Tempo Timesheets 8.0 Documentation

Administrator's guide to Tempo Timesheets

Administer Tempo Timesheets

Administer Tempo Core

- Creating a Workload Scheme
- Creating a Holiday Scheme

Administer Tempo Teams

- Teams Permissions
- Creating teams

Administer Tempo Accounts

- Accounts Permission
- Creating accounts

PDF version of documentation

Administrator's Guide (PDF, 2 Aug 2016)

Global configuration

In order to use Tempo Timesheets, Time Tracking in JIRA needs to be enabled and activated:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Choose the **cog icon** at top right of the screen, then choose **System**, select **Issue Features > Time Tracking** (left tabs).
   Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **time t**.
3. Write a value in **Hours per day** and **Days per week** fields, but those values are used in Tempo Default Workload Scheme.
4. Click the **Activate** button to turn time tracking ON.

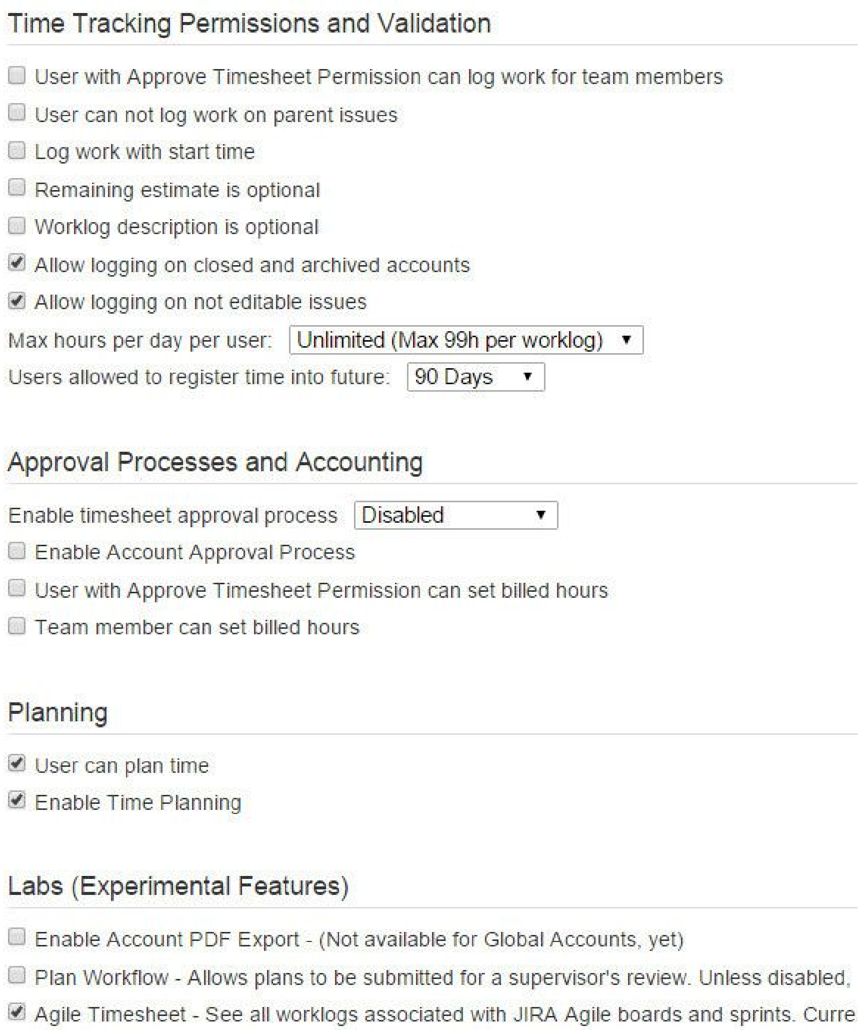
In this chapter

This page gives an overview of Global Configuration for Tempo Timesheets.

To open the Global Configuration:

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

The default values for the Global Configuration



Time Tracking Permissions and Validation

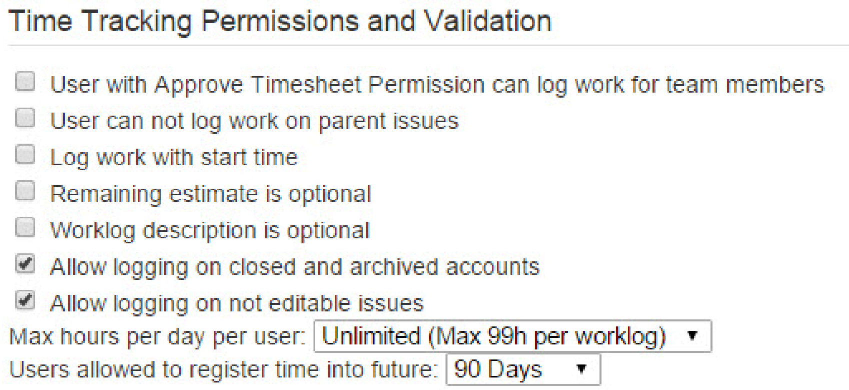
This page explains the **Time Tracking Permissions and Validation** options as part of Tempo Timesheets Global configuration.

In this chapter

To open the Global Configuration:

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

The Time Tracking Permissions and Validation options in Global Configuration



Each item from the screenshot is explained in the table below.

Table: Time Tracking Permissions and Validation explained

Option	Default	Description
User with Approve Timesheet Permission can log work for team members	No	If *enabled*, users with the Approve Timesheet permission, can log work and edit hours for all their team members.
User can not log work on parent issues	No	If *enabled*, an error message is displayed (in the log work window) when a Tempo Timesheets user tries to submit a work-log for an JIRA issue with sub-tasks.
Log work with start time	No	If *enabled*, a Tempo Timesheets user can set start time when logging work. **Note!** A useful reading on the difference between my JIRA worklog and my Tempo worklog.
Remaining estimate is optional	No	If *enabled*, and an issue has no *Original estimate*, the *Remaining estimate* is not calculated in the time-tracking entry. Again if enabled and an issue has Original estimate, the Remaining estimate is reduced by the time spent until the value 0 is reached. The Remaining estimate can not be a negative number, but if it has reached 0, the user can add a new one.
Worklog description is optional	No	If *enabled*, and no text is written in the Log Work Description field, a default text *Working on Issue $key* is added. As with any text in the Log Work Description, the default text can still be edited.
Allow logging on closed accounts	Yes	If *disabled*, it is not possible to log work on an issue that has an account in closed status.

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

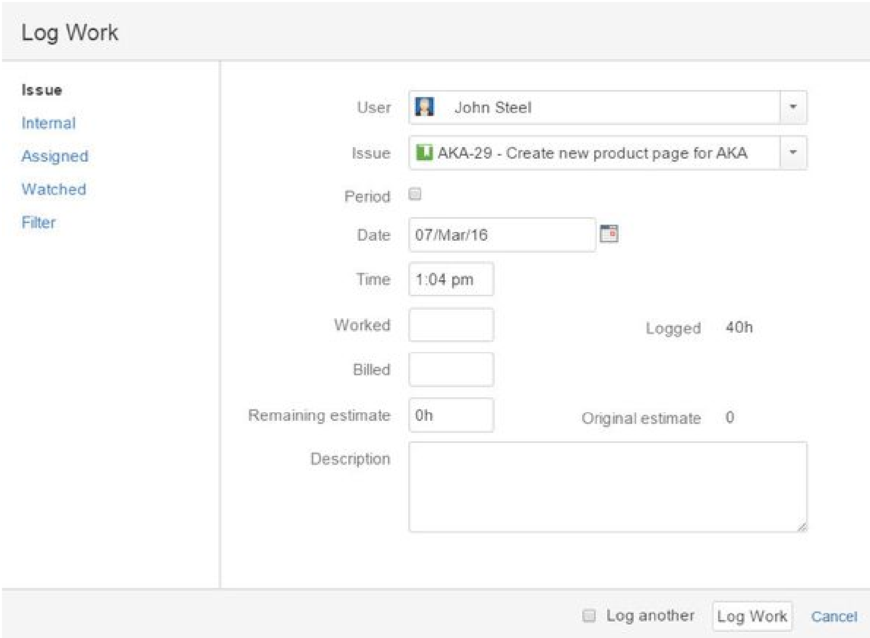
Log work with start time

This page explains further the option **Log work with start time** in Global configuration and falls under the Time Tracking Permissions and Validation. This option is disabled by default, but if enabled any Tempo Timesheets user can set start time when logging work. This means that the **Date** field in the Log Work window changes to a date/time field in the enabled case. The current time is used as the default time for the current date, before the user logs the start time.

In this chapter

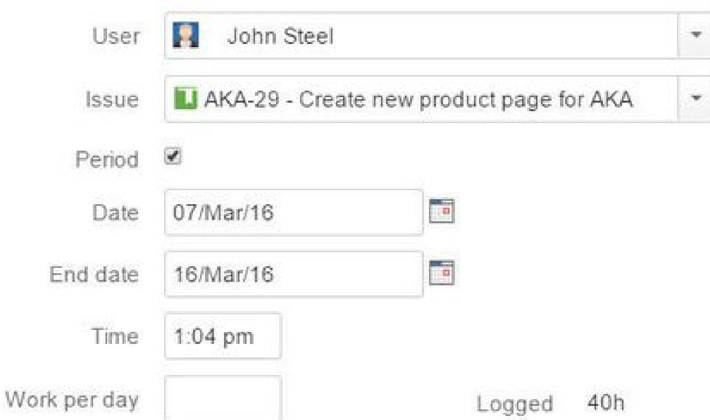
Enabling the option is not valid for the Plan Time window.

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



Following are a few facts about this option:

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



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

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

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

Approval Processes and Accounting

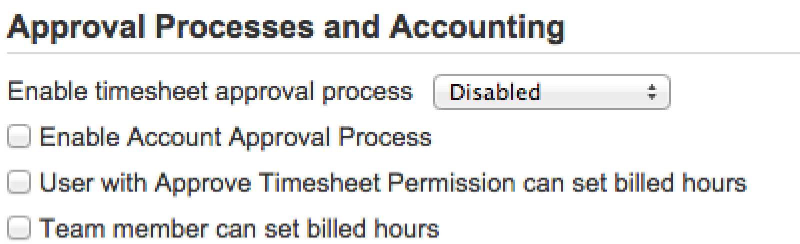
This page explains the **Approval Processes and Accounting** options as part of Tempo Timesheets Global configuration.

In this chapter

To open the Global Configuration:

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

The Approval Processes and Accounting in Global Configuration



Available Options

Enable timesheet approval process	Default Value: Disabled

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

Enable Account Approval Process	Default Value: No

If *enabled*, Team Leads (the users with the Approve Timesheet permission) can approve an account which is managed through Tempo Accounts. Approved status icon is displayed in the Account Timesheet, a green bullet for approved items and a red bullet for the ones that still need to be approved. The Approval button is disabled until the period has been closed for Team Leads and Team members in the Period management. This is documented on the Account Timesheets page.

User with Approve Timesheet Permission can set billed hours	Default Value: No

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

Team member can set billed hours	Default Value: No

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

Planning Options

This page explains the **Planning** options as part of Tempo Timesheets Global configuration.

In this chapter

To open the Global Configuration:

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

The Planning options in Global Configuration

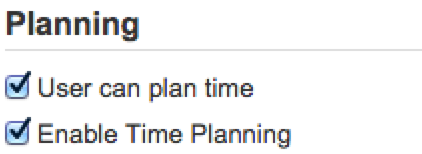


Table: Planning explained

Option	Default	Description
User can plan time	Yes	When *enabled*, this means the **Plan Time** button will show up in all timesheets, except the Account Timesheet for team members**.**
Enable Time Planning	Yes	When *enabled*, this means the **Plan Time** button is activated and will show up in in all timesheets, except the Account Timesheet for users with the Approve Timesheet permission (may also be Team Leads). This allows the Team Leads to do high level planning to allocate people on JIRA projects and it's versions or components.

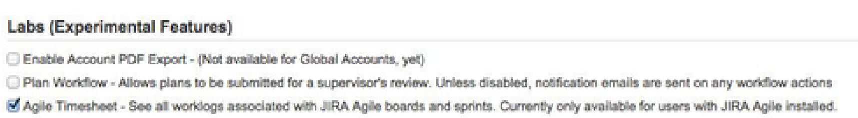
Tempo Labs

This page explains the **Labs (Experimental Features)** options as part of Tempo Timesheets Global Permission.

To open the Global Configuration:

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

The Labs (Experimental Features) options in Global Configuration (click to enlarge)

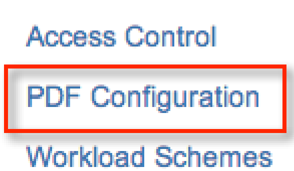


The Labs options enable our customers to test some exciting new functionality and give a sneak preview of new features coming in future releases.

In this chapter

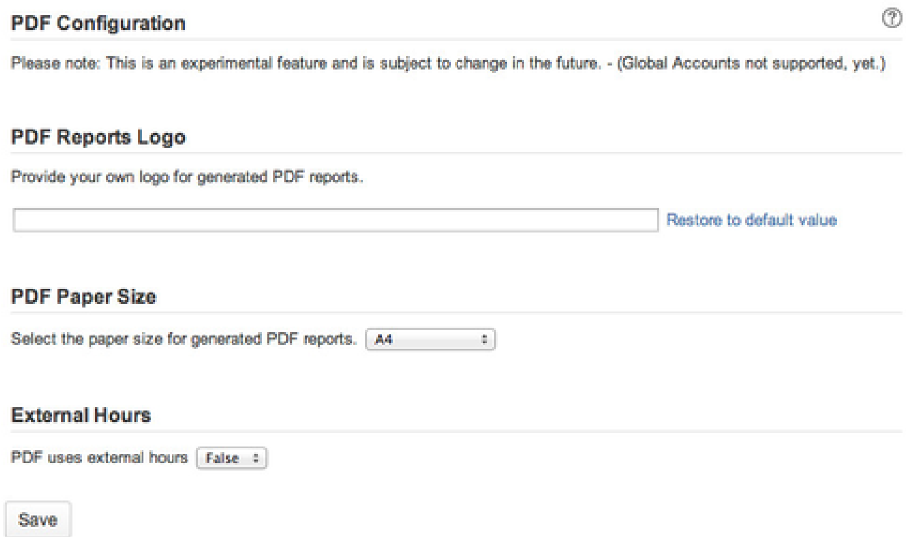
Account PDF Export

This feature is disabled by default. If *enabled*, ODF Configuration option is added to the Tempo Timesheets administration menu.



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

The PDF Configuration page overview (click to enlarge)



The PDF Configuration page is explained below:

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

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

With this feature enabled, the option Export to PDF becomes available in the Export menu for the Report view of the Account Timesheet and in Tempo accounts navigator.

Plan Workflow

This feature is disabled by default. If *enabled*, users can send an approval request for planned time to the user with the Approve Timesheet permission for their team.

Agile Timesheet

This option is *enabled* by default and adds a **Time Tracking** option, to the **View in Tempo** menu, in the header of each JIRA Agile board. It allows the user to see all worklogs associated with JIRA Agile epics and/or sprints in the Agile Timesheet. This is currently only available for users with JIRA Agile installed.

Changing date and time formats

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

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

Required permission

JIRA Administrators permission

Procedure

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

Examples

Time Format

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

Day/Month/Year Format

Example used: 1 September 2016

Starting with the day

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

Starting with the month

Result	Format
09/01/2016	MM/dd/yyyy
09.01.2016	MM.dd.yyyy
9/1/2016	M/d/yyyy
09/01/16	MM/dd/yy

9/1/16	M/d/yy
Sep 01, 2016	MMM dd, yyyy
Sep 1, 2016	MMM d, yyyy
Sep/01/16	MMM/dd/yy
Sep/1/16	MMM/d/yy
September 01, 2016	MMMM dd, yyyy
September 1, 2016	MMMM d, yyyy

Starting with the year

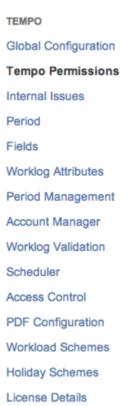
Result	Format
2016-09-01	yyyy-MM-dd
2016.09.01	yyyy.MM.dd
20160901	yyyyMMdd
2016 Sep 01	yyyy MMM dd

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

Tempo permissions

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

In this chapter



JIRA Administrators permission is used to access all the administrative functions available for Tempo products. The options that are displayed in the Tempo administration section depend on which Tempo products are installed.

Besides the JIRA Administrators permission, other permissions are defined for Tempo, as explained in this chapter.

Permissions used in Tempo Timesheets

Tempo time-tracking permission

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

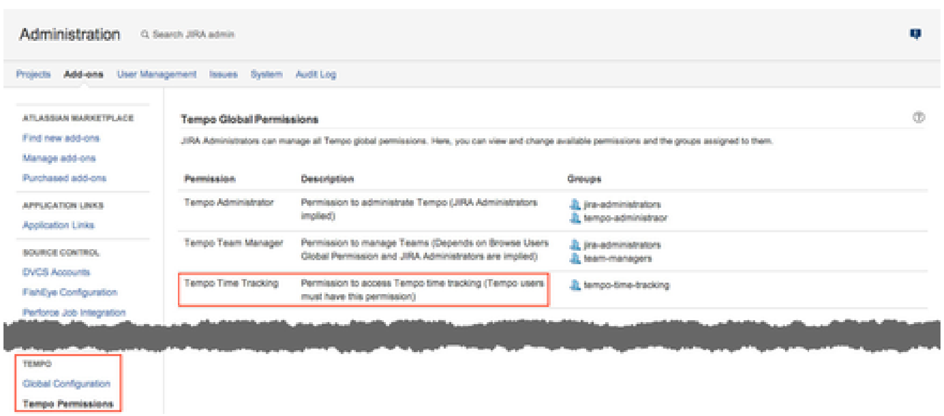
In this chapter

This page explains the Tempo Time Tracking global permission. This permission gives access to the Tempo Timesheets product.

To configure Tempo Time Tracking, open the **Tempo Permissions** screen in the Tempo administration:

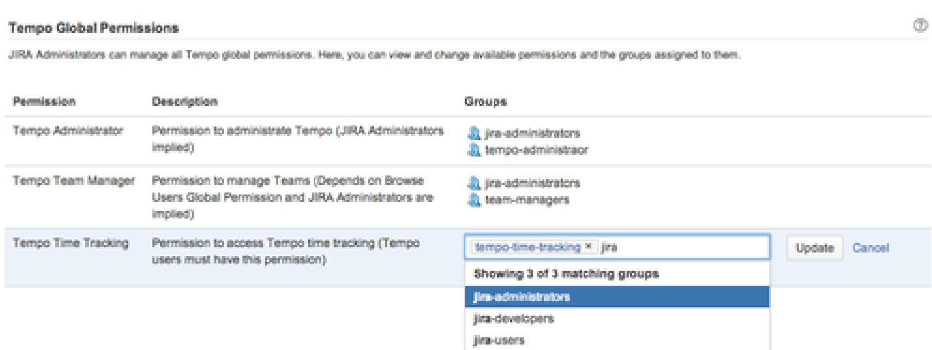
1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Scroll down the left sidebar until you see the **Tempo** configuration group and select **Tempo Permissions**.
   Tip: Use Keyboard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

Tempo Time Tracking in Tempo Global Permissions (click to enlarge)



To edit or give users the Tempo Time Tracking permission, click on the **Groups** field as in the screenshot below and start writing the beginning of a previously created JIRA Group. To finish the editing, click on the **Update** button to save the change or the **Cancel** link to proceed without changes.

Adding JIRA group(s) to the Tempo Time Tracking permission (click to enlarge)



The default JIRA Groups used for this permission, are **jira-administrators** and **jira-developers** (in Atlassian Cloud they are called **administrators** and **developers**).

If you are trying to Log Work or Plan Time on a JIRA user that does not have this permission, you will get a message in these dialogs that says: **User is not Tempo User**.

Permissions to view worklogs

Using Tempo Project Manager Role

In this chapter

User who are in the Tempo Project Manager role can view all worklogs within a particular project.Users who are not in the role can only see their own worklogs.

- To allow users or groups to see all worklogs in a particular project add them to the Tempo Project Manager role:
  - Configure the Tempo Project Manager Role
- To add users or groups as default members in the role - use the *Manage Default Members* option in JIRA:
  - Managing Project Roles - specify 'default members' for a project role

Another possible reason worklogs aren't viewable in Tempo is if the user is missing the JIRA *Browse Projects* permission, see No Access notification page for more info.

No Access notification

No Access in Tempo Timesheets

In this chapter

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

Why is No Access displayed

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

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

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

- Managing Project Permissions

Permissions to edit worklogs

Edit worklogs in Tempo Timesheets

In this chapter

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

Issue not Editable

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

- As a JIRA user
  - Try transitioning the issue to an editable status in the workflow (e.g. from Closed to Reopened)
- As a JIRA Administrator
  - Edit the JIRA workflow status and set the 'Issue.editable' property as true

You lack permission to "Work On Issues"

JIRA defines this project permission in order to allow JIRA administrators to manage who can log work against an issue, i.e. create a worklog entry. In order to edit worklogs not currently editable for this reason:

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

        - Managing JIRA Project Permissions

You lack permission to "Edit Own Worklogs"

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

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

You lack permission to "Edit All Worklogs"

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

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

Week is closed

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

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

User doesn't have Approve Timesheet permission

User who doesn't have Approve Timesheet permission in Tempo can't edit team member worklogs. To be able to edit team members worklogs:

- As a Tempo Team Manager
    - Add the user in question to the Approve Timesheet permission as described on the Team Permissions page

User Timesheet is not Open

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

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

Period is closed

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

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

Account has been closed

Tempo allows Account Managers to close accounts when users should no longer be able to log work on an Account. In order to edit worklogs currently not editable for this reason:

- As an Account Manager with Manage Accounts permission
    - Open the account in question as described on the Configuring an account page
    - Change the *Allow logging on closed accounts* settings in Tempo Global configuration

Approve Timesheet permission

Using Approve Timesheet permission

User with the Approve Timesheet permission can do the following in Tempo Team Timesheet.

1. View Team Timesheet for the team including the sum of all worklogs logged by team members
2. View User Timesheet for members in the team
3. Approve timesheets for team members if Timesheet Approval Process is enabled
4. Open a Grace Period if timesheet has been closed in Tempo Scheduler

This permission is also currently used in Account Timesheets if Account Approval Process is enabled in Tempo Global configuration.

Permissions for managing revenue and billing

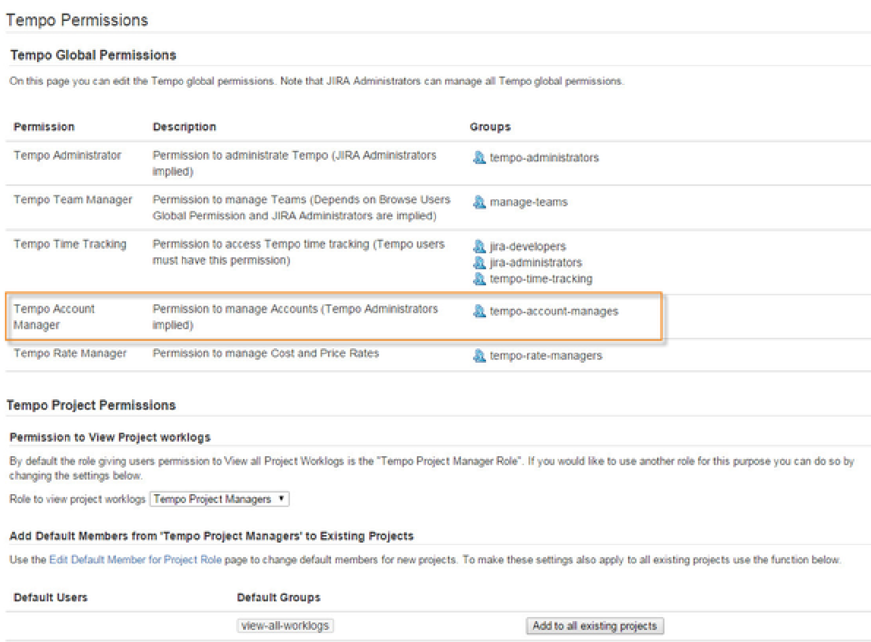
Permission for revenue and billing is managed in Tempo Core and Tempo Accounts, system plugins bundled with Tempo Timesheets.

Manage Accounts

Tempo Account Manager permission gives access to manage accounts.

This involves being able to create an account manually, import and export of accounts and configuring accounts.

Tempo Permissions administration page - click to enlarge



Manage Rates

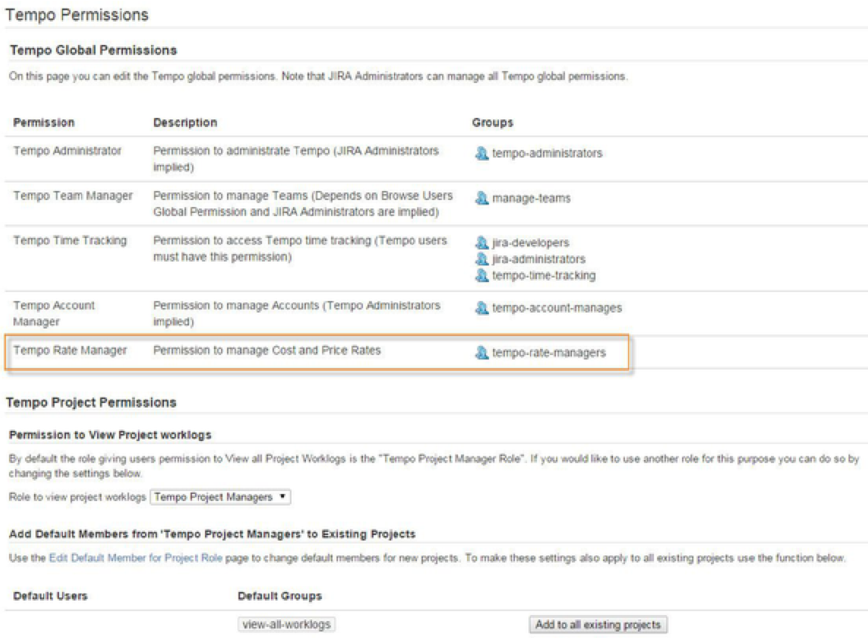
Managing rates permission gives access to add and edit Setting price rates

Tempo Rate Manager in administration page - click to enlarge

In this chapter

Related pages

- Tempo Accounts
- Tempo Permissions



Browse Customer Revenue

Browse Customer Budget permission gives access to view Revenue and Reports for accounts connected to the customer.

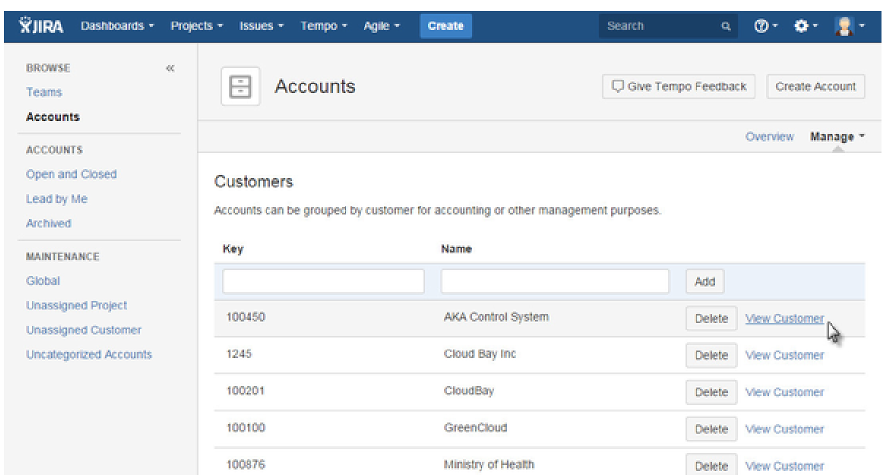
Browse customer revenue

Browse Customer Revenue permission gives access to view Revenue and Reports for accounts connected with the customer

To configure who has this permission, go to Tempo accounts navigator:

1. Choose *Customers* from the *Manage* drop-down
2. Select View Customer for a particular customer

View Customer link opens the customer overview page (click to enlarge)



Add user or group to Browse Customer Revenue

How to:

1. Select Configuration on Customer Overview page
2. Click on the **Users** or **Groups** field
3. Writing the beginning of the name of a previously created JIRA Group or JIRA User

Related pages

- Tempo Accounts
- Granting permission to users

4. Choose the correct name from the list of suggestions
5. Click on the **Update** button to save the change or the **Cancel** link to proceed without changes

Managing rates

Manage Rates permission is managed in Tempo Core and Tempo Accounts, system plugins bundled with Tempo Timesheets.

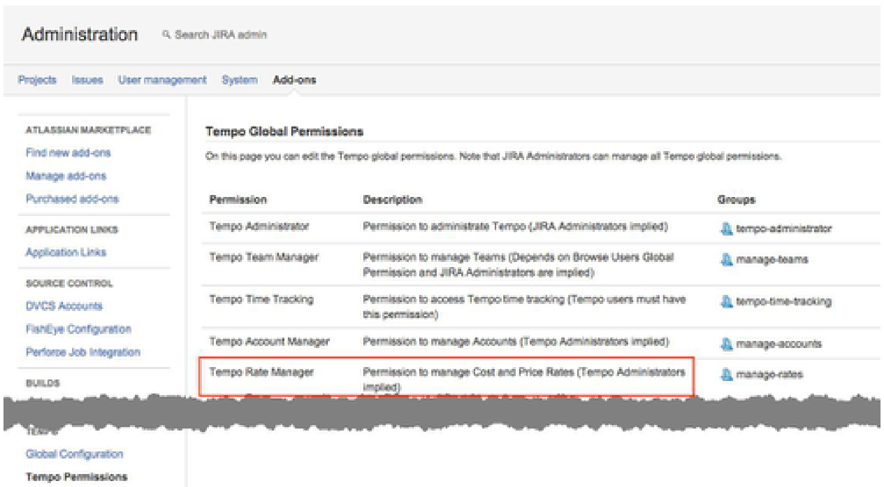
In this chapter

This page explains the **Manage Rates** (Tempo Rate Manager) global permission. Manage Rates gives access to add Cost Rates and Price Rates that are used in budgeting and billing.

To configure who has this permission, go to **Tempo Permissions** in the Tempo administration:

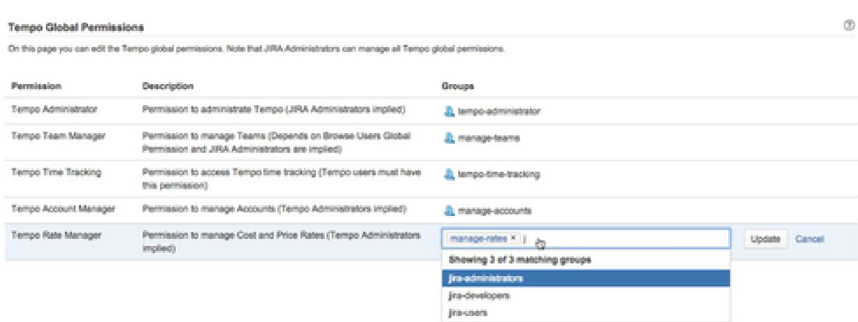
1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Scroll down the left sidebar until you see the **Tempo** configuration group and select **Tempo Permissions**.
   Tip: Use Keyboard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

Tempo Rate Manager in Tempo Global Permissions (click to enlarge)



To edit or give users the Manage Rates permission, click on the **Groups** field as in the screenshot below and start writing the beginning of a previously created JIRA Group. To finish the editing, click on the **Update** button to save the change or the **Cancel** link to proceed without changes.

Adding JIRA group(s) to the Manage Rates permission (click to enlarge)



The Manage Rates permission implies Tempo Administrator, which is set on a default group tempo-administrator.

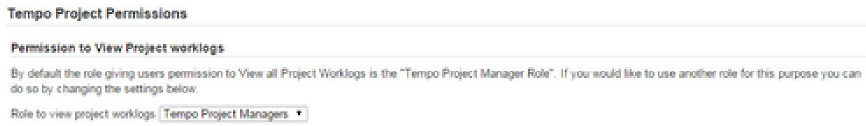
Tempo Project Role Management

On this page

In this chapter

Permission to View Project worklogs

By default the role giving users permission to View all Project Worklogs is the "Tempo Project Manager Role". If you would like to use another role for this purpose you can do so by selecting another Project Role already configured on your instance.

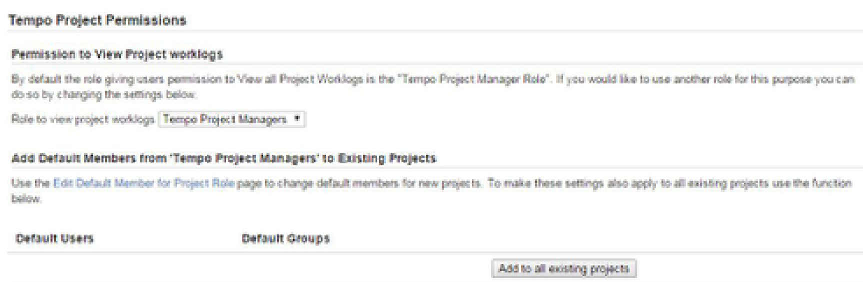


Add Default Members to Existing Projects

The Edit Default Member for Project Role link is opening the Project Role Browser on your JIRA instance where you can change default members for new projects.

To make the default settings also apply to all existing projects:

1. Log in to JIRA as a JIRA Administrator.
2. Choose the **Projects Role** from a list of available roles.
   The default members for the selected role are displayed below
3. Click the *Add to all existing projects* button.



Verify that the selected role is not used in JIRA permission scheme if you want to restrict this permission to view worklogs in Tempo Timesheets.

> We suggest that you create a JIRA group for this role i.e. view-tempo-worklogs as it is easier to maintain users directly in the group.

Add Users to Project Roles

To add users and groups to the Tempo Project Managers role:

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 **Roles** screen from the left sidebar, where the role is configured and/or updated.

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

Defining a working week

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

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

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

Related topic

Specifying public holidays

Creating types of working weeks

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

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Tutorial

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

The tutorial covers two topics:

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

Procedure

To create a workload scheme, complete the following steps:

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

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

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

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

associated with the default scheme.

What to do next

Move employees to the new workload scheme.

Related topic

Creating sets of public holidays

Editing types of working weeks

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

Required permission

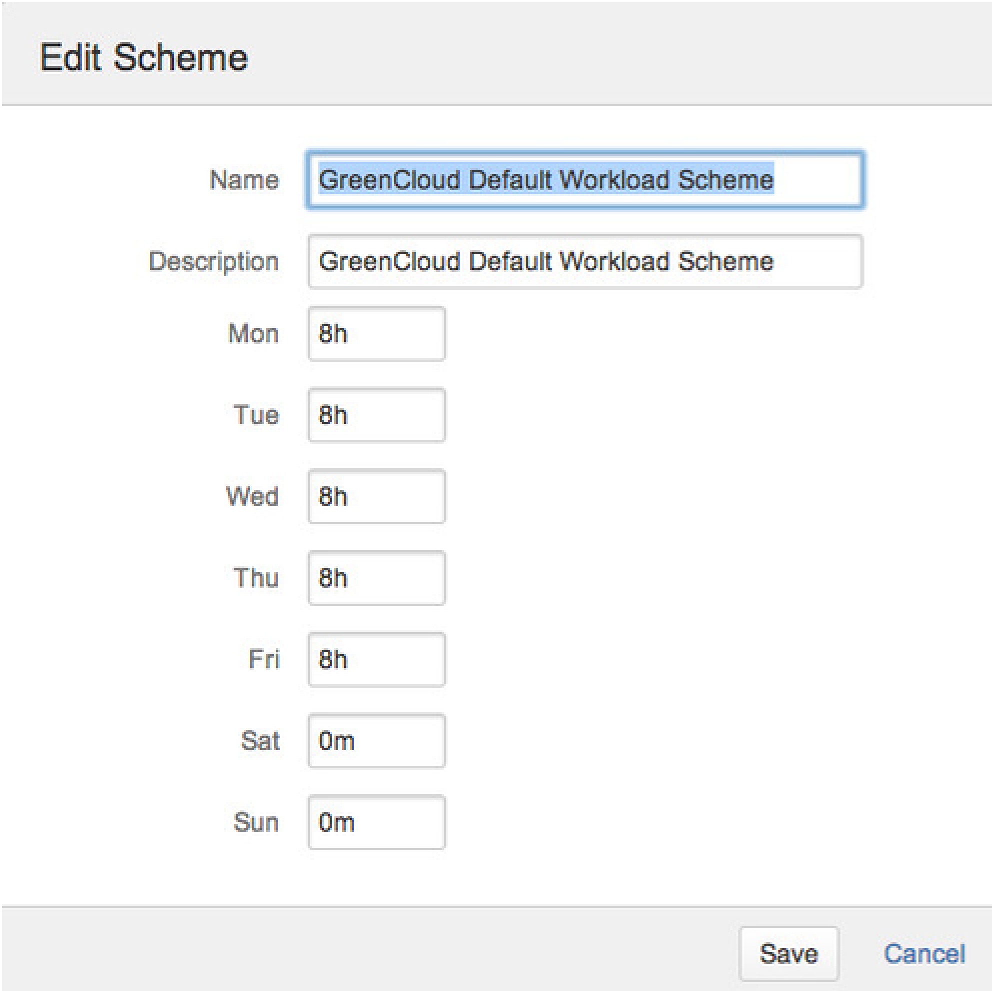
One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Procedure

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

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



Related topics

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

Switching types of working weeks

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

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Tutorial

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

The tutorial covers two topics:

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

Procedure

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

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

Related topics

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

Setting the default type of working week

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Procedure

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

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

Tips

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

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

Related Topic

Setting the default set of public holidays

Deleting types of working weeks

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Procedure

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

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

Related topics

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

Specifying public holidays

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

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

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

Related topic

Defining a working week

Creating sets of public holidays

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

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Procedure

To create a holiday scheme, complete the following steps:

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

    Example
    The name of the scheme might be "Kuala Lumpur Office," and the description might be "Malaysian national holidays."
4. Click **Add**. The new holiday scheme is added to the list.

What to do next

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

Related topic

Creating types of working weeks

Adding days to sets of public holidays

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

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Tutorial

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

The tutorial covers two topics:

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

Procedure

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

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

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

5. Click **Add**. The new public holiday is added to the list.

Switching sets of public holidays

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

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Tutorial

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

The tutorial covers two topics:

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

Procedure

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

1. Do one of the following tasks:

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

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

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

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

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

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

Related topics

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

- Switching set of public holidays (alternative method)

Setting the default set of public holidays

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Procedure

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

1. Do one of the following tasks:

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

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

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

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

Related topic

Setting the default type of working week

Deleting days from sets of public holidays

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Procedure

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

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

Deleting sets of public holidays

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

Procedure

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

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

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

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

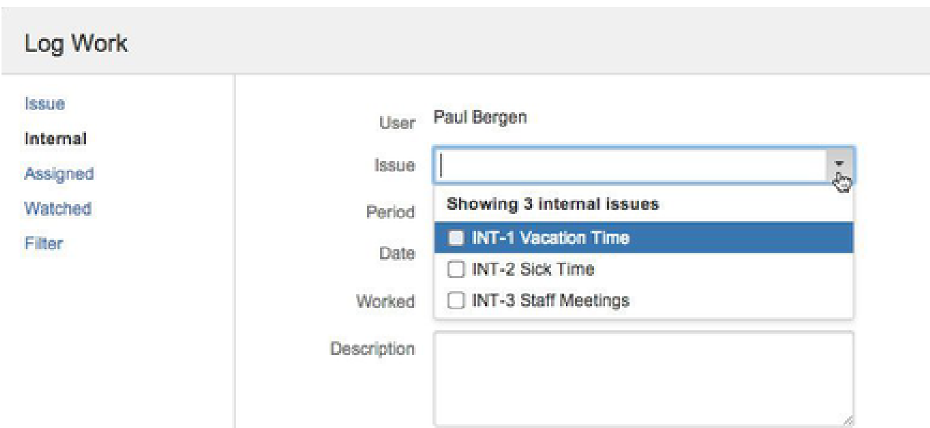
Related topics

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

Configuring internal issues and activities

Internal Issues

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

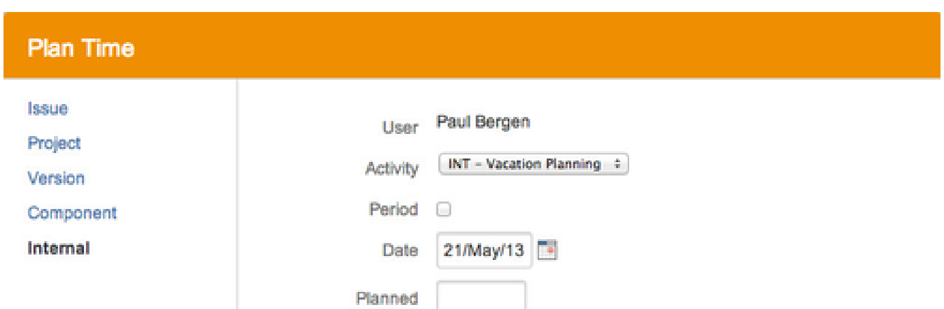


In this chapter

Video

Internal Activities

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



Configure internal issues

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

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

In this chapter

Internal Issues

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

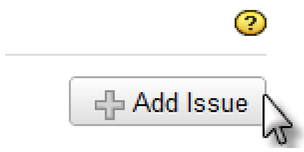
An issue can be selected from existing JIRA issues and modified into an **Internal Issue**.
An internal issue has the following properties:

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

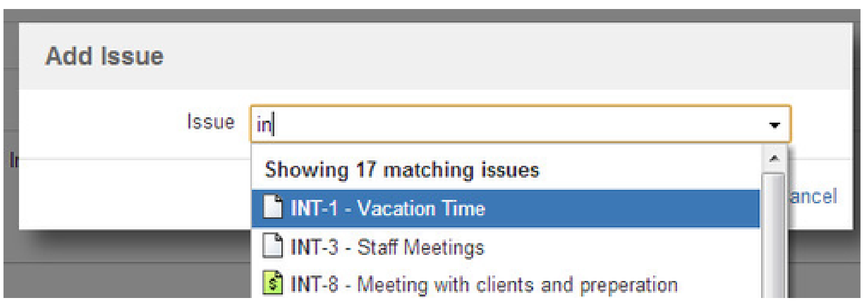
Users that don't have Work On Issues permission in a JIRA project that has issues selected as internal will not see those issues in their list.

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

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



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



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

Order	Issue key	Issue description	Operations
⬇	INT-1	Vacation Time	Delete
⬆ ⬇	INT-2	Sick Time	Delete
⬆ ⬇	INT-3	Staff Meetings	Delete
⬆ ⬇	SUPPORT-5	General customer support	Delete
⬆ ⬇	CLOUD-24	Planning and Retrospective meetings	Delete
⬆	CLOUD-25	Customer Relations	Delete

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

Configure internal activities

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

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

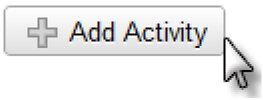
In this chapter

Internal Activity

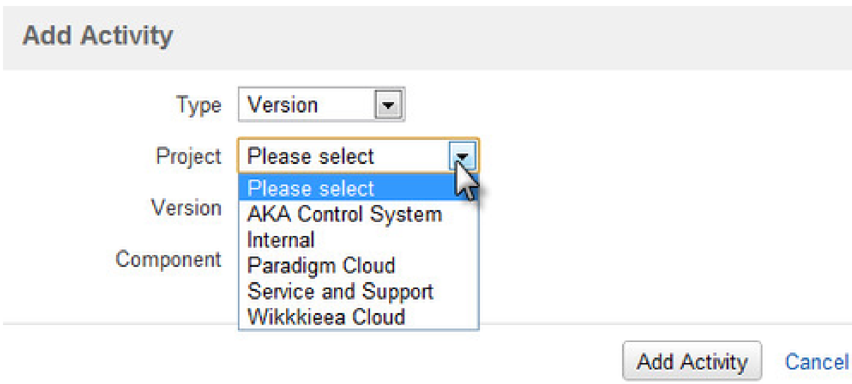
Activity is a **Project**, **Version** or a **Component**.
Internal activity is intended for vacation **planning** and other 'out of office' time allocation.

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

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

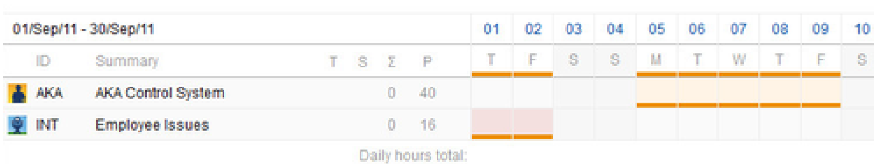


2. The **Add Activity** window is displayed;

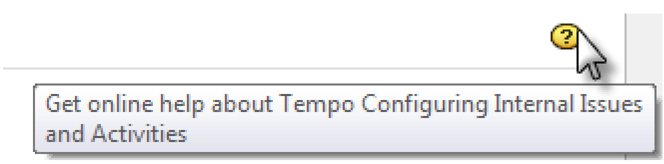


3. Select **Type** - **Unscheduled**, **Version** or **Component**
   Select **Unscheduled** of you want to plan on a **Project** level.
4. Select **Project** from a list of JIRA projects.
5. Select **Version** or **Component** according to your select in the **Type** field.
6. Click the **Add Activity**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

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



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



Configuring worklog attributes

Attributes can be added to the worklogs. Examples of a worklog attribute are **Overtime**, **Not Billable** and **Driving cost**. These attributes are sent with the worklog.

Adding Worklog Attributes involves the following steps:

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

In this chapter

Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Worklog Attributes**.

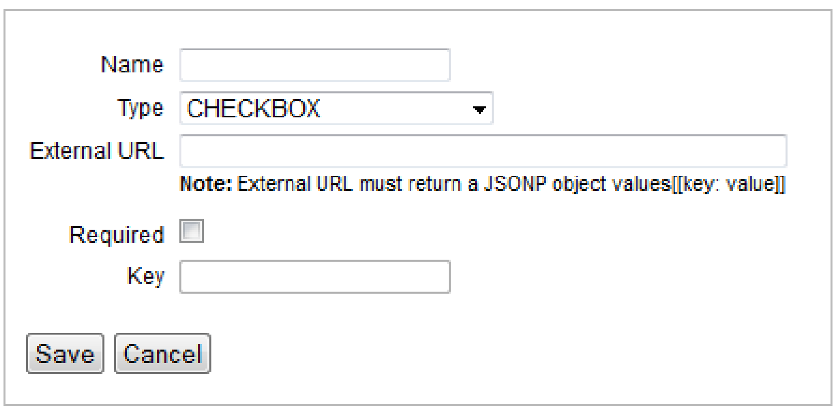
Worklog Attributes screen (click to enlarge)

You can change the attribute list order by using the and icons.

To add a **Worklog Attribute** to the list, do the following:

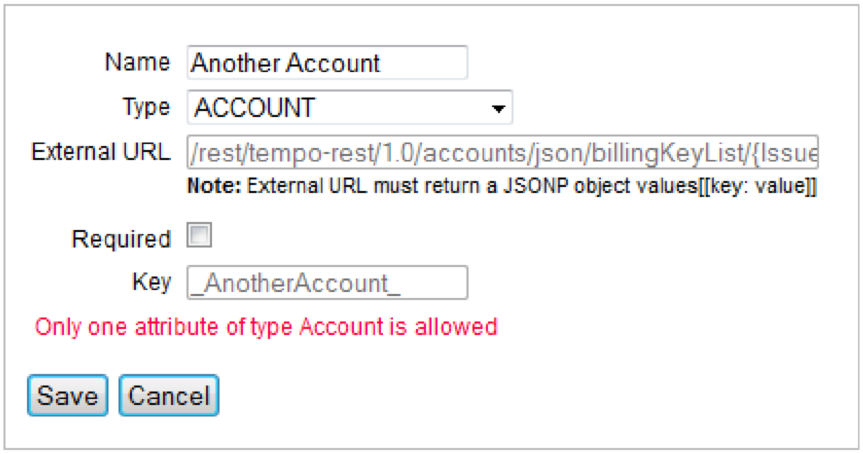
1. Click the **Add Attribute** button

2. The **Add Worklog Attribute window** will display;

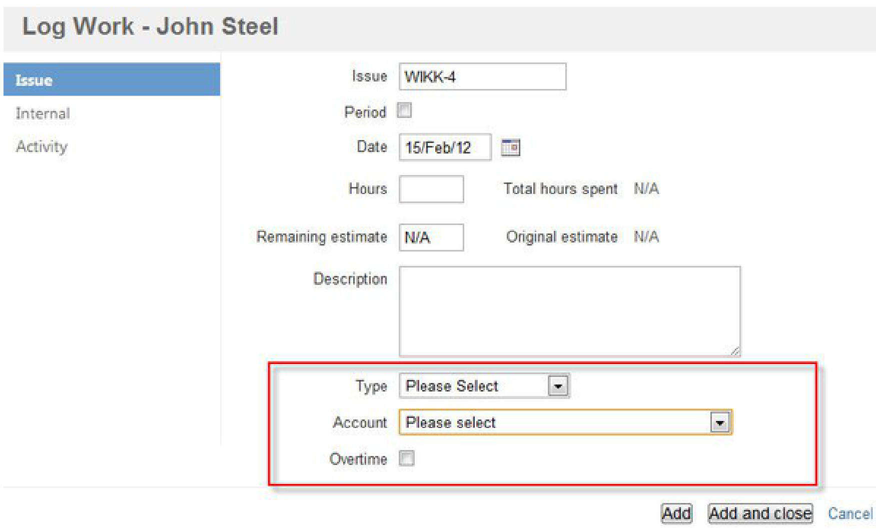


3. Write down a descriptive **Name** for the attribute;
   Please note that the name can be changed but the key is fixed to the first name of the attribute.
4. Select one of the following attribute Types:
   a. **Checkbox**
   b. **Input field**
   c. **Dynamic Drop Down**
      i. Write a url in the **External URL** field.
         See Tempo dynamic drop-downs page for more info.
   d. **Script**
      i. Write a url in the **External URL** field.
         Note, this option is not available if your setup is on JIRA cloud instance.
   e. **Account**
   f. **Input Numeric**
      i. Numeric values that can be summed up in the report exported excel file.
5. Check if the worklog attribute is **Required**;
6. Click the **Save** button if you are done or **Cancel** to close without saving;
7. Repeat steps 1-5 according to your needs.

The **Account** attribute can only be created once to add the Account as a worklog attribute, which will link the **Account** attribute to the **Worklog** itself but not the **JIRA issue**. The **Account** is normally inherited from the JIRA issue, but creating an **Account** attribute means that that connection is broken. Note that the **Account** is read from the issue if none exists on the worklog. This is to ensure backwards compatibility.



All **Worklog Attributes** are displayed in the Tempo Logging Work window and can be edited In-line in timsheets and in the report and list views.



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

Account as a worklog attribute

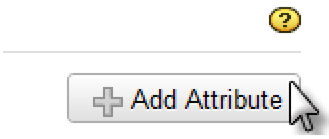
This is a child page of Configuring worklog attributes, explaining how to add accounts as worklog attribute. The Account attribute can only be created once to add the Account as a worklog attribute, which will link the Account attribute to the worklog itself but not the JIRA issue. The account is normally inherited from the JIRA issue, but creating an Account attribute means that that connection is broken.

In this chapter

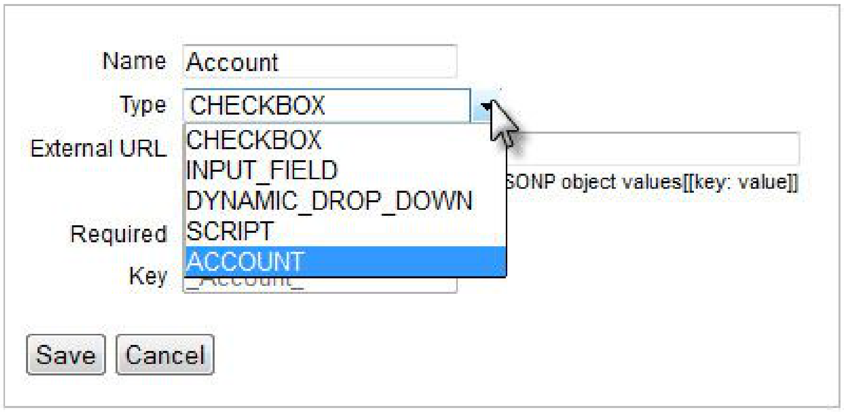
Note that the account is read from the issue if none exists on the worklog. This is to ensure backwards compatibility.

To add the Account as a Worklog Attribute do the following:

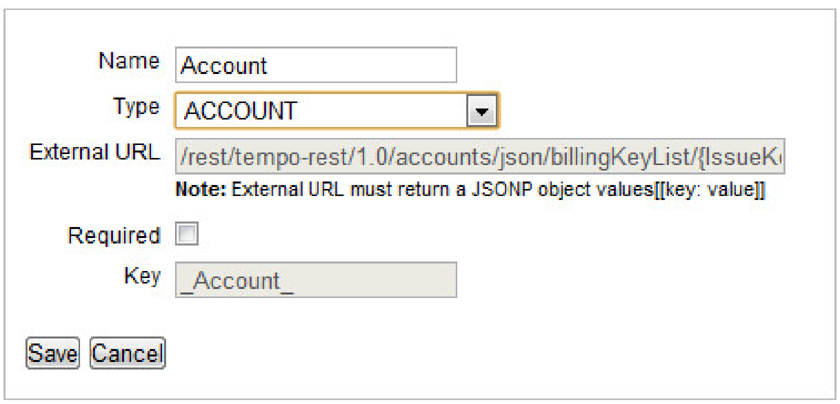
1. Click the **Add Attribute** button.



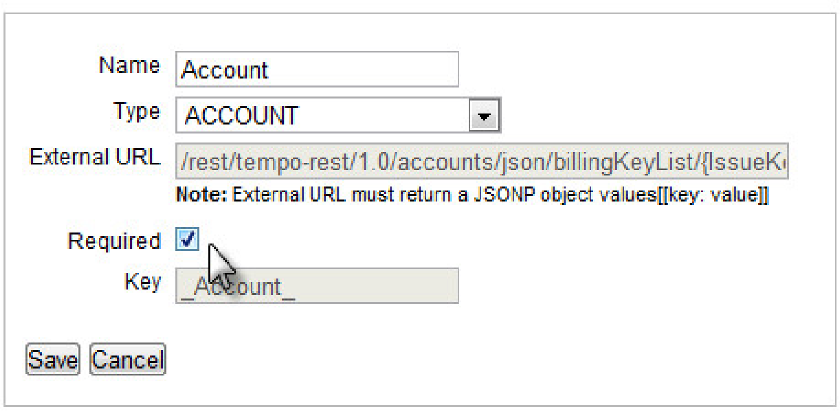
2. Select **Account** from the **Type** list:



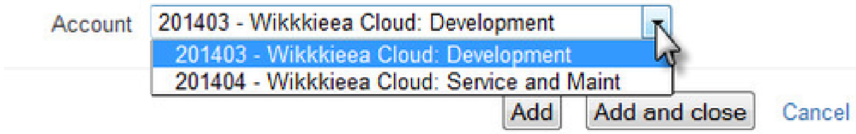
3. New *Dynamic drop-down* attribute is added with selected url for the account.



4. Click the **Required** field if you want to ensure that no worklog is without the an account.



5. The **Account** list is now displayed in all Tempo Log Work windows.

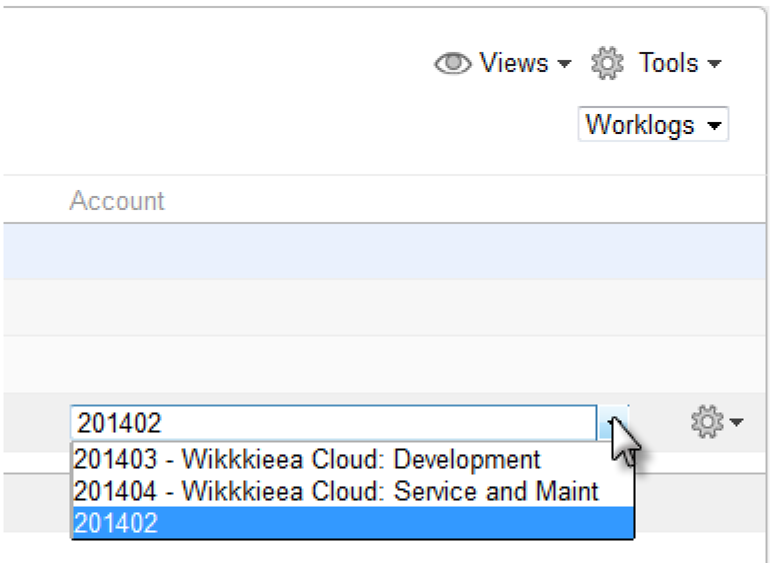


The selected Account is now connected to the worklog though another Account may be selected on the JIRA issue.

Please note that you can Move and Split worklogs to issues in another JIRA project where the selected item is not mapped. In those cases an entry is added to the Invalid worklogs page as a **W arning** in it's **Status** column.

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

To remove the **Warning** you can either Assign the Account to the project or edit the worklog in any report.



You can tell what account is invalid as the *Account Key* is only displayed in the list while the valid accounts have both *Key* and *Name.*

Worklog attributes types

his is a child page of Configuring Worklog Attributes, explaining the different worklog attribute types.

Worklog Attributes are used to add additional information on worklogs. There are currently tree types of worklog attributes in Tempo

- **Checkbox**
- **Dynamic Drop-down**
- **Input Field**
- **Account -** This option is documented on this page.
- **Input Numeric'** - Numeric values that can be summed up in the report exported excel file.

The 6th type of attribute is Script which is basically a JavaScript that is added to the page for added functionality such as interlinking two or more attributes.

On this page

In this chapter

Checkbox

This is either **True** or **False** in Tempo reports

Dynamic Drop-down

Tempo Dynamic Drop-downs are drop-down lists that are populated with an external system to add user defined properties to a worklog.

You can also use this type to create a **Select List** as explained here**:**

In Tempo 6.0.3, we released a new service for JIRA admins to create a Select List by using the Dynamic Drop- down worklog attribute type.

The administrator will simply add a new dynamic drop-down attribute, write **Type** in the **Name** field and copy this string to the **External URL** field.

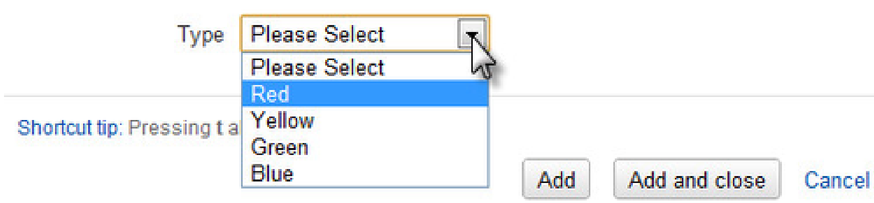
```
/rest/tempo-rest/1.0/accounts/json/getDynamicDro
pdown/|1|2|3|4/Please
Select|Red|Yellow|Green|Blue
```

Note, if you have **JIRA WAR/EAR** install you will have to add /jira in front of the string above.

```
/jira/rest/tempo-rest/1.0/accounts/json/getDynam
icDropdown/|1|2|3|4/Please
Select|Red|Yellow|Green|Blue
```

The url can not contain "%" and if you need the % in your label you can use "%25" as it will render as % in the field options.

This attribute is now included in all **Log Work windows** as seen below:



Rename the attribute and edit the values according to your needs.

See Tempo dynamic drop-downs page for more information on this subject

Input Field

Users can use this field for additional information with the worklog i.e. request number from another system.

Periods in Tempo Timesheets

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

In this chapter

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

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

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

Configuring periods and week start day

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

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

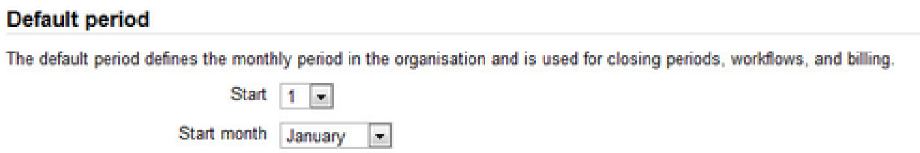
In this chapter

Period

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

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

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



2nd period

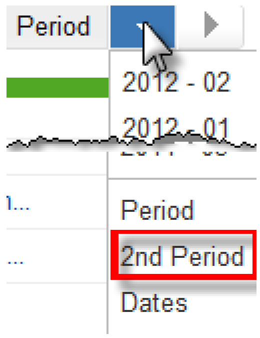
The default selection for period is **1. January** and if the selection is the same as for **Period** the **2nd Period** is not activated

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

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

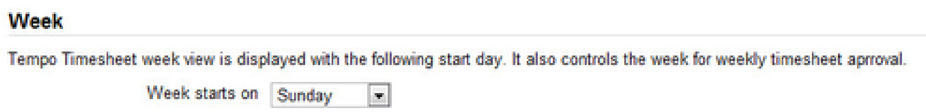
The reason for the **2nd period** option is that some users choose to have pay period different than a period used for billing customers.

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



Week Start Day

The weekday selected in the **Week starts on** is displayed as first day of the week in Tempo **Timesheet Week View**.



Period management

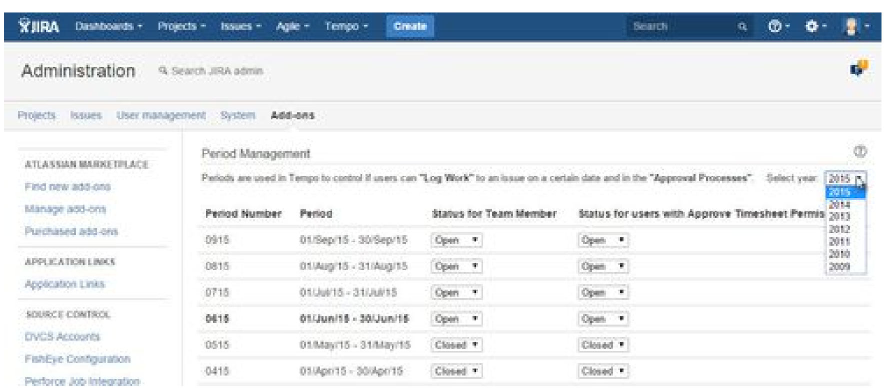
In this chapter

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

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

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

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



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

***Closed* for Tempo Team members:**

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

***Closed* for Tempo users with Approve Timesheet permisson:**

The period is usually closed for users with the Approve Timesheet permission, a *few days later* than for **team members**. This allows the users with the Approve Timesheet permission to **review** their team members' timesheets. When all timesheets have been approved, the period is closed. The **Ti**

mesheets Status is changed to **Closed** and work-logs cannot be changed in the ***Closed – Closed*** state.

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

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

Configuring Tempo scheduler

On this page

In this chapter

Video

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

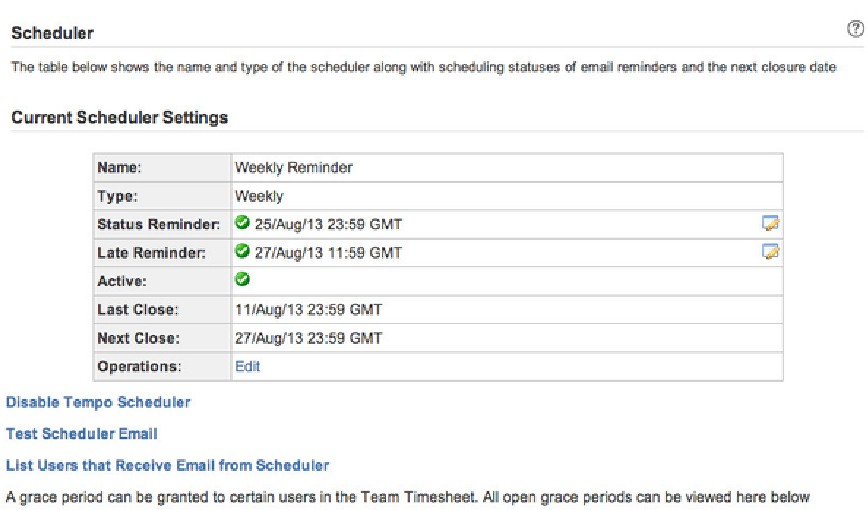
To access the Tempo Scheduler do the following:

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

Scheduled closing dates

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

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



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

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

The Edit Scheduler screen (click to enlarge)

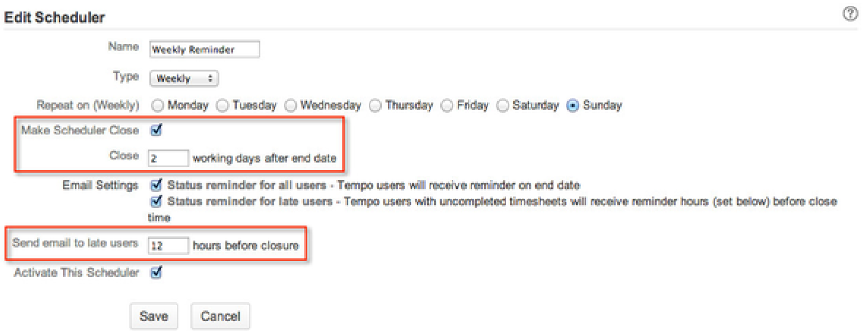
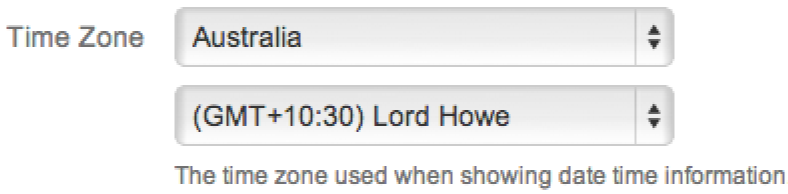


Table: Items from the screenshots above explained

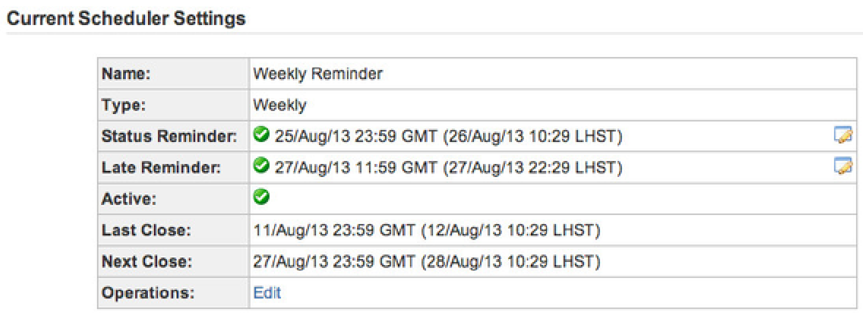
Scheduler Item	Description
Name	The name of the scheduled closure configuration.
Type	Three types can be chosen from a drop-down, e.g. **Weekly**, **Biweekly** or **Period**.
Status Reminder	In the edit mode you choose which day of the week to repeat the scheduled closure on. The Status Reminder will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

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

A different Time Zone in the JIRA User Profile

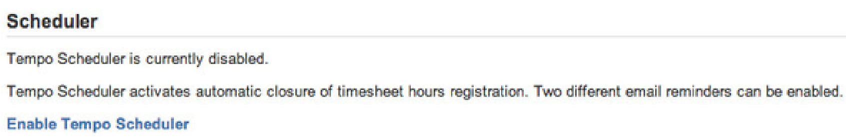


Current Scheduler Settings, displaying also the different Time Zone in the brackets



In the first screenshot above, three links are shown:

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

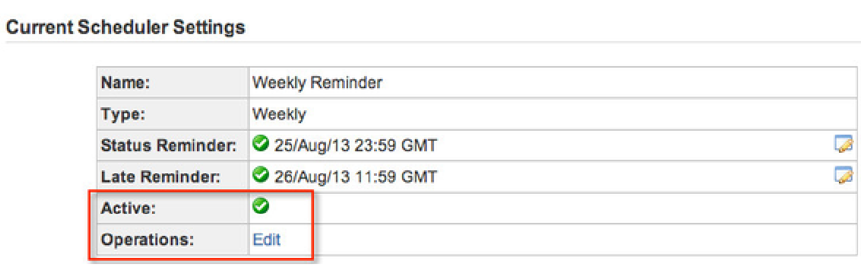


2. Sending test email from Tempo scheduler
3. **List Users that Receive Email from Scheduler** - displays a list of users receiving emails from the scheduler. The users listed should have the Tempo Time Tracking permission and in order to receive email, they need to either have logged some time or be in a worklo ad scheme with required workload.

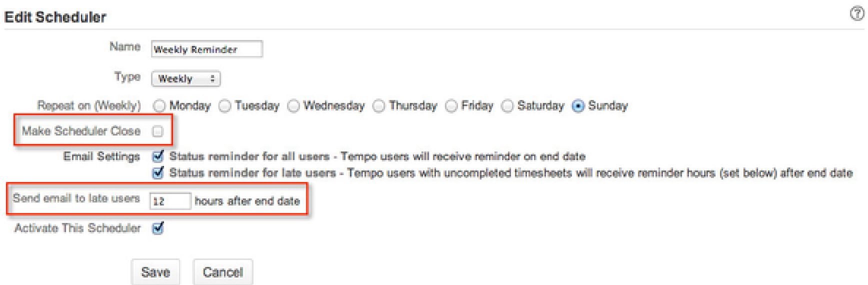
Scheduled reminders

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

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



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



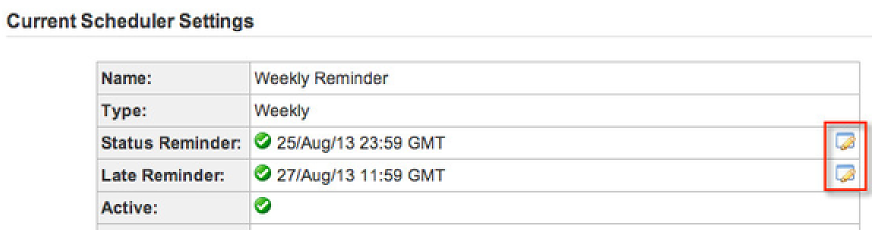
Note that **Send email to late users [ ]**, changes from **hours before closure** to **hours after end date**.

Configuring the email template in Tempo scheduler

In this chapter

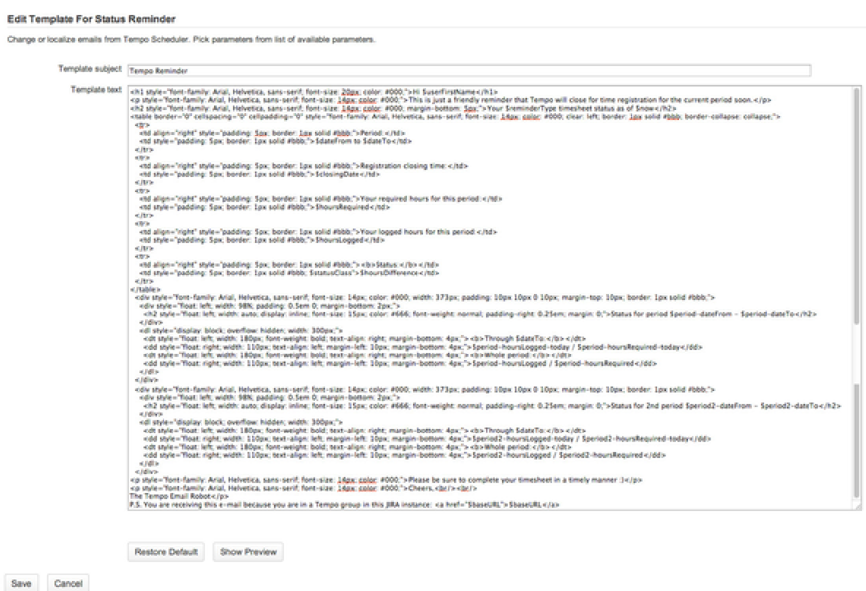
This is a child page of Configuring Tempo scheduler, explaining the Reminder email templates. They can be edited according to your needs and an edit icon is displayed for active Reminders to the end of each line.

The edit icons for active Reminders - Status and Late Reminder



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

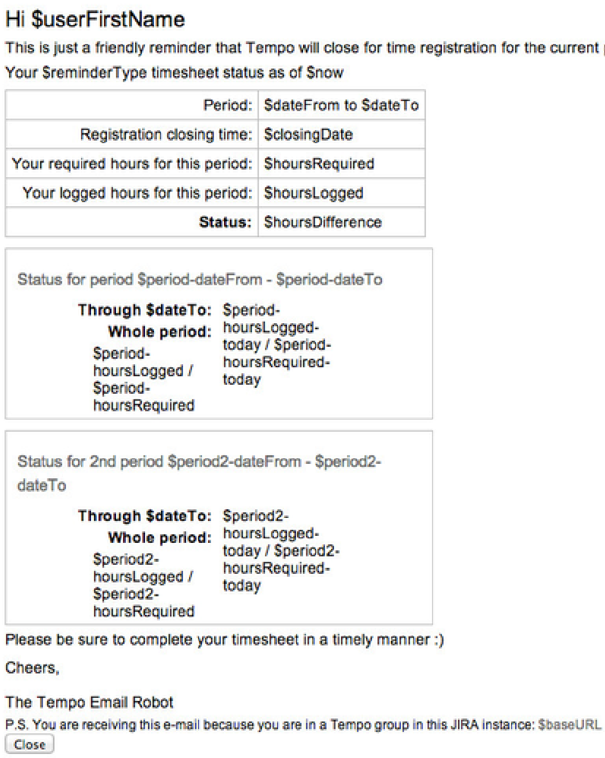
The Edit Template For Status Reminder page (click to enlarge)



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

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

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



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

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

Table: General Available parameters

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

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

Table: Available parameters for the Period

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

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

Table: Available parameters for the 2nd Period

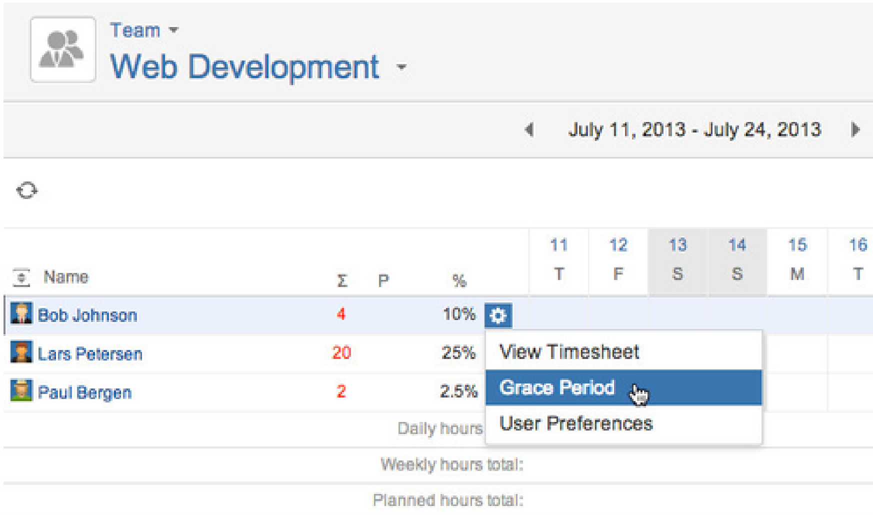
Parameter Name	Description
period2-dateFrom	Start date of the period
period2-dateTo	End date of the period
period2-hoursRequired	Users required hours for the period
period2-hoursLogged	Users logged hours for the period
period2-hoursRequired-today	Users required hours for the period from period start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

Granting a grace period

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

In this chapter

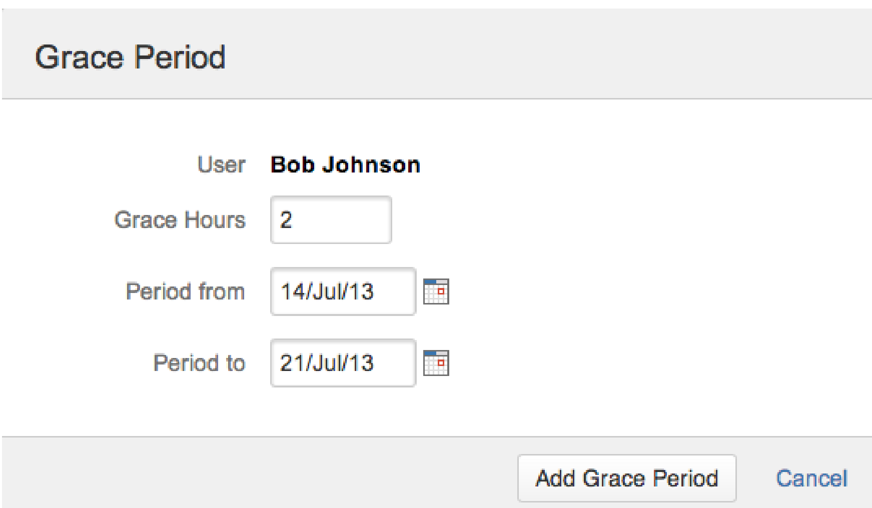
Granting a Grace Period in the Team Timesheet for Bob Johnson



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

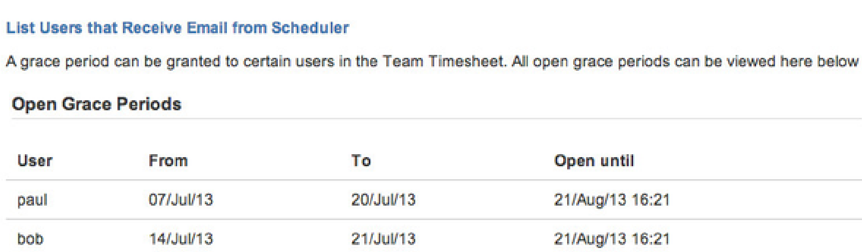
1. **Grace Hours** - The number of hours the user has to complete the timesheet.
2. Select **Period from** and **Period to** dates for the Grace Period that needs to be opened.
3. Click the **Add Grace Period** button if you are done or the **Cancel** link to close without saving.

The Grace Period window



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

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



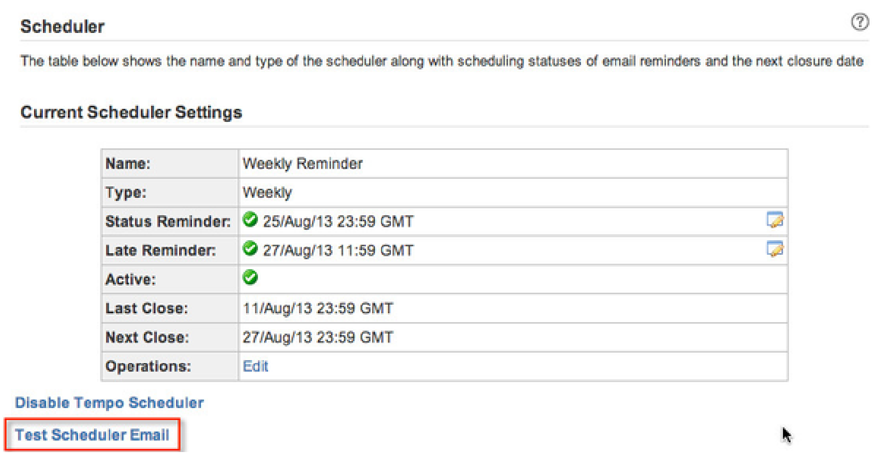
The list shows that Bob Johnson has an open grace period until July 30th 2013 at 17:52 and can add or edit worklogs from July 14th to 21st.

Sending test email from Tempo scheduler

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

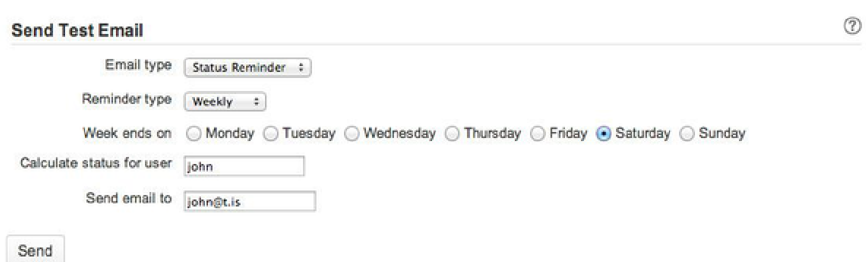
In this chapter

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



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

The Send Test Email screen



To send an email do the following:

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

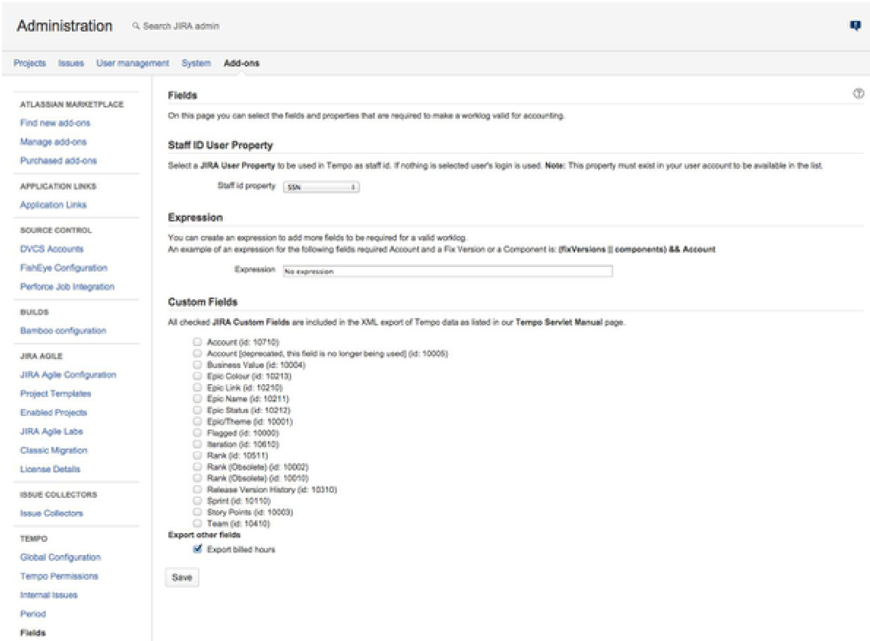
Configuring fields and properties

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

In this chapter

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

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



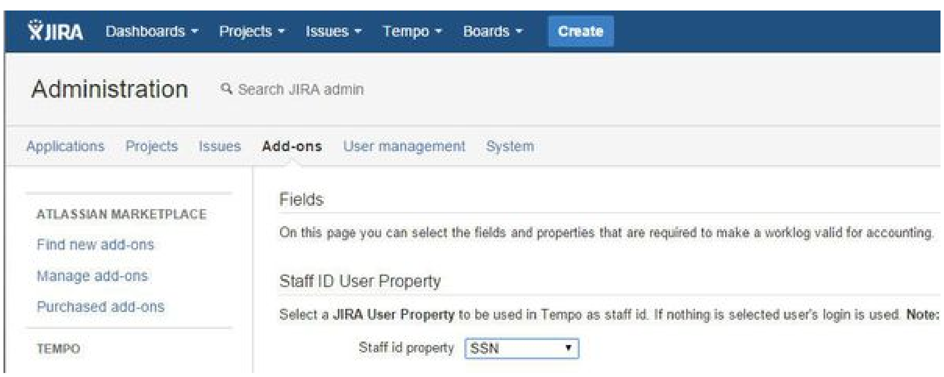
Note, You can click the *help icon* in the top right corner of the page, to open the online documentation.

Configuring staff ID property

In this chapter

Staff ID user property

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



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

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

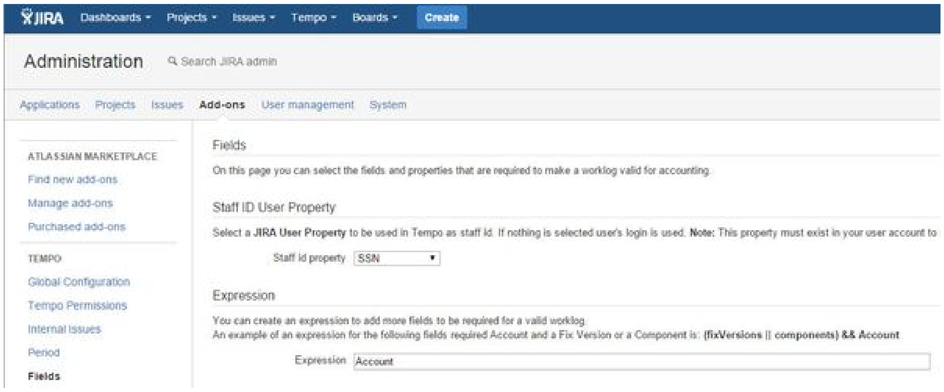
All user properties are included in the XML export as documented in the Tempo servlet manual. If no Staff ID User Property is selected the user's login name is used in the XML export.

Configuring expression for valid worklogs validation

In this chapter

Tempo Expression

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



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

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

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

Including custom fields in API export

In this chapter

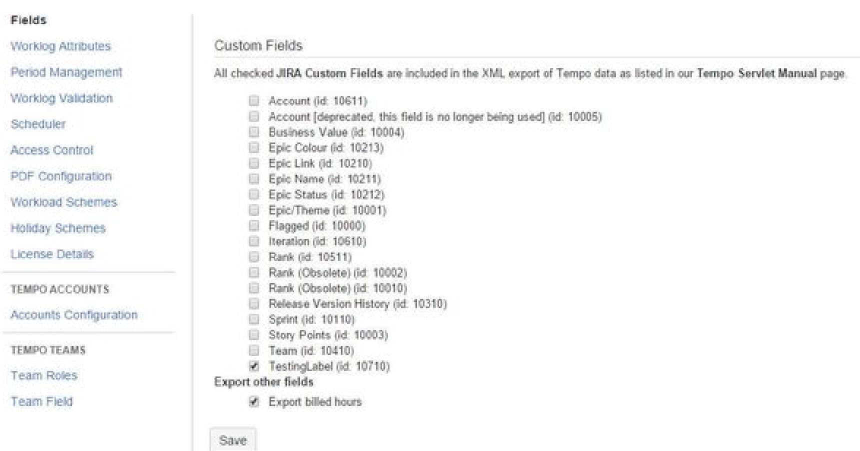
Custom Fields in Tempo export

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

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

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

Custom fields section on Fields page - click to enlarge



The field is checked by default, but doesn't extract data for the export, except the two following items in Global Configuration are checked:

- User with Approve Timesheet Permission can set billed hours
- Team member can set billed hours

Configuring and managing teams

Extract from **Tempo Teams** (plug-in) versio n: 2.x.x

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

In this chapter

Related pages

- Teams permissions
- Team Roles

Manage teams overview

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

Administering teams

This is an overview page for child pages, that explain administrative functions in Tempo Teams.

In this chapter

Required permission

JIRA Administrators permission

Table: Administrative Items related to Tempo Teams

Administrative Item	Short description
Teams permissions	This permission in currently called *Tempo Team Manager* in Tempo's global permission. It is part of the Tempo Core module and is used for managing programs and teams, along with configuring each team.
Teams Custom Field	The Tempo Team Custom Field is installed automatically with Tempo Teams, but needs to be associated to screens. The custom field makes it possible to give JIRA Issues to a Tempo team, and the team can then be used in the JIRA Issue search, like when creating filters for JIRA Agile boards.
Team roles	Explains how to add/manage team roles, that are used when adding/editing a new team member.

Teams permissions

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

This is a child page of Granting permission to users, explaining the **Manage Teams** (Tempo Team Manger) global permission.

In this chapter

Note, this permission is used by the Tempo Teams module or system plugin.

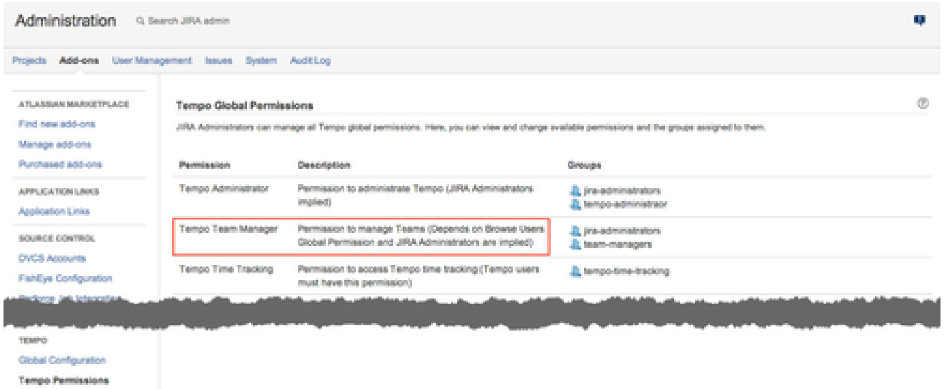
Manage Teams gives access to manage all Tempo teams. This involves managing programs and teams, along with configuring each team.

To configure Manage Teams, open the **Tempo Permissions** screen in the Tempo administration:

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Scroll down the left sidebar until you see the **Tempo** configuration group and select **Tempo Permissions**.

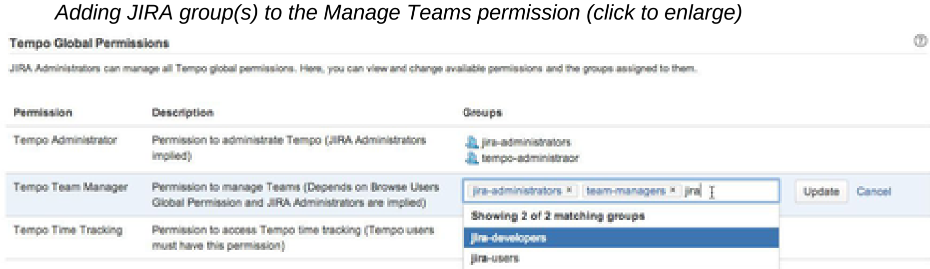
Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Tempo Permissions.**

Manage Teams (Tempo Team Manager) in Tempo Global Permissions (click to enlarge)



To edit or give users the Manage Teams permission, click on the **Groups** field as in the screenshot below and start writing the beginning of a previously created JIRA Group. To finish the editing, click on the **Update** button to save the change or the **Cancel** link to proceed without changes.

Adding JIRA group(s) to the Manage Teams permission (click to enlarge)



Note, all users with the Manage Teams permission, also require the JIRA **Browse Users** Global Permission.

Teams custom field

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

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

This custom field is also used behind the scenes in Program Planning, when giving backlog items to teams.

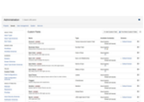
In this chapter

Required permission

JIRA Administrators permission

Procedure

1. The Custom Field is Automatically Installed



- Log in as a user with the **JIRA Administrators** Global Permission.
- Choose the **cog icon** at top right of the screen, then choose **Issues**, and select **Fields > Custom Fields** (left tabs).
  Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Custom**

Fields.

- Scroll down to the **Team** Custom Field, which by default it is not associated to any screens.
- The field is automatically installed with Tempo Teams and locked.
  In case the field needs to be renamed it can be done in Tempo's administrative section.
- It is available globally for all issue types.

2. Associating to Screens

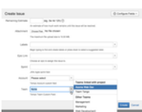
- To associate the field to screens, click on the cog-wheel menu to the right and select the **Screens** option.
- The *Associate field Team to screens* page is displayed.
- Select how you want to associate the field to screen(s) (Default Screen, Resolve Issue Screen or Workflow Screen) and click the **Update** button.

Tutorial

Adding the Team field to JIRA screens

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

3. Giving an issue to a team



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

Team field

Extract from **Tempo Teams** (plug-in) version: 2.x.x

In this chapter

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

Required permission

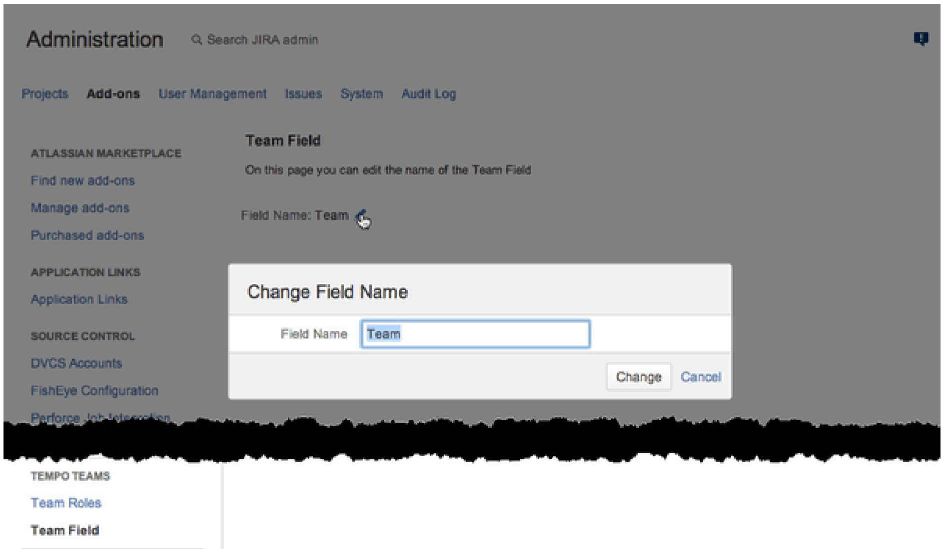
JIRA Administrators permission

Procedure

1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your

screen. Then scroll down to **Tempo Teams** administration left tabs and choose the **Team Field** option.
Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Team Field**.
3. This opens the **Team Field** screen, where you click on the *pencil icon* next to the *Field Name* to open the **Change Field Name** dialog - see screenshot below.
4. Edit the name and click the **Change** button to finish or the **Cancel** link to opt out.

The Team Field administrative screen (click to enlarge)



Team roles

Extract from **Tempo Teams** (plug-in) version: 2.x.x

Tutorial

How to create teams and team roles

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

On this page
• Add Team Role • Edit Team Role

In this chapter

Required permission

JIRA Administrators permission

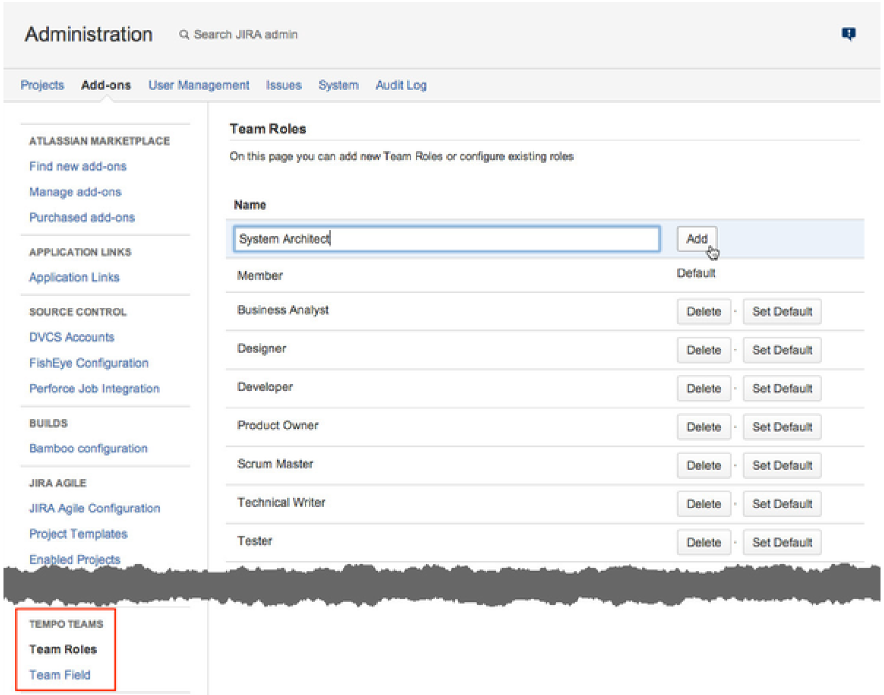
Add Team Role

Procedure

To add a new Team Role do the following:

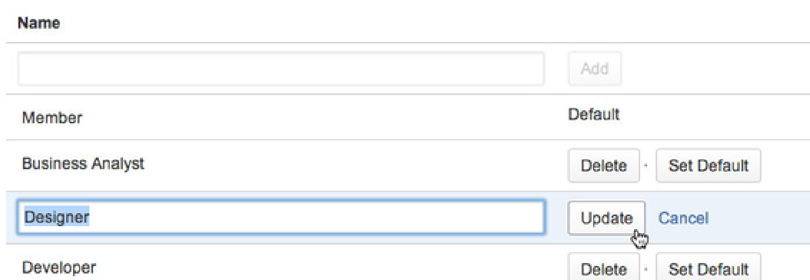
1. Log in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Then scroll down to **Tempo Teams** administration left tabs and choose the **Team Roles** option.
Tip: Use Keyboard Shortcut instead: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

The Team Roles administrative screen (click to enlarge)



Edit Team Role

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



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

Tempo team navigator

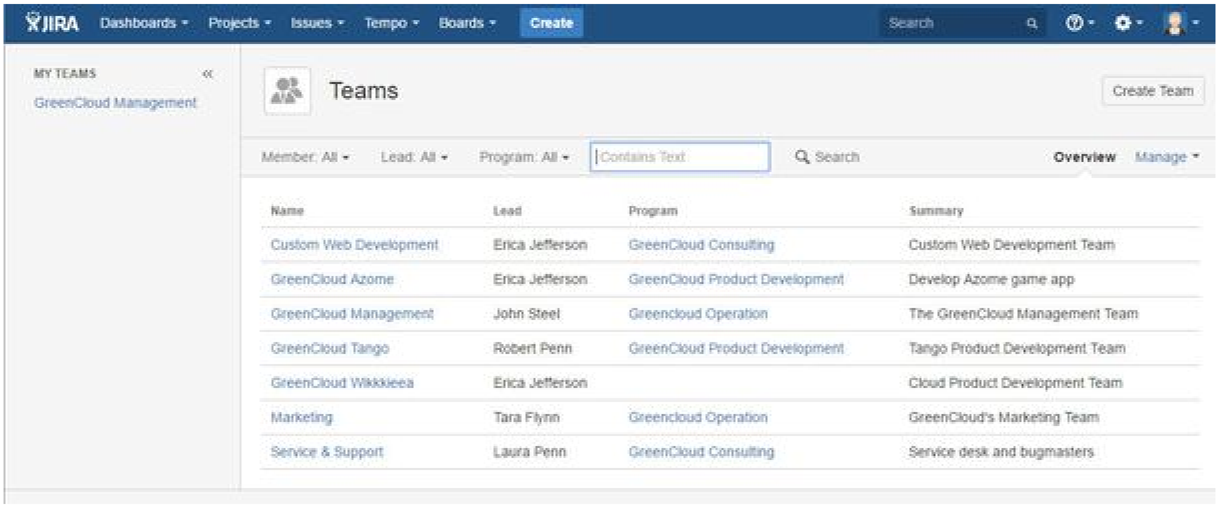
Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Accessing the teams navigator

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

The teams navigator (click to enlarge)



Filtering the list of teams

Above the list of teams, the filter menu bar contains filter attributes, such as **Member**, **Lead**, and **Program**.

Filtering by searching

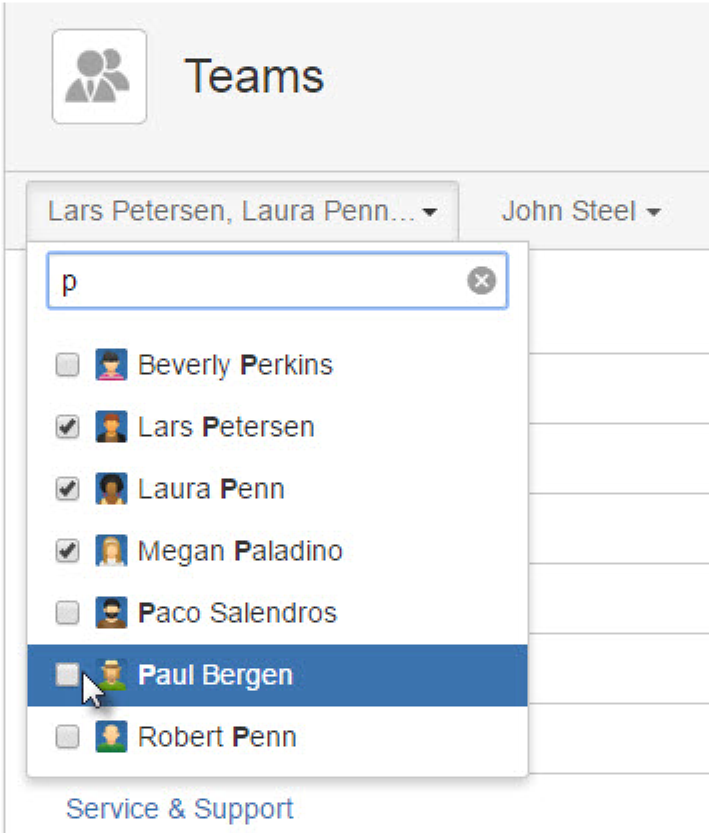
On the filter menu bar, in the search field, type text that you want to search for, and press Enter. Teams that contain the text in one or more of the fields of the team are listed.

Filtering by selecting attribute values

Complete the following steps:

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

Filter example - by Member



Related topic

Creating teams

Browsing a team

Extract from **Tempo Teams** (plug-in) version: 2.x.x

This page and its child pages, explain how to navigate (browse) one single team.

Required permission

Browse Team permission for the team

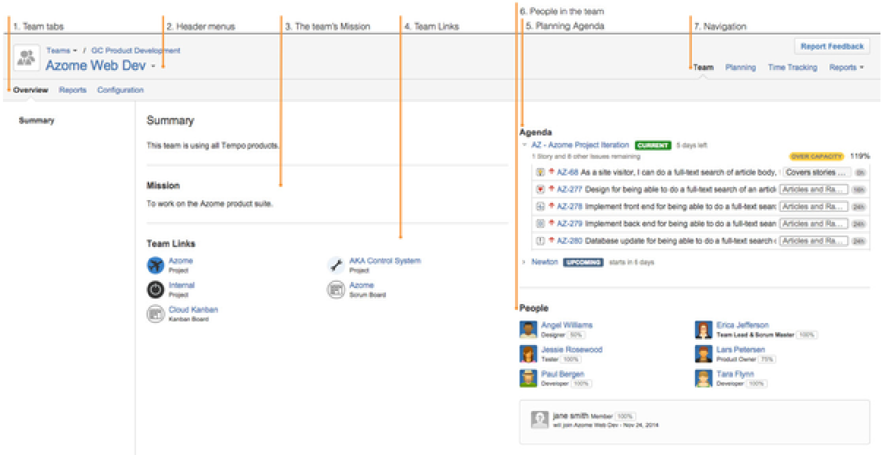
To open the overview page for a team, click on the team link in the Tempo teams navigator.

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

On this page

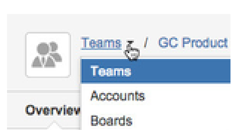
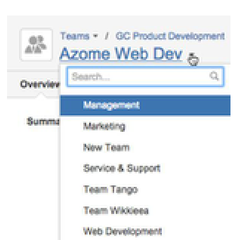
Related pages

- Teams permissions
- Team Reports



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

Table: Explaining the numbered items from the screenshot above

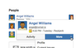
Item Number	Description
1.	Overview, Reports and Configuration tabs for the team. The Configuration tab is only available for users with the Manage Teams permission, besides users that are **Team Leads** and can configure only their own teams.
2.	There are two header menus. The first menu has three options;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

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

<table>
<tr>
<td>6.</td>
<td>

The **People** section displays all the members of the team, e.g. their name, Roles and Availability. The names are sorted alphabetically from left to right and then down the page. The lead of the team is displayed, either just as **Team Lead** or **Team Lead & other role + xx%**, with her/his title shown in bold letters.

Member pop-up



- By **hovering** over the name of a member, her/his pop-up profile is displayed, as in the left screenshot.
- Clicking on the **Activity** link in the member pop-up, opens the activity stream in the user's Profile.
- More -> **Profile**, opens the user's Profile.
- More -> **Current Issues**, opens the JIRA Issue Search with the user's current issues.
- More -> **Administer User**, opens the JIRA User Management - Users - the selected user. (This is only available for users that are JIRA Administrators).

Future members are shown in a box below the current members, and are either existing JIRA users (or current employees) or new hires (jane smith *will join Azome Web Dev - Nov 24, 2014*).

When a JIRA user has been created for the new hire, the names can be mapped together.

The Tempo Team Timesheet does only show active memberships at any given date range. This means for example that user Bob Johnson, who is joining Team Tango during April, will only be displayed in the Team Timesheet during that month.

</td>
</tr>
<tr>
<td>7.</td>
<td>

- The **Team** tab/button refreshes the current page.
- If Tempo Planner is installed a **Planning** tab/button is displayed. Click on the button to open the Planner Timeline.
- If Tempo Timesheets is installed, a **Time Tracking** tab/button is displayed to open the Team Timesheet for the team.
- The **Reports** drop-down has the same options, as detailed on the Team Reports page.

</td>
</tr>
</table>

Creating teams

Extract from **Tempo Teams** (plug-in) version: 2.x.x

Tutorial

How to create teams and team roles

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

Required permission

JIRA Administrators or **Tempo Team Manager**

Procedure

To create a team, complete the following steps:

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

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

What to do next

Configure basic team information.

Configuring basic team information

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Tutorial

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

Procedure

To configure basic team information, complete the following steps:

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the **Configure Team** area, you can edit the team name, summary description, team lead, associated program, and mission.

Tips

- Only users with **Tempo Team Manager** or **JIRA Administrators** permission can change the team lead.
- For information about programs, see the related topic in this chapter.

3. Click **Update**.

What to do next

Configure team membership

Related topic

For Tempo Planner: Grouping teams together, as a program

Configuring team membership

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Procedures

Adding team members

Extract from **Tempo Teams** (plug-in) version: 2.x.x

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Tutorial

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

Procedure

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

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

Users

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

Status

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

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

Roles

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

Availability

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

Joining

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

Leaving

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

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

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

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

What to do next

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

Related topic

Team roles

Changing the roles of team members

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Procedure

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

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

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

What to do next

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

Related topic

Team roles

Changing the availability of team members

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Procedure

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

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

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

What to do next

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

Related topic

Team roles

Changing the dates of team membership

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Procedure

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

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

What to do next

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

Deactivating membership of a team

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Procedure

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

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

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

Reactivating membership of a team

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Procedure

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

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the left column, click **Members**.
3. On the Team Members page, in the row of the user whose membership you want to reactivate, click **Edit**.
4. On the individual team member's page, the Leaving column displays the date on which the user's membership was deactivated. Click that date.
5. Delete the leaving date, or replace it with a future leaving date.
6. Click **Update**. The user's team membership status changes to ACTIVE.

What to do next

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

Removing members from a team

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

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

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Procedure

1. Go to the team configuration page (**Tempo** > TEAMS **more** > name of team > **Configuration**).
2. In the left column, click **Members**.
3. On the Team Members page, in the row of the team member whom you want to remove, check whether the right end of the row contains an **Edit** button, or the word '**via**' followed by the name of a JIRA group.
   - If the row contains an **Edit** button, the member was added individually to the team. To remove the member from the team, complete the following steps:
     a. Click **Edit**.
     b. On the individual team member's page, in the rightmost column, click **Delete**, and in the Delete Membership window, click **Delete** again.
        If the team member was added multiple times to the team (for example, for different periods or with different roles), repeat this step for every membership row on the page.
     c. You can return to the list of all team members by clicking **Members** in the left column.
   - If the row contains the word '**via**' followed by the name of a JIRA group, the member was added to the team as part of the JIRA group. To remove the member from the team, complete one of the following tasks:
     - Remove the user from the JIRA group (see Atlassian's documentation)

       or
     - Remove the JIRA group from the team, by completing the following steps:
       a. On the Team Members page, in the **Groups** section, in the row of the JIRA group that you want to delete, click **Delete**.
       b. In the Delete Member window, click **Delete**.

Related topic

Deactivating membership of a team

Switching type of working week

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

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

across all of the teams that the team member is a member of.

Procedure

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

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

Related topics

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

Switching set of public holidays

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

One of the following permission types:

- JIRA Administrators (if Tempo Timesheets, Tempo Planner, Tempo Folio, or Tempo Books is installed)
- Tempo Administrator (if Tempo Timesheets is installed)

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

Procedure

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

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

Related topics

- Switching types of working weeks
- Switching sets of public holidays (alternative method)
- Specifying public holidays

Linking teams to projects and JIRA Agile boards

Extract from **Tempo Teams** (plug-in) version: 2.x.x

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

Required permission

JIRA Administrators or **Tempo Team Manager** or **Team Lead**

Tutorial

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

Procedure

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

1. Go to the team configuration page by completing the following steps:
   a. On the main menu bar, click **Tempo**.
   b. On the **Tempo** menu, go to the **Teams** section, and click **more**.
   c. On the Teams page, click the team that you want to link to a project or board.
   d. On the individual team page, click **Configuration**.
2. In the left column, click **Links**.
3. On the Team Links page, select the board or project that you want to link to the team, and click **+Link**.

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

Configuring and managing accounts

Tutorial

Account management with Tempo Accounts

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

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

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

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

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

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

Status	Description
OPEN	This is the default status for newly created or imported accounts. The status can also be set by manual configuration, given the account has previously had another status.
CLOSED	Accounts can only get this status by manual configuration.

In this chapter

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

A few notes:

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

Administering accounts

Extract from **Tempo Accounts** (plug-in) ver sion: 2.x.x

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

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

Function	Description
Accounts Custom Field	The field is installed automatically with Tempo Accounts and is mandatory for activating accounts. Accounts add different dimension or business intelligence to Tempo data.
Accounts Permissions	The Manage Accounts permission, gives access to work with all accounts that have been or need to be created. This involves being able to create an account manually, import and export accounts and configuring an account.
Accounts configuration	Allows you to configure properties for accounts. The property currently available is: *Clear Account value when issue is moved between projects*. Select the property if you do not want accounts to be included in the target project when moving an issue between JIRA projects.

Accounts custom field

Extract from **Tempo Accounts** (plug-in) ver sion: 2.x.x

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

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

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

By activating accounts, Accounts JQL Functions become available.

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

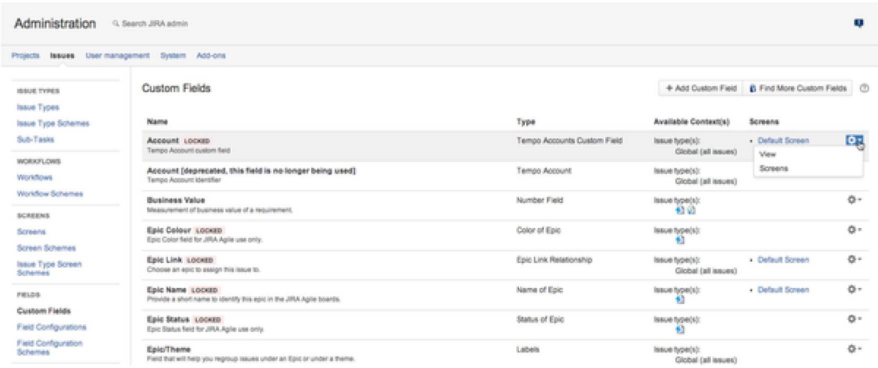
The field is also used in Tempo Books to produce revenue calculations for hours and expenses logged on an account.

Related pages

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

Associating to Screens

Screenshot: JIRA Custom Fields page - click to enlarge



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

Accounts permissions

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

This page explains the **Manage Accounts** (Tempo Account Manager) global permission. Manage Accounts gives access to work with all accounts that have been or need to be created.

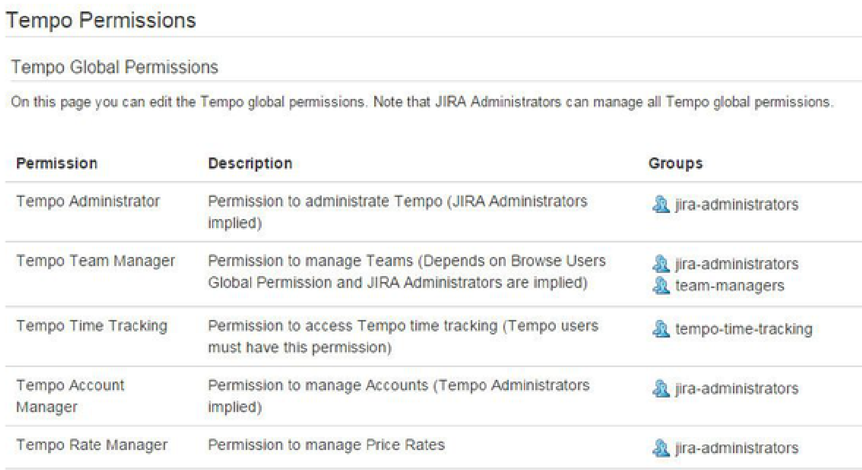
To configure who has this permission, go to **Tempo Permissions** in the Tempo administration:

Related pages

- Manage Rates

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

Tempo Account Manager in Tempo Global Permissions (click to enlarge)



Tempo Permissions

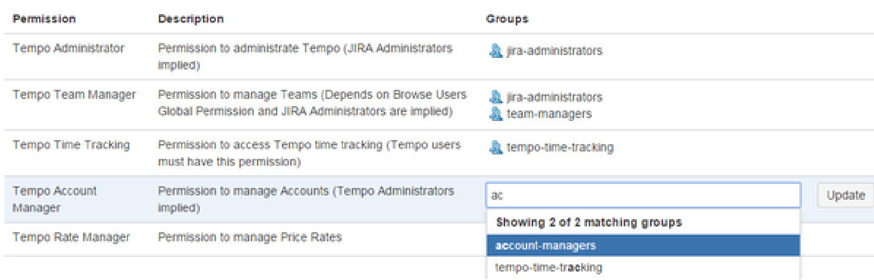
Tempo Global Permissions

On this page you can edit the Tempo global permissions. Note that JIRA Administrators can manage all Tempo global permissions.

Permission	Description	Groups
Tempo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	jira-administrators
Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied)	jira-administrators team-managers
Tempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	tempo-time-tracking
Tempo Account Manager	Permission to manage Accounts (Tempo Administrators implied)	jira-administrators
Tempo Rate Manager	Permission to manage Price Rates	jira-administrators

To edit or give users the Manage Accounts permission, click on the **Groups** field as in the screenshot below and start writing the beginning of a previously created JIRA Group. To finish the editing, click on the **Update** button to save the change or the **Cancel** link to proceed without changes.

Adding JIRA group(s) to Tempo Account Manager



Permission	Description	Groups
Tempo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	jira-administrators
Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied)	jira-administrators team-managers
Tempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	tempo-time-tracking
Tempo Account Manager	Permission to manage Accounts (Tempo Administrators implied)	ac
Tempo Rate Manager	Permission to manage Price Rates	

The Manage Accounts permission is automatically granted to Tempo Administrators.

Accounts configuration

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

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

To configure a property, open the Accounts Configuration by:

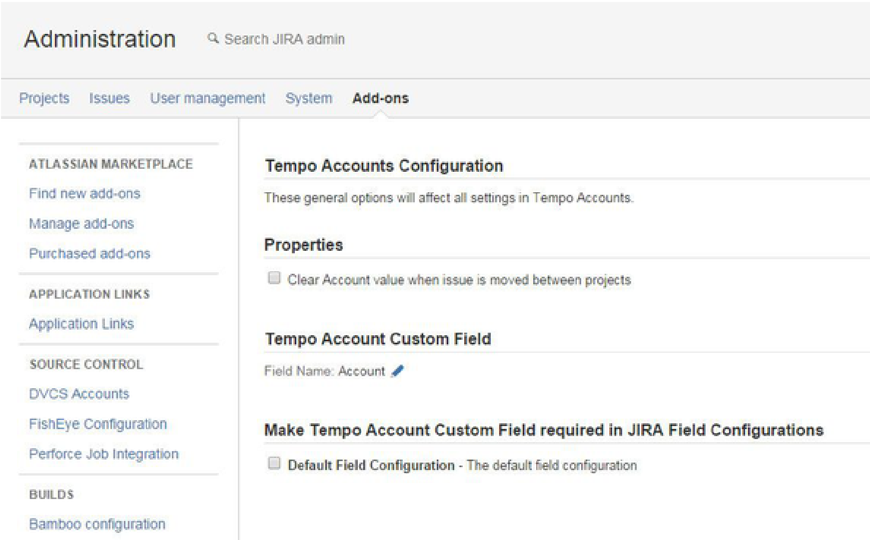
1. Logging in as a user with the **JIRA Administrators** Global Permission.
2. Select **Add-ons** from the **Administration** menu (cog icon:) at the top right of your screen. Scroll down the left sidebar until you see the **Tempo Accounts** configuration group and select **Accounts Configuration**.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

The Tempo Accounts Configuration screen (click to enlarge)

On this page

Related pages

- Administer Accounts
- Accounts Custom Field



Clear Accounts from JIRA Issues

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

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

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

Tempo Account Custom Field Name

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

Make Account Required

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

Tempo accounts navigator

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

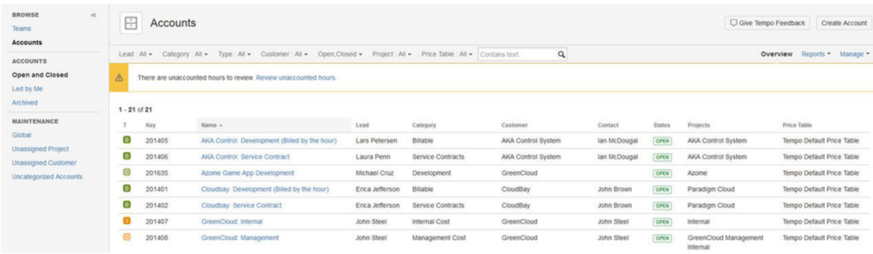
A Tempo account can represent a customer project, a cost center, or a contract. You can link JIRA issues to accounts and categorize work by, for example, type of work, customer, or project. In the accounts navigator, you can view a list of all accounts that you have access to. You can search and filter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

On this page

Accessing the accounts navigator

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

The accounts navigator (click to enlarge)



Creating an account

Required permission

Manage Accounts permission

Procedure

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

Related topic

Creating an account

Filtering the list of accounts

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

Filtering by searching

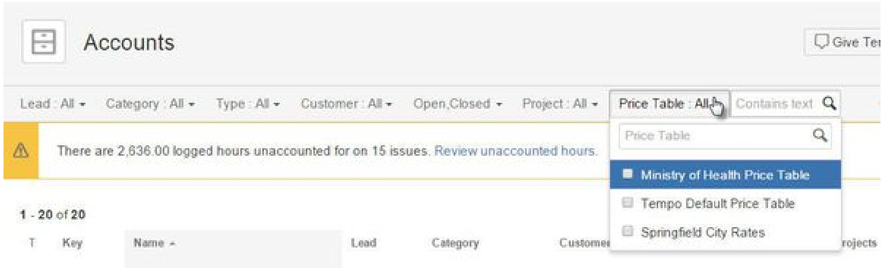
On the filter menu bar, in the search field, type text that you want to search for, and press Enter. Accounts that contain the text in one or more of the fields of the account are listed. The Status and Projects (Links) fields are not searched.

Filtering by selecting attribute values

Complete the following steps:

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

Filter example - by Price Table



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

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

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

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

Selecting predefined filters

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

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

Related topics

- Accounts Permissions
- Configuring an account

Sorting the list of accounts

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

Reviewing a list of unaccounted hours

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

Related topic

In the Tempo Timesheets documentation: Unaccounted hours

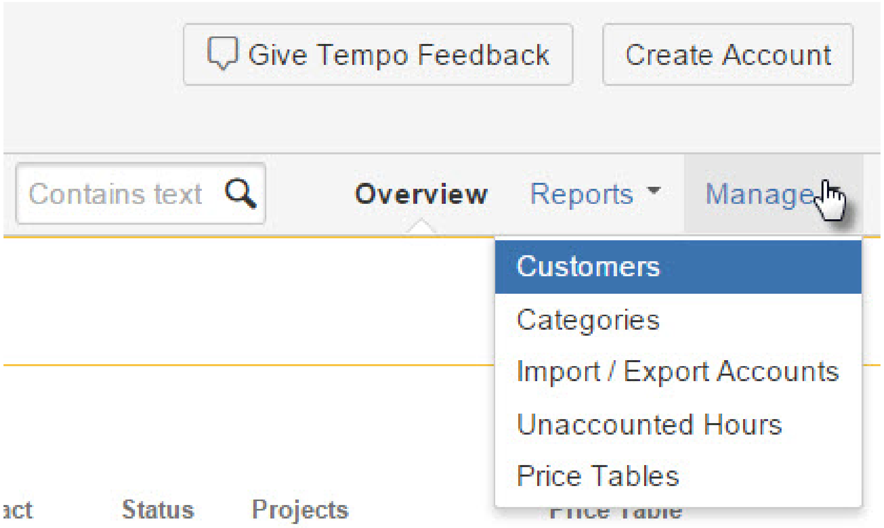
Viewing the list of customers

Required permission

Manage Accounts permission

Procedure

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



Related topics

- Accounts Permissions
- Managing customers

Viewing lists of account and expense categories

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

Required permission

Manage Accounts permission

Procedure

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

Related topic

Categorizing accounts

Viewing hourly rates

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

Required permission

Manage Accounts permission

Procedure

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

Importing and exporting account data

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

Required permission

Manage Accounts permission

Procedure

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

Related topic

Import and Export

Exporting worklogs as a PDF file

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

Required permission

Approve Timesheet permission

Procedure

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

Creating accounts

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

In this chapter

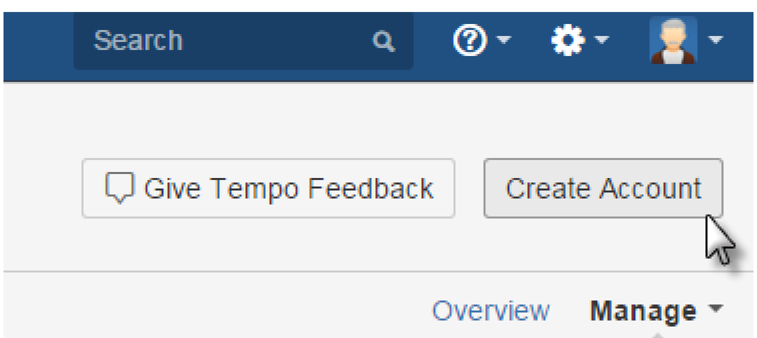
Related pages
• Accounts Custom Field • Accounts JQL Functions

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

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

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

The Create Account button in the Accounts Navigator



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

The Create Account dialog (click to enlarge)

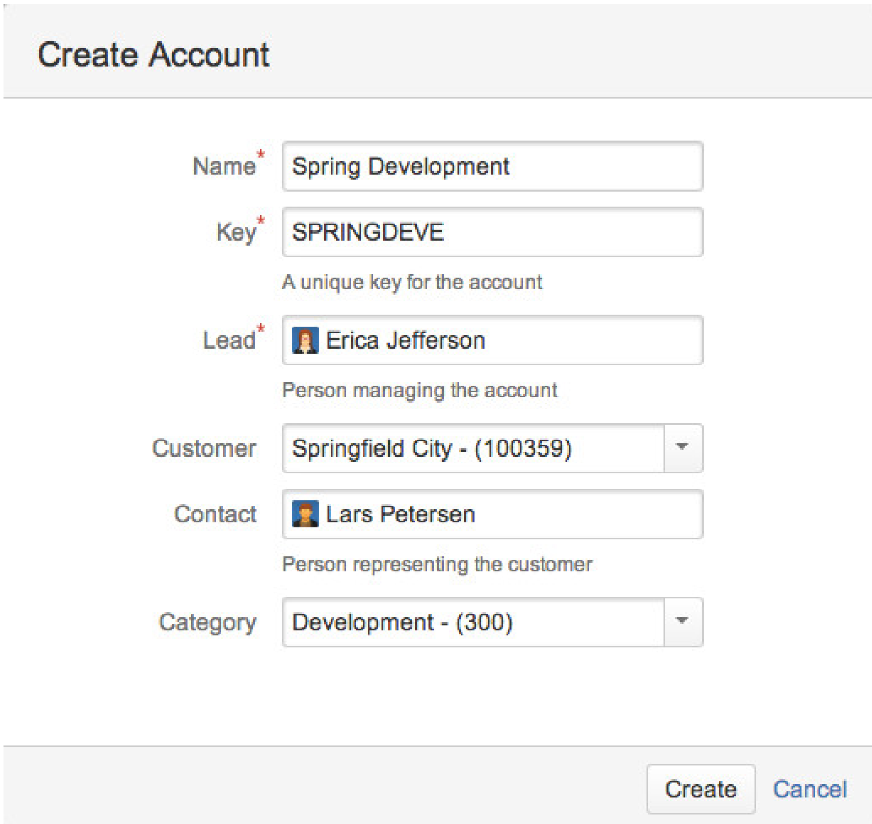


Table: The Create Account dialog options explained

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

Contact	This is someone who represents the customer. Depending on the purpose of the account, for internal or external use, this person may of may not be a JIRA user.
Category	Select a category from the drop-down menu to associate with the account. The category is a way to create a division for an Account/Customer like *Development* or *Marketing*.

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

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

Configuring accounts

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

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

On this page

In this chapter

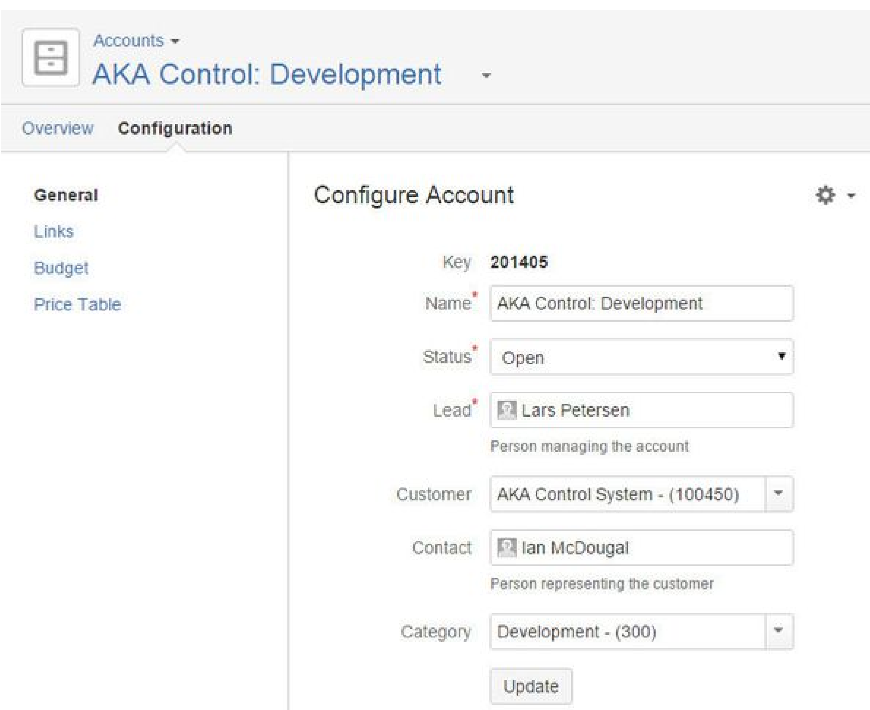
Related pages

- Accounts Custom Field
- Accounts JQL Functions

Configuring an account

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

The Configure Account screen (click to enlarge)



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

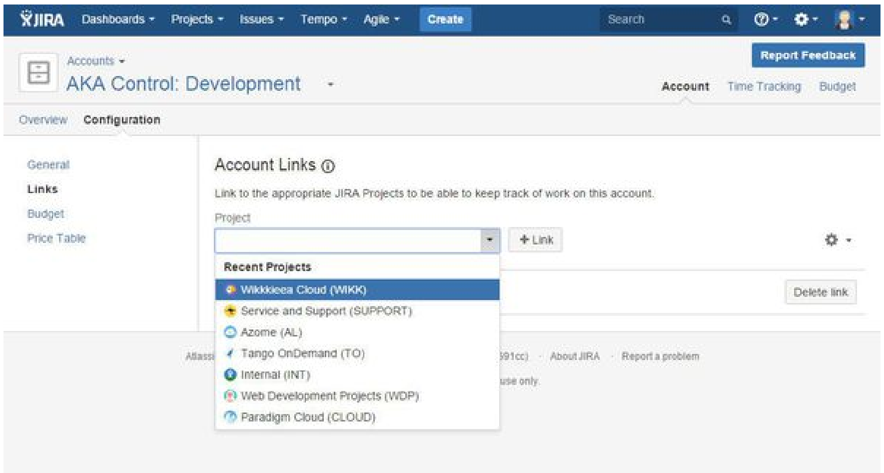
The available values for the Account Status are, *Open*, *Closed* or *Archived*. The default value for a newly created account is *Open*.

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

Linking account to JIRA projects

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

Configuring Account Links (click to enlarge)



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

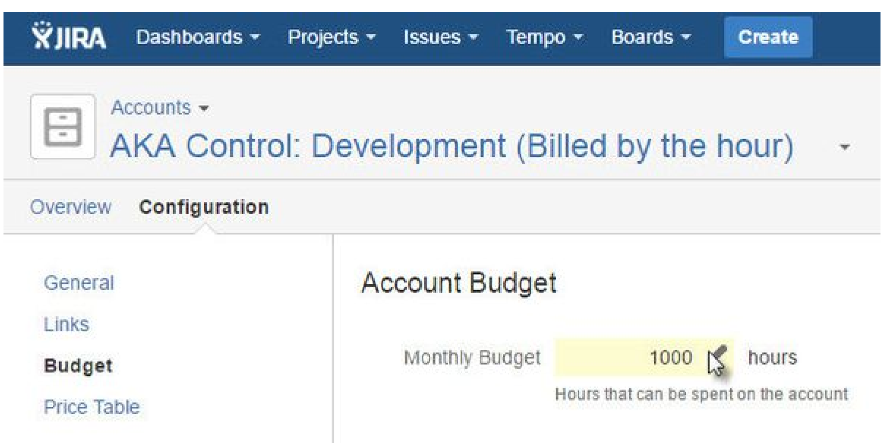
Related topic

Linking accounts to projects

Adding a monthly budget to an account

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

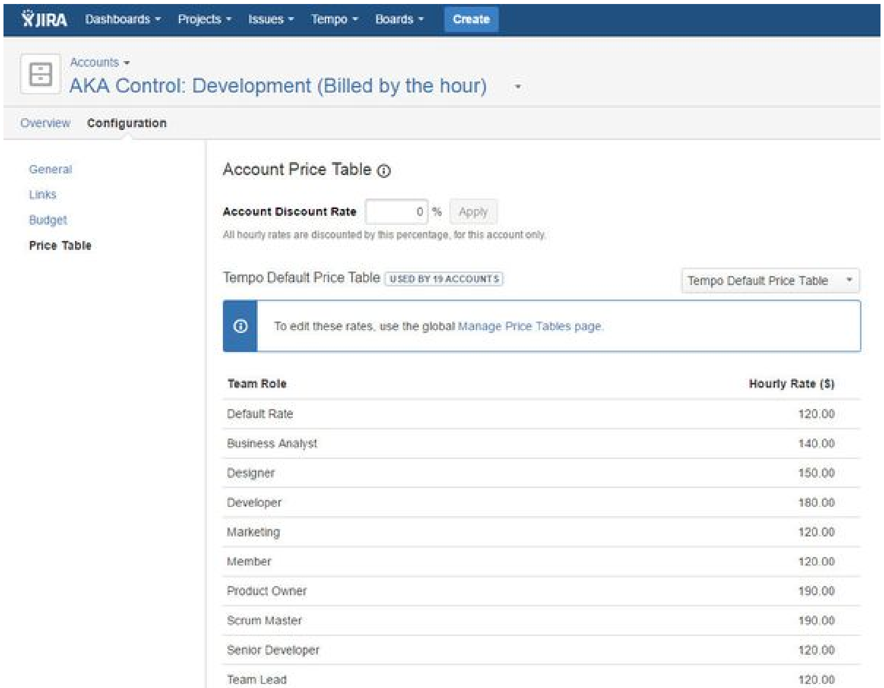
Tempo Accounts Budget configuration page



Configuring price table

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

Tempo Account Price Table



Linking accounts to projects

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

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

On this page

In this chapter

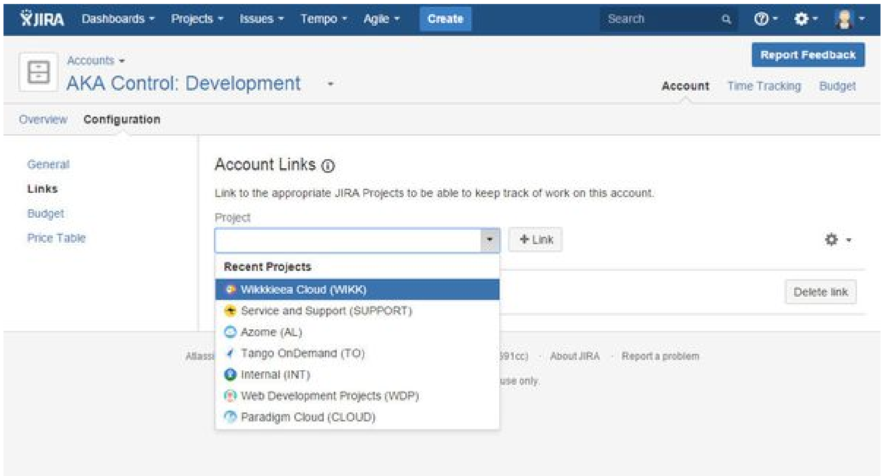
Link on Create

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

In Accounts Configuration

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

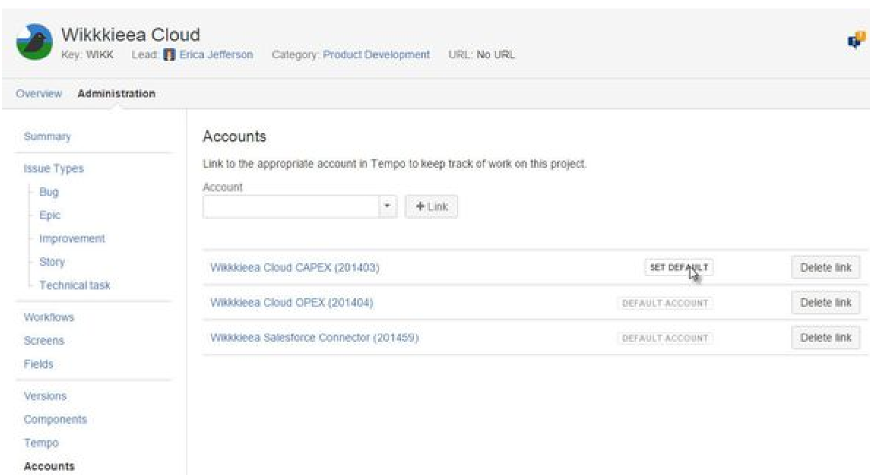
The Links page in Accounts Configuration



In Project Administration

Users with Manage Accounts permission and are in the Administration Role for the selected project can open the Accounts page in project administration.

Accounts section in Project Administration



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

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

Managing customers

Tutorial

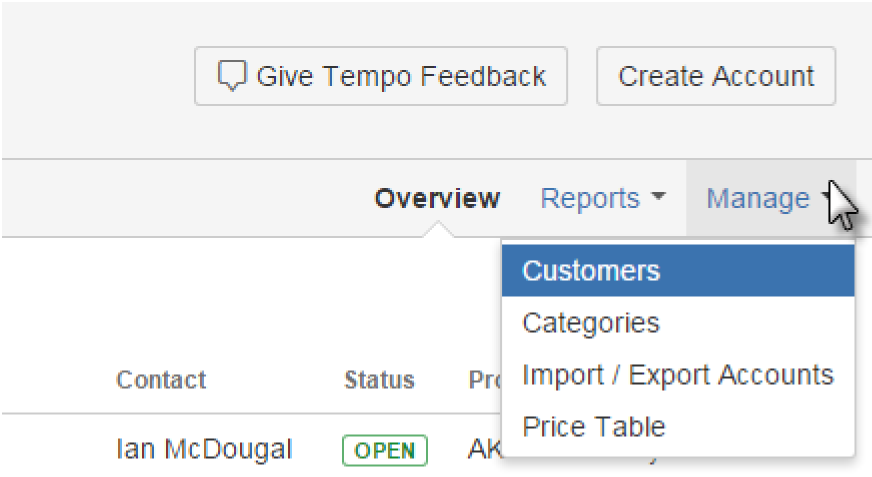
Customer overview

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

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

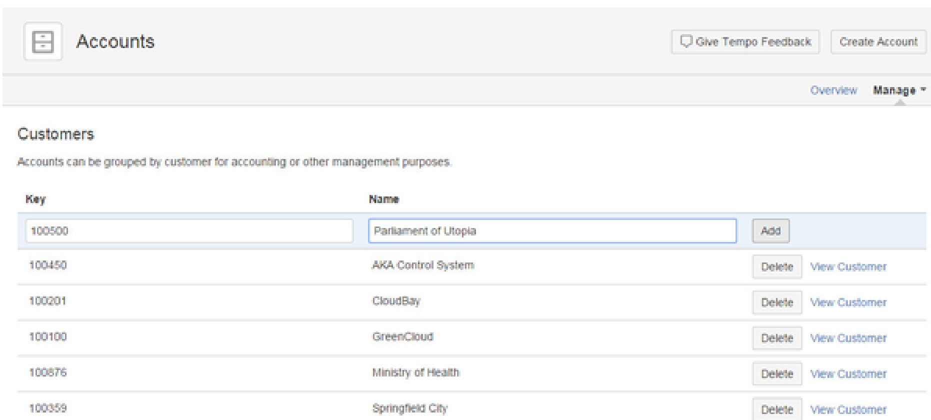
In this chapter

Accessing Customers in Tempo Accounts Navigator



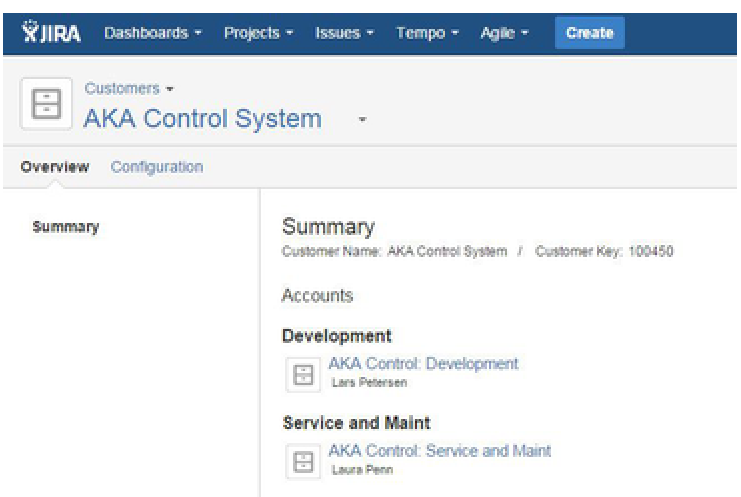
This opens the Customer screen as in the screenshots below. To add a Customer, type in a unique *Key* and *Name* for it and click the *Add* button at the end of the line.

Adding a new customer for accounts (click to enlarge)



All Customers in the system are listed alphabetically by *Name*. You can view the Customer Overview page by clicking the *View Customer* link. The Configuration option is only used in Tempo Books.

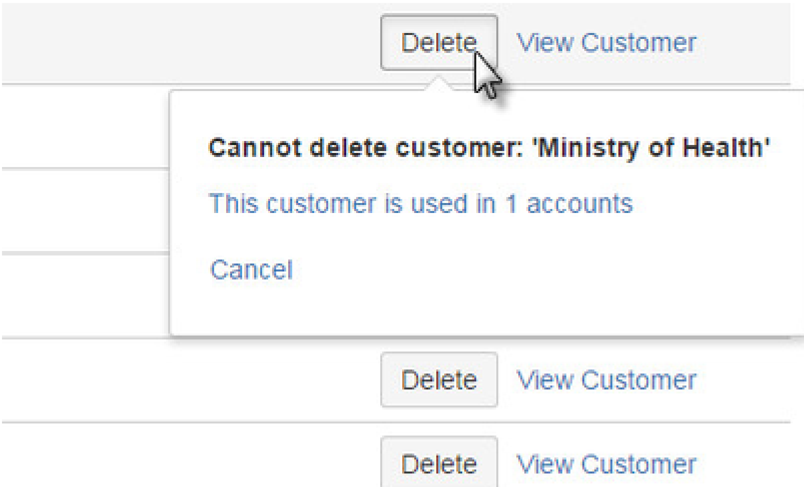
Overview page for the AKA Control System customer



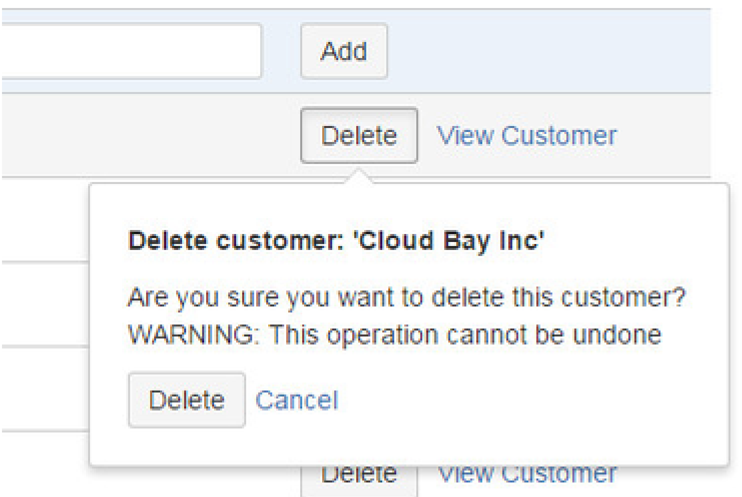
To delete a Customer, click on the **Delete** button for the selected customer to open the Delete

Customer dialog. If the customer is linked to an account a message is displayed and you can´t delete until the customer has been removed from the account.

Confirmation dialog for an active customer



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



Categorizing accounts

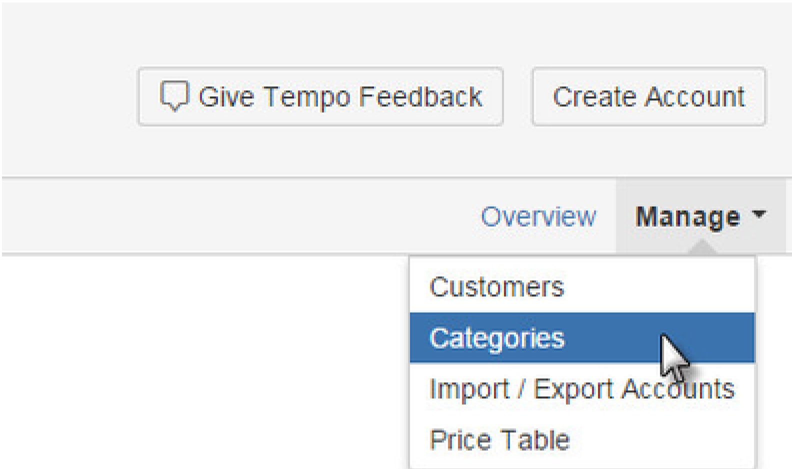
Extract from **Tempo Accounts** (plug-in) version: 2.x.x

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

In this chapter

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

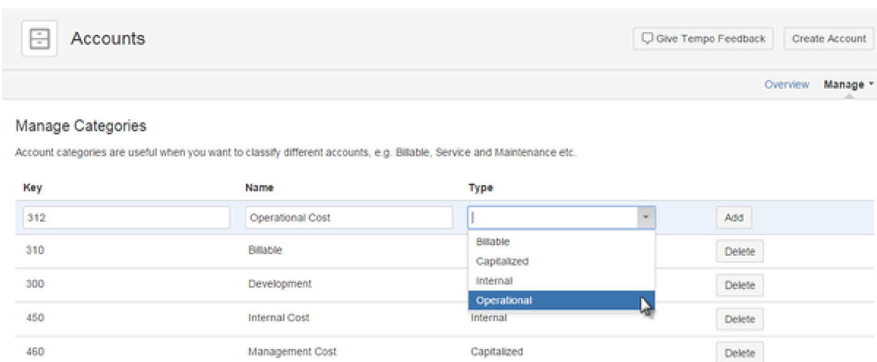
Accessing categories in the Tempo Accounts Navigator



Adding categories

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

Adding a new customer for accounts (click to enlarge)



Fields

Key

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

Name

All categories in the system are listed alphabetically by name.

Type

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

Type	Description

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

Deleting categories

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

Importing and exporting accounts

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

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

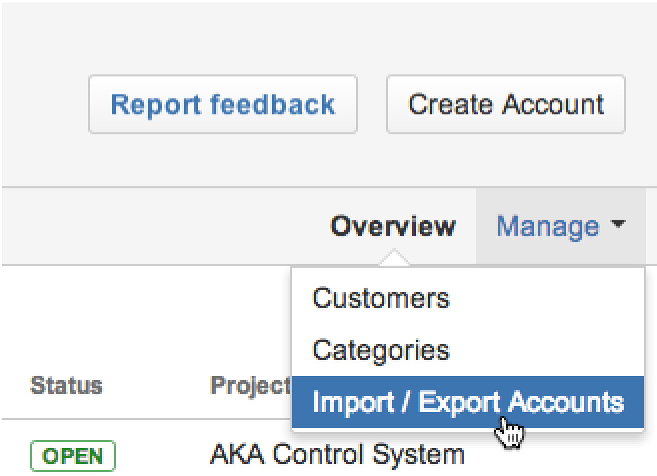
The Accounts Custom Field is installed automatically with Tempo Accounts, but may need to be configured further, depending on how you want to associate the account information.

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

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

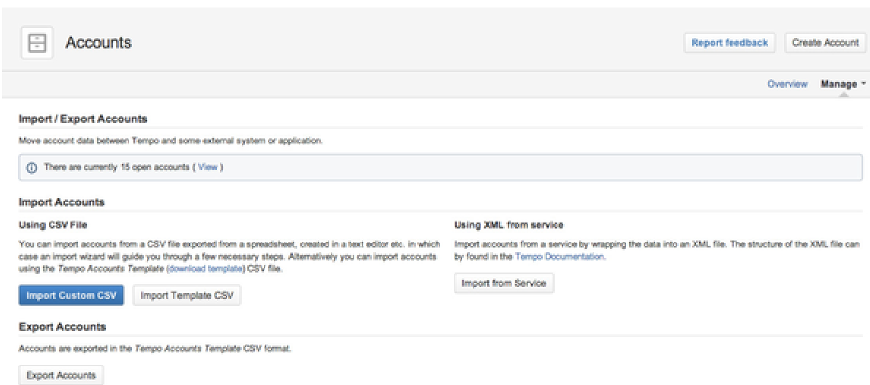
The Import / Export Accounts option in the Manage drop-down menu

In this chapter



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

The Import / Export Accounts screen (click to enlarge)



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

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

Account status

Extract from **Tempo Accounts** (plug-in) version: 2.x.x

Account Statuses

In this chapter

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

Status	Usage
OPEN	Active Account • Displayed in issue view • Displayed in Account field in linked project issues • Search-able in Tempo Timesheets Account Search • All worklogs displayed in Tempo Timesheets reports • All worklogs included in the API export file

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

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

Change Account Status in Importing

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

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

Change Account Status in Importing

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

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

Worklog date validation

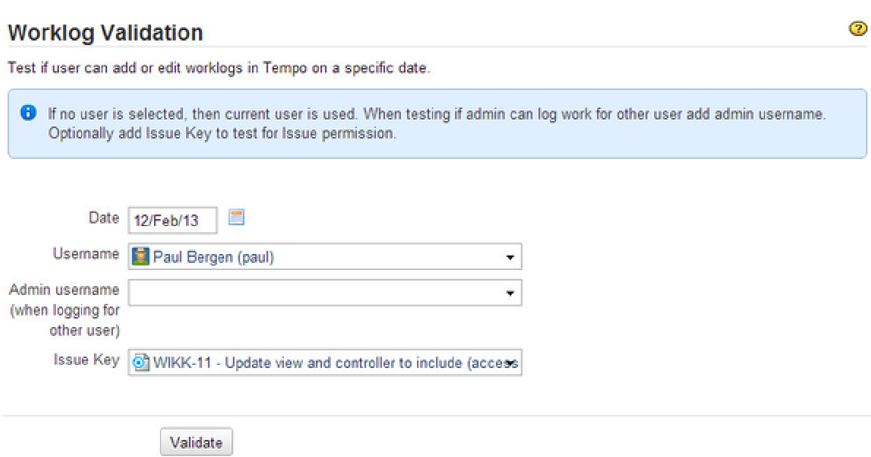
To access **Worklog Validation** take the following steps:

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

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

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

The Worklog Validation page:

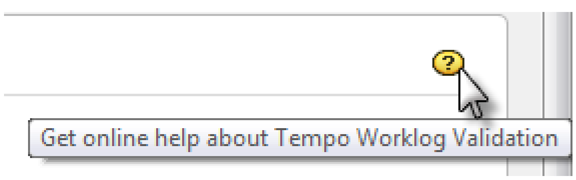


Fill in the fields on the Worklog Validation page and click the **Validate** button to get the result.

The validation result for a user:

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

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



Access control

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

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

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

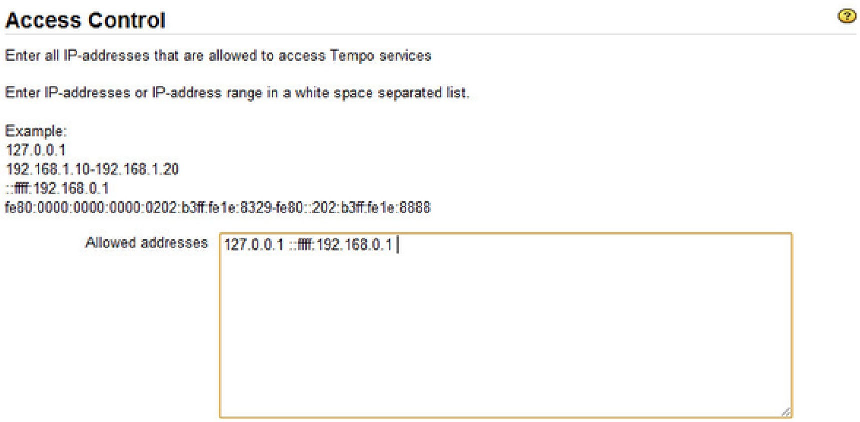
The Tempo services are:

- **GetWorklogs**: Gets all worklogs for a given period, returns data in specified format (XML, Excel or test data).
- **UpdateWorklogs**: Updates worklogs with external information (external ID & external

Related pages

- Tempo Servlets Manual

hours).
- **WorklogReport**: Returns a worklog report in XML that can be used as input for a reporting tool.
- **BillingKeyList**: Returns a list of available billing keys and is used when creating reports.
- **HolidayList**: Returns a list of registered holidays to be used when calculating required hours in an external system.



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

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

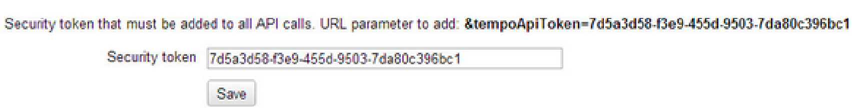
Tempo API Security Token

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

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

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

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



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

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

Viewing Tempo license and version details

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

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

Required permission

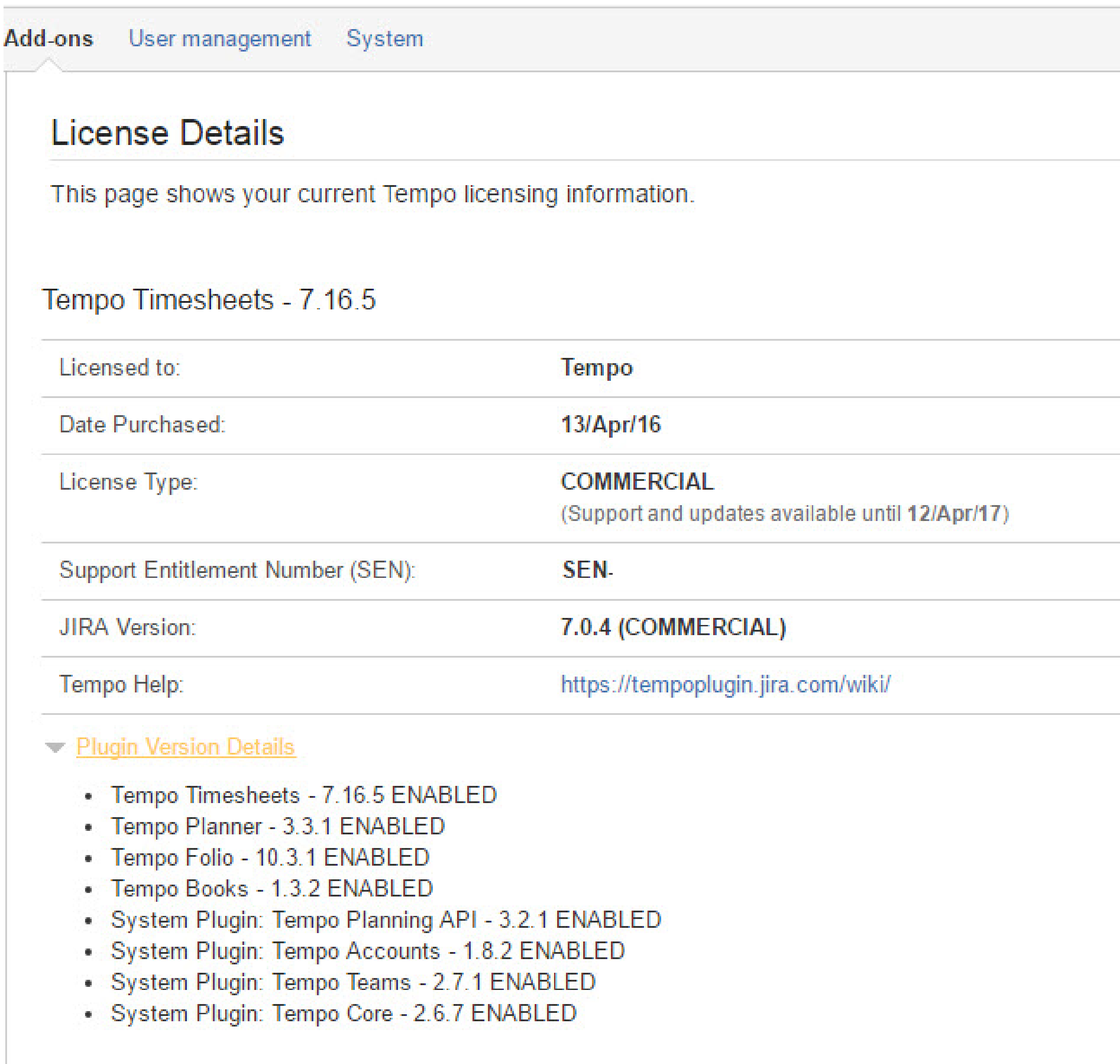
One of the following permission types:

- JIRA Administrators
- Tempo Administrator

Procedure

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

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



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

Tempo system plugins

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

In this chapter

Tempo Core

Tempo permissions are managed in the Tempo Core system plugin. Workload and holiday schemes are used to calculate required workload and availability.

Tempo Teams

Permissions to view worklogs owned by team members are managed in the Tempo Teams system plugin. The **Teams** custom field is automatically created when Tempo Teams is installed, and it is used to give issues to a team. As a team lead you can perform the following tasks:

- Associate projects and agile boards that your team is currently working on so that team members can access all team information in the common team space
- View all hours that are logged by your team members in Team Timesheets
- Set your utilization target for customer accounts and keep track of how your team is investing its time
- Define team roles for all members of the team and set a price rate for each role

Tempo Accounts

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

Tempo Planning API

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

Tempo Core system plug-in

Extract from **Tempo Core** version: 3.x.x

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

In this chapter

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

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

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

Tempo Teams system plug-in

Extract from **Tempo Teams** version: 2.x.x

Getting Started

Tempo Teams 101

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

Manage teams

Creating teams

Team Configuration

Team Permissions

Program of teams

Other Resources

Glossary

Administer Teams

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

Teams permissions

Teams Custom Field

Team roles

Using Tempo Teams

Tempo teams navigator

Browsing a team

Team Reports

Teams JQL Functions

Tempo Accounts system plug-in

Extract from **Tempo Accounts** version: 2.x.x

Getting Started

Tempo Accounts 101

Using Tempo Accounts

Tempo Accounts Navigator

Browsing an Account

Accounts JQL Functions

Displaying Account in JIRA issue

Administer Accounts

Accounts Custom Field

Accounts Permissions

Accounts configuration

Other Resources

Tempo Accounts FAQ

Glossary

Tempo Planning API system plug-in

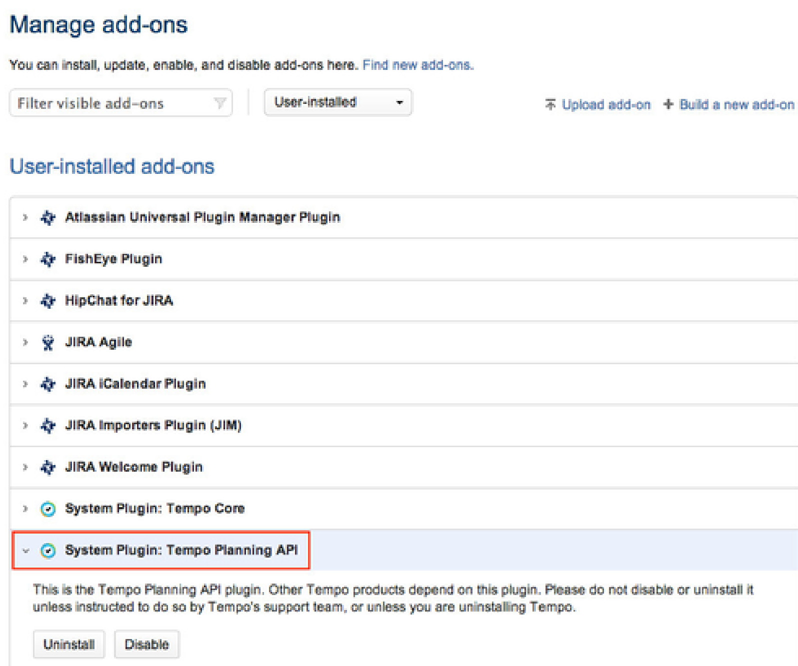
Key items

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

The perspective role: JIRA Administrators

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

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



API for Tempo Timesheets

Tempo REST API

In this chapter

Tempo REST API is for developers who want to integrate with Tempo add-ons. The REST API is a standard interface for interacting with the Tempo modules. Use the REST API browser built into JIRA to browse the services provided by the Tempo REST API.

Links to API documentation pages available in Tempo Timesheets is listed in Timesheets REST API page and all Tempo API is listed on the Tempo REST API´s page.

For more detailed information on REST see JIRA REST APIs documentation.

Related pages

- Tempo REST API´s
- Timesheets REST API

Tempo servlets API

Integrating two systems is a fairly complex process; change in one system must be reflected in the other. Tempo, however, allows users to easily change worklogs, whether for something as simple as a spelling correction or the modification of a date, or for more involved tasks, such as deleting a worklog.

The blog Integrating Atlassian JIRA using Tempo Plugin explains how worklogs entered in JIRA can be integrated with an external system.

The Tempo services are designed as a **Machine-to-Machine** communication and are usually not used by normal users. The services provide **ALL** worklogs regardless of permissions. The services should therefore be used with care and should only be open to a limited number of people/computers. JIRA administrators control access to the Tempo services with IP address filtering

This page explains in details the available functions in Tempo services API and how they can be used in your company.

For more information and examples check out the Tempo Servlets Manual page.

Please comment on that page if something is not clear enough or you have some questions on this subject.

PDF version of documentation

API Guide (PDF, 2 Aug 2016)

Tempo API guide

In this chapter

Related pages

Tempo REST API´s

Tempo Servlets API

Integrating two systems is a fairly complex process; change in one system must be reflected in the other. Tempo, however, allows users to easily change worklogs, whether for something as simple as a spelling correction or the modification of a date, or for more involved tasks, such as deleting a worklog.

The blog Integrating Atlassian JIRA using Tempo Plugin explains how worklogs entered in JIRA can be integrated with an external system.

The Tempo services are designed as a **Machine-to-Machine** communication and are usually not used by normal users. The services provide **ALL** worklogs regardless of permissions. The services should therefore be used with care and should only be open to a limited number of people/computers. JIRA administrators control access to the Tempo services with IP address filtering

This page explains in details the available functions in Tempo services API and how they can be used in your company.

For more information and examples check out the Tempo Servlets Manual page.

Please comment on that page if something is not clear enough or you have some questions on this subject.

Tempo dynamic drop-downs

Worklog Attributes

Worklog attributes are used to add additional information on worklogs. There are currently four types of worklog attributes in Tempo. Accounts can be selected as an worklog attribute.

- Checkbox
- Input field

- Dynamic Dropdown
- Input Numeric

The fifth "type" of attribute is **Script** which is basically a JavaScript that is added to the page for added functionality such as interlinking two or more attributes.

All worklog attributes created in Tempo admin are global on the JIRA instance and displayed on all worklog windows. Our roadmap includes a request to have an attribute on a JIRA project level and we'll respond to that later.

Worklog attributes can be edited, added and removed from the report view in Tempo by selecting **A ttribute** from the filter list.

All reports in Tempo can be exported to Excel from the **Views** tab. The Excel file has two worksheets, Overview and Worklogs. Each attribute has it's own column in the worklog worksheet.

Tempo Dynamic Drop-downs

Tempo Dynamic Drop-downs are drop-down lists that are populated with an external system to add user defined properties to a worklog.

Example:

- External **accounts** are used in Tempo and expenditure items (billing keys or account numbers) are added to projects with Tempo Accounts.
- Accounts hold detail information such as **operations**.
  - Example: Account is a client (Acme Inc.), operations to choose from on a given account can be for example: "Service", "Development" etc.
- When an employee writes hours on a task, a Tempo Dynamic Drop-down can be configured to do a lookup on the external system with the billing key as a parameter and only show the operations for the given expenditure item (billing key)
  - **NB.** This assumes of course that the external system has the lookup function defined and the data is returned in standard format as described below.

External Service - JSONP web service

The external service must return the data to the Tempo Dynamic Drop-down as simple key-value list in **JSONP** format. Example:

On this page

In this chapter

Related pages

Tempo REST API´s

Example JSONP JavaScript with callback named "fn"

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

fn is the name of the JSONP callback function, **values**, **key** and **value** are the names of the variables that the drop-down consumer understands.

Please note that this is **JSONP**, not ordinary **JSON**! The difference lies in the fact that JSONP is required for cross-domain communications.

The main thing regarding JSONP is the **callback function**. The URL to the JSONP service is of the form **url?callback=?**. The question mark is replaced with a generated function name at run-time (this is the **fn** in our example). This means that the service that returns the JSONP code must take a **callback** parameter and use the callback value as the function name.

Also note that the **callback** parameter is added implicitly by the JSONP library - you should **NOT** a dd **callback** to your URL when you define the dynamic drop-down URL.

Here is an excellent explanation of how JSONP works: http://www.ibm.com/developerworks /library/wa-aj-jsonp1/.

Request Parameters

Tempo Dynamic Drop-downs can take parameters. The name of the parameter is added to the URL in brackets { }. There are currently three types of parameters:

- **Custom field parameter**. The name of the custom field is used to find the value which is used as a parameter.
  - **Example**: http(s)://www.acme.com/jsonp/operations/{Billing key}
- **Current value of another dynamic drop-down**. The worklog attribute key is used to get the value of another drop-down which is used as a parameter.
  - **Example**: http(s)://www.acme.com/jsonp/operations/{*_BillingKey_*}
- **Issue key**. The issue key is used as a parameter.
  - **Example**: http(s)://www.acme.com/jsonp/operations/{IssueKey}
- **User parameter**. The selected user (worklog author) is used as a parameter.
  - **Example**: http(s)://www.acme.com/jsonp/operations/{author}

Scripts

JavaScripts can be added to the page to create for example inter-dependency between fields. This is done by using the "SCRIPT" attribute type.

> Script is not available for JIRA Cloud users

Here is an example of two scripts that create inter-dependency between Tempo drop-downs. Please note that these scripts are just **examples** created for a customer. Your needs will most likely be different but we hope that the examples will serve as a template for your scripts.

The first script is triggered whenever the **Billing Key** drop-down is changed. The change triggers the associated **Activity** drop-down to be populated with the data just selected in the **Billing Key** field.

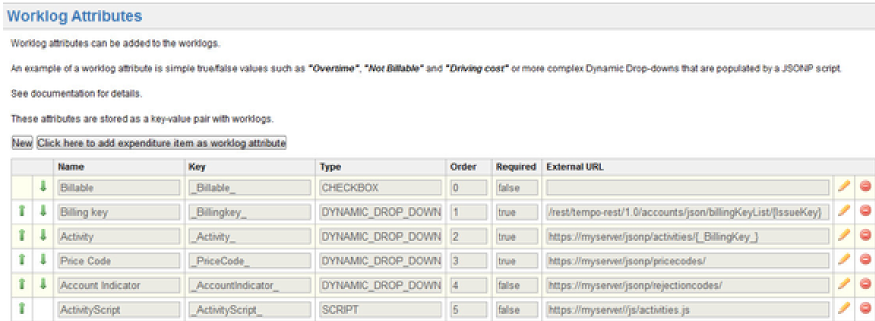
The second script is executed when the **Activity** drop-down is changed. This script assumes that the **Activity** value is of the form **activityId|priceCodeId|accountIndicatorId**. The value just selected as **Activity** is used to select the default values for **Price Code** and **Account Indicator**.

Example JavaScript that creates inter-dependency between fields

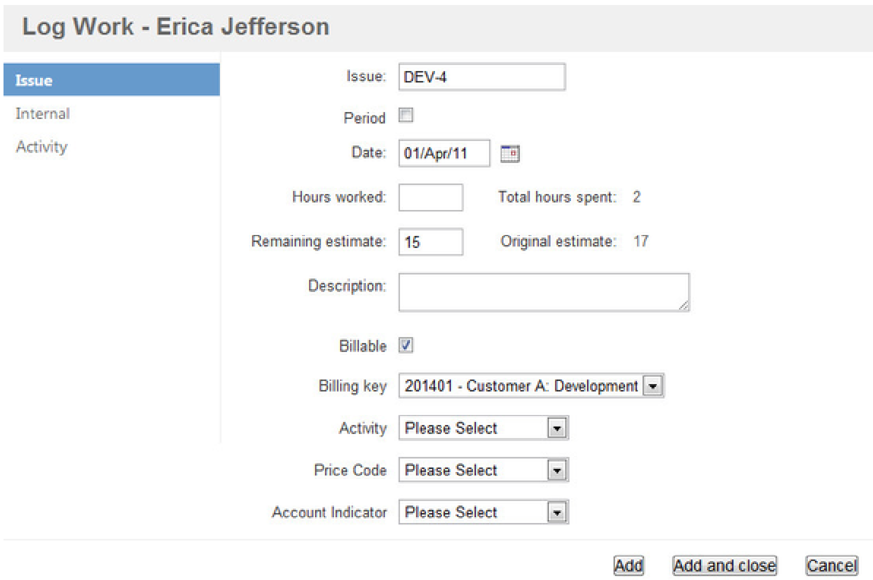
```
jQuery(document).ready(function() {

jQuery('.tempoDynamicDropDown[id$="_BillingKey_"
]').live('change', function() {
    var elementId = jQuery(this).attr('id');
    var activityDropDownId =
elementId.replace('_BillingKey_', '_Activity_');
    var activityDropDown = jQuery('#' +
activityDropDownId);
    var externalURL =
jQuery(activityDropDown).attr('externalURL');
    var currentBillingKey = jQuery(this).val();
    var idx = externalURL.lastIndexOf('/');
    var newExternalURL =
externalURL.substring(0, idx + 1) +
currentBillingKey;
    jQuery(activityDropDown).attr('externalURL',
newExternalURL);

jQuery(activityDropDown).empty().populateDynamic
Dropdown(null);
  });

jQuery('.tempoDynamicDropDown[id$="_Activity_"]'
).live('change', function() {
    var elementId = '#' +
jQuery(this).attr("id");
    var value = jQuery(elementId).val();
    var attrPrefix = elementId.substring(0,
elementId.indexOf('_'));
    if (value != null) {
      var split = value.split('|');
      jQuery(attrPrefix +
'_PriceCode_').val(split[1]);
      jQuery(attrPrefix +
'_AccountIndicator_').val(split[2]);
    }
  });
});
```

Worklog Attributes Example

Here is an example of the configuration with 1 checkbox, 4 drop-downs and one script. The **Billing Key** drop-down is dependent on the **IssueKey** and the **Activity** drop-down is dependent on the value selected in the **Billing Key** drop-down.



And here is how it is displayed in the **Log work** window



Select List

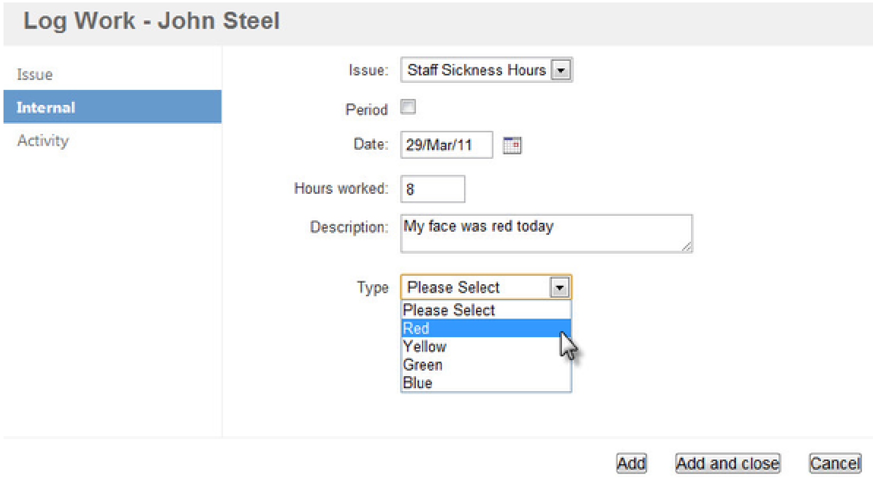
In Tempo 6.0.3, we released a new service for admins to create a select list by using the dynamic drop down worklog attribute type.

The administrator will simply add a new dynamic dropdown with a URL like this:

- **For JIRA standalone install**
  - /rest/tempo-rest/1.0/accounts/json/getDynamicDropdown/|1|2|3|4/Please Select|Red|Yellow|Green|Blue
- **For JIRA war/ear install**
  - /jira/rest/tempo-rest/1.0/accounts/json/getDynamicDropdown/|1|2|3|4/Please Select|Red|Yellow|Green|Blue

The **getDynamicDropdown** service takes two path parameters: **values** and **labels**, separated with a pipe ("|").
This is configured in the Tempo configuration for Worklog Attributes

The given list will be displayed in all **Log Work** windows where the user can select a value for each worklog.
In this example the values are Red, Yellow, Green and Blue



Please note that the lists have to be of the same length. If you remove Green and Blue from the example above then you also need to remove 3 and 4 from the ID list.

Please note: The drop-downs are not populated until an issue has been entered. This is necessary since the request parameters are usually based on the issue.

Tempo servlet manual

Tempo servlets manual

Integrating two systems is a fairly complex process; change in one system must be reflected in the other. Tempo, however, allows users to easily change worklogs, whether for something as simple as a spelling correction or the modification of a date, or for more involved tasks, such as deleting a worklog.

The blog Integrating Atlassian JIRA using Tempo Plugin explains how worklogs entered in JIRA can be integrated with an external system.

The Tempo services are designed as a **Machine-to-Machine** communication and are usually not used by normal users. The services provide **ALL** worklogs regardless of permissions. The services should therefore be used with care and should only be open to a limited number of people/computers. JIRA administrators control access to the Tempo services with IP address filtering.

This page explains in details the available functions in Tempo services API and how they can be used in your company. Please comment on this page if something is not clear enough or you have some questions on this subject.

On this page

In this chapter

Related pages

Tempo REST API´s

GetWorklogs

Gets all worklogs for a given period, returns data on specified format (XML, Excel or test data)

1. **URL**: http(s)://yourserver.yourdomain/plugins/servlet/tempo-getWorklog/?dateFrom=2011-01-01&dateTo=2011-01-31&format=xml&diffOnly=false&tempoApiToken=my-token
   a. NB. **This is an HTTP GET method**
   b. The Tempo API Security Token is explained in the Access control page.
2. **Parameters**:
   a. dateFrom=yyyy-mm-dd
   b. dateTo=yyyy-mm-dd
      i. Note that skipping both dates returns the current "open period" which is controlled in JIRA Admin.
   c. format=xml|excel|testData
      i. External applications use the XML format
      ii. See this page if you want to include JIRA custom fields to the XML export
      iii. testData creates an XML that can be used as input to update
   d. diffOnly=true|**false**(default)
      i. External applications use diffOnly=true to get only changed records since last **GetWorklogs**

        ii. diffOnly returns only records that have changed since last update (**UpdateWorklogs**) or are marked as external error (**external_result** is not OK)
    e. errorsOnly=true|**false**(default)
        i. Returns a list of worklogs that the external system marked as error or are not valid for export (missing **billingKey** or **staffId** or expression is invalid)
    f. validOnly=true|**false**(default)
        i. Returns a list of worklogs that are valid for import, i.e. have both **billingKey** and **activity**
    g. addBillingInfo=true|**false**(default)
        i. Adds billing info to each worklog
    h. addIssueSummary=true|**false**(default)
        i. Adds issue summary field to each worklog
    i. addIssueDetails=true|**false**(default)
        i. Adds issue details such as issue type, original estimate, remaining estimate, version, component, project key, project category, project name and issue priority.
    j. addWorklogDetails=true|**false**(default)
        i. Adds worklog details such as creation date and updated date
    k. addUserDetails=true|**false**(default)
        i. Adds user details such as user full name and all JIRA user properties. User properties displayed in **XML format only**
    l. headerOnly=true|**false**(default)
        i. Returns only header information (no data). Used to see the current "open period".
    m. userName=userName
        i. Filters by dates and userName only
    n. billingKey=billingKeyId
        i. Filters by dates and billing key (Account, Expenditure Item) only
           Global Accounts are not supported
    o. addIssueDescription=true|**false**(default)
        i. Adds issue description field to each worklog in **XML format only**
    p. addParentIssue=true|**false**(default)
        i. Adds parent issue details to each worklog in a sub-task. Valid in **XML format only**
    q. projectKey=projectKey
        i. Filters by dates and project key only
    r. issueKey=issueKey
        i. Filters by dates and issue key only
    s. addApprovalStatus=true|**false**(default)
        i. Adds Timesheets approval status, reviewer, time-stamp and comment for a user timesheet
           approvalStatus is not part of diffOnly=true

1. **Result example**:

Example results from GetWorklogs


```
<?xml version="1.0" encoding="UTF-8"?>
<worklogs>
  <worklog>
    <worklog_id>46445</worklog_id>
    <issue_id>13189</issue_id>
    <issue_key>CLOUD-18</issue_key>
    <hours>8.0</hours>
    <work_date>2011-10-11</work_date>
    <username>erica</username>
    <staff_id>2410724289</staff_id>
    <billing_key>6</billing_key>

<billing_attributes>Account=201405,Billable=3600,Box=true,Input=abc,long
Select=11,Number=123,Type=3<billing_attributes/>
    <activity_id>v10444</activity_id>
    <activity_name>CloudBay Sprint 4</activity_name>
    <work_description>Review</work_description>
    <parent_key/>
    <reporter>john</reporter>
    <external_id/>
    <external_tstamp/>
    <hash_value>dc11dffc091fcc72e7358067a9488fa1e31ce314</hash_value>
  </worklog>
</worklogs>
```


Activity information: The activity for the worklog is one of the following:

- The **Version** on the issue. If there are more than one versions on the issue the version selected as the activity is the top one in the Schedule order. Activity id has v as a prefix
- The **Component** on the issue. If there are more than one component on the issue the component selected is the latest (the one with the highest id). Activity id has c as a prefix
- If the issue has both a **Component** and a **Version** the version is selected as the activity

UpdateWorklogs

Updates worklogs with external information (external id & external hours).
Note: The *hash_value* field from *getWorklog* must be used with the update to verify the integrity of the update.

1. **URL**: http(s)://yourserver.yourdomain/plugins/servlet/tempo-updateWorklog/?tempoApiToken=my-token
   The Tempo API Security Token is explained in the Access control page.
   a. HTTP GET opens a simple form to paste XML input (used for testing)
   b. HTTP POST accepts XML input and updates worklogs in JIRA
      i. The input XML must be sent as parameter: **worklogs**
2. **Input example**:

Example input to UpdateWorklogs - POST-ed with the worklogs parameter

```
<?xml version="1.0" encoding="UTF-8"?>
<worklog_updates>
  <worklog_update>
    <worklog_id>46445</worklog_id>
    <external_id>SAP-ID-12345</external_id>
    <external_hours>8.0</external_hours>
    <external_result>OK</external_result>

<hash_value>dc11dffc091fcc72e7358067a9488fa1e31ce314</hash_value>
  </worklog_update>
</worklog_updates>
```

3. **Output example**:

Example output from UpdateWorklogs

```
<?xml version="1.0" encoding="UTF-8"?>
<worklog_results>
  <worklog_result>
    <worklog_id>46445</worklog_id>
    <external_id>SAP-ID-12345</external_id>
    <result_tstamp>2011-10-12 11:13:48</result_tstamp>
    <external_hours>8.0</external_hours>
    <external_result>OK</external_result>
    <update_result>OK</update_result>
    <ms>125</ms>
  </worklog_result>
</worklog_results>
```

WorklogReport

Returns a worklog report as XML that can be used as input to a reporting tool (iReport).

1. **URL**:
   http(s)://yourserver.yourdomain/plugins/servlet/tempo-getWorklogReport/?dateFrom=2011-01-01&dateTo=2011-02-01&billingKey=6&useExternalHours=true|false&tempoApiToken=my-token
   The Tempo API Security Token is explained in the Access control page.
2. **Parameters**:
   a. dateFrom=yyyy-mm-dd
   b. dateTo=yyyy-mm-dd
   c. billingKey=**billing key** to be used in the query
   d. useExternalHours=false|**true** (default). External hours are hours registered in external system with *updateWorklog*.

BillingKeyList

Returns a list of available accounts (billing keys), to be used when creating reports.

1. **URL**: http(s)://yourserver.yourdomain/plugins/servlet/tempo-billingKeyList/?tempoApiToken=my-token
   The Tempo API Security Token is explained in the Access control page.
2. Note that the **enabled** attribute can have the following values:
   a. "2" - Closed: The account was closed manually in Tempo Accounts.
   b. "3" - Open: The account is open

HolidayList

Returns a list of registered non-working days (holidays), to be used when calculating required hours in an external system

1. **URL**: http(s)://yourserver.yourdomain/plugins/servlet/tempo-holidayList/?tempoApiToken=my-token

If you are adding a parameter like the security token in the url above you need to add ? before the first parameter.

Getting help and support

Tempo Product and System Plugins Support Pages

Every Tempo product and all system plugin have their own support space on this wiki including all Release Notes pages, recently created issues and other useful information about using the product.

Tempo Products	Tempo System Plugins
Tempo Timesheets	Tempo Teams
Tempo Planner	Tempo Accounts
Tempo Budgets	Tempo Core
	Tempo Planning API

Questions

If you cannot find your answer in our documentation, you may want to consider submitting your question to Atlassian's user-based question and answer community, Atlassian Answers (you can search the Tempo tags).

FAQ

We also have an FAQ section on our support desk.

Tempo Support

At Tempo, we aim to deliver world class support. As such we now have a dedicated support desk that will help our customers solve their daily needs.

You can now submit your queries via our new support desk and whilst you are there, please feel free to browse our knowledge base or join in our Tempo Community discussions.

+

Request a Feature and Report a Bug

We value feedback and comments on how we can make Tempo Products better. If you want to request a new feature, or report a bug in a Tempo product please contact our Help Center.

Third-party trademarks

Microsoft and Excel are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Glossary

Account

An account is a new dimension on JIRA Projects, since it is linked to one or more projects. It has attributes like category and customer. Accounts make it possible to link JIRA Issues to an external accounting system and to group issues from many projects under a common entity.

Account Approval Process

Accounts can be approved by users with the Approve Timesheet permission, if the *Account Approval Process* is enabled in the global configuration administrative section. It does also depend on the period management, e.g. the period for users with the Approve Timesheet permission needs to be open, but closed for team members. This means that the process does only work for the mont h date range. The status for the account is either *Approved* or *Not approved*. T

Tempo Accounts

Tempo Accounts is a system add-on shipped with Tempo Timesheets. It is used to connect multiple JIRA Projects, customers and responsible parties.

Account Report

Account Reports are generated from the Account timesheet data. To be able to create a report with data from many users, the Approve Timesheet permission is needed. The reports can be based on different account attributes, e.g. accounts, customers, categories and account lead.

Gives the best report overview (All Accounts option), if Accounts are set as a Worklog Attribute and the current user has the Browse Projects Project Permission for all the JIRA Projects.

Account Timesheet

The Account timesheet displays logged work on accounts for a designated period. The Approve Timesheet permission is needed to see work logged by other users on an account. If the *Account Approval Process* is enabled in the global configuration administrative section, statues for the Account Approval Process are also displayed.

Activities

Activities used in 'Tempo Timesheets' and 'Planning' include: JIRA Project, version, and component.

Advanced Timesheet

The Advanced Timesheet displays worked and planned (if enabled) time for a designated period and gives users the option to customise their timesheet view, through pre-defined filters. Invalid worklogs is the standard filter, that is only available in this timesheet. The Approve Timesheet permission is needed to see work logged by other users. The timesheet is also available in report and list view.

Atlassian Marketplace

Atlassian provides the Atlassian Marketplace to connect add-on developers to customers with a unified purchasing experience. The Marketplace experience makes it easy for users to manage, upgrade, and renew their licenses. Tempo licenses for JIRA download have been migrated to the Atlassian Marketplace. Tempo OnDemand is not yet available on the Atlassian Marketplace.

Global Configuration

Global Configuration refers to the process by which Tempo 'Time Tracking' is enabled and activated in JIRA, including the selection of general options that will affect all settings in Tempo.

Issue Timesheet

To be defined...

Internal Activities

Internal Activities used in Tempo time sheets and Planning include: JIRA Project, version, and component. The Internal Activities feature is intended for vacation planning and other out-of-office time (i.e., meetings, sick time, etc.).

Navigation List

The 'Navigation List' is the main navigation interface in Tempo.

License Details

License Details refer to your current Tempo licensing information, and include the type of license, the party to whom the license is issued, the issue date, expiration date, Tempo and JIRA user limits, and license versions.

Project Timesheet

The Project Timesheet shows the progress for a selected project and date range. To be able to view the contribution from other users to the project, the current user needs to be in the Tempo Project Managers role for this JIRA Project. It is also possible to view a breakdown of versions or

On this page

components. The timesheet is also available in report and list view.

Reports

The Reports feature allows users to generate an overview of projects, Activities, JIRA issues, and planned and logged work (Worklogs). User Reports, Project Reports, and Advanced Reports are available. Users with the Approve Timesheet permission can generate Team Reports and Account Reports.

Team Timesheet

The Team Timesheet displays worked and planned (if enabled) time for a designated period and a Tempo team. The Approve Timesheet permission is needed to see work logged by other users. It is also possible to view a breakdown of versions or components. The timesheet is also available in report and list view.

Tempo Administrator

The **Tempo Administrator** is a **Permission**, that needs to be given by JIRA Administrators to **selected JIRA groups** to handle administrative options that may change frequently. This gives access only to a **subset** of the administrative tabs in Tempo, e.g. Internal Issues, Non Working Days, Period Management, Worklog Validation and Workload Schemes.

Tempo Project Managers

Users in this role can see all user worklogs within a particular project. This role is used in the Project, Issue and Agile Timesheets views. It is also used similarly in the JIRA Issue View for the planning mode Collaborators side panel. The users and/or groups that are in this role for a JIRA Project, can see worklogs that other users have contributed to this project.

Tempo Services

The Tempo services are designed as a **Machine-to-Machine** communication and are usually not used by normal users. The services provide **ALL** worklogs, regardless of permissions. The services should therefore be used with care and should only be open to a limited number of people/computers. JIRA administrators control access to the Tempo services with IP address filtering.

Tempo Gadgets

Tempo Gadgets are special optional features that may be added to a user's JIRA dashboard or on a page in Confluence.

Tempo Labs

Tempo Labs is a new feature that allows users to preview future functionality in Tempo, and provides customers the option to collaborate with us on improving and enhancing these features for future versions of Tempo.

Tempo License Key

A Tempo License Key is the unique identifying code issued for Tempo license that is purchased, renewed, or upgraded, and must be entered into either the Universal Plugin Manager (if the license is purchased through the Atlassian Marketplace) or in the Tempo license key field (if the license is purchased through Tempo) to activate Tempo.

Tempo Scheduler

The Tempo Scheduler can be used by JIRA admins to limit users to adding and editing worklogs within an designated period by selecting 'Weekly' or 'Biweekly' as a period type.

If the Tempo Scheduler is configured with some email settings, all members in the designated Tempo groups will receive an email according to the configuration.

Tempo Team Manager

The **Tempo Team Manager** is a **Permission**, that needs to be given by JIRA Administrators to **selected JIRA groups** to handle Tempo teams administrative option in Tempo.

Tempo Time Tracking

The **Tempo Time Tracking** is a **Permission**, that needs to be given by JIRA Administrators to **all JIRA groups**, that should have the option to **access the Tempo plugin**.

Time Planning

Users in Tempo can designate the amount of time expected for an Activity (designated by Issue, Project, Component, Version, or Internal Activity) for a designated date or period.

Timesheet

A 'Timesheet' provides an overview of total Time Tracking registered for 'Activities' and 'Internal Activities' within a designated period, and is viewable by User, Project, Team, and Account. An Advanced Timesheet is also viewable.

Timesheet Approval Process

Users may submit their Timesheets monthly or weekly for approval, and users with the Approve Timesheet permission are provided with an overview of each user's workflow status. This feature must be enabled using the 'Global Configuration'.

Time Tracker

Tempo's Time Tracker is a real-time time tracking mechanism that works as a stopwatch and allows users to track time spent on working on a particular JIRA issue as they complete it.

Time Tracking

Time Tracking is the process by which Tempo enables its users to track planned and allocated time on Activities in JIRA.

Tools

The 'Tools' list is displayed in every Tempo page through the Navigation List, and allows users to view their User Preferences and information About Tempo.

Universal Plugin Manager (UPM)

The UPM is a feature offered by Atlassian that allows JIRA admins to manage installed JIRA add-ons, check for upgrade compatibility, search for other add-ons, and install licenses immediately.

User Timesheet

The 'User Timesheet' gives the ser an overview of the total 'Time Tracking' for the selected period, and an option to log work and edit worklogs.

Views

The 'Views' list is displayed in every Tempo page through the Navigation List, and allows users to select what issues are displayed on the timesheet by checking 'Activities' and any custom made filters, or selecting a filter from a pre-designated list of favorite filters.

Worklog

What is a worklog?

Every time a user logs work in a JIRA issue, a **worklog** is created. A worklog has the following properties:

Hours worked: The time a user spends on an issue, in hours -- i.e., 1.5 hours = 1 hour and 30 minutes.
Work date: Date on which work is performed – i.e., 28/Aug/12 = August 28, 2012.
Created date: The date on which a worklog is created – i.e., 2012-07-03 12:39 = March 7, 2012 at 12:39 PM.
Updated date: The date on which the worklog was last updated – i.e., a worklog description is changed or a time entry is edited.
Description: Includes a description of the work to be completed in whatever detail is necessary.

Logging Work JIRA documentation

Where can users view their worklogs?

Tempo users can view their worklogs in:

The Tempo tab in the Issue view. Worklogs are displayed within each designated period. To view, select an Issue, and scroll down below –>Details –>Description –>Tempo.
Tempo Day or Week Timesheet view. All worklogs worked within the selected date. To view, click on the Tempo view and select a period (day, week, or other period).
Worklog Report. All worklogs within the selected period and belonging to the current user are displayed. To view, click on the Tempo view and select a period (day, week, or other period), and click the Report button.
Project Report. All worklogs on issues belonging to the selected project and created within that designated period. To view, select the Project view and click Issues. Narrow down to version or component, if desired.

Invalid Worklogs

An issue is considered invalid for billing purposes if there is no billing key indicated in the issue. In addition, if a user with the Approve Timesheet permission creates an expression with required fields, and one or all of the selected fields are empty, this will be deemed invalid.
Examples of those fields are FixVersion and Component.

Please note that this is at the issue level, so editing the issue fixes all worklogs on the selected issue.

Workflow Approval Process

Activities used in 'Tempo Timesheets' and 'Planning' include: JIRA Project, version, and component.

Worklog Attributes

Attributes can be created and added to worklogs. An example of a worklog attribute is a simple true/false value such as "Overtime," "Not Billable," or "Driving Cost," or more complex Dynamic Drop-downs that are populated by a JSONP script. These attributes are stored as a key-value pair within the worklogs.
By using the expenditure item as a worklog attribute, the user has the option to select from all expenditure items mapped to the project to link the item with the worklog instead of the JIRA issue.

Please comment on this page if you would like to add or see some terms to this page.