Installing and upgrading Tempo Timesheets

Installation and Upgrade Guide

Required permission

JIRA Administrators

Procedures and reference information

Release notes for Tempo Timesheets

Latest Tempo Timesheets versions for JIRA 6.4.12 to JIRA 7.3.x

- Tempo Timesheets 8.2 Release Notes
  - Tempo Timesheets 8.2.1 Release Notes
  - Tempo Timesheets 8.2.2 Release Notes
  - Tempo Timesheets 8.2.3 Release Notes
  - Tempo Timesheets 8.2.4 Release Notes
  - Tempo Timesheets 8.2.5 Release Notes

Tempo on JIRA Cloud and Release Change Logs

We deliver new versions of Tempo Timesheets for JIRA Cloud upgrade according to a schedule we have from Atlassian. For every delivery we create a page in our wiki listing all changes since last delivered version. We also create an upgrade request in the Atlassian JIRA project.

The delivered versions are tested by Atlassian against next JIRA Cloud version and upgraded according to Atlassian upgrade schedule.
You can watch the Atlassian What´s New page for all upgrade notes and this page for the table upgrade..

Below you can see the latest Tempo Timesheets delivery on JIRA Cloud.

Timesheets	Cloud Delivery / Release date	Issue	Status	Notes
Tempo Timesheets 7.20.24	**Released on Cloud** on February 14 2017	N/A	RELEASED	Contain migration task only that will run when instance is migrated to the new Cloud
Tempo Timesheets 7.20.18	**Delivered** 8 December 2016 **Released on Cloud** on January 3 2017	ACJIRA-1147 Restricted	RELEASED	Some permission changes are included in this version.
Tempo Timesheets 7.20.15	**Delivered** 2 September 2016 **Released on Cloud** on November 28 2016	ACJIRA-1028 Restricted	RELEASED	New Tempo Timesheets for JIRA Cloud documentation space is now public and will be updated for all new future deliveries.

See Tempo Timesheets Cloud Releases page for all Tempo deliveries to Atlassian for Tempo upgrade requests.

Previous Releases

Expand/Collapse

This is a list of all 'Tempo Release Notes'

You can download the documentation from the Tempo x.x releases as the first online documentation was in Tempo 6.4.

- Tempo Timesheets 8.2 Release Notes
    - Tempo Timesheets 8.2.1 Release Notes
    - Tempo Timesheets 8.2.2 Release Notes
    - Tempo Timesheets 8.2.3 Release Notes
    - Tempo Timesheets 8.2.4 Release Notes
    - Tempo Timesheets 8.2.5 Release Notes
- Tempo Timesheets 8.1 Release Notes
    - Tempo Timesheets 8.1.1 Release Notes
    - Tempo Timesheets 8.1.2 Release Notes
    - Tempo Timesheets 8.1.3 Release Notes
- Tempo Timesheets 8.0 Release Notes
    - Tempo Timesheets 8.0.0.1 Release Notes
    - Tempo Timesheets 8.0.0.2 Release Notes
    - Tempo Timesheets 8.0.1 Release Notes
        - Tempo Timesheets 8.0.1.1 Release Notes
        - Tempo Timesheets 8.0.1.2 Release Notes
        - Tempo Timesheets 8.0.1.3 Release Notes
    - Tempo Timesheets 8.0.2 Release Notes
    - Tempo Timesheets 8.0.3 Release Notes
    - Tempo Timesheets 8.0.4 Release Notes
- Tempo Timesheets 7.16 Release Notes
    - Tempo Timesheets 7.16.1 Release Notes
        - Tempo Timesheets 7.16.1.1 Release Notes
        - Tempo Timesheets 7.16.1.2 Release Notes
    - Tempo Timesheets 7.16.2 Release Notes
    - Tempo Timesheets 7.16.3 Release Notes
    - Tempo Timesheets 7.16.4 Release Notes
    - Tempo Timesheets 7.16.5 Release Notes
- Tempo Timesheets 7.15 Release Notes
- Tempo Timesheets 7.14 Release Notes
    - Tempo Timesheets 7.14.1 Release Notes
        - Tempo Timesheets 7.14.1.1 Release Notes
- Tempo Timesheets 7.13 Release Notes
    - Tempo Timesheets 7.13.1 Release Notes
    - Tempo Timesheets 7.13.2 Release Notes
- Tempo Timesheets 7.12 Release Notes
    - Tempo Timesheets 7.12.1 Release Notes
    - Tempo Timesheets 7.12.2 Release Notes
- Tempo Timesheets 7.11 Release Notes
    - Tempo Timesheets 7.11.0.1 Release Notes
    - Tempo Timesheets 7.11.1 Release Notes
        - Tempo Timesheets 7.11.1.1 Release Notes
    - Tempo Timesheets 7.11.2 Release Notes
        - Tempo Timesheets 7.11.2.1 Release Notes
- Tempo Timesheets 7.10 Release Notes
    - Tempo Timesheets 7.10.0.1 Release Notes
    - Tempo Timesheets 7.10.1 Release Notes
    - Tempo Timesheets 7.10.2 Release Notes
    - Tempo Timesheets 7.10.3 Release Notes
        - Tempo Timesheets 7.10.3.1 Release Notes
- Tempo Timesheets 7.9 Release Notes
    - Tempo Timesheets 7.9.1 Release Notes
        - Tempo Timesheets 7.9.1.1 Release Notes
        - Tempo Timesheets 7.9.1.2 Release Notes
        - Tempo Timesheets 7.9.1.3 Release Notes
    - Tempo Timesheets 7.9.2 Release Notes
- Tempo Timesheets 7.8 Release Notes
    - Tempo Timesheets 7.8.1 Release Notes
        - Tempo Timesheets 7.8.1.1 Release Notes
        - Tempo Timesheets 7.8.1.2 Release Notes
        - Tempo Timesheets 7.8.1.3 Release Notes
    - Tempo Timesheets 7.8.2 Release Notes
    - Tempo Timesheets 7.8.3 Release Notes
- Tempo Timesheets 7.7 Release Notes
    - Tempo 7.7.1 Release Notes
    - Tempo 7.7.2 Release Notes
    - Tempo Timesheets 7.7.1.2 Release Notes
    - Tempo Timesheets 7.7.1.4 Release Notes
- Tempo 7.6 Release Notes
    - Tempo 7.6.1 Release Notes

Setting up Tempo Timesheets

- If an administrator has already set up your Tempo Timesheets, you can skip to videos about using Tempo Timesheets.
- The setup instructions below are for Tempo Timesheets 8.1 and later. You can also view setup instructions for earlier server versions.
- If you need assistance with setting up or using Tempo Timesheets, please log a request with our support team.

The basic setup

Configuring initial settings and permissions

Required permission: JIRA Administrators

1. Activate JIRA time tracking.
2. Configure worklog options.
3. Configure the following settings:
    - The day of the month that timesheet monthly periods begin on
    - The first day of the week
4. Put JIRA users into groups. (See the JIRA documentation.)
5. Grant global and project permissions to users or to groups of users

Configuring the working week and public holidays

Required permission: Tempo Administrators or JIRA Administrators

1. Define a working week.
2. Specify public holidays.

Optional extra setup tasks

Click here to expand...

Setting up teams

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. You can set up teams in Tempo Timesheets so that team leads and other specified users can, for example, view and approve the timesheets of team members or plan time for team members to work on issues.

Configuring initial settings for teams

Required permission: JIRA Administrators

1. Customize team role names.
2. Add the **Team** field to screens.

Creating and configuring individual teams

Required permission: Tempo Team Administrators

1. Create teams.
2. Configure basic team information.
3. Add team members.
4. If JIRA users who are not on the team must be able to view team information, grant those users Browse Team permission.
5. If JIRA users other than the team lead must be able to approve the timesheets of team members, grant those users Approve Timesheet permission. See also the task below about enabling the timesheet approval process.
6. Link teams to projects and boards.

Enabling the timesheet approval process

You can enable the timesheet approval process, whereby team members can submit their timesheets for review once a month or once a week, and team leads or other specified users can approve or reject the timesheets.

Required permission: JIRA Administrators

Configuring the timesheet approval process.

Adding custom fields to worklog forms

You can add custom fields to the form that users fill out when they log work. These custom fields are called *worklog attributes*. Examples of fields are *Overtime, Account*, and *Transport Costs*. You can also view the field content in timesheet reports.

Required permission: JIRA Administrators

Adding custom fields (worklog attributes) to worklogs.

Setting up accounts and accounting options

You can set up Tempo accounts for the following purposes:

- Linking issues to external systems
- Grouping issues from multiple JIRA projects
- Viewing billing or revenue reports
- Keeping track of customers and contact information

You can also configure whether certain users can set billed hours as well as worked hours and whether they can export lists of account worklogs as PDF files.

Configuring initial settings for accounts

Required permission: JIRA Administrators

- Completing the initial setup tasks for Tempo accounts
- Configuring billed hours and PDF options
- Adding an **Account** field to worklog forms. (See 'Adding additional fields to worklog forms' above.)

Creating and configuring individual accounts

Required permission: Tempo Account Administrators

- Creating accounts
- Importing accounts
- Configuring accounts

Configuring time-planning options

By default, team leads and users can do the following tasks:

- Team leads and other users with Plan Time permission can plan time for team members to work on particular projects, versions, components, and issues.
- Users can plan their own time.
- Users can submit approval requests for time that they plan.

You can turn these options on or off.

Required permission: JIRA Administrators

Configuring time-planning options.

Scheduling timesheet closing dates and reminders

Within a timesheet monthly period, you can schedule intermediate (for example, weekly) closing dates after which previous days can no longer be edited. You can also schedule reminders to be sent to users to finish editing their timesheets or to submit their timesheets.

Required permission: JIRA Administrators

Configuring timesheet closing dates and reminders.

Setting up issues for general occurrences, such as vacation, sickness, and staff meetings

You can use *internal issues* for general occurrences that are not related to specific work projects.

Required permission: Tempo Administrators or JIRA Administrators

Configuring internal issues and activities

Setting up Tempo Timesheets gadgets on JIRA dashboards

You can set up several Tempo Timesheets gadgets on JIRA dashboards and Confluence pages and add Tempo Timesheets activities to the JIRA Activity Stream.

Required permission: Some gadgets can be set up by any Tempo Timesheets user. Other gadgets require Approve Timesheets permission.

Adding Tempo Timesheets gadgets.

Getting started with Tempo Timesheets

Users

Please see the Getting Started Videos.

Administrators

- Setting Up Tempo Timesheets server version 8.1.0 and later
- Setting Up Tempo Timesheets server version 8.0.x and earlier

User's guide to Tempo Timesheets

Getting-started videos

Logging work on a calendar

Worklog Calendar

Logging and viewing work on timesheets and on JIRA issues

Timesheets

Worklogs

Viewing the time that is worked in a sprint

Approving, planning, and billing

Submitting and approving timesheets

Planning time to work on projects

Managing revenue and billing

Getting an overview and browsing

Getting a quick overview of time worked on issues

Adding Tempo gadgets to your dashboard

Browsing teams and accounts

- Tempo team navigator
- Browsing a team
- Tempo accounts navigator

Other useful links

- Product overview
- All user and administrator videos
- Use cases
- Webinars
- Frequently asked questions

Timesheets

Tempo Timesheets is a time-tracking and time-planning add-on for JIRA. You can log time that you worked on different JIRA issues and plan time for future work. Your *user timesheet* displays the time that you logged. Depending on the permission that you have, you can also view other types of timesheets, where logged time is grouped by, for example, JIRA project, customer account, or JIRA issue.

In this chapter

Related pages

- Agile Timesheet

Accessing Tempo Timesheets

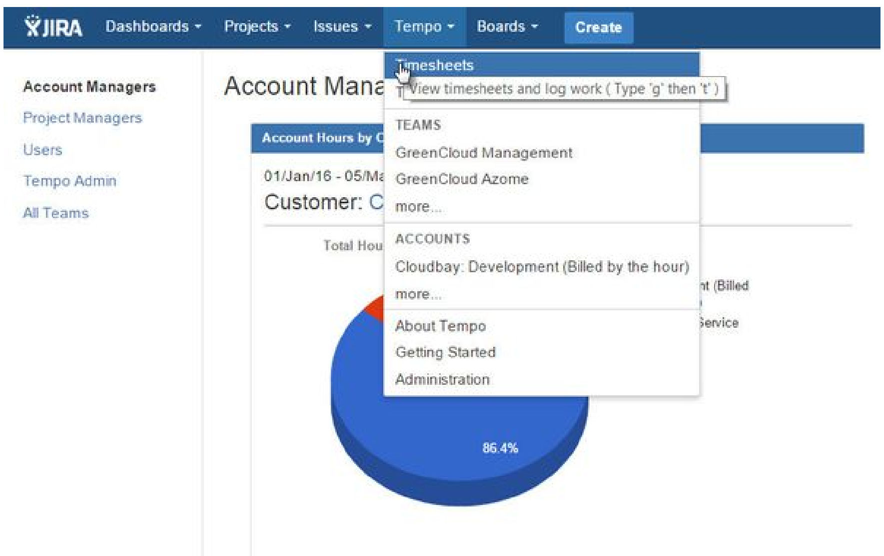
Required permission

- Work On Issues permission for at least one JIRA project.
- Time tracking must be turned ON in JIRA.

Procedure

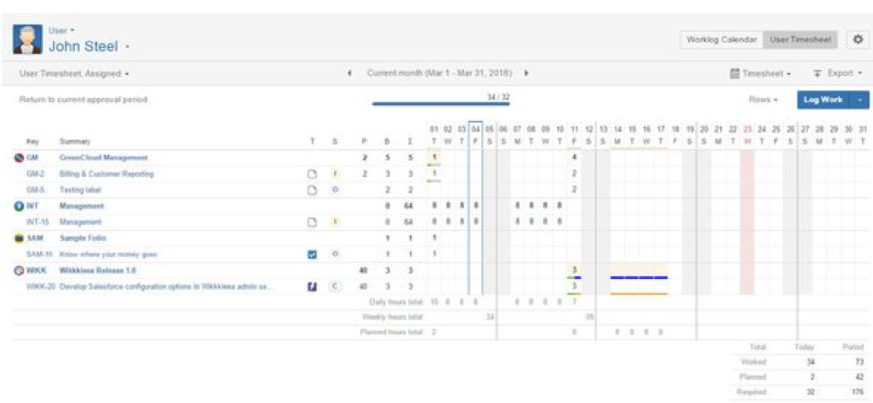
On the main menu bar, click **Tempo** > **Timesheets**.

Accessing Tempo Timesheets (click image to enlarge)



The user timesheet opens.

User timesheet (click image to enlarge)



Column colors

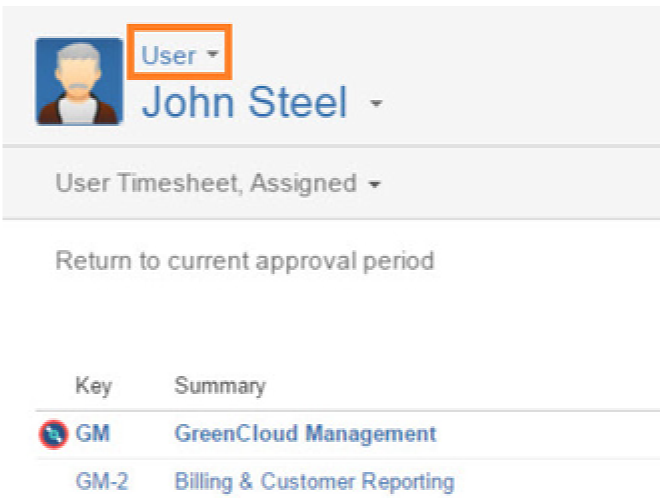
- Gray columns on the timesheet indicate weekends.
- Pink columns indicate other public holidays.
- A blue border surrounds the column for the current day.

Switching among different types of timesheets

You can switch among the following types of timesheets:

- User
- Project
- Team
- Account
- Advanced
- Issue

The type of timesheet that is currently displayed is indicated in the upper-left corner of the timesheet.

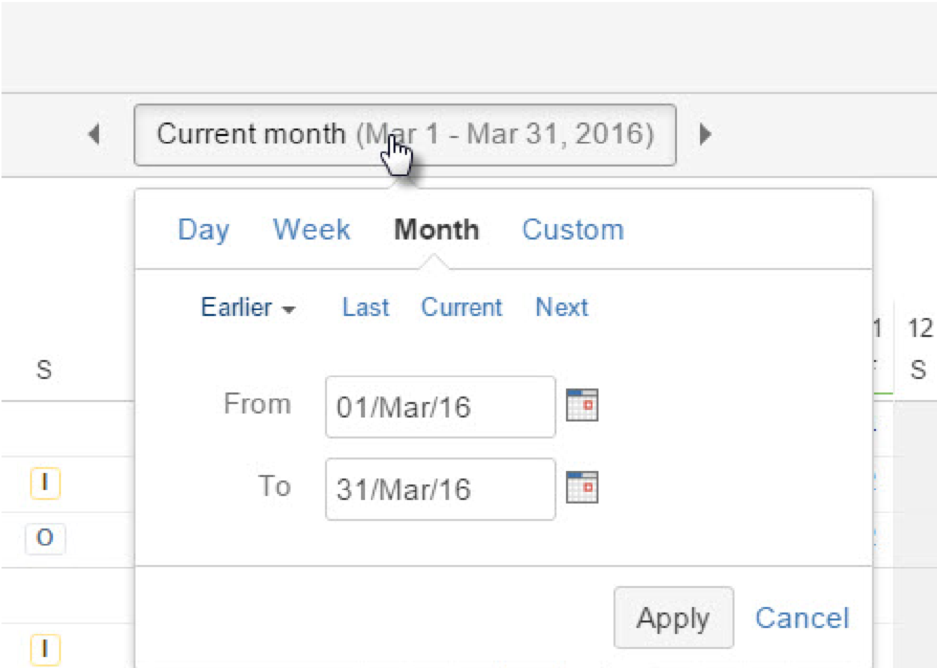


Procedure

To switch to a different type of timesheet, click the small down-arrow, and select a timesheet type from the list.

Displaying different time periods

You can adjust your timesheet view to show a day, week, month, or custom period. You can also switch the display to the previous, current, or next period. Learn more.



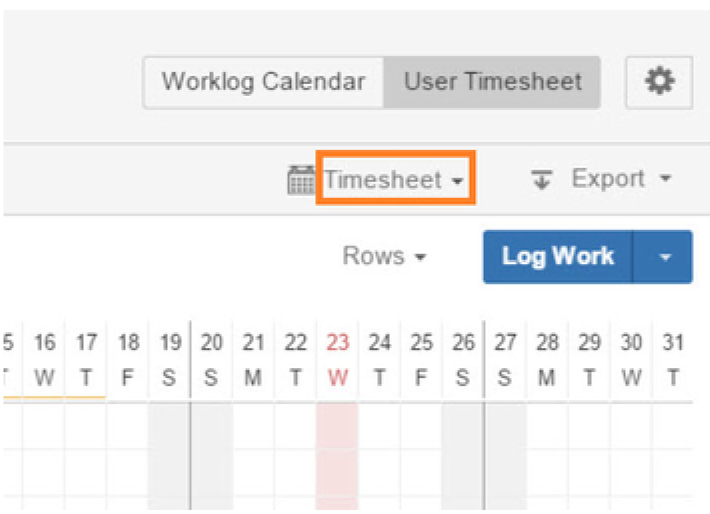
Displaying different views of the timesheet information

As well as selecting different timesheet types, you can select different views:

- Timesheet
- Calendar
- Report
- List

Learn more about different views.

The view that is currently displayed is indicated in the upper-right corner of the timesheet, beside the **Export** button.



Accessing user preferences

You can change the following user preferences:

My Supervisor

The name of your supervisor

Timesheet Actions

Whether you want to be notified by email during timesheet and planning approval processes

Team leads (and other users with Approve Timesheets permission) can also change the following user preferences:

Workload Scheme

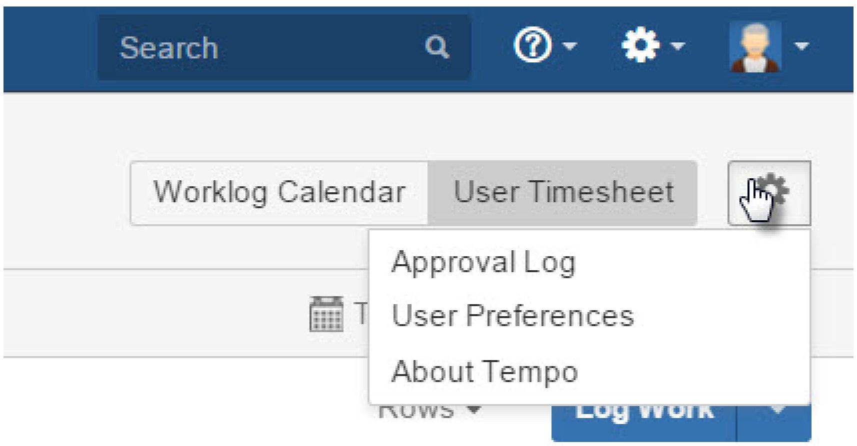
Specifies which days are working days

Holiday Scheme

Specifies which days are public holidays

Procedure

To access user preferences, click the gray cogwheel in the upper-right corner of the timesheet, and select **User Preferences** from the list.



Learn more about user preferences.

Logging time that you worked on an issue

1. In the upper-left corner of any timesheet view, click **Log Work**.
2. In the Log Work window, fill in the requested information, and click **Log Work**.

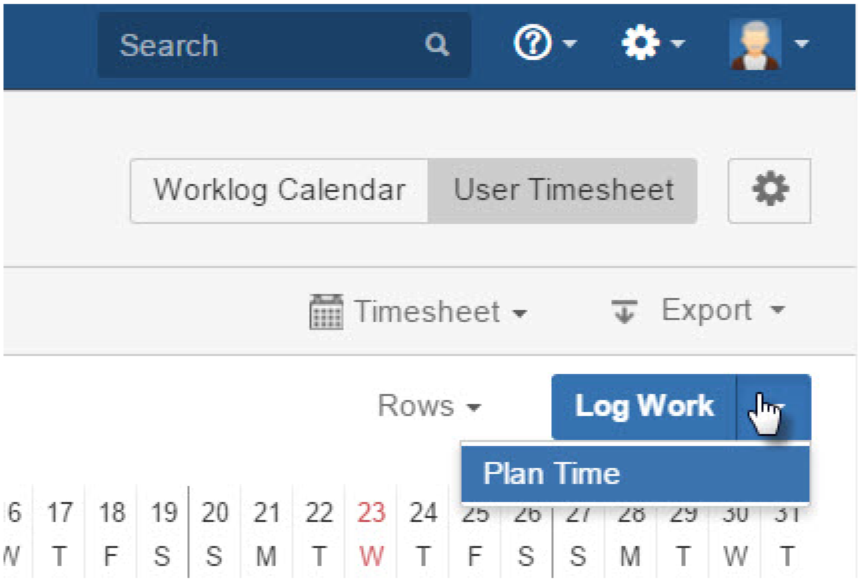
Learn more about logging work.

Planning time to work on an issue

If time planning is enabled, you can plan time to work on issues.

Procedure

1. In the upper-left corner of any timesheet view, click the small down-arrow beside **Log Work**, and then click **Plan Time**.



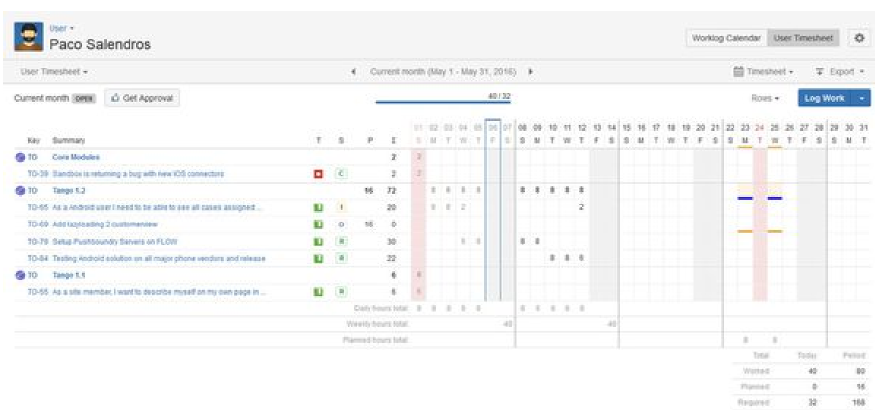
2. In the Plan Time window, fill in the requested information, and click **Plan Time**.

Learn more about time planning.

User timesheet

You can log your own work on your user timesheet. The timesheet gives you an overview of all the work that you logged over a period.

On this page



Accessing your user timesheet

Required permission

- Work On Issues permission for at least one JIRA project.
- Time tracking must be turned ON in JIRA.

Procedures

Accessing from the top menu bar

1. On the top menu bar, click **Tempo** > **Timesheets**.
2. In the upper-right corner, click **User Timesheet**.

Accessing from another type of timesheet

1. In the upper-left corner, click the small text (**Project**, **Team**, **Account**, **Advanced**, or **Issue** , depending on which type of timesheet is displayed).
2. From the list that is displayed, select **User**.

Displaying JIRA issues on your user timesheet

All issues that you logged time on during the period are displayed by default. You can display other issues by selecting a JIRA filter.

Submitting your timesheet for approval

If the timesheet approval process is enabled, team leads and other users with Approve Timesheet permission can approve the timesheets of team members from the team timesheet. The approval status (for example, **APPROVED**, **READY TO SUBMIT**, or **OPEN**) is displayed in the upper-left corner.

To submit your timesheet for approval, click **Get Approval**.

Related topics

- Timesheet approval process

Hiding JIRA projects, versions, and components

JIRA projects, versions, and components are collectively called *activities* in Tempo Timesheets. Activities are displayed by default on your user timesheet. You can hide activities and display only JIRA issues by completing the following steps:

1. In the upper-right corner, click **Rows**.
2. Clear the **Activities** checkbox.

Related topics

- Additional rows and columns

Reading the initial information columns

Symbol	T	S	P	B	
Stands for	Type	Workflow status	Planned hours	Billed hours	Logged hours
Explanation	JIRA Issue type	The workflow status of the JIRA issue.	The total number of planned hours in the row, in the displayed time period.	The total number of billed hours in the row, in the displayed time period.	The total number of logged hours in the row, in the displayed time period.
Note				The Billed column is displayed if one or both of the following conditions are met: • Users with Approve Timesheet permission can set billed hours • Other users can set billed hours **Related topic** Configuring global accounting options	

Reading the 'total' rows

Daily hours total	Refers to logged hours
Weekly hours total	Refers to logged hours
Planned hours total	Refers to daily planned hours

Total	Today	Period
Worked	All logged hours for the displayed period that are before or on today's date	All logged hours for the displayed period
Planned	All planned hours for the displayed period that are before or on today's date	All planned hours for the displayed period
Required	Your required working hours for the displayed period that are before or on today's date	Your required working hours for the displayed period

Viewing the timesheets of other users

As well as being able to view your own timesheet, you might have permission to view the timesheets of other users.

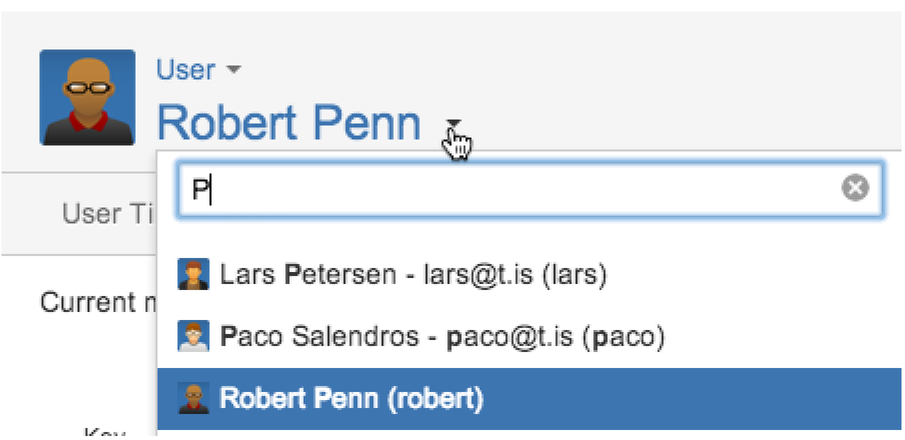
Required permission

- Browse Users permission
- View All Worklogs permission for the projects in which the other users have Work On Issues permission

> **Tip**
> If you also want to log work on behalf of other users, you must have 'Log Work for Others' permission for their projects.

Procedure

1. Open your own user timesheet.
2. In the upper-left corner, click your name.
3. In the search field that is displayed, start typing the name of the team member.
4. When the team member's name is displayed, click the name.



Displaying more issues on the user timesheet

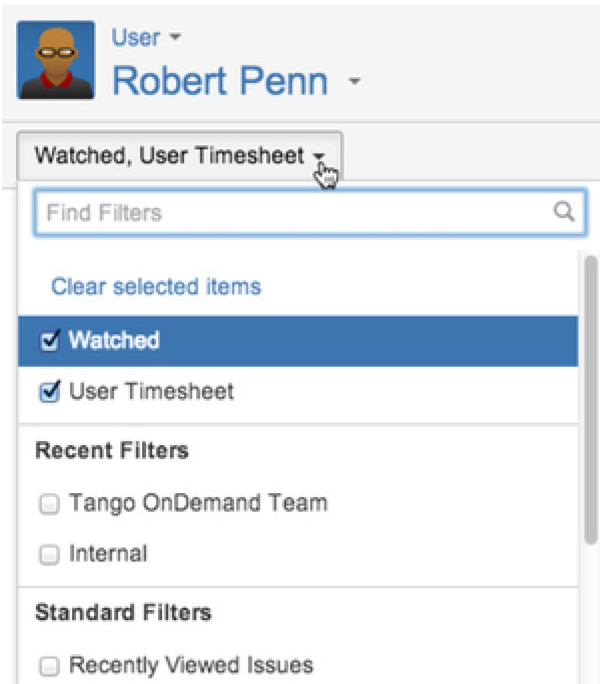
By default, the user timesheet lists issues on which you logged work for the displayed period. You can display other issues on the timesheet by selecting one or more JIRA filters.

Required permission

Browse Projects permission for the project that is associated with the filter.

Procedure

1. In the upper-left corner of the page, under the user's name, click the small text.



2. Do one or both of the following tasks:

   - From the list, select the filters from which you want to display issues on the user timesheet.

     Tips

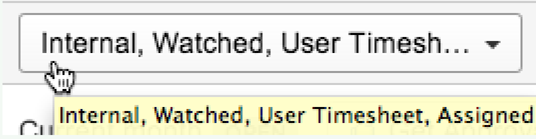
     - The available filters are associated with your JIRA permissions. If you have Approve Timesheet permission and are viewing another team member's user timesheet, your own filters are displayed, not the team member's filters.
     - The **User Timesheet** filter is the default filter, containing issues on which you logged work for the displayed period.

   - At the top of the list, in the **Find Filters** field, search for and select other filters.

   Issues from the selected filters are displayed on the user timesheet.

   Tips

   - Under the user's name, the names of the selected filters are listed on one line. If three dots are displayed at the end of the line, you can see the complete list by hovering over the text.



- The timesheet progress bar is not displayed if the **User Timesheet** filter is not selected.

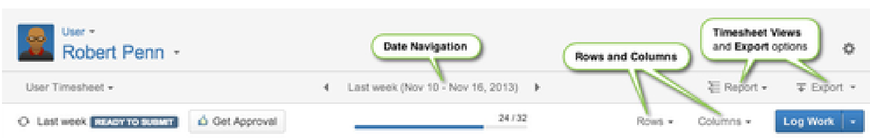
Related topic

Using filters (JIRA documentation page)

Timesheet view options

This is a child page of Timesheets, explaining the different view options available in the Tempo Timesheets header area. This page and it's child pages cover view options for all types of timesheets.

Tempo Timesheets header area (click to enlarge)



Timesheet Views

Each type of timesheet can be viewed in four different ways - see the drop-down menu to the right in the Tempo Timesheets header area. The default view option is simply called **Timesheet**, but timesheets can also be displayed in a **Calendar** view. Two more views are available, one is called **Report** and the other **List**.

Four different timesheet views

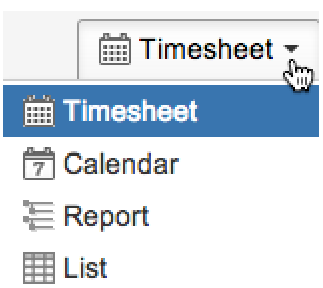
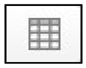


Table: Timesheet views explained

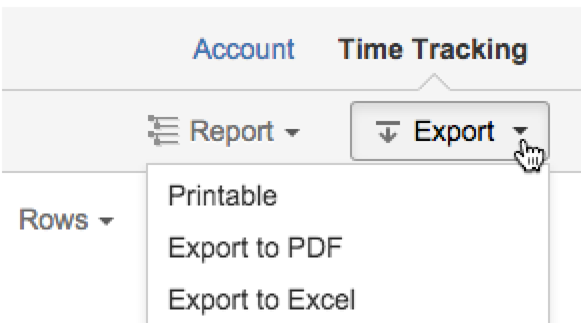
Display option	Denoted Icon	Description
Timesheet		This is the default view of timesheets, which many use to Log Work and to get an overview for a chosen period.

Calendar		The Calendar view is useful to view your planned and scheduled activities. The Calendar View is not available in the Account and Advanced Timesheets.
Report		The report view displays worklogs in association with JIRA Projects, but it is also possible to filter out the worklogs, issues or activities and just view the projects.
List		This view displays one JIRA Issue per line and gives a good overview of worklogs.

Export Options

The Export menu offers a *Printable* view and *Export to Excel* for all timesheets.

Export menu options



Selecting the *Printable* option displays a printer friendly view of the screen, and the browser printer function can then be used to print out.

You may want to select an option in the Rows list before printing out as the default display is by worklogs.

The option Export to PDF allows the user to export account(s) to a PDF file. Clicking the *Export to Excel* option downloads an excel file containing the content of the current screen.

Related topics

- Exporting worklogs as an Excel file
- Exporting account worklogs as a PDF file

Additional rows and columns

This is a child page of Timesheet view options, explaining the **Rows** and **Columns** menus.

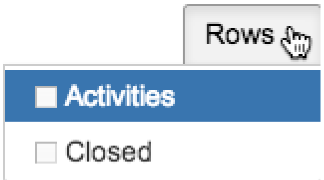
On this page

In this chapter

Rows Menu

The Rows menu is available in the User timesheet and all Timesheet Report Views, where rows can be removed or added.

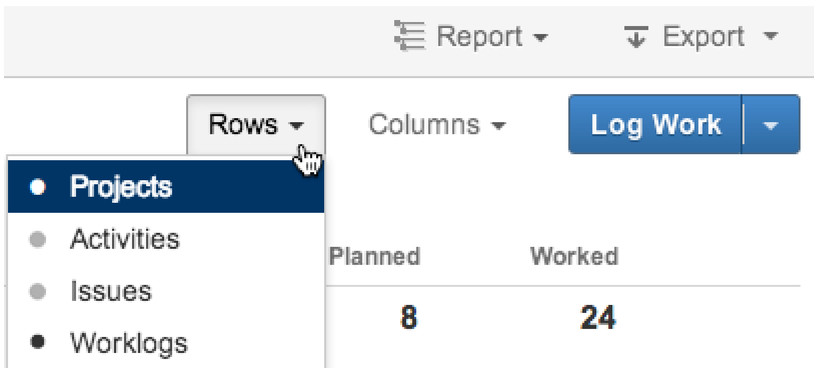
Rows in User Timesheet



Activities are a JIRA Project, Version or Component, which belonging issues are grouped by in the User timesheet, when the option is selected, but it is set by default. With the **Closed** option selected, closed JIRA Issues are displayed in the timesheet.

When Activities is selected, the Closed menu item is not available (this will soon be changed in a future version).

Rows in the User Report View

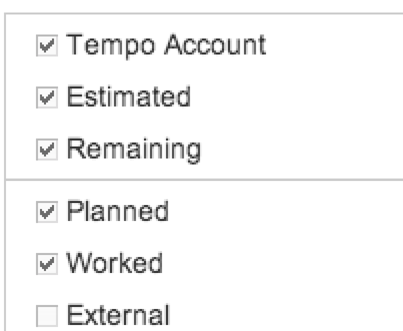


The menu looks the same for all Report views, except the *Team Report View*, where the option **Users** is available, instead of Projects. With the Projects/Users level set, the least granularity information is displayed. As the levels/rows are added, more granularity is added, e.g. Activities, Issues and then the most granularity is reached with Worklogs.

Columns Menu

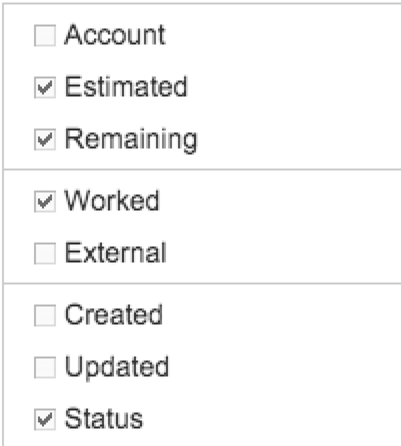
The Columns menu is available in all Report Views and List Views, to remove or add columns as needed. It looks the same in each Report View, except the options *Planned* and *Worked* are not included in the *Account Report View*.

Columns in Report View



The menu similarly looks the same in each List View, except the option *Worked* is not included in the *Account List View*.

Columns in List View



The menu options that are ticked by default, are displayed by default in the Report and List Views. The screenshots above show the default options, but items can be added to the menu if configured by administrators. Some of them are explained below. Each menu has division lines to group items together, based on where they originated from. For example the default List View Columns menu, shows first items from JIRA Issues (*Tempo Account*, *Estimated*, *Remaining*), the next section shows the default work attributes (*Worked*, *External*) and finally worklog details (*Created*, *U pdated* and *Status*).

Note, as explained for the Account item below, if additional work attributes are defined, they are added to the worklog details section in the Columns menu.

Table: The Views menu items explained

Account	Refers to Tempo Accounts - the account may be a custom field in JIRA Issues or set as a wo rk attribute. If set as a work attribute, the item is shown in the work attributes section of the menu.
Estimated	Adds a column for the hours estimation given to an JIRA Issue.
Remaining	Adds a column for the hours remaining for an JIRA Issue.
Planned	Adds a column for planned hours. The option is available when the following check boxes are selected in Tempo Global Configuration: • '**Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets.**' • '**All users can also plan time for themselves in Tempo Timesheets.**'
Worked	Adds a column for worked hours, as when the work was logged.
Billed	Adds a billed hours column, but it is not *display ed* by default. Managed as options in global configuration, need to be set for this menu item to become available.
External	Adds a column for worklogs that have been accepted by an external system and only these worklogs are displayed. This means that when worklogs have been coordinated with the external system, the *Worked* and *External* colu mns display the same value. If there is no external system in use, all worklog rows display the value 0 in this column.

Created	Adds a column displaying the time when the worklog was created.
Updated	Adds a column displaying the time when/if the worklog was updated.
Status	Adds a column for the status of the worlogs, e.g. if they are somehow invalid or not.

Date navigation

In this chapter

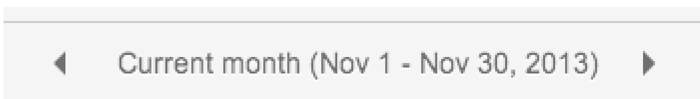
You can adjust your timesheet view to show a day, week, month, or custom period. You can also switch the display to the previous, current, or next period.

Tutorial

(Video without voiceover. Time: 0:44)

Date navigation

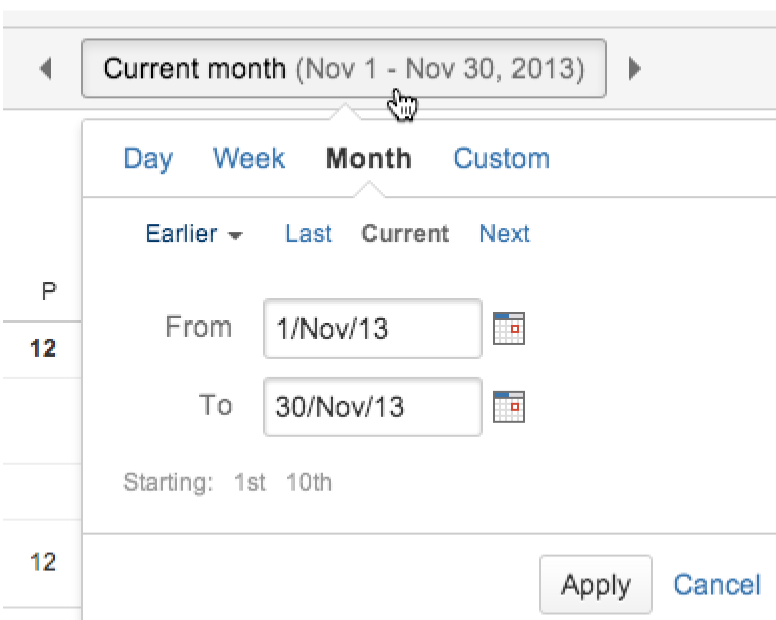
The Date Navigation button



Use the arrows to navigate between the next (right arrow) or the previous (left arrow) Day, Week, Month or Custom period.

Click anywhere on the Date Navigation button (between the arrows), to open the window to adjust what to display.

The Date Navigation window, showing the Current month



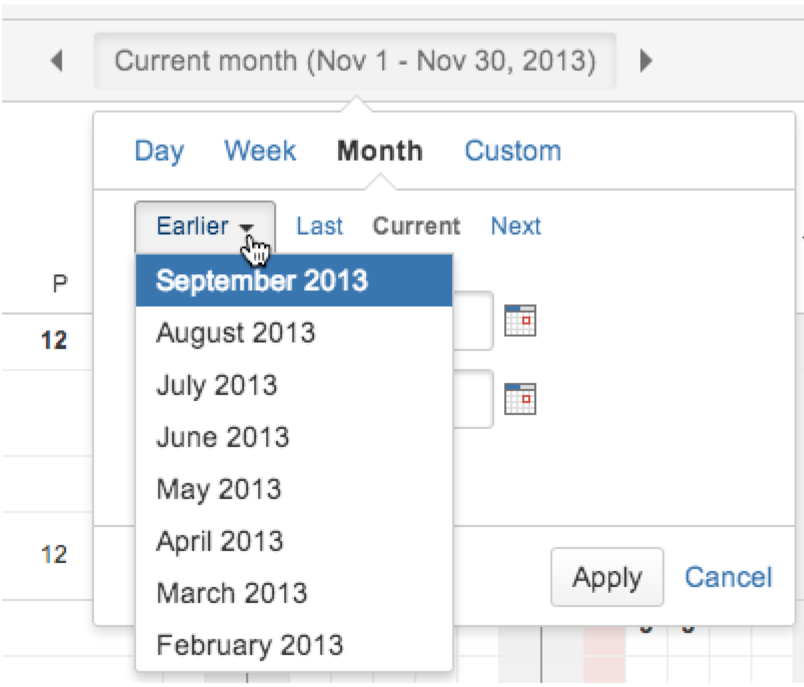
At the top of the window are tabs to change between a Day, Week, Month or a Custom period. Click on the **Apply** button to save changes or the **Cancel** link to close without saving.

Clicking somewhere outside the window closes it. If you do some changes in the window but do not hit the Apply button, the changes persist in the window until the timesheet is refreshed, even though you close the window.

The screenshot above shows the window for a Month and there are links to navigate to the **Last month** and **Next month**. It is possible to edit the dates in the **From** and **To** date fields, either by typing into the fields or clicking the calendar button to the right of each field. The screenshot below shows a drop-down to the left, with eight months previous to to the Last month at any given time.

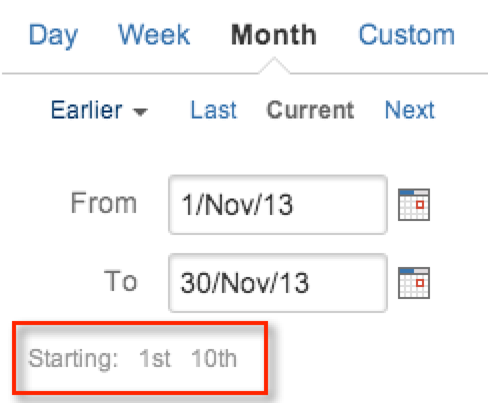
If the dates are changed such that they don't match a Month (Period), then the window sends the user into the Custom tab.

The Date Navigation window, showing eight months earlier than the Last month



In the screenshot below, two different start dates are shown for the month, since the 2nd period ha s been configured for this setup.

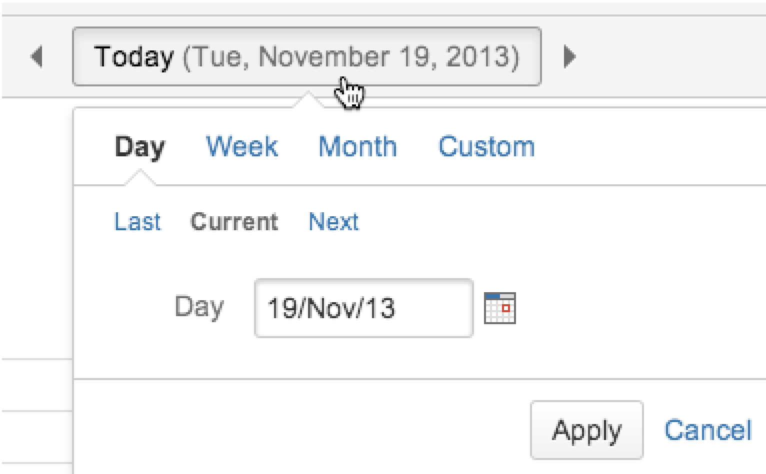
Current month with 2nd period shown



The 2nd period can only be defined for the Month view and therefore the **Starting:** line is only shown at the bottom of the window for this option. If the default and 2nd periods start on a day different from the 1st of the month, three dates will be shown on this line.

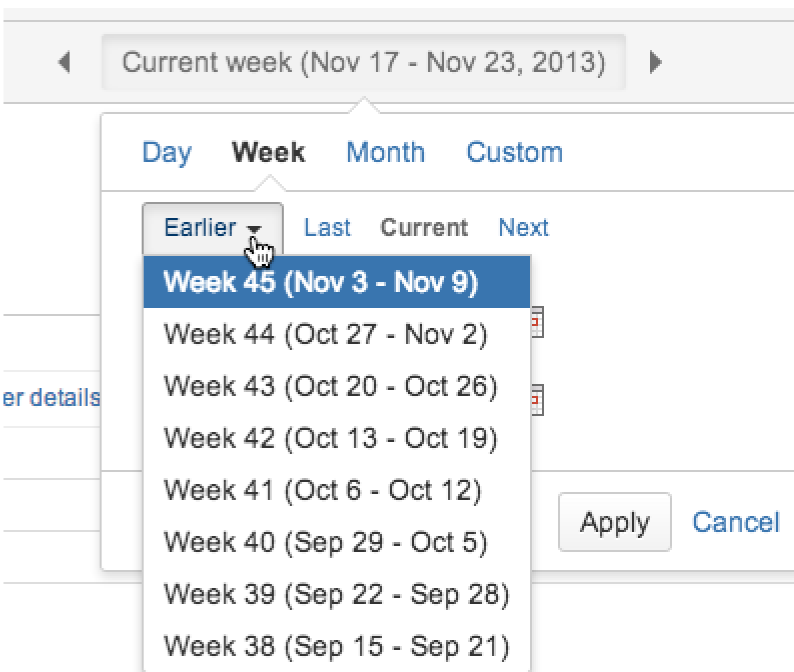
The screenshots below shows the window when the Day, Week or the Custom options are selected.

The Date Navigation window, showing current date



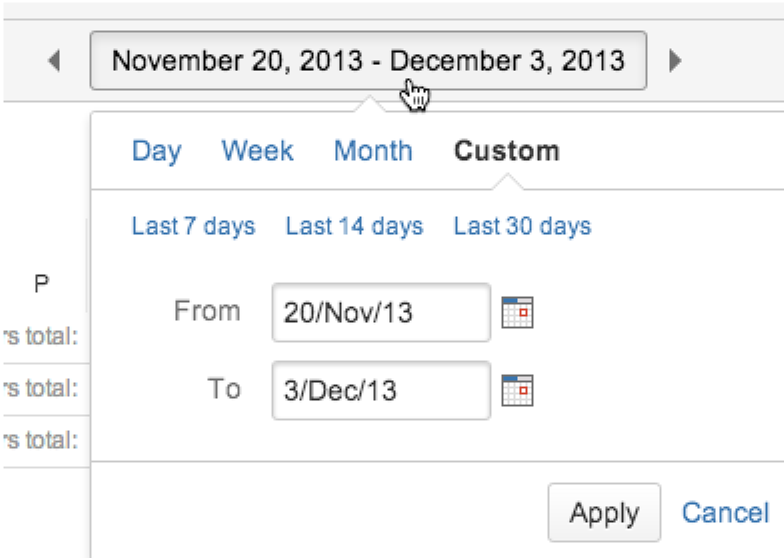
Similar to the Month option, there are links to navigate to **Yesterday** or **Tomorrow** and only one date field **Day** is shown.

The Date Navigation window, showing a Week or Current week



Note that it is possible to navigate with links to the **Last week** and **Next week**, but a drop-down is also available for the eight weeks previous to to the Last week at any given time.

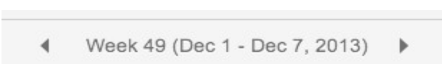
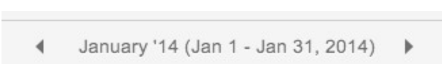
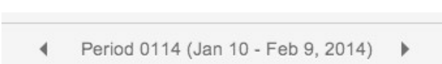
The Date Navigation window, showing a Custom period



Note the navigation links for the **Last 7 days**, **Last 14 days** and **Last 30 days**. Dates can be selected in the **From** and **To** fields as in other tabs. The Custom period chosen becomes the date range for the Date Navigation arrows to jump to, either back or forward in time.

The max date range for Timesheet view is 62 days (2 months) for performance reasons but it is unlimited in Report view.

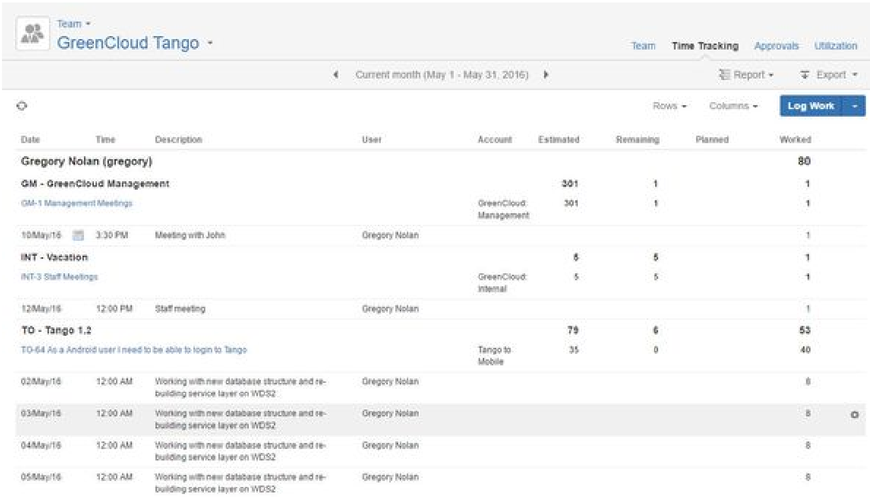
Table: Sample Date Navigation images outside the current option

Date Navigation sample image	Comment
	When the day to view is not Yesterday, Today or Tomorrow, the weekday is displayed in front of the date.
	If the week in not Last week, Current week or Next week, the week number in the year is shown in front of the date range.
	If the month is not Last month, Current month or Next month, the month name and year is shown in front of the date range.
	If a 2nd period is configured and the month starts on a date different than the 1st, the date range is referred to as period.
	The 2nd period is configured and the view is not Last, Current or Next period, the view simply shows Period with the number of the month the date starts in plus the year.

Viewing timesheet in report view

Tempo timesheets can be viewed in report view to provide users and project managers with a quick overview of the worklogs status for the selected period. The sum of all work is displayed at the bottom of the report, grouped by user.

A team timesheet, as displayed in report view (click to enlarge)



On this page

In this chapter

Tutorial

Flexible reporting

Accessing the team timesheet report view

Required permission

- Browse Team permission for the team
- Browse Project permission for the team's projects
- View All Worklogs permission for the team's projects so that you can view worklogs of team members in the report

Procedure

1. On the main menu bar, click **Tempo** > **Timesheets**.
2. On your user timesheet, in the upper-left corner, click **User** > **Team**.
3. On the team timesheet, in the upper-right corner select **Timesheet** > **Report**.

Related topics

- Timesheet view options
- Additional rows and columns

Reading the initial information columns

By default the following columns are displayed in the list view. You can add and remove columns by clicking **Columns** in the upper-right corner.

Header	Stands for	Note
Date	Date of work	
Time	Time of work	Displayed only if the following setting is enabled: 'Users can specify a start time when they log work'
Description	Worklog description	
User	Owner of worklog	

Acco unt	Tempo account	
Estim ated	Original estimate from the JIRA issue	
Rema ining	Remaining estimate from the JIRA issue	The remaining estimate value when list view is displayed
Plann ed	Planned hours	The total number of planned hours is displayed in bold text.
Work ed	Worked hours	The total number of worked hours is displayed in bold text.

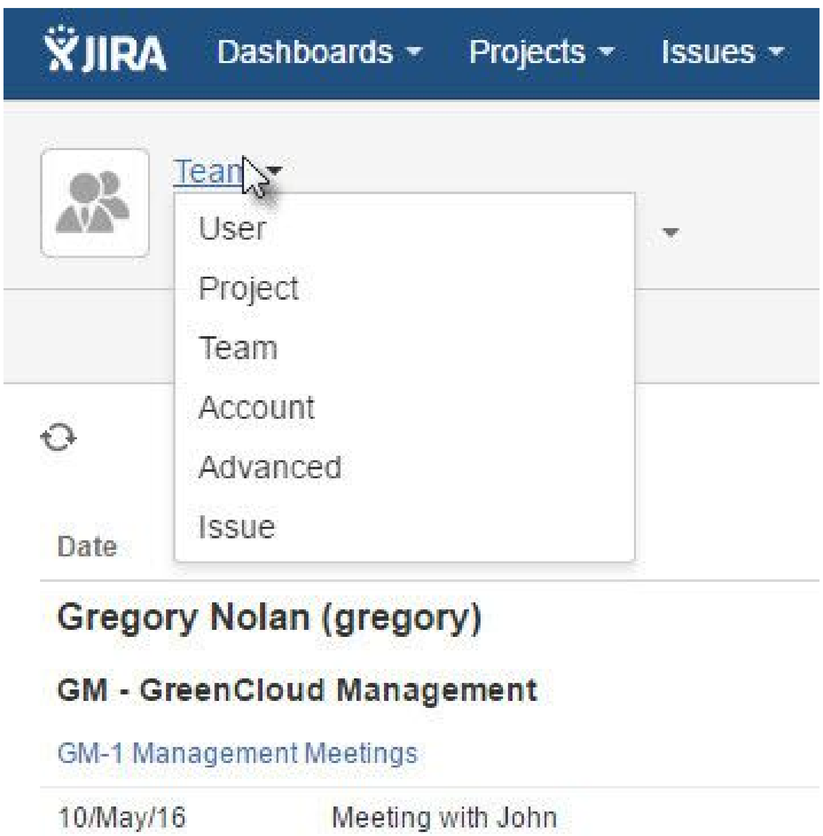
You can edit worklogs in the report view if the selected period is open for edit.

Related topics

- Editing a work log entry

Viewing the report view of a different timesheet

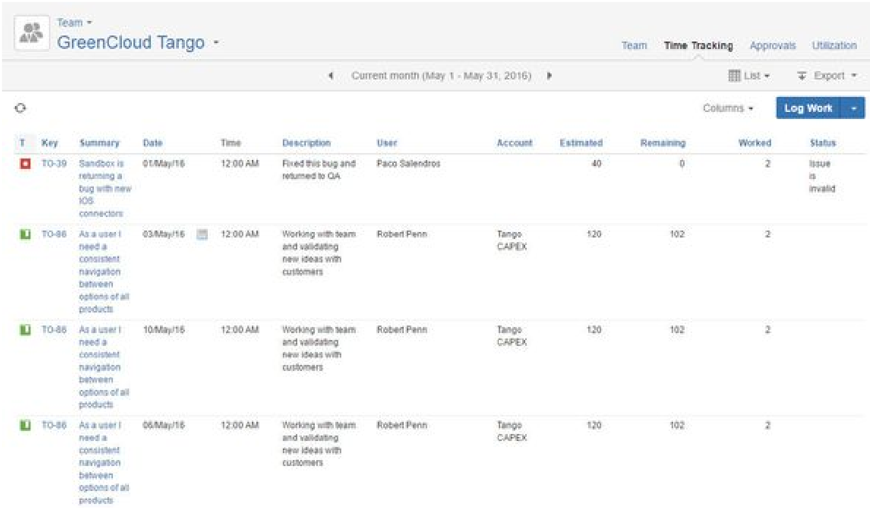
1. In the upper-left corner of the team timesheet, click **Team**.
2. From the list, select the timesheet that you want to view.



Viewing timesheet in list view

Tempo timesheets can be viewed in list view, providing users and project managers with a quick overview of the worklogs status for the selected period. The sum of all work is displayed at the bottom of the view, grouped by user.

A team timesheet, as displayed in list view (click to enlarge)



On this page

In this chapter

Accessing the team timesheet list view

Required permission

- Browse Team permission for the team
- Browse Project permission for the team's projects
- View All Worklogs permission for the team's projects so that you can view worklogs of team members in the report

Procedure

1. On the main menu bar, click **Tempo** > **Timesheets**.
2. On your user timesheet, in the upper-left corner, click **User** > **Team**.
3. On the team timesheet, in the upper-right corner select **Timesheet** > **List**.

Related topics

- Timesheet view options
- Additional rows and columns

Reading the initial information columns

By default, the following columns are displayed in the list view. You can add and remove columns by clicking **Columns** in the upper-right corner. All columns can be sorted by clicking the column header.

Header	Stands for	Note
T	JIRA issue type	Issue icon is displayed
Key	JIRA issue key	Active link to the JIRA issue view
Summary	JIRA issue summary	Active link to the JIRA issue view
Date	Date of work	
Time	Time of work	Displayed only if the following setting is enabled: 'Users can specify a start time when they log work'
Description	Worklog description	
User	Owner of worklog	

Account	Tempo account	
Estimated	Original estimate from the JIRA issue	
Remaining	Remaining estimate from the JIRA issue	The remaining estimate value when list view is viewed
Worked	Worked hours	
Status	Status showing whether the worklog is valid	Message displayed if worklog is invalid or from another system if Tempo Timesheet is integrated with an external system.

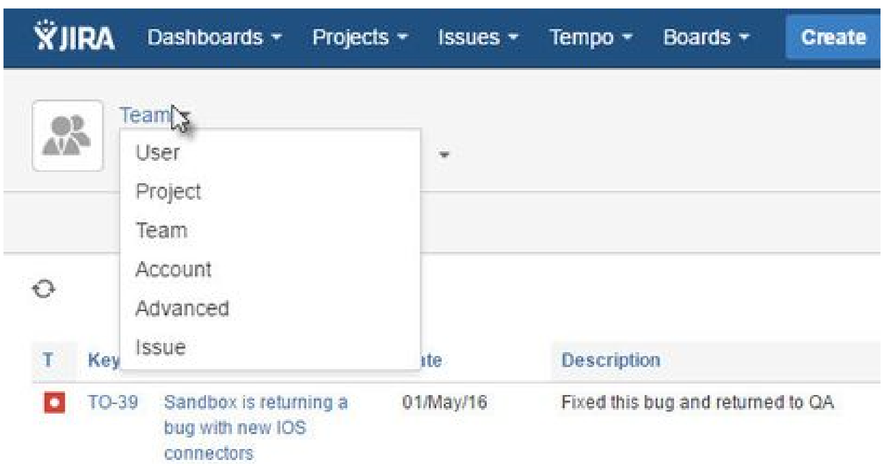
Worklogs can be edited in the list view if the selected period is open for edit.

Related topics

- Editing a work log entry

Viewing the list view of a different timesheet

1. In the upper-left corner of the team timesheet, click **Team**.
2. From the list, select the timesheet that you want to view.



Invalid worklogs

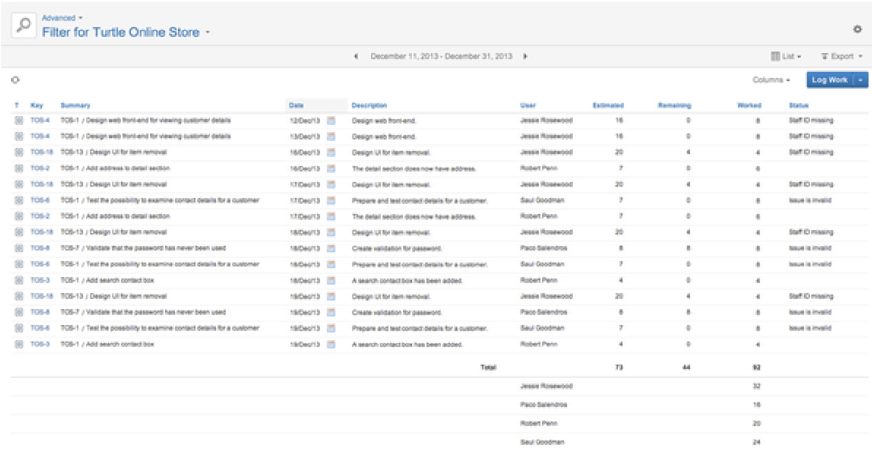
This page explains the various reasons why a worklog is invalid. The **Status** column in any list view shows if the worklogs are invalid and for which reasons. The Advanced Timesheet and any of its views, have a standard **Invalid Worklogs** filter available.

Issues with invalid worklogs are displayed with an *Invalid Worklogs* label, at the end of the issue line in timesheets. This accounts for the User, Advanced and the Issue Timesheet (if Include sub-tasks is ticked).

The List View showing Invalid Worklogs reasons in the Status column

On this page

In this chapter

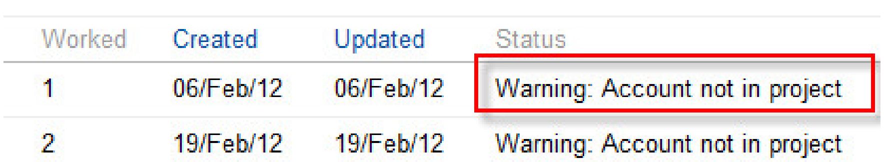


The table below explains reasons why a worklog can become invalid.

Status	Description
Issue is Invalid	This message is displayed if a required field is missing, according to the set **Expression** on the Fields screen. • For example if the Expression has been set to the value **fixVersions**, the JIRA Issue *Fix Versions/s* field has become required. • Another example is, if the Accounts Custom Field is included in the Expression.
Staff ID missing	If the user does not have a **Staff ID** user property set, the message **Staff ID missing** is displayed. • This results from a mismatch between JIRA's User Property settings and Tempo Fields settings. • For example if the *Staff ID User Property* is configured to *SSN*, but lacking in the JIRA's User Property settings for a user, the *Staff ID missing* message is displayed on worklogs entries for this user.
External message	The last type of message in the Status column is if Tempo data is synced with an external system. The message is either OK or some error message from the external system.

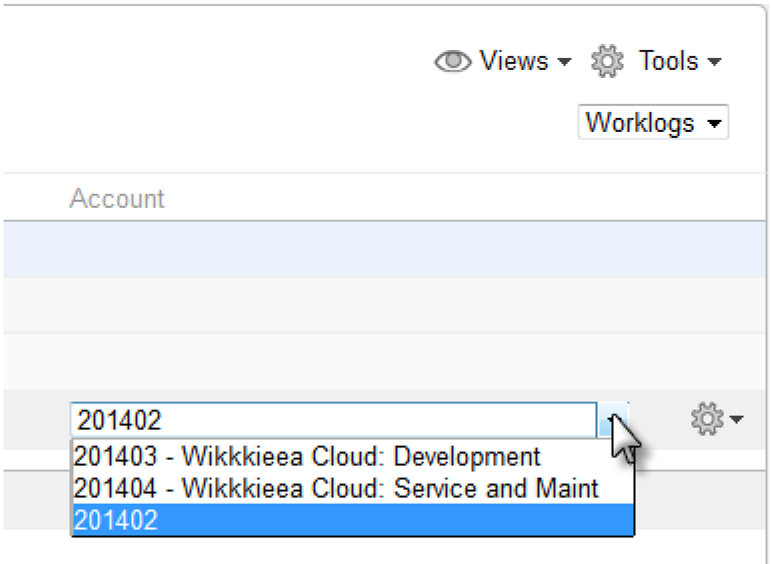
Correcting an account mismatch

Worklogs might contain an **Account** field, through which the worklogs can be directly linked to an account. When you move or split a worklog, you might cause the worklog to be associated with an issue in a project that is not linked to the worklog's account. In such a case, where worklog account and project account do not match, the worklog is listed on the invalid worklogs page.



Worked	Created	Updated	Status
1	06/Feb/12	06/Feb/12	Warning: Account not in project
2	19/Feb/12	19/Feb/12	Warning: Account not in project

You can make the worklog valid by linking the project to the same account or by editing the worklog in any report.



In reports, you can identify invalid worklogs, which are listed with an account key but without an account name.

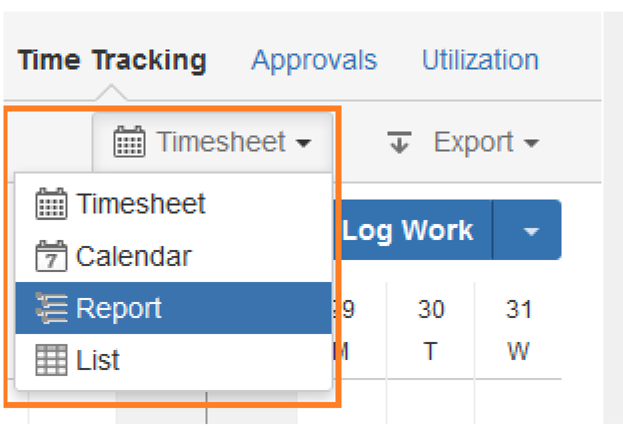
Exporting worklogs as an Excel file

You can export worklogs that are related to a user, team, project, account, filter, or issue over a selected period, as a Microsoft® Excel® file.

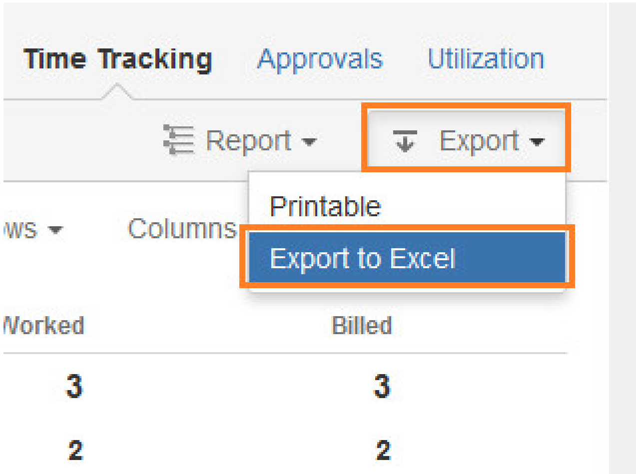
Procedure

To export worklogs as an Excel file, complete the following steps:

1. Go to the timesheet that you want to export worklogs from.
2. **Optional**: You can open the timesheet view, report view, or list view. These three views have the same option for exporting worklogs as the same Excel file. The calendar view does not have this option.



3. Above the timesheet, in the center, select the period that you want to export worklogs for.
4. In the upper-right corner, click **Export** > **Export to Excel**.



5. Open or save the Excel (.xls) file.

Exporting account worklogs as a PDF file

You can export a list of all worklogs for an account over a selected period as a PDF file.

In this chapter

> **Note**
> Worklogs for global accounts are not exported.

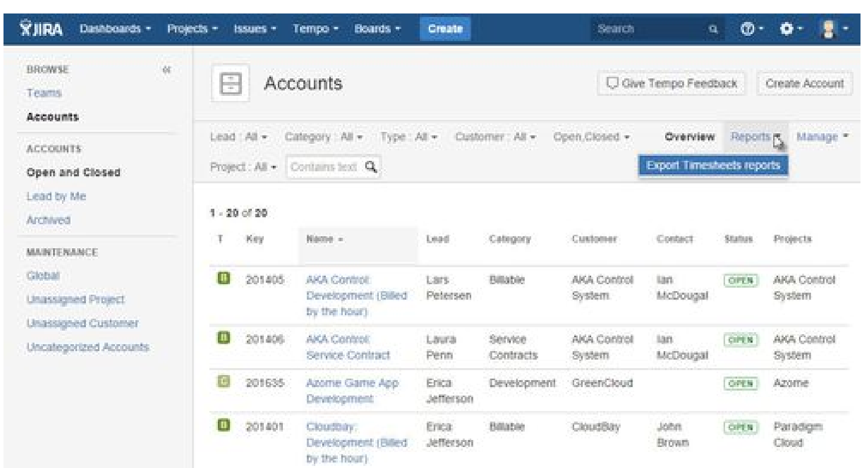
Before you begin

- You must have Approve Timesheet permission.
- If you want to include billed hours instead of worked hours on the list of worklogs, the following setting must be selected in Tempo administration: Export billed hours.

Procedure

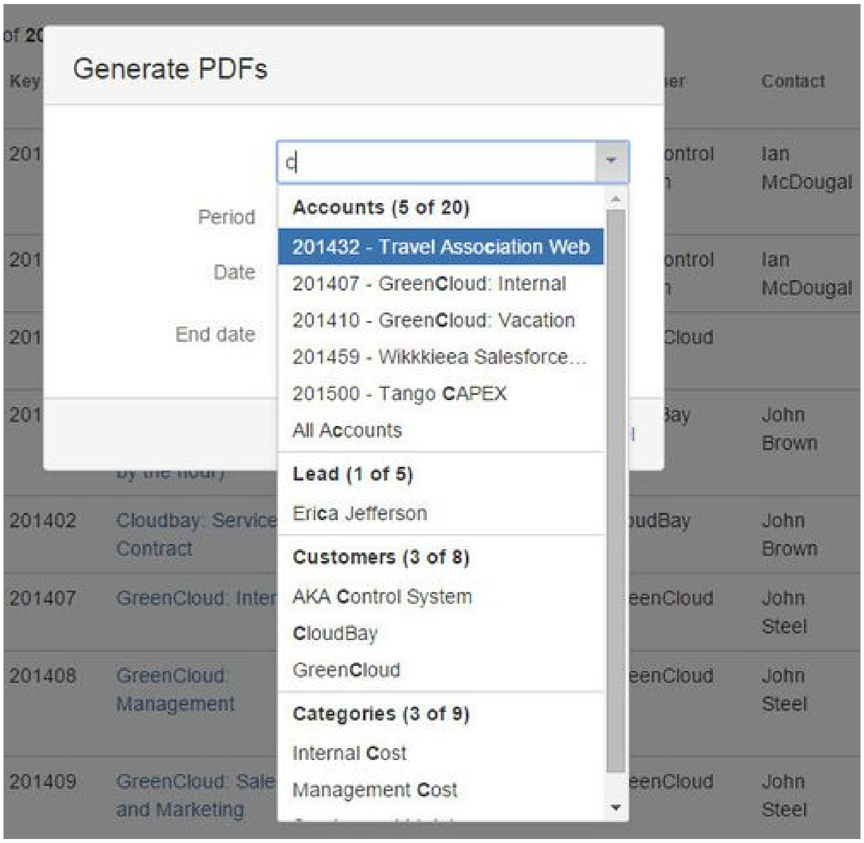
To export an account worklog list as a PDF file, complete the following steps:

1. Go to the Accounts page (**Tempo** > ACCOUNTS **more**).
2. Click **Reports** > **Export Timesheets reports**.



3. In the first field of the **Generate PDFs** window, select one of the following options:

- All Accounts
- The name of one account that you want to export
- An account lead, customer, or category for which you want to export all associated accounts



4. If the 'Generate PDFs' window contains an **Export** field, select whether you want billed hours or worked hours to be listed in the PDF file.

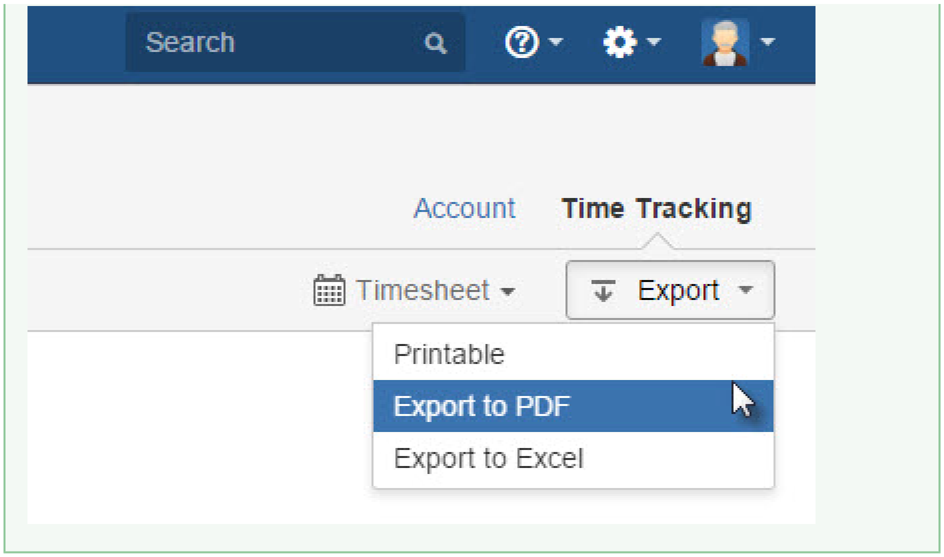
5. Select the period for which you want to export worklogs, or specify the start and end dates of a custom period.

6. Click **Generate**.

   The following files are generated:

   - If your selection contains only one account, a PDF file is generated.
   - If your selection contains more than one account, a .zip file is generated. The .zip file contains the following files:
     - A PDF file for each account that has worklogs for the period
     - A single .txt file that lists accounts that do not have worklogs for the period

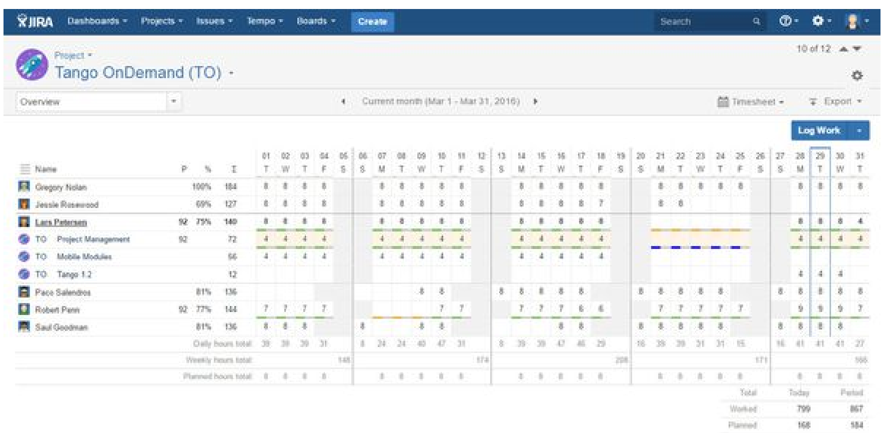
Tip
Alternatively, you can access the export feature from within an account timesheet (**Tempo** > ACCOUNTS **more** > *name of account* > **Time Tracking** > **Export** > **Export to PDF**).



Project Timesheet

The project timesheet provides users and project managers with a quick overview of the time that is logged to, and planned for, a JIRA project. You get a snapshot of a project's progress and can view the capacity of each user.

A project timesheet, as displayed for a Tempo project manager



Accessing the project timesheet

Required ***permission***

- Browse Project permission
- View All Worklogs permission for the project so that you can view worklogs of other users on the timesheet

Procedure

1. On the main menu bar, click **Tempo** > **Timesheets**.
2. On your user timesheet, in the upper-left corner, click **User** > **Project**.

Displaying information about a version or component

You can adjust the project timesheet to display information about one version or one component of the project.

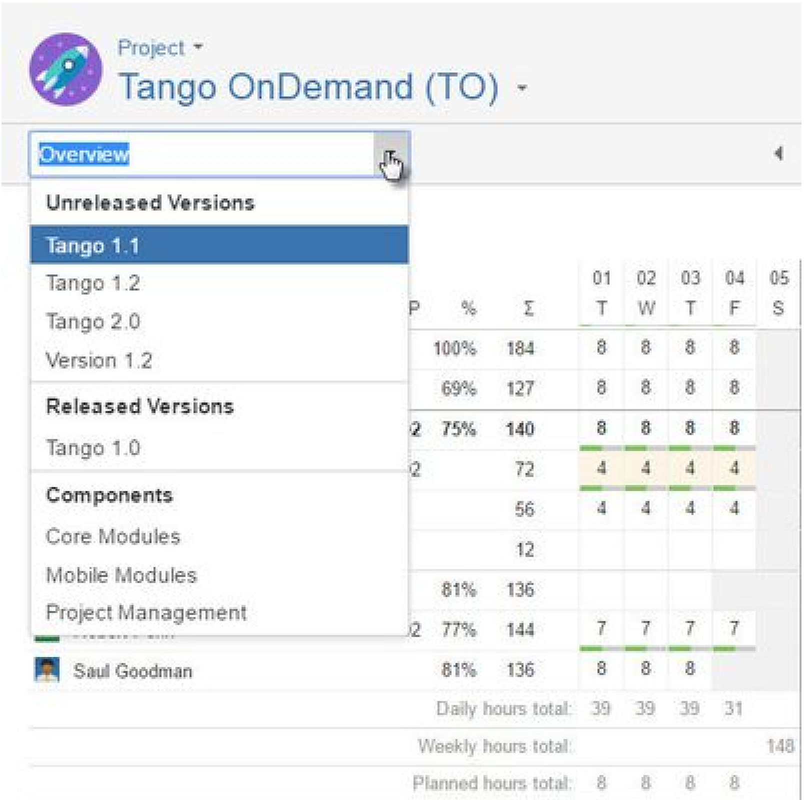
On this page

In this chapter

__Procedure__

1. On the project timesheet, in the upper-left white box, click the small down-arrow.
2. Select the version or the component that you want to display.

Figure. Selecting a version



Expanding a user's information

By default, the project timesheet displays one row for each user who logged work to the project. You can expand the information of a user to view the logged or planned time by version or component.

__Procedure__

To expand the information of a user, click the user's name.

> **Tip**
>
> You can expand the information for all users by clicking the Expand icon above the list of users.

Reading the initial information columns

Symbol	P	%	B	
Stands for	Planned hours	Percentage of working hours logged	Billed hours	Logged hours

Explanation	The total number of planned hours in the row, in the displayed time period.	The percentage of the user's required working hours that are logged in the project, for the displayed time period.	The total number of billed hours in the row, in the displayed time period.	The total number of logged hours in the row, in the displayed time period.
Note			The 'Billed hours' column is displayed if one or both of the following conditions are met: • Users with Approve Timesheet permission can set billed hours • Other users can set billed hours **Related topic** Configuring global accounting options	

Reading the 'total' rows

Daily hours total	Refers to logged hours
Weekly hours total	Refers to logged hours
Planned hours total	Refers to daily planned hours

Total	Today	Period
Worked	All logged hours for the displayed period that are before or on today's date	All logged hours for the displayed period
Planned	All planned hours for the displayed period that are before or on today's date	All planned hours for the displayed period
Required	The team's required working hours for the displayed period that are before or on today's date	The team's required working hours for the displayed period

Planning time for team members

The project timesheet shows logged time. If the following time-planning option is selected in Tempo global configuration, the timesheet also shows planned time: 'Users with Approve Timesheets permission can plan time.'

Planned time is indicated by colored bars in the timesheet cells.

Related topics

- Configuring time-planning options
- Timesheet cell planning

Viewing a team member's timesheet

Users with Approve Timesheet permission can view the timesheets of team members. To view the timesheet of a team member, complete the following steps:

1. Hover over the team member's row. A cogwheel icon is displayed beside the sigma () column.
2. Click the cogwheel, and select **View Timesheet** from the list.

Switching between projects

Required permission

Browse Project permission for the projects

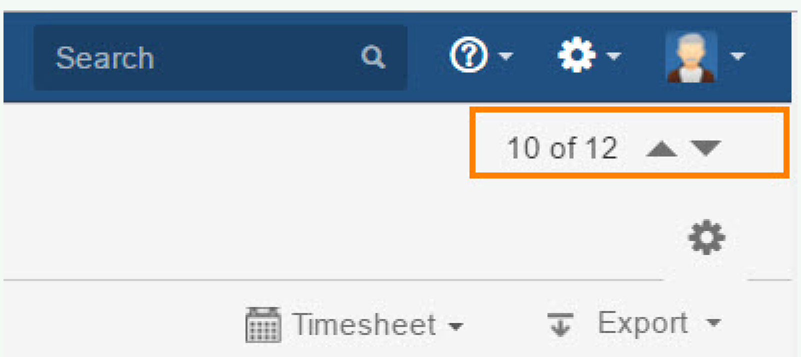
Procedure

To display the timesheet of a different project, complete the following steps:

1. On the displayed project timesheet, on the second menu bar from the top, click the name of the displayed project.
2. From the list of projects, select the name of the project or search for the the project that you want to display.

Tip
Alternatively, you can switch between projects by completing the following steps:

1. On the displayed project timesheet, in the upper-left white box, ensure that **Overview** is selected.
2. In the upper-right corner, click the small up-arrow or down-arrow, as indicated in the following screenshot:



If you select a version or component instead of **Overview**, the small arrows in the upper-right corner switch among versions or components instead of among projects.

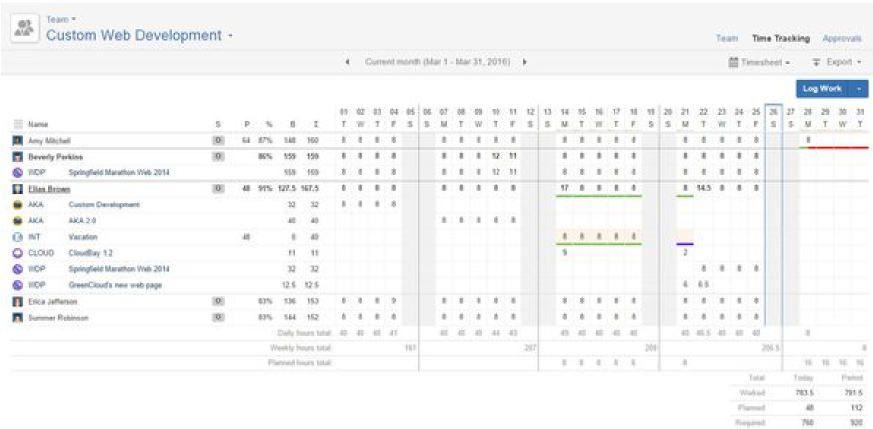
Shortcut keys: **j** = down-arrow. **k** = up-arrow.

Team Timesheet

The team timesheet provides team leads and project managers with a quick overview of the time that is logged by and planned for team members on different projects. On the team timesheet, team leads and other users with Approve Timesheets permission can approve timesheets for team members. Team leads and other users with Plan Time permission can plan time for team members.

Team timesheet, with the list of projects expanded for two team members (click to enlarge)

On this page



Accessing the team timesheet

Required permission

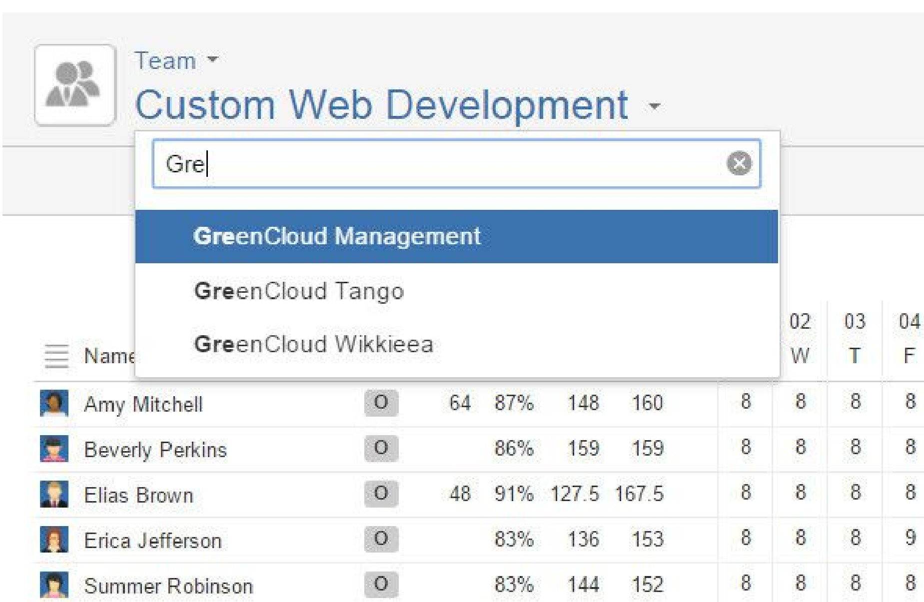
- Browse Team permission for the team
- Browse Project permission for the team's projects
- View All Worklogs permission for the team's projects so that you can view the worklogs of team members on the timesheet
- Plan Time permission for the team so that you can plan time for team members on the timesheet. The following check box must also be selected in Global Configuration: '**Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets.**'

Procedure

1. On the top menu bar, click **Tempo** > **Timesheets**.
2. In the upper-right corner, click **User Timesheet**.
3. In the upper-left corner, click **User** > **Team**.

Viewing the timesheet of a different team

1. In the upper-left corner of the team timesheet, click the name of the currently displayed team. (In the below example, the name of the team is 'Custom Web Development.')
2. From the list, select the name of the team that you want to view.



Expanding a team member's information

By default, the team timesheet displays one row for each team member. If the row contains logged time or planned time, you can expand the information of the team member to view the logged or planned time that corresponds to different JIRA projects, versions, or components.

To expand the information of a team member, click the team member's name.

> **Tip**
>
> You can expand the information for all team members by clicking the Expand icon above the list of team members.

Reading the initial information columns

Symbol	S	P	%	B	
Stands for	Approval status	Planned hours	Percentage of working hours logged	Billed hours	Logged hours
Explanation	The approval status of the user timesheet.	The total number of planned hours in the row, in the displayed time period.	The percentage of the team member's required working hours that are logged, for the displayed time period.	The total number of billed hours in the row, in the displayed time period.	The total number of logged hours in the row, in the displayed time period.
Note	The approval status column is displayed if both of the following conditions are met: • 'Enable timesheet approval process' is set to **Weekly** or **Monthly**. • The displayed time period matches the timesheet approval period (**Week** or **Month**). **Related topic** Enabling the timesheet approval process			The 'Billed hours' column is displayed if one or both of the following conditions are met: • Users with Approve Timesheet permission can set billed hours • Other users can set billed hours **Related topic** Configuring global accounting options	

Reading the 'total' rows

Daily hours total	Refers to logged hours
Weekly hours total	Refers to logged hours
Planned hours total	Refers to daily planned hours

Total	**Today**	**Period**
Worked	All logged hours for the displayed period that are before or on today's date	All logged hours for the displayed period
Planned	All planned hours for the displayed period that are before or on today's date	All planned hours for the displayed period
Required	The team's required working hours for the displayed period that are before or on today's date	The team's required working hours for the displayed period

Planning time for team members

The team timesheet shows logged time. If the following time-planning option is selected in Tempo g lobal configuration, the timesheet also shows planned time: '**Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets.**'

Planned time is indicated by colored bars in the timesheet cells.

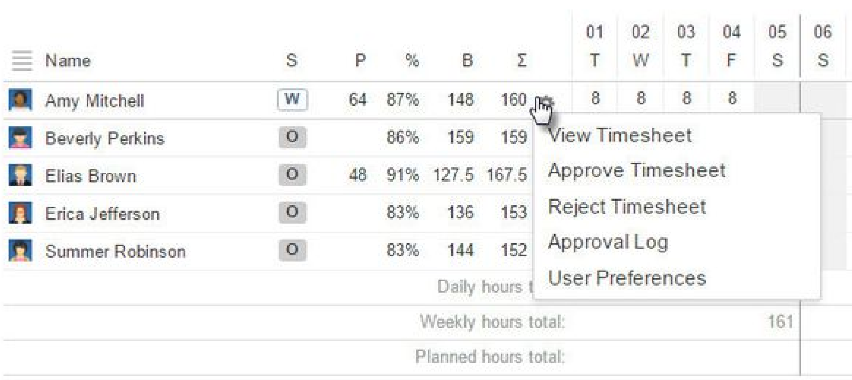
Related topics

- Configuring time-planning options
- Timesheet cell planning

Viewing a team member's timesheet

To view the user timesheet of a team member, complete the following steps:

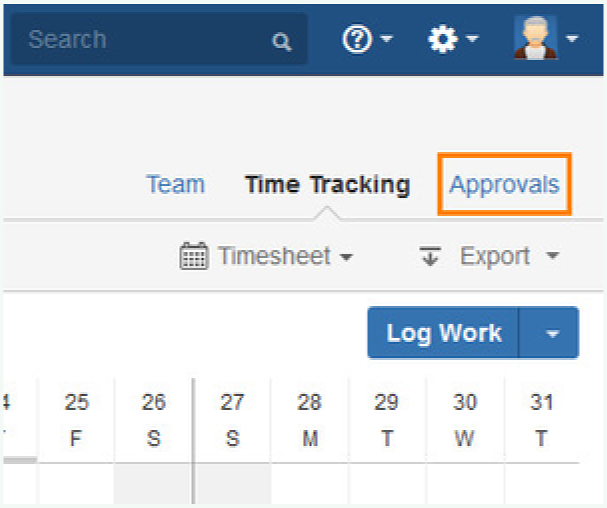
1. Hover over the team member's row. A cogwheel icon is displayed beside the sigma () column.
2. Click the cogwheel, and select **View Timesheet** from the list.



Approving timesheets

If the timesheet approval process is enabled, team leads and other users with Approve Timesheet permission can approve the timesheets of team members from the team timesheet. To approve a timesheet, click the cogwheel in the user row, and select **Approve Timesheet** from the list.

Tip
Alternatively, multiple timesheets can be quickly approved on the Timesheet approvals report. To display the Timesheet approvals report, click **Approvals** on the second menu bar from the top.



Related topics

- Enabling the timesheet approval process
- Timesheet approval process

Viewing user preferences

To view user preferences (workload scheme, holiday scheme, supervisor, email notification) for a team member, click the cogwheel in the team member's row, and select **User Preferences** from the list.

Related topic

User preferences

Granting a grace period for timesheet completion

If the Tempo scheduler is enabled, team leads and other users with Approve Timesheet permission can grant a grace period to team members to complete their timesheets.

Procedure

To grant a grace period to a team member, complete the following steps:

1. Click the cogwheel in the team member's row, and select **Grace Period** from the list.
2. Fill in the requested information in the Grace Period window, and click **Add Grace Period**.

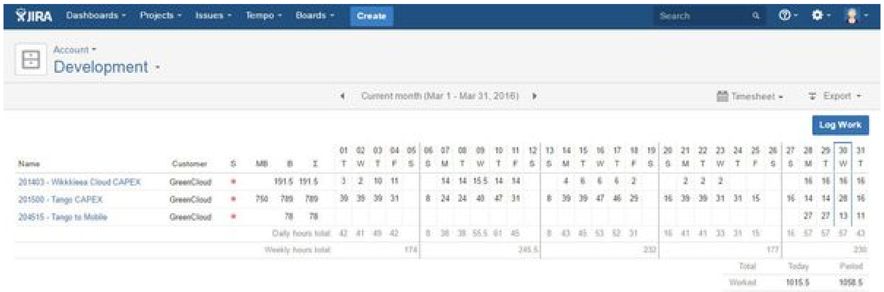
Related topics

- Configuring the Tempo scheduler
- Grace period

Account Timesheet

The account timesheets gives you an overview of accounts, if Tempo Accounts is being used. The accounts that you can access depend on your Browse Projects permission for the linked JIRA projects.

The Account timesheet for for accounts in the Development category



Tutorial

Account approvals before billing

Accessing the account timesheet

Required permission

- Browse Project permission for the account's projects
- View All Worklogs permission for the projects so that you can view the worklogs of other users on the timesheet

Procedure

1. On the main menu bar, click **Tempo** > **Timesheets**.
2. On your user timesheet, in the upper-left corner, click **User** > **Account**.

Selecting accounts to be displayed on the timesheet

1. In the upper-left corner of the account timesheet, click the name that is in big letters, underneath the word **Account**. (In the below example, the name is 'Development.')
2. From the list, select or search for the account attribute for which you want to display accounts on the timesheet. For example, you can select or search for an account key, account name, customer, category, or account lead.

Searching for Tango accounts

Only accounts for which work was logged on JIRA issues in associated projects are displayed on the timesheet.

On this page

In this chapter

Reading the initial information columns

Symbol	S	MB	B	
Stands for	Approval status	Monthly budget	Billed hours	Logged hours
Explanation	The approval status of the account.	Hours that can be spent on the account in the period.	The total number of billed hours in the row, in the displayed time period.	The total number of logged hours in the row, in the displayed time period.
Note		**Related topic** Configuring accounts	The 'Billed hours' column is displayed if one or both of the following conditions are met: • Users with Approve Timesheet permission can set billed hours • Other users can set billed hours **Related topic** Configuring global accounting options	

Reading the 'total' rows

Daily hours total	Refers to logged hours
Weekly hours total	Refers to logged hours

Total	Today	Period
Worked	All logged hours for the displayed period that are before or on today's date	All logged hours for the displayed period

Approving accounts

Team leads and other users with Approve Timesheet permission can approve the account. Once the account is approved, no worklogs on the account report for the period can be edited. To approve an account, click the cogwheel in the account row, and select **Approve** from the list.

The account approval process works only when the period is a calendar month, and the available actions depend on the status of the period that is configured in Tempo period management.

- **Approve** - Disabled until the period has been closed for team members.
- **Revoke Approval** - Enabled only for approved items, if the period is open for users with Approve Timesheets permission.

A **red** dot indicates an *unapproved* account, and a **green** dot indicates an *approved* account. The approval process depends on the Period management status for team leads (or other users with the Approve Timesheet permission) and team members.

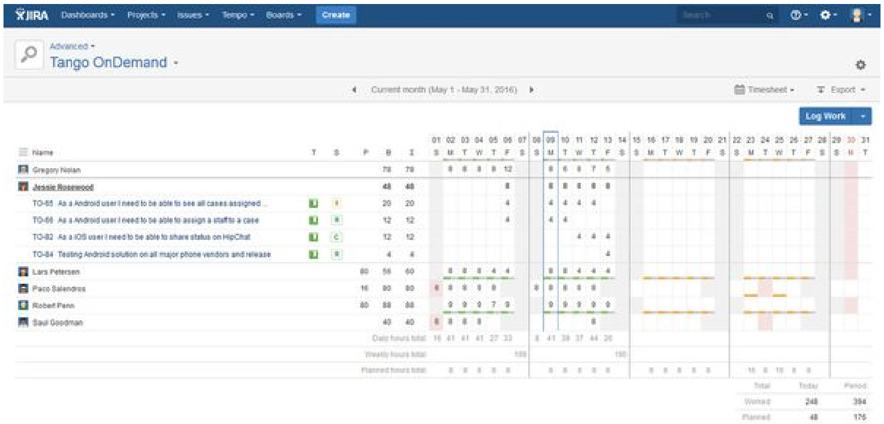
Related topics

- Configuring global accounting options
- Period management

Advanced Timesheet

On the advanced timesheet, you can view issues from your favorite JIRA filters and from two standard filters, **Invalid Worklogs** and **Recently Viewed Issues**.

Overview of the advanced timesheet for a filter (click to enlarge)



On this page

In this chapter

Accessing the advanced timesheet

Required permission

- Browse Project permission
- View All Worklogs permission for projects so that you can view worklogs of other users on the timesheet

Procedure

1. On the main menu bar, click **Tempo** > **Timesheets**.
2. On your user timesheet, in the upper-left corner, click **User** > **Advanced**.

Viewing the timesheet of a different filter

1. In the upper-left corner of the advanced timesheet, click the name of the currently displayed filter.
2. From the list, select the name of the filter that you want to view.

Only the filtered JIRA issues for which work was logged are displayed.

Related topics

- Invalid worklogs

Expanding a user's information

By default, the advanced timesheet displays one row for each user who logged work to the JIRA issues in the filter search result. You can expand the information of a user to view the logged JIRA issues.

Required permission

- View All Worklogs permission for projects

Procedure

To expand the information of a user, click the user's name.

> **Tip**
>
> You can expand the information for all users by clicking the Expand icon above the list of users.

Reading the initial information columns

Symbol	T	S	P	B	
Stands for	Type	Workflow status	Planned hours	Billed hours	Logged hours
Explanation	JIRA Issue type	The workflow status of the JIRA issue.	The total number of planned hours in the row, in the displayed time period.	The total number of billed hours in the row, in the displayed time period.	The total number of logged hours in the row, in the displayed time period.
Note				The 'Billed hours' column is displayed if one or both of the following conditions are met: • Users with Approve Timesheet permission can set billed hours • Other users can set billed hours **Related topic** Configuring global accounting options	

Reading the 'total' rows

Daily hours total	Refers to logged hours
Weekly hours total	Refers to logged hours

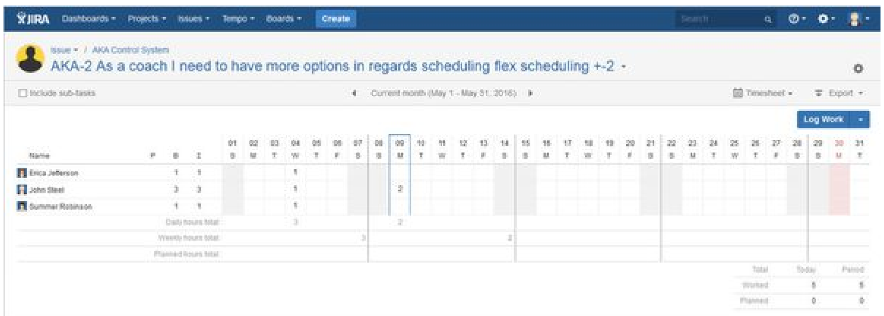
Planned hours total	Refers to daily planned hours

Total	Today	Period
Worked	All logged hours for the displayed period that are before or on today's date	All logged hours for the displayed period
Planned	All planned hours for the displayed period that are before or on today's date	All planned hours for the displayed period
Required	The team's required working hours for the displayed period that are before or on today's date	The team's required working hours for the displayed period

Issue Timesheet

The Issue Timesheet is useful for searching for worklogs for a particular JIRA Issue.

The issue timesheet for a JIRA issue with sub-tasks (click to enlarge)



On this page

In this chapter

Accessing the issue timesheet

Required permission

- Browse Project permission for the issue's project
- View All Worklogs permission for the project so that you can view worklogs of other users on the timesheet

Procedure

1. On the main menu bar, click **Tempo** > **Timesheets**.
2. On your user timesheet, in the upper-left corner, click **User** > **Issue**.

Reading the initial information columns

Symbol	P	B	
Stands for	Planned hours	Billed hours	Logged hours
Explanation	The total number of planned hours in the row, in the displayed time period.	The total number of billed hours in the row, in the displayed time period.	The total number of logged hours in the row, in the displayed time period.

Note		The 'Billed hours' column is displayed if one or both of the following conditions are met: • Users with Approve Timesheet permission can set billed hours • Other users can set billed hours **Related topic** Configuring global accounting options	

Reading the 'total' rows

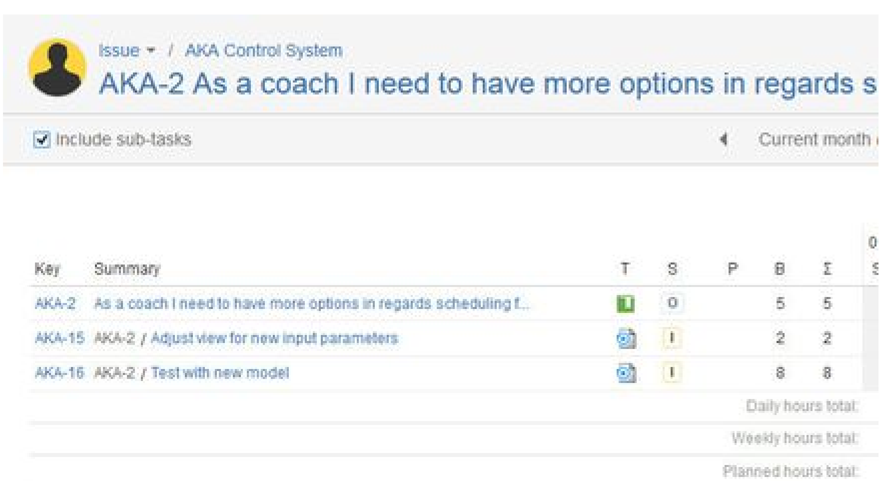
Daily hours total	Refers to logged hours
Weekly hours total	Refers to logged hours
Planned hours total	Refers to daily planned hours

Total	Today	Period
Worked	All logged hours for the displayed period that are before or on today's date	All logged hours for the displayed period
Planned	All planned hours for the displayed period that are before or on today's date	All planned hours for the displayed period
Required	The team's required working hours for the displayed period that are before or on today's date	The team's required working hours for the displayed period

Displaying worklogs from sub-tasks

By default, the timesheet displays one row for each issue. If an issue has sub-tasks, you can display the sub-tasks by selecting the 'Include sub-tasks' check box in the upper-left corner of the timesheet.

The issue timesheet including sub-tasks



Switching among issues

Required [permission](#)

- Browse Project permission for the issue's project
- View All Worklogs permission for the project (if you want to view worklogs on the timesheet)

Procedure

To display the timesheet of a different issue, complete the following steps:

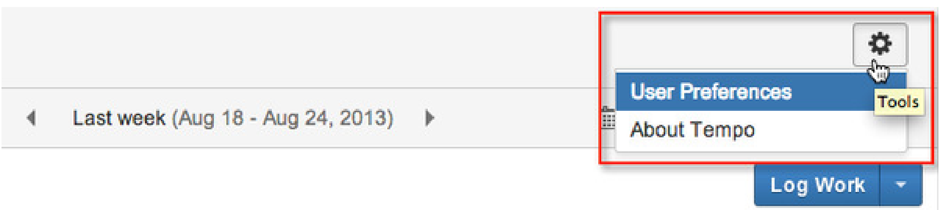
1. On the issue timesheet, on the second menu bar from the top, click the big text; that is, the name of the displayed issue.
2. From the list of issues, select or search for the issue that you want to display.

User preferences

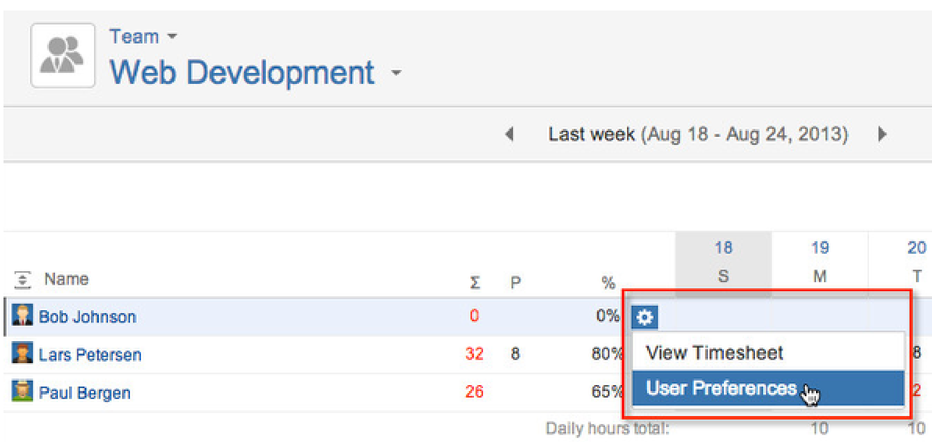
On this page

This is page explains the **User Preferences** both in the **Tools** menu on the Tempo Timesheets Navigation and in the **Actions** list for each user in the different timesheets.

User Preferences in the Tools menu on the Tempo Timesheets Navigation



User Preferences in the Actions list, for user Bob in the Team Timesheet for Team Lead Lars

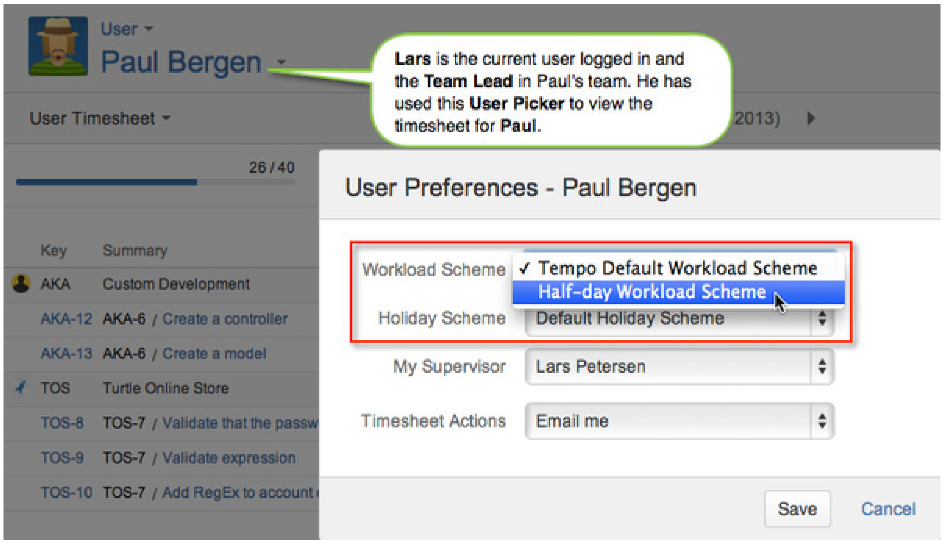


Note, a user that is a **Team Lead** has the Approve Timesheet permission.

Moving Workload and Holiday Scheme Users

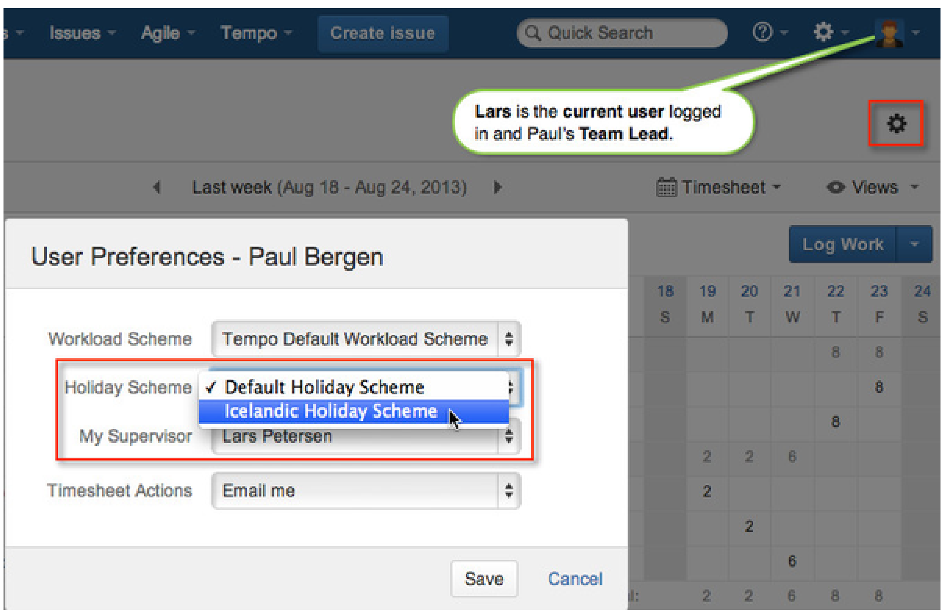
Users with the Approve Timesheet permission (may be the **Team Lead**), have two ways to move team members, between workload schemes and between holiday schemes, through the User Preferences in timesheets. First in the User timesheet the user with the Approve Timesheet permission can use the User Picker to view the timesheet for a team member and then select the User Preferences from the Tools menu. The other way to move the users between schemes is to do so in the Team and Advanced Timesheets. These timesheets display one line (in collapsed mode) for each member in the team (the Advanced Timesheet does only display members that have Logged Work on JIRA Issues in the available filters). Each user line has a cog-wheel or Actions list and by clicking on it, the User Preferences window is displayed (see screenshot above).

*Lars is moving Paul between **Workload Schemes** and he has opened the User Preferences from the Tools menu*



Click the **Save** button to save the changes or **Cancel** link to close without saving.

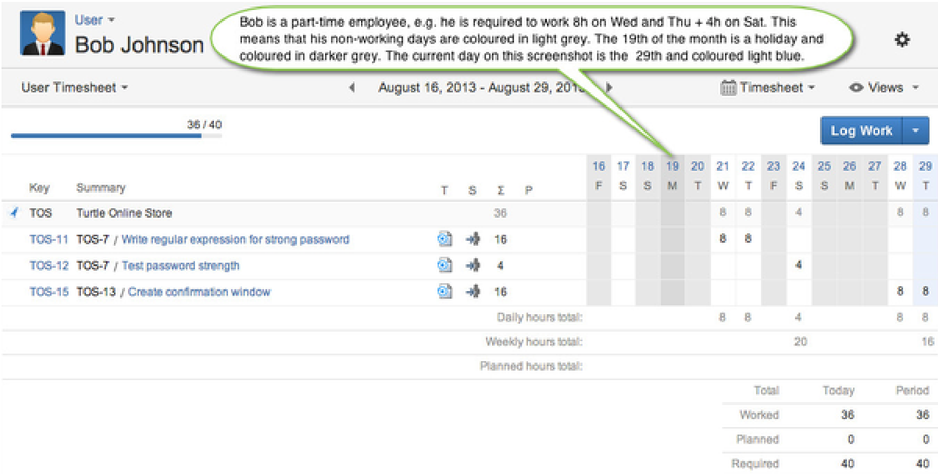
*Similarly Lars can move Paul between **Holiday Schemes** in the User Preferences opened from the Tools menu*



Required Hours and Schemes

The workload schemes and holiday schemes are coordinated to produce joint calculations for a timesheet. The colour coding is only partially reflected by this coordination, e.g. if there is only one user displayed in a timesheet, the colour coding is shown, otherwise the coding for the default schemes is shown.

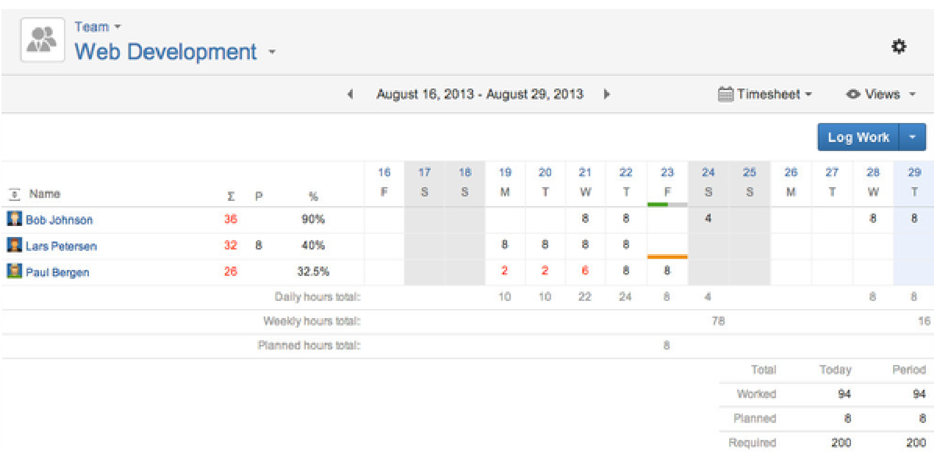
User Timesheet for Paul, showing the Workload/Holiday Schemes coordination in calculations and colouring (click to enlarge)



Lars team members in the Team Timesheet shown on the screenshot below, are in different schemes, therefore the colour coding shown is for the default schemes, e.g. weekends on Saturday and Sunday.

> **Note**, there are more recent screenshots on the Team Timesheet page, showing that Workload/holiday Schemes colour coding is now individually based.

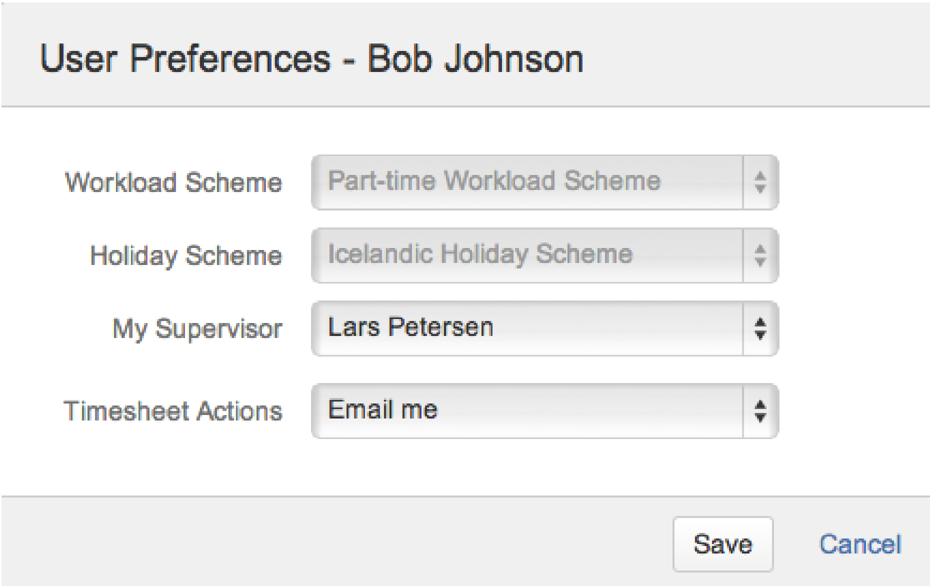
Team Timesheet for Team Lead Lars, showing the default Workload/Holiday Schemes colour coding



User Preferences for Team Members

Team members can only view their schemes in the User Preferences window opened through the **Tools** menu, but they can set their supervisor and if they want to get emails or not.

Bob can view in which schemes he is in, but he can set My Supervisor and Timesheet Actions



When the Team member selects a supervisor (Team Lead) from **My Supervisor** list, it becomes displayed on this Team Leads dashboard in her/his Activity Stream.

If nothing is selected the activity will only display on the current user's dashboard.

The default value for the **Timesheet Actions** is **Email me**, but it can be changed to **Do not email me**, if you don't want to receive emails from the Timesheet Approval Process or the Planning Approval Process.

Team Leads can change these values for all team members in the Actions menu for each user in the Team Timesheet.

Worklog Calendar

The *Worklog Calendar* enables users to create worklogs quickly and easily by dragging suggestions onto a calendar canvas.

Worklog Calendar

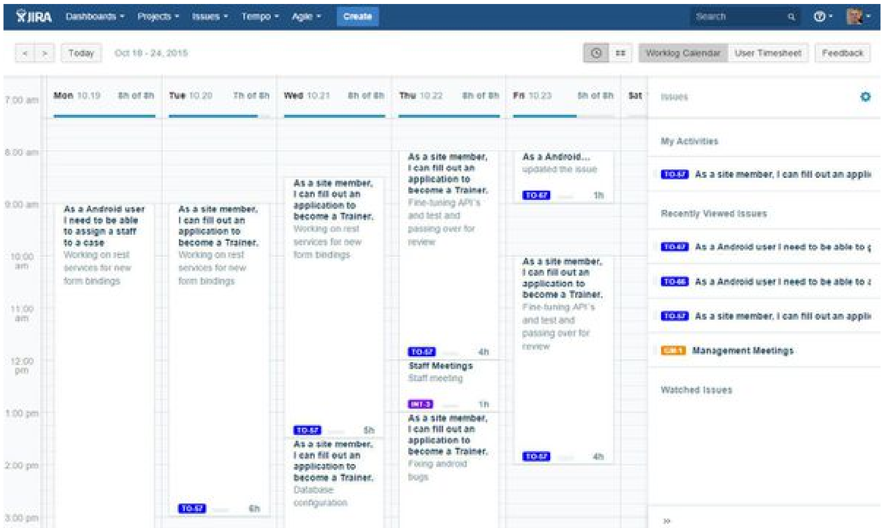
This view is available in Tempo User Timesheet where the user can get a quick overview of logged work for the dates displayed. You can toggle between the *Time View* and the *List view*. In the right section all Suggestion Cards are displayed and these cards can be dragged and dropped into the calendar canvas. The log work form is displayed on this action. A progress bar is displayed for each day showing the logged work vs. the required work for the user.

Tempo Worklog Calendar Time View for a Tempo user - click to enlarge

On this page

In this chapter

Related pages

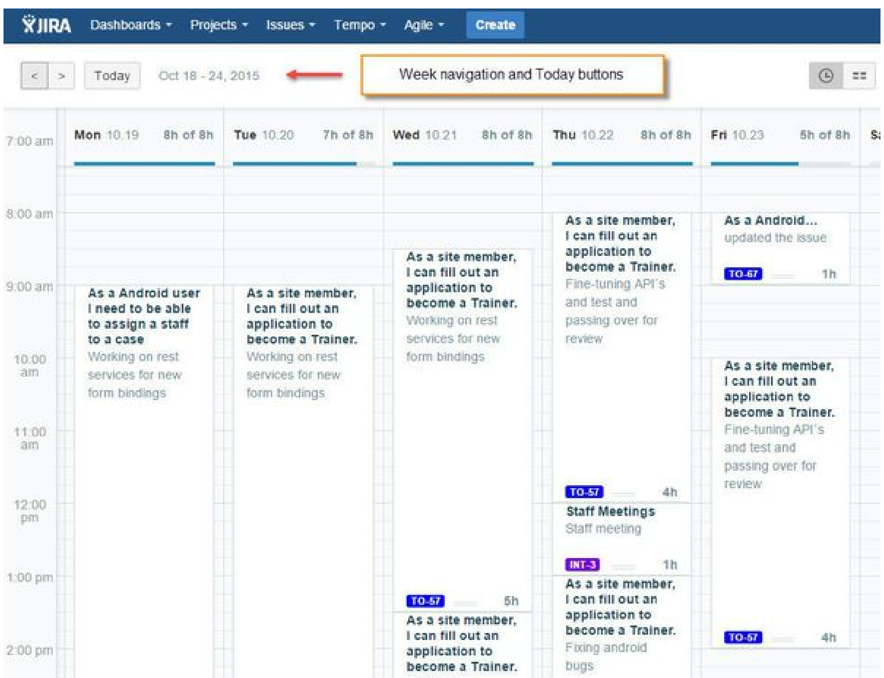


If Project colors are configured in Project Configuration the selected color is displayed in issue link.

Calendar Canvas

The default view in the Calendar Canvas is the week of current date. User can navigate by clicking the navigation buttons. Day navigation toolbar is displayed at the bottom of the page if the screen resolution is low. The *Today* button takes you back to the current date. If worklogs have been created in the selected period they are displayed as Worklog Cards on the canvas.

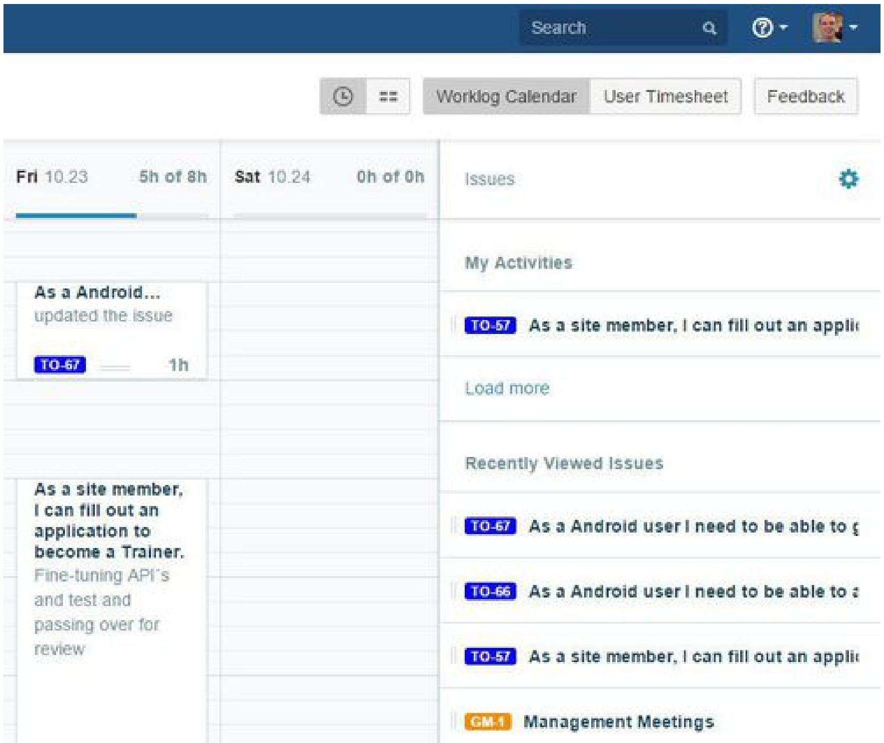
Date Navigation in Calendar Canvas



Suggestion Sections

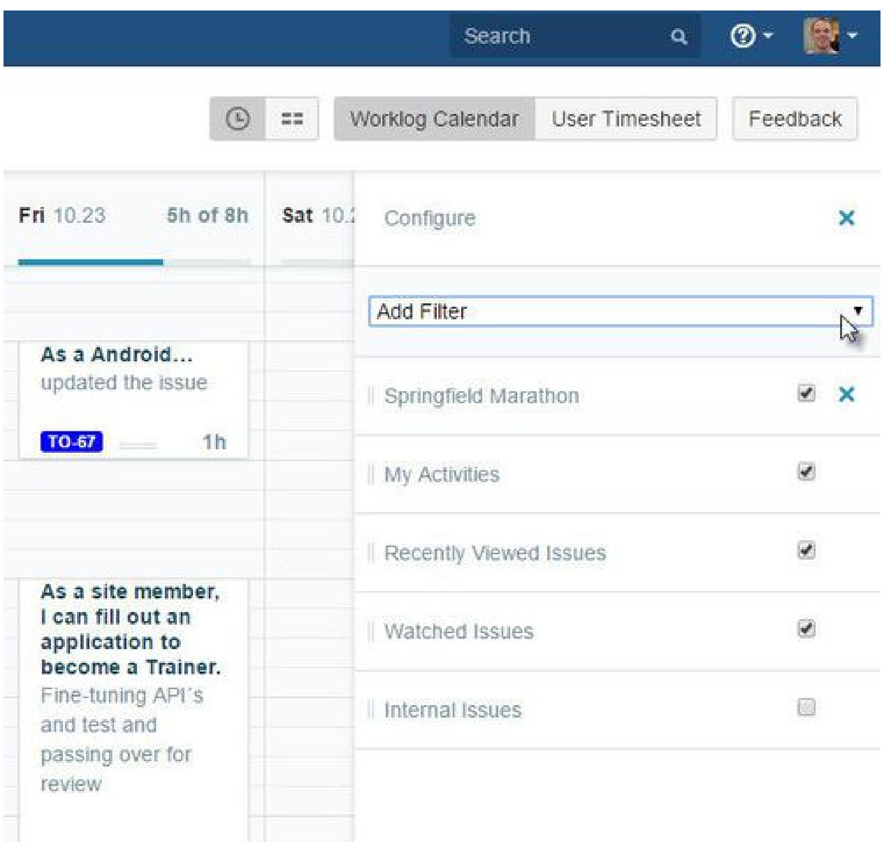
Five suggestion sections are displayed in the right section, each showing JIRA issues from predefined jql searches. If you have JIRA Activity stream configured on your instance latest issues in the activity stream are displayed in the *My Activities* section.

Suggestion Sections in Worklog Calendar



Users can configure which suggestion sections they see in the sidebar and how they should order them by clicking the configure button.
If the issue suggestion list is long, only a part of the list will be shown allowing the users to click a load more button to see more of the list. A JIRA filter from the users Favorite filters can be selected in the configuration mode.

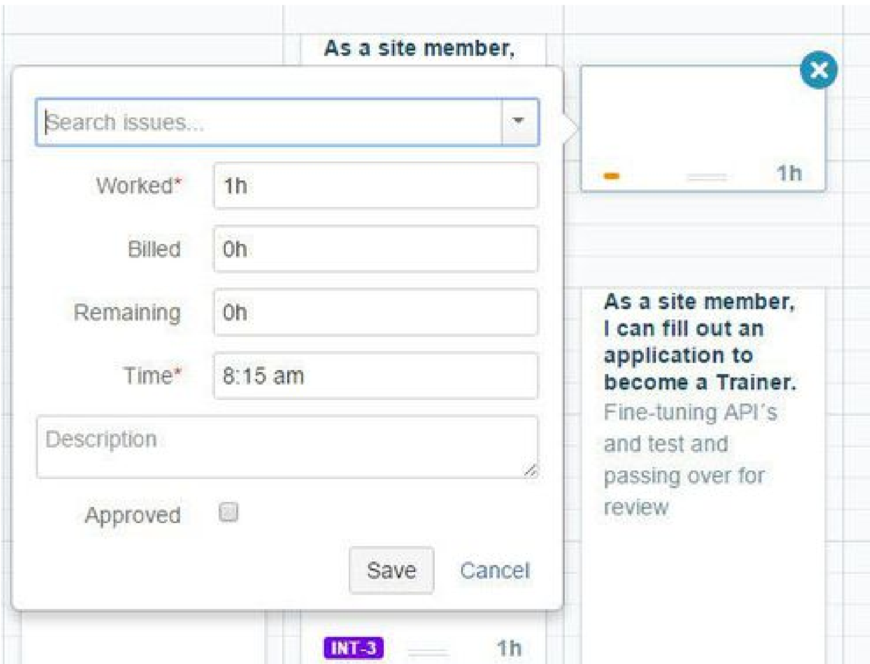
Suggestion Sections in Configure mode



Log Work Form

In addition to the default fields for a worklog all Work Attributes configured in Tempo Timesheets are displayed in the Log Work Form. This form is also validated according to the configuration in Tempo administration.

Log Work Form used in Worklog Calendar



Worklog Calendar Time View

The *Worklog Calendar Time View* is a view in Worklog Calendar. The view enables users to create worklogs quickly and easily by dragging suggestions onto a time cell on the calendar canvas. The start time field is always visible in Time View but it's visibility in List view depends on the following setting in Tempo global configuration: "Users can specify a start time when they log work."

Time View

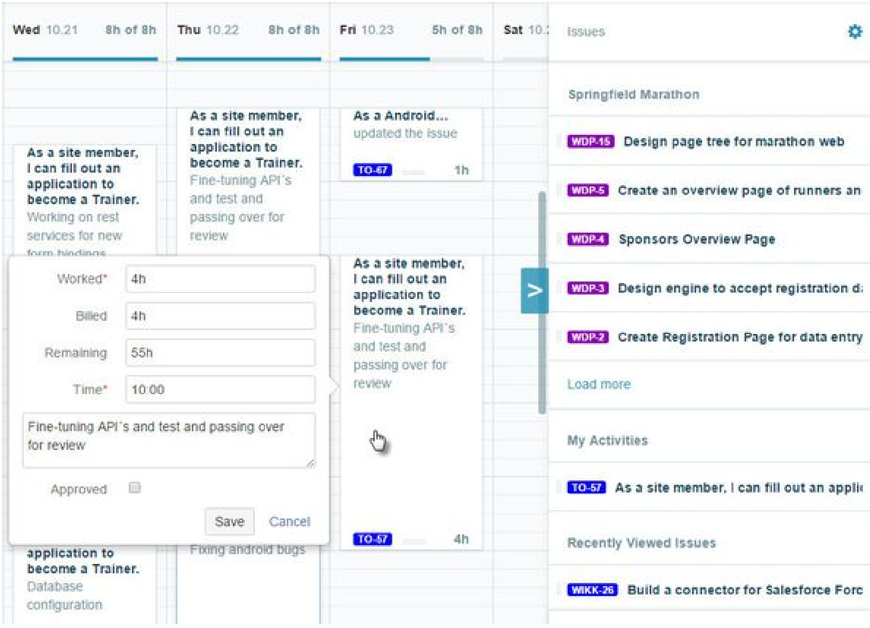
In the *Worklog Calendar Time View* you can get a quick overview of logged work for the dates displayed and visualize gaps and overlaps in your timesheet. In the right section all Suggestion Cards are displayed and these cards can be dragged and dropped to a time cell on the calendar canvas. The log work form is displayed on this action.

Tempo Worklog Calendar Time View - click to enlarge

On this page

In this chapter

Related pages

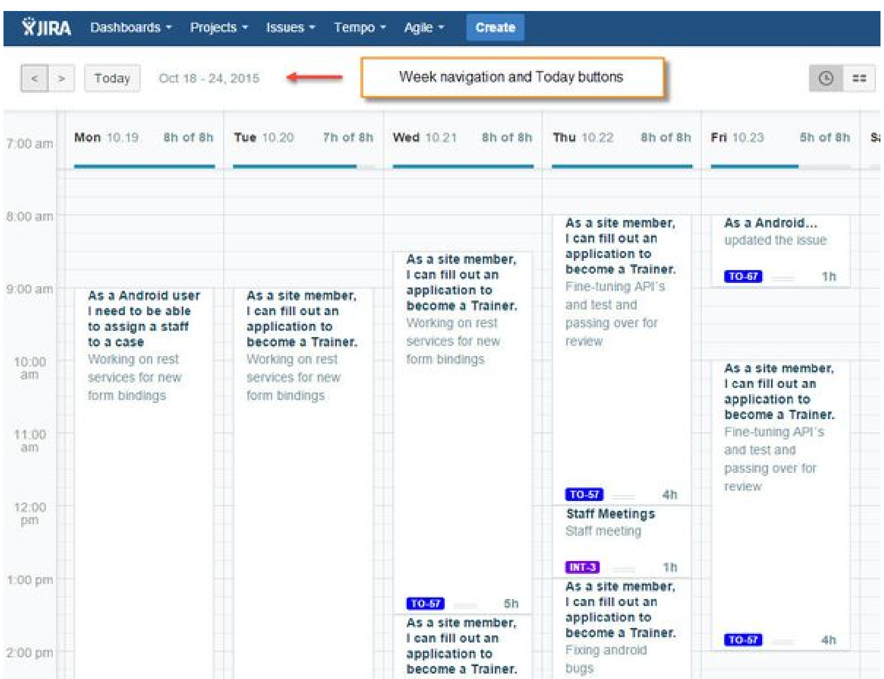


If Project colours are configured in Project Configuration the selected colour is displayed in issue link.

Calendar Canvas

The default view in the Calendar Canvas is the week of current date. User can navigate by clicking the navigation buttons. Day navigation toolbar is displayed at the bottom of the page if the screen resolution is low. The *Today* button takes you back to the current date. If worklogs have been created in the selected period they are displayed as Worklog Cards on the canvas.

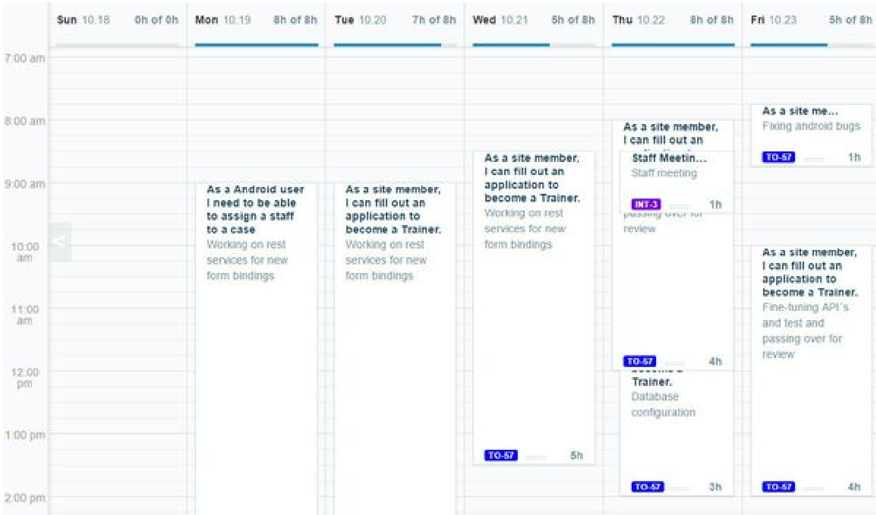
Date Navigation in Calendar Canvas



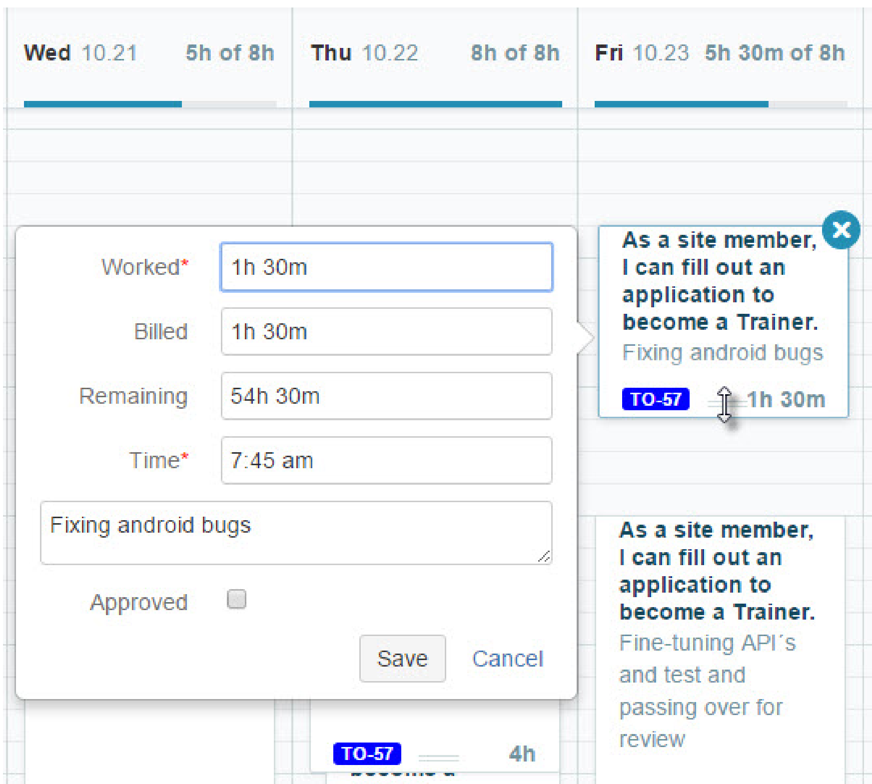
Gaps and Overlaps

You can see the gaps in the Calendar Canvas and If worklogs overlap, they appear stacked on top of each other so you can easily correct the logged time.

Visualizing gaps and overlaps of worklogs in Time View



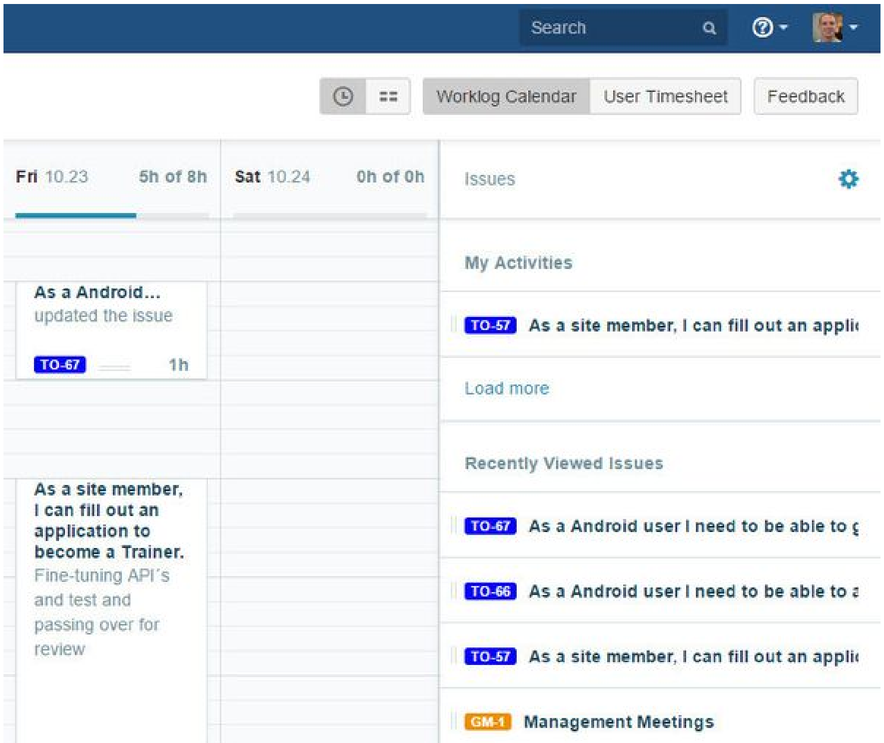
The duration of the worklog can easily be edited by dragging the Worklog Card on the timeline in the Time View.



Suggestion Sections

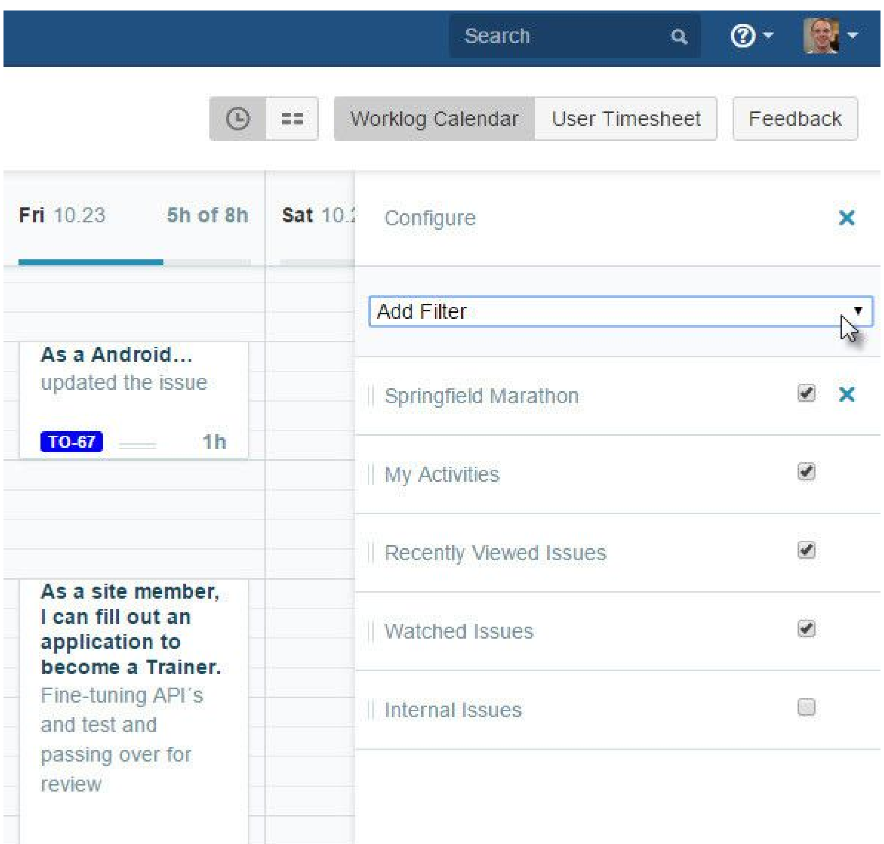
Four suggestion sections are displayed in the right section, each showing JIRA issues from predefined jql searches. If you have JIRA Activity stream configured on your instance latest issues in the activity stream are displayed in the *My Activities* section.

Suggestion Sections in Worklog Calendar



Users can configure which suggestion sections they see in the sidebar and how they should order them by clicking the configure button.
If the issue suggestion list is long, only a part of the list will be shown allowing the users to click a load more button to see more of the list. A JIRA filter from the users Favorite filters can be selected in the configuration mode

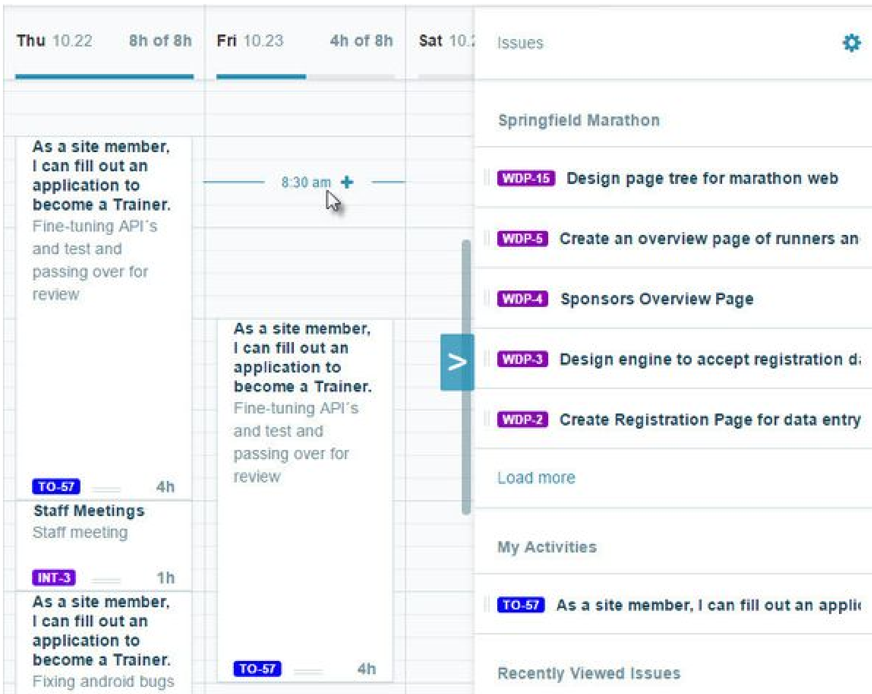
Suggestion Sections in Configure mode



Log Work Form

In addition to the default fields for a worklog all Work Attributes configured in Tempo Timesheets are displayed in the Log Work Form. This form is also validated according to the configuration in Tempo administration. A progress bar is displayed for each day showing the logged work vs. the required work for the user.

Log Work Form used in Worklog Calendar



Time Format

JIRA administrators can change the time format that is displayed in the Time view of the worklog calendar and on other JIRA and Tempo pages; for example, a 24-hour format can be displayed, or a 12-hour format with 'am' and 'pm'.

Related topic for administrators

Changing date and time formats

Worklog Calendar List View

The *Worklog Calendar List View* is a view in Worklog Calendar. The view enables users to create worklogs quickly and easily by dragging suggestions onto a time cell on the calendar canvas.

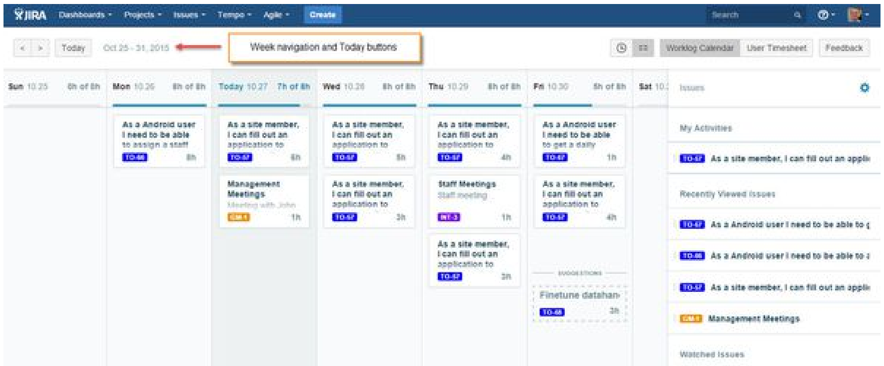
On this page

In this chapter

List View

In the *Worklog Calendar List View* you can get a quick overview of logged work for the dates displayed in your timesheet. In the right section all Suggestion Cards are displayed and these cards can be dragged and dropped to a time cell on the calendar canvas. The log work form is displayed on this action.

Tempo Worklog Calendar List View - click to enlarge



Related pages

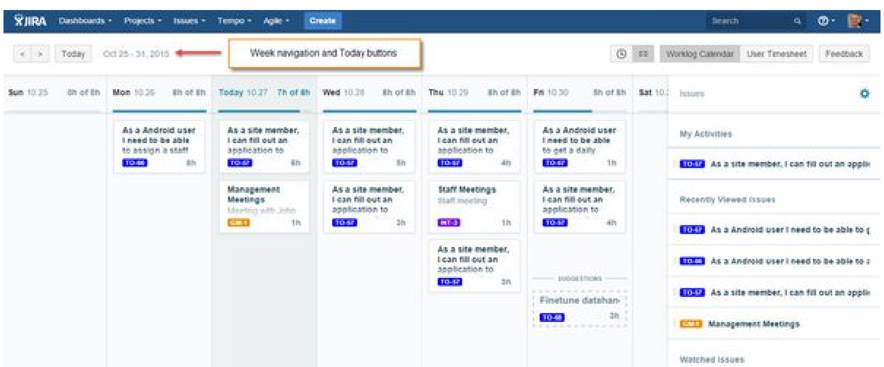
[Worklog Suggestions](#) are displayed on the dates in this view. These suggestions can easily be changed to worklogs or dismissed if not applicable

If Project colours are configured in [Project Configuration](#) the selected colour is displayed in issue link.

Calendar Canvas

The default view in the Calendar Canvas is the week of current date. User can navigate by clicking the navigation buttons. Day navigation toolbar is displayed at the bottom of the page if the screen resolution is low. The *Today* button takes you back to the current date. If worklogs have been created in the selected period they are displayed as [Worklog Cards](#) on the canvas and they are all fixed size.

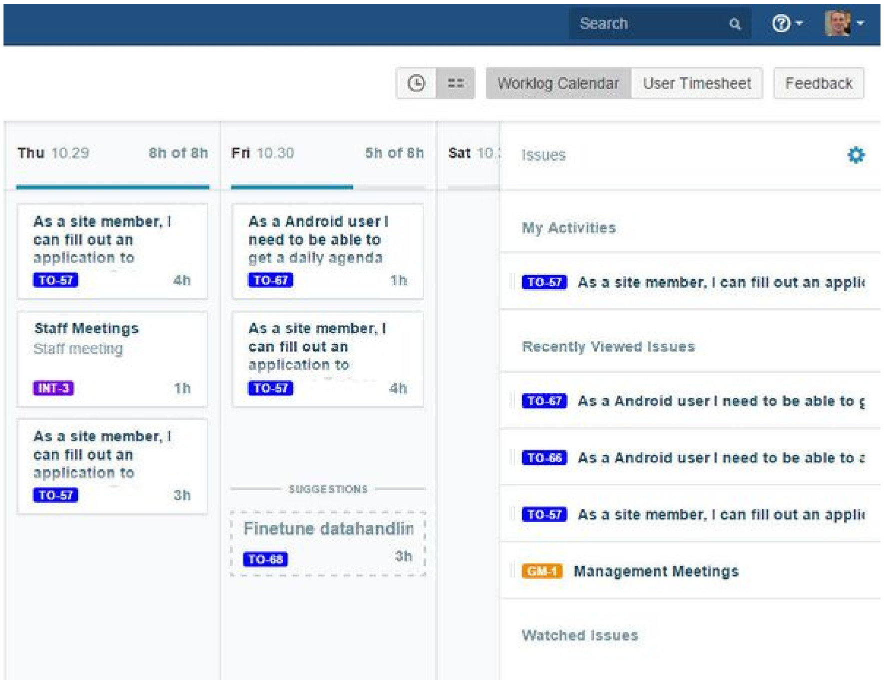
Date Navigation in Calendar Canvas



Suggestion Sections

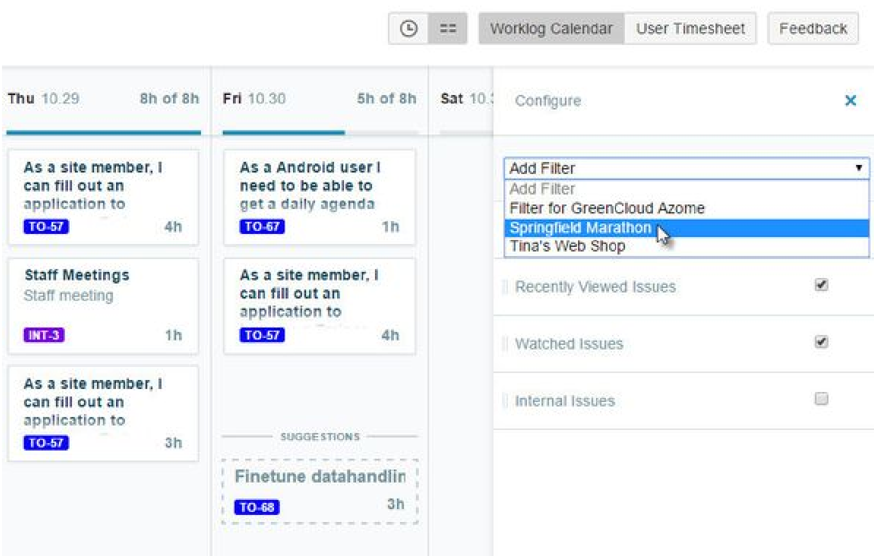
Four [suggestion sections](#) are displayed in the right section, each showing JIRA issues from predefined jql searches. If you have JIRA Activity stream configured on your instance latest issues in the activity stream are displayed in the *My Activities* section.

Suggestion Sections in Worklog Calendar



Users can configure which suggestion sections they see in the sidebar and how they should order them by clicking the configure button.
If the issue suggestion list is long, only a part of the list will be shown allowing the users to click a load more button to see more of the list. A JIRA filter from the users Favorite filters can be selected in the configuration mode

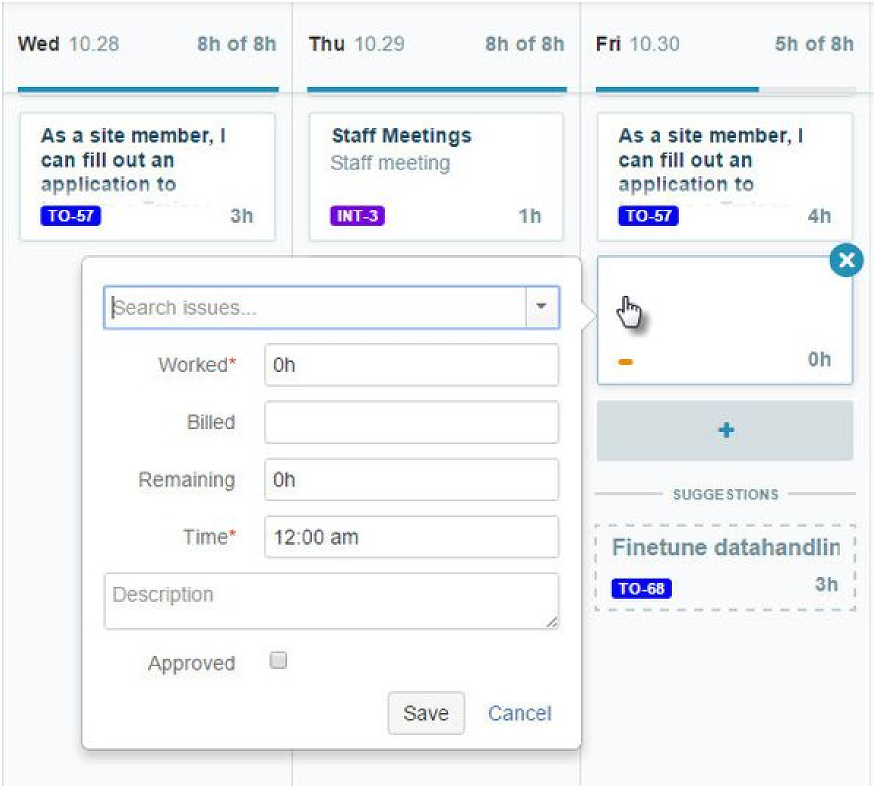
Suggestion Sections in Configure mode



Log Work Form

In addition to the default fields for a worklog all Work Attributes configured in Tempo Timesheets are displayed in the Log Work Form. This form is also validated according to the configuration in Tempo administration. A progress bar is displayed for each day showing the logged work vs. the required work for the user.

Log Work Form used in Worklog Calendar



Using Suggestion Cards

Suggestion sidebar is displayed on the right side in Tempo Worklog Calendar. Five types of suggestion sections are displayed in the sidebar each containing a list of suggestion cards. JIRA issues in the Suggestion Cards are sorted by latest update and the first 50 issues in the filter result are displayed in each section. A *Load more* link is displayed for large search results.

Suggestion Types

1. **JIRA Filter** - Filters can be selected from the users Favorite filters list.
2. **Recently Viewed Issues** - Issues that current user has viewed recently
3. **Watched Issues** - Issues that current user is watching
4. **Internal Issues** - Internal Issues if configured on the instance and current user has browse permission on the project.
5. **My Activities** - Showing users latest activities if *Activity Stream* is enabled on your instance.
   My Activities feature is only available in JIRA 6.4.1 and later versions.

Select Suggestions

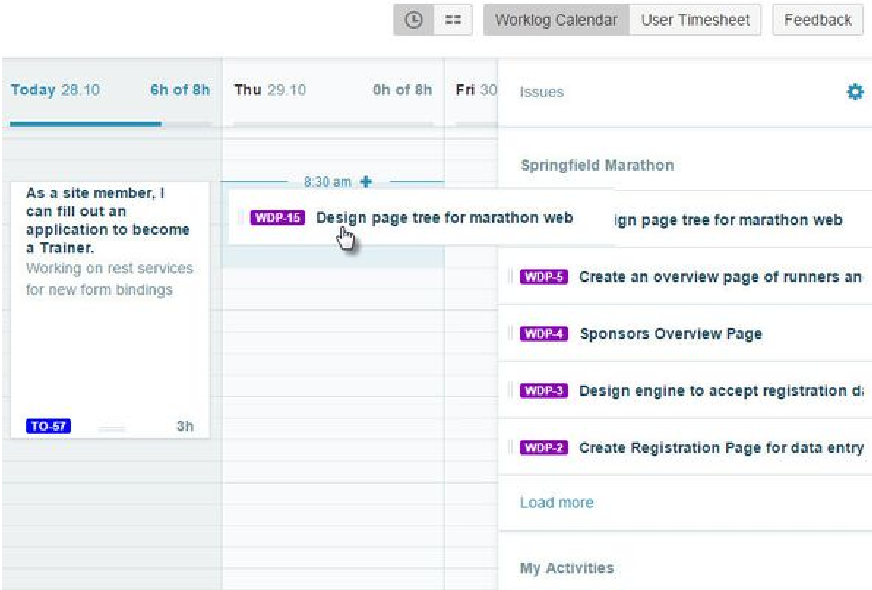
Suggestion Cards can easily be moved to a date on Calendar canvas by using the drag-and-drop method.

Dragging a suggestion into the calendar canvas

On this page

In this chapter

Related pages



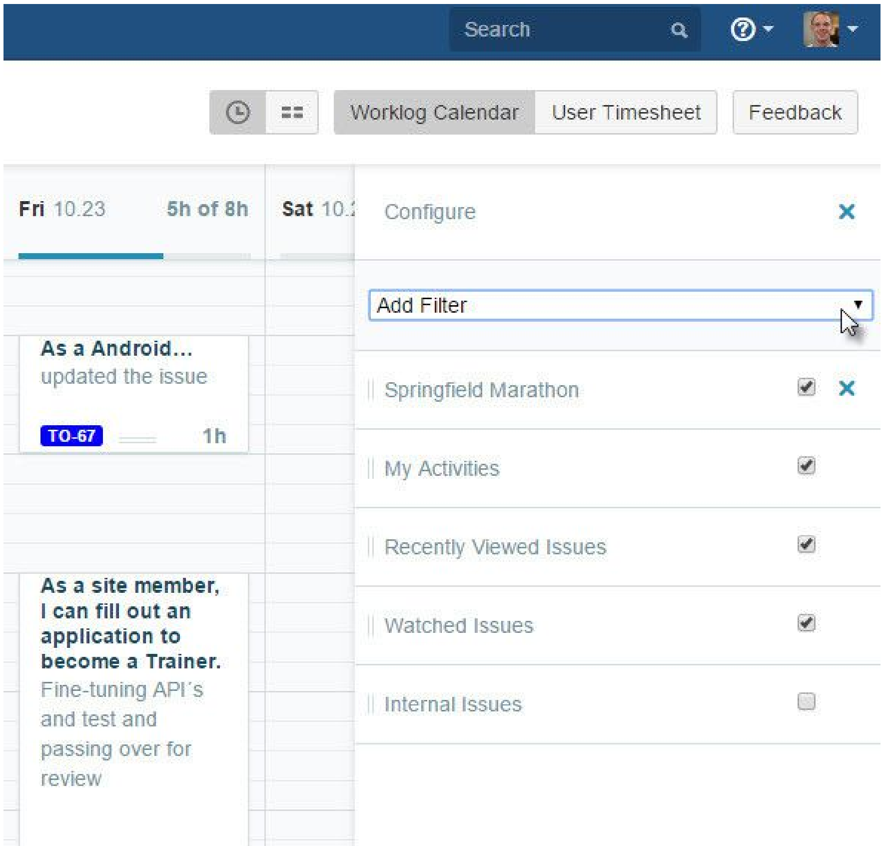
Steps to drag a Suggestion Card into the Calendar canvas:

1. Hover over the Suggestion Card and click the mouse button
2. Drag the selected card to the date you want to log for and time if you are in the Time View
3. Release the mouse button and the log work form is displayed with the issue selected.
4. Fill in the fields to complete your worklog
5. Click **Save** if you are done or **Cancel** to close without saving.

Select Suggestions Sections

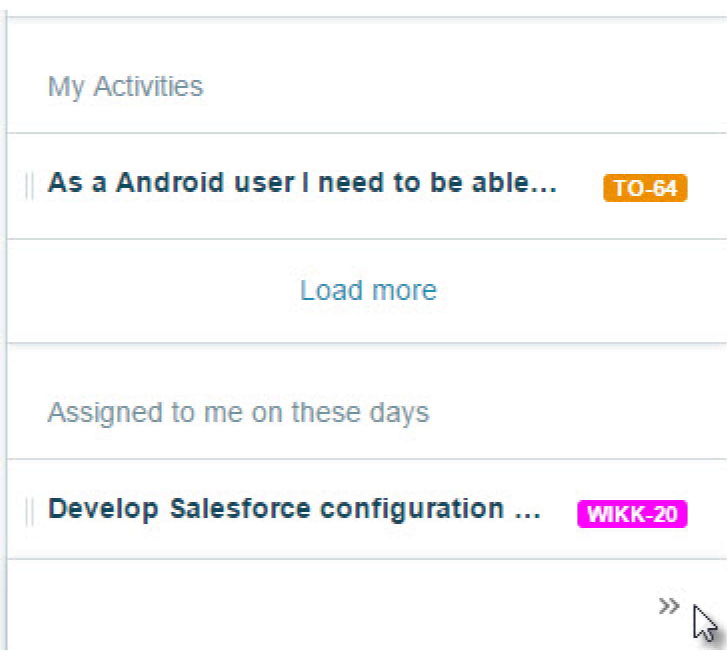
All Suggestion Sections are displayed by default and Empty State messages are displayed if there is no search result for the user. You can select what sections are displayed and order the display by moving the sections in the configure mode according to your needs. The state is saved to be displayed the next time you view the Worklog Calendar.

Suggestion Sections in Configure mode



User can hide the Suggestion Sections by clicking the >> icon on the left bottom of the page.

Show or hide Suggestion Section



Using the Log Work Form

The *Log Work* form is displayed either by clicking an empty spot on the canvas, by clicking an existing worklog card or by dragging a Suggestion Card onto the canvas. In Worklog Calendar Time View you can be created worklogs in 15m intervals by clicking on the canvas grid and drag it towards the end time. Hover over grid shows start time of worklog. To log work on the issue you need the Work On Issues permissions in the issue´s relevant project.

On this page

In this chapter

Related pages

Tutorial

(Video without voiceover. Time: 2:04)

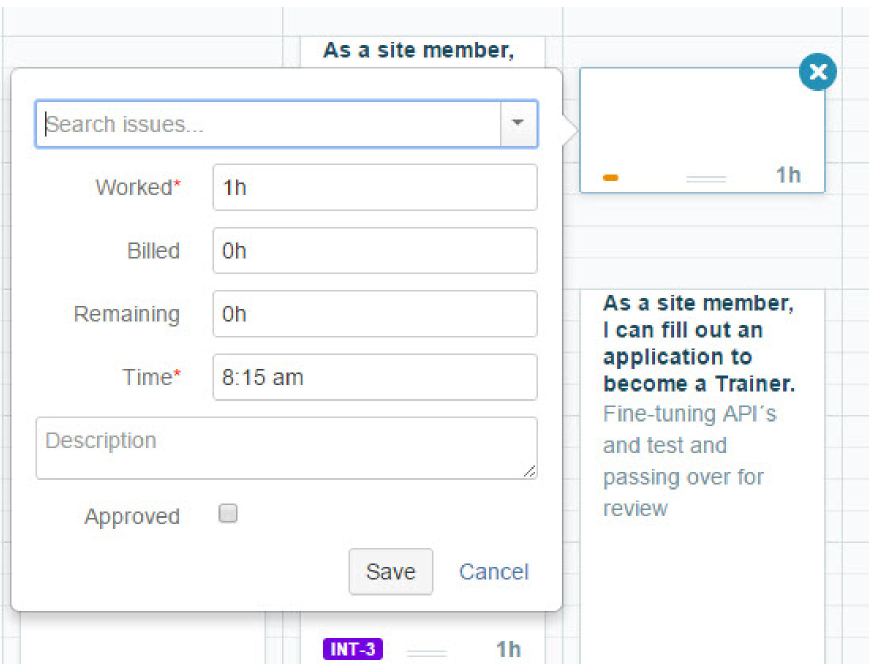
Log Work

The issue is selected in the form when dragged from a worklog suggestion and the default field in the form are:

1. **Worked** - Hours worked
2. **Remaining** - Remaining estimate is displayed if set on the issue selected.
3. **Time** - displayed if configured in Tempo Global Configuration or if you are in the Time View
4. **Description** - Worklog description

In addition all fields configured as Tempo Work Attributes are displayed in the form. The *Billed* field is displayed in the log work form if Billed Hours is configured on your instance.

Log Work form in Worklog Calendar Time View - click to enlarge



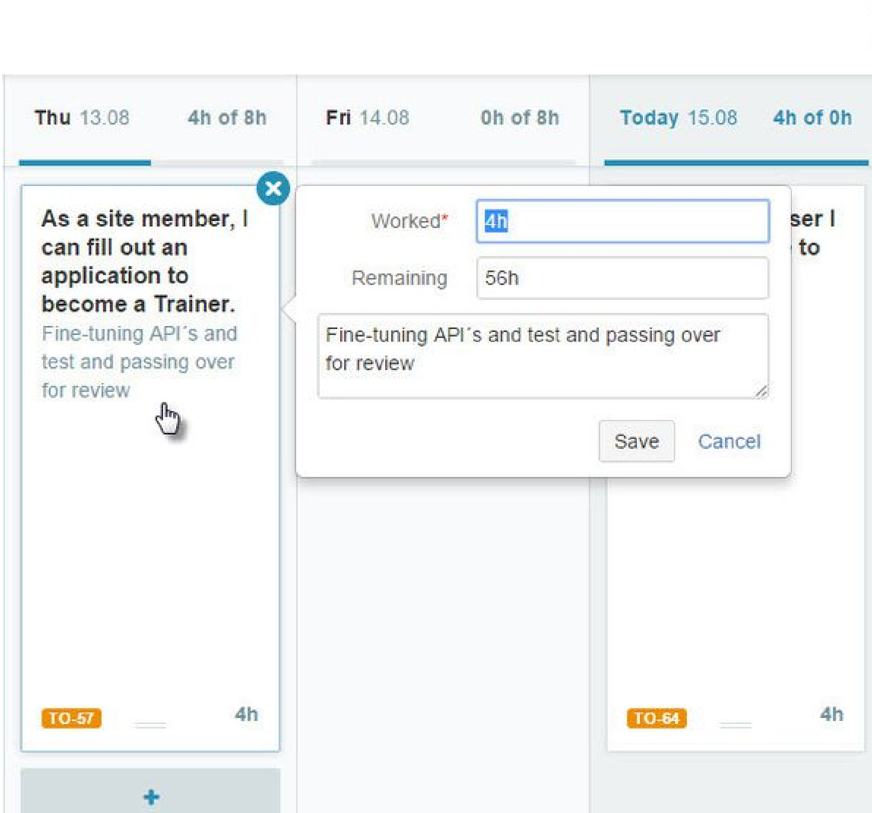
Steps to log work in the Log Work form:

1. Verify the issue selected or select another issue
2. Write a value in the default worklog fields
3. Write or select a value on Tempo work attributes if displayed
4. Click **Save** if you are done or **Cancel** to close without saving.

Edit Worklogs

You can click on the Worklog Card to edit a worklog in the Calendar canvas.

User has clicked a Worklog Card to edit a worklog



Steps to edit a worklog in the Log Work form:

1. Click on the Worklog Card for the worklog you want to edit
2. Edit the fields according to your needs
3. **Save** if you are done or **Cancel** to close without saving.

Move and Split worklogs features are not implemented in the Log Work form in this version.

Steps to delete a worklog in the Log Work form:

1. Click the **X** icon on the top right corner of the Worklog Card

Using the Worklog Cards

Worklog Cards are displayed if the user has logged work within the selected date range. User can edit and delete worklog cards.

Log Work

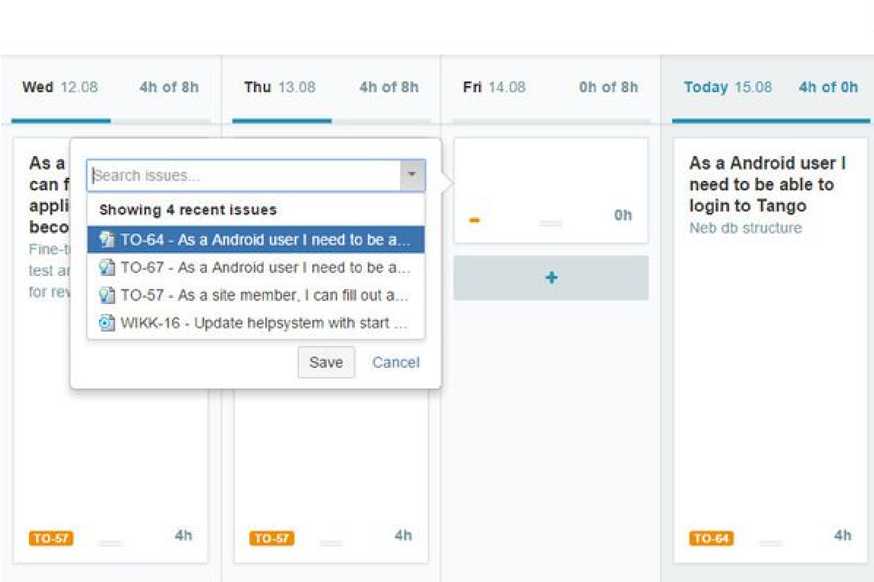
In addition to use the Suggestion Cards for logging work you can click a date in Calendar canvas to open the Log Work form.

Log Work form displayed without issue selected

On this page

In this chapter

Related pages



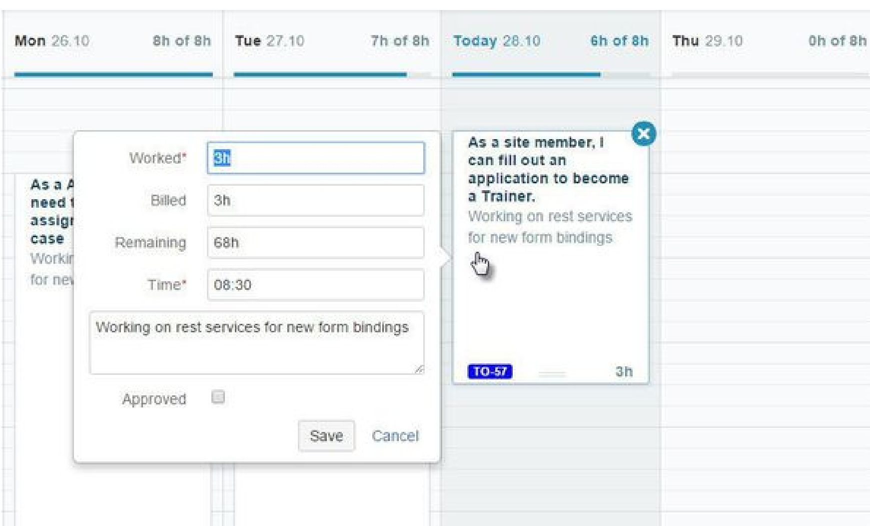
Steps to log work in the Log Work form:

1. Click a date on the Calendar canvas
2. Search for an issue in the issue searcher field
3. Fill in the fields to complete your worklog
4. Click **Save** if you are done or **Cancel** to close without saving.

Edit Worklogs

You can edit a worklog in the Calendar canvas by clicking the Worklog Card if you want to edit the fields in the Log Work form.

Log Work form displayed by clicking the Worklog Card

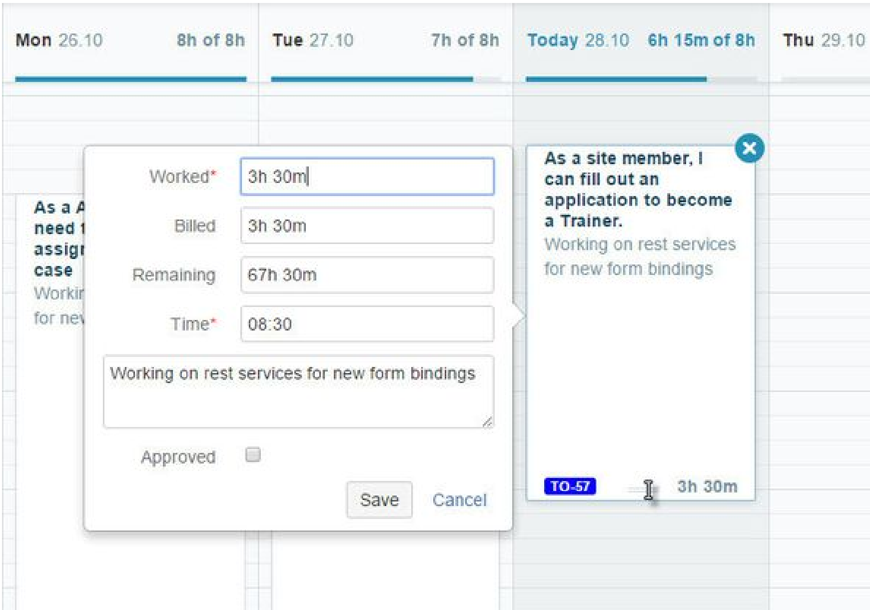


Steps to edit a worklog in the Log Work form:

1. Click on the Worklog Card for the worklog you want to edit
2. Edit the fields according to your needs
3. **Save** if you are done or **Cancel** to close without saving.

If you only want to edit the hours worked you can re-size the card on the canvas if you are in the Time View.

Logged hours edited by dragging the card on the canvas



You can move and copy worklog cards but the *Split Worklog* feature are not implemented in the Log Work form in this version.

Steps to delete a worklog in the Log Work form:

1. Click the **X** icon on the top right corner of the Worklog Card

Move and Copy Worklog

You can Move and Copy existing worklogs that are displayed in the Calendar Canvas.

Move Worklog

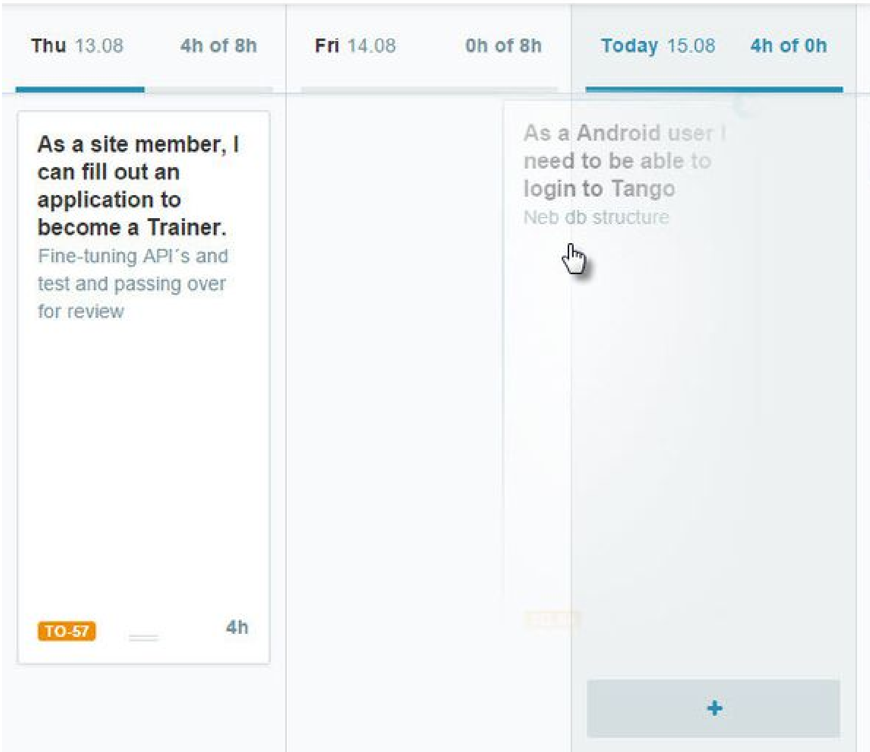
User can move own worklogs within the dates that are displayed in the Calendar Canvas.

Moving a worklog to another date

On this page

In this chapter

Related pages



Steps to move a worklog within the dates in the Calendar canvas:

1. Hover over the worklog and click the mouse button
2. Drag the selected worklog to the date you want to move to
3. Release the mouse button and the worklog has been moved to the target date.

Copy Worklog

Steps to copy a worklog within the dates in the Calendar canvas:

1. Hover over the worklog, click the mouse button and hold it down, meanwhile press the *Ctrl* button
   The cmd button is used on a Mac
2. Drag the selected worklog to the date you want to move to
3. Release the mouse button and the worklog has been copied to the target date.
4. Update the fields to complete your worklog if needed.
5. Click **Save** if you are done or **Cancel** to close without saving.

Using Worklog Suggestions

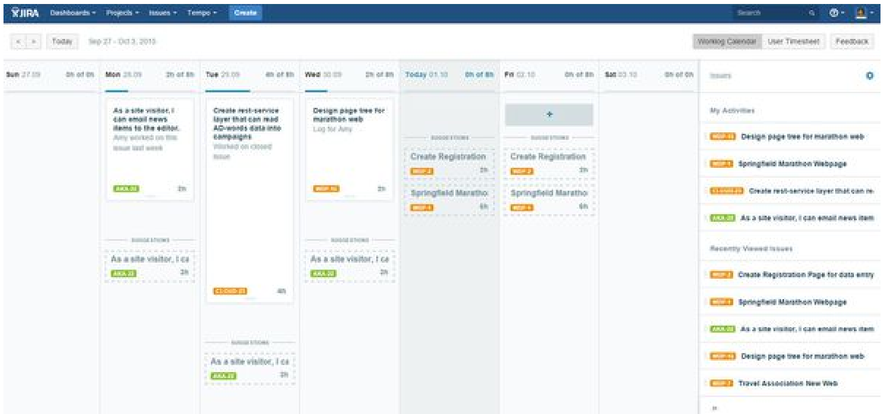
A user who opens the *Worklog Calendar* List View can see Worklog Suggestions displayed below the worklogs already submitted for the week. These suggestions can easily be changed to worklogs or dismissed if not applicable.

On this page

Worklog suggestions

The suggestions are displayed for the current user if the JIRA issue is assigned to the user, has time in *Remaining Estimate*, and is unresolved. In addition, the issue needs to be in the user's issue history, as the list is sorted by last viewed.

Worklog suggestions for a Tempo user displayed on the calendar - click to enlarge



In this chapter

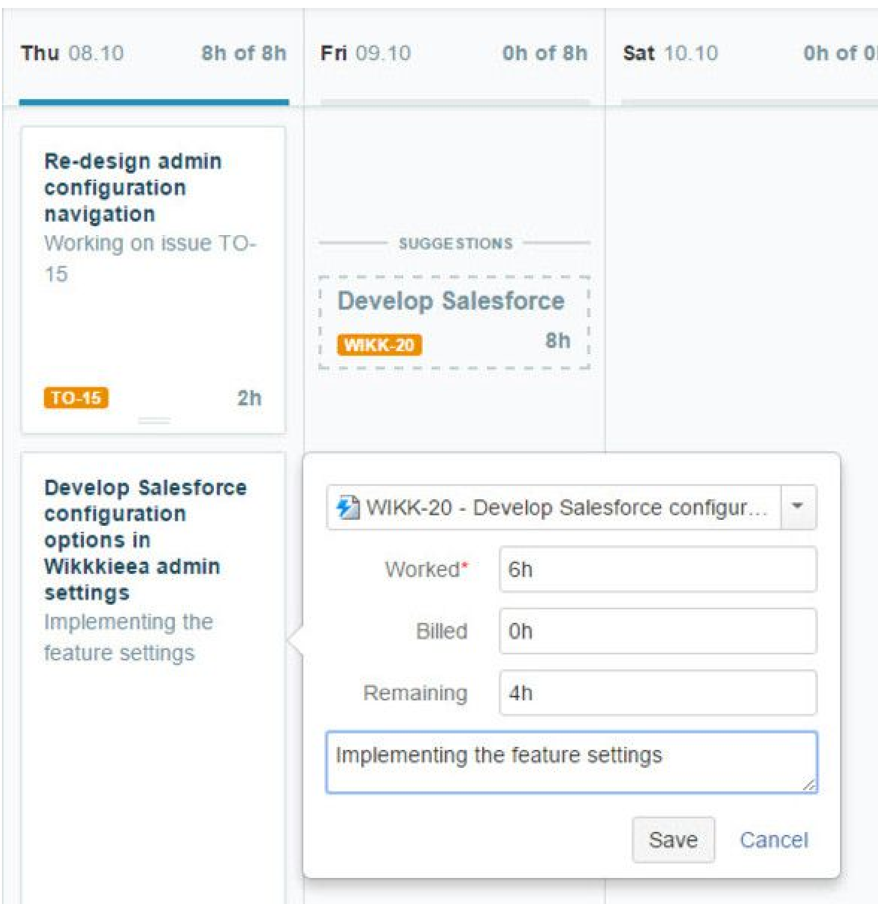
Related pages

The suggested hours and the number of suggested issues are based on the remaining workload for the day and on the issue's remaining estimate.

Accepting a suggestion

To accept a suggestion and convert it to a worklog item, click on the suggestion.

A worklog form is displayed.

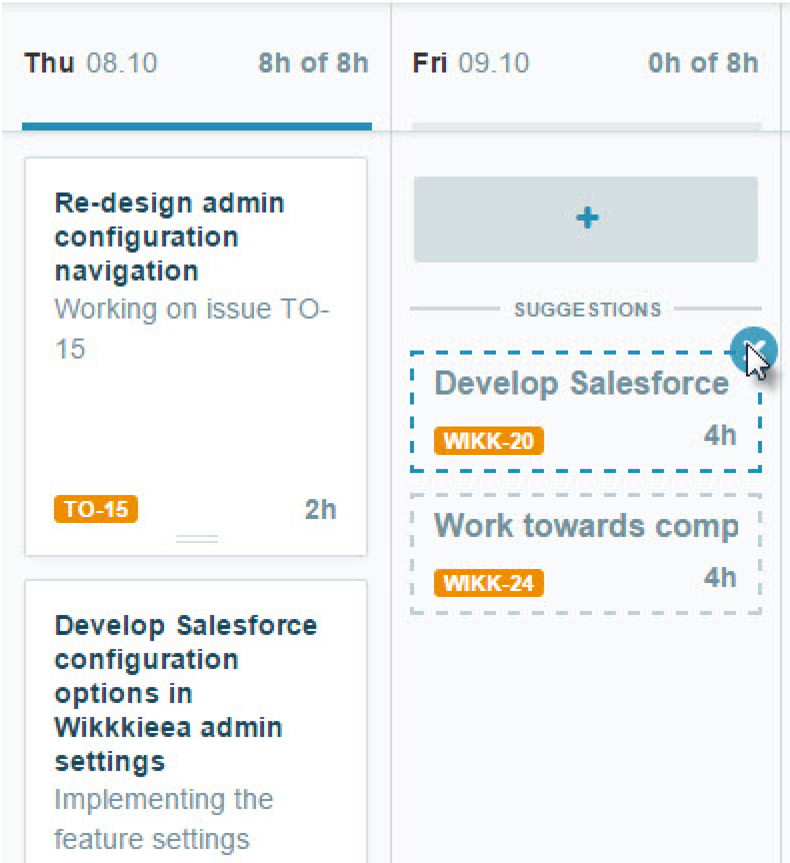


Verify the value in the fields, and optionally write a description.

Click **Save**.

Deleting a suggestion

If you do not want to accept a worklog suggestion, you can delete it by clicking the X in the top right corner of the suggestion.



Configuring Suggestion Sidebar

The suggestion sidebar is displayed on the right side of the Tempo Worklog Calendar and can be configured for each user.

Selecting suggestion sections

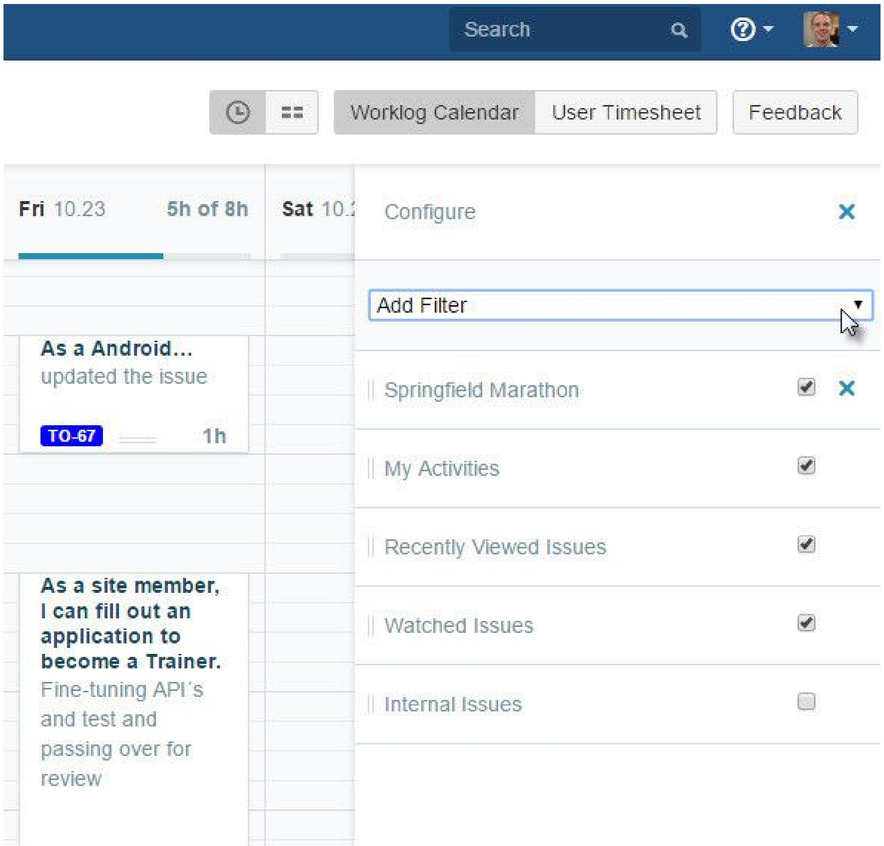
All suggestion sections are displayed by default, and a message is displayed if there is no search result for the user. You can select the sections to be displayed and rearrange the display by moving the sections in the configure mode, according to your needs. The state is saved to be displayed the next time you view the Worklog Calendar.

Click the cog-wheel to open the suggestion section in edit mode.

On this page

In this chapter

Related pages

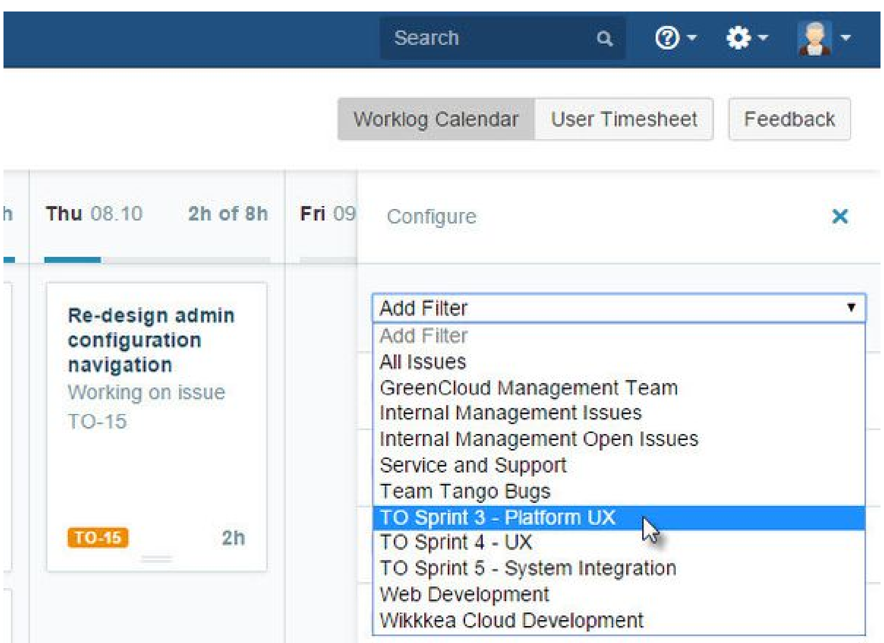


In edit mode, you can rearrange the section or hide a section if you don't want it to be displayed in the sidebar.

Displaying JIRA filters

A JIRA filter from the user's favorite list can be selected to be displayed in the Suggestion section.

Selecting a JIRA filter - click to enlarge



You can display more than one filter in the suggestion sidebar, and each filter has its own section.

The Assigned to Me section that was displayed by default in previous versions has been removed because users can easily create that filter as a favorite.

Click the **X** in the top right section to exit Configure mode.

Viewing the user timesheet status

You can know how far you have progressed towards meeting your work requirements by viewing your user timesheet status. When the timesheet is ready, you can submit it for approval.

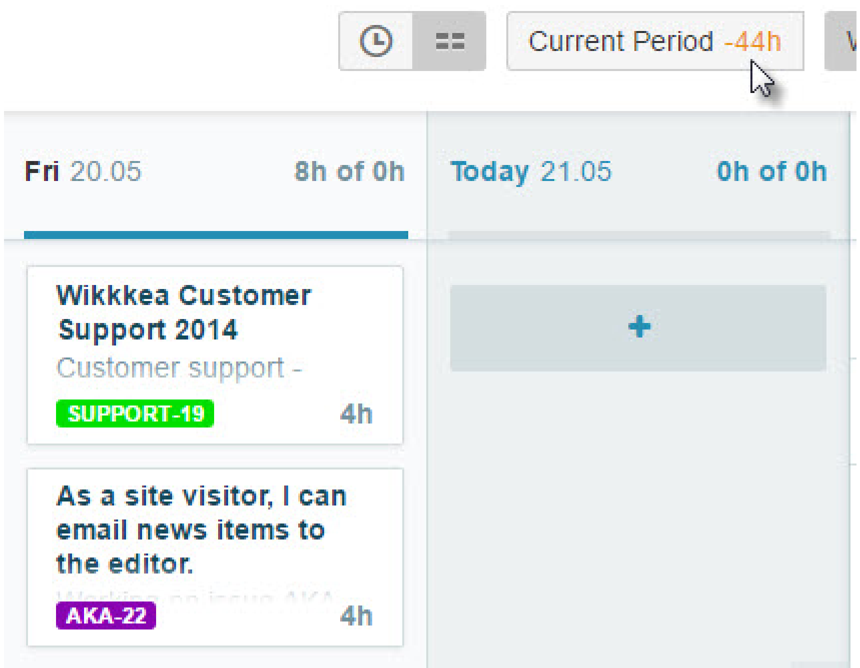
On this page

Viewing the status

Procedure

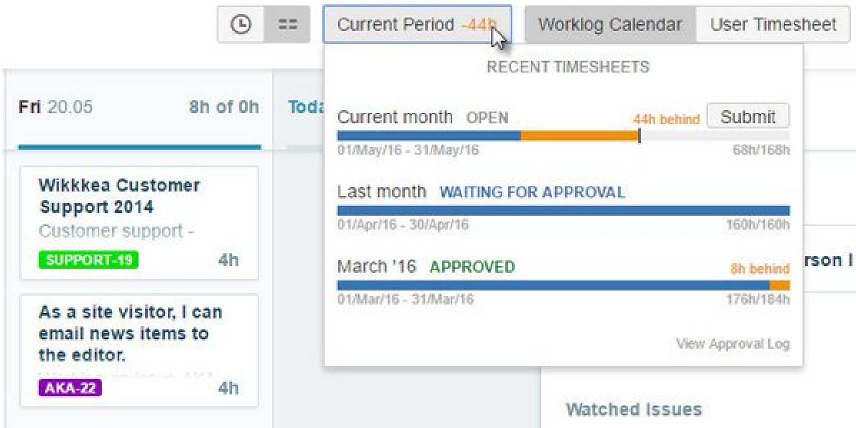
To view your user timesheet status, complete the following steps:

1. Open your worklog calendar by completing the following steps:
   a. On the main menu bar, click **Tempo** > **Timesheets**.
   b. On the second menu bar, click **Worklog Calendar**.
2. To the left of the **Worklog Calendar** button, click **Current Period**, as shown in the following image.



> **Tip**
> If a timesheet is waiting to be submitted, the text on the **Current Period** button changes to a message about submitting the timesheet. You can still view your timesheet status by clicking the small down-arrow on the button.

3. In the RECENT TIMESHEETS window, view the progress bars for the three most recent timesheets. The bars indicate whether the number of hours that you logged is ahead of, or behind, the required work hours.
   If the timesheet approval process is enabled, the timesheet approval status is displayed above each bar.



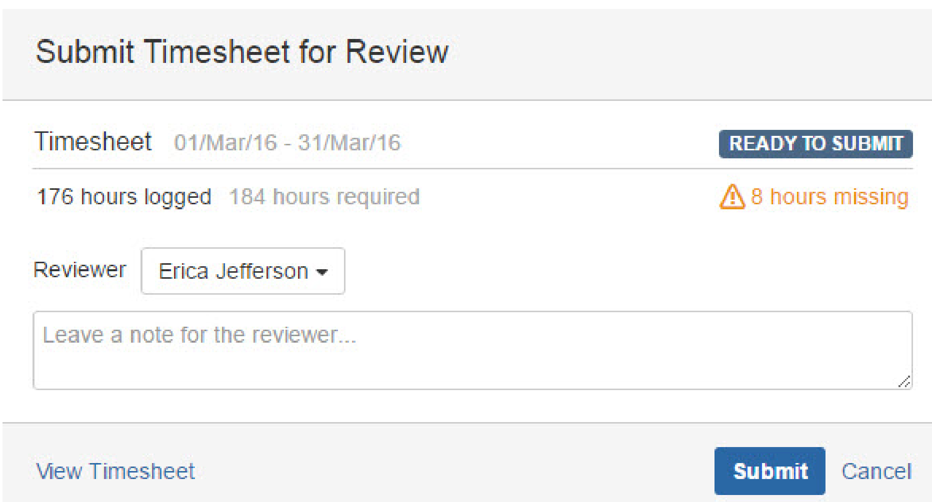
Submitting your timesheet for approval

When your timesheet is ready to be submitted, the text on the **Current Period** button changes to a message about submitting the timesheet.

Procedure

To submit a timesheet for a period, complete the following steps:

1. In the RECENT TIMESHEETS window, above the progress bar for the period, click **Submit**.
2. In the 'Submit Timesheet for Review' window, fill in the requested information, and click **Submit**.



Reports

Each of the Timesheets views has a corresponding report view and list view to provide users and project managers a quick overview of the worklogs status. All the displayed data in these views can be exported to a .xls file.

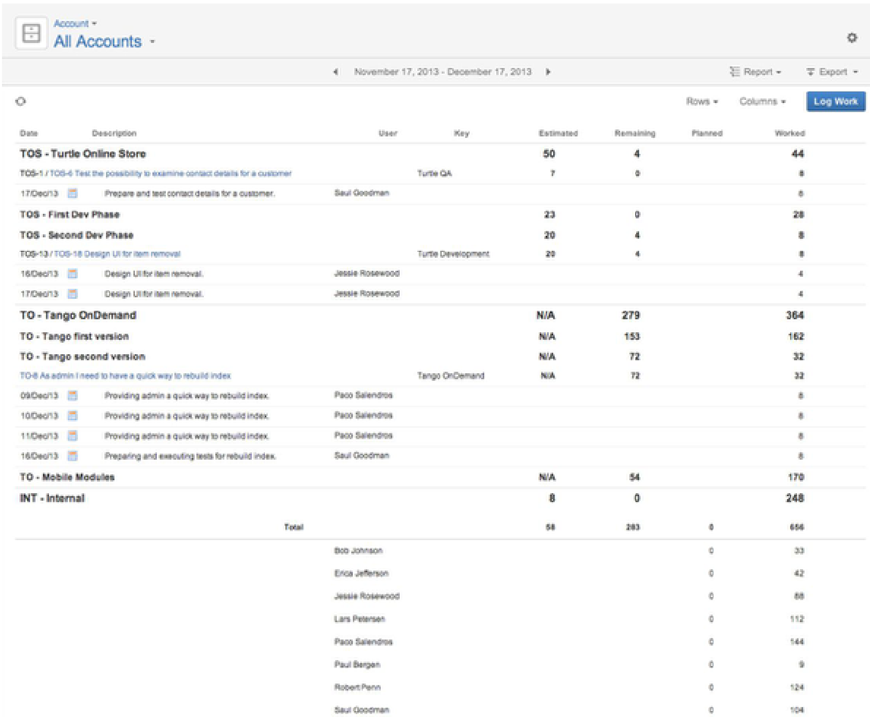
> To see worklogs owned by other users you need to have permissions configured in Tempo Timesheets

On this page

Tempo Report View

This view provides a different focus in displaying Logged Work on JIRA Issues in the selected Timesheet. The main difference is the option to filter by different granularity, e.g. from showing the JIRA Projects down to showing the Worklogs description

The Accounts Timesheet Report View (click to enlarge)


Account ▾
All Accounts ▾
November 17, 2013 - December 17, 2013
Report ▾ Export ▾
Rows ▾ Columns ▾ Log Work

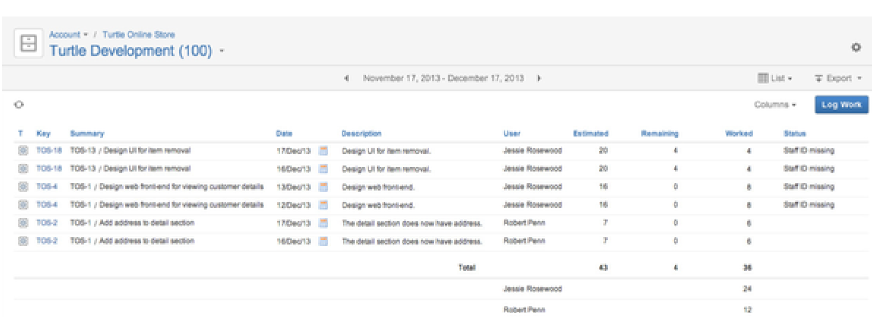
Date	Description	User	Key	Estimated	Remaining	Planned	Worked
TOS - Turtle Online Store				**50**	**4**		**44**
TOS-1 / TOS-6 Test the possibility to examine contact details for a customer			Turtle QA	7	0		8
17/Dec/13	Prepare and test contact details for a customer.	Saul Goodman					8
TOS - First Dev Phase				**23**	**0**		**28**
TOS - Second Dev Phase				**20**	**4**		**8**
TOS-13 / TOS-18 Design UI for item removal			Turtle Development	20	4		8
16/Dec/13	Design UI for item removal.	Jessie Rosewood					4
17/Dec/13	Design UI for item removal.	Jessie Rosewood					4
TO - Tango OnDemand				**N/A**	**279**		**364**
TO - Tango first version				**N/A**	**153**		**162**
TO - Tango second version				**N/A**	**72**		**32**
TO-8 As admin I need to have a quick way to rebuild index			Tango OnDemand	N/A	72		32
09/Dec/13	Providing admin a quick way to rebuild index.	Paco Salendros					8
10/Dec/13	Providing admin a quick way to rebuild index.	Paco Salendros					8
11/Dec/13	Providing admin a quick way to rebuild index.	Paco Salendros					8
16/Dec/13	Preparing and executing tests for rebuild index.	Saul Goodman					8
TO - Mobile Modules				**N/A**	**54**		**170**
INT - Internal				**8**	**0**		**248**
	Total			58	283	0	656
		Bob Johnson				0	33
		Erica Jefferson				0	42
		Jessie Rosewood				0	88
		Lars Petersen				0	112
		Paco Salendros				0	144
		Paul Bergen				0	9
		Robert Penn				0	124
		Saul Goodman				0	104

- Tempo Accounts needs to be in use for the Account Timesheet and its views to be of value.
- The report/list is based on the selected accounts and its attributes.
- Gives the **best report overview** (All Accounts option), if Accounts are set as a Work Attribute and the current user has the Browse Projects Project Permission for **all the JIRA Projects**.
- The **Rows** menu in the **Report View**, gives an options to filter by different granularity, e.g. from showing the JIRA Projects down to showing the Worklogs description.
- All columns in the **List View** are sortable, e.g. click on the column heading to sort the view according to this column.

Tempo List View

This view displays one JIRA Issue per line and gives a good overview of Logged Work on the Issues (with the Description) in the selected Project. All columns in the List view are sortable, e.g. click on the column heading to sort the view according to this column. This is also a good view to edit worklogs.

The Accounts Timesheet List View (click to enlarge)


Account ▾ / Turtle Online Store
Turtle Development (100) ▾
November 17, 2013 - December 17, 2013
List ▾ Export ▾
Columns ▾ Log Work

T	Key	Summary	Date	Description	User	Estimated	Remaining	Worked	Status
	TOS-18	TOS-13 / Design UI for item removal	17/Dec/13	Design UI for item removal.	Jessie Rosewood	20	4	4	Staff ID missing
	TOS-18	TOS-13 / Design UI for item removal	16/Dec/13	Design UI for item removal.	Jessie Rosewood	20	4	4	Staff ID missing
	TOS-4	TOS-1 / Design web front-end for viewing customer details	13/Dec/13	Design web front-end.	Jessie Rosewood	16	0	8	Staff ID missing
	TOS-4	TOS-1 / Design web front-end for viewing customer details	12/Dec/13	Design web front-end.	Jessie Rosewood	16	0	8	Staff ID missing
	TOS-2	TOS-1 / Add address to detail section	17/Dec/13	The detail section does now have address.	Robert Penn	7	0	6	
	TOS-2	TOS-1 / Add address to detail section	16/Dec/13	The detail section does now have address.	Robert Penn	7	0	6	
				Total		43	4	36	
					Jessie Rosewood			24	
					Robert Penn			12	

Other ways to create reports are described in the following blog posts:

- Pivoting Tempo and JIRA Reports using excel
- Creating excel reports using high-level permissions API export

Related topics

- Viewing timesheet in report view
- Viewing timesheet in list view
- Additional rows and columns
- Agile Timesheet
- Timesheet Approval report
- Exporting worklogs as an Excel file
- Exporting account worklogs as a PDF file

Worklogs

On this page

In this chapter

Video

Worklog Permissions

- You can access and use Tempo Timesheets only if you have Work On Issues permission for at least one JIRA project.
- You can log work in Tempo Timesheets only if Time tracking is ON in JIRA.
- If you don't have Work On Issues permission for certain projects, you can view only your own worklogs for those projects.
- If you have 'Log Work for Others' permission for a project, you can log work on behalf of other users who have permission to log work for that project.

Editing Worklogs

Worklogs can be edited according to permission settings in JIRA Project Permissions if issue is editable. There are other restrictions for editing worklogs used in Tempo Timesheets and can be configured according to your needs. The features that may affect worklog editing in Tempo are Period management, Timesheet Approval Process and Tempo Scheduler.

Worklog Properties

A worklog logged in Tempo has the following properties

1. **Owner** - JIRA user who is signed in and and logs work is the owner. Worklog owner can not be changed.
    a. This can be the selected user if Tempo Team leader has a permission to log work for Team members.
2. **Worklog** - Date/Time and Hours worked
3. **Attributes** - Worklog description, Billed hours, Tempo work attributes

Logging Work

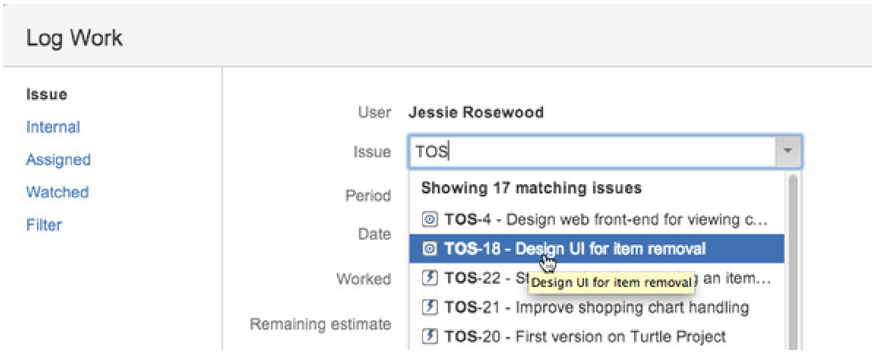
On this page

The core function of Tempo Timesheets is to log work on JIRA issues. Tempo users can log work in Tempo with the following windows and forms.

Log Work Button

The log Work button is displayed in every timesheet view and opens the Tempo Log Work window when clicked. There are several options to find issues in the window that are documented in the Log Work window page and other pages in this chapter.

The Log Work button opens the Log Work window (click to enlarge)



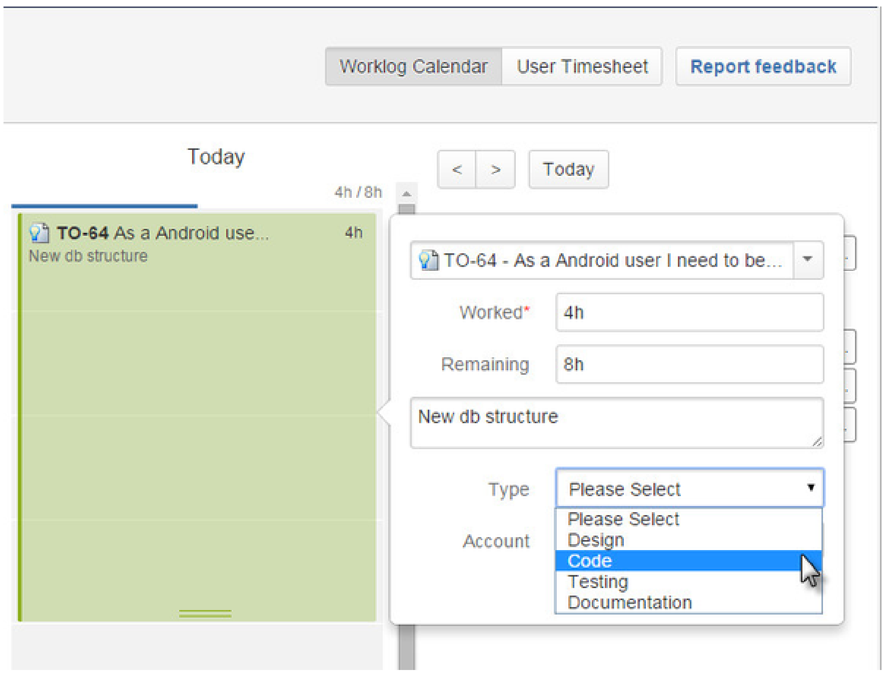
In this chapter

Video

Log Work Form

The *Log Work* form is displayed either by clicking an empty spot on the canvas, by clicking an existing worklog card or by dragging a Suggestion Card onto the canvas in Worklog Calendar.

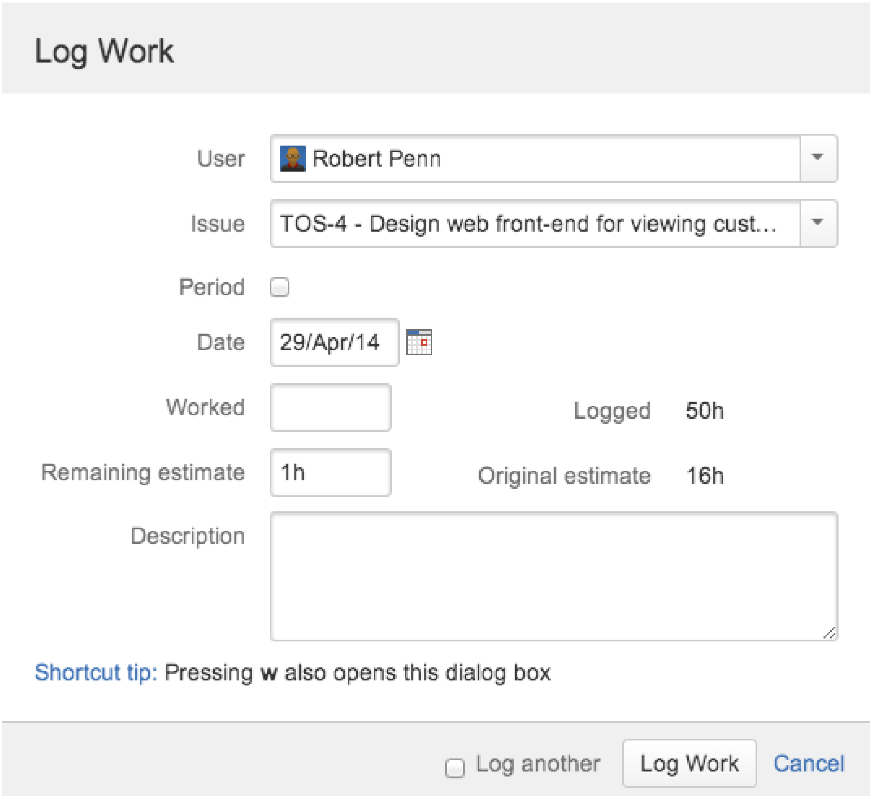
Log Work form with two Tempo work attributes configured



Issue Log Work window

Issue Log Work window is displayed when logging work in issue view or when a cell in Tempo Timesheet view is clicked.

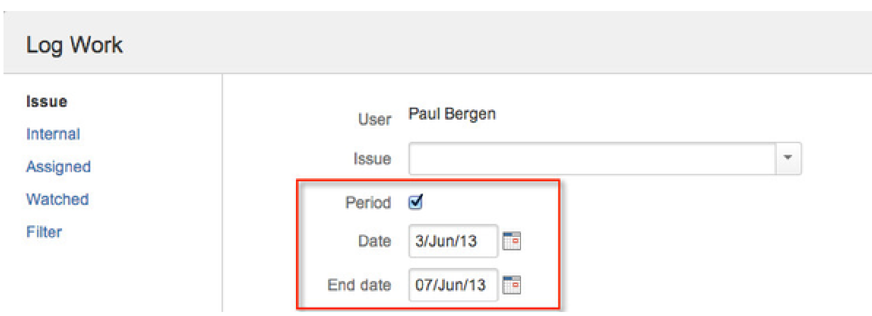
Issue Log Work window viewed by a user who can log work for other users



Log Work for a Period

Tempo user can log work over a period of time in Tempo Log Work windows and by dragging over the cells in Timesheet view.

Period fields in Tempo Log Work window



Logging work by period is not supported in Tempo Log Work form. Period worklog editing and delete is not supported so worklogs needs to be deleted and edited one at a time.

Log Work in Tempo Mobile App for JIRA

In addition to the above methods, you can log work on your cell phone by using the Tempo Mobile App for JIRA, which is available free for iOS and Android.

Log Work window

From any timesheet, you can log the work that you did for a JIRA issue by clicking **Log Work**.

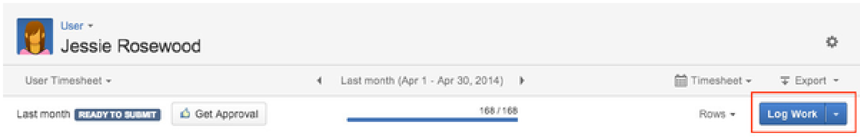
In this chapter

Tutorial

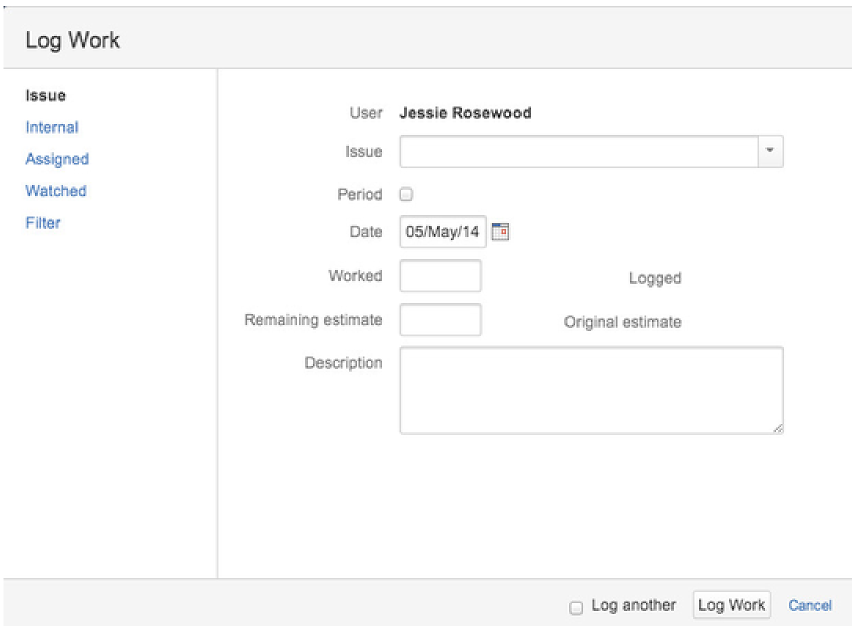
(Video without voiceover. Time: 1:47)

Procedure

1. From any timesheet, in the upper-right corner, click **Log Work**.



2. In the Log Work window, fill in the requested information.



Tips

Field	Tip
User	In the **User** field, you can select a different user if you have Log Work for Others permission.
Issue	In the left column, you can filter the issues that are available in the **Issue** field. You can select Internal, Assigned, Watched or Filter. The left column is *not* displayed if you clicked **Log Work** from the *issue* timesheet because the issue is already selected.

Remaining estimate	The remaining estimate depends on the setting *'Remaining estimate is optional'* in the Tempo global configuration: • If that setting is selected, and the issue does *not* have an original estimate, the remaining estimate is not calculated. • If that setting is selected, and the issue has an original estimate, the remaining estimate is reduced by the time that is logged until the remaining estimate is 0, in which case you can increase the remaining estimate. The remaining estimate cannot be a negative number.
Description	A description is optional if the setting '*Worklog description is optional*' is selected in the Tempo global configuration.
Extra fields	The window might contain extra fields if Tempo work attributes are configured.

3. If you plan to log more work immediately after you log this work, at the bottom of the window, select **Log another**.

4. Click **Log Work**.

Logging work on internal issues

You can log time that is spent on vacation or sick leave, or for general work like staff meetings, to *internal* issues. A remaining estimate is not required for internal issues.

Required permission

Depending on where you log work on an internal issue, you require different permission for the JIRA project that the issue belongs to:

- On any timesheet, you require Work On Issues permission for the project
- On the worklog calendar, you require Browse Projects permission and Work On Issues permission for the project

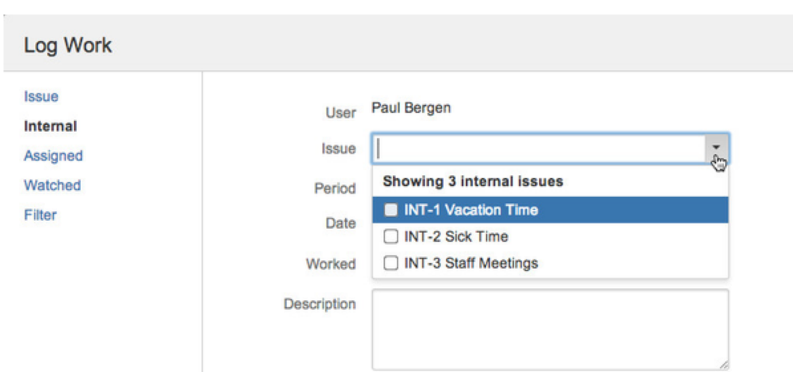
Procedure

To log work on an internal issue, from any timesheet, complete the following steps:

1. On the timesheet, in the upper-right corner, click **Log Work**.

2. In the Log Work window, in the left column, click **Internal**.

The Log Work window, showing the Internal option in the left sidebar (click to enlarge)



3. Fill in the requested information.

In this chapter

Video

Logging and editing work

Vacation planning

Tips

Field	Tip
Period	If you select the **Period** checkbox, an **End date** field for the time period is displayed.
Worked	The number of hours that the user worked on the issue.
Description	A description is optional if the **Worklog description is optional** checkbox is selected in the Tempo global configuration .

4. If you plan to log more work immediately after you log this work, at the bottom of the window, select **Log another**.

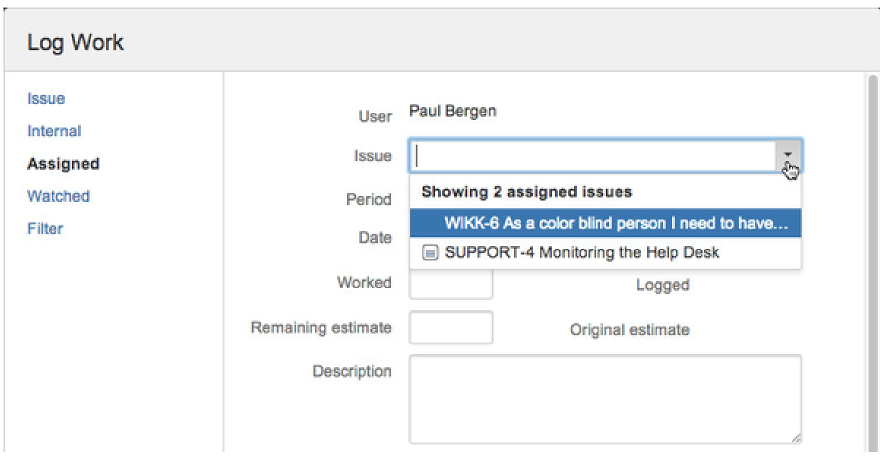
5. Click **Log Work**.

Filtering assigned issues

You can quickly search for issues that are assigned to you and log work on an issue.

In this chapter

*The Log Work window, showing the **Assigned** option in the left sidebar (click to enlarge)*



Procedure

1. From any timesheet, in the upper-right corner, click **Log Work**.

2. In the Log Work window, in the left column, click **Assigned**.

3. Fill in the requested information.

Tips

Field	Tip
Period	If you select the **Period** checkbox, an **End date** field for the time period is displayed.
Worked	The number of hours that the user worked on the issue.

Remaining estimate	The remaining estimate depends on the setting *'Remaining estimate is optional'* in the Tempo global configuration: • If that setting is selected, and the issue does *not* have an original estimate, the remaining estimate is not calculated. • If that setting is selected, and the issue has an original estimate, the remaining estimate is reduced by the time that is logged until the remaining estimate is 0, in which case you can increase the remaining estimate. The remaining estimate cannot be a negative number.
Description	A description is optional if the **Worklog description is optional** checkbox is selected in the Tempo global configuration.

4. If you plan to log more work immediately after you log this work, at the bottom of the window, select **Log another**.

5. Click **Log Work**.

Filtering watched issues

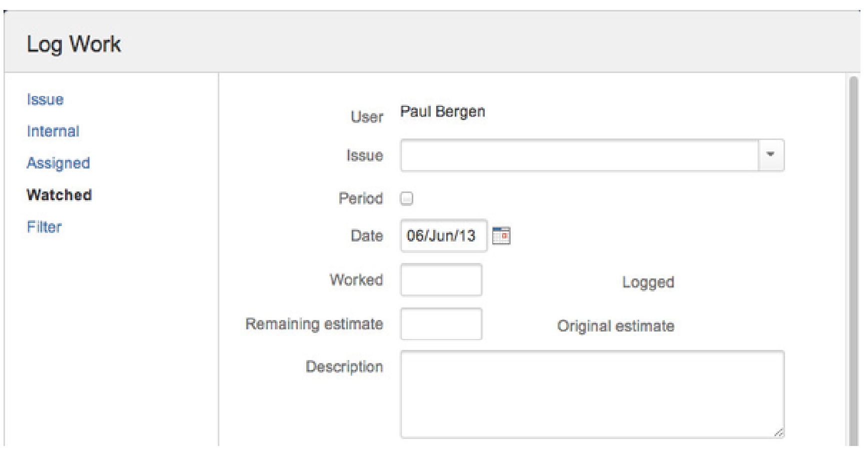
You can quickly search for issues that you are watching and log work on an issue.

In this chapter

Procedure

1. From any timesheet, in the upper-right corner, click **Log Work**.

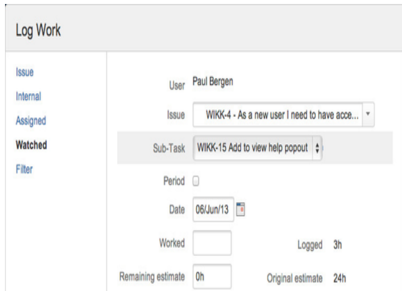
2. In the Log Work window, in the left column, click **Watched**.



3. Fill in the requested information.

Tips

Field	Tip

Issue	If the selected issue has sub-tasks, a **Sub-Task** field is displayed. Work is logged on the issue or on a sub-task, depending on which of the fields is active. You can recognize the active field by the gray shading in the field row. For example, in the following example, the sub-task (and not the issue) is active: 
Period	If you select the **Period** checkbox, an **End date** field for the time period is displayed.
Worked	The number of hours that the user worked on the issue.
Remaining estimate	The remaining estimate depends on the setting *'Remaining estimate is optional'* in the Tempo global configuration: • If that setting is selected, and the issue does *not* have an original estimate, the remaining estimate is not calculated. • If that setting is selected, and the issue has an original estimate, the remaining estimate is reduced by the time that is logged until the remaining estimate is 0, in which case you can increase the remaining estimate. The remaining estimate cannot be a negative number.
Description	A description is optional if the **Worklog description is optional** checkbox is selected in the Tempo global configuration.

4. If you plan to log more work immediately after you log this work, at the bottom of the window, select **Log another**.

5. Click **Log Work**.

Selecting issues from JIRA filters

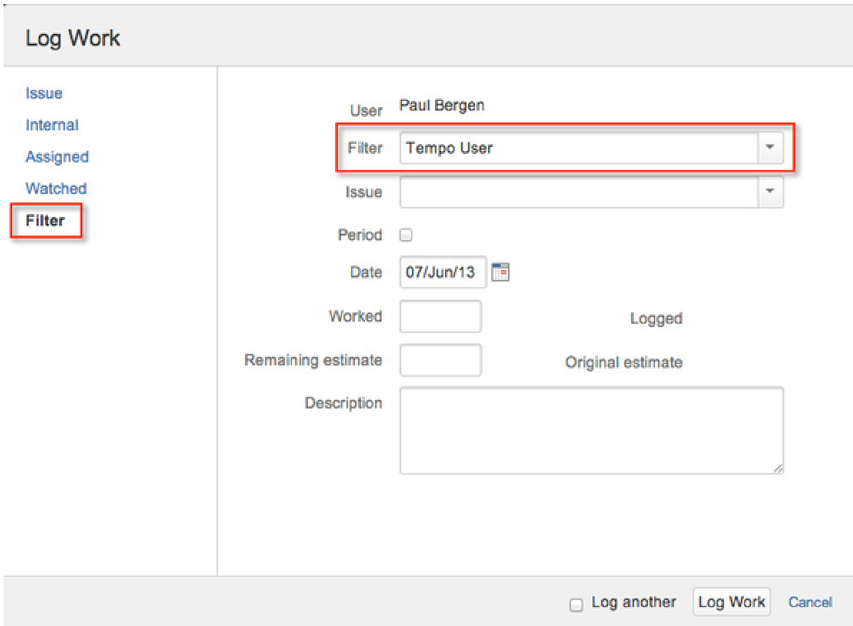
You can find issues quickly from any JIRA filter that you may view and which you added to your favorites.

In this chapter

Procedure

1. From any timesheet, in the upper-right corner, click **Log Work**.

2. In the Log Work window, in the left column, click **Filter**.



3. Fill in the requested information.

   Tips

Field	Tip
Period	If you select the **Period** checkbox, an **End date** field for the time period is displayed.
Worked	The number of hours that the user worked on the issue.
Remaining estimate	The remaining estimate depends on the setting *'Remaining estimate is optional'* in the Tempo global configuration: • If that setting is selected, and the issue does *not* have an original estimate, the remaining estimate is not calculated. • If that setting is selected, and the issue has an original estimate, the remaining estimate is reduced by the time that is logged until the remaining estimate is 0, in which case you can increase the remaining estimate. The remaining estimate cannot be a negative number.
Description	A description is optional if the **Worklog description is optional** checkbox is selected in the Tempo global configuration.

4. If you plan to log more work immediately after you log this work, at the bottom of the window, select **Log another**.

5. Click **Log Work**.

Issue Log Work window

The issue log work window is different from the Tempo Log work window as the JIRA issue is pre-selected and the left sidebar is not displayed. This log work window is accessible from a timesheet cell and from the JIRA issue view.

Timesheet Cell

Time can be logged on issues from a timesheet cell, given the issue is displayed in the timesheet, either because time has been logged on it before or because of a selected filter.

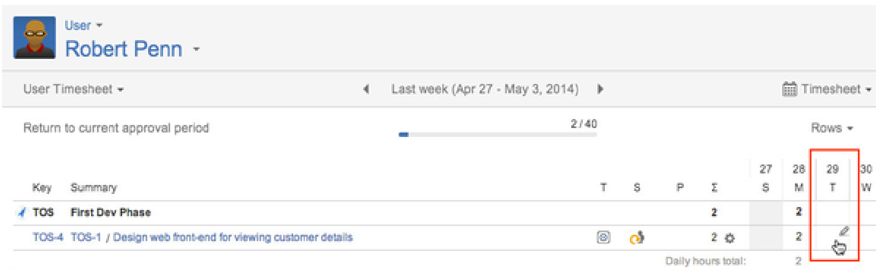
Tutorial

(Video without voiceover. Time: 0:41)

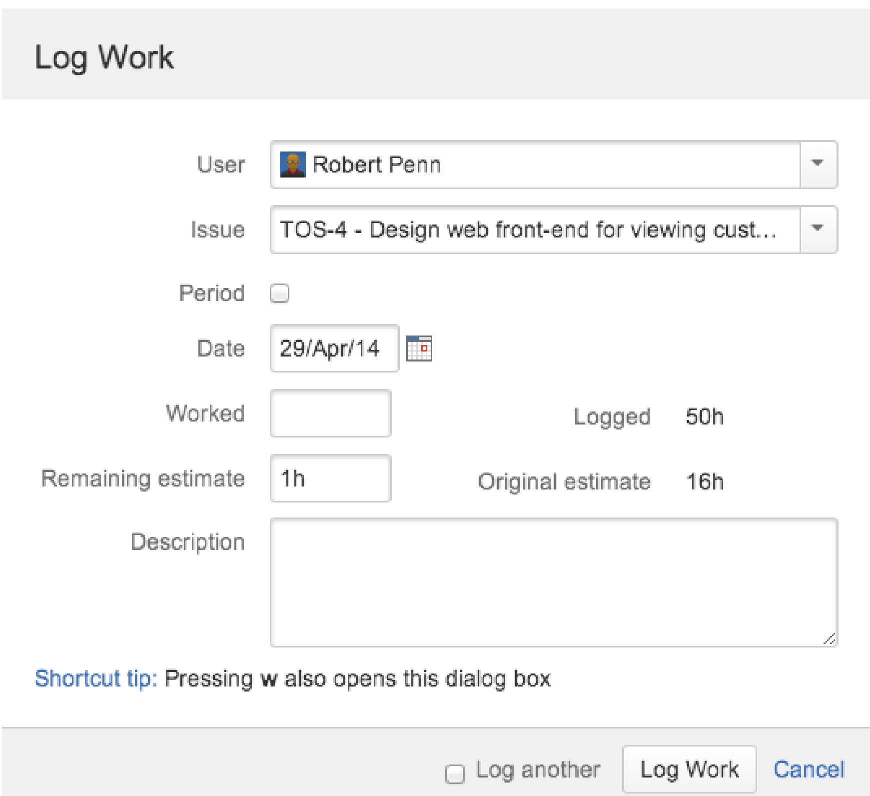
This can be done in the User, Issue, and Advanced Timesheets.

To log work from a timesheet cell, click on a day for the issue you want to log work on and a Log Work window with the issue pre-selected in the issue picker is opened.

Click on a cell for an issue in the timesheet to log work (click to enlarge)



Issue Log Work window (click to enlarge)



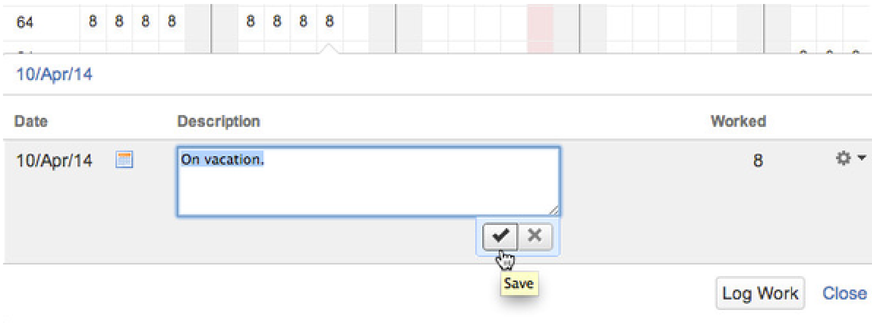
In this version of the window you only have to fill out **Worked** hours, **Remaining estimate** if required and give a brief **Description**.

Already logged work can be edited in-line in the timesheet. The timesheet in-line window looks as in the screenshot below, where you simply click on the items you want to edit, given the period is open. You can also click the Log Work button in the in-line window to add a new worklog.

On this page

In this chapter

The timesheet in-line log work window (click to enlarge)



JIRA Issue View

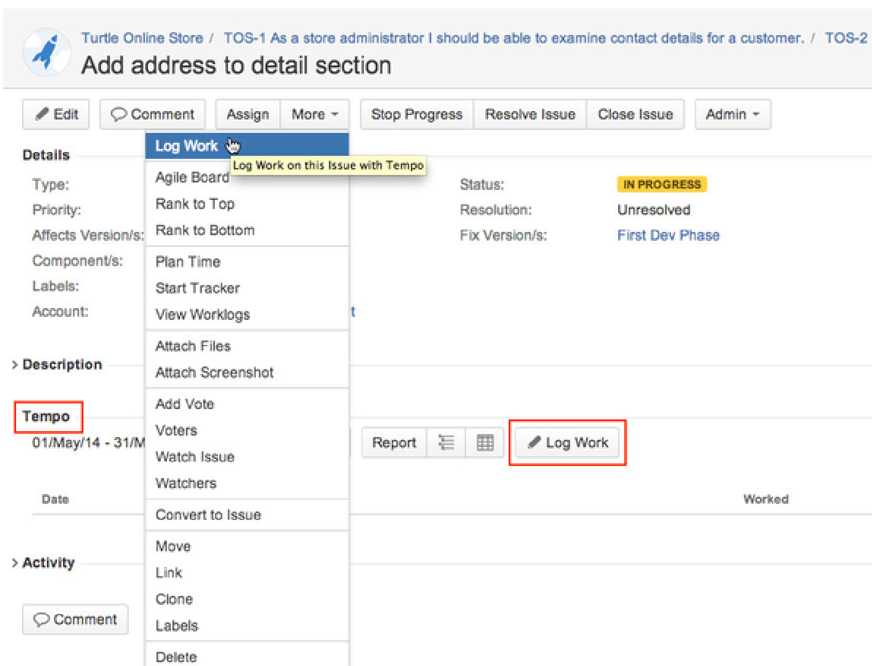
It is also possible to log work on a specific issue in it's JIRA Issue view, along with editing worklogs, given it is within an open period.

Tutorial

(Video with voiceover. Time: 0:38)

The JIRA Issue view has a Tempo panel as in the screenshot below.

The JIRA Issue view with Tempo panel (click to enlarge)



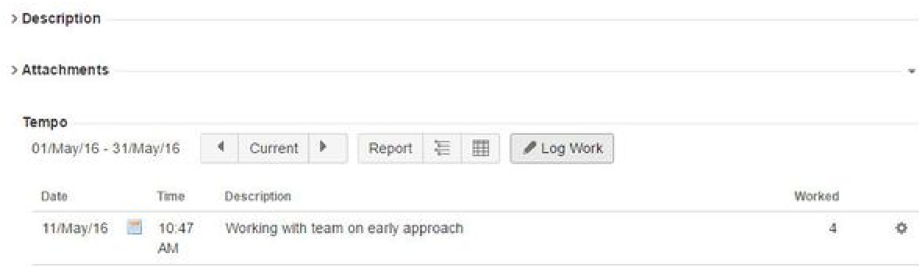
If the JIRA log work module is enabled, users can log work through it, from the **More** actions list. To avoid confusion and if you are using Tempo Timesheets with it's Log Work window and worklog validations, we recommend disabling the JIRA log work module.

Viewing worklogs on a JIRA Issue screen

Details of the work that you logged to an issue are displayed on the JIRA Issue screen. You can view other users' worklogs for the issue by displaying the issue report. Worklog totals are also displayed on the JIRA Issue screen.

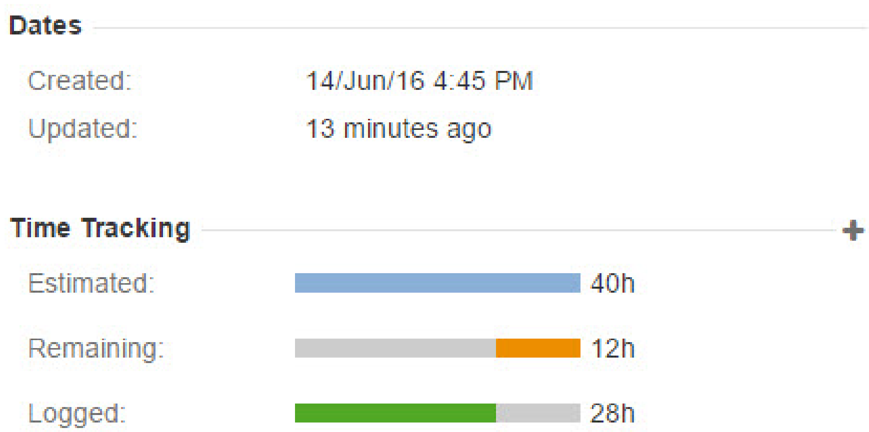
The Tempo section of the JIRA Issue screen

If you have access to Tempo Timesheets, the **Tempo** section is displayed on the JIRA Issue screen. Your worklogs for the selected period are listed, and you can navigate between periods. If you have View All Worklogs permission for projects, you can view other users' worklogs by clicking one of the **Report** icons: The left icon opens the report with worklogs sorted by user; the right icon opens the report as a sortable table.



The Time Tracking section

On the JIRA Issue screen, in the **Time Tracking** section, the **Logged** bar indicates the total time that was logged on the issue. You can log work on the issue by clicking the plus sign and filling in the information in the Log Work window**.**



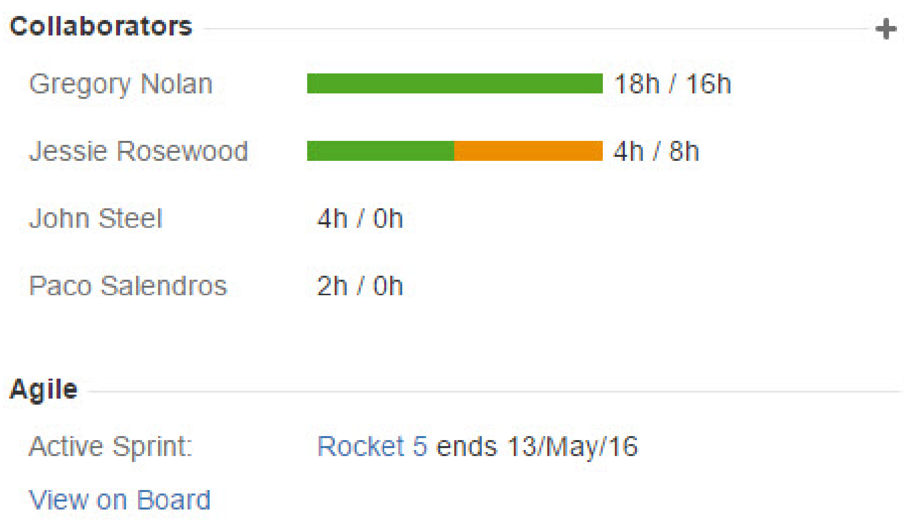
The Collaborators section

The **Collaborators** section is displayed if the following checkbox is selected in Tempo Global Configuration:
'**Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets.**'

You can plan time for work on the issue by clicking the plus sign and filling in the requested information in the Plan Time window.

On this page

In this chapter



If you don't have permission to view all worklogs and plans in the project, only your data is displayed.

Related topics

- Granting permission to users
- Planning in JIRA issue view

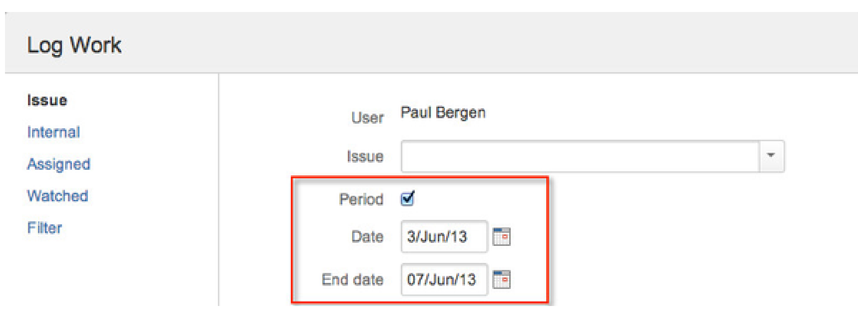
Logging work over a period of time

In this chapter

Procedure

To log work over a period of time, complete the following steps:

1. From any timesheet, in the upper-right corner, click **Log Work**.
2. In the Log Work window, select the **Period** check box so that the **End date** field is displayed

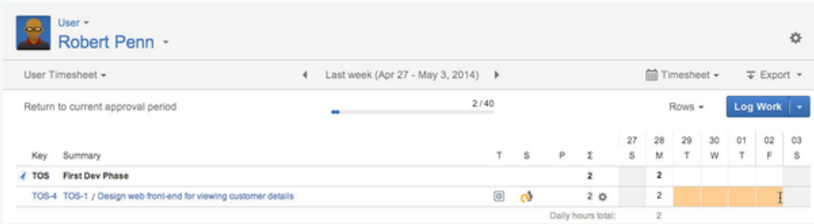


3. Fill in the requested information, and click **Log Work**.

   Work is logged for the days that are included in the period, except for weekends and public holidays.

Tip
Alternatively, you can log work over a period by completing the following steps:

1. On a user timesheet or an issue timesheet, drag the mouse over the timesheet cells that you want to log work in. In the following example, cells for four days are selected.

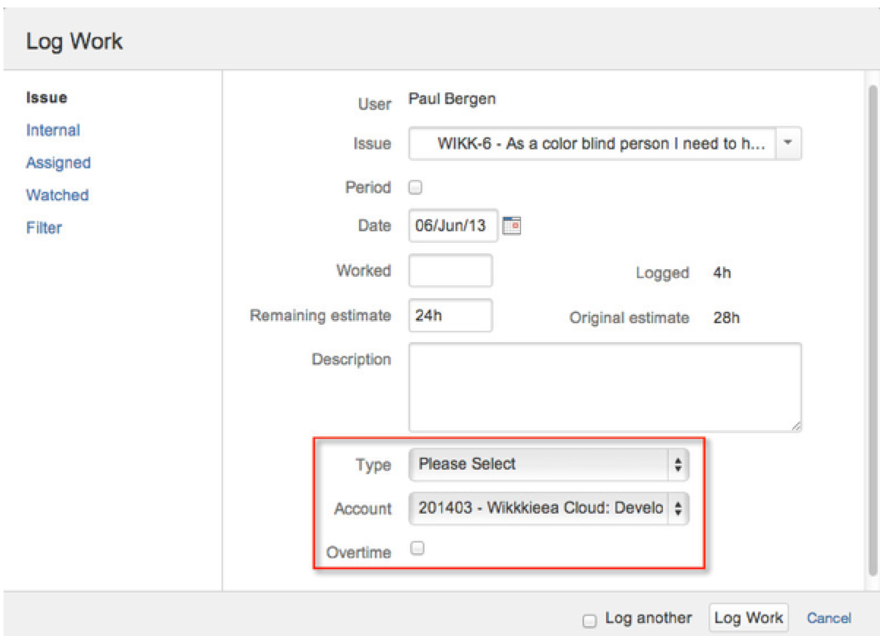


2. In the Log Work window, select the Period check box, and fill in the requested information.
3. Click **Log Work**.

Logging work with work attributes

It is possible to configure some additional Work Attributes, which are displayed when logging work in Tempo Timesheets.

The Log Work window showing 3 Work Attributes (click to enlarge)



Editing a work log entry

Worklogs can be edited in Tempo Timesheets if user has the required permission and the worklog is within a period that is open for editing. The Troubleshooting worklog editing page lists permissions and Tempo validation for editable worklogs.

Required permission

You require the following permission to perform the tasks that are listed on this page:

Task	Your own worklogs	Other users' worklogs

In this chapter

On this page

In this chapter

Editing worklogs	Edit Own Worklogs permission in projects	• View All Worklogs permission in projects • Edit All Worklogs permission in projects • Log Work for Others permission in projects
Deleting worklogs	Delete Own Worklogs permission in projects	• View All Worklogs permission in projects • Delete All Worklogs permission in projects • Log Work for Others permission in projects
Moving worklogs	• Delete Own Worklogs permission in projects • Work on Issues permission in projects	• View All Worklogs permission in projects • Delete All Worklogs permission in projects • Log Work for Others permission in projects • Work On issues permission in projects
Splitting worklogs	• Edit Own Worklogs permission in projects • Work on Issues permission in projects	• View All Worklogs permission in projects • Edit All Worklogs permission in projects • Log Work for Others permission in projects • Work On issues permission in projects

Related topics

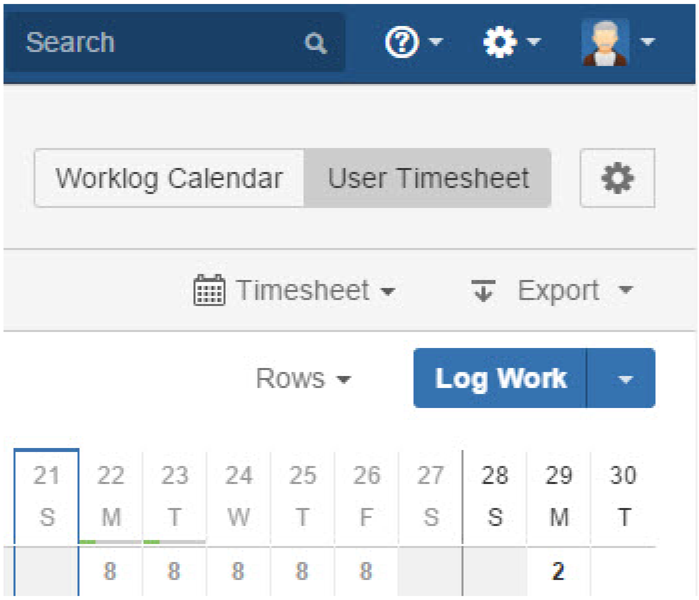
- Managing project permissions (JIRA documentation)
- Granting permission to users

Report Views

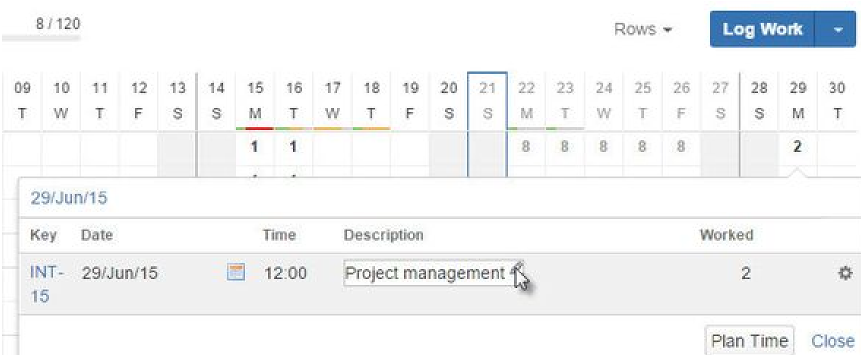
In the Tempo Report and List view you will get an overview of all worklogs that you have permission to view for the selected timesheet. Hover over the worklog and if editable the inline editing field will be displayed.

Timesheets Views

You can view by the display of date header if the Timesheet is within an editable period as the dates that are not editable are grayed out.



To edit a worklog in Timesheet view click the cell to open the Tempo In-line editing window.



Move and Split Worklogs

If a worklog is within an editable period and user has all the required permissions the options to **Move**, **Split** and **Delete** worklog are displayed in the worklog action list. See Moving and splitting work log entry page for more details.

Delete Worklogs

If the Delete option is displayed in the worklog action list the user can delete worklogs.

Editing work log entry in-line

This is a child page of Editing a work log entry, explaining the In-line Edit window. This is beneficial to do corrections to previously Logged Work, but those corrections can also be done in the report view and list view for each timesheet.

In this chapter

Required permission

To edit your own worklogs	To edit other users' worklogs

Edit Own Worklogs permission in projects	• View All Worklogs permission in projects • Edit All Worklogs permission in projects • Log Work for Others permission in projects

Related topics

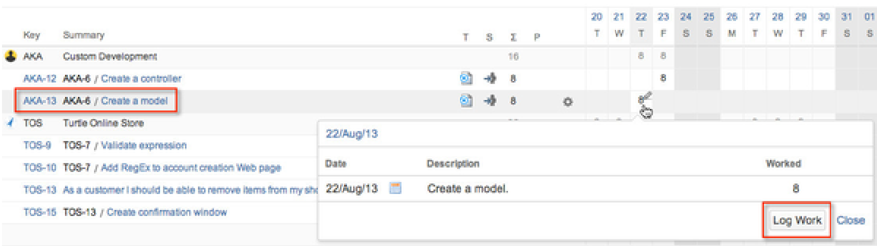
- Managing project permissions (JIRA documentation)
- Granting permission to users

Tutorial

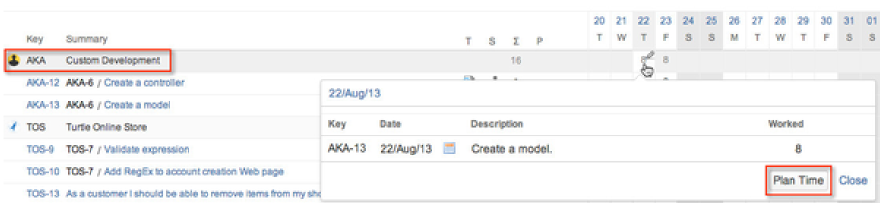
(Video without voiceover. Time: 0:37)

The In-line Edit window varies a little bit depending on if it is opened from an **Activity** (JIRA Projects, Versions and/or Components) timesheet cell or an **Issue** timesheet cell. If it is opened from an Issue cell, the **Log Work** button is shown, but if it is opened from an Activity cell, the **Plan Time** button is shown. The Log Work and Plan Time buttons open the respective windows. The **Cl ose** link, closes the In-line Edit window.

The In-line Edit window opened from an Issue cell - the Log Work button is displayed (click to enlarge)



The In-line Edit window opened from an Activity cell - the Plan Time button is displayed

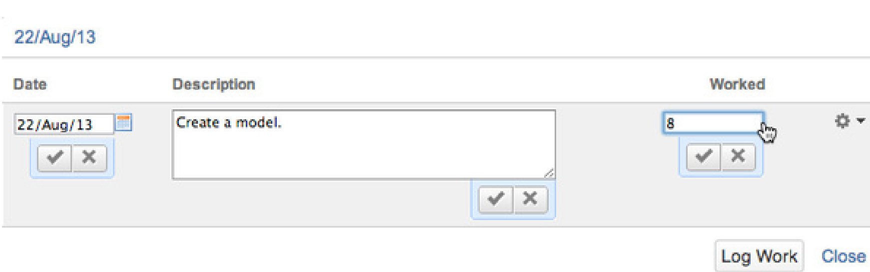


The Plan Time button is displayed only if the following check box is selected in Tempo Global Configuration:
'**Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets.**'

The In-line Edit window can be opened in all timesheets except Account Timesheet

Date, Description and Worked are the fields that can be edited in the In-line Edit window. To do the editing, hover over and click on the field you want to edit. Type in the changes and use the **Save** ic on to save the changes or the **Cancel** icon to keep the original value.

The In-line Edit window

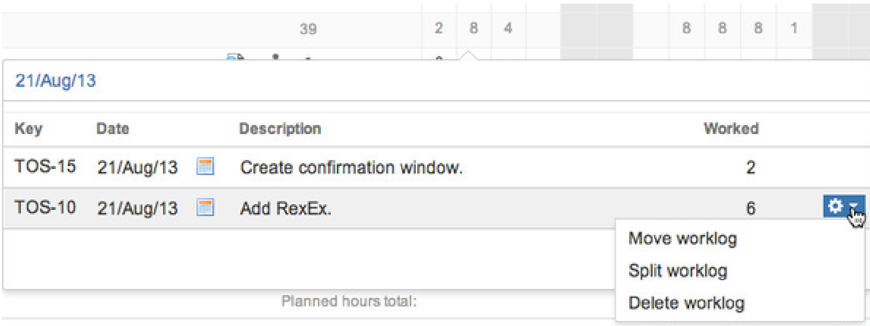


An In-line Edit window may have more than one entry, if work has been logged on more than one Issue on the same day.

The In-line Edit window can also be opened (with multiple entries) by clicking on the day of the month (top row in the timeheet).

Each entry has three actions available in its **Actions** menu, e.g. **Move**, **Split** and **Delete** worklog.

An In-line Edit window showing two worklogs on the same day and the Actions menu for one of them



Moving and splitting work log entry

In the worklog action list you can **Move**, **Split** and **Delete** worklog if the worklog is editable.

In this chapter

Required permission

Task	Your own worklogs	Other users' worklogs
Moving worklogs	• Delete Own Worklogs permission in projects • Work on Issues permission in projects	• View All Worklogs permission in projects • Delete All Worklogs permission in projects • Log Work for Others per mission in projects • Work On issues permission in projects
Splitting worklogs	• Edit Own Worklogs permission in projects • Work on Issues permission in projects	• View All Worklogs permission in projects • Edit All Worklogs permission in projects • Log Work for Others per mission in projects • Work On issues permission in projects

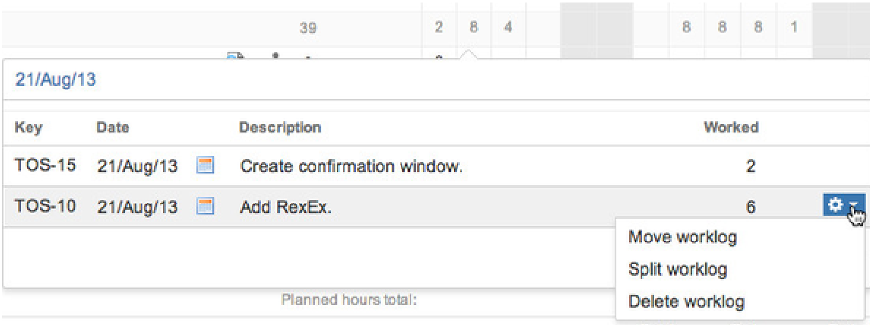
Related topics

- Managing project permissions (JIRA documentation)
- Granting permission to users

List of actions

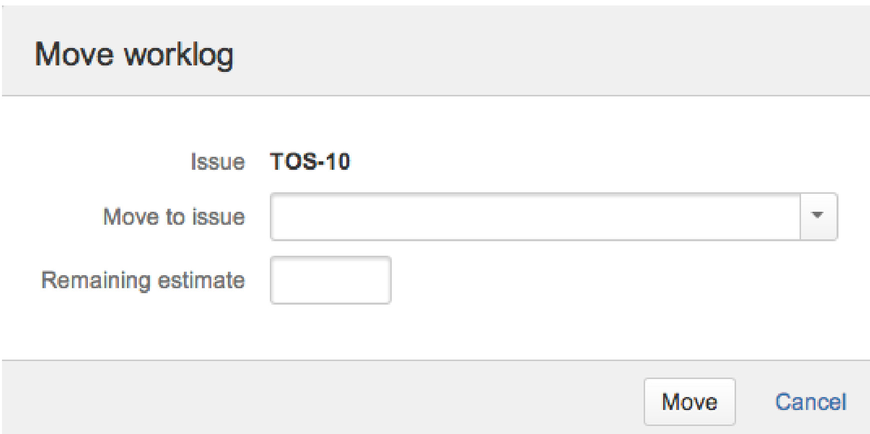
If a worklog is within an editable period and you have all the required permissions, the options to **M ove**, **Split** and **Delete** worklogs are displayed in the worklog action list.

An In-line Edit window showing two worklogs on the same day and the Actions menu for one of them

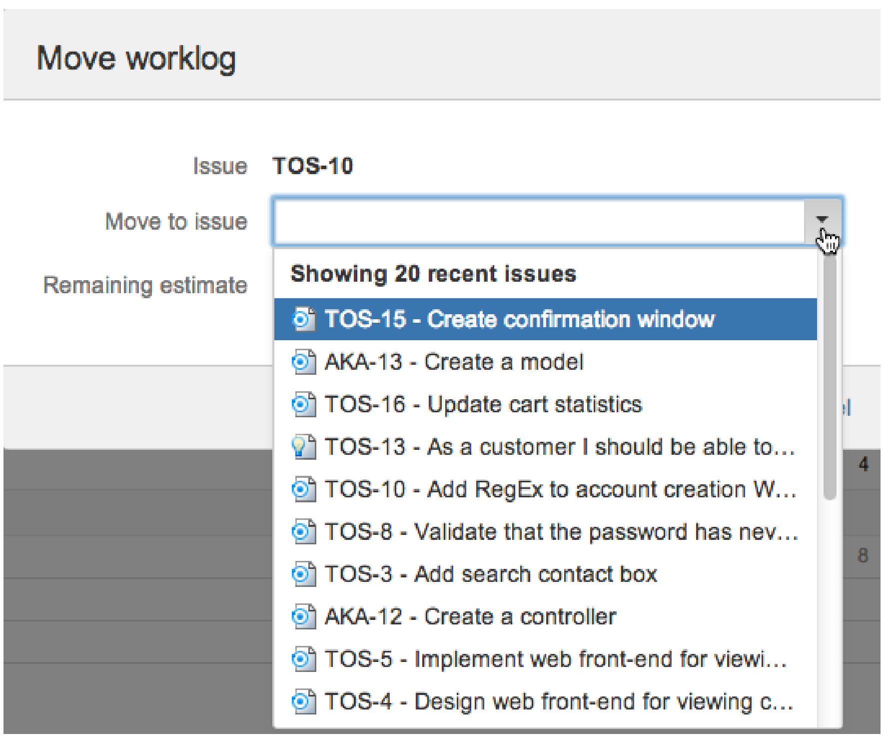


Move Worklog

Selecting the **Move worklog** action, opens the Move worklog window where you can move the worklog to another JIRA issue.



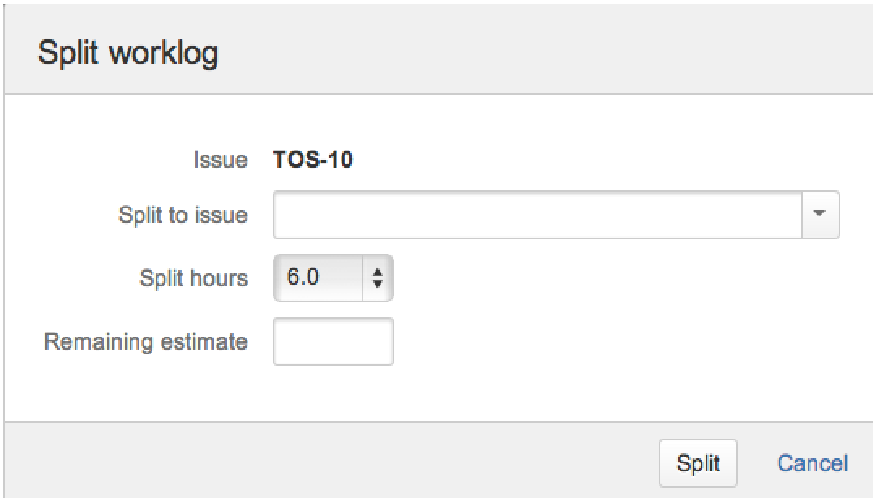
Open the **Move to issue** drop-down to select a new Issue (or start writing to narrow the search)



Select an issue and *click the **Move** button to save the changes or **Cancel** link to keep the original value.*

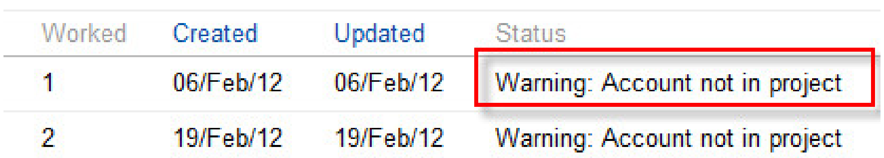
Split Worklog

Selecting the **Split worklog** action, opens the Split worklog window. Open the **Split to issue** drop-down to select a new Issue (or start writing to narrow the search) and click the **Split** button to save the changes or **Cancel** link to keep the original value.



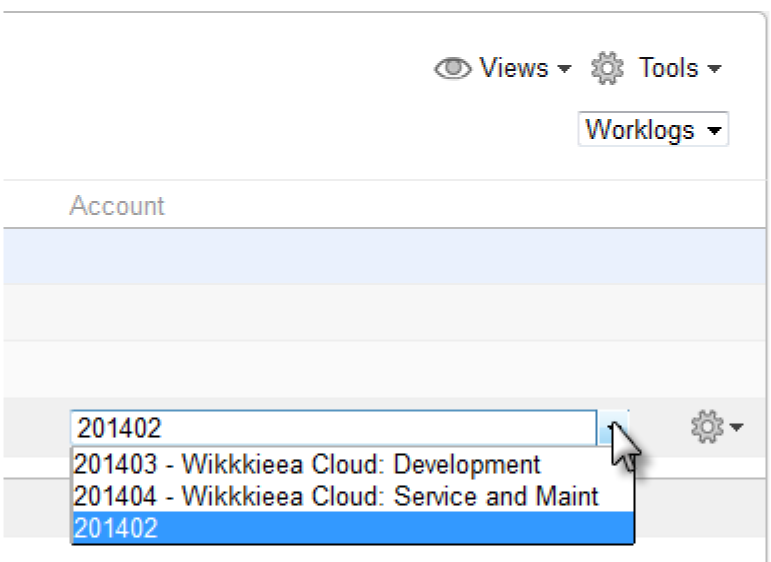
Correcting an account mismatch

Worklogs might contain an **Account** field, through which the worklogs can be directly linked to an account. When you move or split a worklog, you might cause the worklog to be associated with an issue in a project that is not linked to the worklog's account. In such a case, where worklog account and project account do not match, the worklog is listed on the invalid worklogs page.



Worked	Created	Updated	Status
1	06/Feb/12	06/Feb/12	Warning: Account not in project
2	19/Feb/12	19/Feb/12	Warning: Account not in project

You can make the worklog valid by linking the project to the same account or by editing the worklog in any report.

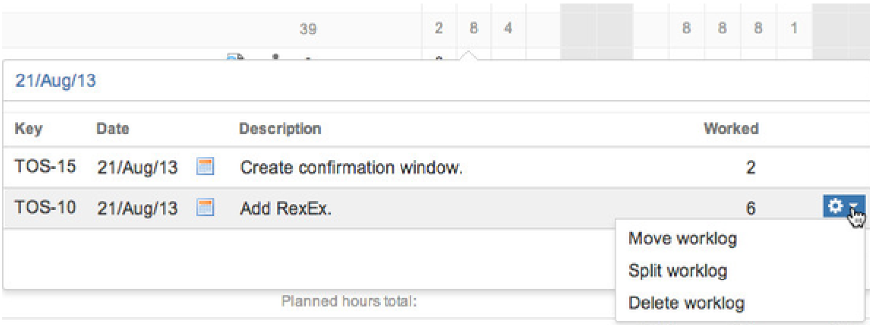


In reports, you can identify invalid worklogs, which are listed with an account key but without an account name.

Deleting work log entry

If a worklog is within an editable period and you have all the required permissions, the options to **Move**, **Split** and **Delete** worklogs are displayed in the worklog action list.

An In-line Edit window showing two worklogs on the same day and the Actions menu for one of them



Required permission

To delete your own worklogs	To delete other users' worklogs
Delete Own Worklogs permission in projects	• View All Worklogs permission in projects • Delete All Worklogs permission in projects • Log Work for Others permission in projects

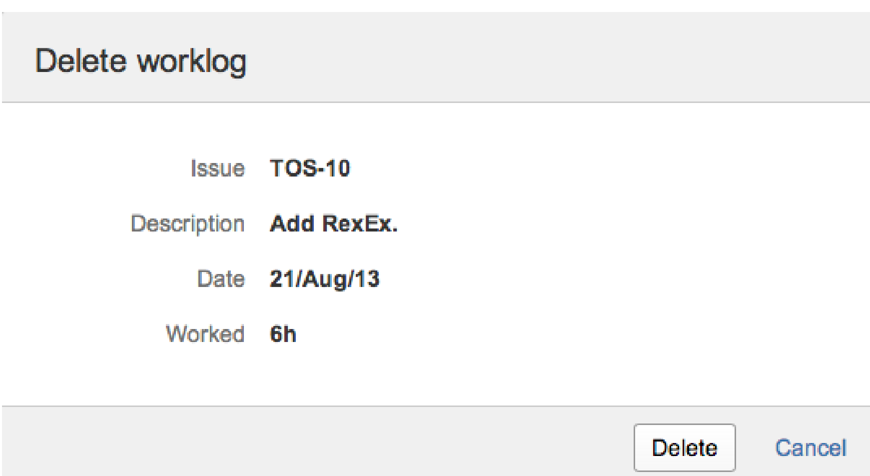
Related topics

- Managing project permissions (JIRA documentation)
- Granting permission to users

Procedure

To delete a worklog, complete the following steps:

1. On the timesheet, click the cell that contains the worklog's hours.
2. In the worklog window, hover over the line that you want to delete.
3. On the right end of the line, click the **cogwheel icon** > **Delete worklog**.
4. In the 'Delete worklog' window, click **Delete**.



Who can edit worklogs and when

Permission to edit worklogs depends on the following settings:

In this chapter

- Project permissions
- Period management status
- Scheduled closing times
- Account approval and timesheet workflow statuses

In this chapter

Project permissions

See Editing a work log entry for information about how project permissions relate to worklog editing.

Period management status

Period management status		Who can edit worklogs?	
for team member	for users with Approve Timesheet permission	Team member	Team lead and other users with Approve Timesheet permission
Open	Open	(except for restrictions that are imposed by Tempo scheduler. See the following table.)	
Closed	Open		
Closed	Closed		

Scheduled closing times

Editing time	Who can edit the worklogs that are before the closing time?	
	Team member	Team lead and other users with Approve Timesheet permission
Before the Tempo-scheduler closing time		
After the Tempo-scheduler closing time		
During a grace period that the team lead grants		
After the grace period		

Account approval and timesheet workflow statuses

Account approval status	Timesheet approval workflow status	Who can edit worklogs?	
		Team member	Team lead and other users with Approve Timesheet permission

NOT APPROVED	OPEN		
	READY TO SUBMIT		
	WAITING FOR APPROVAL		
	APPROVED		(After a timesheet is approved, the team lead can edit only the worklog description, billed hours, and other Tempo work attributes.)
APPROVED	*Any status*		

Time Planning

In this chapter

The time planning functionality makes it possible for users to plan time on **Issues** or **Activities**.

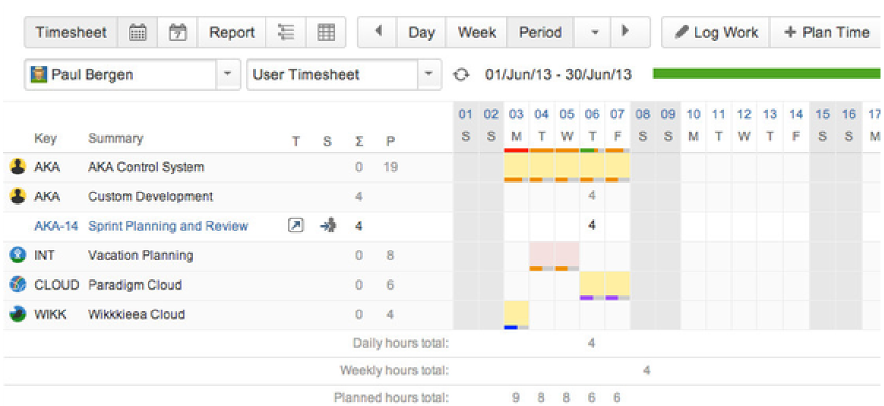
Activities refers to a JIRA project, it's *version* or *component*.

Required permission: Team members can plan time for themselves to work on issues. Team leads and other users who have Plan Time permission for the team can plan time for all members of the team. See also the information about Plan Time permission on the following page: Granting permission to users.

The planned time is displayed in all timesheet views and in Planned Time dashboard gadgets. The time planning feature helps both team leads and their team members to get an overview of planned time and can aid in logging work.

Planned time is displayed with background colors and bars in timesheet grid view, shown in the screenshot below. The User timesheet displays planned work for each user while Team Timesheet shows a schedule for the entire team across multiple projects. The Project Timesheet gives an overview of which users are planned to work on the project in a given period, broken down by **Acti vity**.

Team Lead John has planned time for team member Paul



The details of the color coding in the screenshot above is as follows:

- John has planned time on Paul in one version of the AKA project, that sums up to 19 hours.
- He has also logged 4 hours in another version of the AKA project.
- 8 hours are planned for take two half vacation days, through the INT project.
- 6 hours are planned on the CLOUD project and 4 on the WIKK project.
- The normal planning colour is **orange** for the bars and cell background is light yellow-orange.
  Depending on how many hours are planned the length of the bar is displayed as the

closest ratio to 25, 50, 75 or 100%
- Paul is over allocated on Monday 3rd of June, e.g. he is only required to work 8 hours according to his Workload Scheme. This means the bar becomes **red** for this day.
- His logged hours are displayed with a **green** coloured bar.
  Since he has only finished 4 out of 8 required hours, the bar is only covering 50% of the cell length. Once the planned hours have been logged, only the green bar is displayed.
- The planned vacation is done on the INT project, which is an Internal Activity and the background is light red instead of light yellow-orange.
- The planning bars for the CLOUD and WIKK projects are displayed in **purple** and **blue** respectively. This means that the colours have been configured differently on the Project Administration page.

Plan Time window

On this page

In this chapter

This page explains the **Plan Time** window for Time Planning. The window is opened by clicking the *Plan Time* button in the timesheet sub-header navigation or on any other screen where it is present.

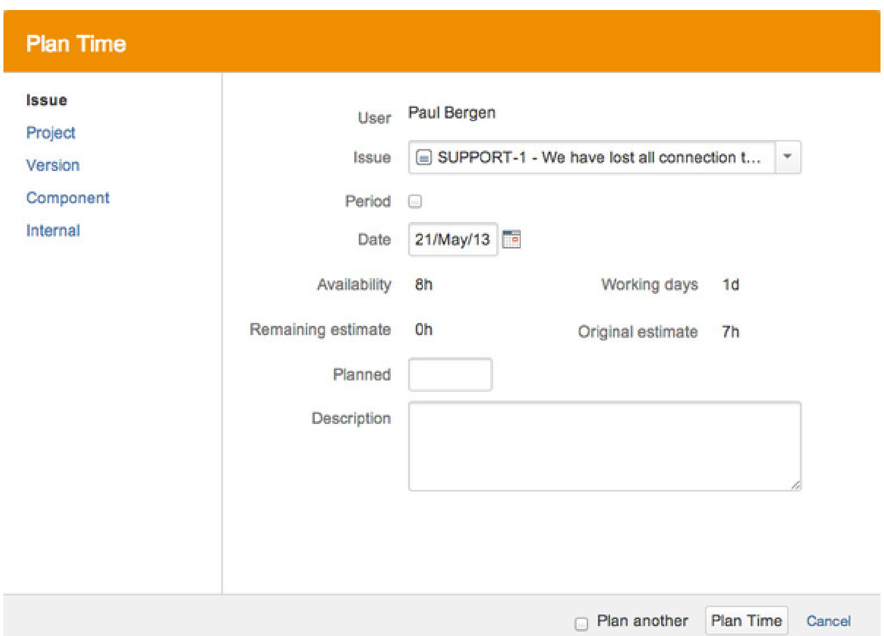
The Plan Time button in the timesheet sub-header navigation (click to enlarge)

The Plan Time window has an orange header to differentiate it from the Log Work window. The left sidebar has default the options *Issue* and activities *Project*, *Version* and *Component*. If an Internal Activity has been configured the *Internal* tab becomes available.

Plan on Issue

The first option for planning is Issue where you can plan time on a JIRA issue. The *User* field lists users who you can plan time for. You can plan time for users who are in teams in which you are the team lead or for which you have Plan Time permission.

The Plan Time window showing the Issue option in the side menu (click to enlarge)



To plan time on an issue, follow the steps below:

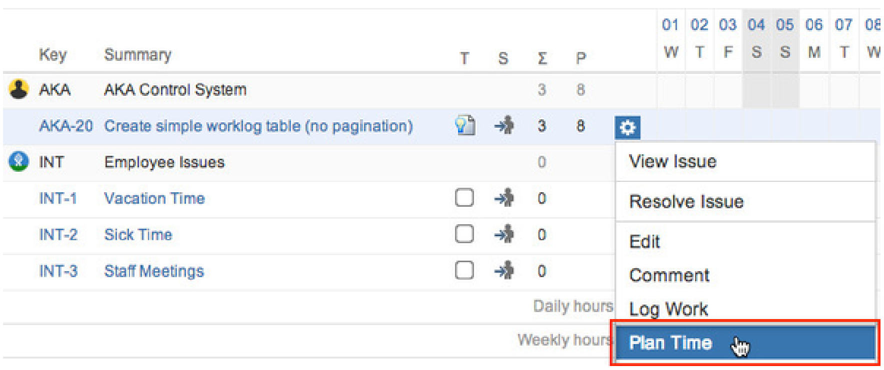
1. Once you have opened the window, select the **Issue** option on the left sidebar.
   The last option that was used, is selected by default.
2. Choose an issue from the drop-down in the **Issue** field (you can also start writing).
3. If you tick the **Period** box, an **End date** field for the time period is displayed.

4. Select a new **Date** (and **End date**) if you are planning on another date than the current one.
   Availability (**Working days**) is displayed below the date in the window. These numbers reflect the users workload schemes and holiday schemes, and if some plans have been done previously on her/him for the date.
5. Fill a number into the field **Planned** for the hours to be planned on the issue (if period is chosen, the field is called **Plan per day**).
   Remaining estimate and **Original estimate** are displayed above for information purposes only, e.g. it doesn't make sense to plan more than the original estimate indicates.
6. Write a brief description in the **Description** field.
   The description is optional and can therefore be omitted.
7. Click the **Plan Time** button if you are done planning or **Cancel** to close without saving. You can also continue to plan, by ticking the **Plan another** box before your click the **Plan Time** button, but this means that the window stays open to do a new plan time entry.

Issue Planning from Action list

The plan time window can be opened from the User timesheet, by selecting the **Plan Time** option in the **Actions** list for an issue in the timesheet.

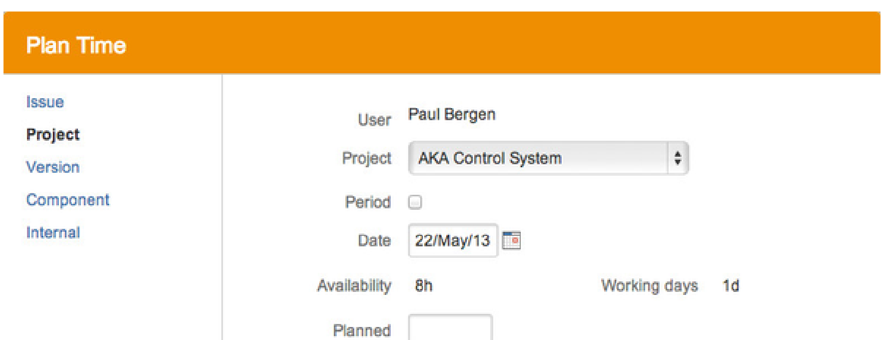
The Plan Time options in the Actions menu for the AKA-20 issue in the user timesheet



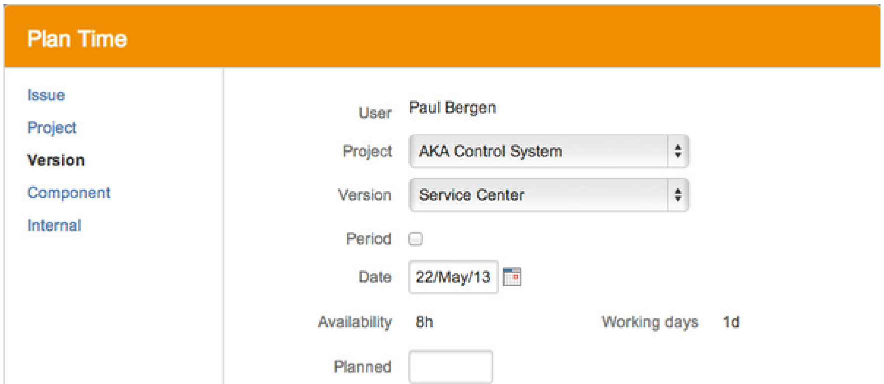
Other Options

As mentioned above it is also possible to plan on activities or *Project*, *Version* and *Component*, and if an Internal Activity has been configured the *Internal* tab becomes available. The plan time window for these other options, does not display *Remaining estimate* and *Original estimate*, since they are associated with issues. The screenshots below show the difference for each option.

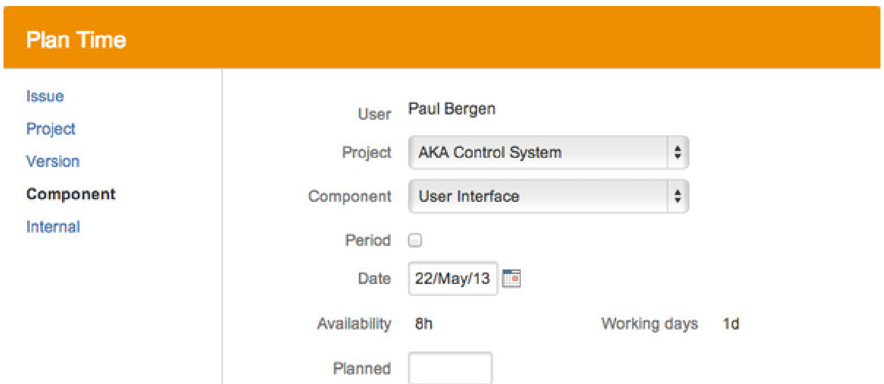
Planning time on Project (choose a project from the drop-down; click to enlarge)



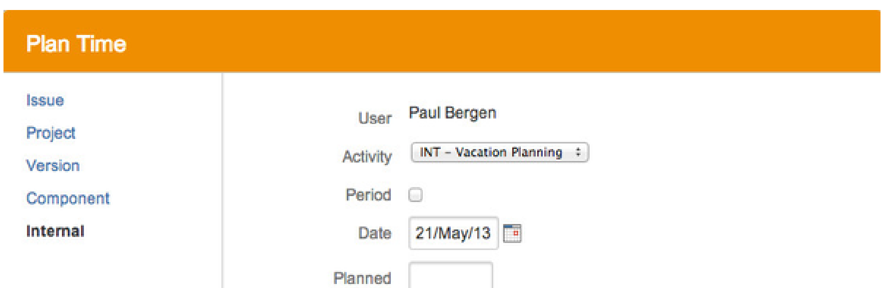
Planning time on Version (choose a project and a version of it from the drop-downs)



Planning time on Component (choose a project and a component of it from the drop-downs)



Planning time on Internal (choose a pre-defined activity from the drop-down)

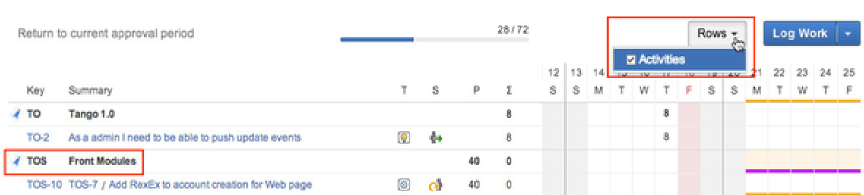


Timesheet Cell Planning

This page explains how the *Plan Time* functionality works by clicking on cell(s) in all Timesheets except Account Timesheet. The screenshot examples below are mostly taken from the User timesheet, where *Team Lead* (or a user with Plan Time permission) John is logged in, but team member Paul is displayed. In order to do user timesheet cell planning, the Activities options needs to be ticked in the Rows menu

Activities refer to a JIRA project, its version or component. These same options are available in the general Plan Time window, along with issue in its left side menu, e.g. time can be planned on those different items - see bottom of page.

User Timesheet showing Activities in the Rows menu and an activity line in the timesheet (click to enlarge)



Clicking on a cell in the activity line in the timesheet, opens a simple *Plan Time* window for the

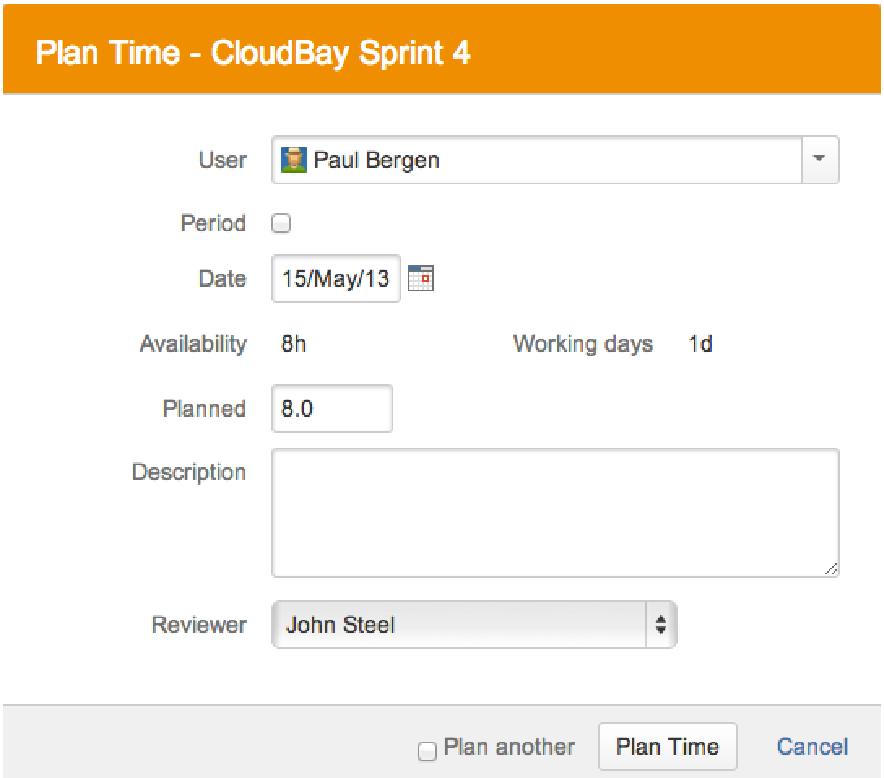
On this page

In this chapter

particular activity.

Note that if you click on the issue line, it opens a Log Work window.

A simple Plan Time window

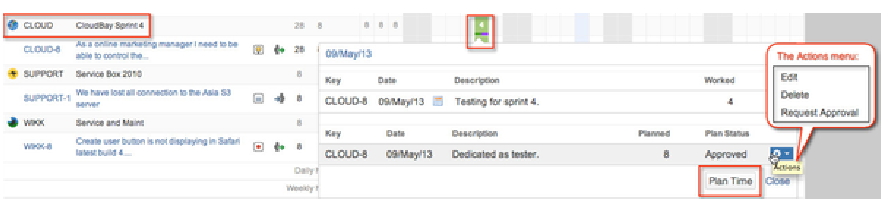


The in-line Edit window

Given that time has both been planned and logged for a matching activity/issue, clicking on the respected cell displays an in-inline edit window. In the screenshots below the activity is the Paradigm Cloud (CLOUD) project and a version of it: CloudBay Sprint 4.

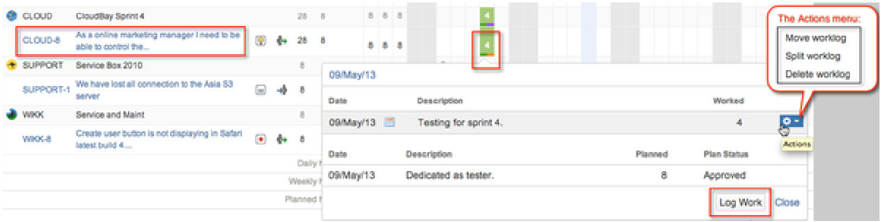
Note the difference between the in-line edit window, depending on if you click on the activity line or the issue line.

The in-line edit window for an activity (click to enlarge)



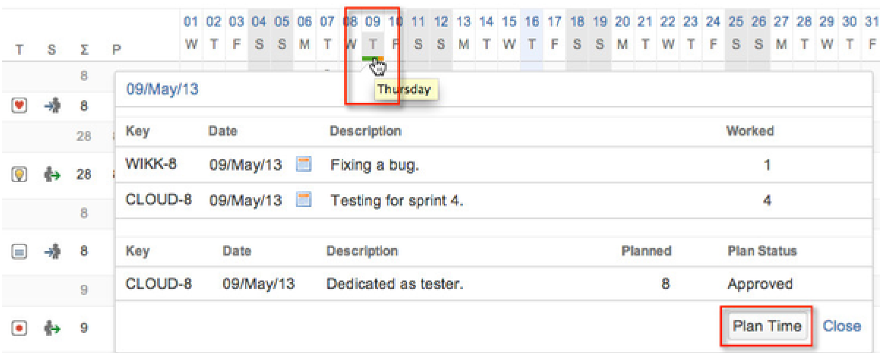
Note that the issue key in the in-line window above is an active link for the issue itself. (The green background color for the timesheet cell indicates the plan has been approved or the action **R equest Approval** has been used.)

The in-line edit window for an issue, displaying a Log Work button and the actions for the logged item



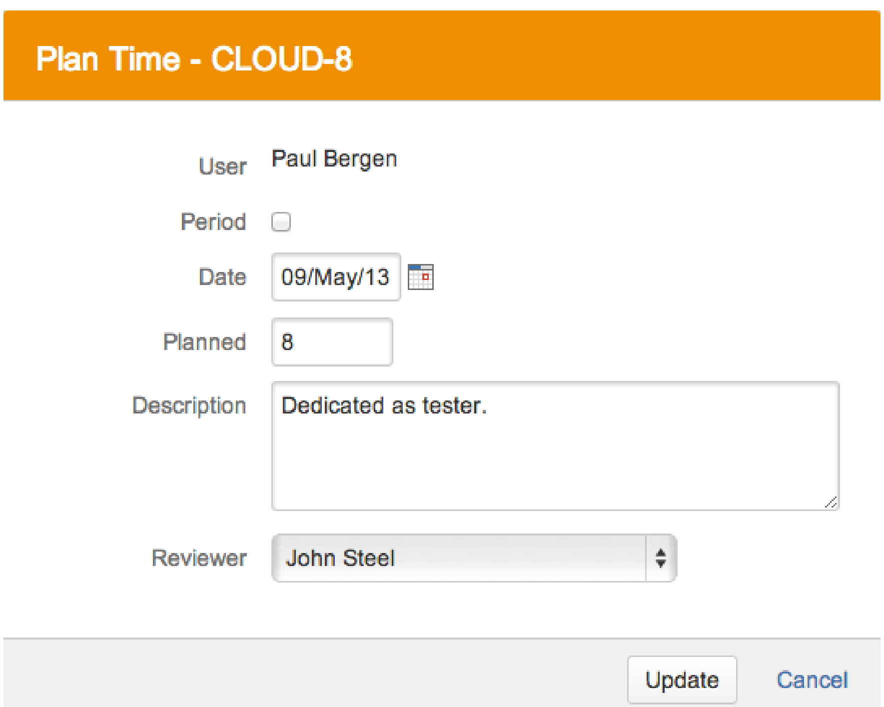
An in-line edit window can also be opened by clicking on days that have plans. This gives users a quick overview of **Worked** and **Planned** hours for the selected day.

The in-line edit window for a planned day, showing both Worked and Planned hours for the day



In order to edit a planned item, use the option from the Actions menu for the planned item in the in-line edit window, see the for example the CLOUD-8 entry in the screenshots above. When you click the Edit option, a simple version of the Plan Time window is opened.

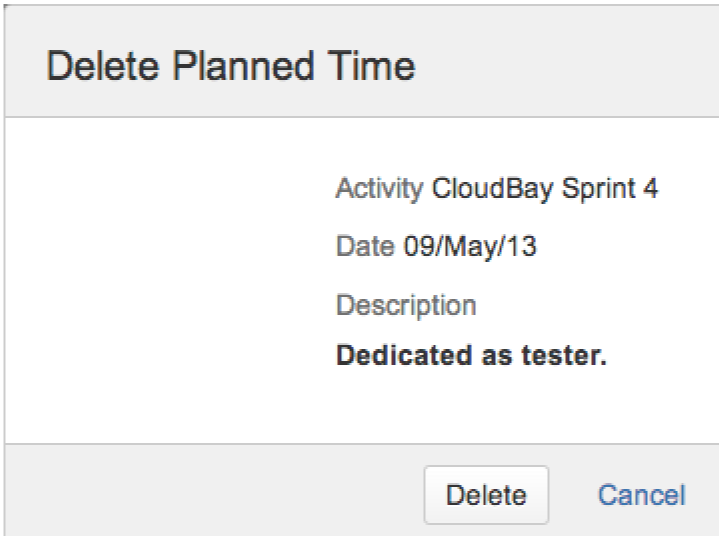
Plan Time window for the CLOUD-8 activity



Edit the entries in the window as needed and click the **Update** button to finish or **Cancel** link to close without saving. It is similarly possible to do editing in the Timesheet Calendar View and all other Timesheets, except *Account Timesheet*.

A planned time can also be deleted by using the **Delete** option from the **Actions** menu for the planned item in the in-line edit window. When you click the **Delete** option, a **Delete Planned Time** window is opened.

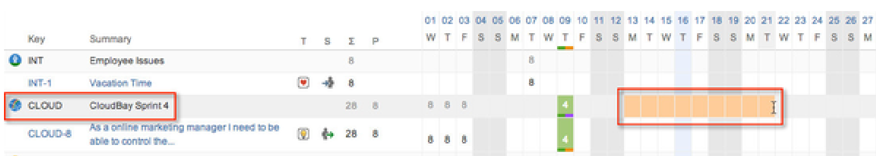
The Delete Planned Time window



Period Planning

It is also possible to do period planning by doing a selection from an activity line in the timesheet, by dragging the mouse over the cells.

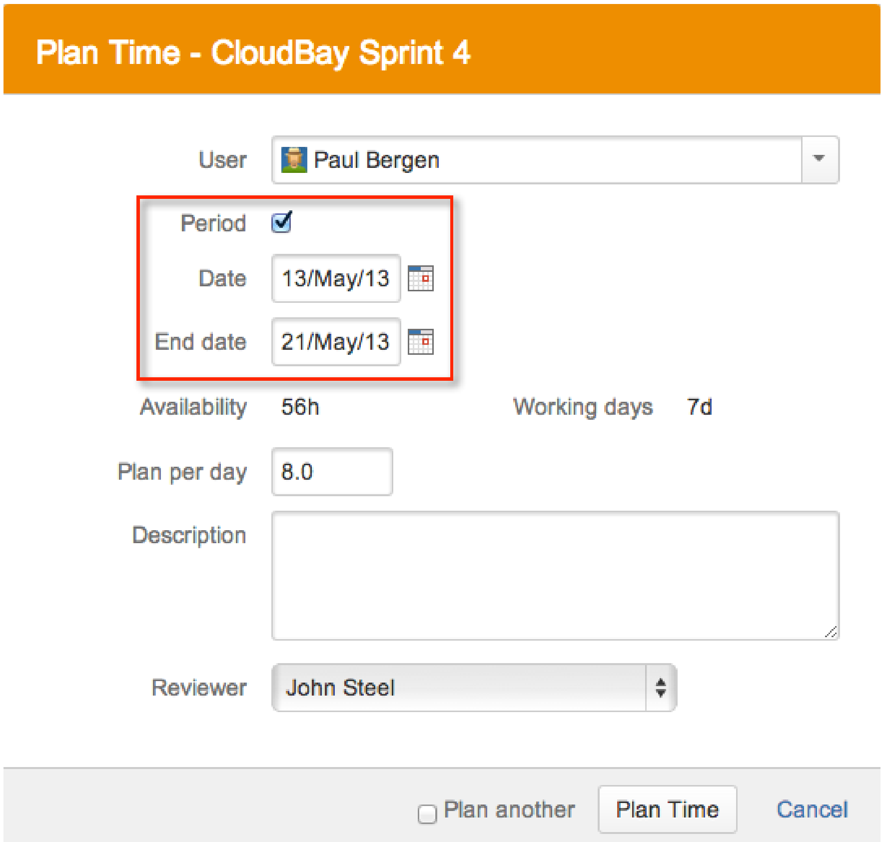
Period Planning in on an activity line in the timesheet (click to enlarge)



This opens the plan time window with the date range selected.

Note that the time planning is not done on weekends as defined in workload schemes or on holidays as defined in holiday schemes for the user in question.

Plan Time window for period planning



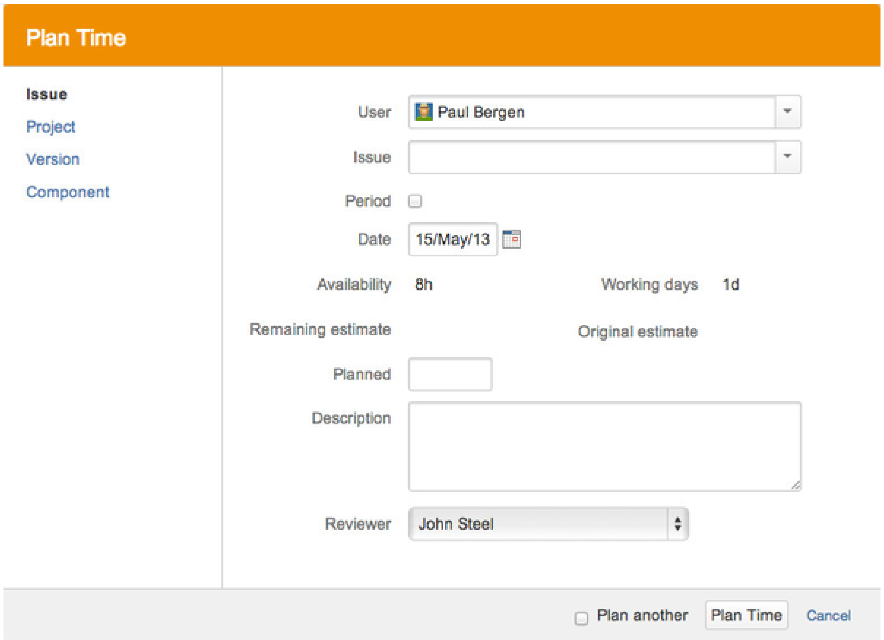
Note that editing or deleting a period plan, will **Edit** or **Delete** the whole period in one go.

Planning in other Timesheets

The Project, Team and Advanced Timesheets are user based, so clicking cell(s) for user(s) in these timesheets will display the *general* **Plan Time** window, with a left side menu to choose an issue or activities.

Note if an Internal Activity has been defined by *Tempo Administrator*, it will show up as **Internal** in the side menu. Internal activity is intended for **vacation planning** and other **out of office** time allocation.

The general plan time window

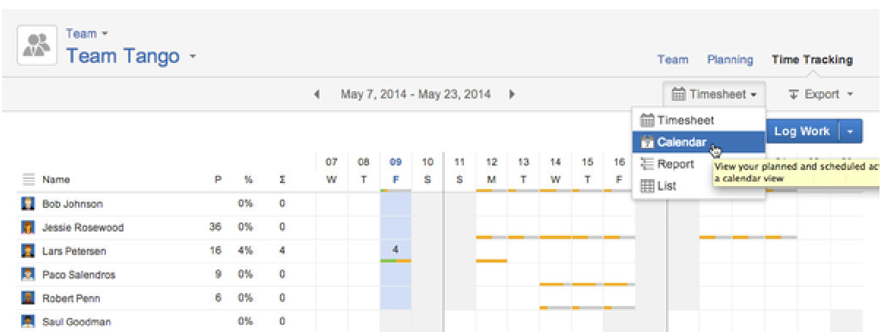


Timesheet Calendar View

This page explains the Timesheet calendar view for Time Planning. It is a useful view in regards to time planning, given the time-planning options are set to their default values. This view displays time planning information for the User, Project, Team and Issue Timesheets.

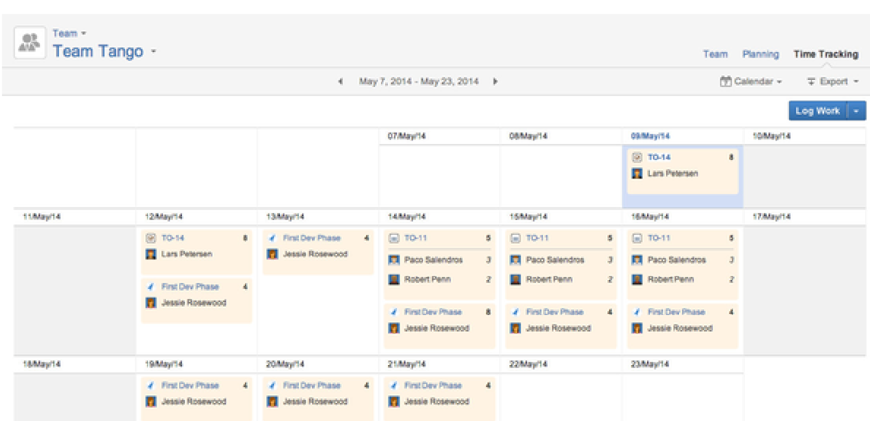
In this chapter

The timesheet calendar view option in the timesheet navigation



The team timesheet in the screenshot above shows some planned times and a few logged hours. Only the planned hours will be displayed in the calendar view.

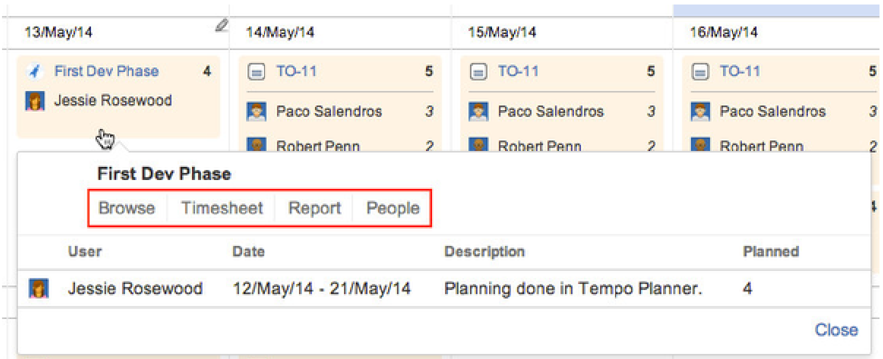
The Team Timesheet in calendar view



As can be seen on the screenshots above and below, the planned items are framed with a light orange background. Clicking somewhere within this background, opens an **in-line editing window**, see the screenshot below.

The planned entries in the in-line editing window have an action menu to the right in the line from where you can **Edit**, **Delete** or Request Approval for a plan.

The in-line editing window in timesheet calendar view



In the screenshot above, several links are shown in a red-framed box. These links are different, depending on if the plan is done on an **Issue** or an **Activity**. The links are explained in the table below.

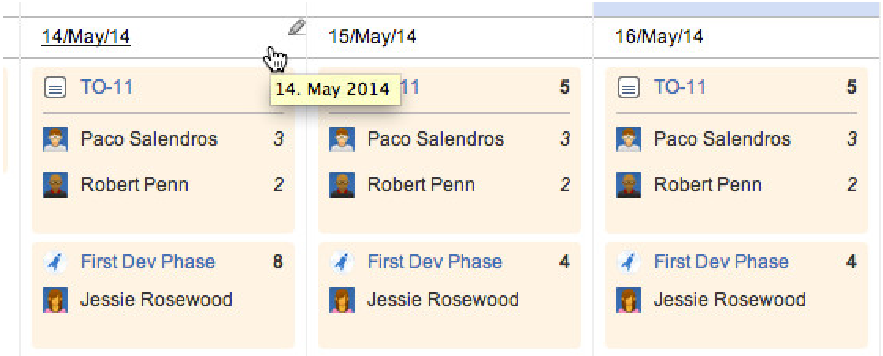
Activities refers to a JIRA project, it's *version* or *component*.

Table: In-line editing window links explained

Issue	Activity	Description
View Issue	N/A	This link takes you to the JIRA Issue page for the particular issue.
Log Work	N/A	Opens the Log Work window to log work on the particular issue.
Report	N/A	Takes you to the tabular **repo rt** view of the Issue Timesheet .
N/A	Browse	This link takes you to the JIRA summary page for the activity in question.
N/A	Timesheet	Clicking this link, opens the Pr oject Timesheet with it's item pickers set to the activity in question.
N/A	Report	Takes you to the Project Report View of the Project Timesheet for the activity in question.
N/A	People	Opens the Tempo **People** tab for the activity in question.

It is also possible to plan time from a cell in the calendar view. Click on one of these options, e.g. the white part of a cell (not the planned part), the link for the day or a pencil icon to the right of the date.

Click on the date or the pencil to open the Plan Time window

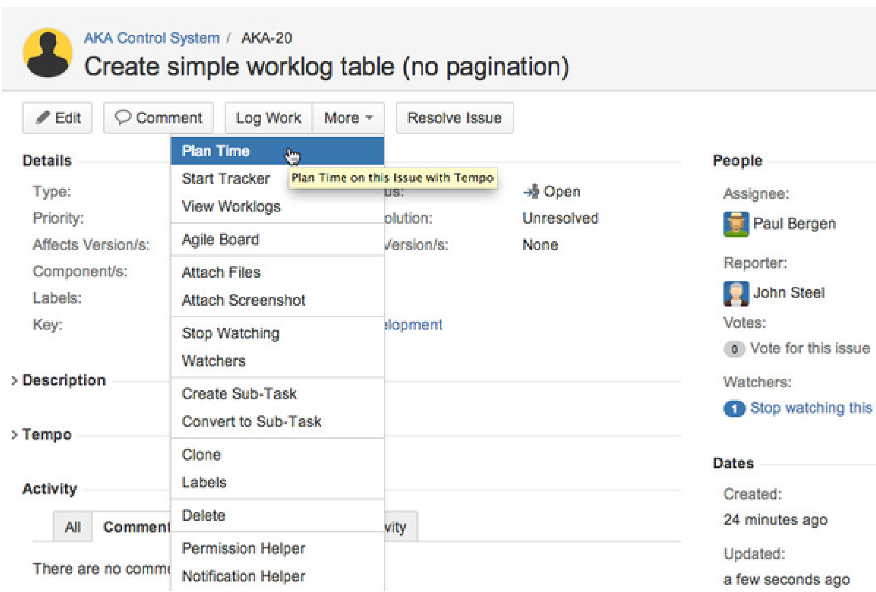


This opens the Plan Time window, where some new planning can be done.

Planning in JIRA issue view

This page explains how to **Plan Time**, while in JIRA issue view. Expand the **More** menu and select the **Plan Time** option from it.

Selecting the Plan Time option from the More menu an JIRA issue

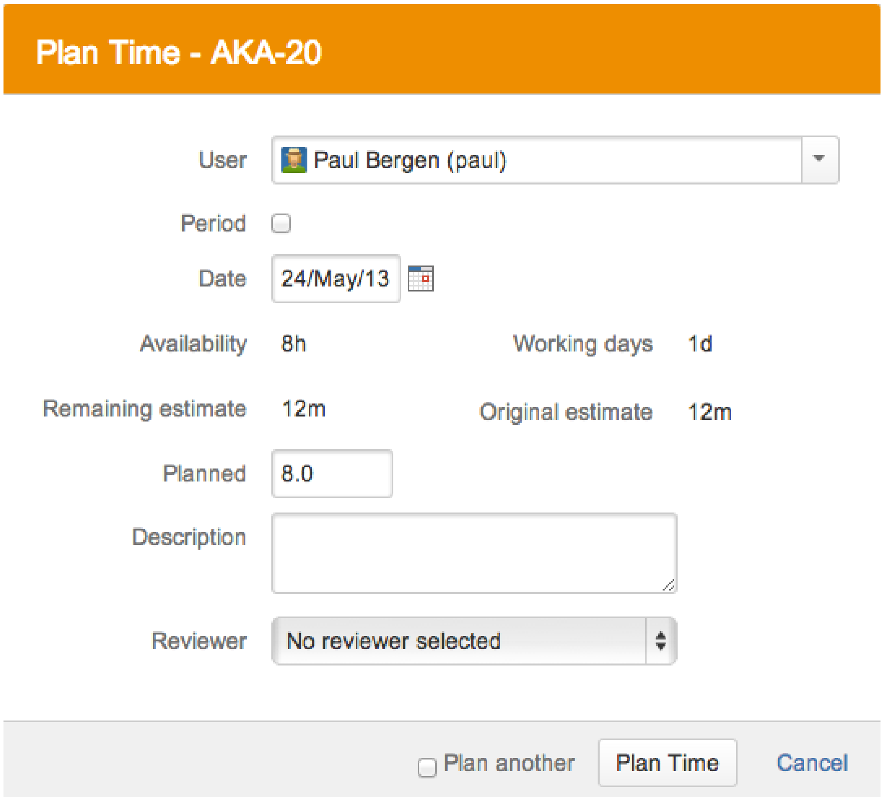


The **Plan Time** window for the issue is displayed with the current date and the user's **Availability** f or the selected date.

Go to Plan Time window page to get more detail on window's fields.

The Plan Time window for the AKA-20 JIRA issue

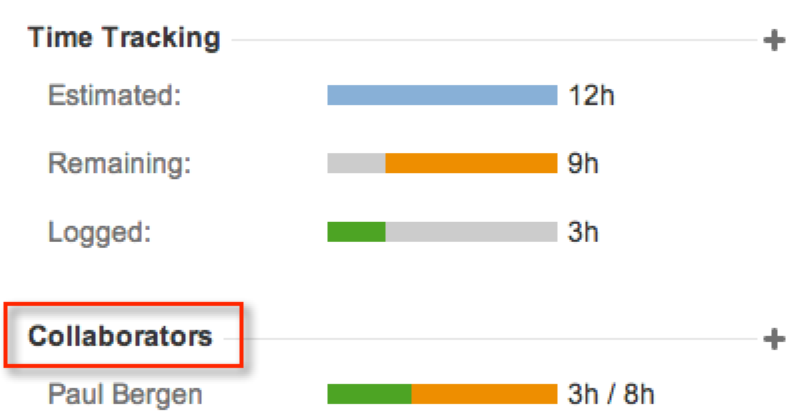
In this chapter



Issue Collaborators

If the time-planning options are set to their default values, a right panel called **Collaborators** is displayed in the JIRA issue.

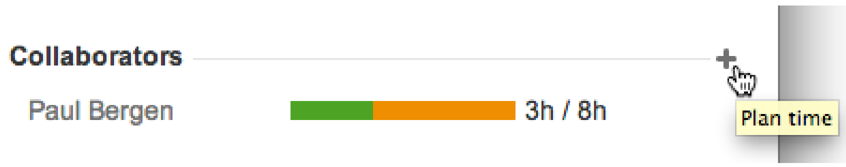
Collaborators panel in JIRA issue view



Paul Bergen is the only user that has logged work on this issue. All users who **track time** or are **pl anned** on an issue are added to the **Collaborators** list. These users are displayed with a status bar where worked vs planned time are show in **green** vs **orage** colours respectively. The screenshot above shows this also as 3 worked hours out of 8 planned hours.

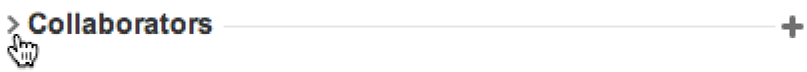
The plan time window can also be opened by clicking on the **+** to the right of collaborators.

Open the Plan Time window from collaborators



The collaborators list can be expanded and collapsed.

Expand and collapse the collaborators list



Your own data is displayed. If you have View All Worklogs permission for the project, data of other users is also displayed.

Planning Approval Process

Request Approval

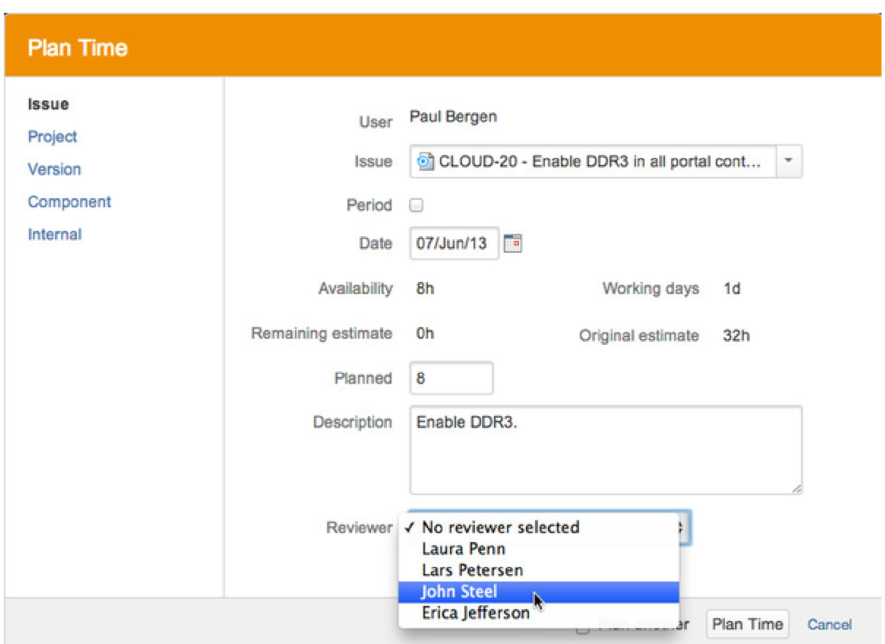
In this chapter

This page explains the **Request Approval** workflow process for planned time. In order for this approval process to work, it needs to be set in Tempo Global Configuration.

When this option is enabled, users can request plans that they made be approved or rejected by a reviewer (*Team Lead* or another user with Plan Time permission). The screenshot below shows a **Reviewer** being selected in the Plan Time window and the text entered in the **Description** field becomes a message to the reviewer.

User can not select own name as reviewer.
If only one user has Plan Time permission, nothing is displayed in the reviewer list for that user.

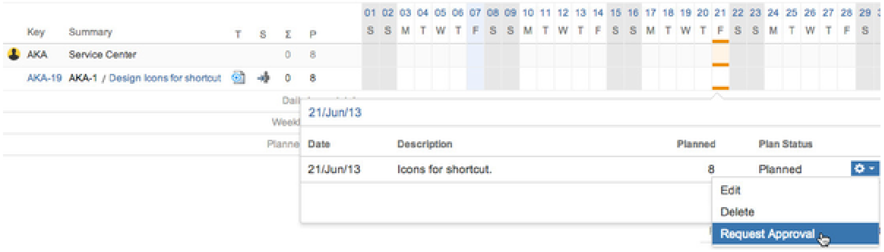
Selecting a Reviewer for a planned issue (click to enlarge)



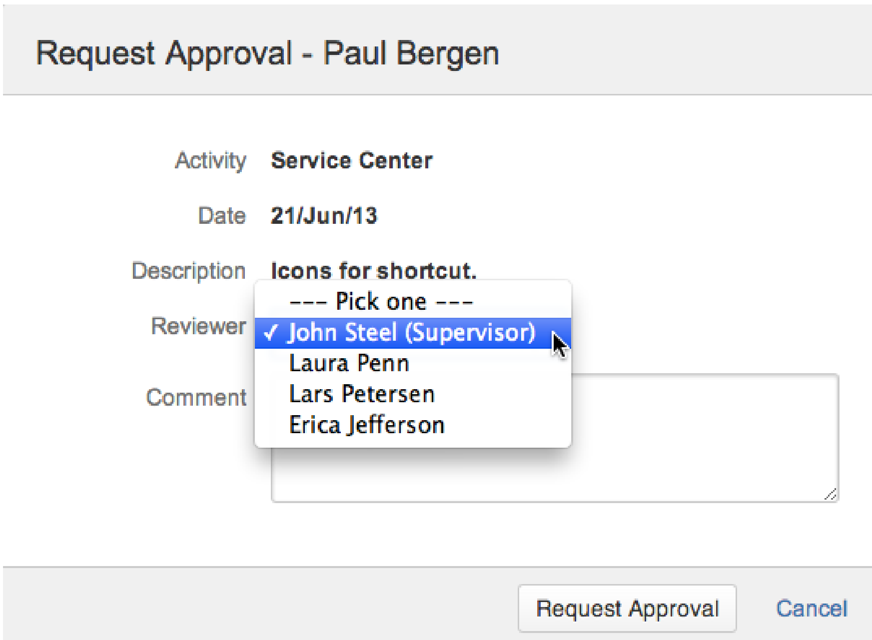
If Paul and John have configured the Tempo activity stream provider, this activity will be displayed in their dashboards.

The **Reviewer** can also be selected from the in-line edit window. Clicking on the planned Timesheet Cell and choose the **Request Approval** action option, which opens the *Request Approval* window to select the reviewer.

Selecting Request Approval option from the Actions menu, in the in-line edit window (click to enlarge)

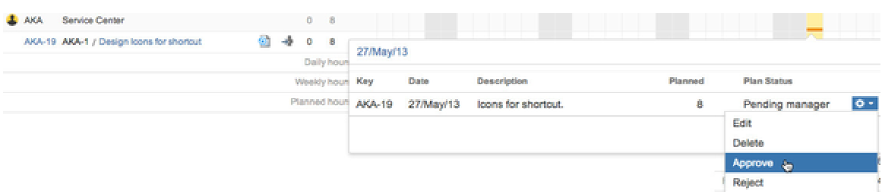


The Request Approval window (click to enlarge)

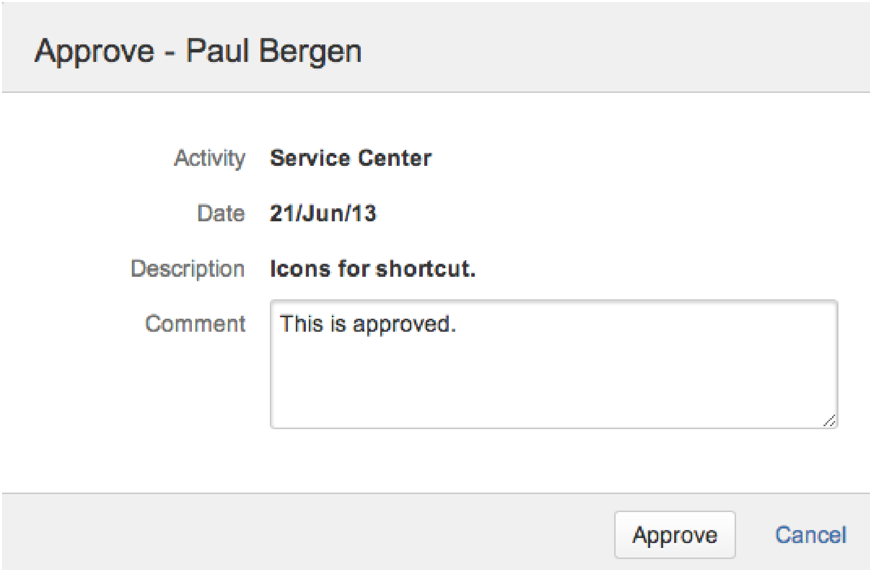


Since John is now the reviewer for this planned item, the actions menu in the in-line edit window for him, has now the options **Approve** and **Reject**.

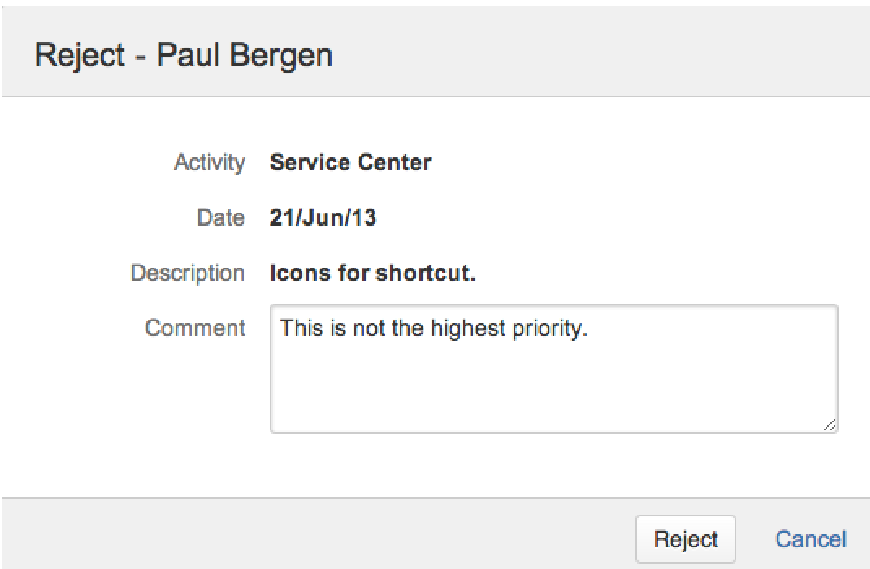
The Approve and Reject options in John's Actions menu (click to enlarge)



The Approve window (click to enlarge)



The Reject window (click to enlarge)



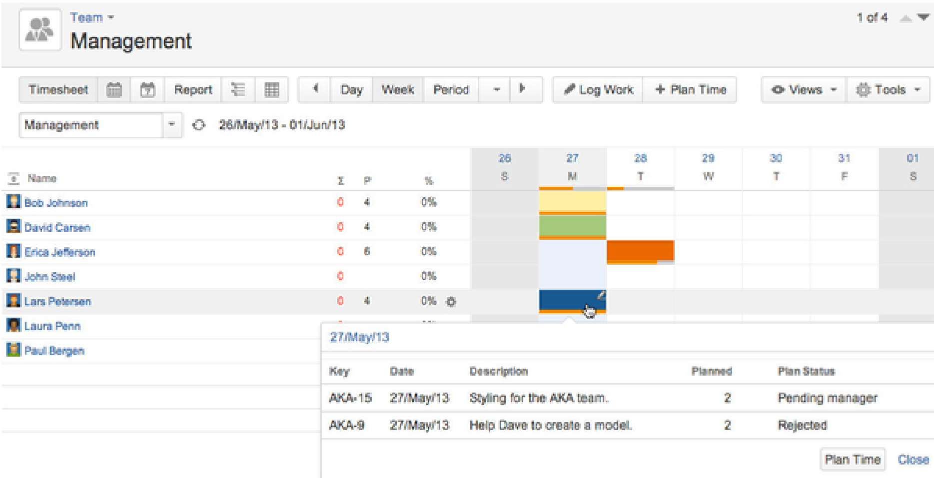
The status of planned items is displayed with different background colors in the Timesheet cells. Pl anned items that do not have any status yet are displayed with **orange** bars at the bottom in the timesheet cells.

When a reviewer has been selected the background color becomes **light yellow-orange** for the planned item. Once the item has been approved, the background color changes to **green**. Other statuses are shown in the table and screenshot below.

Table: Statuses for planned items

Background color	Status of a Planned Item
None	A reviewer has not been selected
Light yellow-orange	Pending Manager
Green	Approved
Dark orange	Rejected
Blue	More than one statuses for the selected item

Statues for planned items shown in the Team Timesheet



Shared Planning Data

As of **Tempo Planner 1.2** and **Tempo Timesheets 7.9**, planning data is shared between these two products. This is given the plan items are supported in each product:

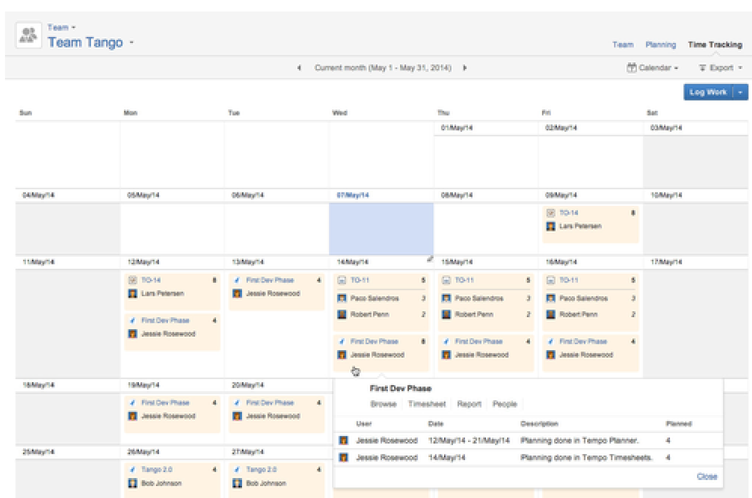
Tempo Timesheets can only handle JIRA Issues and Activities (JIRA Project and it's Versions or Components).

- This means that planned Epics, Sprints and plans on Kanban boards in Tempo Planner are not displayed in Tempo Timesheets.
- Items planned on teams or recurring plan items in Tempo Planner, are also not supported in Tempo Timesheets.

Tempo Planner can handle all plan items from Tempo Timesheets except Internal Issues.

- Plan items done in a different scope from the current one in Tempo Planner, are shown transparent.
- For example items done in another team or in Tempo Timesheets.

Planning data shown in Tempo Timesheets - Team Timesheet Calendar View (click to enlarge)



The description shown in the in-line dialog, is the one given when the item was planned, either in Tempo Planner or Tempo Timesheets.

Plan items that are only available in Tempo Planner like Sprint planning are not displayed in Tempo Timesheets

Timesheet Approval Process

Tutorial

Timesheet approvals

Workflow Statuses

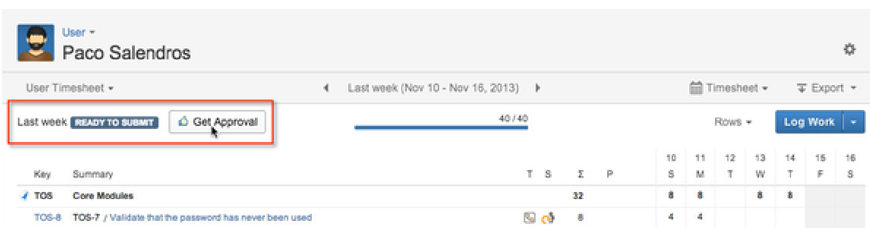
In order for the User timesheet approval process to work, your JIRA administrator needs to select **E nable timesheet approval process** in Global Configuration, by either choosing to do so on a *Wee kly* or a *Monthly (Period)* basis.

Required permission

- **Approve Timesheet** permission
- View All Worklogs permission for the projects that the user is working on

Once enabled, a button called **Get Approval** and a workflow status appear in the sub-header area of the timesheet. If enabled as Weekly, the Date navigation has to be set as **Week** and the same applies if enabled as Monthly (Period), the Date Navigation has to be set as **Month**.

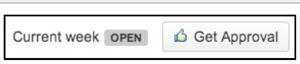
User Timesheet where 'timesheet approval process' is set to Weekly



Note, if the Date navigation is set to another value than the approval process, a link will be shown as in the screenshot below.

Message - Return to current approval period

Table: Describes the different Workflow statues in the Timesheet Approval Process

Status	Who can edit worklogs?	Description
 Current week OPEN Get Approval	All users	The chosen period (set as Weekly or Monthly) is not finished or the required workload has not been completed (work has not been logged as expected).

On this page

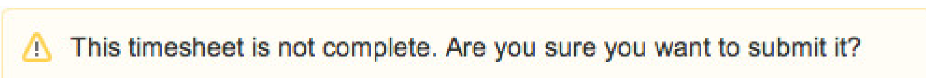
In this chapter

	All users	The required workload has been completed (work has been logged as expected) and/or the period is finished. This is also the status for **Rejected** timesheets.
	Only users with Approve Timesheet permission for the team.	The user has clicked the **Get Approval** button and sent the timesheet for approval.
	Worklogs not editable	The Timesheet has been approved by a Reviewer, a user with the Approve Timesheet permission for the team. **Note**, the Timesheet Approval report with a better overview of approval statuses for team members.

Get Approval

The **Get Approval** button is active in Workflow statues, *Open* and *Ready to submit*. When the user clicks the button on the User Timesheet, a confirmation window is displayed, where the user can verify the dates and the total sums.

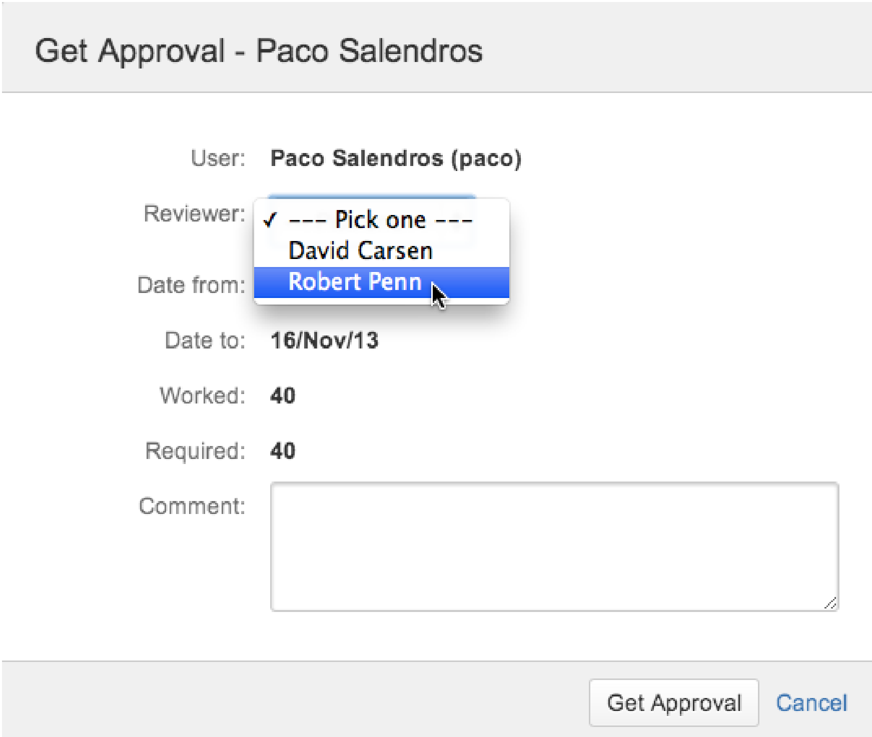
If the Workflow is not in status *Ready to submit*, a warning message is displayed:



In the Get Approval confirmation window, a **Reviewer** needs to be selected, given there are many to choose from.

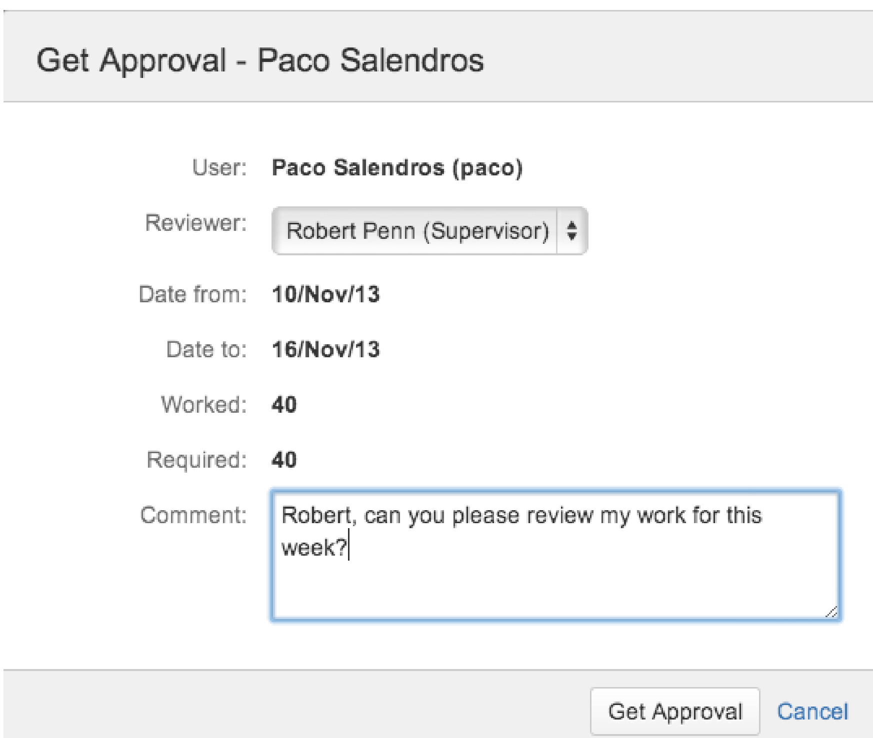
A **Reviewer** is a user that has the Approve Timesheet permission for the team. If the user can select from more than one reviewers, s/he can set a default Reviewer (My Supervisor) in User preferences.

Selecting a Reviewer in the confirmation window



Adding a comment is optional, but if done it will show up in the Activity Stream on a dashboard that has been configured so.

Adding a Comment in the confirmation window



Click the **Get Approval** button in the Get Approval confirmation window and the window closes with the Workflow status changing to *Waiting for approval* in the User Timesheet. In the *Waiting for approval* state, the period (either configured as Weekly or Monthly) is now closed for adding and/or editing worklogs. Closed periods are displayed greyed out in the User Timesheet.

The Workflow status is 'Waiting for approval' and the timesheet is greyed out

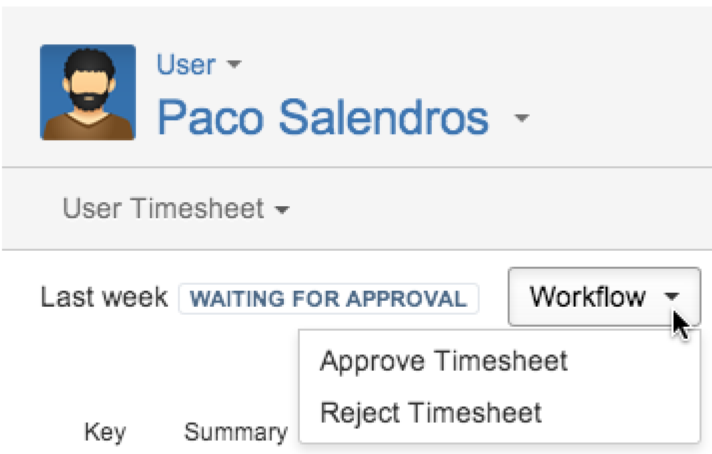
The period in the User Timesheet has now been sent off to a **Reviewer** and s/he can either **Approve** or **Reject** it from the action list in the Team Timesheet.

Once a period on a User Timesheet has been Approved, it is no longer editable.

Approve Timesheet

The Get Approval button has now changed to a drop-down called **Workflow** for the Reviewer , which has the options to **Approve Timesheet** or **Reject Timesheet**.

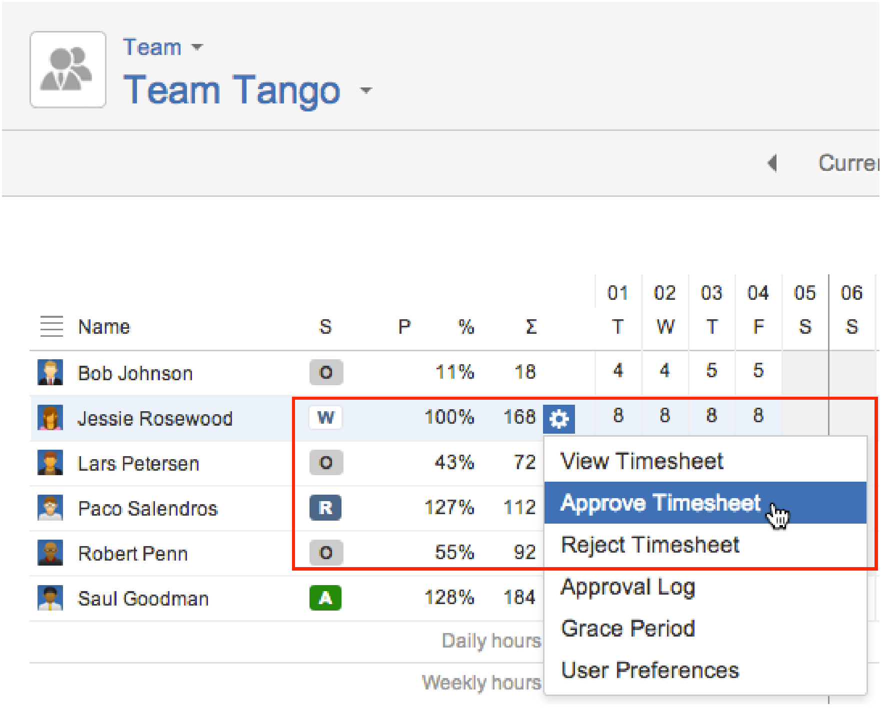
Workflow actions for Reviewer Robert



The Workflow actions can also be accessed from the Team Timesheet for each team member in the Actions list (see screenshot below) and through the Timesheet Approval report in Tempo Teams.

Other actions in the Actions list are View Timesheet, Approval Log, Grace Period (given the Tempo Scheduler has been enabled) and User preferences.

The Actions list a Reviewer sees for a team member in the Team Timesheet

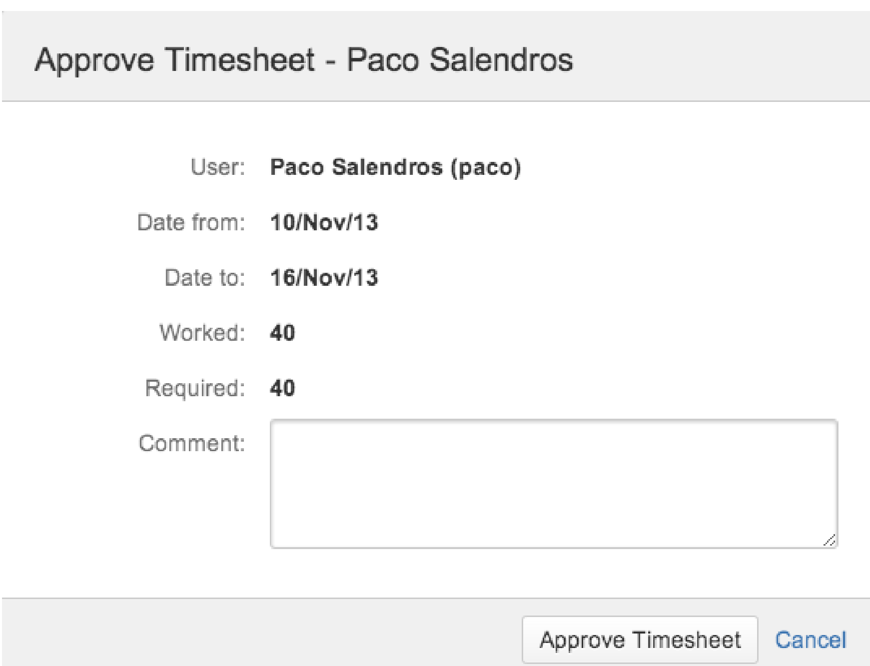


The status symbols for each user is displayed in the Status column of the Timesheet where **R** stands for *Ready to submit* and **W** for *Waiting for approval*.

By selecting the Approve Timesheet option, an **Approve Timesheet** confirmation window is displayed.

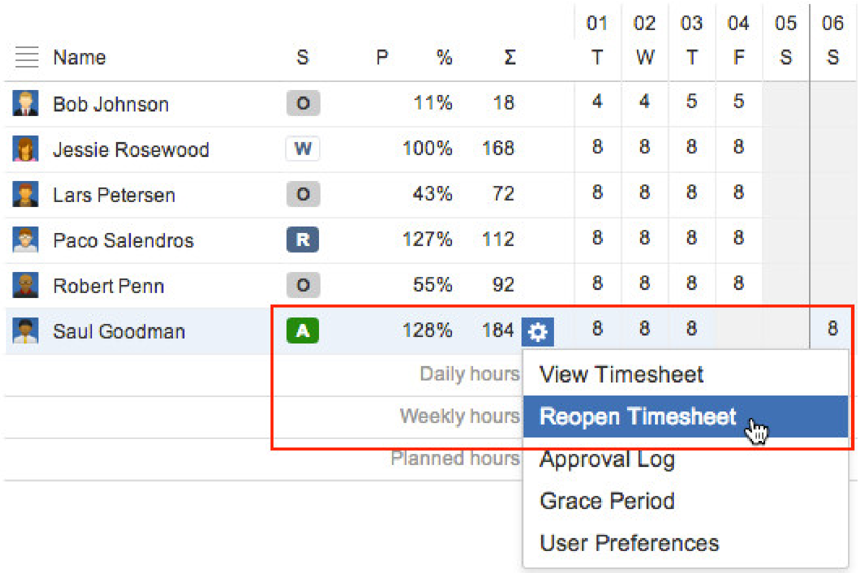
The comments added will show up in the Activity Stream of a dashboard if it has been configured so.

The Approve Timesheet confirmation window



Click the **Approve Timesheet** button on the Approve Timesheet confirmation window. The Workflow status for the team member has now changed from *Waiting for approval* to *Approved*. The Reviewer can withdraw the approval by using a new Workflow action option called **Reopen Timesheet**. This changes the status for the team member to *Ready to submit*.

The Workflow action Reopen Timesheet



There is also the case where a user, that has the Approve Timesheet permission (for example Robert) approves his own User Timesheet, e.g. chooses himself as a reviewer in the Get Approval window.

A few statements/an example to clarify this point:

- An activity is added to Robert's dashboard and an email is sent if the default option is enabled in User preferences.
- Robert can **Approve** and **Reject** his own timesheet from his User timesheet.
- He can **not** Approve/Reject his own timesheet from the Team Timesheet - the options are not available in his user action list.
- All other users with the Approve Timesheet permission for the team he is in, can Approve Robert's timesheet both from his User Timesheet and his user actions list in other timesheets.

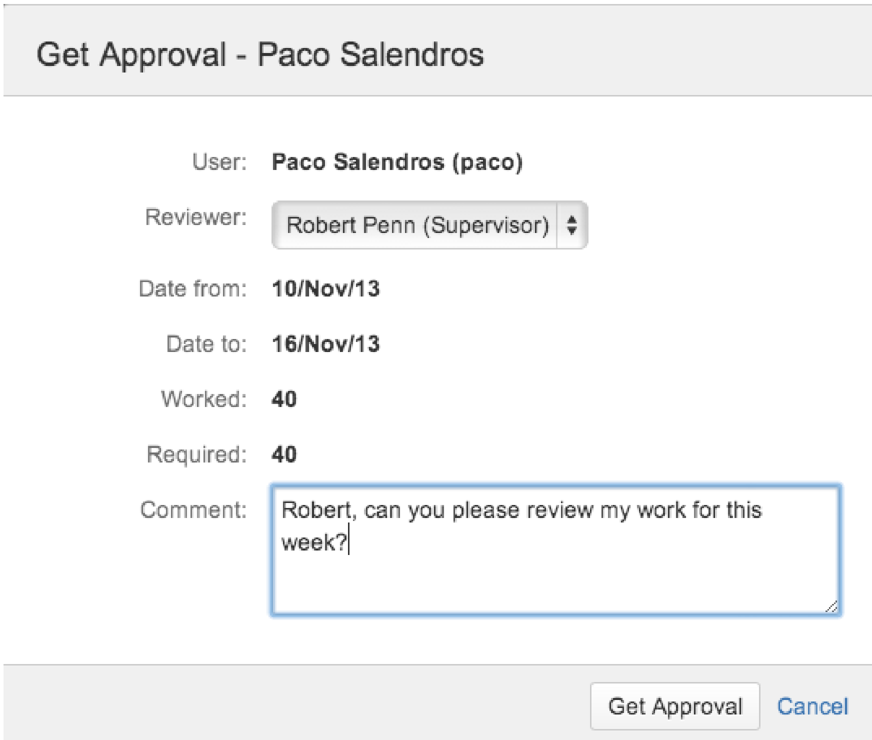
Notifications for Approval Process

This page describes the workflow notifications, that are part of the Timesheet Approval Process and how they appear in the Activity Stream.

In this chapter

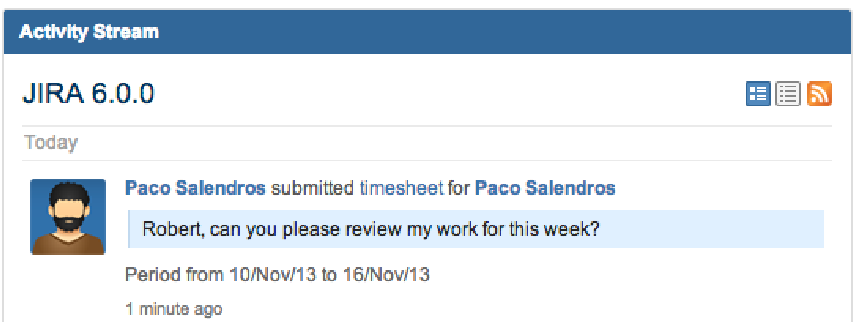
The team member **Paco Salendros** has completed the weeks required work and sends his timesheet to **Robert Penn** for approval.

Paco Salendros is sending an approval request to Reviewer Robert Penn



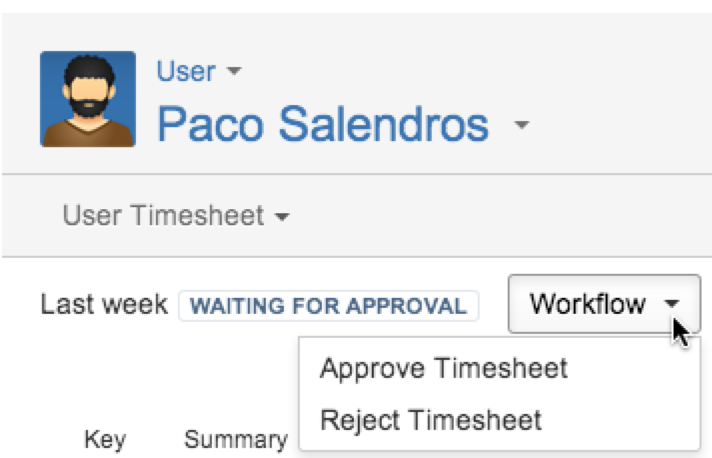
Both Paco and Robert have configured a dashboard to display all Tempo Activity. The screenshot below shows the activity that is displayed on both dashboards.

The Activity Stream is showing Paco's request to Robert to review his work for the week



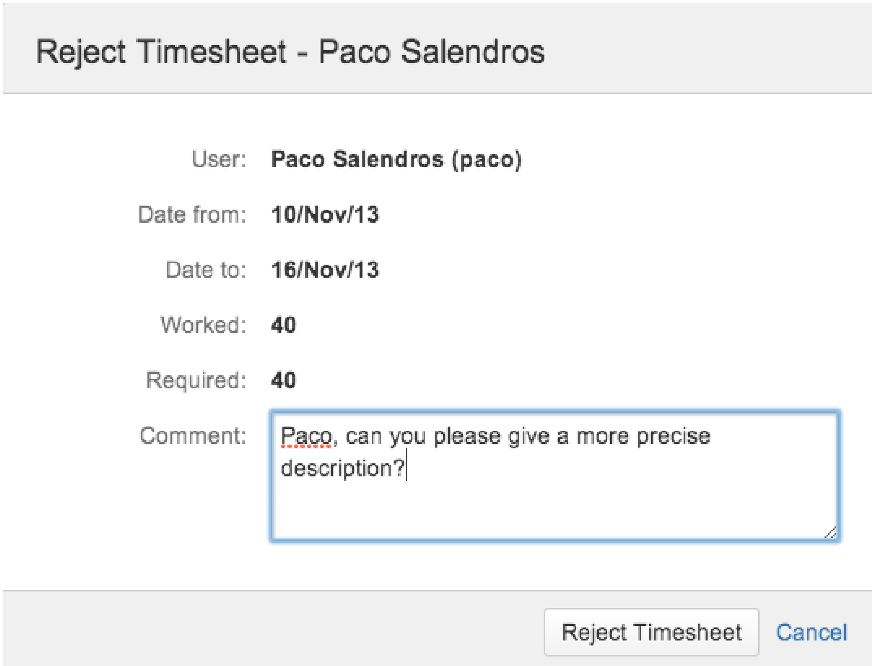
Robert can select between **Approve Timesheet** and **Reject Timesheet** in the Workflow list displayed on his User timesheet.

Workflow actions for user with Approve Timesheet permission



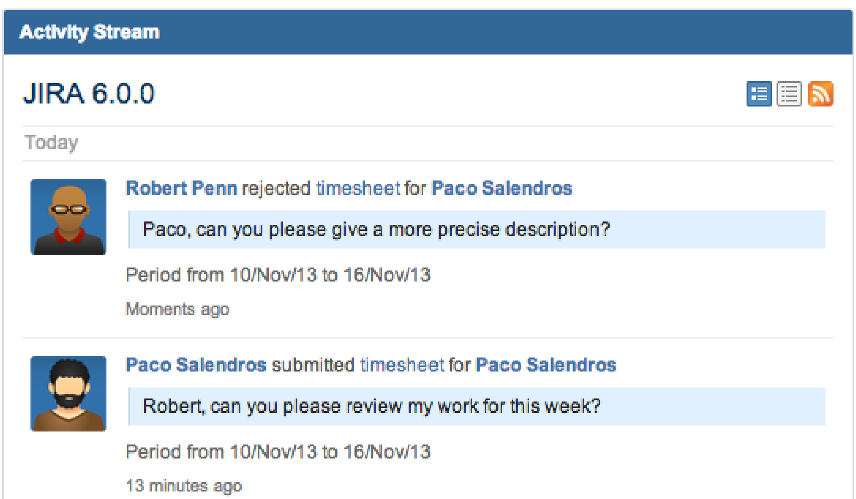
Robert thinks Paco needs to improve the descriptions for his worklogs, so he rejects the timesheet with a comment to Paco.

Reject Timesheet window



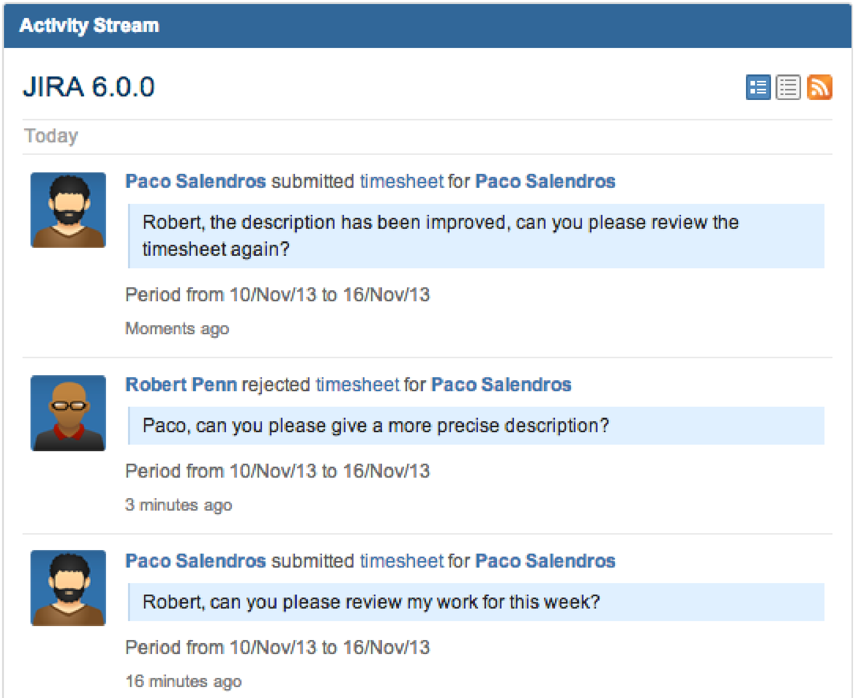
The **Rejected** activity is added to the dashboard's Activity Stream.

The new activity is shown in the Activity Stream



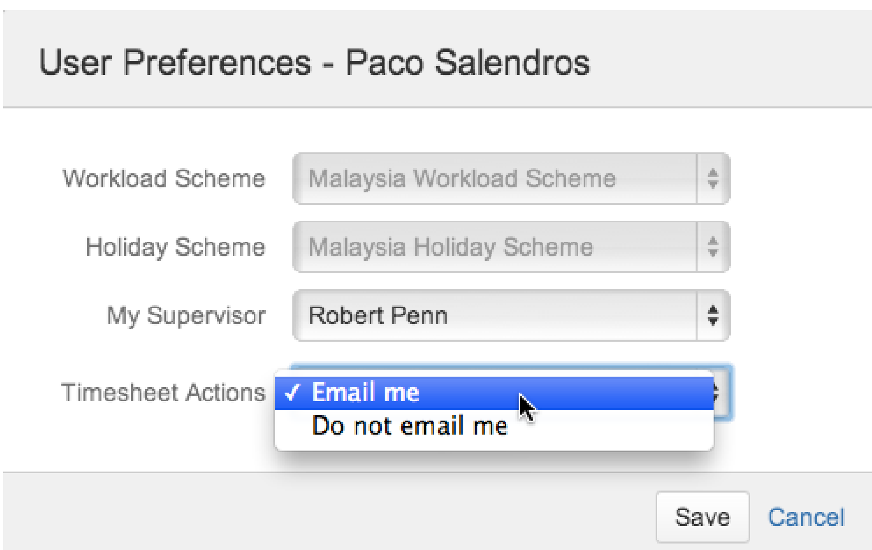
Paco improves the worklog description and send his timesheet again to Robert, and this activity is added to their dashboards.

The new activity is again shown in the Activity Stream

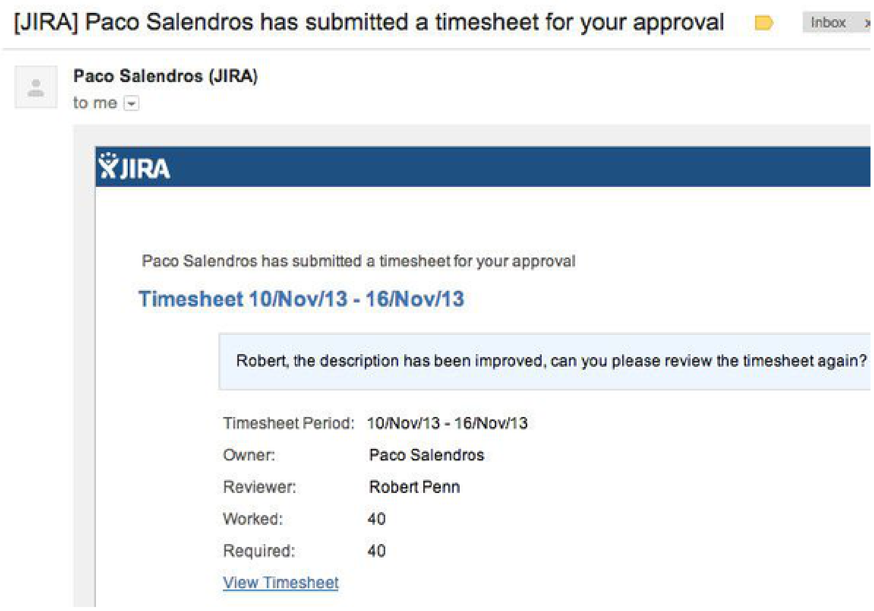


Both users have enabled the **Email me** default option for the Timesheet Actions in the User preferences window and an email is sent for every action.

Timesheet Actions in User Preferences set to Email me



Robert has received an email showing the action Paco did



Timesheet Approval report

The **Timesheet Approvals** report and the **Approval Log** are part of the Timesheet Approval Process. The Timesheet Approvals report gives an overview of the approval status of team members for a given month, and the Approval Log gives an overview for one team member over a year.

On this page

In this chapter

Required **permission**

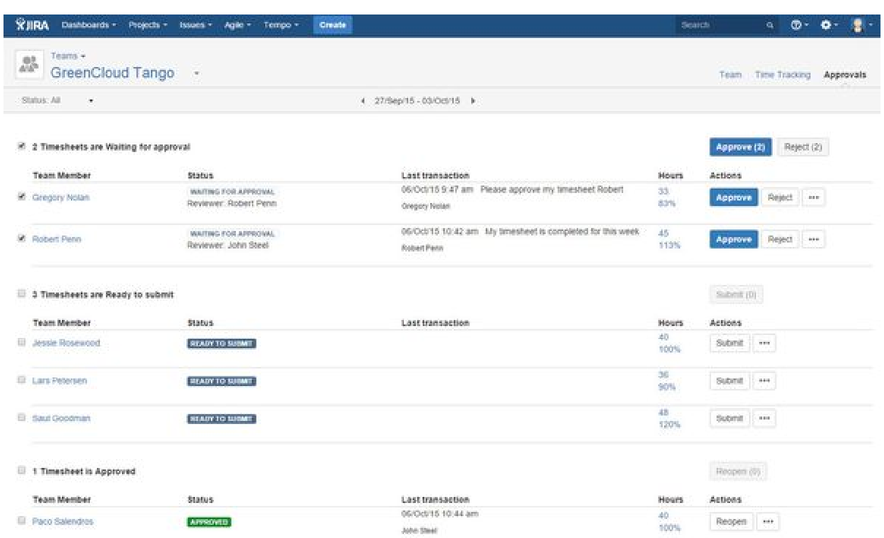
- Approve Timesheet permission
- View All Worklogs permission for projects that the users are working on

Timesheet approvals

The Timesheet Approvals Report is accessed from Tempo Teams through the **Approvals** link that is displayed on the page and on Team Timesheet

The data in the report is taken entirely from Tempo Timesheets, and the report is therefore displayed only if it is installed and the **Enable timesheet approval process** setting in Global Configuration is set to *Weekly* or *Monthly*.

The Timesheet Approvals Report (click to enlarge)



The Timesheet Approvals report shows the approval *Status* for each *Team Member*, *Hours* (logged /required). A "Last transaction" column shows the *Comment* and *Reviewer* as entered in the Get Approval dialog.

The reviewer can perform actions on multiple timesheets, as documented on the Approving multiple timesheets page.

Note that the user who performed the action may be the reviewer, if the reviewer performed the action on behalf of the team member.

The team member list can be filtered through the Status drop-down to the left above it. Next to the Status filter is a date navigation box, to navigate between set periods. The Actions cog wheel has different actions available, depending on the current status for each team member. The actions for each status are the same as in the Team Timesheet and as explained on the Timesheet Approval Process page. A summary of the actions is given in the table below.

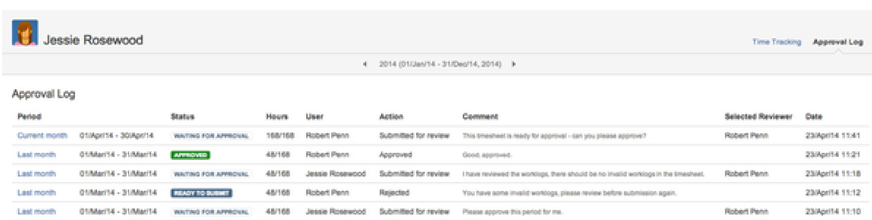
*Table: A summary of actions for each timesheet status - the actions in **bold** are the ones that vary between different types of status*

Status	Available Actions
Open or Ready to submit	View Timesheet (User timesheet), **Get Approval**, Approval Log, Grace Period, User preferences
Waiting for approval	View Timesheet, **Approve Timesheet**, **Reject Timesheet**, Approval Log, Grace Period, User Preferences
Approved	View Timesheet, **Reopen Timesheet**, Approval Log, Grace Period, User Preferences

Approval log

Clicking the Approval Log option for a team member in the actions cog wheel list opens a summary of all approval communications for this member over the current year.

The Approval Log for Jessie Rosewood



Each line in the Approval Log shows the *Period* to which the data relates, and there is a link to the corresponding date range in the User Timesheet. Also shown are the *Status*, *Hours* (logged/require d), *User* (who changed the status), which *Action* was performed, the *Comment* as entered through the Get Approval dialog, the *Selected Reviewer*, and the *Date* on which the action was performed.

Note that the user registered for the action may be the same as the Selected Reviewer if the reviewer performed the action on behalf of the team member, as is the case for the first line in the Approval Log screenshot.

The date range can be changed above the log in the sub-header - click on the arrows to each side to change the year. The *Time Tracking* link to the right in the header opens the corresponding User Timesheet for the current month.

Approving multiple timesheets

This page explains the **Timesheet Approvals** report, which is part of the Timesheet Approval Process. The Timesheet Approvals report provides an overview of the approval status for all team members, grouped by status within the selected period.

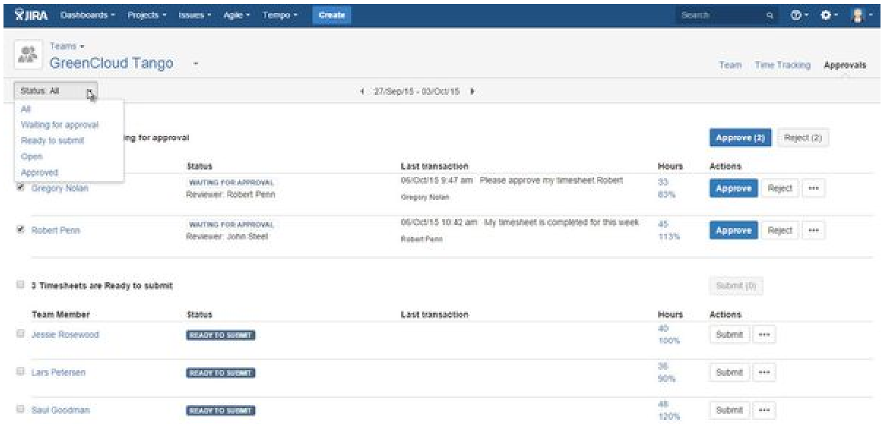
Required **permission**

- Approve Timesheet permission
- View All Worklogs permission for projects that the users are working on

Timesheet approvals

The Approvals link is displayed in the header of the Team Timesheet. This link opens the Approval Report for the period, in a weekly or monthly view, depending on the Global Configuration.

Timesheet Approvals for team members, grouped by status - click to enlarge

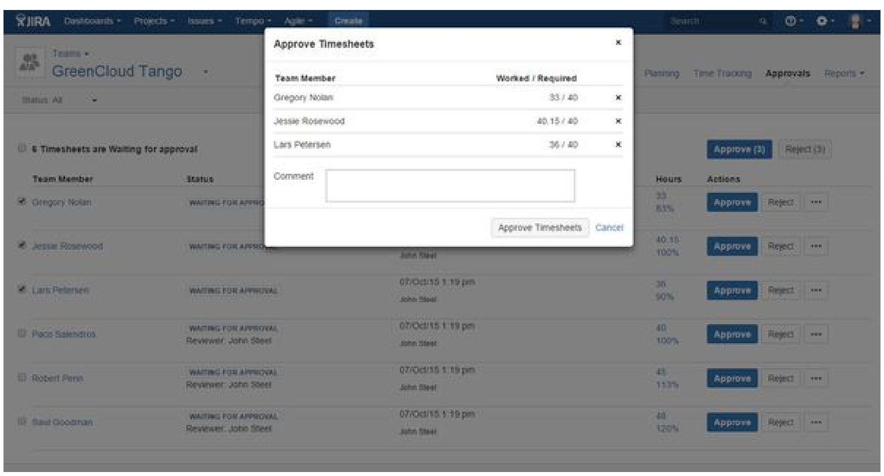


Only users with Approve Timesheet permission for the team can see the Approvals link and perform actions on the timesheets that are listed.

Multiple approvals

Timesheets for all users in the team are displayed, grouped by Status, with *Waiting for Approval* dis played at the top and *Approved* timesheets displayed at the bottom of the page. You can select a status to be displayed in the filter option on the left side of the header.

Reviewer approving timesheets for 3 team members



To perform actions on multiple timesheets, select the check boxes at the beginning of the rows. You can quickly select all users that have the same status by selecting the check box above the list of users.

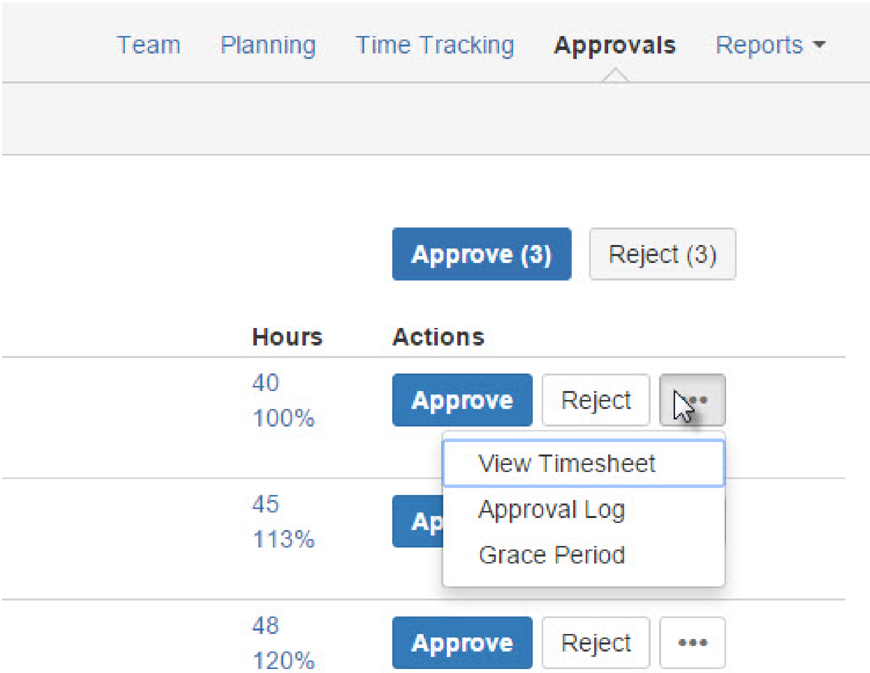
Actions

To see more actions, click the three dots. Possible actions include viewing the timesheet and the A pproval Log, and specifying a Grace Period (if the Tempo Scheduler has been enabled).

On this page

In this chapter

Action list in the Approval Report



Navigation Options

Navigation Overview

This page gives an overview of various navigation options for Tempo products, especially in the JIRA top navigation bar.

Navigation options in JIRA top navigation bar: Tempo, Help, Administration and User drop-down menus

Table: The Tempo menu in top navigation explained

Tempo Menu	Menu Items
	The **Timesheets** link opens the User timesheet and it is the default value in the menu. From the User Timesheet, the user can navigate to other timesheets. The Timesheets page, and other pages in the same chapter, cover the core functions of Tempo Timesheets The **Tracker** item is covered on the Tempo Tracker page.
	Teams is a module that Tempo Timesheets is integrated into, to handle team management. Individual teams may be present in the menu as recently visited. The **more...** option, opens the Tempo Teams main page, which gives an overview for all teams, that have been created.
	Accounts is a module that Tempo Timesheets is integrated into, to handle account management. Individual accounts may be present in the menu as recently visited. The **more...** option, opens the Tempo Accounts main page, which gives an overview for all accounts, that have been created.
	About Tempo is covered below.

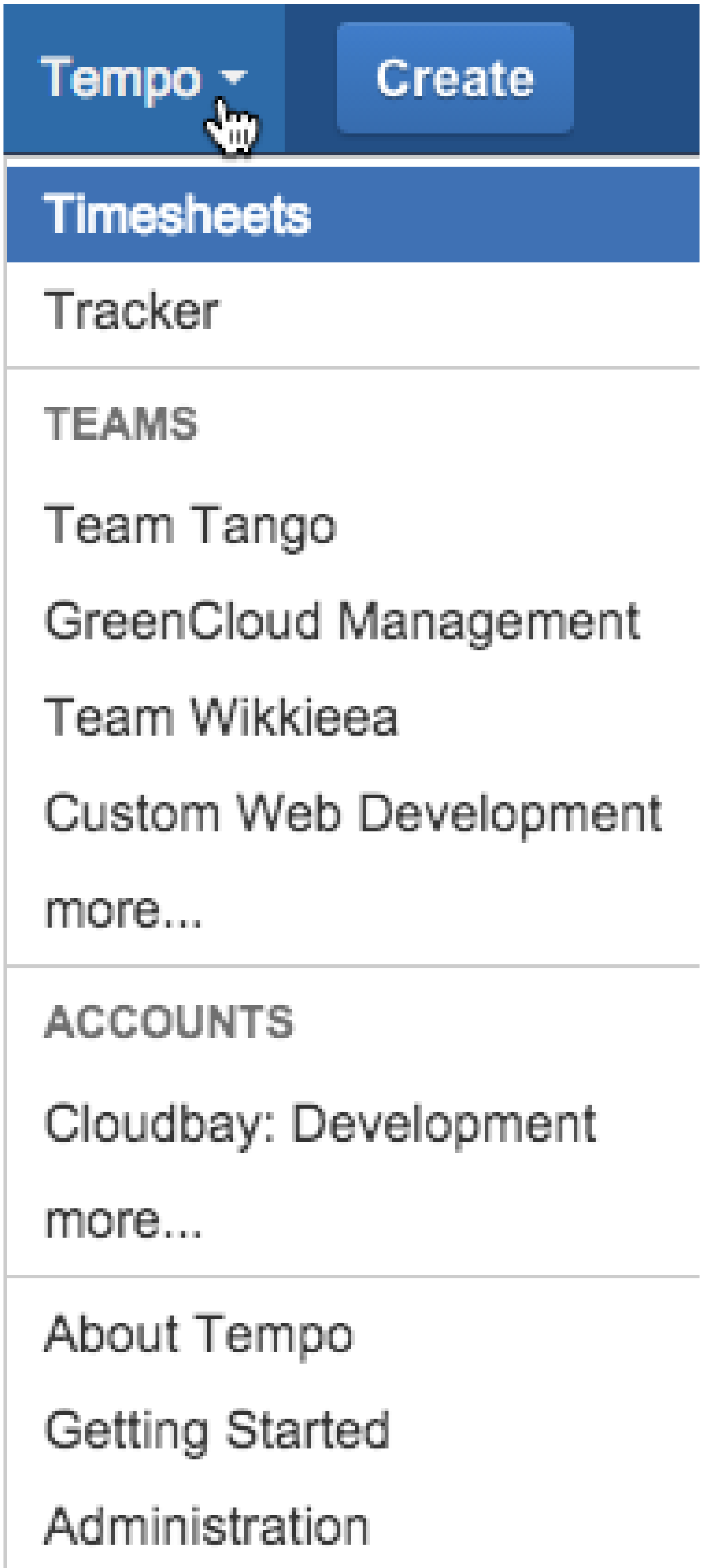
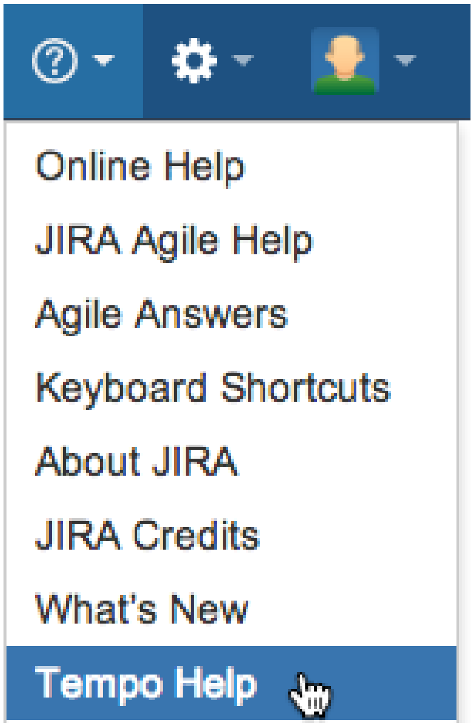
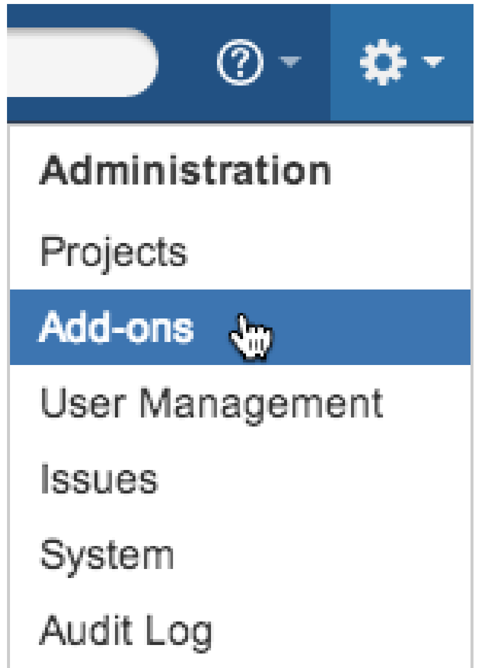
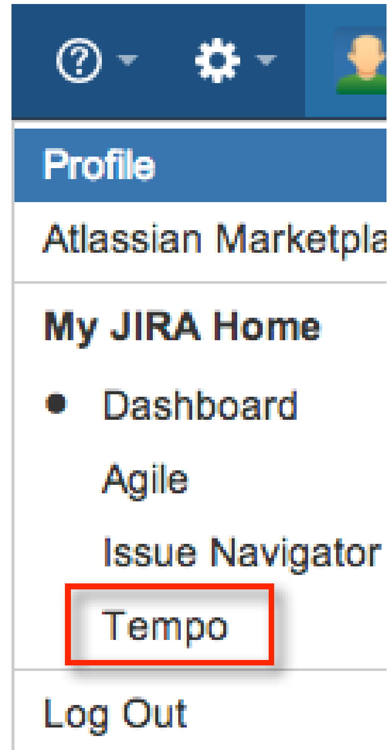
	Clicking **Getting Started** in the Tempo menu, opens a page within your JIRA setup, with resources to get you started with Tempo Timesheets. The **Administration** option is only available for those that have the Tempo Administration or JIRA Administrations permission.

Table: The Help, Administration and User drop-down menus

Help Menu	Administration Menu	User Menu





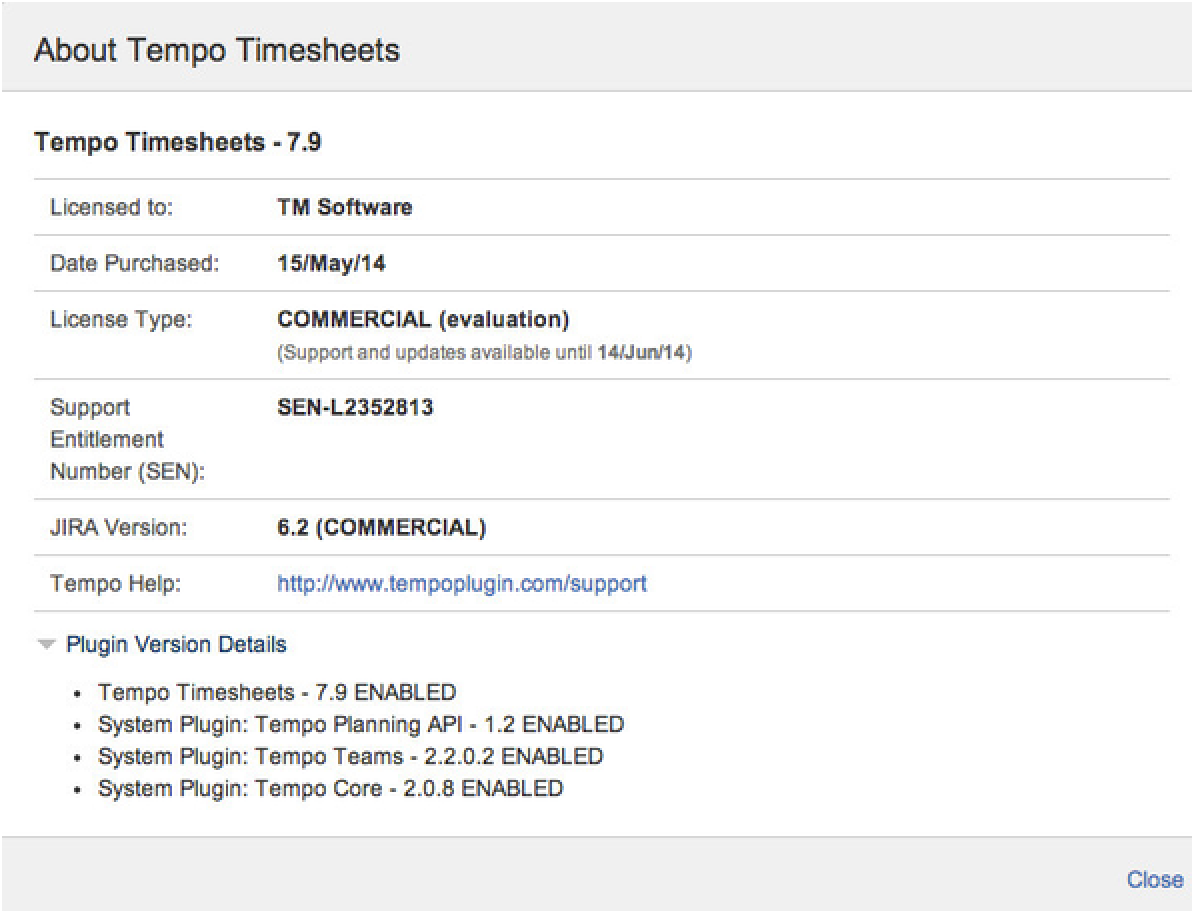


The Tempo Help in the JIRA Help menu, opens the Tempo FAQ page.	The Tempo Administration functions can be accessed though the **Add-ons** option in the JIRA Administration menu.	The user profile menu has an option under **My JIRA Home** for **Tempo**. Click this option if you want Tempo Time to become your JIRA homepage.

About Tempo

The **About Tempo** window can be accessed from two menus in JIRA/Tempo. The first menu is the Tempo top navigation menu (as above) and the second menu is the **Tools** menu in the timesheets header.

The About Tempo Timesheets window (click to enlarge)



The About Tempo window gives an overview of the Tempo Timesheets version details and you can click the Tempo Help link for support.

If Tempo Services is configured for an external system, you would also see the **Last external worklog update** in the window.

Last external worklog update in the About Tempo Timesheets (click to enlarge)

Project Configuration

Projects can be displayed with custom color in Tempo Timesheets planning display for the timesheets.

In this chapter

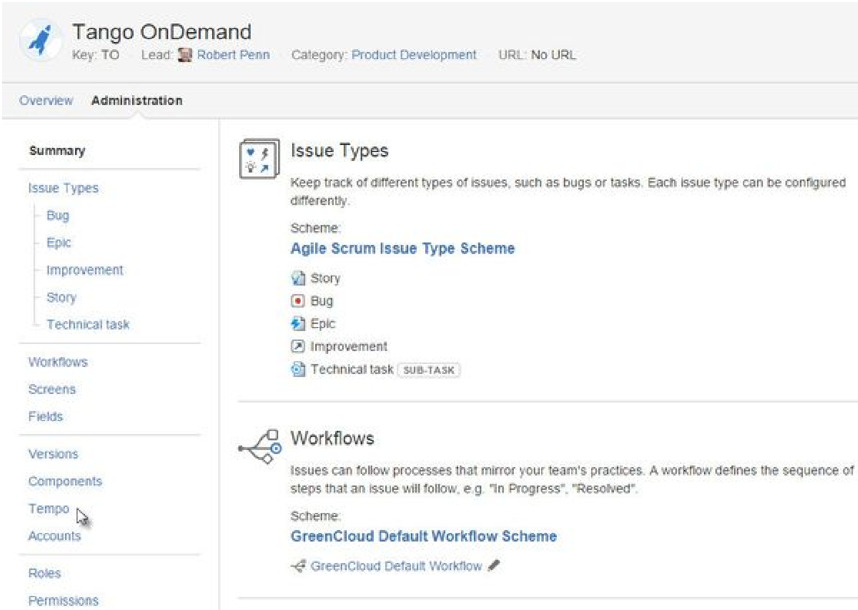
Required permission

Project Administrator JIRA permission

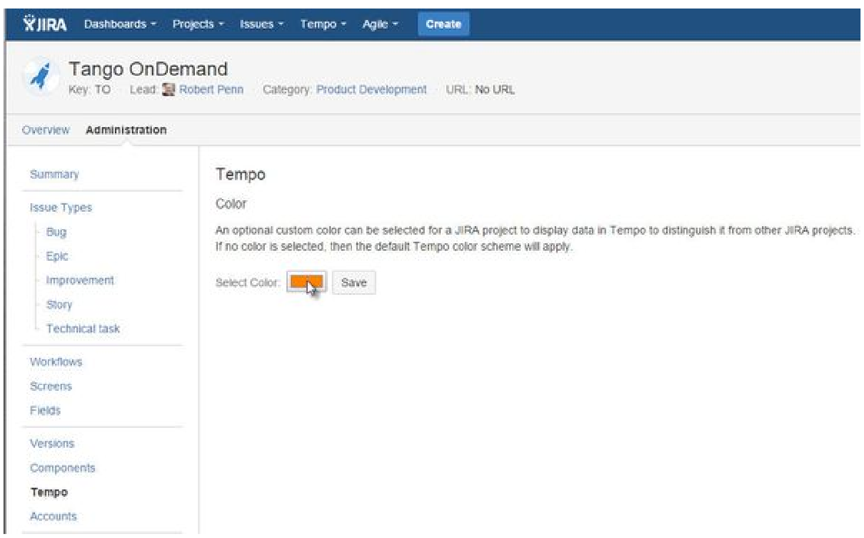
Procedure

To start configuring a custom color for a project:

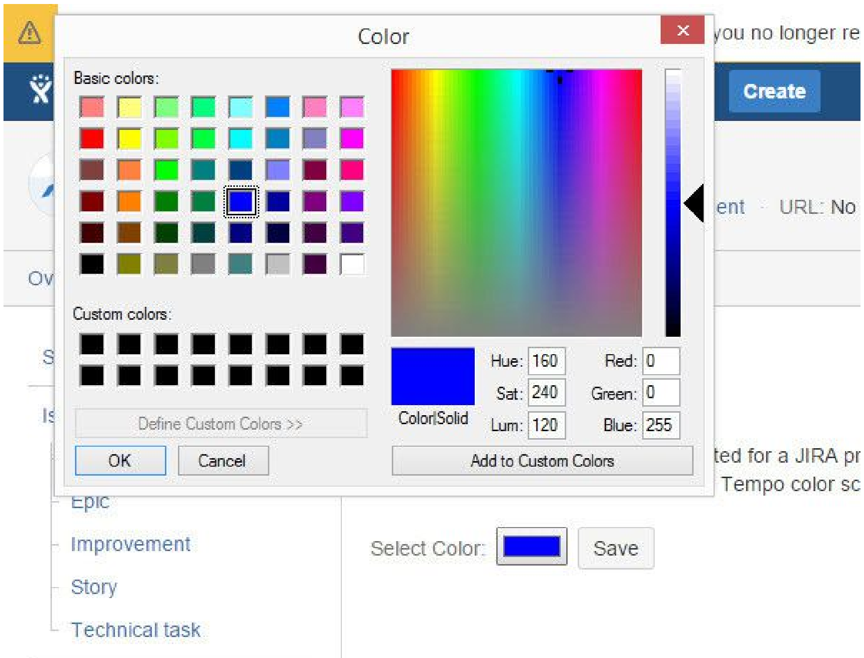
1. Log in to JIRA as a Project Administrator.
2. Choose the **Projects** option from the cog icon at top right of the screen.
   Keyboard shortcut: **g + g +** start typing **project**
3. Click on the project name from the project list, to open it's **Administration** section.



4. Open the Tempo tab in the left sidebar, which has orange as default color code.
5. Click on the color box to open the color palette.



6. Select a custom color from the color palette.



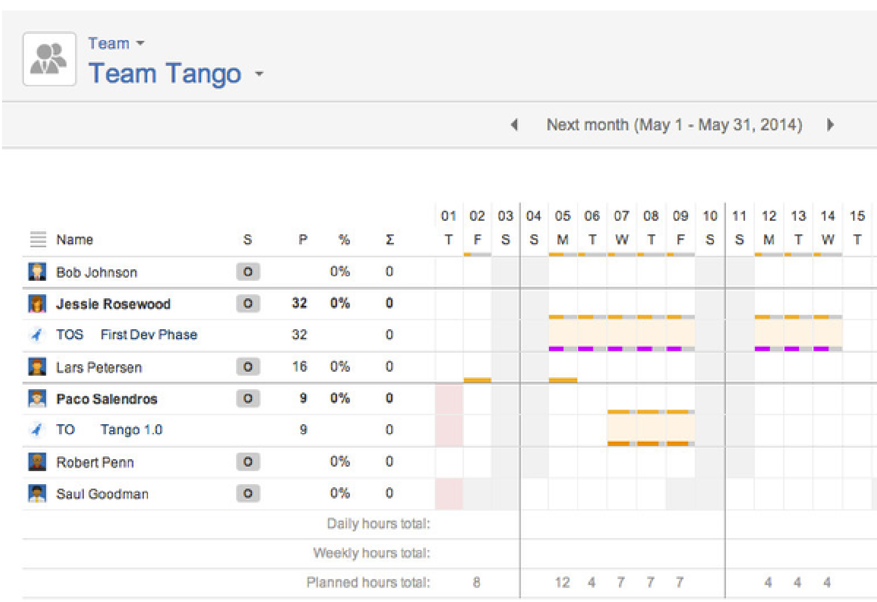
7. Click the **Save** button to save your settings for the project.

The selected colors for each project are displayed in the Timesheets.

For timesheets that are multi-user (given permissions), each user needs to be expanded to see the project colors.

The screenshot below is from a Team Timesheet for Team Tango and with users Jessie and Paco expanded.

The TO project has the default orange colour, but the TOS has been set to purple



Tempo Project Managers Role

- Tempo Project Managers role is a legacy role that is being phased out with Tempo Timesheets version 8.1. The role 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.

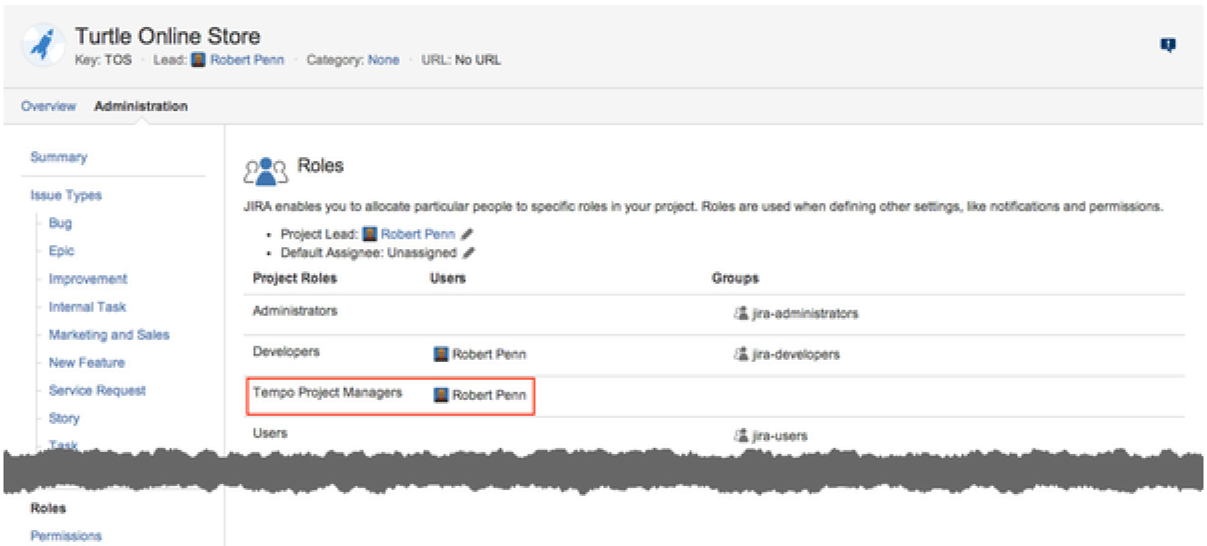
Configuring the Role

The **Tempo Project Managers** role is configured in the Administration for each JIRA Project.

To configure the Tempo Project Managers role:

1. Log in to JIRA as a Project Administrator.
2. Choose the **Projects** option from the cog icon cog wheel icon at top at top right of the screen.
   Keyboard shortcut: **g + g +** start typing **project**
3. Click on the project name from the project list, to open it's **Administration** section.
4. Open the **Roles** screen from the left sidebar, where the role is configured and/or updated.

The Roles screen in the Administration of the Turtle Online Store project (click to enlarge)



See Managing Project Roles JIRA documentation for more information on Project Roles

Tempo Tracker

The Tempo Tracker works like a stopwatch on issues in JIRA and keeps track of the time you spend working on them. Once you start working on an issue, you simply start the tracker and stop it when you are done. The tracker then pre-populates the Log Work form with the time spent, making it easy to enter your time accurately.

Related pages

- Logging Work
- Issue Log
  Work window

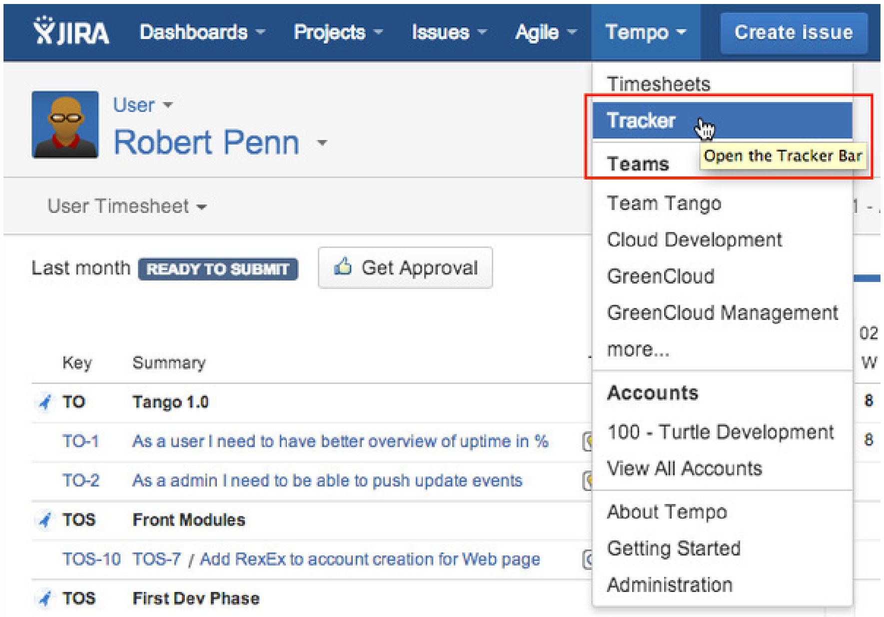
Video

Tutorial

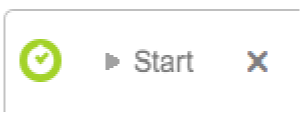
(Video without voiceover. Time: 1:00)

Accessing the Tracker

Accessing the tracker through the JIRA top navigation



Tracker Bar



When you open the Tracker Bar, it is displayed collapsed at the bottom right of the JIRA screen, with a **Start** and close (**X**) buttons. Click the Start button to start tracking time.

Once the tracker has started, it changes into a timer to show the elapsed time. An **Expand** button has also been added, along with pause and stop icons.

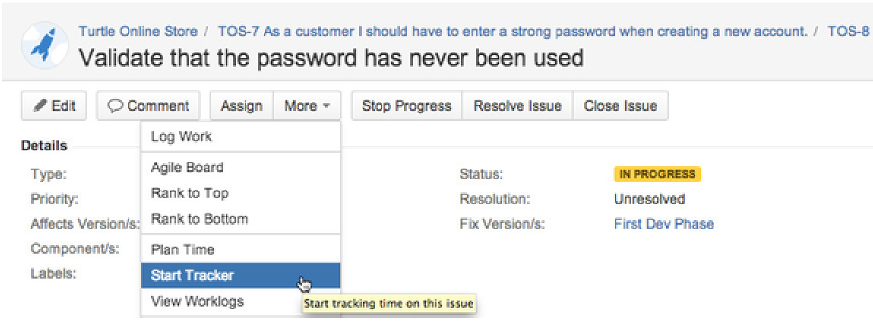
By clicking the Expand button, the Tracker Bar gets expanded to the left and the **Pause** and **Stop** b uttons are shown.

Clicking the **Stop** button opens the Log Work window for the current user, with the **Worked** field populated with the time passed.

Once the worklog has been submitted, the Tracker goes back to its initial state, as described in the first row of this table.

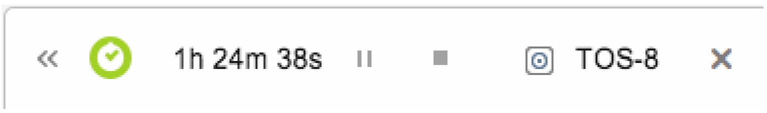
It is also possible to start the tracker from an issue, e.g. by selecting the **Start Tracker** option from the **More** actions menu.

Start Tracker from the More actions menu in an issue (click to enlarge)



The **Tracker Bar** is displayed at the bottom of the JIRA screen (initially collapsed), showing the time elapsed for the selected issue.

The Tracker Bar collapsed and running for a selected issue



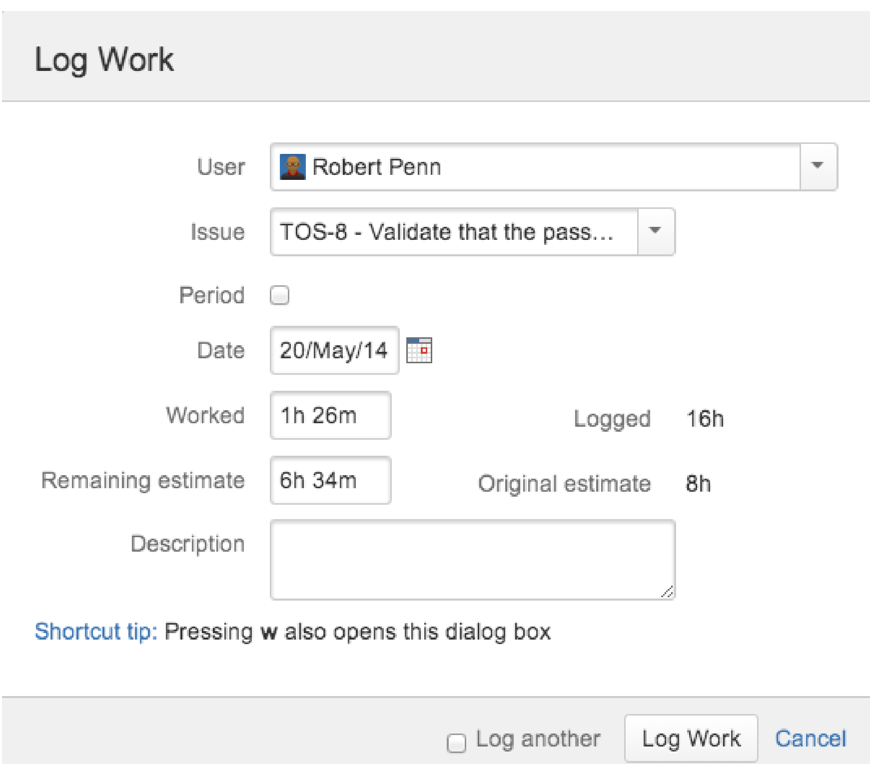
The Tracker Bar expanded and running for the selected issue

Note, that the Tracker Bar is slightly transparent. The Tempo Timesheets logo is clickable and opens the User timesheet. The JIRA Isssue Key and Summary are also a clickable link to the selected issue, in case the user has navigated away from it.

Clicking the **Stop Tracker** button opens the Log Work window for the current issue and user, with the **Worked** field populated with the time passed.

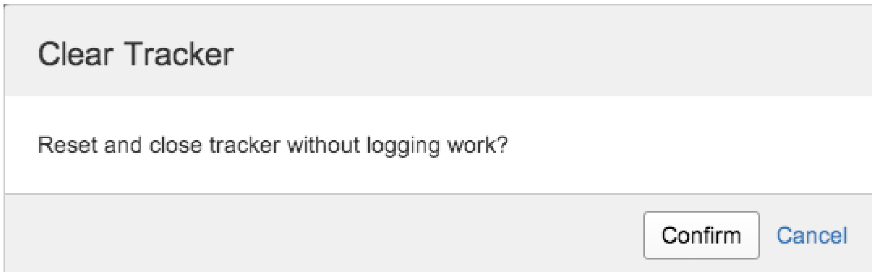
The time passed is rounded up/down to the next minute. The tracker keeps running in the background until you have clicked the **Log Work** button in the window.

The Log Work window showing elapsed time in the Worked field



To escape or clear the Tracker Bar, without logging work, click the close (**X**) button to the right in the bar. If the tracker has been running, a validation window will be displayed. Click the **Confirm** button to clear the tracker or the **Cancel** link to continue tracking your time.

The Clear Tracker confirmation window



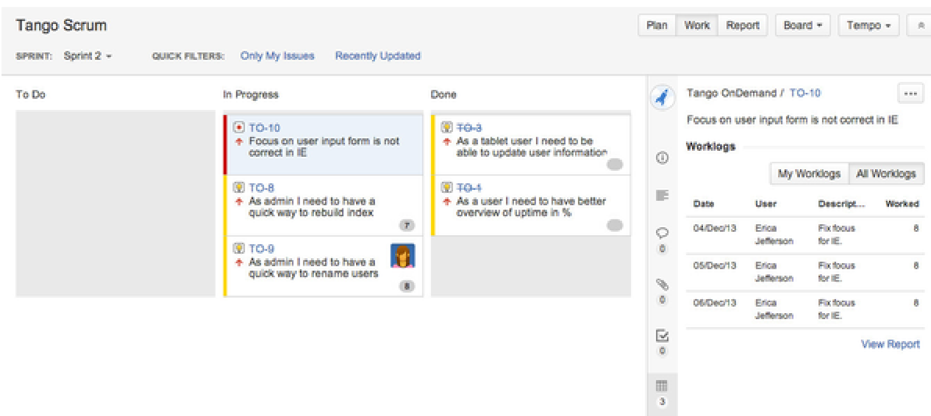
JIRA Agile Integration

This page and its child pages explain how Tempo Timesheets is integrated with JIRA Agile.

In this chapter

Worklogs in Agile Issue Detail view

A Tempo Timesheets **Worklogs** section is available in issue detail view in JIRA Agile.



This section has two buttons, **My Worklogs** and **All Worklogs**. Each shows the respective worklogs associated with the item chosen.

If you do not have View All Worklogs permission for one or more projects, only your own worklogs are displayed.

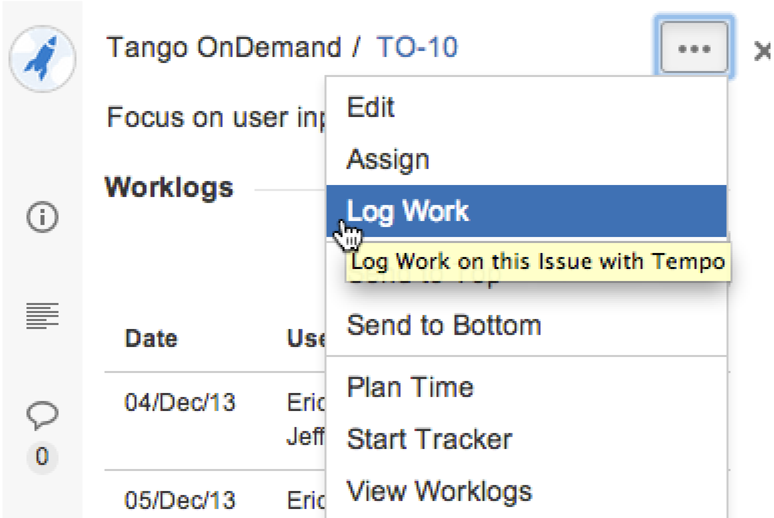
A **View Report** link is also available in the bottom right corner of this section. Clicking this link, opens the Tempo Timesheets Issue list view for the item.

Logging work from a JIRA Agile board

Tutorial

(Video without voiceover. Time: 0:33)

In the issue action list, **Log Work** opens the Log Work window.



Shortcut key to open the window is **w**.

Other Issue Actions in Agile

Several other Tempo actions are available in the issue action list:

- *Plan Time* opens the Plan Time window.
- *Start Tracker* starts the Tempo Timesheets Tracker.
- *View Worklogs* opens the Issue report view for the item.

Agile Timesheet

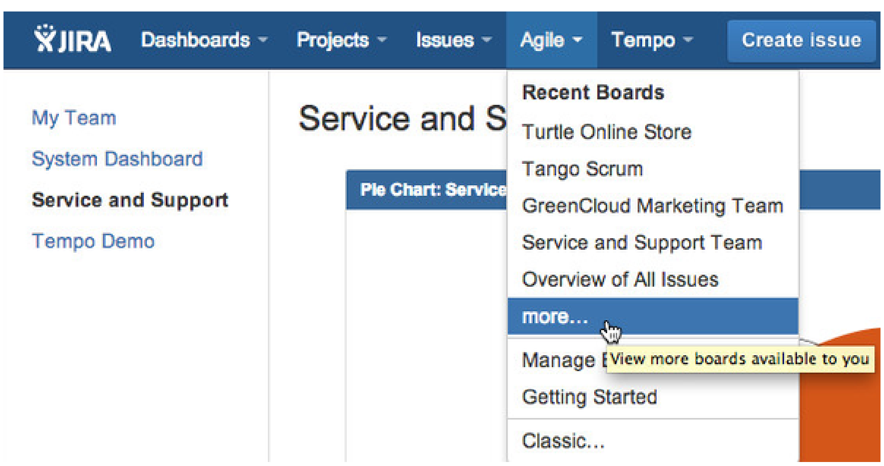
This page explains how the **Agile Timesheet** works. It is a good way to see all Tempo Timesheets worklogs associated with JIRA Agile epics and/or sprints. It is *enabled* by default in the global configuration.

On this page

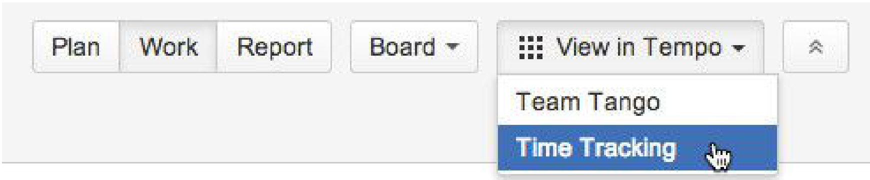
> **Note**
> The Agile Timesheet is available only if you have JIRA Agile or JIRA Software installed and if your JIRA version is 6.4.12 or later.

Accessing Agile Timesheet

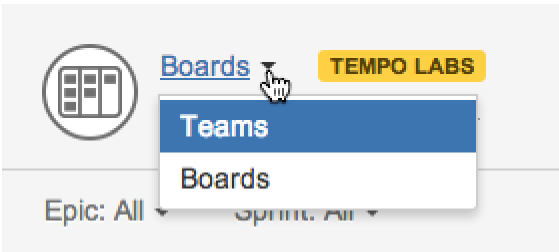
To access the Agile Timesheet in Tempo select a board in Agile menu select a Scrum or Kanban board, by clicking on the Board Name link



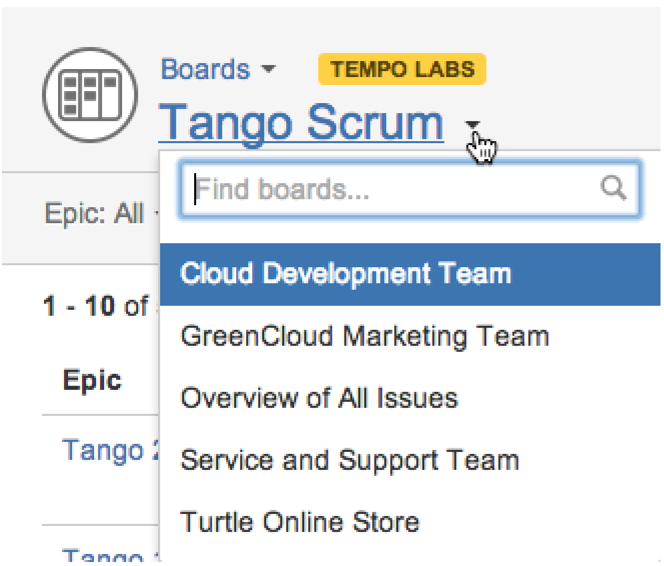
On the selected board you click the Time Tracking link to view the Agile Timesheet for the board.



The header for the Agile Timesheet has two menus available to the left, Teams and Boards

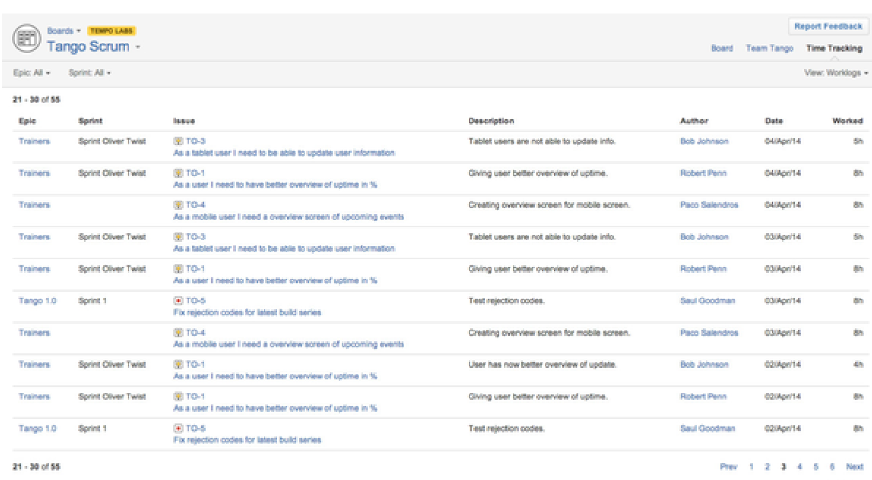


You can view other Timesheets by selecting Boards and search for other boards in your system.



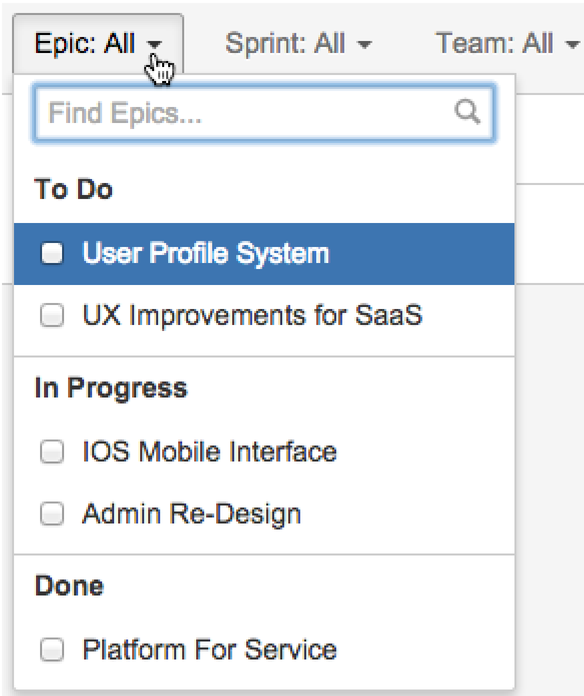
Issue Grouping

Worklogs from one or more **Epics** and **Teams** for both Scrum and Kanban boards are displayed in Agile Timesheet



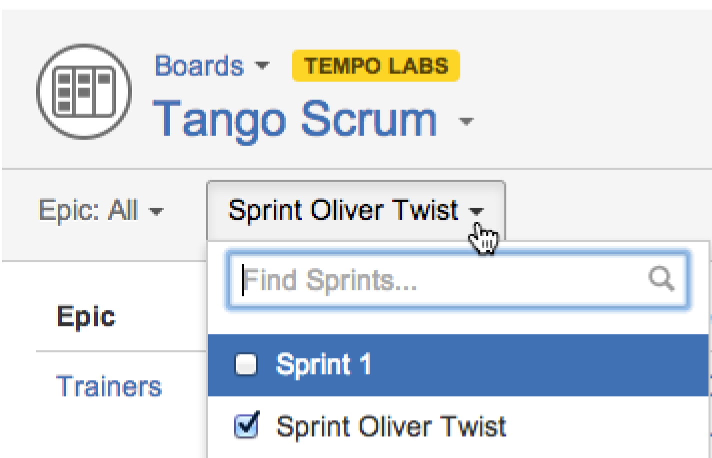
Only your own worklogs are displayed if you do not have View All Worklogs permission for the project.

The epics are grouped by epic status (To Do, In Progress and Done) in the menu.



Scrum boards can also be refined by **Sprints**.

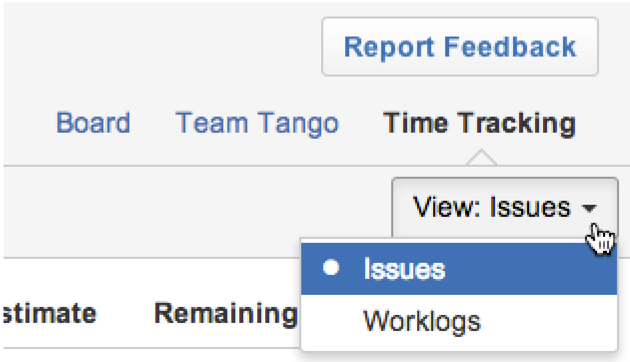
The active sprint is selected by default, but if there is no active sprint - *Sprint: All* is selected.



Select the epics and/or sprints you want to filter by - either by selecting them directly from the list or by using the find field first and then selecting an item.

The timesheet refreshes automatically, as soon as an item is selected in one of the menus.

The timesheet can also be viewed for Issues (default) and Worklogs.



- The items in the **Epic** and **Issue** columns, are links to the JIRA Issues.
- For **Worklogs** view:
  - The **Description** column, lists the descriptions given in the Log Work window.
  - The worklog owner name in the **Author** column is a link to the Author's JIRA Profile page.
  - The Date column lists when the worklog was created. *The sorting of the page is based on this column with the latest date at the top.*
    If Log work with start time is set in Tempo Global Configuration, this format would be displayed in the column.
- For **Issues** view:
  - The **Original** and **Remaining Estimates** are displayed from the issue.
- The Worked column shows how many hours were logged on the JIRA Issue.
  The format used on the form is "2h 15m", rather than 2.25.

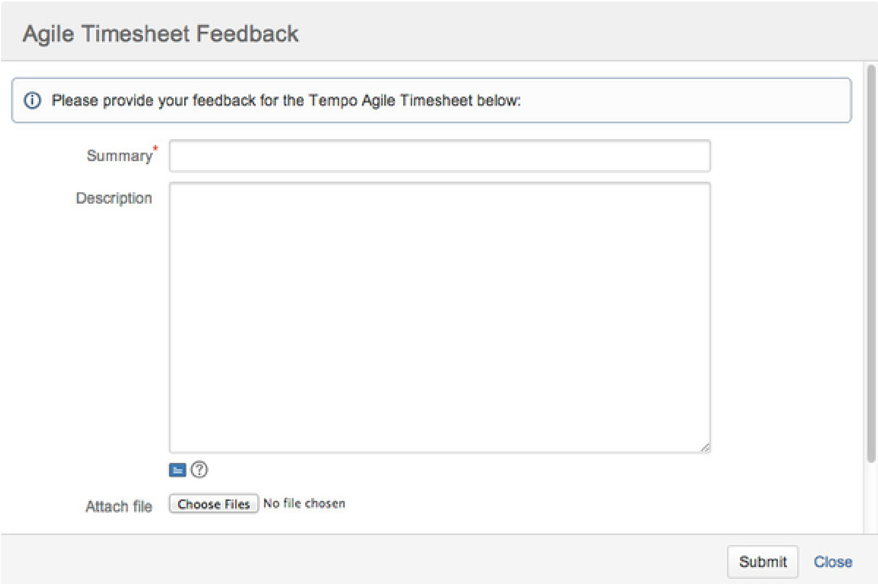
Pagination

- The screenshot shows that the Page Size is set to 10, showing worklogs 41 - 50 of 1569.
  The JIRA default setting for the Page Size is 50.

- To navigate between pages, click the page numbers in the bottom right corner or use the **Prev** or **Next** links.
  For large sets of worklogs, two more navigation links are added for the **First** and **Last** page.
- Below the page navigation, the total worklog hours are shown for the page, out of the total number for the Epic/Sprint selection.

Report Feedback

- The Agile Timesheet is an experimental feature. A **Report Feedback** button is located in the upper right corner.



To send feedback, fill in at least the **Summary** field, and click **Submit**.

A JIRA Issue is created for the Tempo team.

Tempo Gadgets

The Tempo Timesheets gadgets allow users to track time spent on accounts, to monitor their teams' tracked time and resource allocation, and to chart this information visually. The gadgets can be added both on a JIRA Dashboard and on a page within Confluence. This page gives an overview for the gadgets and how to add them to a dashboard.

In this chapter

Video

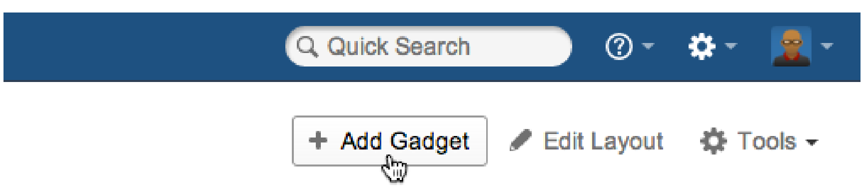
Permissions
You need the Approve Timesheets permissions to see some data in the Tempo accounts gadgets and Tempo teams gadgets. All Tempo users can see data in Tempo user gadgets.

Adding a Gadget

To add a Tempo gadget to a Dashboard, do the following:

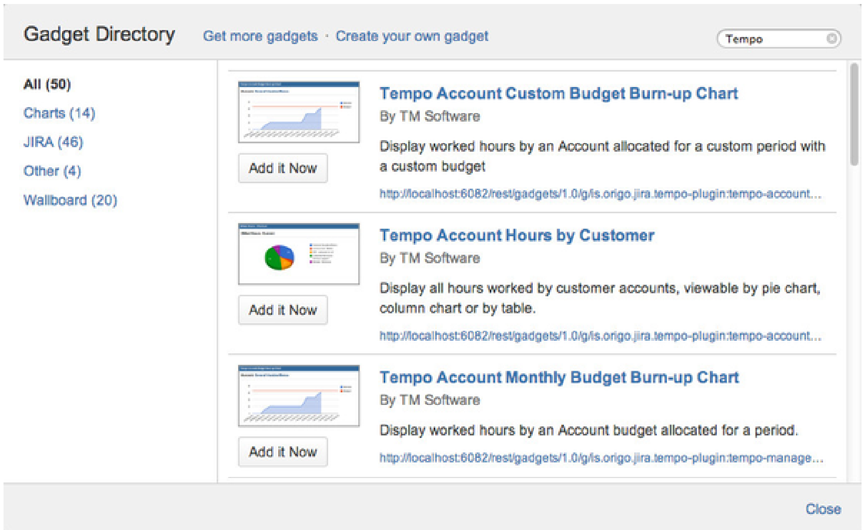
1. Go to your JIRA Dashboard and click the **Add Gadget** button.

   The Add Gadget button



2. The **Gadget Directory** will appear. Locate a **Tempo** gadget of your choice or write Tempo in the search field to narrow the selection.

   The JIRA Gadget Directory; Choose a Tempo gadget (click to enlarge)



3. Click the **Add it Now** button, for the chosen gadget (repeat this step as needed).
4. When finished click the **Close** link in the right bottom corner of the Gadget Directory.
5. The Tempo gadget(s) will appear on your dashboard and ready for you to configure.

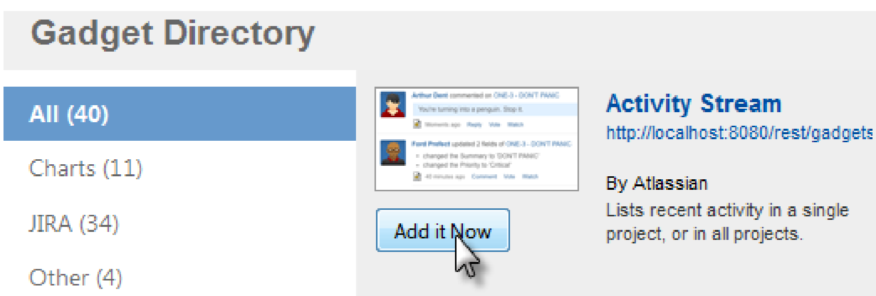
> The images used in Tempo gadgets are generated by using the **Chart API** from **Google**. This means that in order for the Tempo gadgets to work, your computer needs to be **onli ne**.

Tempo activity stream provider

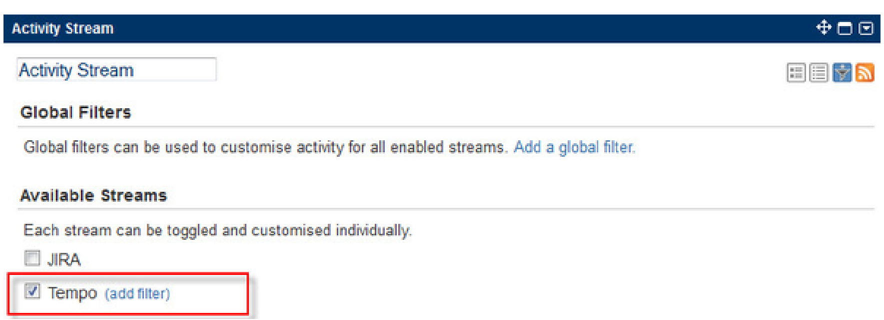
In this chapter

This page explains that Tempo data is provided to the Activity Stream gadget. Select **Activity Stream** from the *Gadget Directory* and click **Add it Now** button.

Adding the Activity Stream gadget



Configuring the Activity Steam gadget to include Tempo



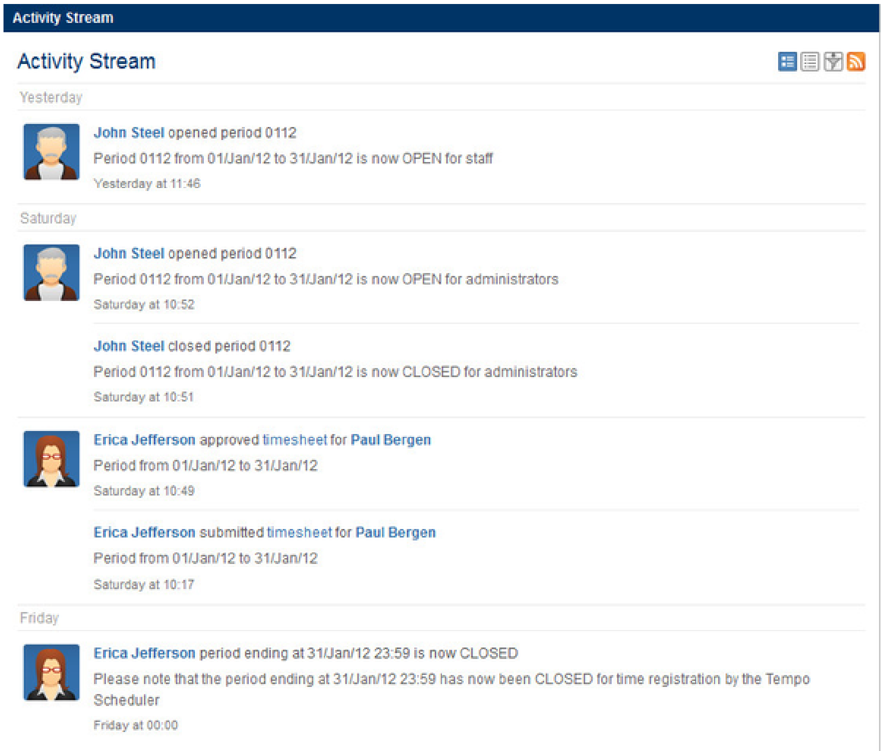
To add the *Gadget* do the following:

1. Select **Tempo** from the list of **Available Streams**

2. Select your preferred *Limit* and *Refresh* rate in the *Display Options*
3. Click the **Save** button.

The *Activity Stream* is displayed on your *Dashboard* showing recent activities from Tempo.

The Activity Stream gadget on a dashboard



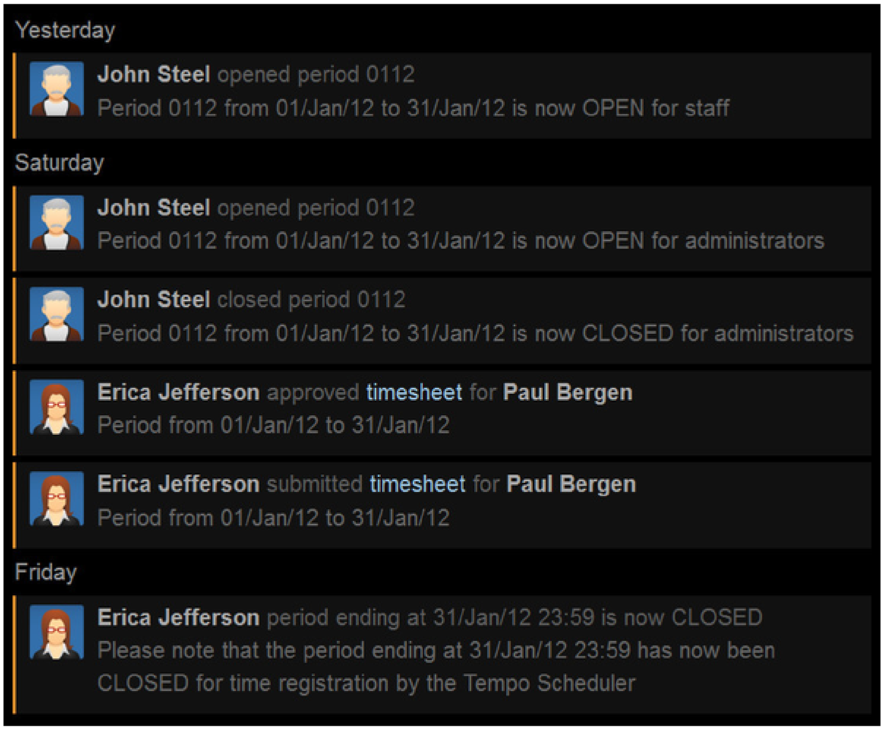
The **Tempo Activities** added to the stream are the following:

1. When period is closed by the Scheduler.
2. When period status is changed in Period management.
3. When a Grace Period is granted to a user.
4. A user clicks the **Get Approval** button and the timesheet status is changed from *READY TO SUBMIT* to *WAITING FOR APPROVAL*
5. A User Timesheet is **Approved** by the Team Lead and the status is changed from *WAITIN G FOR APPROVAL* to *APPROVED*
6. A User Timesheet is **Rejected** by the Team Lead and the status is changed from *WAITIN G FOR APPROVAL* to *READY TO SUBMIT*
   The Timesheet Approval Process has to be enabled in the last 3 *Activities*

1-2 are **global**, which means that the entries are in the Activity Stream for all Tempo Users
3-6 are added to the Activity Stream for the engaged users (a member of a team and her/his Team Lead selected as a *Supervisor* in User preferences).

The Activity Stream can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard



Tempo accounts gadgets

Gadgets for Managers

In this chapter

These gadgets display worklog and Tempo Account data and are only available for users with the Approve Timesheet permission for any Tempo team.

Account Hours by Customer
Plan, track, and allocate account resources for a designated period. View data in pie chart, bar chart or table format.

Total Hours
Track overall worked and/or planned time. View data in pie chart, bar chart or table format.

Account Custom Budget Burn-up Chart
Create a custom burn-up chart to monitor the progress of accounts, but also to plan and allocate resources accordingly.

Account Monthly Budget Burn-up Chart
Display the progress of hours worked by an account and its monthly budget. Plan, allocate, monitor resources and account budget projections.

Account Custom Budget Burn-up Chart

In this chapter

This is a child page of Tempo Gadgets, explaining the **Account Custom Budget Burn-up Chart** gadget. This gadget displays the progress of hours worked on an Account and allows the user to insert a custom budget (Insert goal) and period. The gadget provides great flexibility in how data is visualized for a given account. This gadget is a great addition for *Managers* and *Executives* to monitor progress on Accounts, and to plan and allocate resources accordingly.

Required permission

Approve Timesheet Tempo Team permission

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The screenshot below shows the default configuration for this gadget, when it has just been added to a dashboard. The table below lists the configuration options, for each field or drop-down list in the gadget.

Default Configuration for the Account Custom Budget Burn-up Chart

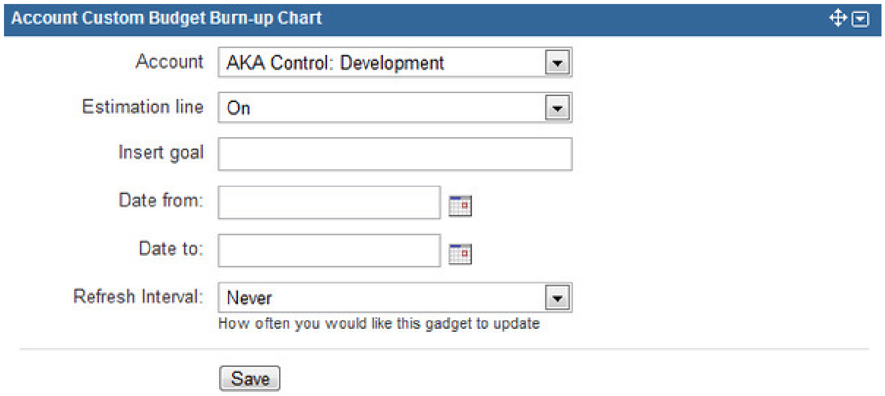


Table: Configuration options for each entry or field

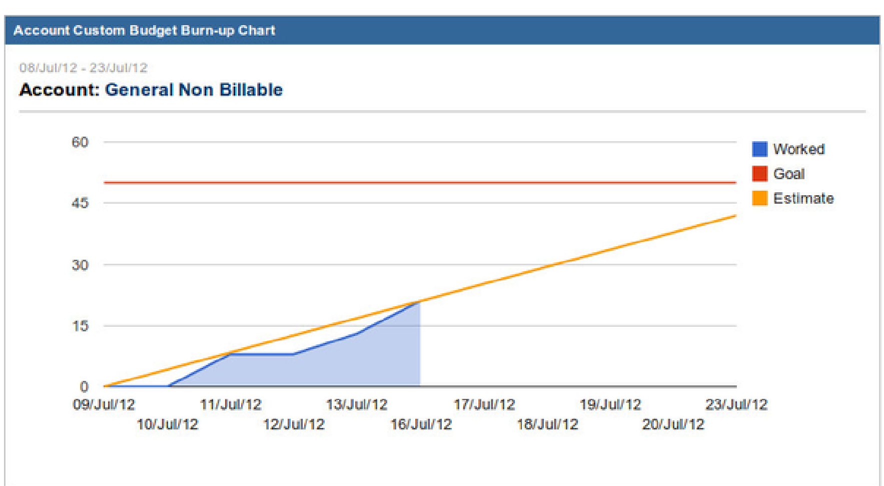
Configuration Entry	Available Options
Account	All accounts already created through Tempo Accounts. The default account is the first in the alphabet.
Estimation line	It can either be **On** or **Off**. It is On by default.
Insert goal	This is any custom budget number, which will be displayed as a **Goal** line on the graph created.
Date from/to	Set a start and end date to define the date range to be displayed.
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Every 30 Minutes*, *Every 1 hour* or *Every 2 hours*. The value says how often you would like the gadget to update the list of issues associated to the account.

When all the configuration options have been set, click the **Save** button to display the results in a graph - see screenshots below.

Gadget display

Examples of data displayed in this gadget are given below.

For the General Non Billable account, the Goal is set to 50 and an estimation line shows forecast



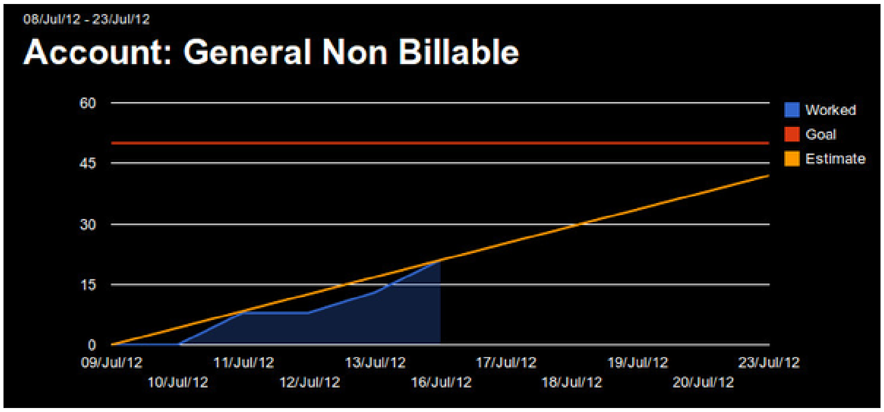
The estimation line displays a forecast of how the progress will be later in the period.

If no goal is inserted, the goal is automatically set to 0.

The **Account** name is an active link to the Account Timesheet for the selected account. This gadget is similar to the Account Monthly Budget Burn-up Chart gadget, but it provides more flexibility in choosing a custom goal (instead of a pre-determined monthly budget) and period.

The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard



Account Hours by Customer

This is a child page of Tempo Gadgets, explaining the **Account Hours by Customer** gadget. This gadget displays hours worked on each account during a chosen period, for a selected Customer. This gadget is a great addition for *Managers* and *Executives* to track, plan, and allocate their resources.

In this chapter

Required permission

Approve Timesheet Tempo Team permission

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The table below lists the configuration options, for each field or drop-down list in the gadget

Default Configuration for the Account Hours by Customer

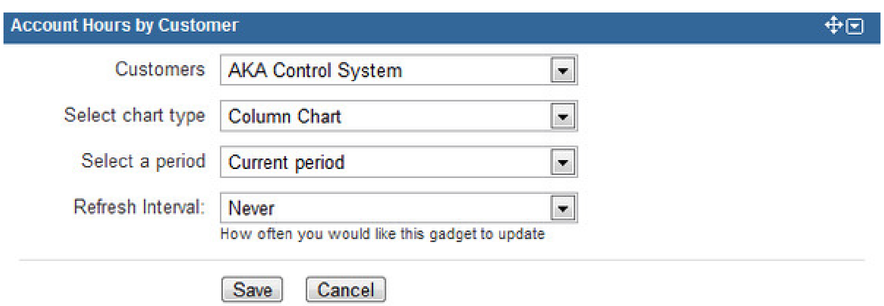


Table: Configuration options for each entry or field

Configuration Entry	Available Options
Customers	All accounts by customers already created through Tempo Accounts. The default customer is the first in the alphabet.

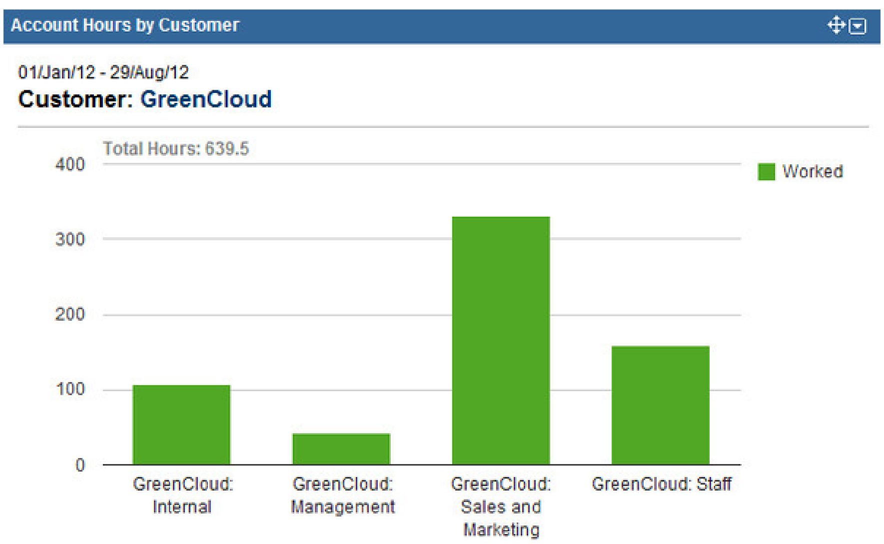
Select chart type	*Column Chart*, *Pie Chart with Numbers*, *Pie Chart with Percentages* or *Table*.
Select a period	Choose the *Current period* or *Previous period*, as configured in the Period Configuration. Other values are Week (current week), Q1, Q2, Q3, Q4 (quarters of the year) or YTD (year-to-date)
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Ever y 30 Minutes*, *Every 1 hour* and *Every 2 hours*. The value says how often you would like the gadget to update the list of associated issues.

When all the configuration options have been set, click the **Save** button to display the results in the chosen chart type - see screenshots below.

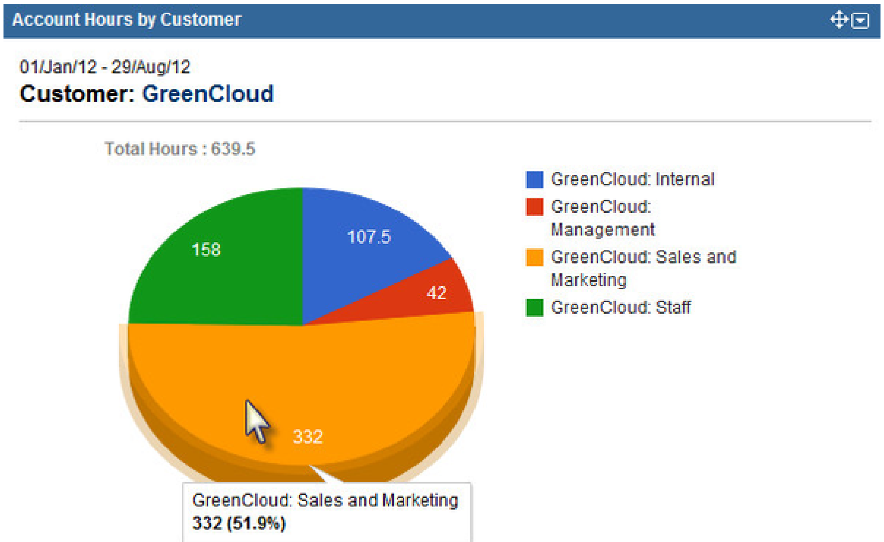
Gadget display

Examples of data displayed in this gadget are given below. Hover over the columns or the slices to view more details. The **Customer** name is a link to view the Account Timesheet for the selected customer.

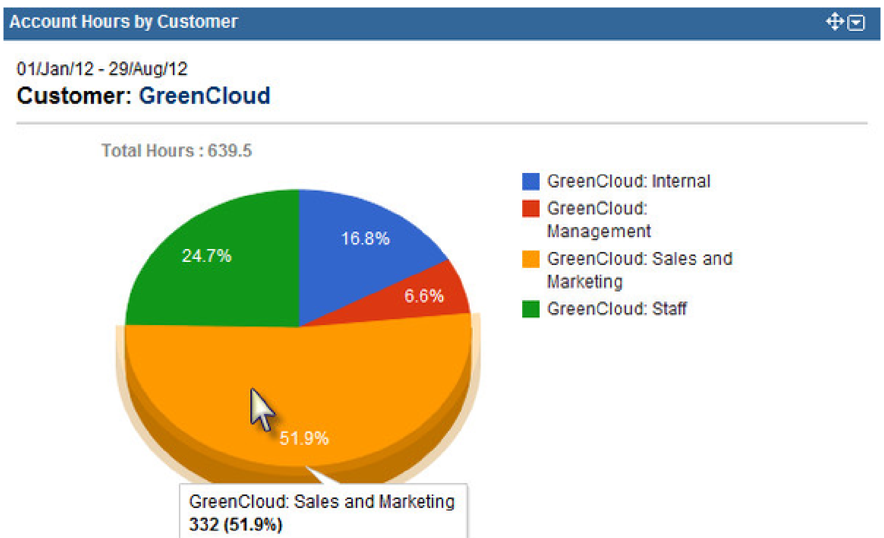
Column Chart for the GreenCloud customer



Pie Chart with Numbers, for the GreenCloud customer



Pie Chart with Percentages, for the GreenCloud customer



Data displayed in a Table, for the GreenCloud customer

Account Hours by Customer

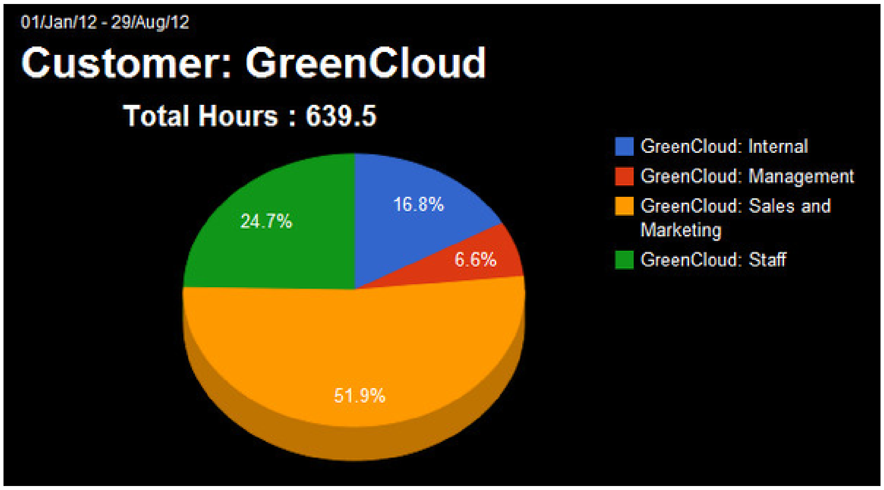
01/Jan/12 - 29/Aug/12

Customer: GreenCloud

Account		Worked	%
GreenCloud: Internal		107.50	16.81 %
GreenCloud: Management		42.00	6.57 %
GreenCloud: Sales and Marketing...		332.00	51.92 %
GreenCloud: Staff		158.00	24.71 %
	Total:	639.50	100 %

The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard



Account Monthly Budget Burn-up Chart

This is a child page of Tempo Gadgets, explaining the **Account Monthly Budget Burn-up Chart** gadget. This gadget displays the progress of hours worked on an Account and its monthly budget. This gadget is a great addition for *Managers* and *Executives* to monitor progress on Accounts, and to plan and allocate resources accordingly.

In this chapter

Required permission

Approve Timesheet Tempo Team permission

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The screenshot below shows the default configuration for this gadget, when it has just been added to a dashboard. The table below lists the configuration options, for each field or drop-down list in the gadget

Default Configuration for the Account Monthly Budget Burn-up Chart

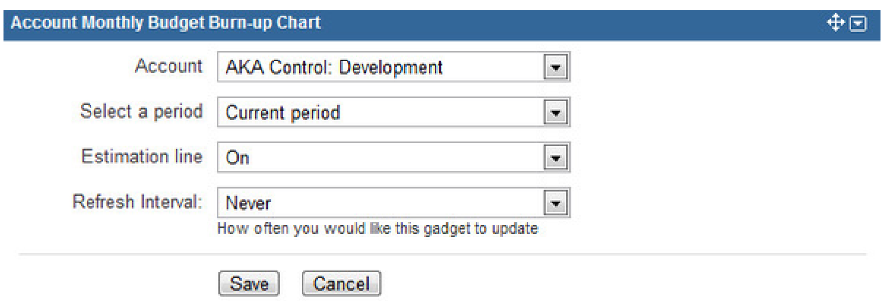


Table: Configuration options for each entry or field

Configuration Entry	Available Options
Account	All accounts already created through Tempo Accounts. The default account is the first in the alphabet.
Select a Period	The period can either be *Current period* or *Previous period*, as configured in Period Configuration.
Estimation line	It can either be **On** or **Off**. It is On by default.

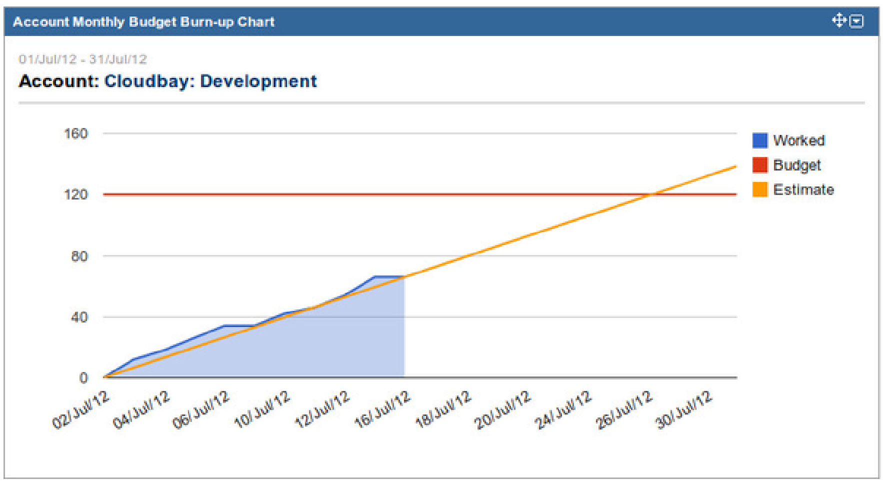
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Ever y 30 Minutes*, *Every 1 hour* and *Every 2 hours*. The value says how often you would like the gadget to update the list of issues associated to the account.

When all the configuration options have been set, click the **Save** button to display the results in a graph - see screenshots below.

Gadget display

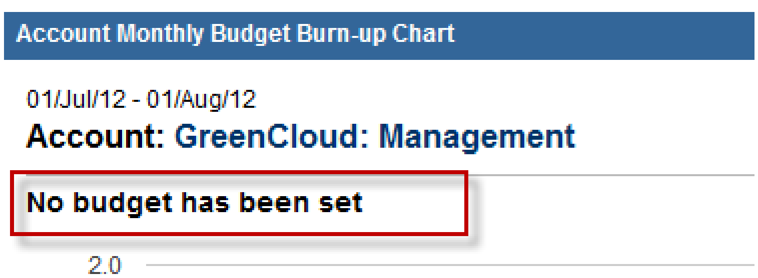
Examples of data displayed in this gadget are given below.

For the Cloudbay: Development account, the budget is set to 120 and an estimation line shows forecast



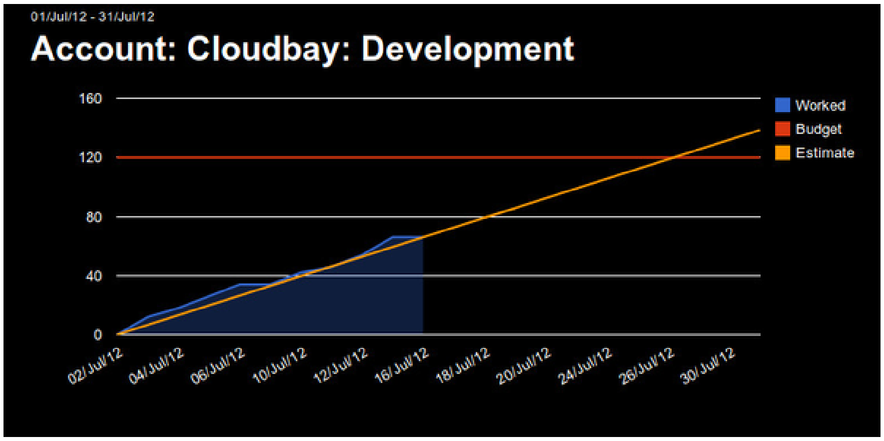
The estimation line displays a forecast of how the progress will be later in the period. The **Account** name is an active link to the Account Timesheet for the selected account. If no monthly budget is set for a chosen account, a message is displayed and the budget line is shown at 0 hours.

No budget has been set



The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard



Total Hours

This is a child page of Tempo Gadgets, explaining the **Total Hours** gadget. This gadget displays worked and/or billed hours for all accounts, customers and categories. This gadget is a great addition for *Managers* and *Executives* to track overall worked and/or billed time.

In this chapter

Required permission

Approve Timesheet Tempo Team permission

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The table below lists the configuration options, for each field or drop-down list in the gadget.

Default Configuration for the Total Hours gadget

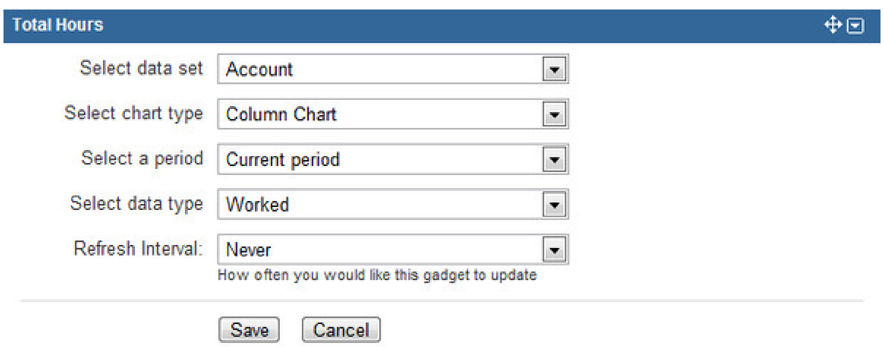


Table: Configuration options for each entry or field

Configuration Entry	Available Options
Select data set	*Account*, *Categories* or *Customer*, as already created through Tempo Accounts.
Select chart type	*Column Chart*, *Pie Chart with Numbers*, *Pie Chart with Percentages* or *Table*.
Select a period	The period can either be *Current period* or *Pre vious period*, as configured in Period Configuration.

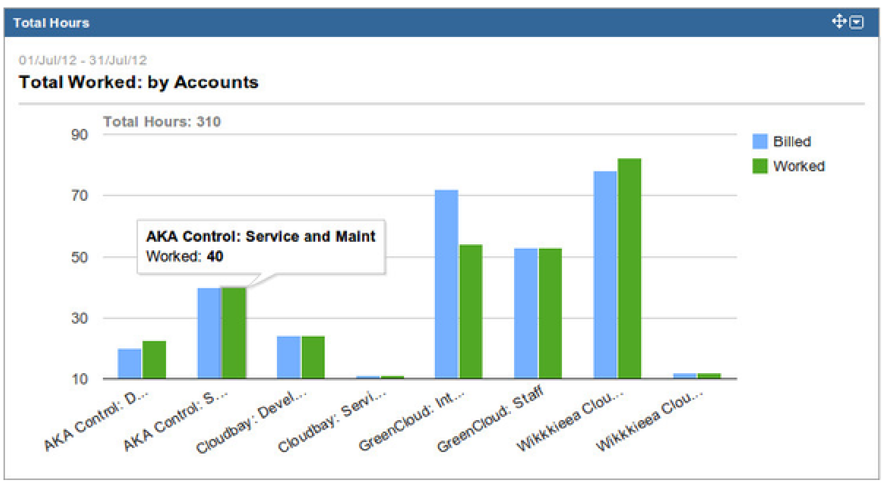
Select data type	The types are *Worked*, *Billed* or *Billed and Worked*. The billed hours options, have to be set in the Global Configuration, for the two latter values to be available.
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Ever y 30 Minutes*, *Every 1 hour* or *Every 2 hours*. The value says how often you would like the gadget to update the list of associated issues.

When all the configuration options have been set, click the **Save** button to display the results in a graph - see screenshots below.

Gadget display

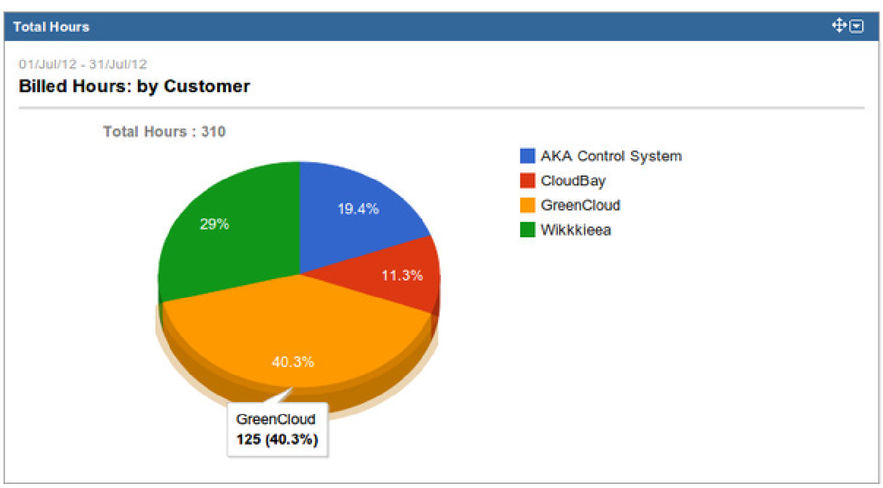
Examples of data displayed in this gadget are given below. Hover over the columns or slices displayed to set more details. The Accounts**,** Customer or Categories have an active link to the appropriate details page.

Column Chart for Total Worked by Accounts

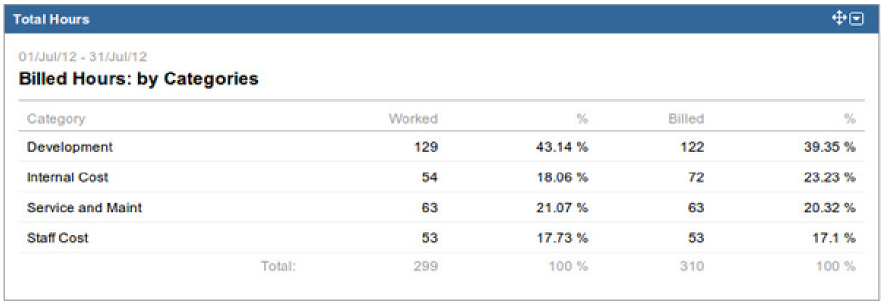


The Pie Chart with Numbers is not shown, but the Pie Chart with Percentages is shown below.

Pie Chart with Percentages for Billed Hours by Customer



The data displayed in a Table, for Billed Hours by Categories



Total Hours

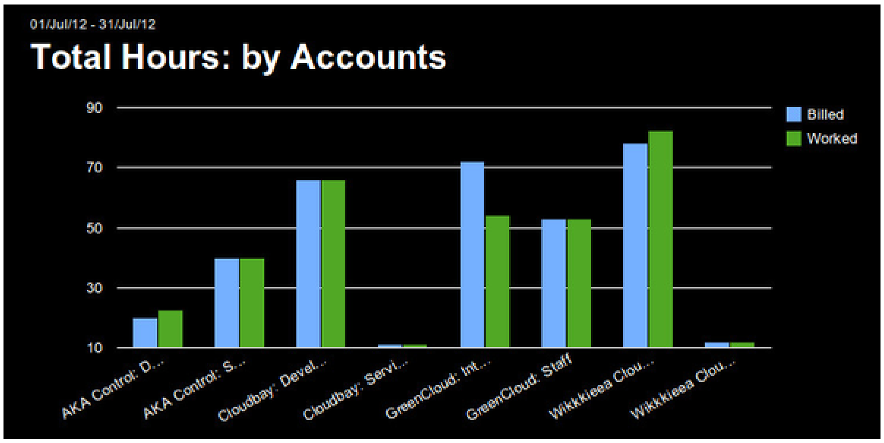
01/Jul/12 - 31/Jul/12

Billed Hours: by Categories

Category	Worked	%	Billed	%
Development	129	43.14 %	122	39.35 %
Internal Cost	54	18.06 %	72	23.23 %
Service and Maint	63	21.07 %	63	20.32 %
Staff Cost	53	17.73 %	53	17.1 %
Total:	299	100 %	310	100 %

The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Total Hours by Accounts, on a JIRA Wallboard



Tempo teams gadgets

Gadgets for a Team Lead

In this chapter

These gadgets display worklog and planned data for team members. These gadgets are available only for users with View All Worklogs permission for a team's projects.

Team Hours
Display planned, worked, and required hours for each team member to track overall planned and worked time.

Team Timesheet
Display a team's timesheet for a designated period to track overall planned and worked time.

Planned Time by Team
Plan team time for a designated period by displaying planned and unplanned time, viewable in area chart, pie chart, bar chart or table format.

People in Version
This gadget displays worked and planned hours for each user in the selected version.

People in Version

In this chapter

This is a child page of Tempo Gadgets, explaining the **People in Version** gadget. This gadget displays worked and planned hours for each user in the selected version.

For planned hours to be displayed, the following check box must be selected in Global Configuration:
'**Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets.**'

Required **permission**

- Approve Timesheet permission
- View All Worklogs permission for the team's projects.

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The table below lists the configuration options, for each field or drop-down list in the gadget.

Default Configuration for the People in Version gadget

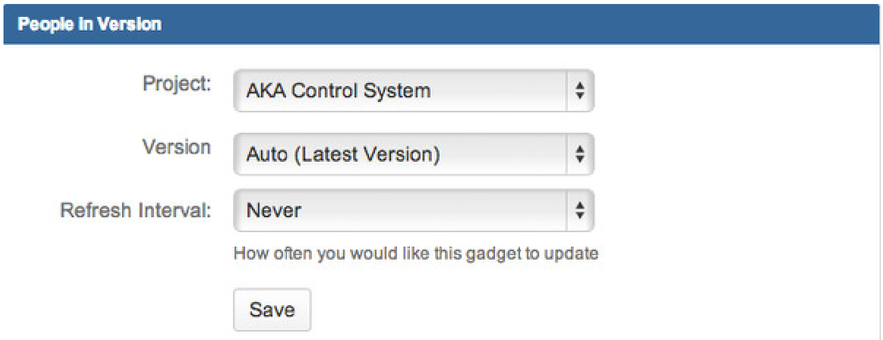


Table: Configuration options for each entry or field

Configuration Entry	Available Options
Project	All available projects for the current user.
Version	List of all versions available for the chosen JIRA Project.
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Every 30 Minutes*, *Every 1 hour* or *Every 2 hours*. The value says how often you would like the gadget to update the list of associated issues.

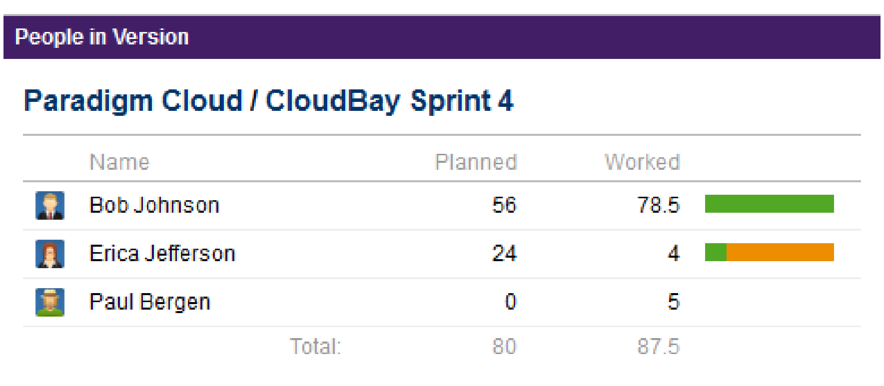
When all the configuration options have been set, click the **Save** button to display the results in a graph - see screenshots below.

Gadget display

Examples of data displayed in this gadget are given below. A *Status Bar* is displayed if the user has been planned on the selected version. The status bar is showing the worked/planned ratio.

The planned colour is **orange** and the worked colour is **green**. You can see below that Erica has worked 4 hours of the 24 hours planned for the CloudBay Sprint (version) 4.

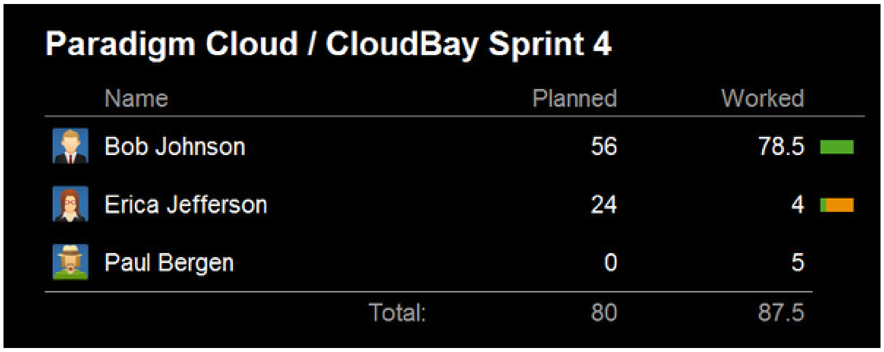
Results for the People in Version gadget



The JIRA Project and Version links are active in the gadget and open the People page for the selected option.

The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard



Planned Time by Team

This is a child page of Tempo Gadgets, explaining the **Planned Time by Team** gadget. This gadget displays planned and unplanned time in the future for a given team.

In this chapter

For this gadget to be available, the following check box must be selected in Global Configuration: '**Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets**'

This gadget is great for *Team Leads* and *Executives* to track overall planned time from a current date.

Required **permission**

Approve Timesheet permission

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The table below lists the configuration options, for each field or drop-down list in the gadget.

Default Configuration for the Team Time by Team gadget

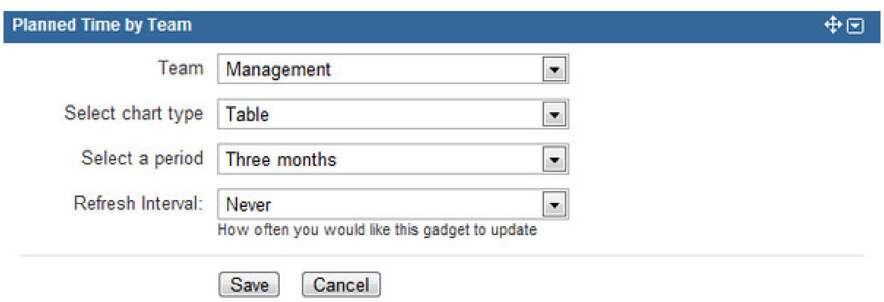


Table: Configuration options for each entry or field

Configuration Entry	Available Options
Team	All teams that the current user has Approve Timesheet permission for.
Select chart type	The available types are: *Area Chart*, *Column Chart*, *Pie Chart with Numbers*, *Pie Chart with Percentages* or *Table*.
Select a period	All the options start with the *current date* for each period. The options are *One week*, *Two weeks*, *Three weeks*, *One month*, *Two months* or *Three months*.

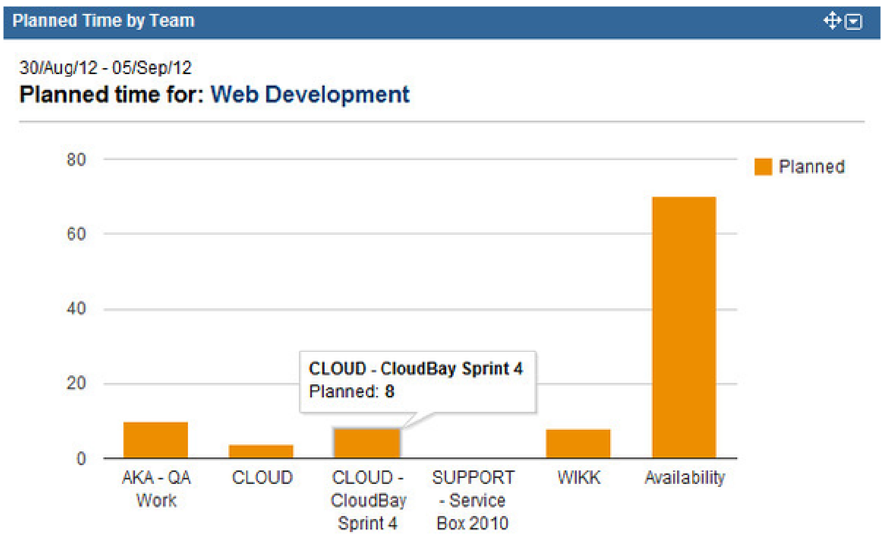
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Every 30 Minutes*, *Every 1 hour* or *Every 2 hours*. The value says how often you would like the gadget to update the list of associated issues.

When all the configuration options have been set, click the **Save** button to display the results in a graph - see screenshots below.

Gadget display

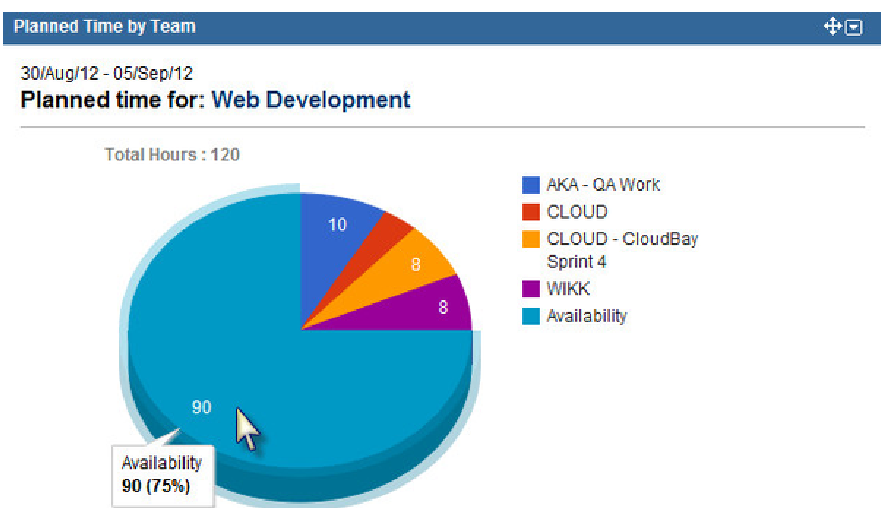
Examples of data displayed in this gadget are given below. Hover over the items on the charts to see more detail.

Column Chart with Planned time for the Web Development team

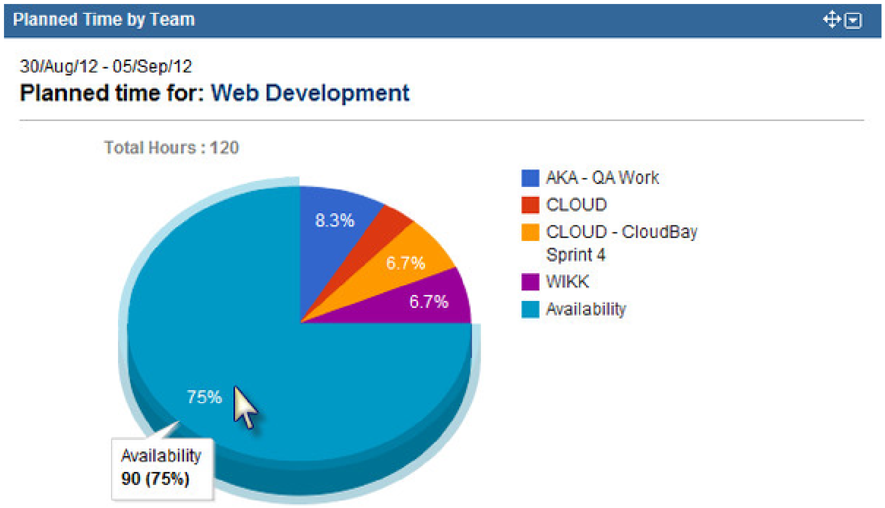


The team name is an active link to the Team Timesheet for the selected team.

Pie Chart with Numbers for the Web Development team and its planned time



Pie Chart with Percentages for the Web Development team and its planned time



Same data as above in a Table, for the Web Development team and its planned time

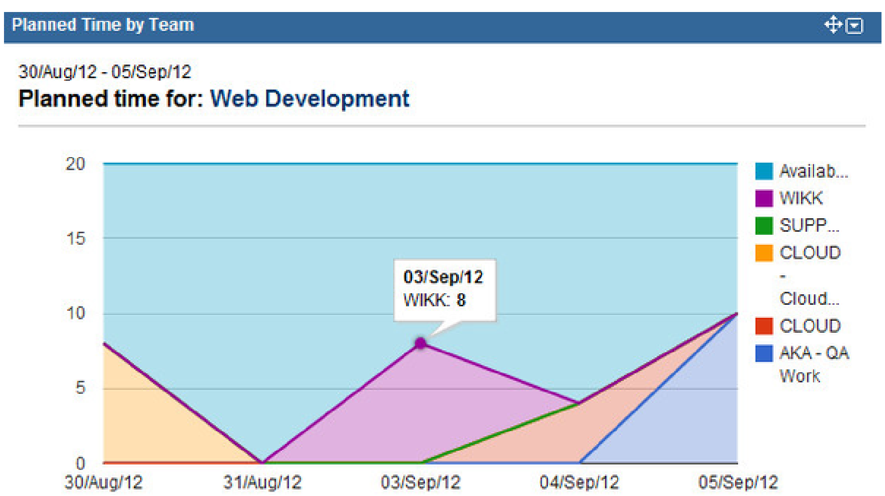
Planned Time by Team

30/Aug/12 - 05/Sep/12

Planned time for: Web Development

Activity		Planned	%
AKA - QA Work		10.00	8.33 %
CLOUD		4.00	3.33 %
CLOUD - CloudBay Sprint 4		8.00	6.67 %
SUPPORT - Service Box 2010		0.00	0 %
WIKK		8.00	6.67 %
Availability		90.00	75 %
	Total:	120	100 %

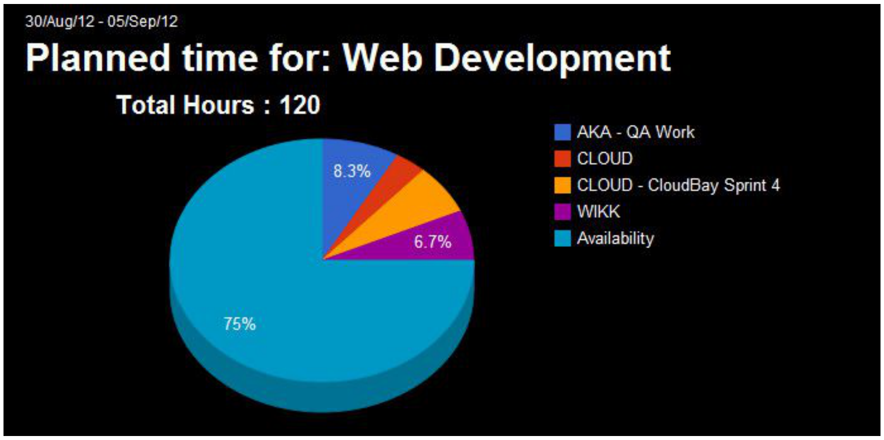
Same data shown on Area Chart, for the Web Development team and its planned time



Note that the Area Chart is a great view for the Lead of the team, to see when the team's resources are available for new projects.

The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard



Team Hours

In this chapter

This is a child page of Tempo Gadgets, explaining the **Team Hours** gadget. This gadget displays planned, worked, and required hours for each team member.

For planned hours to be displayed, the following check box must be selected in Global Configuration:
'**Users with Plan Time permission for a team can plan time for team members in Tempo Timesheets.**'

This gadget is great for *Team Leads* and *Executives* to track overall planned and worked time.

Required **permission**

- Approve Timesheet permission
- View All Worklogs permission for the team's projects.

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The table below lists the configuration options, for each field or drop-down list in the gadget.

Default Configuration for the Team Hours gadget

Table: Configuration options for each entry or field

Configuration Entry	Available Options
Team	All teams that the current user has Approve Timesheet permission for.
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Ever y 30 Minutes*, *Every 1 hour* or *Every 2 hours*. The value says how often you would like the gadget to update the list of associated issues.

When all the configuration options have been set, click the **Save** button to display the results in a graph - see screenshots below.

Gadget display

Examples of data displayed in this gadget are given below.

Team Hours for the Web Development team displaying the team members with logged and/or planned time.

Team Hours

Web Development

Name		Required	Planned	Worked
Bob Johnson	-	176	32	45
Paul Bergen	-	176	15	0
	Total:	352	47	45

The team name is an active link to the Team Timesheet for the selected team.

The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard

Web Development

Name		Required	Planned	Worked
Bob Johnson	-	176	32	45
Paul Bergen	-	176	15	0
	Total:	352	47	45

Team Timesheet Gadget

This is a child page of Tempo Gadgets, explaining the **Team Timesheet** gadget. This gadget displays a team's timesheet for a selected period. This gadget is a great for *Team Leads* and *Exec utives* to track overall worked time for a given team.

In this chapter

Required **permission**

- Approve Timesheet permission
- View All Worklogs permission for the team's projects.

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The table below lists the configuration options, for each field or drop-down list in the gadget.

Default Configuration for the Team Timesheet gadget

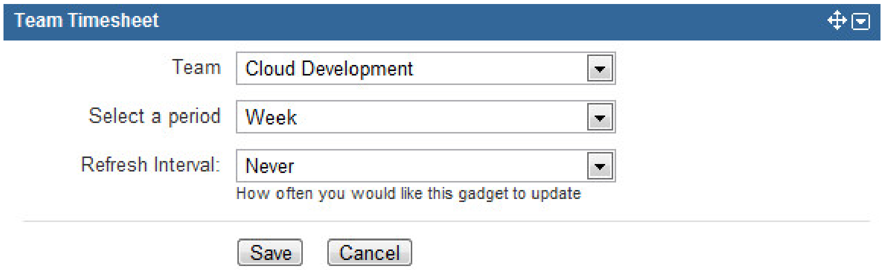


Table: Configuration options for each entry or field

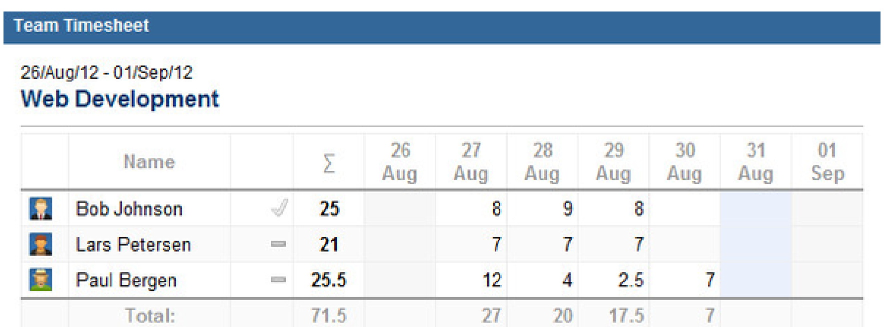
Configuration Entry	Available Options
Team	All teams that the current user has Approve Timesheet permission for.
Select a period	The *Current period* or *Previous period* as configured in Period Configuration, *Week* (curr ent week) or *Two weeks* (current and previous week).
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Ever y 30 Minutes*, *Every 1 hour* or *Every 2 hours*. The value says how often you would like the gadget to update the list of associated issues.

When all the configuration options have been set, click the **Save** button to display the results in a graph - see screenshots below.

Gadget display

Examples of data displayed in this gadget are given below.

Team Timesheet for the Web Development team



The team name and each user name, are active links to the respective Team Timesheet and U ser timesheet.

If the Timesheet Approval Process is enabled and its set period matches the one selected in the gadget, the workflow status is also displayed.

In the screenshot above, the **Week** period was selected and it is the same as in the **Timesheet Approval Process** configuration.

The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard

26/Aug/12 - 01/Sep/12
Web Development

	Name		Σ	26 Aug	27 Aug	28 Aug	29 Aug	30 Aug	31 Aug	01 Sep
	Bob Johnson	25	**25**		8	9	8			
	Lars Petersen	21	**21**		7	7	7			
	Paul Bergen	25.5	**25.5**		12	4	2.5	7		
	Total:		**71.5**		**27**	**20**	**17.5**	**7**		

Tempo user gadgets

Gadgets for All Users

In this chapter

These gadgets are available for all Tempo users. To see data for other users, you must have View All Worklogs permission for your team's projects.

Worklog Distribution Gadget
Offers a variety of parameters to display worklog distribution in a column, pie or donut chart.

User Timesheet Progress
Display the progress of a user's logged hours within a current period to monitor planned and worked time.

People in Version
Monitor the status of planned and worked time for each user in a selected version.

User Timesheet
Monitor logged time by issues for each user during a designated period.

User Timesheet Charts
Display a user's logged hours within a current period viewable in area chart, bar chart, pie chart or table format.

User Timesheet Charts

In this chapter

This is a child page of Tempo Gadgets, explaining the **User Timesheet Charts** gadget. This gadget displays the current user's logged hours within the current period.

The **User Name** is an active link to the User timesheet.

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The table below lists the configuration options, for each field or drop-down list in the gadget.

Default Configuration for the User Timesheet Charts gadget

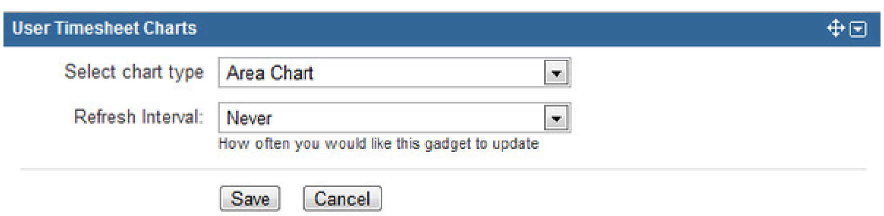


Table: Configuration options for each entry or field

Configuration Entry	Available Options
Select chart type	Available charts are *Area Chart*, *Column Chart* , *Pie Chart with Numbers* or *Pie Chart with Percentages*.

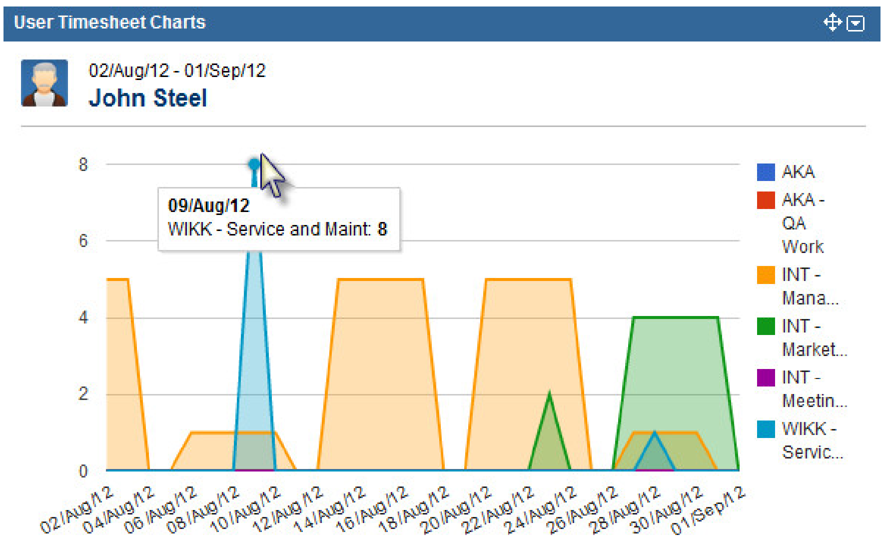
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Ever y 30 Minutes*, *Every 1 hour* or *Every 2 hours*. The value says how often you would like the gadget to update the list of associated issues.

When all the configuration options have been set, click the **Save** button to display the results in a graph - see screenshots below.

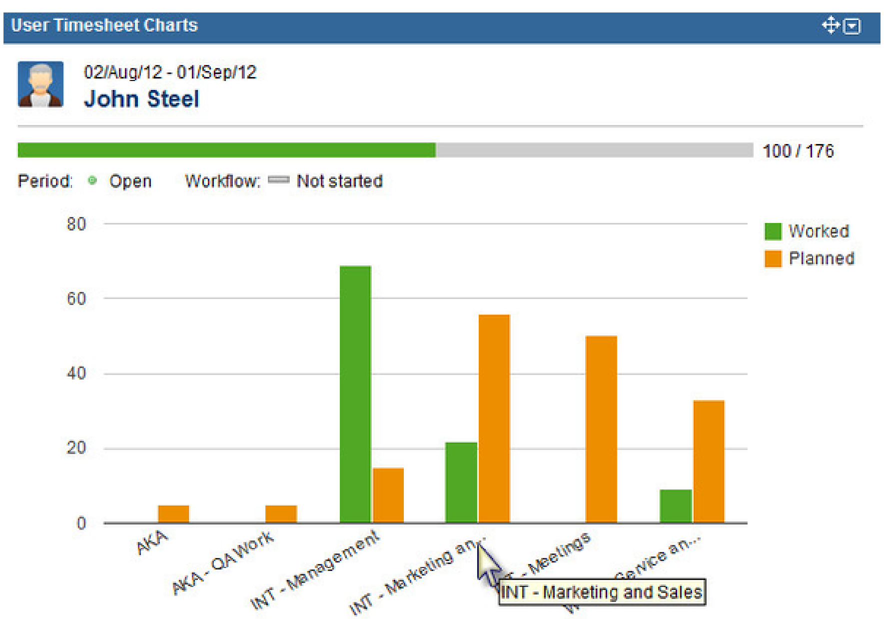
Gadget display

Examples of data displayed in this gadget are given below. Hover over the items on the charts to see more detail.

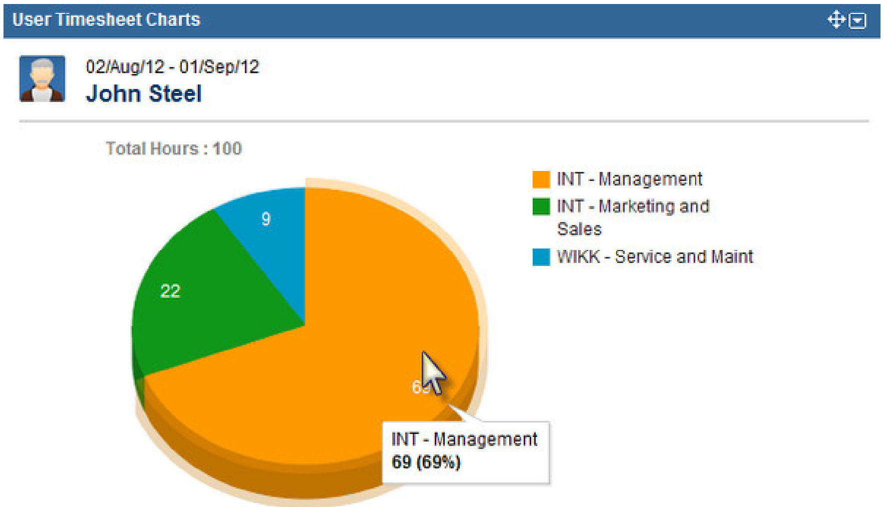
Area Chart for John Steel



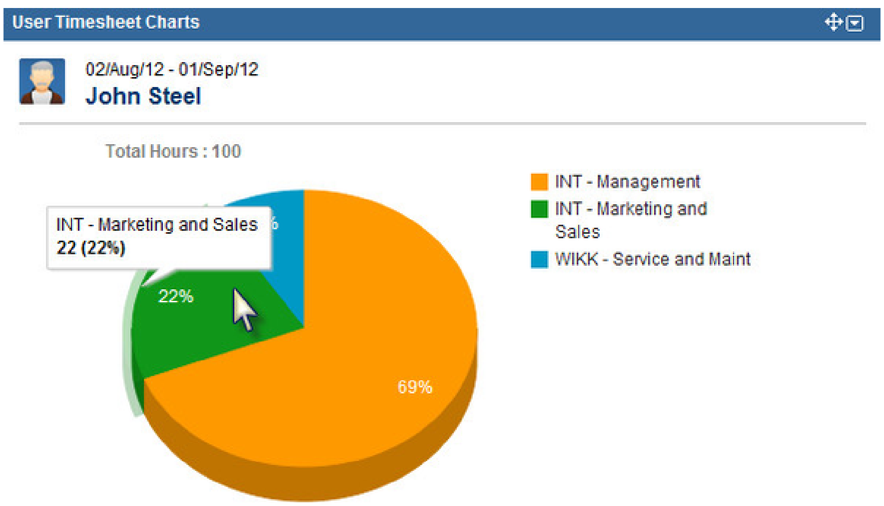
Column Chart for John Steel



Pie Chart with Numbers for John Steel

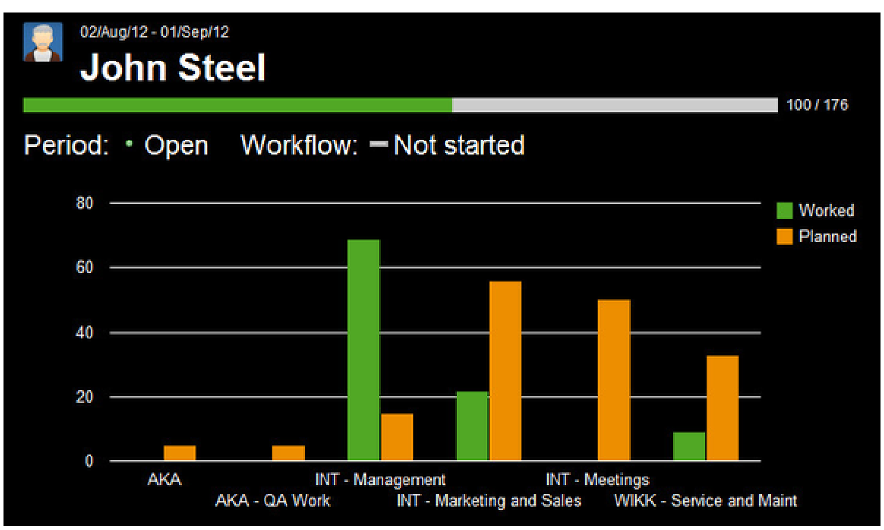


Pie Chart with Percentages for John Steel



The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard



User Timesheet Gadget

This is a child page of Tempo Gadgets, explaining the **User Timesheet** gadget. This gadget displays a User timesheet for a selected period.

In this chapter

> **Note:** The images used in Tempo gadgets are generated by using the **Chart API** from **Google**. This means that in order for the Tempo gadgets to work, your computer needs to be **online**.

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The table below lists the configuration options, for each field or drop-down list in the gadget.

Default Configuration for the User Timesheet gadget

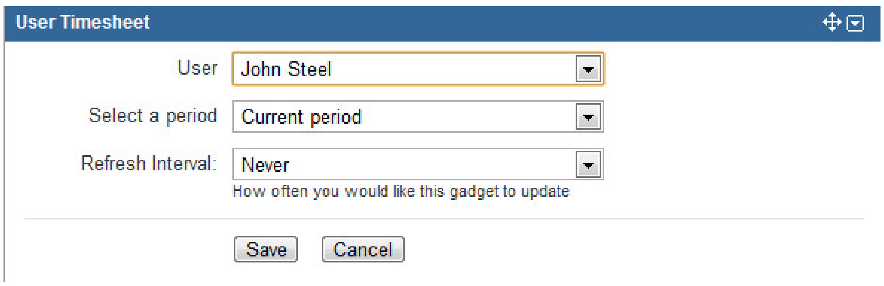


Table: Configuration options for each entry or field

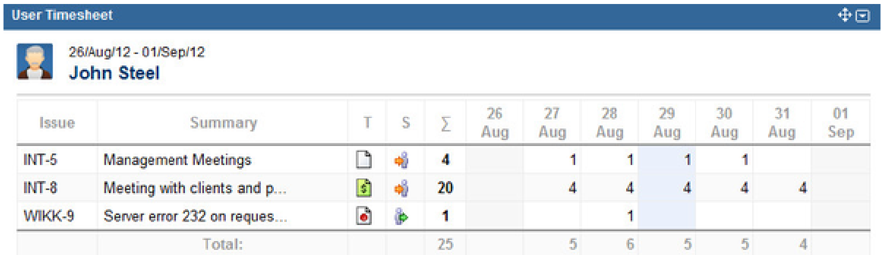
Configuration Entry	Available Options
User	Use the *Current User* option or if you have the Approve Timesheet permission (most often the Lead of the team), you can select one of your team members. The Current User option can be used, if sharing the dashboard with this gadget on.
Select a period	Available periods are *Current period*, *Previous period*, *Week* or *Two weeks*.
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Every 30 Minutes*, *Every 1 hour* or *Every 2 hours*. The value says how often you would like the gadget to update the list of associated issues.

When all the configuration options have been set, click the **Save** button to display the results in a graph - see screenshots below.

Gadget display

Examples of data displayed in this gadget are given below.

The User Timesheet for John Steel

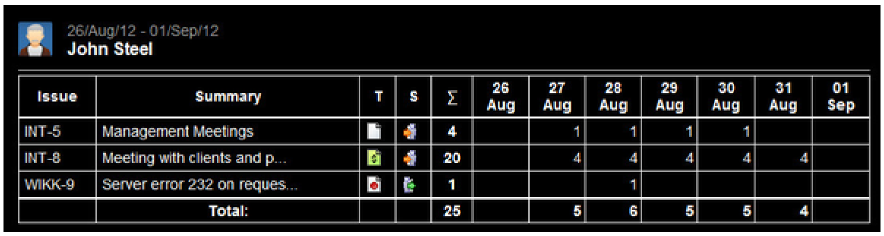


Issue	Summary	T	S	∑	26 Aug	27 Aug	28 Aug	29 Aug	30 Aug	31 Aug	01 Sep
INT-5	Management Meetings			4		1	1	1	1		
INT-8	Meeting with clients and p...			20		4	4	4	4	4	
WIKK-9	Server error 232 on reques...			1			1				
	Total:			25		5	6	5	5	4	

The **User Name** is an active link to the User timesheet for the selected user. The **Issue** and **Summary** are both active links to the Issue View in JIRA.

The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard



Issue	Summary	T	S	∑	26 Aug	27 Aug	28 Aug	29 Aug	30 Aug	31 Aug	01 Sep
INT-5	Management Meetings			4		1	1	1	1		
INT-8	Meeting with clients and p...			20		4	4	4	4	4	
WIKK-9	Server error 232 on reques...			1			1				
	Total:			25		5	6	5	5	4	

User Timesheet Progress

This is a child page of Tempo Gadgets, explaining the **User Timesheet Progress** gadget. This gadget displays the progress of logged hours for the current user on the current period.

The data is grouped by **Activity:** JIRA Project, Version or Component.

Configuration

Use a Dashboards' **Add Gadget** button to add this gadget, but it is both explained on the parent page and in the JIRA documentation. The table below lists the configuration options, for the drop-down list in the gadget.

Default Configuration for the User Timesheet Progress gadget

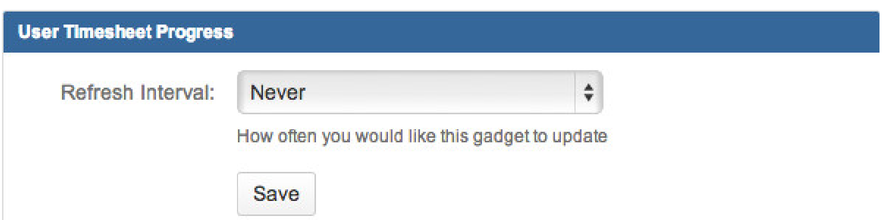


Table: Configuration options

Configuration Entry	Available Options
Refresh Interval	The values are *Never*, *Every 15 Minutes*, *Every 30 Minutes*, *Every 1 hour* or *Every 2 hours*. The value says how often you would like the gadget to update the list of associated issues.

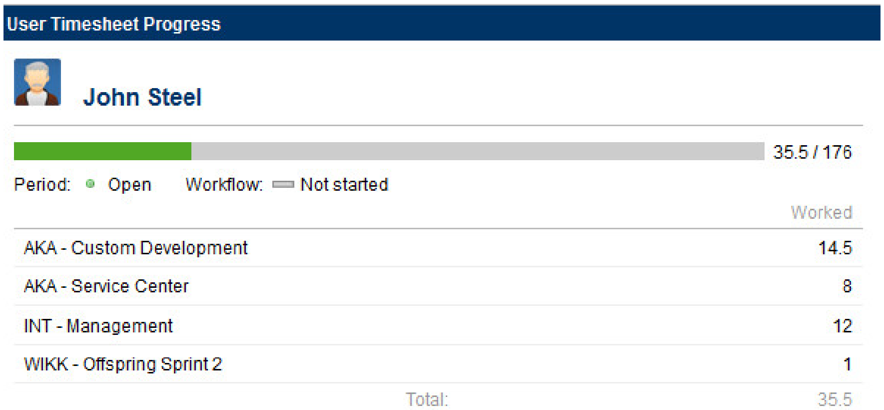
When the configuration has been set, click the **Save** button to display the results - see screenshots below.

Gadget display

Examples of data displayed in this gadget are given below.

In this chapter

The current User Timesheet Progress



User Timesheet Progress

John Steel

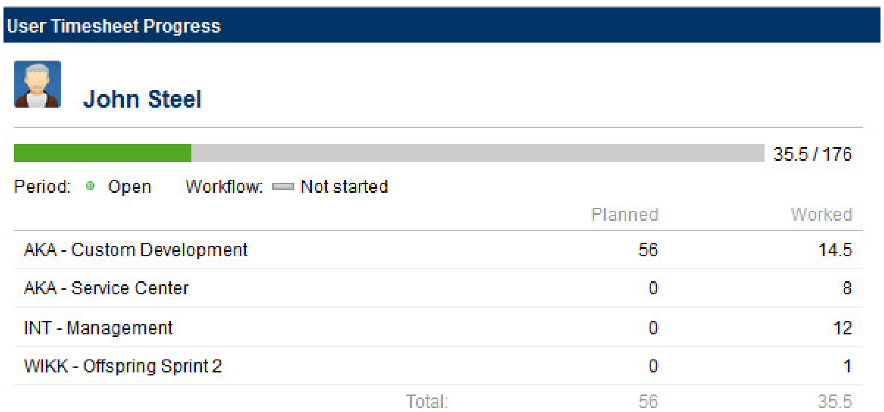
35.5 / 176

Period: Open Workflow: Not started

	Worked
AKA - Custom Development	14.5
AKA - Service Center	8
INT - Management	12
WIKK - Offspring Sprint 2	1
Total:	35.5

The planned hours are also displayed 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.**'

The current User Timesheet Progress with Planned hours



User Timesheet Progress

John Steel

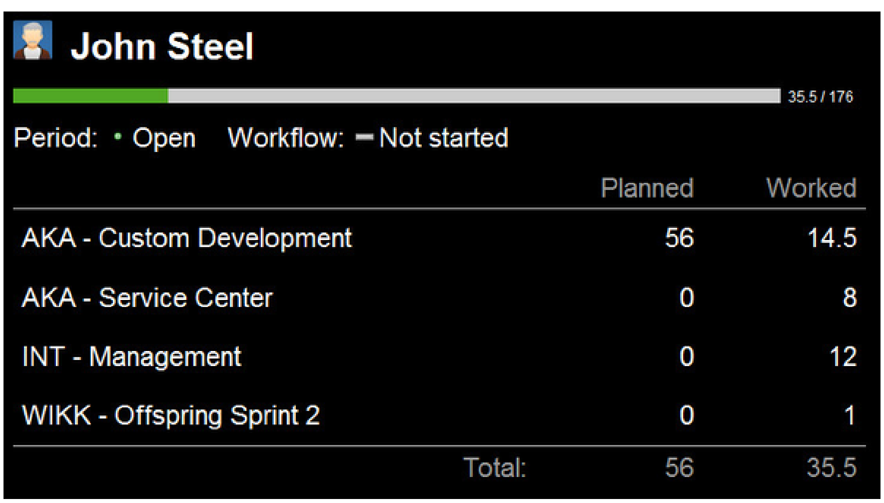
35.5 / 176

Period: Open Workflow: Not started

	Planned	Worked
AKA - Custom Development	56	14.5
AKA - Service Center	0	8
INT - Management	0	12
WIKK - Offspring Sprint 2	0	1
Total:	56	35.5

The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard



John Steel

35.5 / 176

Period: Open Workflow: Not started

	Planned	Worked
AKA - Custom Development	56	14.5
AKA - Service Center	0	8
INT - Management	0	12
WIKK - Offspring Sprint 2	0	1
Total:	56	35.5

Worklog Distribution Gadget

This page explains the Worklog Distribution Gadget. It is as the name indicates, good to analyse or get an overview for worklog distribution.

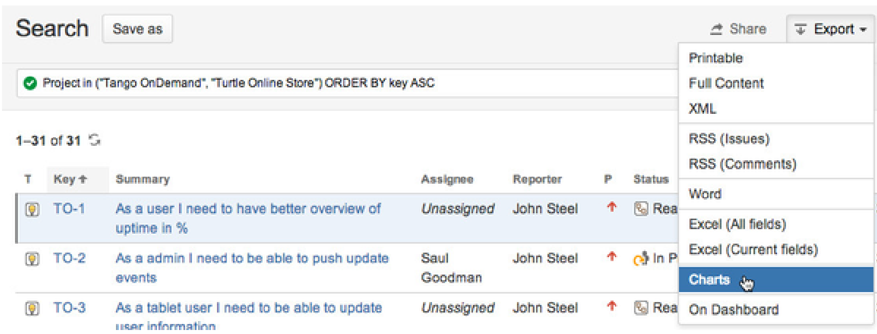
In this chapter

> To view other users' contributions to the gadget results, you must have View All Worklogs permission for the JIRA Projects in the filter that is used.

Add Gadget to Dashboard

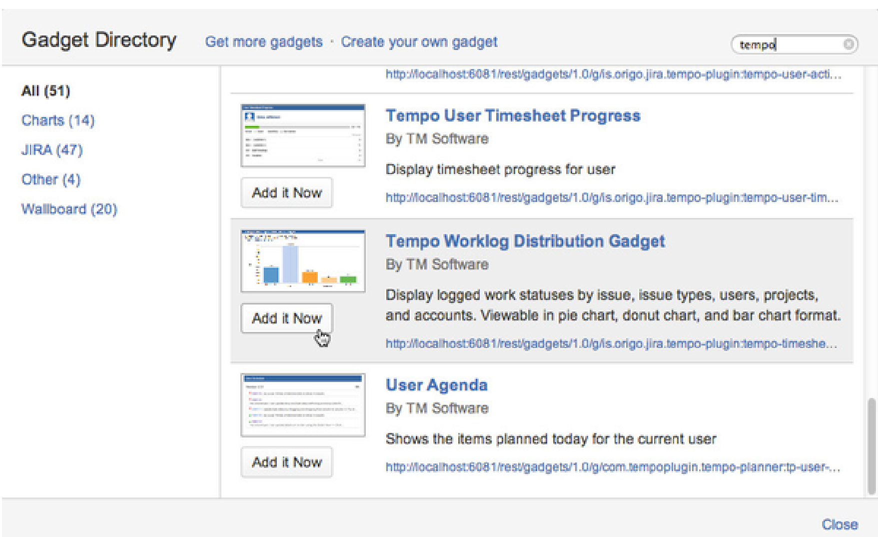
This gadget can be added in a few different ways to a dashboard. The **Add Gadget** button is both explained on the parent page and in the JIRA documentation. The gadget can also be added from the search JIRA Issue result screen, with an existing filter and by creating one on the fly through the process.

Exporting a search result to Charts (Gadget; click to enlarge)



This opens the Gadget Directory, where you can choose the Worklog Distribution Gadget by using tempo keyword.

Adding the Tempo Worklog Distribution Gadget (click to enlarge)



Gadget Configuration

The screenshot below shows the default configuration for the Worklog Distribution Gadget, when it has just been added to a dashboard and a Filter has not been chosen. The table below lists the configuration options, for each drop-down list in the gadget.

Default Configuration for the Worklog Distribution Gadget

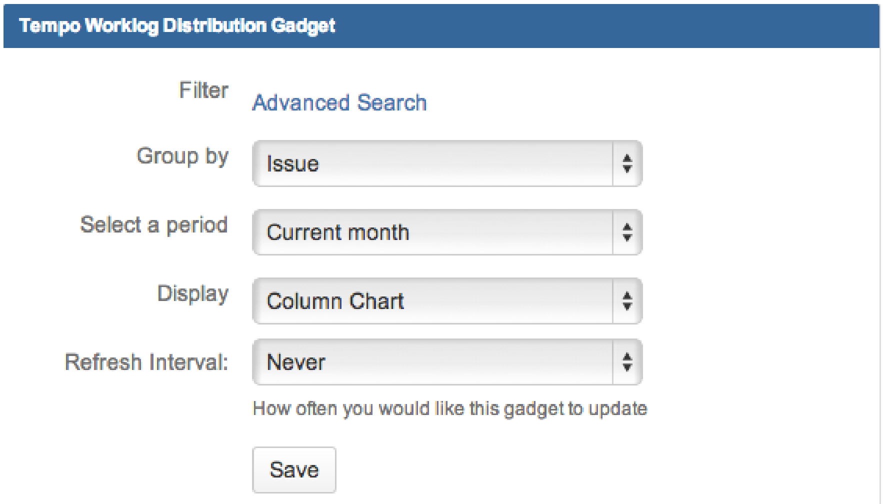


Table: Configuration options for each entry or field

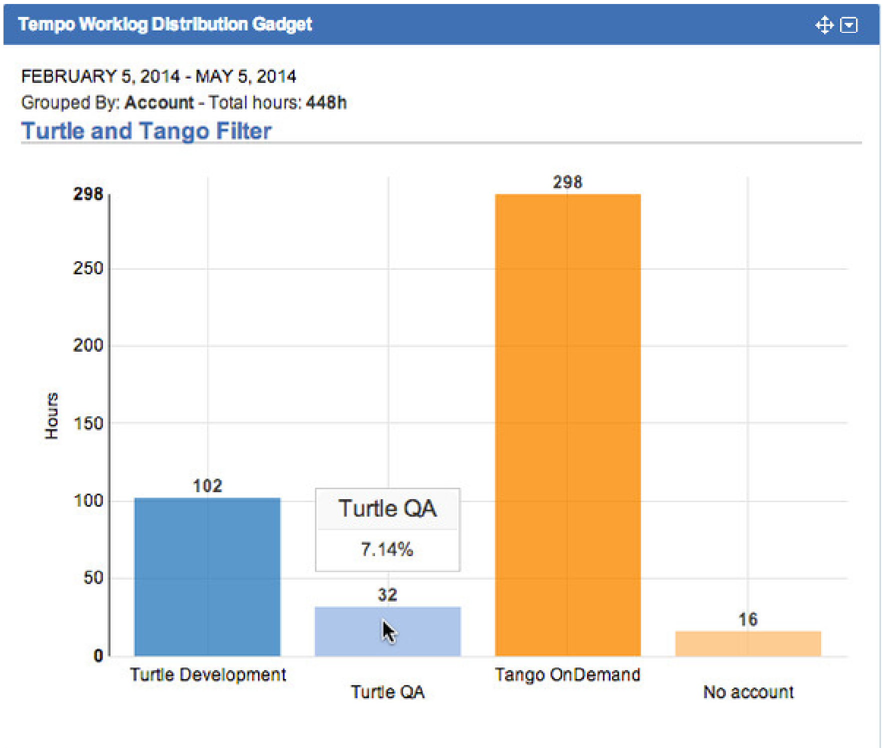
Configuration Entry	Available Options
Group by	*Issue*, *Issue Type*, *User*, *Project*, *Account*, *Epic* or *Sprint*
Select a period	*Current month*, *Last month*, *Current week*, *Last week*, *Last 30 days* or *Last 90 days*
Display	*Column*, *Pie* or *Donut Chart*
Refresh Interval	*Never*, *Every 15 Minutes*, *Every 30 Minutes*, *Every 1 Hour* or *Every 2 Hours*

When all the configuration options have been set, click the **Save** button to display the results in a **Column**, **Pie** or **Donut Chart** - see screenshots below.

Gadget Display

Several examples are given below, all with Group by Account, the period as the Last 90 days and displayed as one of the three charts available.

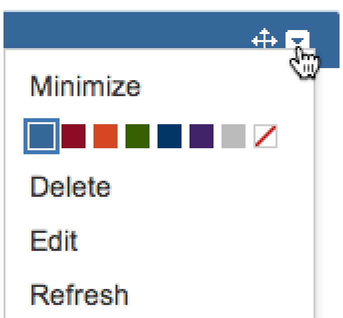
Configured as Group by Account, Last 90 days and displayed as Column Chart



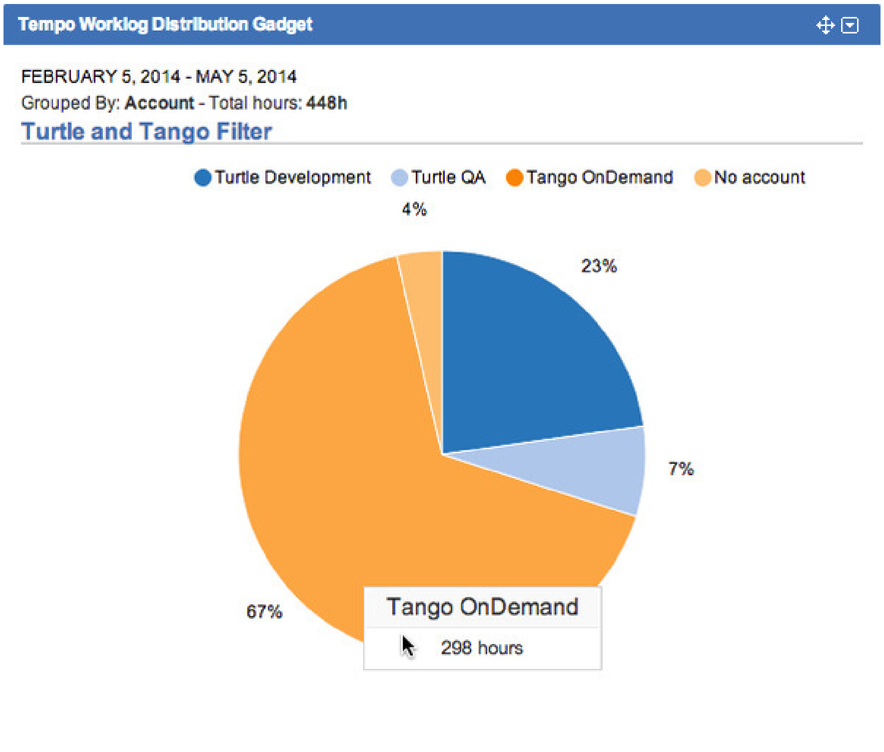
The filter name is an active link, which opens the Advanced Timesheet for the filter displayed.

To edit any of the configuration options, open the gadget menu in the top right corner and click the **Edit** option. This opens the configuration screen as above, where the options can be edited as needed and then saved for a new display.

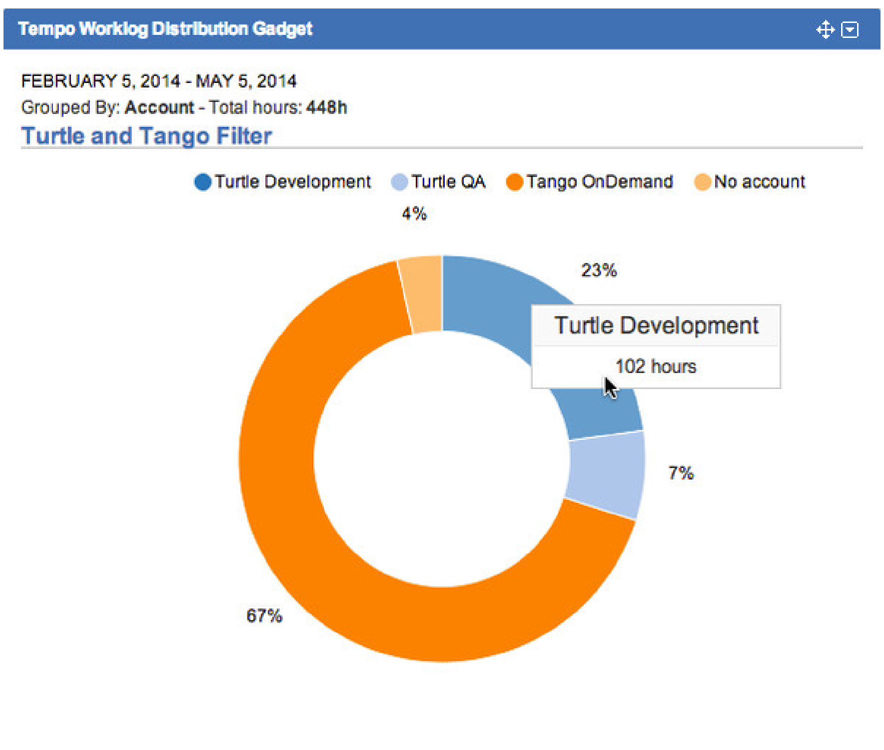
Edit option in the gadget menu



Same data as above, but in a Pie Chart

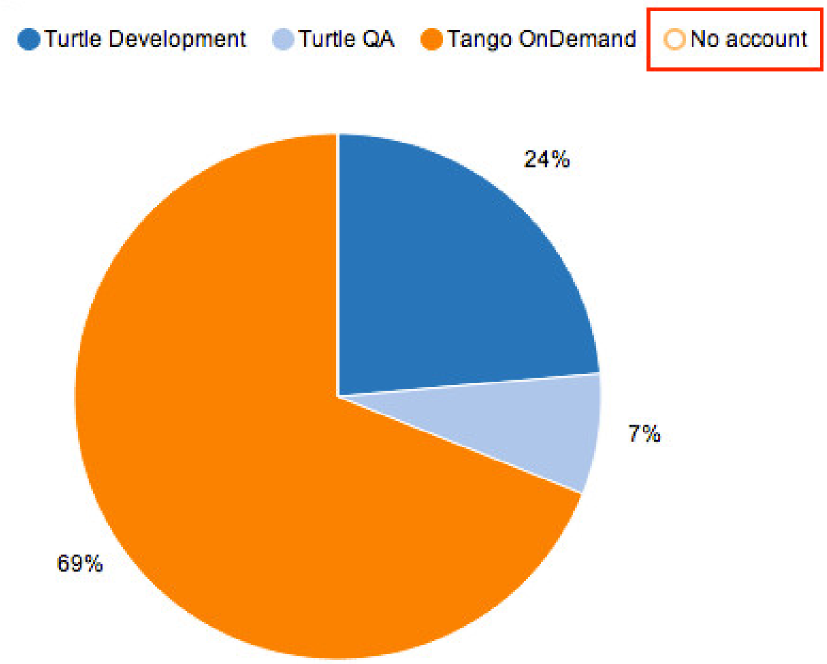


Same data as above, but now in a Donut Chart



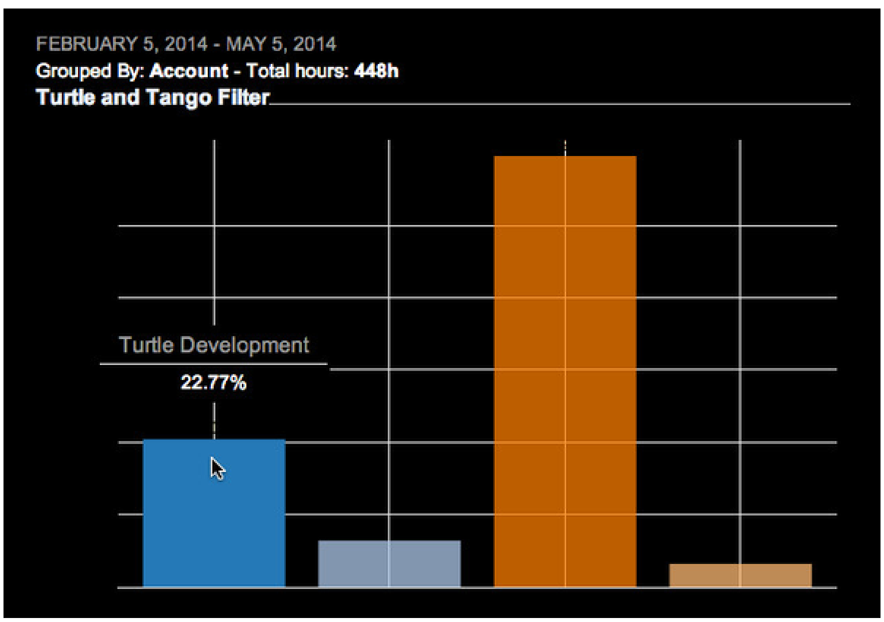
Values can be knocked out, both for the Pie and Donut Chart. To knock a value out, click on it's coloured circle and it is no longer included in the displayed image. To include it again, simply click on the dot again. The percentage displayed for each value, is always based on the total number of values included.

Pie Chart with the 'No account' option not displayed



The gadget can also be displayed on a JIRA Wallboard, given the plugin is installed.

Same data as above, but on a JIRA Wallboard

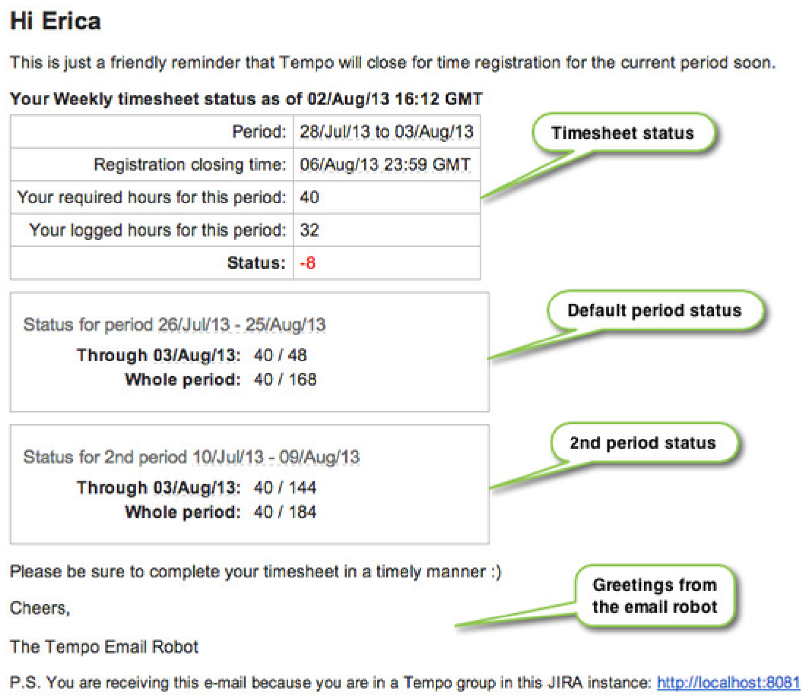


Tempo Scheduler

JIRA Administrators can use the Tempo Scheduler both to schedule *closure* and *reminders* for adding and editing worklogs within an open period. If the Scheduler is configured with Email settings, all team members will receive an email according to the configuration.

In this chapter

A sample email from the Tempo Email Robot



The table below explains the different sections of the email as in the screenshot above.

Table: Tempo Email Robot sections explained

Email Section	Description
Timesheet status	This is the timesheet status taken on the minute that the email was sent. In this example the user Erica needs to log 8 hours of work before the closure on 6th of August 2013 at 23:59 GMT
Default period status	Shows the **total logged hours** vs. **total required hours** from the first day of the period until the schedulers closing day. The next line shows similar information for the whole period.
2nd period status	Similar information as for the default period above, given the 2nd period has been configured.
Greetings from the email robot	Greetings from the Tempo Email Robot and the reason for the email being sent.

Grace Period

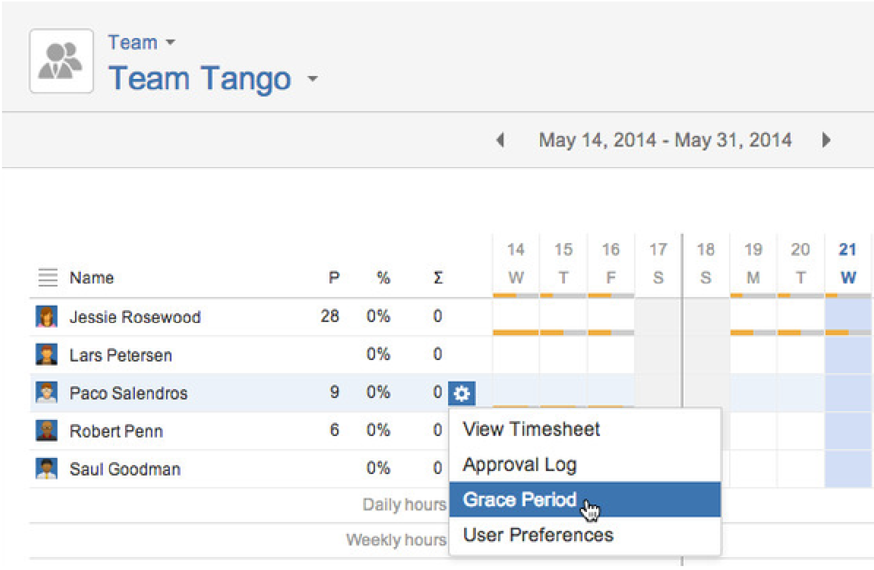
When the scheduler closes a period or part of a period, users are blocked from adding or editing their own worklogs that are on the closed days. However, a user who has Approve Timesheet permission for the team and 'Log Work for Others' permission for the team's projects is still able to edit the worklogs of all team members. For users to be able to add and edit their own worklogs after the closing date, they must ask a user with Approve Timesheet permission in the team to grant them a short **Grace Period**, during which access is granted again.

To grant users a **Grace Period** of any length, a user with Approve Timesheet permission for the team can do so from the **Actions** list in the Team Timesheet and Project Timesheet.

The Grace Period feature is part of the Tempo activity stream provider, which means the activity will be shown on a Dashboard, if the gadget has been added.

Granting a Grace Period in the Team Timesheet for Paco Salendros

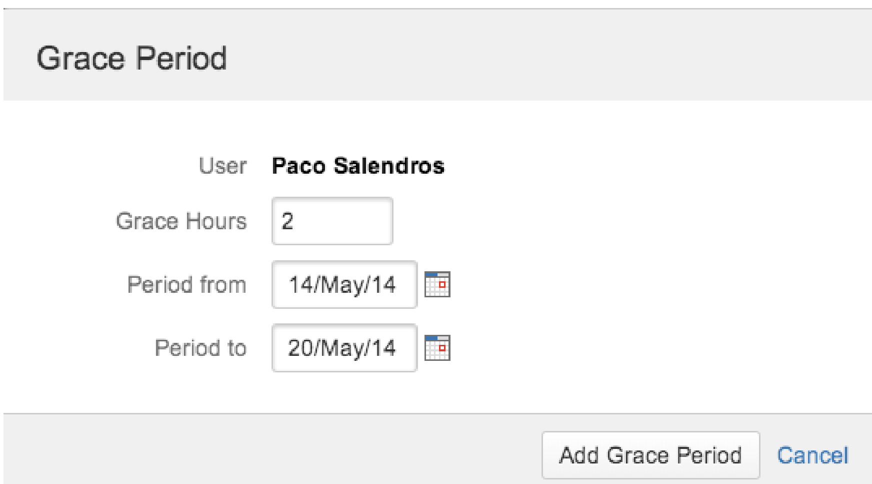
In this chapter



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 period.
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



The window above shows that Paco Salendros will be granted 2 hours to complete his timesheet (add or edit worklogs), for the Grace Period 14/May/14 - 20/May/14.

Keyboard Shortcuts

This page lists the shortcuts available in Tempo Timesheets.

Table: Tempo Timesheets shortcut list

Function	Mac	PC
Open a Log Work window in either in a timesheet and JIRA Issue view.	**w**	**w**
Go to the next screen in a Project Timesheet.	**j**	**j**

Go to the previous screen in a Project Timesheet	**k**	**k**
Go to Tempo Timesheets fro m any JIRA screen.	**g** then **t**	**g** then **t**

Tempo JQL Functions

This page explains JQL functions for Tempo Timesheets, which make it possible to include Tempo data in the JIRA advanced search.

The functions can accept one or more argument(s)/value(s), given the accept an argument or a value.

On this page

internalIssues

This function returns all internal issues, that the user has JIRA permissions to browse.

It doesn't take any arguments, simply returns all issues that fall under the category of being internal.

```
issuekey in internalIssues()
```

team

The *team* function allows you to search for team members, that are for example either the JIRA issue assignee or reporter.

It takes the team name as argument.

```
assignee in team("Team Tango")
reporter in team("Team Wikkieea")
```

tempoEpicIssues

Finally the function *tempoEpicIssues*, makes it possible to search for issues that are of type Epic and return all stories that are assigned to the Epic.

It takes the issue key of the Epic as an argument and returns all of it's stories and sub-tasks.

```
issue in tempoEpicIssues("WIKK-19","WDP-1")
```

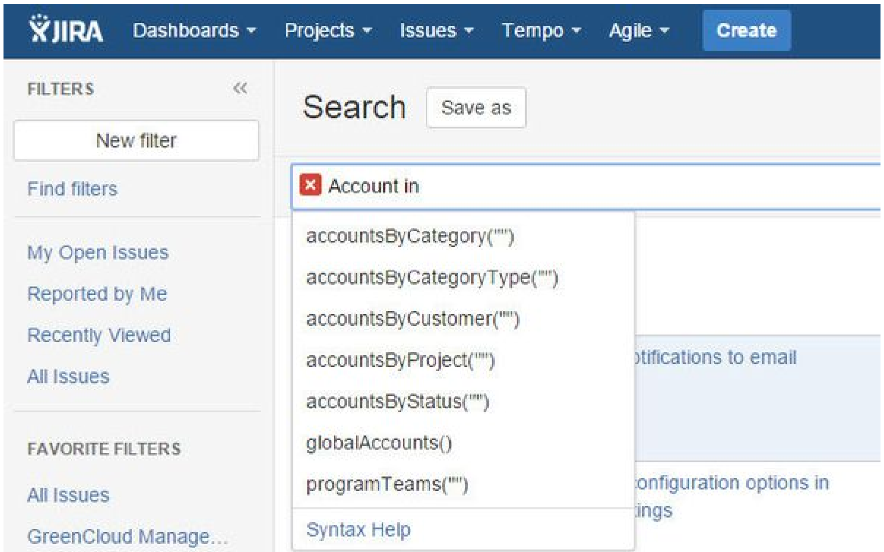
Searching for accounts

For information about Tempo JQL functions for searching for accounts in a JIRA advanced search, see Searching for accounts.

Searching for accounts

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

This page explains JQL functions for accounts, which make it possible to include Tempo data in the JIRA advanced search.



These functions are also available in the basic search.

The accounts JQL functions are based on the Accounts Custom Field name or **Account** and return data used on the JIRA issue level.

This means that even if the custom field has been added as a worklog attribute through Tempo Timesheets, the data extracted is still from the issue level.

Account = "Key"

This returns all JIRA issues that have been set to the account that matches the key used.

```
Account = "201409"
```

accountsByCustomer

The accountsByCustomer() returns all JIRA issues set to accounts for a specific customer. With this function you can find all open issues for a specific customer or create a custom filter based on several customers that can be used to generate custom reports.

The value input(s) to the function, is the configured *key* or *name* (not case sensitive) for the custom er. Insert one or many, separated by a comma ",".

```
Account IN accountsByCustomer("Parliament of
Utopia")
```

accountsByCategory

Likewise the accountsByCategory(), enables you to group JIRA issues on account categories, that exist for your accounts. Examples are: *Development*, *Internal Cost* or *Billable*.

The value input(s) to the function, is the configured *key* or *name* (not case sensitive) for the categor y. Insert one or many, separated by a comma ",".

```
Account in accountsByCategory("BILLABLE")
```

On this page

Related pages

- Accounts Custom Field
- Creating an account
- Configuring an account
- Import Custom CSV
- Blog on Accounts JQL Functions

EXAMPLE

Account in accountsByCategory("")* - Returns all issues that have an Account in customfield that has an assigned Category

accountsByCategoryType

The accountsByCategoryType(), enables you to group JIRA issues on account category types. The account category types are: *Billable, Capitalize, Internal* and *Operational*.

The value input(s) to the function, is the *name* (not case sensitive) for the category type. Insert one or many, separated by a comma ",".

```
Account in accountsByCategoryType("INTERNAL")
```

EXAMPLES

Account in accountsByCategoryType(Capitalized) - Returns all issues with Accounts belonging to the Category Type "Capitalized"

Account in accountsByCategoryType("")* - Returns all issues that have an Account in customfield that has an assigned Category with a Category Type

accountsByProject

For accounts that have many linked projects, it is useful to get all issues set to accounts for specific projects. This is possible with the accountsByProject() function. The value input(s) to the function, is the JIRA project *key*.

```
Account IN accountsByProject("CLOUD", "WIKK",
"WDP")
```

accountsByStatus

AVAILABLE FROM ACCOUNTS 1.7

The accountsByStatus(), enables you to group JIRA issues on account status. Account can have one of three statuses: *Open, Closed* and *Archived.*

The value input(s) to the function, is the *name* (not case sensitive) for the status. Insert one or many, separated by a comma ",".

```
Account IN accountsByStatus("OPEN", "CLOSED",
"ARCHIVED")
```

globalAccounts

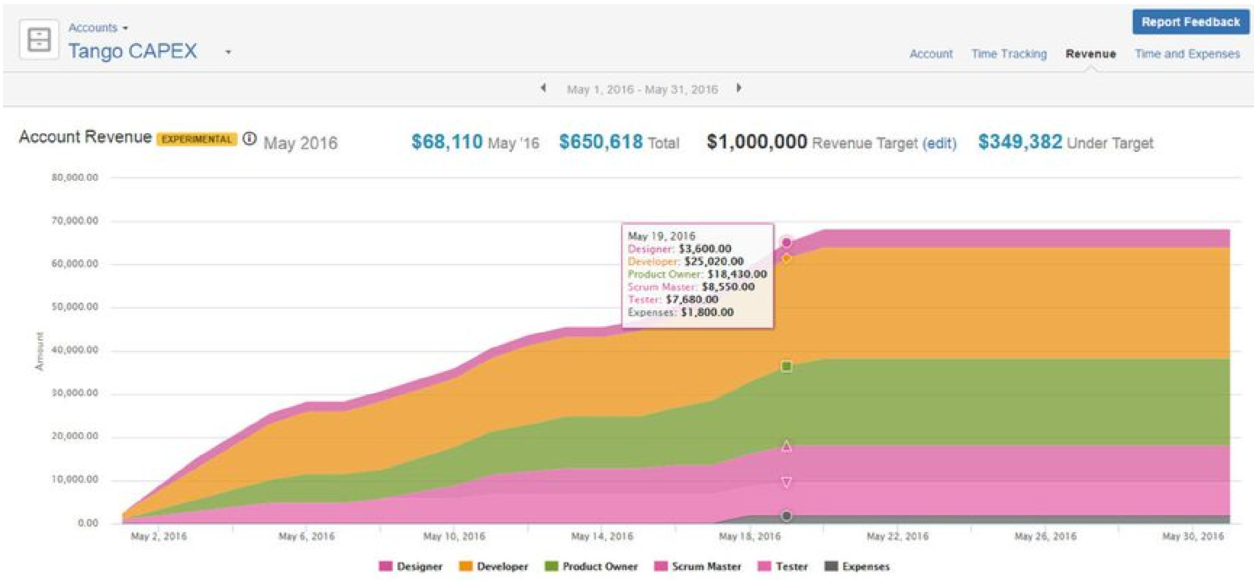
The last JQL function for accounts, is for the global accounts. Global accounts, are accounts that are not related to specific projects and can be associated with any issue in JIRA. This function returns a list of issues set to global account(s).

```
Account IN globalAccounts()
```

Managing revenue and billing

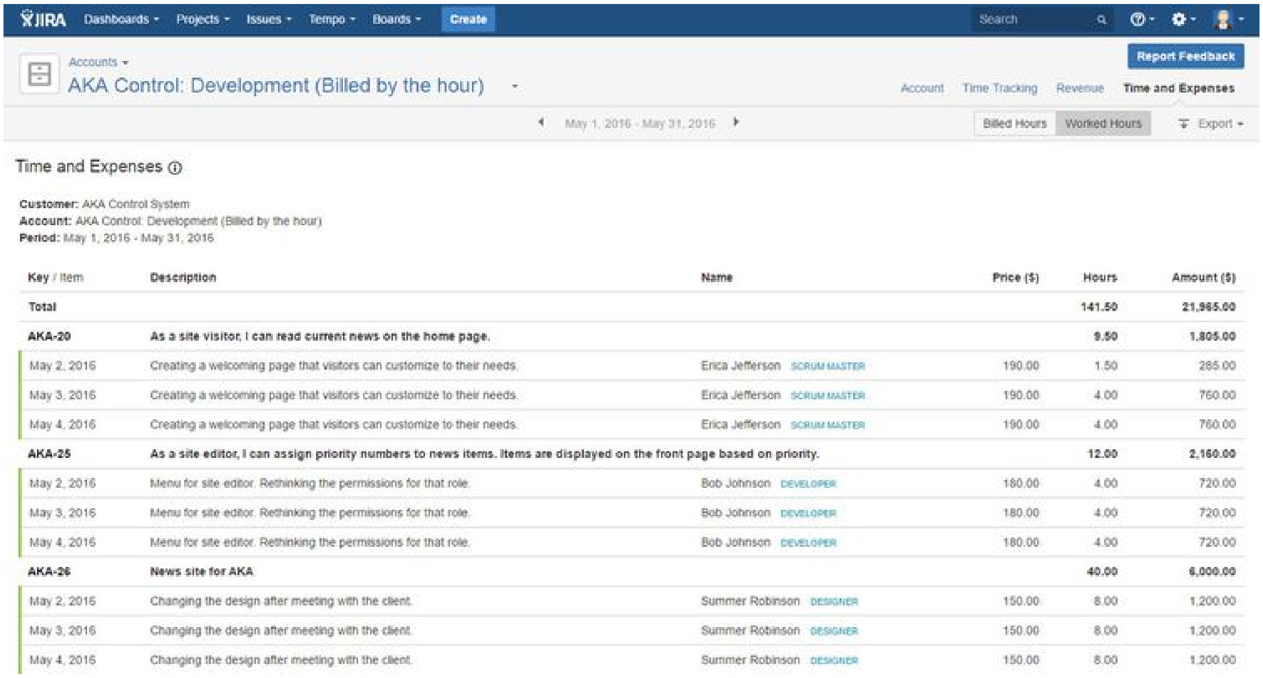
You can manage work for customers and accounts with Tempo Timesheets. For example, you can do the following tasks:

- Get an overview of the calculated revenue that your company makes, based on the hours that team members in different roles work on each account.



- Set a revenue target for each account and monitor how close the calculated revenue is to the target.
- View a graph of logged hours by account type (billable, capitalized, internal, operational).

- Add expenses to JIRA issues, and view a Time and Expenses report.



In this chapter

Related pages

- Configuring and managing accounts
- Tempo accounts navigator
- Tempo team navigator
- Browsing a team
- Tempo accounts gadgets

Viewing accounts and teams

A Tempo account might represent, for example, a customer project, a cost center, or a contract. On the Accounts page, you can view a list of all accounts that you have access to.

A Tempo 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. On the Teams page, you can view a list of all teams that you have access to.

Accessing the Accounts page

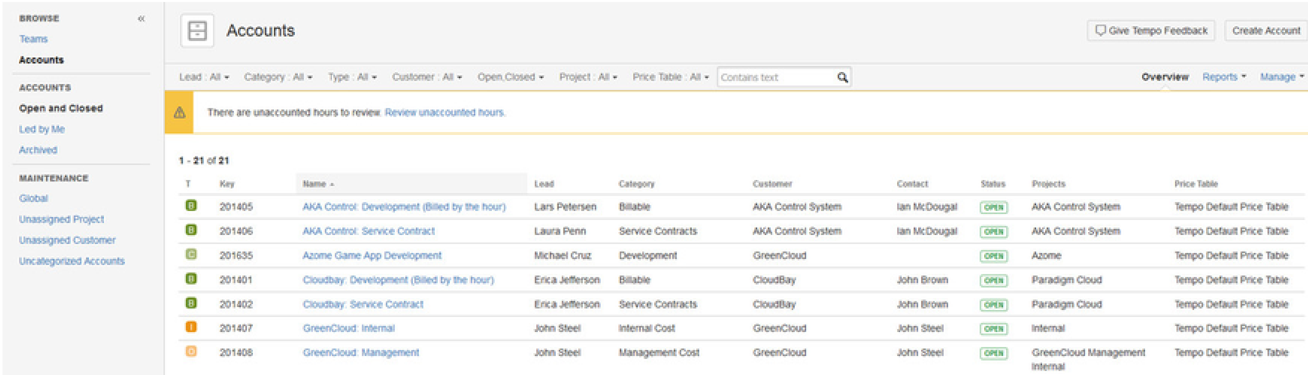
Required permission

All users can access the Accounts page. However, the page lists only accounts that are linked to projects for which you have Browse Projects permission in JIRA.

Procedure

On the main menu bar, click **Tempo** > ACCOUNTS **more**.

Accounts page (click to enlarge)



Accessing the Teams page

Required permission

All users can access the Teams page. However, the page lists only teams for which you have Browse Team permission in Tempo.

Procedure

On the main menu bar, click **Tempo** > TEAMS **more**.

Related topics

- Configuring and managing accounts
- Configuring and managing teams

Viewing account revenue and target

You can view an account revenue report, which consists of a table and graph that show the calculated account revenue for a month. You can set the total revenue target for the account, independent of time period, and monitor how much more revenue must be earned to reach the target.

On this page

Tutorial

Revenue reporting

Viewing the account revenue report

Required permission

One of the following permission types:

- Account Lead
- Tempo Account Administrators
- Tempo Rate Administrators
- Browse Customer Revenue

Procedure

To view the revenue report for an account, complete the following steps:

1. On the top menu bar, click **Tempo** > ACCOUNTS **more**.
2. On the Accounts page, select the account.
3. On the individual account page, in the upper-right corner, click **Revenue**.

Automatic calculation of revenue

Account revenue is automatically calculated based on the following parameters:

- The number of hours that are logged by team members on issues.
- The role of the team members.
- The price rates that correspond to the roles.
- The expenses that are logged by team members on issues.

The issues must be in projects that are linked to the account.

Overview of the account revenue table

The account revenue table is below the graph on the Account Revenue page and lists revenue by team role, issue type, and expense category.

(Click to enlarge image.)

Designer Developer Product Owner Scrum Master Tester Expenses

Team Role / Issue Types	Rate ($)	Hours	Amount ($)
Team Role Team Role / Issue Types	-	386.00	68,110.00
Designer	150.00	28.00	4,200.00
Story	150.00	28.00	4,200.00
Developer	180.00	143.00	25,740.00
Bug	180.00	2.00	360.00
Story	180.00	141.00	25,380.00
Product Owner	190.00	106.00	20,140.00
Internal Task	190.00	53.00	10,070.00
Story	190.00	53.00	10,070.00
Scrum Master	190.00	45.00	8,550.00
Internal Task	190.00	25.00	4,750.00
Story	190.00	20.00	3,800.00
Tester	120.00	64.00	7,680.00
Story	120.00	64.00	7,680.00
Expenses	-	-	1,800.00
Travel	-	-	1,800.00

The four columns have the following meanings:

Column	Team Role	Rate ($/hour)	Hours	Amount ($)
Explanation	The team role of users who logged work. Logged expenses are included at the bottom of the table.	The hourly price rate that corresponds to the team role. The price rates are defined for each role in a price table that is associated with the account.	The number of logged hours	**For logged hours** The calculated revenue, which is the rate multiplied by the number of logged hours **For expenses** The amount of the expense
Tip		A user who is in two teams might have different roles in each team and therefore two hourly rates. By default, work on an issue is charged at the user's highest rate. You can set work to be charged at the user's rate for a particular team by selecting that team in the **Team** field of the issue.		

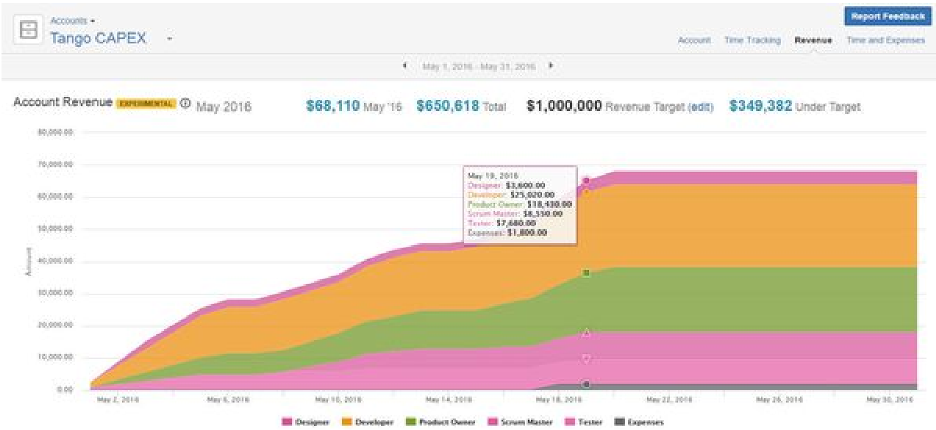
Displaying revenue by issue type and expense category

In the account revenue table, to display a breakdown of revenue by issue type and by expense category, complete the following steps:

1. In the first column, click the header, **Team Role**.
2. Select **Team Role / Issue Types** from the displayed list.

Overview of the account revenue graph

The account revenue graph displays revenue for different roles in different colors for one month.



The example above shows calculated revenue for an account that is called 'Tango CAPEX' for the month of May 2016. Above the graph, the four figures have the following meanings:

Figure	**$68,110** May '16	**$650,618** Total	**$1,000,000** Revenue Target	**$349,382** Under Target
Explanation	The revenue for the displayed month.	The accumulated revenue from the date that the account was created until the end of the displayed month.	The revenue target for the account, independent of time period.	The difference between the previous two figures. This figure turns green if the revenue is over target.

Changing the revenue target

Required permission

One on the following permission types:

- Tempo Account Administrators
- Tempo Rate Administrators

Procedure

To change the revenue target for the account, complete the following steps:

1. Above the graph, beside **Revenue Target**, click **edit**.
2. Type the value of the new target.
3. Click the check mark .

Related topics

- Setting price rates
- Adding expenses to JIRA issues

Viewing logged time by account type

For each team, you can view a *team utilization report*, which consists of a bar chart and table that show the number of logged hours by account type (billable, capitalized, internal, operational).

Required permission

- Browse Team permission for the team
- One of the following roles or permission types:

Role or permission type	Included in the report
View All Worklogs permission for the team's projects	Logged hours of each team member
Team member	Your logged hours

No report is displayed for periods in which there are no logged hours to be displayed.

Tutorial

Team utilization reporting

Viewing the team utilization report

Procedure

To view the utilization report for a team, complete the following steps:

1. On the main menu bar, click **Tempo** > TEAMS **more**.
2. On the Teams page, click the name of the team.
3. On the individual team page, in the upper-right corner, click **Utilization**.

Example of a team utilization table

The team utilization table is displayed below the bar chart on the Team Utilization page.

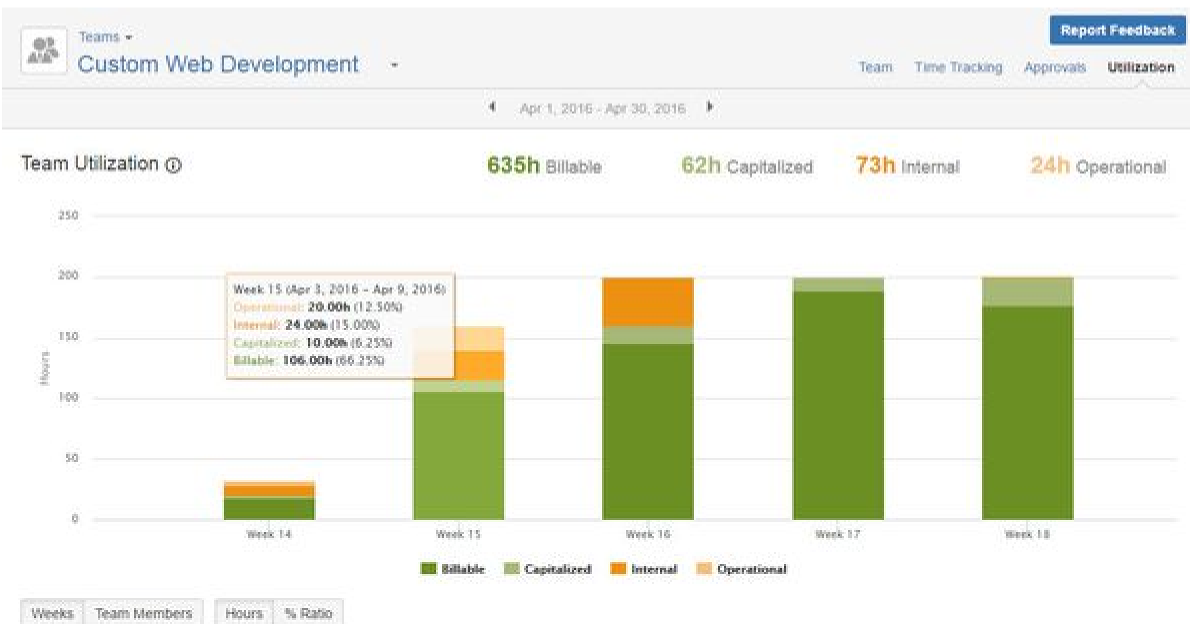
Click to enlarge

Weeks | Team Members | Hours | % Ratio

Category Type / Account	Account Category	Customer	% Ratio	Hours
Total - Mar 1, 2015 - Mar 31, 2015			100.00	676.00
Billable			**5.33**	**36.00**
GreenCloud: Management	Management Cost	GreenCloud	5.33	36.00
Capitalized			**66.72**	**451.00**
AKA Control: Development	Development	AKA Control System	5.62	38.00
Cloudbay: Development	Development	CloudBay	33.43	226.00
GreenCloud: Staff	Staff Cost	GreenCloud	4.73	32.00
Tango CAPEX	Development	GreenCloud	14.20	96.00
Wikkkieea Cloud CAPEX	Development	GreenCloud	8.73	59.00
Internal			**27.96**	**189.00**
AKA Control: Service and Maint	Service and Maint	AKA Control System	5.62	38.00
Cloudbay: Service and Maint	Service and Maint	CloudBay	5.18	35.00
GreenCloud: Internal	Internal Cost	GreenCloud	4.14	28.00
Tango OPEX	Service and Maint	GreenCloud	6.80	46.00
Wikkkieea Cloud OPEX	Service and Maint	GreenCloud	6.21	42.00

Example of a team utilization bar chart

Click to enlarge



The totals at the top of the chart are rounded for readability.

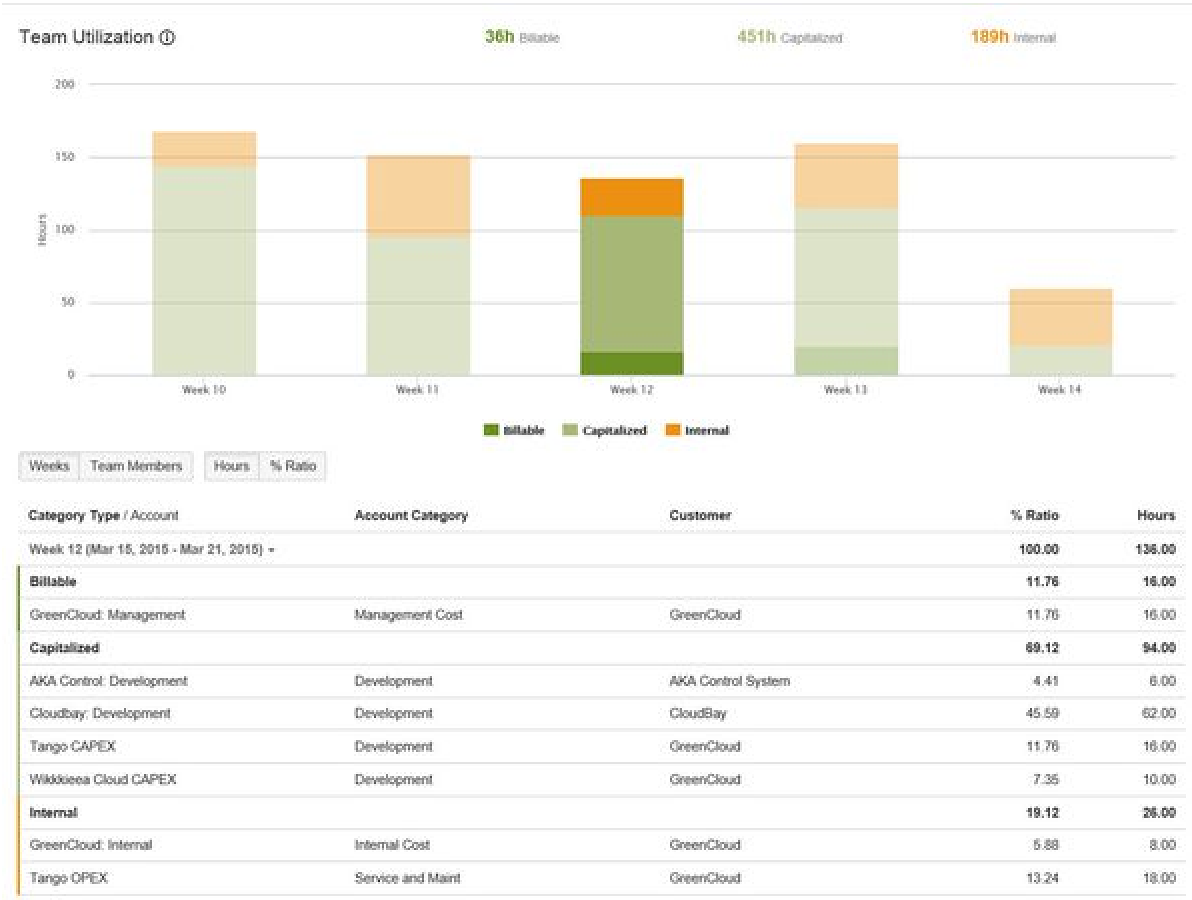
Tips

- You can switch between weeks and team members on the horizontal axis by clicking the buttons under the chart.
- You can switch between hours and percentage of time on the vertical axis by clicking the buttons under the chart.
- You can view more detailed information about each bar by hovering over the chart, as shown on the example above.

Displaying information for one bar

In the team utilization table, you can display information for a single bar of the chart by clicking the bar. You can reset the table to show all data from the chart by clicking the bar again.

Showing one week in table by clicking on bar in chart



Category Type / Account	Account Category	Customer	% Ratio	Hours
Week 12 (Mar 15, 2015 - Mar 21, 2015)			100.00	136.00
Billable			**11.76**	**16.00**
GreenCloud: Management	Management Cost	GreenCloud	11.76	16.00
Capitalized			**69.12**	**94.00**
AKA Control: Development	Development	AKA Control System	4.41	6.00
Cloudbay: Development	Development	CloudBay	45.59	62.00
Tango CAPEX	Development	GreenCloud	11.76	16.00
Wikkkieea Cloud CAPEX	Development	GreenCloud	7.35	10.00
Internal			**19.12**	**26.00**
GreenCloud: Internal	Internal Cost	GreenCloud	5.88	8.00
Tango OPEX	Service and Maint	GreenCloud	13.24	18.00

Missing data

If the account, account category, customer, or account category type is not defined for issues, logged time is displayed in gray in the chart and table. You can add the missing information by resolving unaccounted hours.

Missing data is indicated in gray

Category Type / Account	Account Category	Customer	% Ratio	Hours
Total - Mar 1, 2015 - Mar 31, 2015			100.00	848.00
Capitalized			53.54	454.00
Cloudbay: Development	Development	CloudBay	10.38	88.00
GreenCloud: Staff	Staff Cost	GreenCloud	6.72	57.00
Tango CAPEX	Development	GreenCloud	33.49	284.00
Wikkkieea Cloud CAPEX	Development	GreenCloud	2.95	25.00
Internal			0.35	3.00
Cloudbay: Service and Maint	Service and Maint	CloudBay	0.35	3.00
Operational			22.88	194.00
GreenCloud: Sales and Marketing	Sales and Marketing	GreenCloud	22.88	194.00
No Category Type			23.23	197.00
GreenCloud: Management	Management Cost	GreenCloud	22.29	189.00
No Account	No Category	No Customer	0.94	8.00

Related pages

- Categorizing accounts
- Configuring basic team information
- Resolving unaccounted hours

Viewing the time and expenses report

The time-and-expenses report shows hours and expenses that are logged to the account for any month, sorted by issue. The report includes calculated revenue, based on logged hours and on the rates that are defined in the price table that is used by the account.

On this page

Tutorial

Reporting on work performed and expenses

Viewing the time and expenses report

Required permission

One of the following permission types:

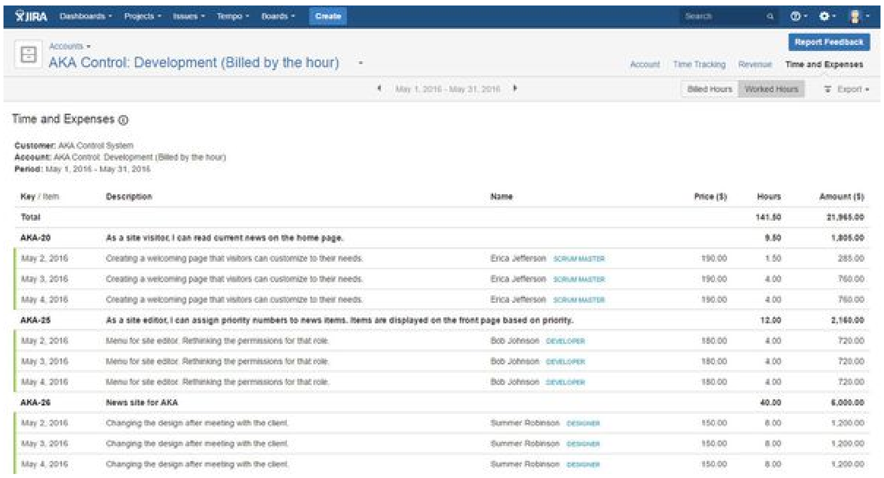
- Account Lead
- Tempo Account Administrators

Procedure

1. On the top menu bar, click **Tempo** > ACCOUNTS **more**.
2. On the Accounts page, select the account.
3. On the individual account page, in the upper-right corner, click **Time and Expenses**.

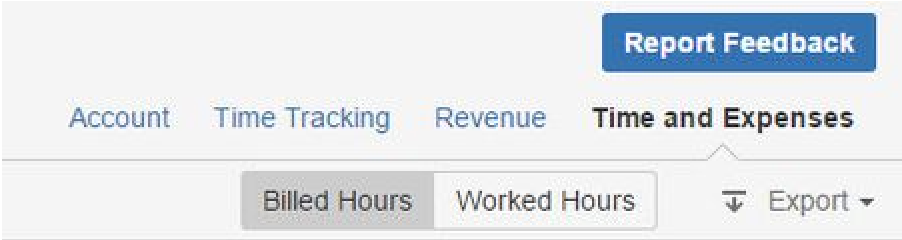
> **Users with multiple roles**
> A user who is a member of multiple teams might have different roles in each team and therefore different price rates. By default, work on an issue is charged at the user's highest rate. You can set work to be charged at the user's rate for a particular team by selecting that team in the **Team** field of the issue.

Time-and-expenses report - click to enlarge



Displaying billed or worked hours

You can configure Tempo Timesheets so that users can specify billed hours when they log work. Billed hours are hours that are billed to customers. The time-and-expenses report then displays the billed hours by default.



Price ($)	Hours	Amount ($)
	143.00	22,250.00
	11.00	2,090.00
190.00	3.00	570.00

The list of billed hours can be exported and printed. You can display all logged hours by clicking **W orked Hours**.

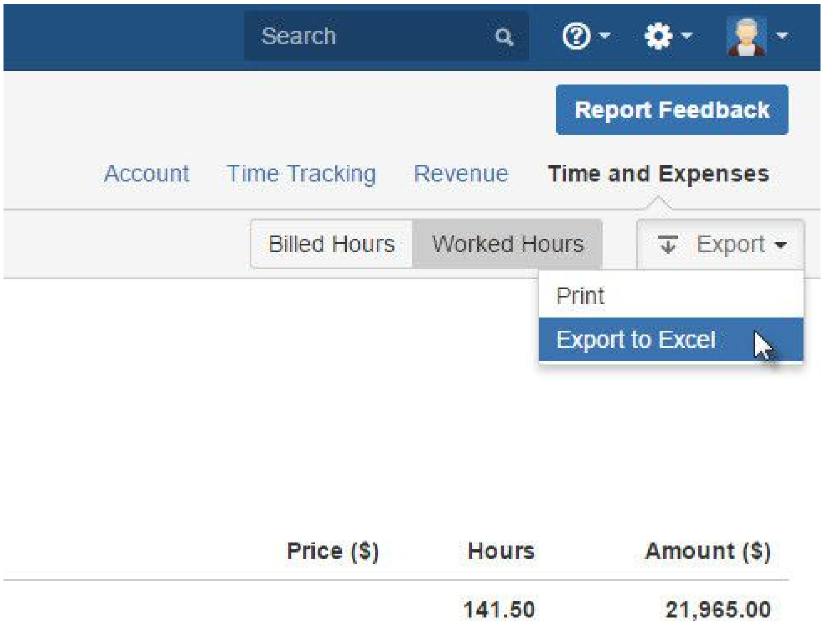
Related topic

- Setting price rates
- Configuring global accounting options

Exporting a report as a .pdf file or .xls file

You can export the time-and-expenses report as a .pdf file or a .xls file by completing the following steps:

1. In the upper-right corner of the report, click **Export**.
2. From the list, select **Print** (for a .pdf file) or **Export to Excel** (for a .xls file).



The .pdf file is a printout of the report. The .xls file contains the following sheets:

1. A Time and Expenses spreadsheet, which includes hours and expenses
2. A Time spreadsheet, which includes only logged hours
3. An Expenses spreadsheet, which includes only expenses

The Time spreadsheet contains all logged hours and the following details:

- Customer (key, name)
- Project (key, name)
- Account (key, name)
- Issue key (key)
- Issue summary (summary)
- Date (Atlassian date format, and breakdown into day, month, and year)
- Description
- Username
- Full name
- Role
- Hours
- Rate
- Amount
- Currency

The Expenses spreadsheet contains all logged expenses and the following details:

- Customer (key, name)
- Project (key, name)
- Account (key, name)
- Issue key (key)
- Issue summary (summary)
- Date (Atlassian date format, and breakdown into day, month, and year)
- Description
- Username
- Full name
- Role
- Expense category
- Amount
- Currency

Setting price rates

Required permission

Tempo Rate Administrators permission

Tutorial

Custom price tables

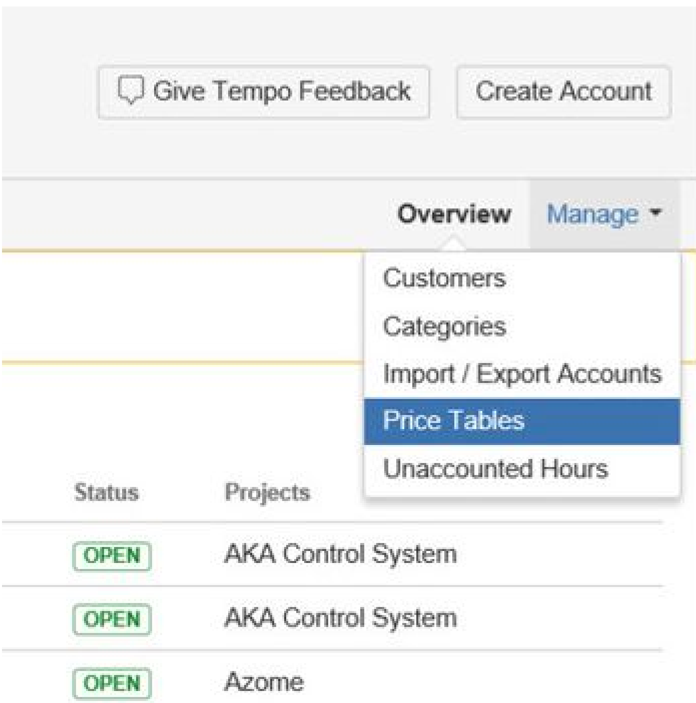
Price Tables

Price Tables are used when an account is associated with JIRA issues. The rates defined in price tables are used to calculate revenue in the account revenue report and the time-and-expenses report, for each account. The time-and-expenses report shows revenue for all hours logged. The calculations for revenue are as follows:

- Calculated Revenue for account = Sum (Logged work on JIRA issue * price rate defined for role).

To edit price rates, open the Manage menu in the top right corner of the Accounts Navigator and select Price Tables.

Selecting Price Tables option from the Manage menu

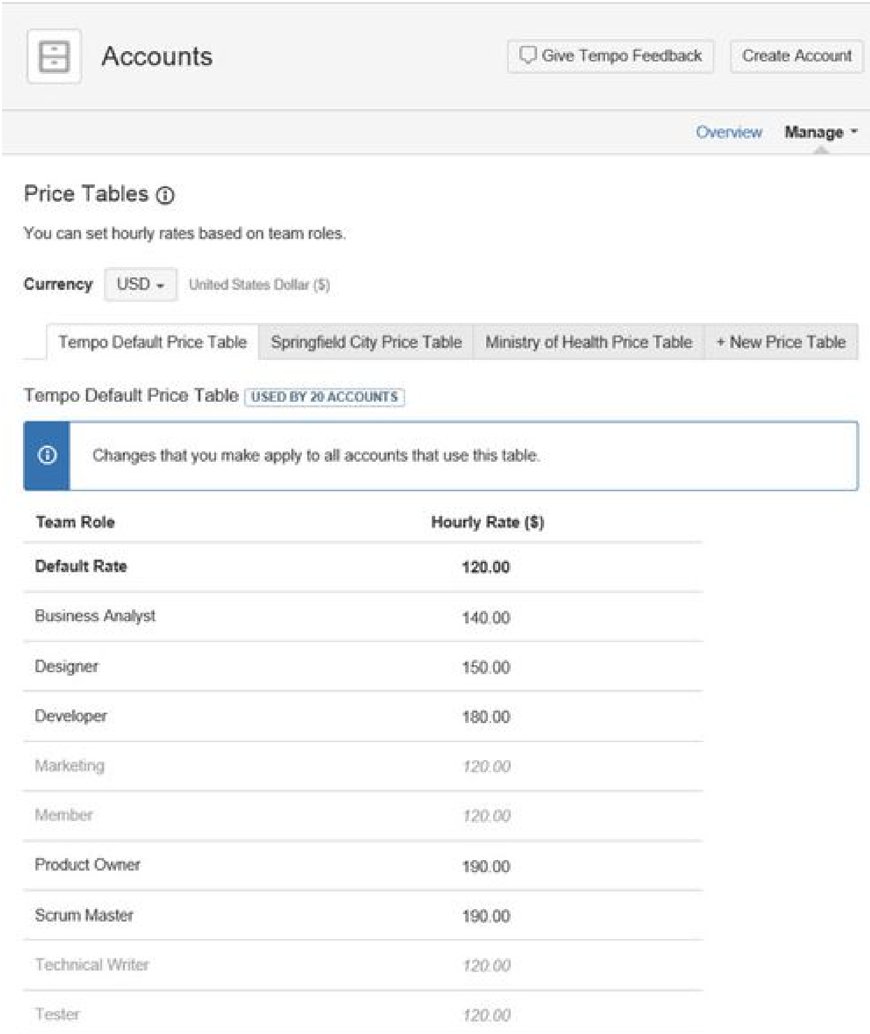


Selecting the Price Tables option opens the **Price Tables** screen as in the screenshot below.

The manage Price Tables main screen

On this page:

In this chapter:



The rate can be changed for each role in the list. The default rate will be used for team members without roles.

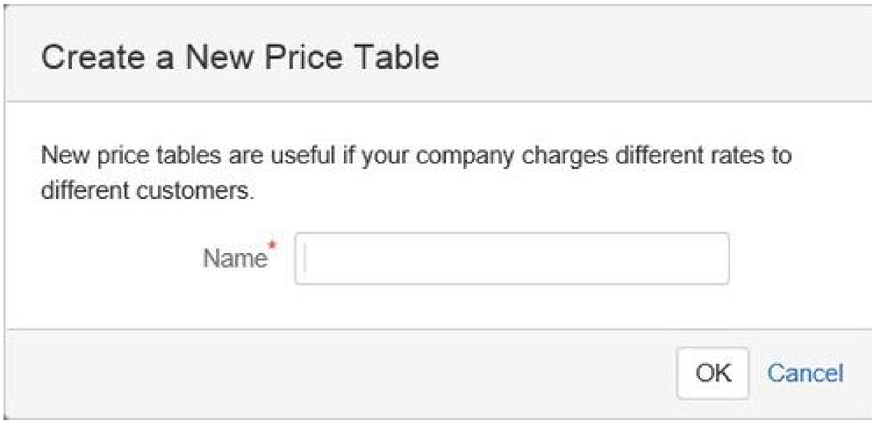
The price currency is chosen from a drop down above the price tables. Changes in currency will apply to all price tables.

Users with multiple roles
A user who is a member of multiple teams might have different roles in each team and therefore different price rates. By default, work on an issue is charged at the user's highest rate. You can set work to be charged at the user's rate for a particular team by selecting that team in the **Team** field of the issue.

Multiple Price Tables

Multiple price tables enable account managers to use different prices for different accounts. A new price table can be created by clicking on the **+New Price Table** tab. This will open a window prompting for a new name.

Create a New Price Table - click to enlarge



A lozange next to the price table header will show how many accounts are using the table.

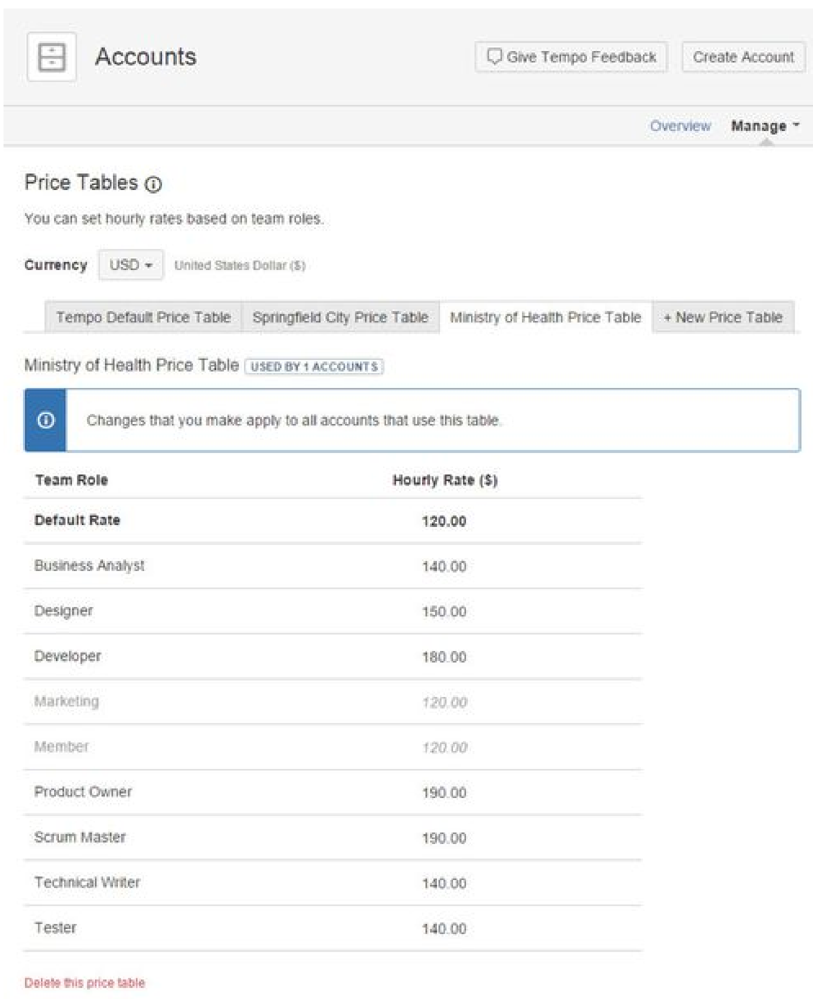
The new table will inherit rates and roles of the *Tempo Default Price Table*. Changes in the new table's rates will apply to the new table only.

The price tables can be connected to an account by selecting them in the Account price table.

Delete Price Table

An option to delete a price table can be found at the bottom of the table.

Delete Price Table - click to enlarge



It is not possible to delete the Tempo Default Price Table

If other accounts are using the price table to be deleted, they will be connected to the default account

Account price table

On this page:

Required permission

One of the following permissions or roles:

- Tempo Account Administrators permission
- Account Lead role

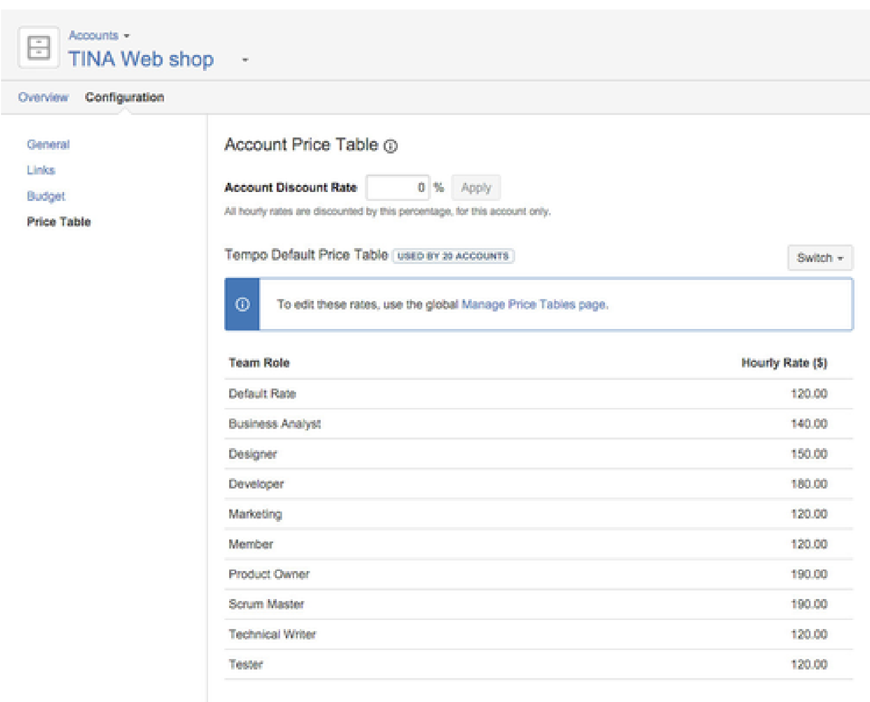
Account Price Table

It is possible to choose a price table for an account and define a discount for the price table in the **Account Price Table**. The Tempo Default Price Table will apply to the account unless otherwise specified.

Access Price Table:

1. From the Tempo drop down choose an account under **ACCOUNTS**
2. Click the **Configuration** tab under the account navigator
3. Press **Price Table** from the list to the left

Account Price Table - click to enlarge



Switching Price Tables

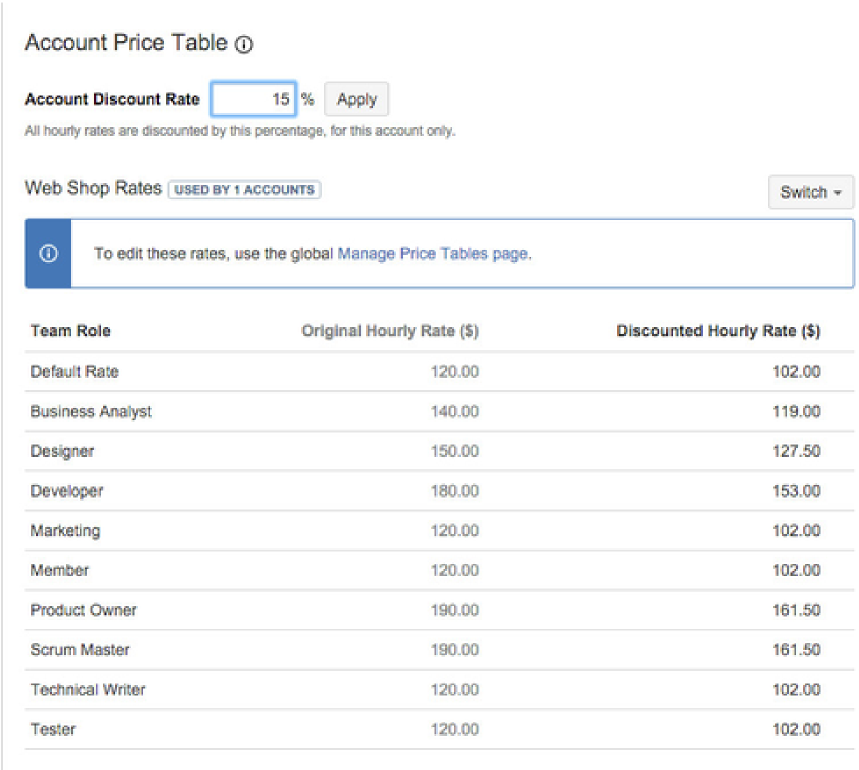
To associate a different price table with the account, do the following task:

Above the current price table, on the right side, in the box that contains the name of the price table, click the small down-arrow, and select a different price table from the list.

Account Discount

To add a discount to the account's price table, define a discount rate and press **Apply.** When a discount has been defined, a new column is displayed in the table with the discounted rates. The discounted rates are used for calculating revenue in the revenue report and the time-and-expenses report.

Discounted Rates - click to enlarge



Team Role	Original Hourly Rate ($)	Discounted Hourly Rate ($)
Default Rate	120.00	102.00
Business Analyst	140.00	119.00
Designer	150.00	127.50
Developer	180.00	153.00
Marketing	120.00	102.00
Member	120.00	102.00
Product Owner	190.00	161.50
Scrum Master	190.00	161.50
Technical Writer	120.00	102.00
Tester	120.00	102.00

Categorizing expenses

Required permission

One of the following permission types:

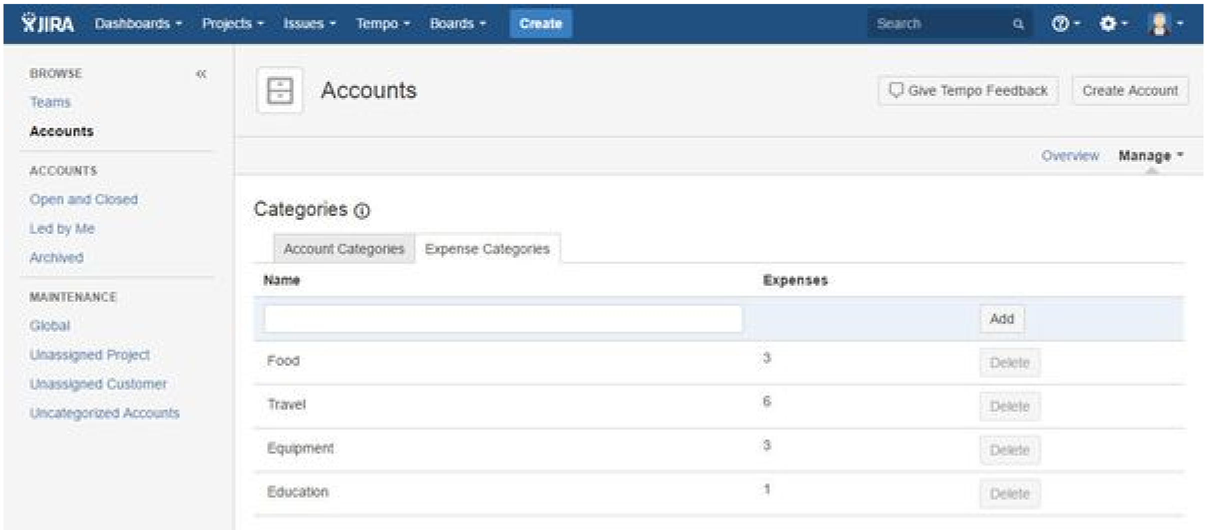
- JIRA Administrators
- Tempo Account Administrators

On this page

Adding an expense category

Expense categories are managed for sorting expenses displayed in the account's revenue report. For a better control of which categories are available for adding expense, Expense categories are configured in the Manage Categories.

Manage Categories - click to enlarge



Procedure

To add an expense category, complete the following steps:

1. On the top menu bar, click **Tempo** > ACCOUNTS **more**.
2. On the Accounts page in the upper-right corner, click **Manage** > **Categories**.
3. On the Categories page, click the **Expense Categories** tab.
4. Enter the name of the new category, and click **Add**.

Changing the name of an expense category

Procedure

To change the name of an expense category, complete the following steps:

1. On the top menu bar, click **Tempo** > ACCOUNTS **more**.
2. On the Accounts page in the upper-right corner, click **Manage** > **Categories**.
3. On the Categories page, click the name that you want to change.
4. Enter the new name, and click **Update**.

Deleting an expense category

If no expense is logged to a category, you can delete the category.

Procedure

To delete an expense category, complete the following steps:

1. On the top menu bar, click **Tempo** > ACCOUNTS **more**.
2. On the Accounts page in the upper-right corner, click **Manage** > **Categories**.
3. On the Categories page, on the line of the category that you want to delete, click **Delete**, and then click **OK**.

Related topics

- Viewing account revenue and target
- Adding expenses to JIRA issues

Adding expenses to JIRA issues

As well as logging time that you worked on an issue, you can log expenses to the issue.

If you log expenses to an issue, the Account Lead (for the account that is associated with the issue) can view the expenses in the Time and

Expenses report and on the account revenue graph. Other users with Manage Accounts permission can also view the report and graph.

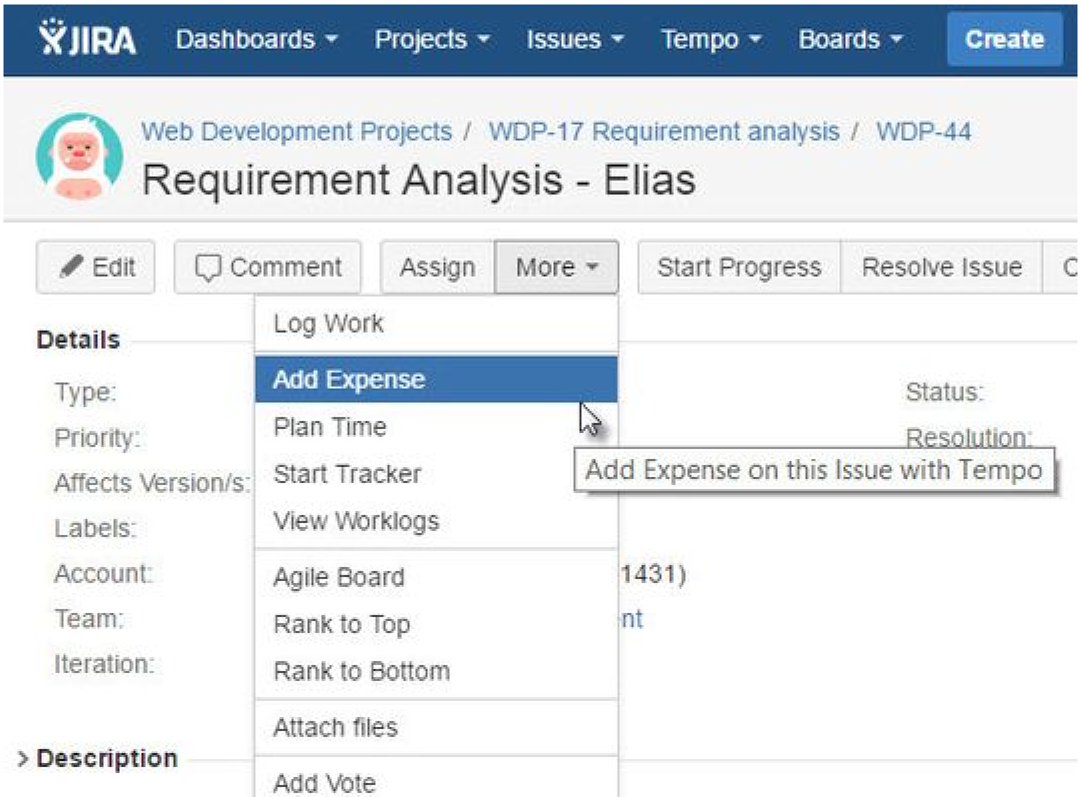
Required permission

Edit Issue permission (in JIRA)

Procedure

To add an expense to a JIRA issue, complete the following steps:

1. On the menu bar of the issue, click **More** > **Add Expense**.



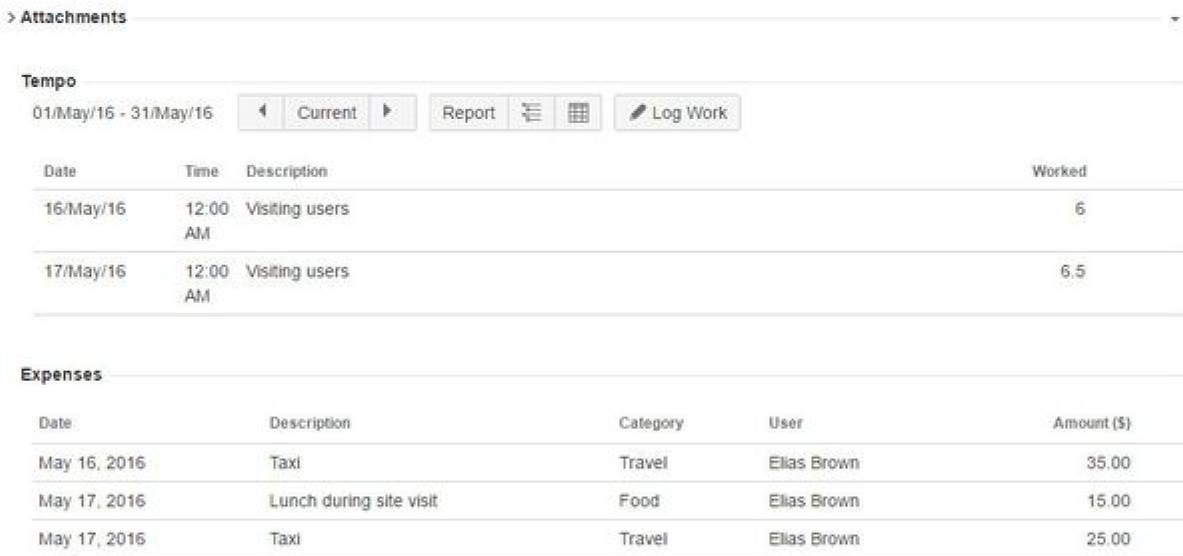
2. In the Add Expense window, fill in the requested information.

> **Tip**
> In the **Category** field, you can select an expense category from the list. Alternatively, you can create a new category, as in the following example to create the category 'Hotels':
>
> a. In the **Category** field, type `Hotels`.
> b. Underneath the field, click **Hotels - (New)**.

3. Click **OK**.

   In the **Expenses** section of the issue, only expenses that you added are displayed.

   Expenses section of a JIRA issue (Click to enlarge)



Tip
If the issue is editable, you can also edit or delete expenses.

Resolving unaccounted hours

Logged hours that cannot be associated with an account category type (for example, the Billable type or the Capitalized type) are said to be unaccounted for. Unaccounted hours are not correctly reported in the Utilization report or in the Revenue report.

On this page

Tutorial

Unaccounted hours

Viewing unaccounted hours

Required permission

One of the following permission types:

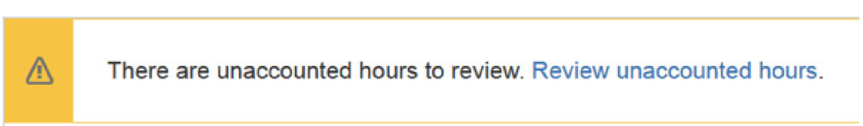
- JIRA Administrators permission
- Tempo Account Manager

Procedure

To view a list of unaccounted hours, complete the following steps:

1. On the top menu bar, click **Tempo** > ACCOUNTS **more**.

   The following message about unaccounted hours might be displayed near the top of the page:



If the above message is *not* displayed, all hours are accounted for.

2. If the above message *is* displayed, click **Review unaccounted hours**.

> **Tip**
> Alternatively, you can access the Unaccounted Hours page as follows: on the Accounts page, in the upper-right corner, click **Manage** > **Unaccounted Hours**.

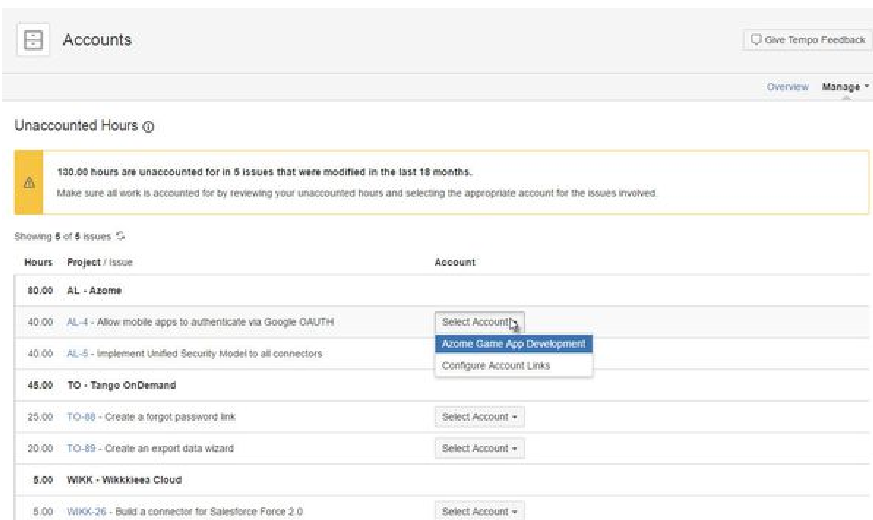
A list of projects and issues is displayed. Work was logged on these issues, but one of the following situations is true for each issue:

- The issue is not associated with an account.
- The issue is associated with an account, but the account is not linked to an account category.
- The issue is associated with an account, and the account is linked to an account category, but the account category is not linked to an account category type.

Accounting for hours

On the Unaccounted Hours page, you can account for hours for each issue by selecting the appropriate account, account category, or account category type.

Unaccounted Hours - click to enlarge



Related topics

- Viewing logged time by account type
- Viewing account revenue and target