is installed and if it has active/upcoming iterations or sprints planned on the team. Some statistics are also shown for these Agenda items.

6.	The **People** section displays all the members of the team, e.g. their name, Roles and Availability. The names are sorted alphabetically from left to right and then down the page. The lead of the team is displayed, either just as **Team Lead** or **Team Lead & other role + xx%**, with her/his title shown in bold letters. *Member pop-up*  • By **hovering** over the name of a member, her/his pop-up profile is displayed, as in the left screenshot. • Clicking on the **Activity** link in the member pop-up, opens the activity stream in the user's Profile. • More -> **Profile**, opens the user's Profile. • More -> **Current Issues**, opens the JIRA Issue Search with the user's current issues. • More -> **Administer User**, opens the JIRA User Management - Users - the selected user. (This is only available for users that are JIRA Administrators). **Future members** are shown in a box below the current members, and are either existing JIRA users (or current employees) or new hires (jane smith *will join Azome Web Dev - Nov 24, 2014*). When a JIRA user has been created for the new hire, the names can be mapped together. The Tempo Team Timesheet does only show active memberships at any given date range. This means for example that user Bob Johnson, who is joining Team Tango during April, will only be displayed in the Team Timesheet during that month.
7.	• The **Team** tab/button refreshes the current page. • If Tempo Planner is installed a **Planning** tab/button is displayed. Click on the button to open the Planner Timeline. • If Tempo Timesheets is installed, a **Time Tracking** tab/button is displayed to open the Team Timesheet for the team. • The **Reports** drop-down has the same options, as detailed on the Team Reports page.

Creating teams

Extract from **Tempo Teams** (plug-in) versio
n: 3.x.x

Tutorial

How to create teams and team roles

A team might consist of, for example, the people in one department of your company, or it might be a scrum team if you work in an agile software development environment.

Required permission

JIRA Administrators or **Tempo Team Administrators**

Procedure

To create a team, complete the following steps:

1. On the main menu bar, click **Tempo** > TEAMS **more**.
2. On the Teams page, in the upper-right corner, click **Create New Team**.
3. In the Create Team window, fill in the information, and click **Create Team**.

The new team is automatically added to the list on the Teams page.

What to do next

Configure basic team information.

Configuring basic team information

Extract from **Tempo Teams** (plug-in) versio
n: 3.x.x

You can edit the following basic information about a team: team name, summary description, team lead, the program (or group of teams) to which the team belongs in Tempo Planner, and the team's mission.

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Tutorial

The following Tempo Planner video tutorial is valid also for other Tempo products.

Procedure

To configure basic team information, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).

2. In the **Configure Team** area, you can edit the team name, summary description, team lead, associated program, and mission.

> **Tips**
> - Only users with **Tempo Team Administrators** or **JIRA Administrators** permission can change the team lead.
> - For Tempo Planner only: For information about programs, see the related topic below.

3. Click **Update**.

What to do next

Configure team membership

Related topic

For Tempo Planner: Grouping teams together, as a program

Configuring team membership

Extract from **Tempo Teams** (plug-in) version: 3.x.x

You can configure team membership by, for example, adding or removing members, planning for new members to join at a later date, giving a team member different roles for different time periods, or changing the amount of time that a team member dedicates to the team.

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Procedures

Adding team members

Extract from **Tempo Teams** (plug-in) version: 3.x.x

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Tutorial

The following Tempo Planner video tutorial is valid also for other Tempo products.

Procedure

To add members to a team, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the left column, click **Members**.
3. On the **Team Members** page, do one or both of the following tasks:
   - Add individual team members by filling in the fields in the top row of the **Users** table and clicking **Add**.

     Users

     The name of the team member. If the team member is a JIRA user, start typing the user's name and select the name from the list. If the team member is not yet a JIRA user, type the user's name.

     Status

     Status is assigned automatically and depends on the joining and leaving dates (see below).

     Active: Current team member
     Inactive: Past or deactivated team member
     Upcoming: Future team member

     Roles

     You can click the field and select a role (for example, designer, developer, or marketing) from the list. The default role is 'Member,' unless a JIRA Administrator changed the default. Only users with **JIRA Administrators** permission can add new roles to the list. (For information about adding roles, see Team roles.)

     Availability

     The percentage of the team member's work time that will be dedicated to this team. For example, a team member that works on two teams might have availability of 50% for this team. The default is 100%.

     Joining

     If the team member plans to join the team at a later date, choose the date on the **Joining** calendar.

     Leaving

     If the team member plans to leave the team on a known date, choose the date on the **Leaving** calendar.

     > **Tip**
     > You can add a member to the team more than once but for different dates. For example a team member can have one role one month and a different role the following month. The team member is listed only once in the list of all team members. You can view information about the team member for other dates by clicking **Edit** on the team member's row.

   - Add multiple team members simultaneously by selecting a JIRA group in the top row of the **Groups** table and clicking **Add**.

     > **Tip**
     > With this method, you cannot set roles, availability, joining dates, or leaving dates for individual team members. You can only add or remove the group as a whole.

What to do next

See where team members are displayed by clicking **Overview**. In the **People** section, the active team members are first displayed, with their roles and availability for the team. Upcoming team members are displayed in an information box, with the date on which they plan to join.

Related topic

Team roles

Changing the roles of team members

Extract from **Tempo Teams** (plug-in) version: 3.x.x

Team roles (for example, designer, developer, or marketing) were set when users were individually added to the team. You can change the roles of these team members. You cannot set roles for members that were added to the team as part of a JIRA group.

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Procedure

To change the role of a team member, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the left column, click **Members**.
3. On the Team Members page, in the row of the team member whose role you want to change, click **Edit**.
4. On the individual team member's page, do *not* click the top **Roles** field. Instead, in a row beneath that field, double click the role that you want to change, and select a new role from the list.
5. Click **Update**.

Tip
Only users with **JIRA Administrators** permission can add new roles to the list of roles. For information about adding roles, see the related topic below.

What to do next

You can return to the list of all team members by clicking **Members** in the left column.

Related topic

Team roles

Changing the availability of team members

Extract from **Tempo Teams** (plug-in) version: 3.x.x

A team member might be available to work for the team for 100% of the working hours. Another team member might be available to work 60% for one team and 40% for another team. The availability percentage of a team member to work on a team was initially set when the team member was added to the team. You can change the availability percentage.

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Procedure

To change the availability of a team member to work on a team, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the left column, click **Members**.
3. On the Team Members page, in the row of the team member whose availability you want to change, click **Edit**.
4. On the individual team member's page, do *not* click the top **Availability** field. Instead, in a row beneath that field, click the availability percentage that you want to change, and use the small arrows to increase or decrease the percentage.
5. Click **Update**.

> **Tip**
> Only users with **JIRA Administrators** permission can add new roles to the list of roles. For information about adding roles, see the related topic below.

What to do next

You can return to the list of all team members by clicking **Members** in the left column.

Related topic

Team roles

Changing the dates of team membership

Extract from **Tempo Teams** (plug-in) version: 3.x.x

Team membership dates might have been set when users were added to the team. You can change the dates on which users plan to join and leave a team.

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Procedure

To change dates of team membership, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the left column, click **Members**.
3. On the Team Members page, in the row of the user whose membership dates you want to change, click **Edit**.
4. On the individual team member's page, do *not* click the top **Joining** or **Leaving** fields. Instead, in a row beneath those fields, click the Joining or Leaving date (or the blank space, if there is no date).
5. Click the calendar icon beside the field, and select a date.
6. Click **Update**.

What to do next

You can return to the list of all team members by clicking **Members** in the left column.

Deactivating membership of a team

Extract from **Tempo Teams** (plug-in) version: 3.x.x

You can temporarily deactivate a user's team membership without deleting the member's name from the Team Members page. In this way, you can easily reactivate membership at a later date.

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Procedure

To deactivate a user's team membership, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the left column, click **Members**.
3. On the Team Members page, hover over the row of the user whose membership you want to deactivate. A cogwheel icon is displayed at the end of the row.
4. Click the cogwheel icon, and then click **Deactivate**.
5. In the Deactivate Member window, click **Deactivate**.

   Users whose membership is deactivated are listed at the bottom of the Team Members page, with a status of INACTIVE.

Reactivating membership of a team

Extract from **Tempo Teams** (plug-in) version: 3.x.x

If a user's team membership status is INACTIVE, you can reactivate the membership.

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Procedure

To reactivate a user's team membership, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).

2. In the left column, click **Members**.

3. On the Team Members page, in the row of the user whose membership you want to reactivate, click **Edit**.

4. On the individual team member's page, the Leaving column displays the date on which the user's membership was deactivated. Click that date.

5. Delete the leaving date, or replace it with a future leaving date.

6. Click **Update**. The user's team membership status changes to ACTIVE.

What to do next

You can return to the list of all team members by clicking **Members** in the left column.

Removing members from a team

Extract from **Tempo Teams** (plug-in) version: 3.x.x

You can remove members from a team and delete their names from the Team Members page.

> **Tip**
> If a user is likely to rejoin the team at a later date, you can instead deactivate the users' team membership; the user's name remains on the Team Members page, with a status of INACTIVE. However, if you want to completely remove the user from the Team Members page, complete the procedure below.

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Procedure

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).

2. In the left column, click **Members**.

3. On the Team Members page, in the row of the team member whom you want to remove, check whether the right end of the row contains an **Edit** button, or the word '**via**' followed by the name of a JIRA group.

    - If the row contains an **Edit** button, the member was added individually to the team. To remove the member from the team, complete the following steps:

        a. Click **Edit**.

        b. On the individual team member's page, in the rightmost column, click **Delete**, and in the Delete Membership window, click **Delete** again.
        If the team member was added multiple times to the team (for example, for different periods or with different roles), repeat this step for every membership row on the page.

        c. You can return to the list of all team members by clicking **Members** in the left column.

    - If the row contains the word '**via**' followed by the name of a JIRA group, the member was added to the team as part of the JIRA group. To remove the member from the team, complete one of the following tasks:

        - Remove the user from the JIRA group (see Atlassian's documentation)

or

- Remove the JIRA group from the team, by completing the following steps:

    a. On the Team Members page, in the **Groups** section, in the row of the JIRA group that you want to delete, click **Delete**.

    b. In the Delete Member window, click **Delete**.

Related topic

Deactivating membership of a team

Switching type of working week

Extract from **Tempo Teams** (plug-in) version: 3.x.x

Each type of working week is defined in a *workload scheme*. If team members move to a different country, with different weekend days, or if team members change between part-time work and full-time work, you can move the team members to different workload schemes.

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

Note
The Team Lead role is not sufficient because any change in a team member's workload scheme is applied across all Tempo products and across all of the teams that the team member is a member of.

Procedure

To move a team member to a workload scheme, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the left column, click **Working Days**.
3. In the team member's row, click inside the **Workload Scheme** field.
4. Click again inside the **Workload Scheme** field, and select a workload scheme from the list.
5. Click **Update**.

Related topics

- Switching sets of public holidays
- Switching types of working weeks (alternative method)
- Defining a working week

Switching set of public holidays

Extract from **Tempo Teams** (plug-in) version: 3.x.x

A *holiday scheme* is a set of public holidays. If team members move to a different country, state, or region, you might be required to move them to a different holiday scheme.

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, or Tempo Budgets is installed)
- Tempo Administrators (if Tempo Timesheets is installed)

> **Note**
> The Team Lead role is not sufficient because any change in a team member's holiday scheme is applied across all Tempo products and across all of the teams that the team member is a member of.

Procedure

To move a team member to a holiday scheme, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the left column, click **Working Days**.
3. In the team member's row, click inside the **Holiday Scheme** field.
4. Click again inside the **Holiday Scheme** field, and select a holiday scheme from the list.
5. Click **Update**.

Related topics

- Switching types of working weeks

- Switching sets of public holidays (alternative method)
- Specifying public holidays

Granting team permissions to users

Extract from **Tempo Teams** (plug-in) version: 3.x.x

For each team, you can grant the following permissions to specific users:

Permission	What you get by default	Notes
Browse Team permission	Permission to: • See the team's information, including the team utilization report • Select this team on forms that contain a **Team** field (for example, the **Team** field in an issue)	All Team Members automatically receive Browse Team permission for their own teams.

On this page

In this chapter

<table>
<tr><td>Approve Timesheet permission</td><td>In Tempo Timesheets:
Permission to:
Review timesheets of Team Members.
Grant grace periods to Team Members to complete their timesheets after a scheduled closing date.
View the team timesheet and reports.
View Tempo team and account gadgets.
Approve accounts.
If the setting 'Enable timesheet approval process' is set to Mon thly (Period) or Weekly in Tempo Global Configuration, permission to:
Approve and reject timesheets of Team Members
View the approval logs of Team Members
Other permissions if the following check boxes are selected in Tempo Global Configuration:
'Users with Approve Timesheet Permission can set billed hours'
'Users with Approve Timesheet permission can export lists of account worklogs as PDF files'</td><td>Team Leads automatically receive Approve Timesheet permission for their own teams.
Tempo Team Administrators can grant themselves Approve Timesheet permission
To view other team members' worklogs on a timesheet, you must have View All Worklogs permission for the team's projects</td></tr>
<tr><td>Plan Time permission</td><td>In Tempo Timesheets:
Permission to plan time for team members to work on projects, project versions, and project components.
In Tempo Planner:
Permission to plan time for team members to work on projects, project versions, project components, and issues
If JIRA software or JIRA Agile is installed, permission to plan time for team members to work on sprints
Permission to plan work on the team backlog
Permission to plan time on projects</td><td>Team Leads automatically receive Plan Time permission for their own teams.
Tempo Team Administrators can grant themselves Plan Time permission
Plan Time permission works in Tempo Timesheets only if the following check box is selected in Tempo Global Configuration: 'Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets.'</td></tr>
</table>

Who can edit team permissions

Users with one of the following permission types or roles:

- Team Lead role
- Tempo Team Administrators permission
- JIRA Administrators permission

Tutorial

The following Tempo Planner video tutorial is valid also for other Tempo products.

Procedure

To edit team permissions, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configurati on**).

2. In the left column, click **Permissions**.

3. In the row of the permission that you want to edit, click inside the **Users** or **Groups** column .

   Editing team permissions (click to enlarge)

4. Add or delete users or JIRA groups, and click **Update**.

Linking teams to projects and boards

Extract from **Tempo Teams** (plug-in) version: 3.x.x

To be able to plan time for team members to work on issues, versions, or components, you must link one or more JIRA projects to the team. To be able to plan time for the team to work in JIRA Software or JIRA Agile sprints, you must link the corresponding JIRA Software or JIRA Agile board to the team.

Required permission

One of the following permissions or roles:

- JIRA Administrators permission
- Tempo Team Administrators permission
- Team Lead role

Tutorial

The following Tempo Planner video tutorial is valid also for other Tempo products.

Procedure

To link a team to a project or a JIRA Software or JIRA Agile board, complete the following steps:

1. Go to the team configuration page by completing the following steps:

a. On the main menu bar, click **Tempo**.
b. On the **Tempo** menu, go to the **Teams** section, and click **more**.
c. On the Teams page, click the team that you want to link to a project or board.
d. On the individual team page, click **Configuration**.

2. In the left column, click **Links**.

3. On the Team Links page, select the board or project that you want to link to the team, and click **+Link**.

Tip
You can link a team to multiple projects and boards. You can also link different teams to the same projects or boards.

Configuring and managing accounts

Tutorial

Account management with Tempo Accounts

Extract from **Tempo Accounts** (plug-in) version: 3.x.x

In this chapter

This page and its child pages, explain creation and management of accounts. The following is an overview, explaining how manually created accounts and imported accounts are handled simultaneously and how update affects existing accounts.

All account attributes can be updated, except the account Key. If the project link in an import file is **not** found on your JIRA instance, the account is not imported. This is reported in the message given at the final step of the import.

This entry in an import file can be corrected if appropriate and then imported again.

The possible account statuses are: **Open**, **Closed** or **Archived**. The table below describes how these statues are acquired and when the status is not affected by import.

Table: Explaining account statues and when it is not affected by import

Status	Description
OPEN	This is the default status for newly created or imported accounts. The status can also be set by manual configuration, given the account has previously had another status.
CLOSED	Accounts can only get this status by manual configuration.
ARCHIVED	This status is used for the following import cases: • An existing account (created manually or by import) is **not** in an import file and has **no** project link (and is not global). • Existing imported accounts, that are **not** in the next version of the import file. Accounts can also be *Archived* manually.

Unaffected	For existing accounts, the status is unaffected in the following import cases: • An existing account (created manually or by import) that **is** in an import file, but has **no** project link (and is not global). • For the case of imported and then manually edited accounts, where linked projects are affected, the status stays the same as before. If the first import has project links A and B, then project link C is added manually and in a new import the only project links are D and E. This means that after the import, the project links are going to be C, D and E, or only the imported links are updated, not the manually added ones.

A few notes:

- Only **Open** accounts will show up in JIRA issues and/or the Log Work dialog, depending on configuration.
- Tempo Timesheets reports can be created including **Closed** accounts, but not **Archived** a ccounts.
- The only way to look up **Archived** accounts, is by searching for them in the Accounts Navigator or select the Archived option in it's sidebar.

Administering accounts

Extract from **Tempo Accounts** (plug-in) ver sion: 3.x.x

The table below gives an overview of the Tempo Accounts administrative functions, that the JIRA Administrators needs to manage.

Table: Explaining the Tempo Accounts functions, configured by JIRA Administrators

Function	Description
Accounts Custom Field	The field is installed automatically with Tempo Accounts and is mandatory for activating accounts. Accounts add different dimension or business intelligence to Tempo data.
Granting permission to users	You can grant Tempo Account Administrators permission and Tempo Rate Administrators permission to users.
Accounts configuration	Allows you to configure properties for accounts. The property currently available is: *Clear Account value when issue is moved between projects*. Select the property if you do not want accounts to be included in the target project when moving an issue between JIRA projects.

Accounts custom field

Extract from **Tempo Accounts** (plug-in) ver sion: 3.x.x

The **Tempo Account** custom field is installed automatically with Tempo Accounts. To make use of the field in relation to the Tempo Products it needs to be associated in one of the following two ways:

- On a JIRA Issue level, which requires adding association with issue screens (see below).
- To Tempo Timesheets worklogs, which requires to add Account as a Worklog Attribute and the field will appear in the Log Work dialog.

The field is in both cases a drop-down showing accounts linked to the project, which the JIRA issue belongs to. JIRA project(s) are linked to an account, when it is created, imported or when it is being configured.

Related pages

- Creating an account
- Import and Export
- Configuring an account
- Accounts JQL Functions

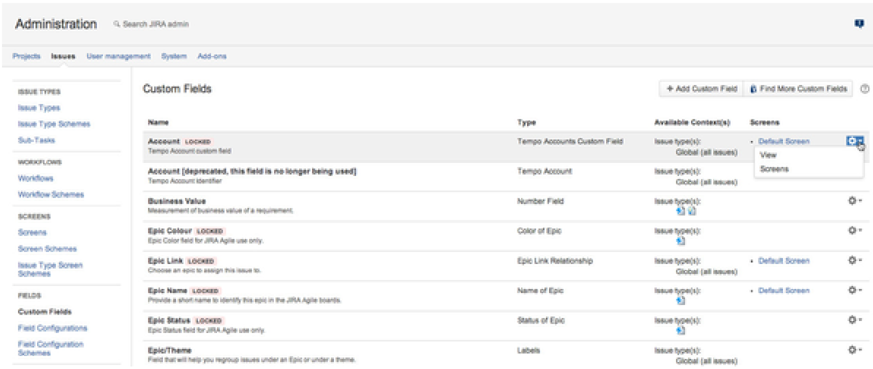
By activating accounts, Accounts JQL Functions become available.

The Account Custom Field is locked as it is required in Tempo. If you are not using the Tempo Accounts feature, remove this field from all your screens

The field is also used in Tempo Timesheets to produce revenue calculations for hours and expenses logged on an account.

Associating to Screens

Screenshot: JIRA Custom Fields page - click to enlarge



- Log in as a user with the **JIRA Administrators** Global Permission.
- Choose the **cog icon** at top right of the screen, then choose **Issues**, and select **Field s > Custom Fields** (left tabs).
  Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Custom Fields**.
- Find the **Tempo Account** field in the Custom Fields list.
- To associate it with to screens, click on the cog-wheel menu to the right in it's line and select the **Screens** option.
- The *Associate field Account to screens* page is displayed.
- Select how you want to associate the field to screen(s) (Default Screen, Resolve Issue Screen or Workflow Screen) and click the **Update** button.

Granting account permissions to users

Extract from **Tempo Accounts** (plug-in) version: 3.x.x

As a JIRA administrator, you can do all Tempo administrative tasks and grant yourself any Tempo user permission. The following table lists Tempo permissions that can be granted to users or to groups of users and which are defined in the Tempo Accounts system plug-in.

Note
Other Tempo permission types are defined in other Tempo system plug-ins or in Tempo products.

Permission or role	What you get	Notes	Who can give permission or role	Configuration location

Tempo Account Administrators permission	Permission to:
	• Create, configure, import, export, and delete accounts
	• Change the target revenue in account revenue reports
		• Only users with Approve Timesheet permission can approve accounts.
		• Only JIRA Administrators can configure the following account settings:
		  ◦ Whether the account value is cleared when issues are moved between projects
		  ◦ An alternative name for the account field
		  ◦ Whether an account value is required or optional in a field configuration
		• By default, JIRA Administrators receive Tempo Account Administrators permission
			JIRA Administrators	**Administration** cogwheel > **System** > SECURITY **Global Permissions**

Tempo Rate Administrators permission	Permission to: • Set price rates for team roles in different teams • Change the target revenue on account revenue reports	Price rates are used for revenue reports and billing.		

Accounts configuration

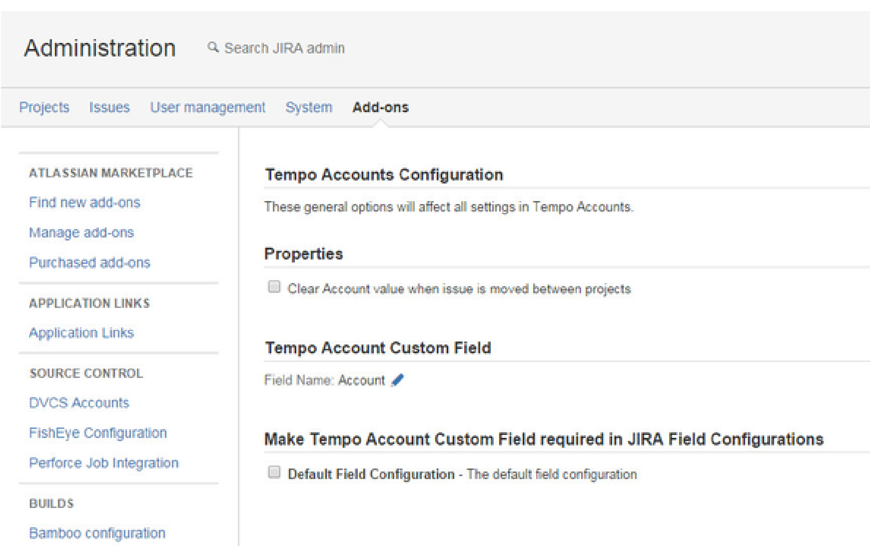
Extract from **Tempo Accounts** (plug-in) version: 3.x.x

This page explains the Tempo Accounts administrative section, which is only available for JIRA Administrators. It does currently only have one item called **Accounts Configuration**, where properties for accounts are configured.

To configure a property, open the Accounts Configuration by:

1. Logging in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Scroll down the left sidebar until you see the **Tempo Accounts** configuration group and select **Accounts Configuration**.
   Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing Accounts Configuration.

The Tempo Accounts Configuration screen (click to enlarge)



On this page

Related pages

- Administer Accounts
- Accounts Custom Field

Clear Accounts from JIRA Issues

Clear Account value when issue is moved between projects is not selected by default. Select this property if you do not want accounts to be included in the target project when moving an issue between JIRA projects. This is explained further in the table below.

Table: How Clear Account value when issue is moved between projects works in relation to account settings

Propety setting	Account setting	Results in
Disabled	N/A	Assigned accounts **are moved** with the JIRA issue.
Enabled	Accounts are assigned to JIRA Projects	Assigned accounts are **not moved** with the JIRA issue.
Enabled	Accounts are used as Worklog Attributes	Selected accounts as a worklog attribute **remain** on each worklog. The account can be viewed in the Issue Timesheet and the Advanced Timesheet, with the status: "*Warning: Account not in project"* in list view

Tempo Account Custom Field Name

The default name of the Tempo Account Custom field is Account but you can rename this field in this section.

Make Account Required

All Filed Configurations on your instance is displayed in this section. The Tempo Account field is not required by default but you can click the box displayed in front of each Field Configuration to make it required in all project using the selected Field Configuration

Tempo accounts navigator

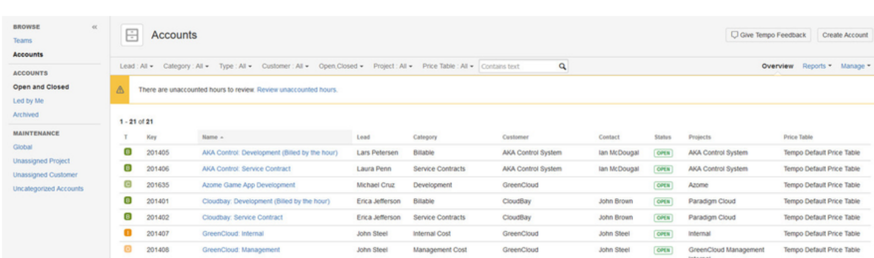
Extract from **Tempo Accounts** (plug-in) version: 3.x.x

A Tempo account can represent a customer project, a cost center, or a contract. You can link JIRA issues to accounts and categorize work by, for example, type of work, customer, or project. In the accounts navigator, you can view a list of all accounts that you have access to. You can search and filter accounts that are linked to JIRA projects. You must have permission to view the projects.

Accessing the accounts navigator

Click **Tempo** > ACCOUNTS **more**.

The accounts navigator (click to enlarge)



Creating an account

Required permission

Tempo Account Administrators permission

Procedure

1. In the accounts navigator, in the upper-right corner, click **Create Account**.
2. In the Create Account window, fill in the requested information, and click **Create**.

Related topic

Creating an account

Filtering the list of accounts

Above the list of accounts, the filter menu bar contains filter attributes, such as **Lead**, **Category**, and **Type**.

Filtering by searching

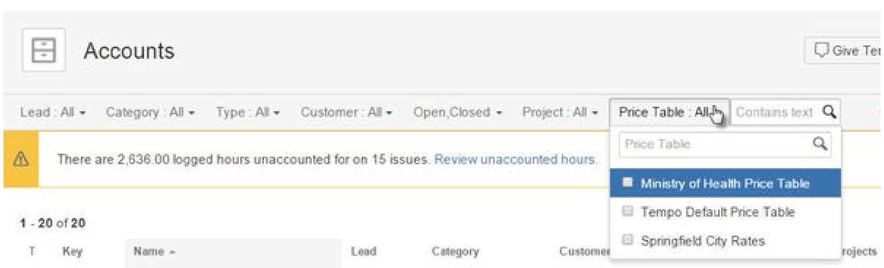
On the filter menu bar, in the search field, type text that you want to search for, and press Enter. Accounts that contain the text in one or more of the fields of the account are listed. The Status and Projects (Links) fields are not searched.

Filtering by selecting attribute values

Complete the following steps:

1. On the filter menu bar, click a filter attribute.
2. From the list that is displayed, select one or more values of the attribute.

Filter example - by Price Table



Listing accounts that have no category, no customer, or no linked project

To list accounts that have no category, complete the following steps:

1. On the filter menu bar, click **Category**.
2. On the list of menu options that is displayed, at the bottom, select **No Category**.

Similarly, you can list accounts that have no customer or no linked project.

Selecting predefined filters

To display...	On the left sidebar...
All active accounts that are linked to projects that you have permission to view	Click **Open and Closed**.

On this page

All accounts that you lead	Click **Led by Me**.

If you have Tempo Account Administrators permission, you can filter the list of accounts to display all archived accounts, global accounts, or accounts that are not associated with a project, customer, or account category, by clicking the corresponding options on the left sidebar.

Related topics

- Granting permission to users
- Configuring an account

Sorting the list of accounts

By default, the account list is sorted alphabetically by account name. You can sort the list by type (T), key, lead, category, customer, contact, or status by clicking the corresponding column heading.

Reviewing a list of unaccounted hours

If Tempo Timesheets is installed and if hours are unaccounted for because, for example, an issue is not linked to an account, you can review the Unaccounted Hours page and account for all hours on that page.

Related topic

In the Tempo Timesheets documentation: Unaccounted hours

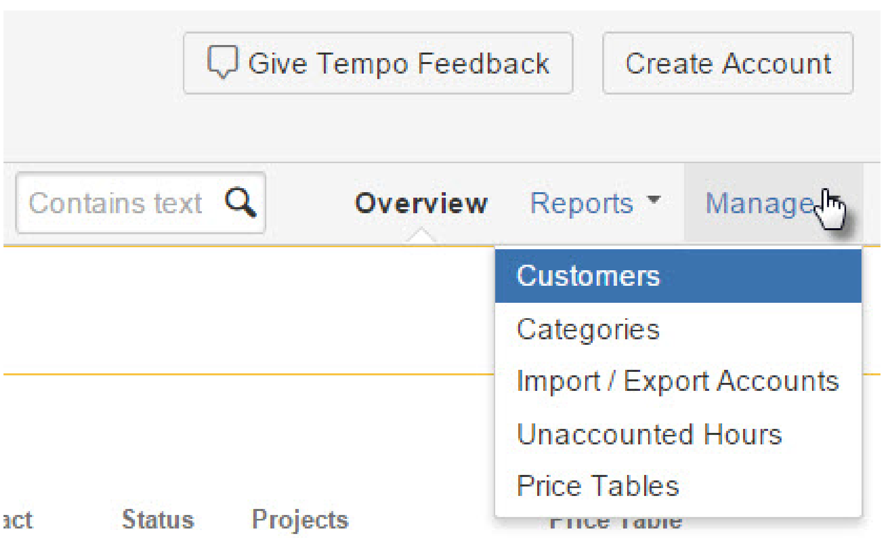
Viewing the list of customers

Required permission

Tempo Account Administrators permission

Procedure

In the accounts navigator, in the upper-right corner, click **Manage** > **Customers**.



Related topics

- Granting permission to users
- Managing customers

Viewing lists of account and expense categories

- Account categories group accounts by type of logged hour, together with, for example, service provided: 'Billable hours - Website improvements'; or department: 'Internal hours - Marketing.'
- Expense categories could be, for example, "Travel," "Accommodation," and "Meals".

Required permission

Tempo Account Administrators permission

Procedure

On the Accounts page, in the upper-right corner, click **Manage** > **Categories**.

Related topic

Categorizing accounts

Viewing hourly rates

If Tempo Timesheets is installed, you can view the hourly rates at which your company charges customers, based on team roles. Hourly rates are defined in price tables.

Required permission

Tempo Account Administrators permission

Procedure

On the Accounts page, in the upper-right corner, click **Manage** > **Price Tables**.

Importing and exporting account data

You can move account data between Tempo Timesheets and external systems or applications.

Required permission

Tempo Account Administrators permission

Procedure

On the Accounts page, in the upper-right corner, click **Manage** > **Import / Export Accounts**, and follow the instructions on the screen.

Related topic

Import and Export

Exporting worklogs as a PDF file

If Tempo Timesheets is installed, you can export a list of all worklogs for an account over a selected period as a PDF file.

Required permission

- Approve Timesheet permission
- The following setting must be enabled in Tempo global configuration: 'Users with Approve Timesheet permission can export lists of account worklogs as PDF files.'

Procedure

See the Tempo Timesheets documentation: Exporting worklogs as a PDF file.

Creating accounts

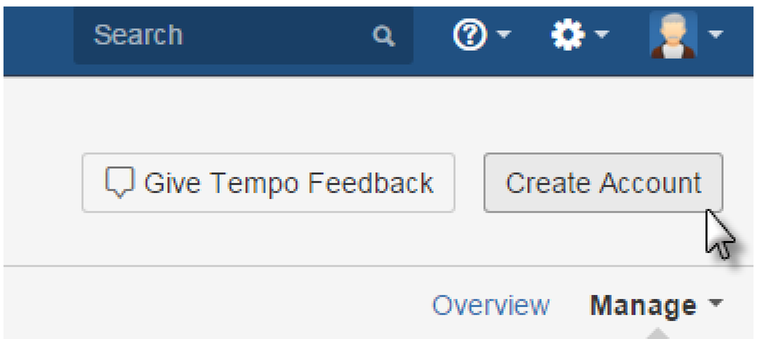
Extract from **Tempo Accounts** (plug-in) version: 3.x.x

This page explains how to create accounts manually, but it is also possible to import them in a pre-made *.csv or *.xml file.

The Accounts Custom Field is installed automatically with Tempo Accounts, but may need to be configured further, depending on how you want to associate the account information.

To start the process of creating an account, click on the **Create Account** button in the top right corner of the Accounts Navigator.

The Create Account button in the Accounts Navigator



This opens the Create Account dialog as in the screenshot below. The dialog options are explained in a table below.

The Create Account dialog (click to enlarge)

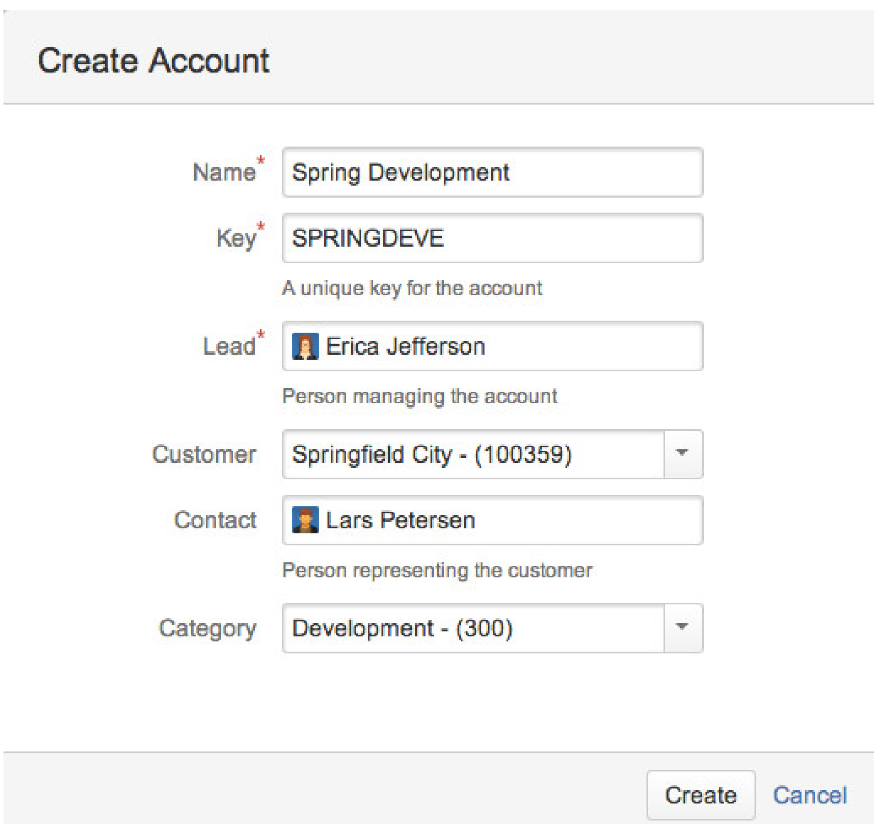


Table: The Create Account dialog options explained

In this chapter

Related pages

- Accounts Custom Field
- Accounts JQL Functions

Field	Description
Account Name	Descriptive name for the account. The combination of the Account Key and Name is used to display the account in a JIRA Issue or in the Log Work dialog in Tempo Timesheets, depending on configuration.
Account Key	The Account Key needs to be **unique** for the account. The dialog gives a suggestion for it based on the Account Name when it is added. The key can be a combination of any letter (a-z, A-Z), digit (0-9), underscore ("_"), dash ("-") or a dot (".").
Account Lead	The **Account Lead** is responsible for the account. The value provided for the Account Lead can either be a *JIRA username* or simply a typed *name*: • If this value is a JIRA username and matches an existing username, this user is stored as the Account Lead. • If the value provided is simply a typed name, it is used as it stands.
Customer	Select a customer from the drop-down menu to associate with the account. The customer doesn't need to be an outside customer, it may simply be a way to group together a common entity (JIRA projects or cost centres) of your definition for the projects linked to the account.
Contact	This is someone who represents the customer. Depending on the purpose of the account, for internal or external use, this person may of may not be a JIRA user.
Category	Select a category from the drop-down menu to associate with the account. The category is a way to create a division for an Account/Customer like *Development* or *Market ing*.

It is not mandatory to add a customer, a contact or category initially, as it can be configured lat er. Adding Account Attributes (customers and categories) is explained in this chapter on separate pages

Click the **Create** button at the bottom of the dialog to save the account or the **Cancel** link to opt out of the process.

Configuring accounts

Extract from **Tempo Accounts** (plug-in) ver sion: 3.x.x

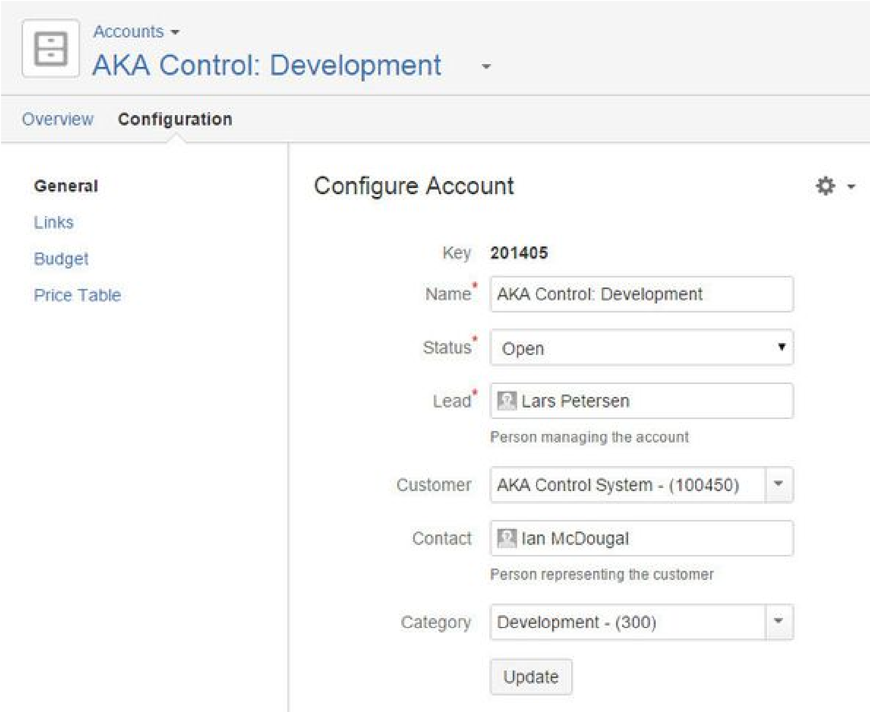
This page explains how previously created accounts, either manually or imported, can be configured afterwards. The configurations that are available for each account, are **Configure** and **L inks**. Given that the user has already chosen an account, click on the **Configuration** tab for the account, to access these functions - see the first screenshot below.

On this page

Configuring an account

Click on the *Configure* link in the left sidebar, to open the screen to configure the account.

The Configure Account screen (click to enlarge)



In this chapter

Related pages

- Accounts Custom Field
- Accounts JQL Functions

The attributes available to configure an account, are the same as when Creating an account, except the Account Status can be updated additionally.

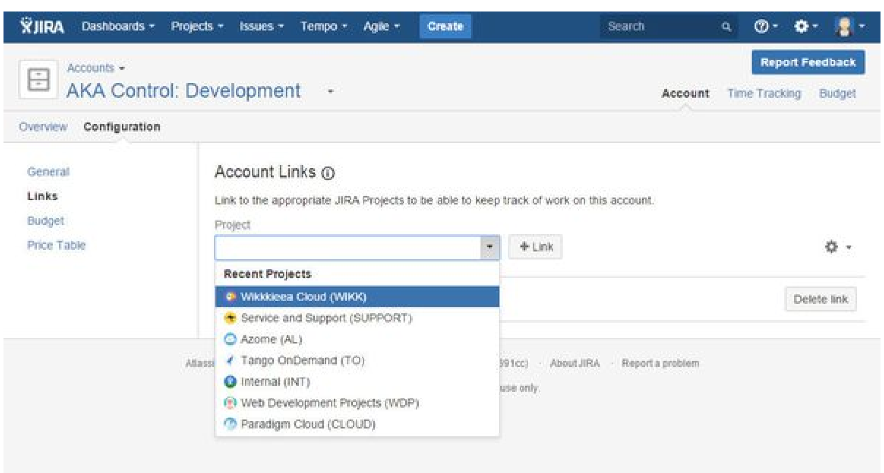
The available values for the Account Status are, *Open*, *Closed* or *Archived*. The default value for a newly created account is *Open*.

Click the **Save** button when finished editing the account or the **Cancel** link to opt out.

Linking account to JIRA projects

JIRA Projects can be linked to the account. This needs to be done for accounts, so they become useful entities in other Tempo products. In other words, by linking projects to the account and with the Accounts Custom Field set for your needs, the account becomes a select option, either in JIRA issues or the Log Work dialog. Click on the *Links* link in the left sidebar, to open the screen to link projects to the account.

Configuring Account Links (click to enlarge)



Click on the *Add projects to account* field to open a drop-down to link a project to the account. By selecting a project, it is added to a list of project(s) below the field.

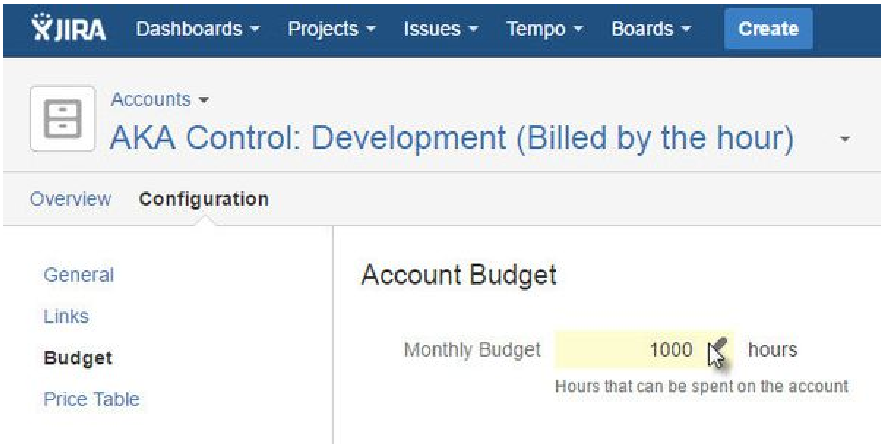
Related topic

[Linking accounts to projects]

Adding a monthly budget to an account

Monthly Budget is used in Tempo Timesheets and displayed in the in Tempo Monthly Budget Burn-up Chart gadget.

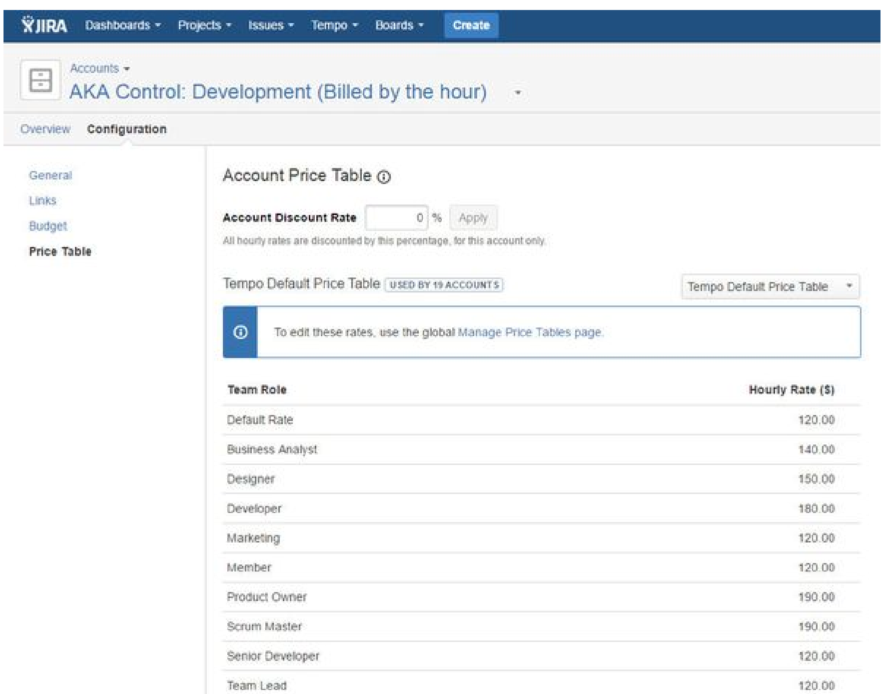
Tempo Accounts Budget configuration page



Configuring price table

In Tempo Timesheets 8, a discount on the Price Table can be defined for an account in the **Accou nt Price Table** for each account.

Tempo Account Price Table



Linking accounts to projects

Extract from **Tempo Accounts** (plug-in) version: 3.x.x

This page explains how to link a Tempo Account to JIRA projects.

On this page

In this chapter

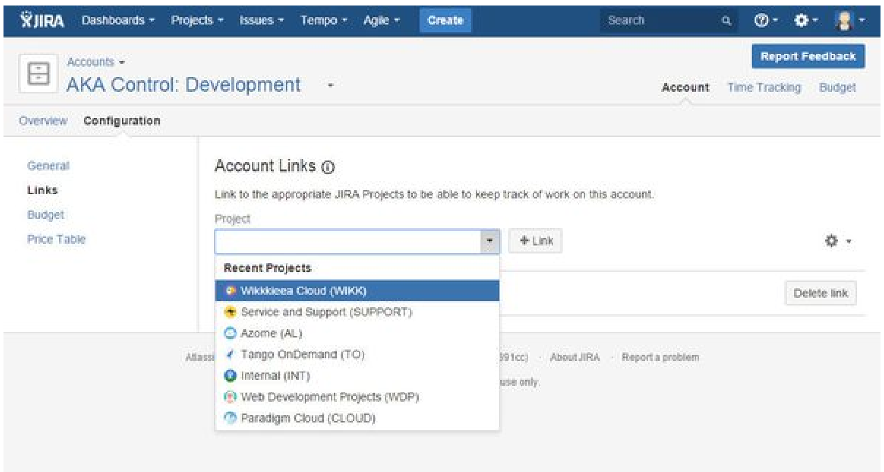
Link on Create

Accounts can be linked to one or many JIRA projects. The projects can be included in the imported file if the accounts are created with any of the Accounts Import features.

In Accounts Configuration

Users with Tempo Account Administrators permission can link accounts to projects in the *Links* page displayed in Account Configuration for the selected account.

The Links page in Accounts Configuration



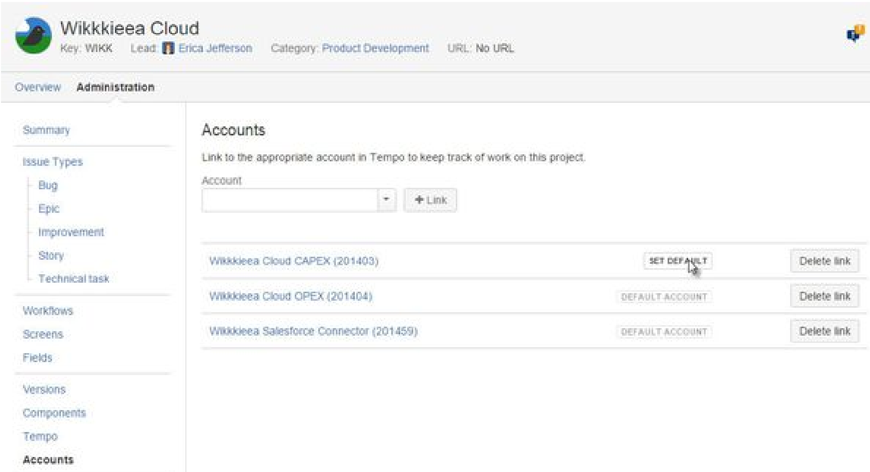
Related topics

- Linking accounts to all projects
- Unlinking global accounts from all projects

In Project Administration

Users with Tempo Account Administrators permission and who are in the Administration Role for the selected project can open the Accounts page in project administration.

Accounts section in Project Administration



On this page you have the option to select an account as default for the project.

JIRA Issues created before linking their project to an account do not automatically become set to the account value. The value needs to be set afterwards and it is possible to bulk edit the JIRA issues.

Linking accounts to all projects

Extract from **Tempo Accounts** (plug-in) version: 3.x.x

Accounts that are linked to all projects are called *global accounts*.

Keep the number of global accounts to a minimum because global accounts have a negative impact on Tempo Timesheets speed performance.

Required permission

You require one of the following permission types:

- Tempo Account Administrators
- JIRA Administrators

Procedure

To link an account to all projects, complete the following steps:

1. Go to the account configuration page (**Tempo** > ACCOUNTS **more** > *name of account* > **Configuration**).
2. In the left column, click **Links**.
3. On the Account Links page, on the right side, click the cogwheel icon > **Link account to all projects (global)**.

Unlinking global accounts from all projects

Extract from **Tempo Accounts** (plug-in) version: 3.x.x

Accounts that are linked to all projects are called *global accounts*.

Keep the number of global accounts to a minimum because global accounts have a negative impact on Tempo Timesheets speed performance.

Required permission

You require one of the following permission types:

- Tempo Account Administrators
- JIRA Administrators

Procedure

To unlink a global account from all projects, complete the following steps:

1. Go to the account configuration page (**Tempo** > ACCOUNTS **more** > *name of account* > **Configuration**).
2. In the left column, click **Links**.
3. On the Account Links page, click **Disable to Improve Performance**.

The account is no longer a global account. The account is linked to no projects.

Managing customers

Tutorial

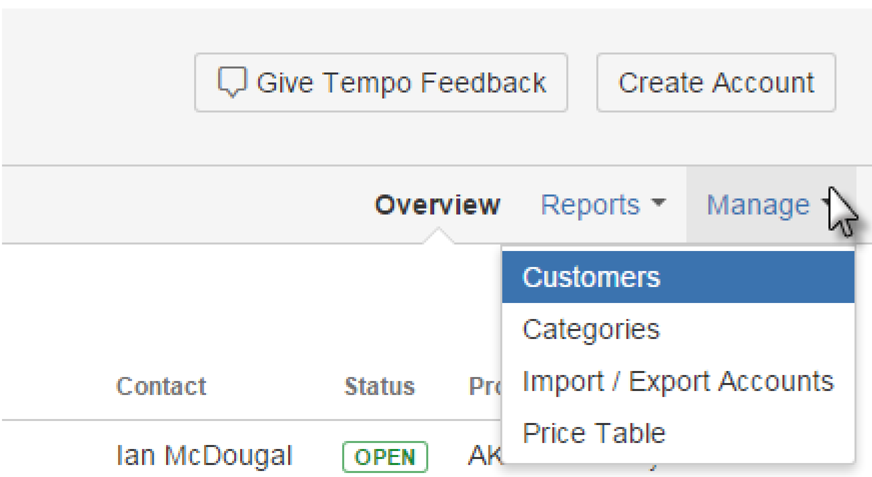
Customer overview

Extract from **Tempo Accounts** (plug-in) version: 3.x.x

Customers can be selected or created when the account is created or managed from the Tempo Accounts Navigator.

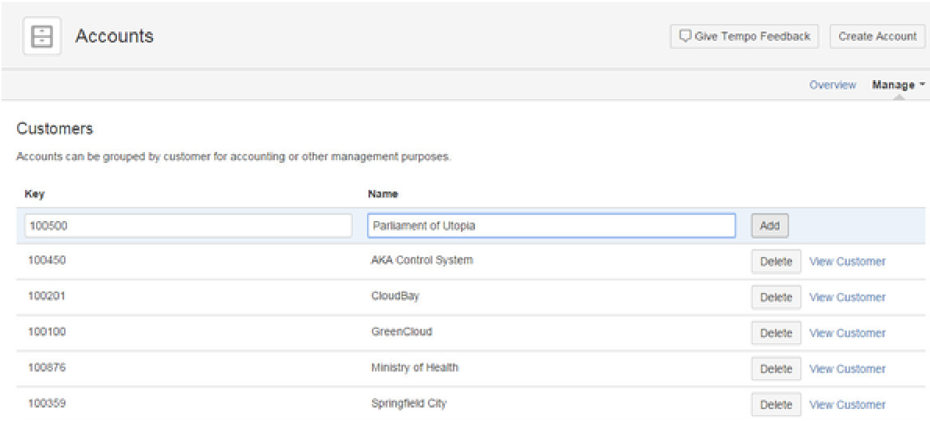
In this chapter

Accessing Customers in Tempo Accounts Navigator



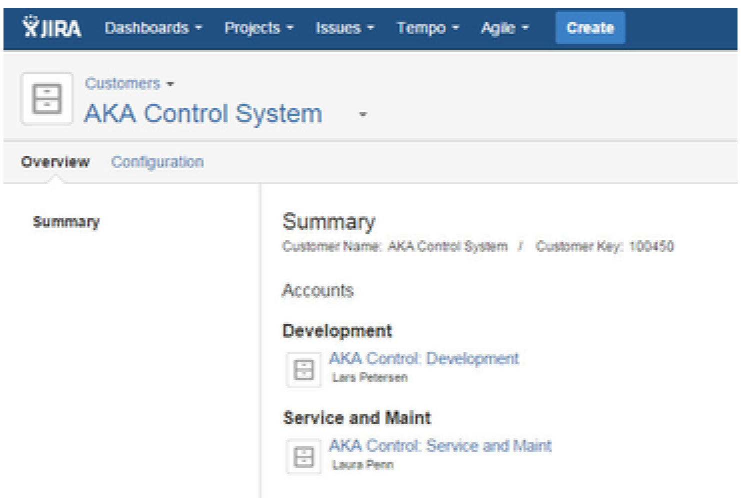
This opens the Customer screen as in the screenshots below. To add a Customer, type in a unique *Key* and *Name* for it and click the *Add* button at the end of the line.

Adding a new customer for accounts (click to enlarge)



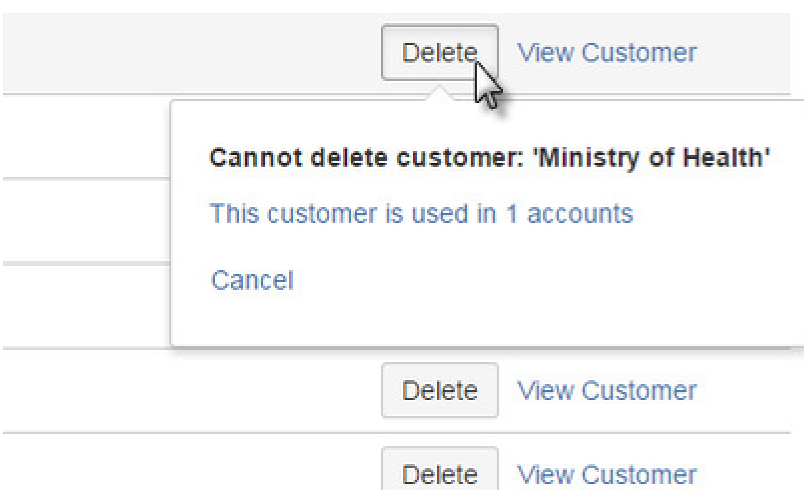
All Customers in the system are listed alphabetically by *Name*. You can view the Customer Overview page by clicking the *View Customer* link.

Overview page for the AKA Control System customer

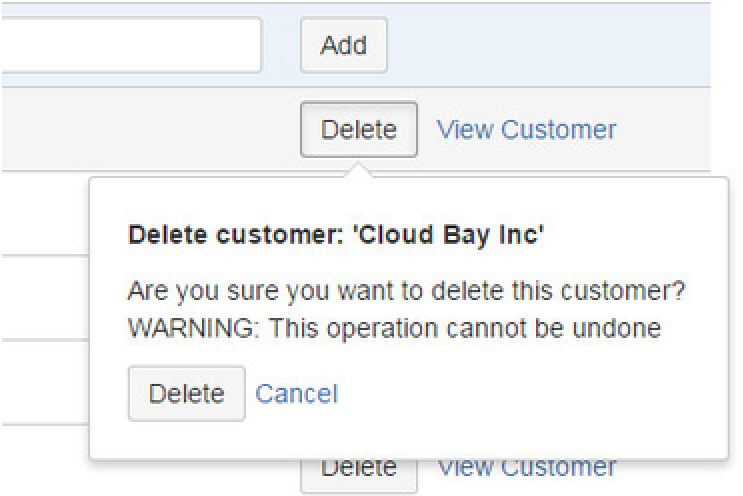


To delete a Customer, click on the **Delete** button for the selected customer to open the Delete Customer dialog. If the customer is linked to an account a message is displayed and you can´t delete until the customer has been removed from the account.

Confirmation dialog for an active customer



To confirm the deletion, click on the **Delete** button in the message window or the **Cancel** link to opt out.



Categorizing accounts

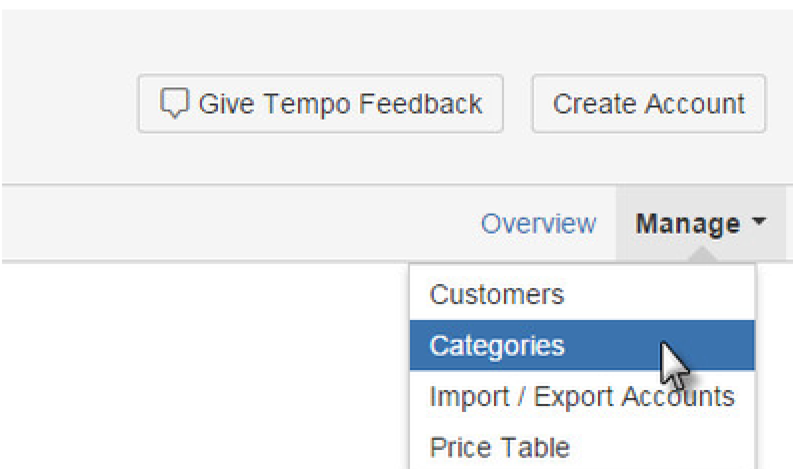
Extract from **Tempo Accounts** (plug-in) version: 3.x.x

In this chapter

You can create categories to group accounts by type of logged hour, together with, for example, service provided: "Billable hours - Website improvements"; or department: "Internal hours - Marketing."

You can select or create a category when you create an account, or you can manage categories from the Tempo Accounts Navigator.

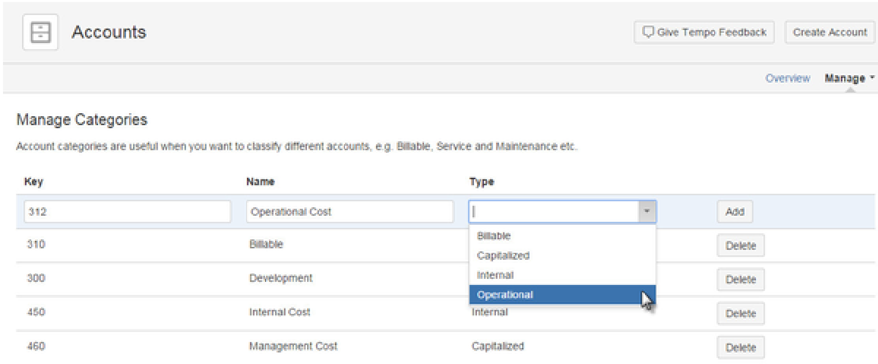
Accessing categories in the Tempo Accounts Navigator



Adding categories

To add a category, on the Manage Categories page, type in a unique key, name, and type, and click **Add**. (See the field descriptions below.)

Adding a new customer for accounts (click to enlarge)



Fields

Key

You can assign keys to categories, to match, for example, the codes of external billing systems.

Name

All categories in the system are listed alphabetically by name.

Type

The information in the **Type** field is used in the Team Utilization report. Select one type of logged hour (billable, capitalized, internal, or operational) for each category. The type is applied to all logged hours in all accounts of the category. The following table shows some typical uses of the different types:

Type	Description
Billable	• Logged hours that are billed to a customer; for example, for consultancy work for a customer • Logged hours that are billed internally; for example, an internal service department might bill other departments
Capitalized	Logged hours that add capital to the business and are not billed; for example, hours that are invested in product development.
Internal	Hours that are logged to ongoing tasks within the company that are not billed and do not directly add value to the business; for example, time spent attending staff meetings, going on vacation, or being on sick leave.
Operations	Logged hours related to day-to-day operation of the business; for example, time spent on marketing activities, internal systems, or customer support (other than billable support).

Deleting categories

You cannot delete categories that are linked to accounts; first, you must remove the category from the accounts.

Importing and exporting accounts

Extract from **Tempo Accounts** (plug-in) version: 3.x.x

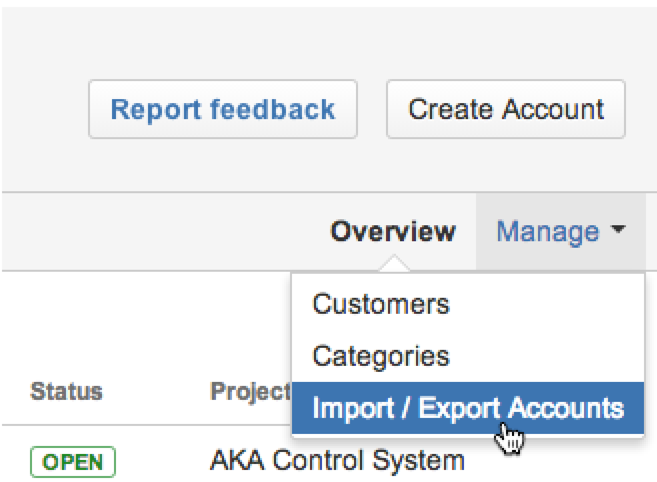
This page and it's child pages, explain how accounts can be imported and exported with Tempo Accounts.

The Accounts Custom Field is installed automatically with Tempo Accounts, but may need to be configured further, depending on how you want to associate the account information.

The import can be done by setting the data up in either CSV or XML file format. The CSV file can either be in a custom format or imported from template. The third option is to wrap the data into an XML file to import them from service. Previously imported or manually created accounts, can also be exported in the Tempo Accounts Template CSV format.

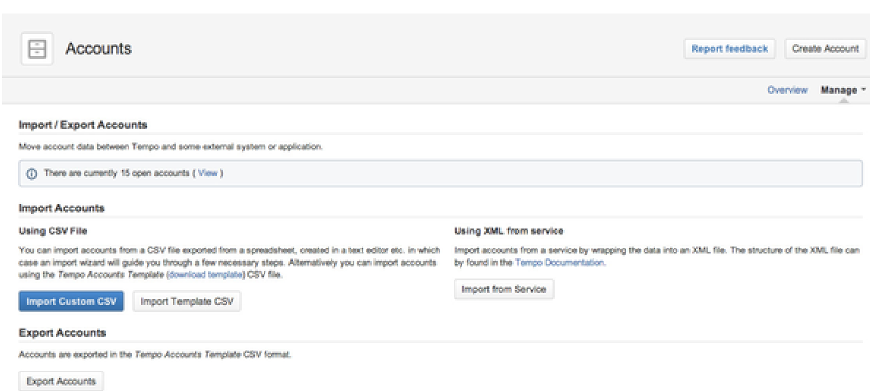
The import and export is available only for users with the Tempo Account Administrators permission, which gives access to the **Manage** menu in the top right corner of the Accounts Browser. Select the **Import / Export Accounts** option from the Manage drop-down menu.

The Import / Export Accounts option in the Manage drop-down menu



This opens the **Import / Export Accounts** screen, as shown in the screenshot below, with the options discussed above. To Export Accounts, simply click on the **Export accounts** button and a *.CSV file will be downloaded.

The Import / Export Accounts screen (click to enlarge)



The delimiter between attributes in the file is a semicolon (";") as in the imported file.

The exported file includes an additional column for informational purpose. This column is showing the account Status and is not imported in the Import Template CSV.

Account status

In this chapter

Extract from **Tempo Accounts** (plug-in) version: 3.x.x

Account Statuses

In this chapter

The table below show all statuses for Tempo Accounts and the usage for each status

Status	Usage
OPEN	Active Account • Displayed in issue view • Displayed in Account field in linked project issues • Search-able in Tempo Timesheets Account Search • All worklogs displayed in Tempo Timesheets reports • All worklogs included in the API export file
CLOSED	Active Account • Displayed in issue view if selected while in Open status • ***Not search-able*** in Tempo Timesheets Account Search • ***Not displayed*** in Account field in linked project issues • All worklogs displayed in Tempo Timesheets reports • Account displayed in *Select All Accounts* in Account Timesheet • All worklogs included in the API export file
ARCHIVED	Not Active Account • Displayed in issue view if selected while in Open status • ***Not search-able*** in Tempo Timesheets Account Search • ***Not displayed*** in Account field in linked project issues • All worklogs displayed in Tempo User Timesheets and reports • Account ***not displayed*** in *Select All Accounts* in Account Timesheet • ***No worklogs*** displayed in Tempo Account Timesheets and reports • All worklogs included in the API export file

Statuses can be changed on the Account Configuration page and with importing csv or xml files

Change Account Status in Importing

The following table shows the Account status change if imported with CSV Template or import XML from Service

Status Before Import	Project Link	Included in csv/xml	Status After Import
OPEN	Yes	Yes	OPEN
OPEN	No	Yes	OPEN
OPEN	Yes	No	ARCHIVED

OPEN	No	No	ARCHIVED
CLOSED	Yes	Yes	CLOSED
CLOSED	No	Yes	CLOSED
CLOSED	Yes	No	ARCHIVED
CLOSED	No	No	ARCHIVED
ARCHIVED	Yes	Yes	OPEN
ARCHIVED	No	Yes	OPEN
ARCHIVED	Yes	No	ARCHIVED
ARCHIVED	No	No	ARCHIVED

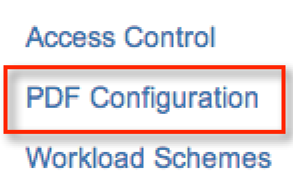
Change Account Status in Importing

The following table shows the Account status change if imported with Custom CSV

Status Before Import	Project Link	Included in csv	Status After Import
OPEN	Yes	Yes	OPEN
OPEN	No	Yes	OPEN
OPEN	Yes	No	OPEN
OPEN	No	No	OPEN
CLOSED	Yes	Yes	CLOSED
CLOSED	No	Yes	CLOSED
CLOSED	Yes	No	CLOSED
CLOSED	No	No	CLOSED
ARCHIVED	Yes	Yes	OPEN
ARCHIVED	No	Yes	OPEN
ARCHIVED	Yes	No	ARCHIVED
ARCHIVED	No	No	ARCHIVED

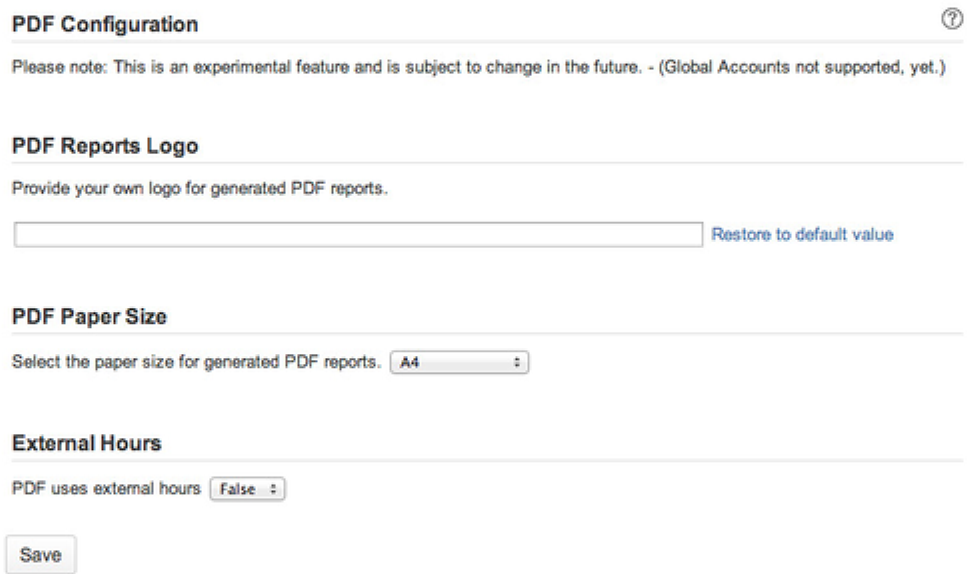
Configuring PDF worklog reports

The PDF Configuration option is displayed in the Tempo Timesheets administration menu.



Click this option to open the **PDF Configuration** page, where you configure global settings for the generated reports.

The PDF Configuration page overview (click to enlarge)



The PDF Configuration page is explained below:

- You can include a **logo** in every report, by copying its url into the **PDF Reports Logo** field.
  Click the *Restore to default value* link if the logo has been uploaded through JIRA's Look and Feel configuration.
  - The max size for the logo is: *max height = 46 px* and *max width = 200 px*.
  - If the size is bigger, the logo is scaled to the max size.
- The **PDF Paper Size** can be adjusted to: A4 (default), Letter, Legal or A4 Landscape.
- Choose if **External Hours** are used or not, e.g. True or False. If the value is set as **True**, it means that the hours from an externally integrated system are used.

Once the options have been adjusted as needed, click the **Save** button at the bottom.

The option Export to PDF is displayed in the Export menu for the Report view of the Account Timesheet and in Tempo accounts navigator.

Related topic

Exporting worklogs as an Excel file

Worklog date validation

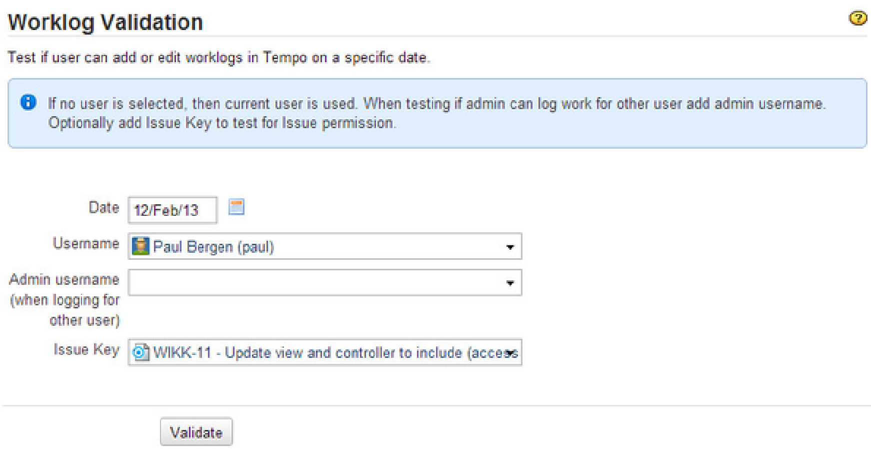
To access **Worklog Validation** take the following steps:

1. Log in as a user with Tempo Administrators permission.
2. Select **Administration** from the **Tempo drop-down menu** in the top navigation bar, choose **Worklog Validation** (left tabs).

This function helps administrators to find out why a user can't Log Work or Edit Worklogs on a specific date. The reason why a user can or can not add or edit a work-log depends on a combination of the following:

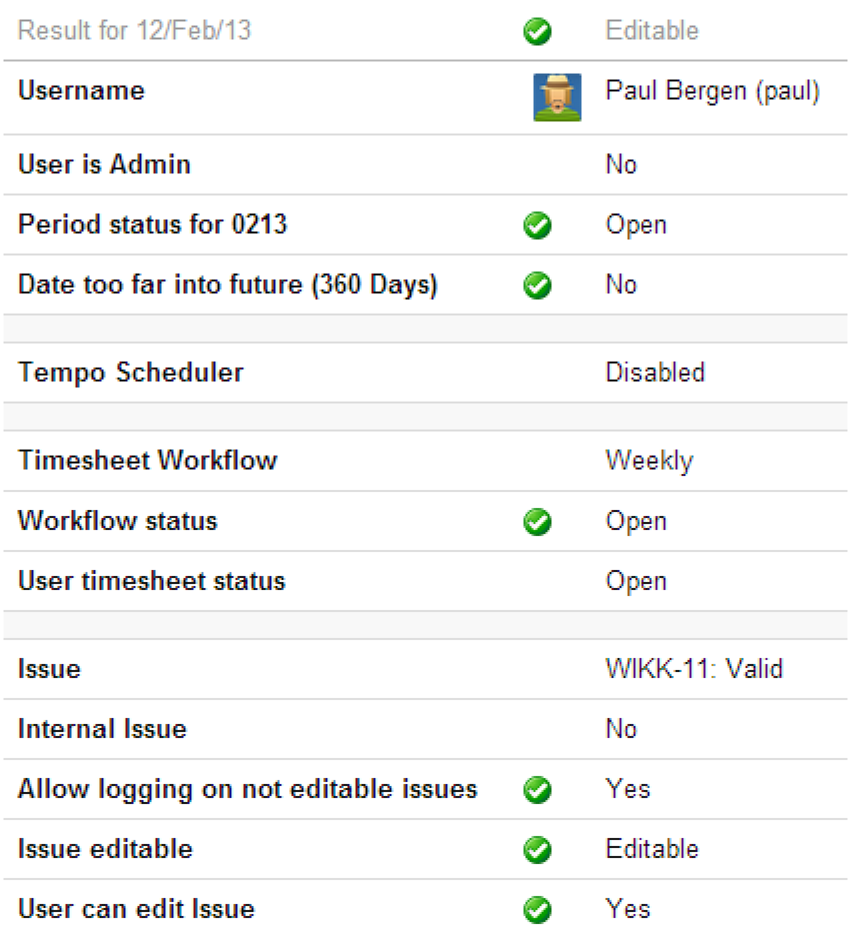
- The Tempo period status
- The Timesheet Workflow status
- The Tempo Scheduler settings
- The User status
- The Issue Type and Issue Permission
- If the date is too far into the future

The Worklog Validation page:



Fill in the fields on the Worklog Validation page and click the **Validate** button to get the result.

The validation result for a user:



Result for 12/Feb/13	Editable
Username	Paul Bergen (paul)
User is Admin	No
Period status for 0213	Open
Date too far into future (360 Days)	No
Tempo Scheduler	Disabled
Timesheet Workflow	Weekly
Workflow status	Open
User timesheet status	Open
Issue	WIKK-11: Valid
Internal Issue	No
Allow logging on not editable issues	Yes
Issue editable	Editable
User can edit Issue	Yes

Access control

An **IP addresses** can be selected for those, that are allowed to access **Tempo Services** to download account information from Tempo Accounts.

To open **Access Control**, do the following:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon: ⚙) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Access**

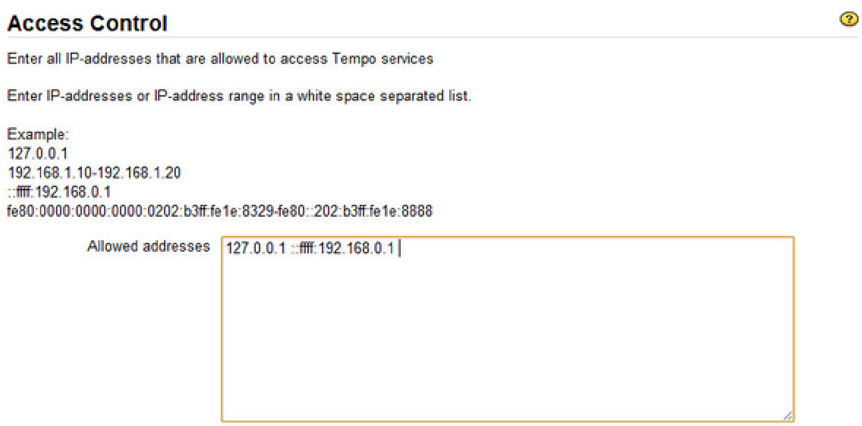
Related pages

- Tempo Servlets Manual

Control option.
Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Access Control**.

The Tempo services are:

- **GetWorklogs**: Gets all worklogs for a given period, returns data in specified format (XML, Excel or test data).
- **UpdateWorklogs**: Updates worklogs with external information (external ID & external hours).
- **WorklogReport**: Returns a worklog report in XML that can be used as input for a reporting tool.
- **BillingKeyList**: Returns a list of available billing keys and is used when creating reports.
- **HolidayList**: Returns a list of registered holidays to be used when calculating required hours in an external system.



Enter the IP addresses as a white space separated list or as a range of IP addresses
In the example above there are two allowed adresses: 127.0.0.1 and one IPv6 address

Please note that the **Allowed addresses** field is 254 characters

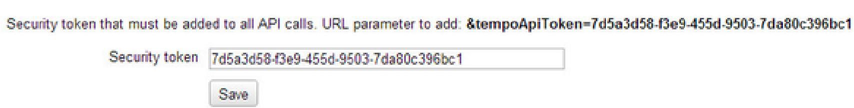
Tempo API Security Token

A **security token** is required and needs to be added to all Tempo API calls if used.

The **tempoApiToken** should of course be distributed on a "need-to-know" basis and changing the token will revoke the API access from all users until they update their token.

The **tempoApiToken** adds an extra level of security in Tempo Access Control. Usage example:

- The security token (**tempoApiToken**) is set to "my-token"
- **GetWorklogs** URL would then be something like this: http(s)://yourserver.yourdomain/plugins/servlet/tempo-getWorklog/?format=xml&tempoApiToken=my-token



The security token was **optional until Tempo 7.3.3** and is generated for users that did not have one configured before updating Tempo.

Viewing Tempo license and version details

All Tempo licenses are managed by Atlassian.
Please contact Atlassian if you are experiencing problems with your license.

You can get an overview of the status of your Tempo Timesheets license and version details of all installed Tempo products.

Required permission

One of the following permission types:

- JIRA Administrators
- Tempo Administrators

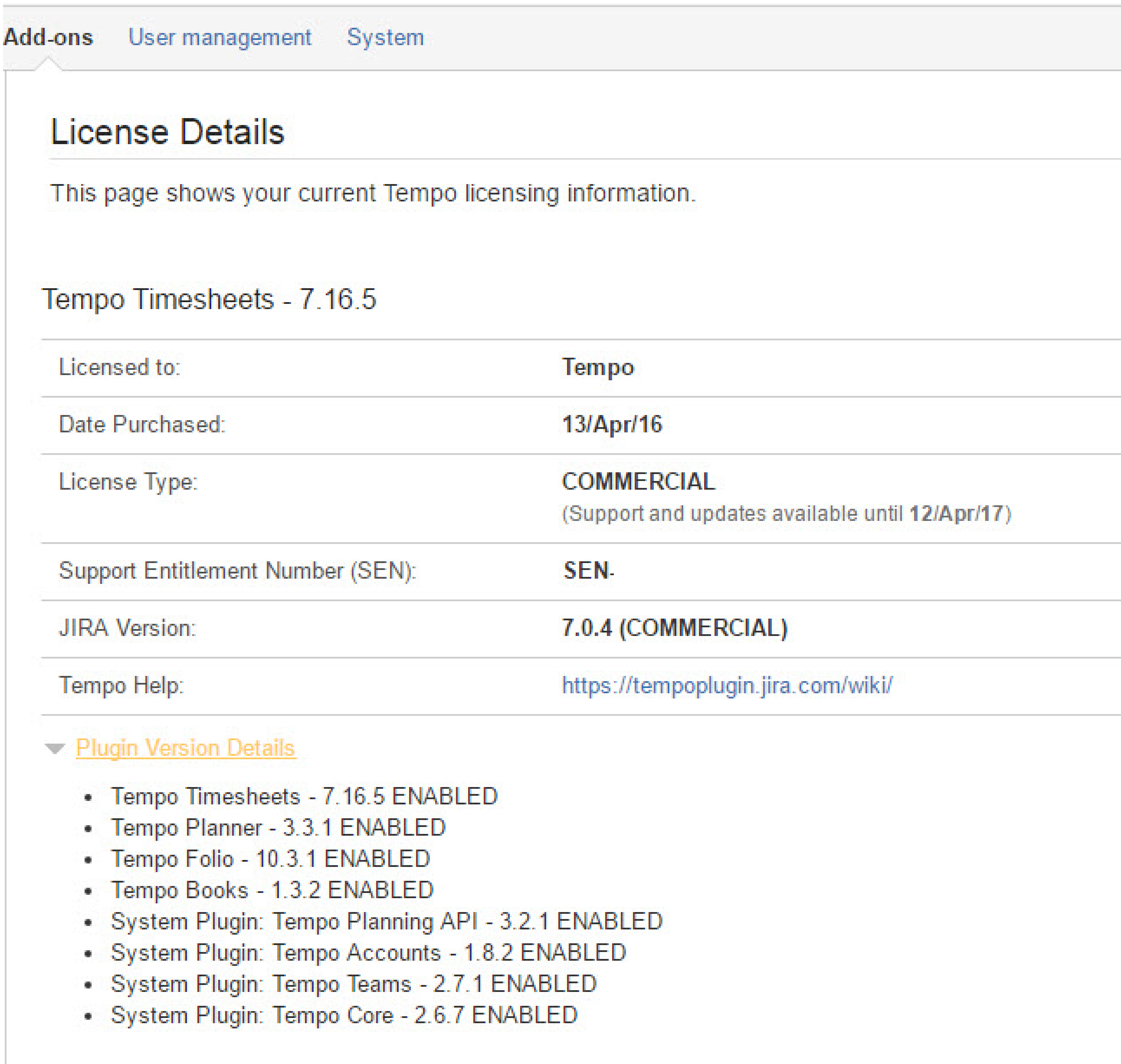
Procedure

To view Tempo license and version details, complete the following steps:

1. Do one of the following tasks:

    - If you are a JIRA Administrator, on the top menu bar, click the **Administration** cogwheel > **Add-ons**.
    - If you are a Tempo Administrator, on the top menu bar, click **Tempo** > **Administration**.

2. In the left column, in the **Tempo** section, click **License Details**.



JIRA Administrators can also enter or view a license key. For instructions, see the following Atlassian topic: Viewing installed add-ons.

Helping Tempo to improve products and services

Please read our privacy policy because your use of our product means that you agree to the policy. To help us improve Tempo products and services, we do limited analytics tracking of usage of the products. Examples of data that we collect are the number of Tempo teams that are created and which JIRA version is installed. JIRA administrators can opt your organization out of Tempo analytics tracking (**Administration** cogwheel > **Add-ons** > TEMPO **Tempo Analytics**).

You can also report bugs and request new features in the products by clicking the buttons below. Thank you.

Tempo system plugins

In this chapter

The following Tempo system plugins are bundled with every version of Tempo Timesheets and must be enabled for Timesheets to work. Improvements and fixes within the scope of each system plugin are released on a regular basis. You are not required to wait for a Tempo Timesheets release to upgrade a system plugin. All bundled system plugins can be upgraded by using the Atlassian Universal Plugin Manager (UPM).

Tempo Core

The following permissions are managed in the Tempo Core system plugin:

- Tempo Administrators
- View All Worklogs
- Log Work for Others

Also managed are settings for defining the working week and specifying public holidays.

Tempo Teams

The following permissions are managed in the Tempo Teams system plugin:

- Tempo Team Administrators
- Browse Team

The **Team** custom field is automatically created when Tempo Teams is installed, and it is used to give issues to a team.

As a team lead you can perform the following tasks:

- Associate projects and agile boards that your team is currently working on so that team members can access all team information in the common team space
- View all hours that are logged by your team members in Team Timesheets. (You must also have View All Worklogs permission for the team's projects.)
- View a graph of the amount of time that the team has logged to different account types.
- Define team roles for all members of the team and set a price rate for each role

Tempo Accounts

The following permissions are managed in the Tempo Accounts system plugin:

- Tempo Account Administrators
- Tempo Rate Administrators

The **Accounts** custom field is created when the Tempo Accounts system plugin is installed, and it is used to display data in Tempo Timesheets. Tempo Accounts is used for worklog classification. There are many valuable Tempo Gadgets for Tempo Accounts where you can view the current status of logged time. Price Tables are configured in Tempo Accounts and are used to display valuable revenue and billing data. The Category Type selected for each account is used for the data displayed in the Team utilization report.

Tempo Planning API

The following permission is managed in the Tempo Planning API system plugin: Plan Time permission

The Planning API system plugin is used for managing all plan items that are created in Tempo products. Users with different Tempo products installed can view a plan item regardless of where it is created. Plan items that are exclusive to Tempo Planner (for example, work planned for a sprint) cannot be viewed in Tempo Timesheets.

Tempo Core system plug-in

Extract from **Tempo Core** (plug-in) version: 4.x.x

In this chapter

Tempo Core is a system plugin and a required module for all other Tempo products, such as Tempo Timesheets, Tempo Planner, and Tempo Budgets.

Tempo products are disabled if Tempo Core is disabled in JIRA UPM. Tempo's Workload, Holiday Schemes and some Tempo permissions are handled through Tempo Core.

Hot fixes within the scope of the Tempo System plugins are released on a regular basis so our customers don´t need to wait for a Tempo product release for a fix. An overview of all Tempo system plugins are included in our Getting Help and Support page.

You can update Tempo Core to get the new features, improvements and fixes without updating your Tempo product if your JIRA and Tempo versions are compatible to the new version of Tempo Core.

Tempo Teams system plug-in

Extract from **Tempo Teams** (plug-in) version: 3.x.x

Getting Started

Tempo Teams 101

The following pages explain how to manage teams, but these are also actions that are needed to get started with Tempo Teams.

Manage teams

Creating teams

Team Configuration

Editing team permissions

Program of teams

Other Resources

Glossary

Administer Teams

The JIRA Administrators permission is needed for the following actions, which also need to be configured when getting started.

Granting permission to users

Teams Custom Field

Team roles

Using Tempo Teams

Tempo teams navigator

Browsing a team

Team Reports

Teams JQL Functions

Tempo Accounts system plug-in

Extract from **Tempo Accounts** (plug-in) version: 3.x.x

Getting Started

Tempo Accounts 101

Using Tempo Accounts

Tempo Accounts Navigator

Browsing an Account

Accounts JQL Functions

Displaying Account in JIRA issue

Administer Accounts

Accounts Custom Field

Granting permission to users

Accounts configuration

Other Resources

Tempo Accounts FAQ

Glossary

Tempo Planning API system plug-in

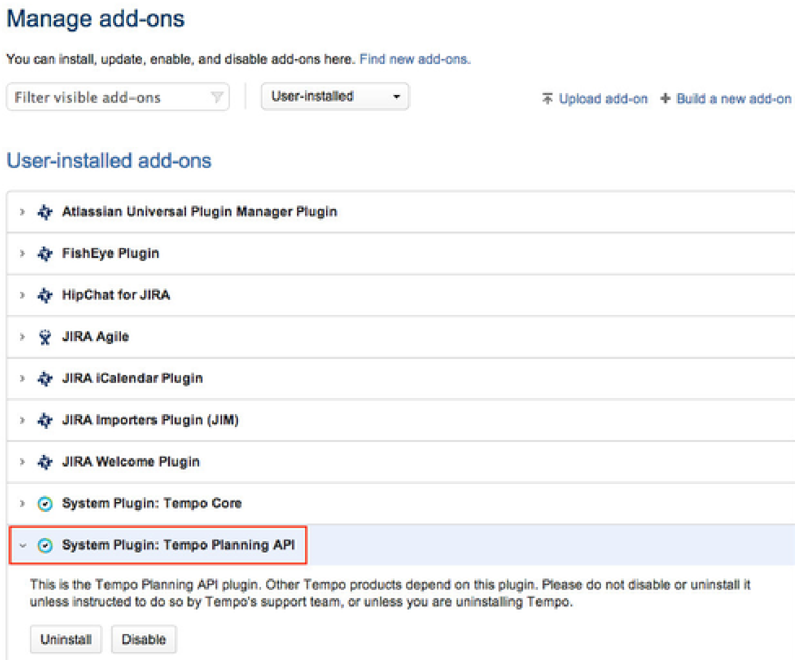
Key items

- Release notes for the Tempo Planning API
- Upgrading the Tempo Planning API
- Shared Planning Data
- Granting permission to users
- REST API guide for the Tempo Planning API

The perspective role: JIRA Administrators

This is the Tempo Planning API plugin. It handles creating, reading, updating and deleting plan items made through other Tempo Products. Tempo Planning API is thus a shared point for Tempo Products to manipulate and share planning data. Disabling or removing it will have consequential effects and should not be done unless instructed to do so by Tempo's support team, or unless you are uninstalling Tempo.

Manage add-ons screen with the Tempo Planning API system plugin (click to enlarge)


Manage add-ons
You can install, update, enable, and disable add-ons here. Find new add-ons.
Filter visible add-ons
User-installed
Upload add-on
Build a new add-on
User-installed add-ons
Atlassian Universal Plugin Manager Plugin
FishEye Plugin
HipChat for JIRA
JIRA Agile
JIRA iCalendar Plugin
JIRA Importers Plugin (JIM)
JIRA Welcome Plugin
System Plugin: Tempo Core
System Plugin: Tempo Planning API
This is the Tempo Planning API plugin. Other Tempo products depend on this plugin. Please do not disable or uninstall it unless instructed to do so by Tempo's support team, or unless you are uninstalling Tempo.
Uninstall
Disable