TIMESHEETS

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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.
- 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.
 Write a value in Hours per day and Days per week fields, but those values are used in Tempo Default Workload Scheme.
 Old the default value is the set of the default of the default value is the default value
- 4. Click the Activate button to turn time tracking ON.

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: ^[10]) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Global Configuration** option.

W 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

User with Approve Timesheet Permission can log work for team members

- User can not log work on parent issues
- Log work with start time
- Remaining estimate is optional
- Worklog description is optional
- Allow logging on closed and archived accounts
- Allow logging on not editable issues

Max hours per day per user: Unlimited (Max 99h per worklog) •

Users allowed to register time into future: 90 Days 🔻

Approval Processes and Accounting

Enable timesheet approval process Disabled

Enable Account Approval Process

User with Approve Timesheet Permission can set billed hours

Team member can set billed hours

Planning

User can plan time

Enable Time Planning

Labs (Experimental Features)

Enable Account PDF Export - (Not available for Global Accounts, yet)

Plan Workflow - Allows plans to be submitted for a supervisor's review. Unless disabled,

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Agile Timesheet - See all worklogs associated with JIRA Agile boards and sprints. Curre

Time Tracking Permissions and Validation

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

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: ¹) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Global Configuration** option.

C Tip: Use Keyboard Shortcut instead: g then g and start typing Global Configuration.

The Time Tracking Permissions and Validation options in Global Configuration

Time Tracking Permissions and Validation

- User with Approve Timesheet Permission can log work for team members
- User can not log work on parent issues
- Log work with start time
- Remaining estimate is optional
- Worklog description is optional
- Allow logging on closed and archived accounts
- Allow logging on not editable issues

```
Max hours per day per user: Unlimited (Max 99h per worklog) ▼
```

Users allowed to register time into future: 90 Days 🔹

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 <i>enabled</i> , users with the Appr ove Timesheet permission, can log work and edit hours for all their team members.
User can not log work on parent issues	Νο	If <i>enabled</i> , 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	Νο	If <i>enabled</i> , 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 <i>enabled</i> , and an issue has no <i>Original estimate</i> , the <i>Rem</i> <i>aining estimate</i> 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 <i>enabled</i> , and no text is written in the Log Work Descri ption field, a default text <i>Worki</i> <i>ng on Issue \$key</i> 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 <i>disabled</i> , 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 <i>disabled</i> , and the jira.iss ue.editable property is set to false in the JIRA workflow status, a Tempo Timesheets user can not log work.
		1 A few notes:
		 This property is false by default in the JIRA workflow for issues in Clo sed status. If enabled the workflow status must have a transition to Reopened st atus 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 n in the JIRA Misc Workflow Extensions plugin, if you don't want users to reopen issues. There is also an option to use the <i>jira.permission.w</i> ork.denied property as documented on this page
Max hours per day per user	Unlimited	Unlimited is max 99 hours. If a <i>limited</i> value is selected from the drop-down list, the lowest value is set as the <i>Hours per day</i> in JIRA Time Tracking set tings 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. <i>0 Days</i> me ans the user can not log work for Tomorrow. <i>360 Days</i> mean s 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)

ssue	User	John Steel		*
nternal				
ssigned	lssue	AKA-29 - Cre	ate new product page for AKA	•
Vatched	Period			
lilter	Date	07/Mar/16		
	Time	1:04 pm		
	Worked		Logged 40h	
	Billed			
	Remaining estimate	0h	Original estimate 0	
	Description			
				10

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.

User	John Steel		•
Issue	🚺 AKA-29 - Creat	te new product page for AKA	-
Period	Ø		
Date	07/Mar/16		
End date	16/Mar/16	0	
Time	1:04 pm		
Work per day		Logged 40h	

• 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.

I 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.

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.
 - V Tip: Use Keyboard Shortcut instead: g then g and start typing Global Configuration.

The Approval Processes and Accounting in Global Configuration

Approval Processes and Accounting

Enable timesheet approval process Disabled

Enable Account Approval Process

User with Approve Timesheet Permission can set billed hours

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Team member can set billed hours

Available Options

|--|

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*.

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	Default Value: No
can set billed hours	

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.

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.

W Tip: Use Keyboard Shortcut instead: **g** then **g** and start typing **Global Configuration**.

The Planning options in Global Configuration

Planning

Subser can plan time

Senable Time Planning

Table: Planning explained

Option	Def aul t	Description
User can plan time	Ye s	When <i>enabled</i> , this means the Plan Time button will show up in all timeshe ets, except the Account Timesheet for team members.
Enable Time Planning	Ye s	When <i>enabled</i> , this means the Plan Time button is activated and will show up in in all timesheets, except the Account Timesheet for users with the App rove 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 Glob al 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.

V Tip: Use Keyboard Shortcut instead: g then g and start typing Global Configuration.

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

Labs	(Experimental	Features)
------	---------------	-----------

Enable Account PDF Export - (Not available for Global Accounts, yet)

Plan Workflow - Allows plans to be submitted for a supervisor's review. Unless disabled, notification emails are sent on any workflow actions Agile Timesheet - See all worklogs associated with JIRA Agile boards and sprints. Currently only available for users with JIRA Agile installed.

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

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)

On this page Account PDF Export Plan Workflow Agile Timesheet

PDF Configuration	0
Please note: This is an experimental feature and is subject to change in the future (Global Accounts	not supported, yet.)
PDF Reports Logo	
Provide your own logo for generated PDF reports.	
Restore to	default value
PDF Paper Size	
Select the paper size for generated PDF reports. A4 :	
External Hours	
PDF uses external hours False =	
Save	
he PDF Configuration page is explained below:	
 You can include a logo in every report, by copying the its url into the field screenshot above. 	t as in the
Click the Restore to default value link if the logo has been uploaded to Look and Feel configuration.	through JIRA's

- 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.

(i) 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

- On the top menu bar, click the Administration cogwheel System.
 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 уууу
1 September 2016	d ММММ уууу

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

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

Тір

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

Tempo permissions

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

TEMPO Global Configuration Tempo Permissions Internal Issues Period Fields Worklog Attributes Period Management Account Manager Worklog Validation Scheduler Access Control PDF Configuration Workload Schemes Holiday Schemes License Details

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.



Tempo time-tracking permission

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

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)

ATLASSIAN WARKETPLACE	Tempo Global Permis	sions	
Find new add-ons	JIRA Administrators can ma	nage all Tempo global permissions. Here, you can view and change i	available permissions and the groups assigned to them.
Manage add-ons Purchased add-ons	Permission	Description	Groups
UPPLICATION LINKS	Tempo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	 A jira-administrators tempo-administrator
OURCE CONTROL	Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied)	 Ina-administrators Isam-managers
VCS Accounts ishEye Configuration	Tempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	A tempo-time-tracking
Perforce Job Integration			

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)

IIRA Administrators can ma	anage all Tempo global permissions. Here, you can view and char	nge available permissions and the groups assigned to them.	
Permission	Description	Groups	
Tempo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	3 jira-administrators 3 tempo-administrator	
Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied)	 jra-administrators team-managers 	
empo Time Tracking	Permission to access Tempo time tracking (Tempo	tempo-time-tracking × jra	Update Cancel
	users must have this permission)	Showing 3 of 3 matching groups	
		Jira-administrators	
		jira-developers	
		jira-users	

(i) The default JIRA Groups used for this permission, are **jira-administrators** and **jira-developer** s (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

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 *Brows e Projects* permission, see No Access notification page for more info.

No Access notification

No Access in Tempo Timesheets

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

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

In this chapter

In this chapter

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 Permissions Tempo Global Permissions

Tempo Account Manager permission gives access to manage accounts.

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

Tempo Permissions administration page - click to enlarge

Related pages		
•	Tempo	
	Accounts	
•	Tempo	
	Permissions	

In this chapter

On this page you can edit th	he Tempo global permissions. Note that JIRA Administrators can mai	nage all Tempo global permissions.	
Permission	Description	Groups	
Tempo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	at tempo-administrators	
Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied)	🚴 manage-teams	
Tempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	 A jira-developers Jira-administrators tempo-time-tracking 	
Tempo Account Manager	Permission to manage Accounts (Tempo Administrators implied)	atempo-account-manages	
Tempo Rate Manager	Permission to manage Cost and Price Rates	a tempo-rate-managers	
Tempo Project Permis Permission to View Proj By default the role giving us changing the settings below	ect worklogs sers permission to View all Project Worklogs is the "Tempo Project M	lanager Role". If you would like to use anot	er role for this purpose you can do so by
	s Tempo Project Managers 💌		
Add Default Members fr	rom 'Tempo Project Managers' to Existing Projects		
Use the Edit Default Membe	er for Project Role page to change default members for new projects.	To make these settings also apply to all ex	isting projects use the function below.
Default Users	Default Groups		
	bendan oroupa		

Manage Rates

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

Tempo Rate Manager in administration page - click to enlarge

Tempo Global Permis	sions	
On this page you can edit th	e Tempo global permissions. Note that JIRA Administrators can ma	nage all Tempo global permissions.
Permission	Description	Groups
Tempo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	a tempo-administrators
Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied)	a manage-teams
Tempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	 jira-developers jira-administrators tempo-time-tracking
Tempo Account Manager	Permission to manage Accounts (Tempo Administrators implied)	atempo-account-manages
Tempo Rate Manager	Permission to manage Cost and Price Rates	a tempo-rate-managers
empo Project Permis Permission to View Proje By default the role giving us changing the settings below.	bet worklogs ers permission to View all Project Worklogs is the "Tempo Project N	anager Role". If you would like to use another role for this purpose you can do so
Role to view project worklog	Tempo Project Managers V	
Add Default Members fro	om 'Tempo Project Managers' to Existing Projects	
Use the Edit Default Membe	r for Project Role page to change default members for new projects.	To make these settings also apply to all existing projects use the function below.
Default Users	Default Groups	
	view-all-worklogs	Add to all existing projects

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)

XJIRA Dashboards - Proj	ects • Issues • Tempo • Agile •	Create	Search C	0- 💁 🛃-
BROWSE « Teams Accounts	÷ Accounts		Give Tempo Feedb	Create Account
ACCOUNTS Open and Closed Lead by Me Archived	Customers Accounts can be grouped by custome	r for accounting or other manage	ment purposes.	Overview Manage *
MAINTENANCE	Key	Name		
Global Unassigned Project Unassigned Customer Uncategorized Accounts	100450	AKA Control System	Add	View Customer
	1245	Cloud Bay Inc	Delete	· View Customer
	100201	CloudBay	Delete	View Customer
	100100	GreenCloud	Delete	View Customer
	100876	Ministry of Health	Delete	View Customer

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.

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**.

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

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

emerit aystem Add-ons		
Tempo Global Permissio	205	
On this page you can edit the Te	empo global permissions. Note that JIRA Administrators can manage all Tempo g	lobal permissions.
Permission	Description	Groups
Tempo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	A tempo-administrator
Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied)	A manage-teams
Tempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	A tempo-time-tracking
Tempo Account Manager	Permission to manage Accounts (Tempo Administrators implied)	a manage-accounts
Tempo Rate Manager	Permission to manage Cost and Price Rates (Tempo Administrators implied)	A manage-rates
	On this page you can edit the Tr Permission Tempo Administrator Tempo Team Manager Tempo Time Tracking Tempo Account Manager	Tempo Global Permissions On this page you can edit the Tempo global permissione. Note that JIRA Administrators can manage all Tempo global permission to administrate Tempo (JRA Administrators implied) Permission Description Tempo Team Manager Permission to administrate Tempo (JRA Administrators implied) Tempo Team Manager Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied) Tempo Time Tracking Permission to access Tempo time tracking (Tempo users must have this permission) Tempo Account Manager Permission to manage Accounts (Tempo Administrators implied) Tempo Administrators implied) Tempo Administrators implied)

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)

Tempo Global Permissi	019		
in this page you can edit the T	empo globel permissions. Note that JIRA Administrators can manage all Tempo	global permissions.	
Permission	Description	Groups	
empo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	at tempo-administrator	
Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JRA Administrators are implied)	a manage-teams	
lempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	a tempo-time-tracking	
empo Account Manager	Permission to manage Accounts (Tempo Administrators implied)	at manage-accounts	
Tempo Rate Manager	Permission to manage Cost and Price Rates (Tempo Administrators implied)	Showing 3 of 3 matching groups	Update Cancel
		Jra-administrators	
		jra-developers jra-users	

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

Tempo Project Role Management

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.

Tempo Project Permiss	ons	
Permission to View Proje	t worklogs	
By default the role giving user do so by changing the setting	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 below.	
Role to view project worklogs	Tempo Project Managers *	

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.

Tempo Project Permissio	
Permission to View Project	rklogs
By default the role giving users (do so by changing the settings b	nission to View all Project Worklogs is the "Tempo Project Manager Role". If you would like to use another role for this purpose you ca w.
Role to view project worklogs	o Project Managers *
Add Default Members from	mpo Project Managers' to Existing Projects
Use the Edit Default Member for below.	sject Role page to change default members for new projects. To make these settings also apply to all existing projects use the function
Default Users	Default Groups
	Add to all existing projects

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

On	this page
٠	Permission to
	View Project
	worklogs
٠	Add Default
	Members to
	Existing
	Projects
•	Add Users to
	Project Roles

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.

Тір

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.

Name	GreenCloud Default Workload Scheme
Description	GreenCloud Default Workload Scheme
Mon	8h
Tue	8h
Wed	8h
Thu	8h
Fri	8h
Sat	Om
Sun	Om

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* del eted whenever you *update* the Tempo Core system plugin.

Tempo Timesheets 8.0 Documentation

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

Log Work			
Issue Internal	User	Paul Bergen	
Assigned Watched	Period	Showing 3 internal issues	\$
Filter	Date	INT-1 Vacation Time INT-2 Sick Time	
	Worked	INT-3 Staff Meetings	
	Description		

Internal Activities

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

Plan Time		
Issue Project Version Component Internal	Activity	Paul Bergen INT - Vacation Planning 21/May/13

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.

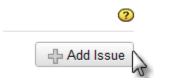
An issue can be selected from existing JIRA issues and modified into an **Internal Issue**. An internal issue has the following properties:

- 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.

Add Issue				
	ssue	in		
Ir		Showing 17 matching issues	^	
		INT-1 - Vacation Time		ancel
-		INT-3 - Staff Meetings		
		INT-8 - Meeting with clients and preperation	- 11	

3. Select the issue from the Issue key field

4. Click the Save button.

Ord	ler	Issue key	Issue description	Operations
	1	INT-1	Vacation Time	Delete
î	1	INT-2	Sick Time	Delete
î	1	INT-3	Staff Meetings	Delete
î	1	SUPPORT-5	General customer support	Delete
t	1	CLOUD-24	Planning and Retrospective meetings	Delete
t		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.

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;

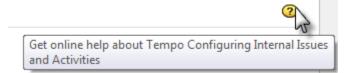
Туре	Version 💌	
Project	Please select	
Version	Please select AKA Control System	
Component	Internal Paradigm Cloud Service and Support	
	Wikkkieea Cloud	

- 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.

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

				01	02	03	04	05	06	07	08	09	10
т	S	Σ	P	Т	F	s	s	М	Т	W	Т	F	s
		0	40										
		0	16										
	Da	0 aily he		at:	_								
	Т		0	0 40 0 16	T S Σ P T 0 40	T S Σ P T F 0 40 0 16	T S Σ P T F S 0 40 0 0 16 0	T S Σ P T F S S 0 40 0 16 0 0	T S Σ P T F S S M 0 40 0 0 16 0	T S Σ P T F S S M T 0 40 0 16 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	T S Σ P T F S S M T W 0 40 6 6 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	T S S M T W T 0 40 0 16	T S S M T W T F 0 40

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: ¹²¹) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Worklog** Attributes option.

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

Worklog Attributes screen (click to enlarge)

These attributes are stored as a key-value pair with worklogs.	These attributes are stored as a key-value pair with worklogs.	These attributes are stored as a key-value pair with worklogs.
--	--	--

You can change the attribute list order by using the 1 and 4 icons.

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

1. Click the **Add Attribute** button

?
 ttribute

2. The Add Worklog Attribute window will display;

Name	
Туре	CHECKBOX -
External URL	
	Note: External URL must return a JSONP object values[[key: value]]
Required	
required	
Key	

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.

U 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.

Name	Another Account
Туре	ACCOUNT -
External URL	/rest/tempo-rest/1.0/accounts/json/billingKeyList/{lssue
	Note: External URL must return a JSONP object values[[key: value]]
Required	
Key	_AnotherAccount_
Only one attrib	oute of type Account is allowed
Save Can	cel

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

Issue	Issue	WIKK-4
Internal	Period	
Activity	Date	15/Feb/12
	Hours	Total hours spent N/A
	Remaining estimate	N/A Original estimate N/A
	Description	
	Туре	Please Select
	Account	

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



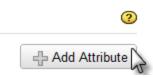
Account as a worklog attribute

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.

(i) 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:

Name	Account	
Туре	CHECKBOX	\wedge
External URL	CHECKBOX	45
	INPUT_FIELD	SONP object values[[key: value]
	DYNAMIC_DROP_DOWN	Sour object threes [[key: three]
Required	SCRIPT	0
Key	ACCOUNT	
1(0)		

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

Name	Account
Туре	ACCOUNT
External URL	/rest/tempo-rest/1.0/accounts/json/billingKeyList/{IssueKe
	Note: External URL must return a JSONP object values[[key: value]]
Required	
Required Key	

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

Name	Account
Туре	ACCOUNT
External URL	/rest/tempo-rest/1.0/accounts/json/billingKeyList/{lssueKe
Required Key	Note: External URL must return a JSONP object values[[key: value]]

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.

Account			<	D Views	✓ ∰ To Worklo	
201402	201403 - Wikkkieea Cloud: Development	Account				
201402	201403 - Wikkkieea Cloud: Development					
201402	201403 - Wikkkieea Cloud: Development					
	201403 - Wikkkieea Cloud: Development	201402				st

() 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.

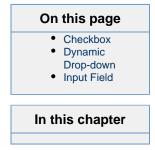
Worklog Attributes are used to add additional information on worklogs. There are currently tree types of worklog attributes in Tempo

- 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.

Checkbox

This is either True or False in Tempo reports



My Checkbox 📝

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.

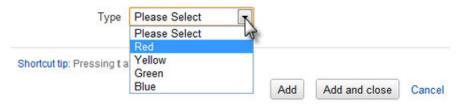
```
/rest/tempo-rest/1.0/accounts/json/getDynamicDro
pdown/|1|2|3|4/Please
Select|Red|Yellow|Green|Blue
```

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
```

1 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.

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: ¹) at the top right of your screen. Then scroll down to **Tempo** administration left tabs and choose the **Period** option.

Period

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

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

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

Default period

The default period defines the monthly period in the organisation and is used for closing periods, workflows, and billing.

Start	1	-	
Start month	Ja	nuary	-

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.

2nd Period	
An option is to have a second period	I. If second period is configured you can switch between the two different periods in all views.
2nd period start	1 .
2nd period start month	January 💌

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 **Times** heet Week View.

Week

Tempo Timesheet week view is displ	ayed with the	following start	day. It also	controls the v	week for weekly t	imesheet a	prroval.
Week starts on	Sunday						

Period management

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.
- 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)

SIRA Dashboards - Pro	ects - Issues - Ag	le - Tempo - 🛛 Cm	ate	Search	۹ 🐠 -	۰ 🚦
Administration 9	Search JIRA admin					6
Projects Issues User manag	ement System Add	lons				
ATLASSIAN MARKETPLACE	Period Manager	sent				d
Find new add-ons	Periods are used in	Temps to control if users ca	n "Log Work" to an issue on a cer	ain date and in the "Approval Proce	sses". Select y	
Manage add-ons	Period Number	Period	Status for Team Member	Status for users with Approv	e Timesheet Po	
Purchased add-ons	0915	01/Sep(15 - 30/Sep/15	Open •	Open •		2012 2011
APPLICATION LINKS	0815	01/Aug/15 - 31/Aug/15	Open •	Open •		2010 2009
Application Links	0715	01/Jul/15 - 31/Jul/15	Open •	Open •		
SOURCE CONTROL	0615	01/Jun/15 - 30/Jun/15	Open •	Open •		
DVCS Accounts	0515	01/May/15 - 31/May/15	Closed •	Closed •		
FishEye Configuration Perforce Job Integration	0415	01/Apr/15 - 30/Apr/15	Closed •	Closed •		

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 A pprove 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 perm ission 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* tha n 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.

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

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



Configuring Tempo scheduler

The **Tempo Scheduler** can both be used to schedule closure and reminders to add and edit workl ogs 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: 2) at the top right of your screen. Then scroll down to Tempo Timesheets administration left tabs and choose the S cheduler option.

W 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)



Current Scheduler Settings

Name:	Weekly Reminder	
Туре:	Weekly	
Status Reminder:	25/Aug/13 23:59 GMT	<i>"</i>
Late Reminder:	27/Aug/13 11:59 GMT	
Active:	0	
Last Close:	11/Aug/13 23:59 GMT	
Next Close:	27/Aug/13 23:59 GMT	
Operations:	Edit	

Disable Tempo Scheduler

Test Scheduler Email

List Users that Receive Email from Scheduler

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

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)

On this page
 Scheduled closing dates Scheduled reminders
In this chapter

Video

Edit Scheduler	0
Name	Weekly Reminder
Туре	Weekly :
Repeat on (Weekly)	🔾 Monday 🔾 Tuesday 🔾 Wednesday 💭 Thursday 💭 Friday 🕢 Saturday 💿 Sunday
Make Scheduler Close	9
Close	2 working days after end date
Email Settings	Status reminder for all users - Tempo users will receive reminder on end date Status reminder for late users - Tempo users with uncompleted timesheets will receive reminder hours (set below) before close time
Send email to late users	12 hours before closure
Activate This Scheduler	ø
٤	Save Cancel

Table: Items from the screenshots above explained

Scheduler Item	Description
Name	The name of the scheduled closure configuration.
Туре	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.
	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.
	i 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.

(i) 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

Time Zone

Australia (GMT+10:30) Lord Howe

The time zone used when showing date time information.

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

Current Scheduler Settings

Name:	Weekly Reminder	
Туре:	Weekly	
Status Reminder:	25/Aug/13 23:59 GMT (26/Aug/13 10:29 LHST)	7
Late Reminder:	27/Aug/13 11:59 GMT (27/Aug/13 22:29 LHST)	a
Active:	0	
Last Close:	11/Aug/13 23:59 GMT (12/Aug/13 10:29 LHST)	
Next Close:	27/Aug/13 23:59 GMT (28/Aug/13 10:29 LHST)	
Operations:	Edit	

In the first screenshot above, three links are shown:

1. Disable Tempo Scheduler - displays the following screen:

Scheduler

Tempo Scheduler is currently disabled.

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

Enable Tempo Scheduler

- 2. Sending test email from Tempo scheduler
- 3. List Users that Receive Email from Scheduler displays a list of users receiving emails from the scheduler. The users listed 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

Current Scheduler Settings

Name:	Weekly	Veekly Reminder			
Туре:	Weekly				
Status Reminder:	25/A	25/Aug/13 23:59 GMT 📮			
Late Reminder:	26/A	26/Aug/13 11:59 GMT			
Active:	0				
Operations:	Edit				

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

Name	Weekly Reminder
Туре	Weekly
Repeat on (Weekly)	🔆 Monday 🔿 Tuesday 🔾 Wednesday 🔾 Thursday 🔿 Friday 🕓 Saturday 💿 Sunday
Make Scheduler Close	
Email Settings	Status reminder for all users - Tempo users will receive reminder on end date Status reminder for late users - Tempo users with uncompleted timesheets will receive reminder hours (set below) after end date
Send email to late users	12 hours after end date
Activate This Scheduler	×

In the send email to late users [], changes from hours before closure to hours after end date.

Configuring the email template in Tempo scheduler

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.

In this chapter

The edit icons for active Reminders - Status and Late Reminder

Current Scheduler Settings

Active:	0		
Late Reminder:	27/Aug/13 11:59 GMT	Q	2
Status Reminder:	25/Aug/13 23:59 GMT	Q	2
Type:	Weekly	_	
Name:	Weekly 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)

ocalize emails from 1	Tempo Scheduler. Pick parameters from list of available parameters.
Template subject	Tempa Reminder
Template text	(ci) spin-fram/hum, And, thereta, sub-set/fram/set 2006; citier 4000-116 Spin-fram/set/ener(ci)> cityshor-fram/hum, And, thereta, sub-set/fram/set 2006; citier 4000-116 Spin-fram/set/ener the Tempo will dise for time registration for the current period soon. (cit) spin-fram/set/spin-fr
	• Nat align="right" style="padding: San: bender: Las solid #Bab">#Period: • Cast style="padding: San: bender: Las solid #Bab;">San: Facility: Cradi- cast style="padding: San: San: Facility: Cradi- cast style="padding: San: Bab;">San: Facility: Cradi- cast style="padding: San: San: Facility: Cradi- style: Cradicast style="padding: San: Facility: San: Facility: Cradicast style="padding: San: Facility: San: Facility: San: Facility: Cradicast style="padding: San: Facility: San: Faci
	etd align="right" tayle="padding: Spix; border: Tpix solid #bbb;">Registration closing time:
	etro edulges-"right" hybre-"padding: Spic border: Jax solid Hibbl:">Your required hours for this period ic/tab edulges-"right" hybre-"padding: Spic border: Jax solid Hibbl:">Your required hours for this period ic/tab edulges: Table = Table = edulges: Table = Tab
	etty ett align="right" style="padding: 5px; border: 1px solid #bbd;">Your logged hours for this period etd style="padding: 5px; border: 1px solid #bbd;">Shourslogged
	etty - etti alujo-"vajit" shde-"padding: Spic border: Las solid #bbit"=vlo-stutus- etti shde-"padding: Spic border: Las solid #bbit, SsatusClass">ShourDiffeence.vlot- ettis:
	Collable: cdu triple="tont-family: Artial, Helvetica, sans-sent?, font-size: L4px; color: 4000; width: 371px; padding: 10px 10px; 0 10px; margin-top: 10px; bonder: 1px solid #bbb/>
	Construction of the second se Second second seco
	cit traje "Trait life, with: 100pc, fore-weight total, test-align right, manapin-bottom, fagi-2 sho "Procept Satella" (b) - (d) -
	(dit) (dit)/ dit ubje="font-family: Arial, Helvetica, sans-sanf. font-size: L4px; color:#000; width: 173px; padding: 10px 10px/0.10px; marpin-top: 10px; border: 1px solid #bbb.">
	<div sigle="flast left; width: 98%; padding: 0.5em 0; margin-bottom; 2px;"> <rb style="flast left; width: anto; display: inline; font-size: 15px; color: #666; font-weight: normal; padding-right: 0.25em; margin: 0;">Status for 2nd period 5period2-dateFrom - 5period2-dateTo</rb></div>
	cill merk-fastage block verfören håder, som 200% ² , og trage "Totat i verför höre, för som ander block fast som ander som ande som ander som a
	c)Bios (a) style="Tone-family_Arial_Inter-size_family_control family_control family_arial_section_family_arial_inter-size_family_control family_arial_inter-size_family_control family_arial_section_family_arial_inter-size_family_control family_control family_

Restore Default Show Preview

Save Cancel

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

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

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

Hi \$userFirstName

This is just a friendly reminder that Tempo will close for time registration for the current period soon. Your SreminderType timesheet status as of Snow

F	eriod:	SdateFrom to SdateTo
Registration closing	time:	\$closingDate
Your required hours for this p	eriod:	ShoursRequired
Your logged hours for this p	eriod:	ShoursLogged
SI	tatus:	\$hoursDifference
Status for period \$period-da	teFrom	n - \$period-dateTo
Through \$dateTo: Whole period: Speriod- hoursLogged / Speriod- hoursRequired	hours	SLogged- / Speriod- Required-
Status for 2nd period \$perio dateTo	d2-dat	eFrom - \$period2-
Through \$dateTo: Whole period: Speriod2- hoursLogged / Speriod2- hoursRequired	hours	sLogged- //Speriod2- sRequired-

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

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

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

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

Table: General Available parameters

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.

Granting a Grace Period in the Team Timesheet for Bob Johnson

Web Dev	velopmer	nt -								
					Ju	ily 11, 2	2013 -	July 24	, 2013	Þ
Ð										
					11	12	13	14	15	16
• Name	Σ	P	%		т	F	S	S	M	Т
Bob Johnson	4		10%	۰.						
Lars Petersen	20		25%	View	Time	esheet				
Paul Bergen	2		2.5%	Grace	Pe	riod 🍓)			
		Da	aily hours	User F	Prefe	erences	5			
		Wee	kly hours	total:						
		Plann	ned hours	total:						

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

Grace Period	
User	Bob Johnson
Grace Hours	2
Period from	14/Jul/13
Period to	21/Jul/13
	Add Grace Period Cancel

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

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

List Users that Receive Email from Scheduler

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

Open Grad	e Periods			
User	From	То	Open until	
paul	07/Jul/13	20/Jul/13	21/Aug/13 16:21	
bob	14/Jul/13	21/Jul/13	21/Aug/13 16:21	

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

Scheduler

Test

Sending test email from Tempo scheduler

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

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

	In	this	chapte
--	----	------	--------

3

The table below shows the name and type of the scheduler along with scheduling statuses of email reminders and the next closure date

Name:	Weekly Reminder	
Туре:	Weekly	
Status Reminde	r: 🖉 25/Aug/13 23:59 GMT	😡
Late Reminder:	27/Aug/13 11:59 GMT	😡
Active:	0	
Last Close:	11/Aug/13 23:59 GMT	
Next Close:	27/Aug/13 23:59 GMT	
Operations:	Edit	

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

The Send Test Email screen

Send Test Email		0
Email type	Status Reminder 💲	
Reminder type	Weekly :	
Week ends on	🔾 Monday 🔿 Tuesday 🔾 Wednesday 🔾 Thursday 🔵 Friday 💿 Saturday 🔾 Sunday	
Calculate status for user	john	
Send email to	john@t.is	
Send		

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.
 - Ine 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.

- 1. Log in as a user with the JIRA Administrators Global Permission.
- 2. Select Add-ons from the Administration menu (cog icon: 122) 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)

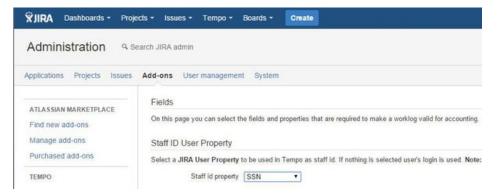
rojects Issues User manag	ement System Add-ons	
	Fields	0
ATLASSIAN MARKETPLACE Find new add-ons	On this page you can select the fields and properties that are required to make a worklog valid for accounting.	
Manage add-ons	Staff ID User Property	
Purchased add-ons	Select a JIRA User Property to be used in Tempo as staff id. If nothing is selected user's login is used. Note: This property must exist in your user account to be available in the list.	
APPLICATION LINKS	Shuff id property (SSK 1)	
Approation Links	Expression	
SOURCE CONTROL DVCS Accounts	You can create an expression to add more fields to be required for a valid worklog. An example of an expression for the following fields required Account and a Fix Version or a Component is: (flxVersions [] components) 8.5 Account	
FishEye Configuration	Expression No expression	
Perforce Job Integration		
BUILDS	Custom Fields	
Bamboo configuration	All checked JIRA Custom Fields are included in the XML export of Tempo data as listed in our Tempo Servict Manual page.	
JIRA AGILE	Account (id: 10710) Account (depreciated, this field is no konger being used) (id: 10006)	
JIRA Agle Configuration	Business Value (d: 10004) Epic Celour (d: 10013)	
Project Templates	Epic Link (id: 10210)	
Enabled Projects	Epic Name (d: 10211) Epic Status (d: 10212)	
JIRA Agle Labs	Epic/Theme (d: 10001) Flagged (d: 10001)	
Classic Migration	teration (id: 10810) Rank (id: 10811)	
License Details	Rank (Obsolete) (d: 10002)	
ISSUE COLLECTORS	Rank (Obsolvte) (d: 10010) Release Version History (d: 10310)	
Issue Collectors	Sprint (dt. 10110) Story Points (dt. 10003)	
TEMPO	Team (d: 10410) Export other fields	
Global Configuration	Support billed hours	
Tempo Permissions	Save	
Internal Issues		
Period		
Fields		

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

Configuring staff ID property

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.

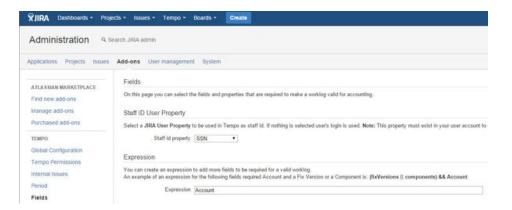
Worklogs created by users that don't have the set property, are shown as Invalid worklogs in timesheets.

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

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

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

Fields	
Worklog Attributes	Custom Fields
Period Management	All checked JIRA Custom Fields are included in the XML export of Tempo data as listed in our Tempo Servlet Manual page.
Worklog Validation	Account (id: 10611)
Scheduler	Account [deprecated, this field is no longer being used] (id: 10005) Business Value (id: 10004)
Access Control	Epic Colour (id: 10213)
PDF Configuration	 Epic Link (id: 10210) Epic Name (id: 10211)
Workload Schemes	Epic Status (id: 10212) Epic/Theme (id: 10001)
Holiday Schemes	Flagged (id: 10000)
License Details	 Iteration (id: 10610) Rank (id: 10511)
TEMPO ACCOUNTS	Rank (Obsolete) (id: 10002) Rank (Obsolete) (id: 10010)
	Release Version History (id: 10310)
Accounts Configuration	Sprint (id: 10110)
TEMPO TEAMS	 Story Points (id: 10003) Team (id: 10410)
Team Roles	TestingLabel (id: 10710) Export other fields
Team Field	Export billed hours
	Save

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.

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.

Required permission

JIRA Administrators permission

Table: Administrative Items related to Tempo Teams

Administrative Item	Short description
Teams permissions	This permission in currently called <i>Tempo</i> <i>Team Manager</i> 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.

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: ^[12]) at the top right of your screen. Scroll down the left sidebar until you see the **Tempo** configuration group and select **Tempo Permissions**.

In this chapter



In this chapter

V 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)

Administration 9.0	Search JIRA admin		
Projects Add-ons User Mar	nagement Issues Dystem	Audit Log	
ATLASSIAN MARKETPLACE	Tempo Global Permis	sions	
Find new add-ons Manage add-ons	JIRA Administrators can ma	nage all Tempo global permissions. Here, you can view and change a	available permissions and the groups assigned to them.
Purchased add-ons	Permission	Description	Groups
APPLICATION LINKS Application Links	Tempo Administrator	Permission to administrate Tempo (JRA Administrators implied)	🔔 jira-administrators 🔔 tempo-administrator
BOURCE CONTROL	Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied)	A pra-administrators A team-managers
DVCS Accounts FishEye Configuration	Tempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	A tempo-time-tracking
Andreas (All Internation			
TEMPO			
Global Configuration			

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)

Tempo Global Permiss	sions			C
JIRA Administrators can mar	rage all Tempo global permissions. Here, you can view and change a	valiable permissions and the groups assigned to them.		
Permission	Description	Groups		
Tempo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	 jra-administrators tempo-administrator 		
Tempo Team Manager	Permission to manage Teams (Depends on Browse Users	(jira-administrators ×) [team-managers ×) jira	Update Cancel	
	Global Permission and JIRA Administrators are implied)	Showing 2 of 2 matching groups		
Tempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	Jira-developers		
	must have one permanenty	jira-users		

i Note, all users with the Manage Teams permission, also require the JIRA Browse Users Glob al Permission.

Teams custom field

Tempo Permissions

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

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, a nd select Fields > Custom Fields (left tabs).

V 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.
 - **1** Note, this doesn't require any configuration of the field out of the box.

Team field

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

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

In this chapter

Required permission

JIRA Administrators permission

Procedure

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

screen. Then scroll down to $\ensuremath{\text{Tempo Teams}}$ administration left tabs and choose the $\ensuremath{\text{Team}}$ $\ensuremath{\text{Field}}$ option.

W 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.
- 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)

Administration as	earch JIRA admin	Q
Projects Add-ons User Man	egement Issues System AuditLog	
ATLASSIAN MARKETPLACE Find new add-ons Manage add-ons	Team Field On this page you can edit the name of the Team Field Field Name: Team 📌	
Purchased add-ons APPLICATION LINKS Application Links	Change Field Name	
SOURCE CONTROL DVCS Accounts FishEye Configuration	Field Name Team Change Cancel	
Perforce Job Jeterco Keo		
Team Roles Team Field		

Team roles

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

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: ¹) at the top right of your screen. Then scroll down to **Tempo Teams** administration left tabs and choose the **Team Roles** option.
 - V 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)

On	this page
	Add Team Role Edit Team Role

rojects Add-ons User Mar	agement Issues System Audit Log			
ATLASSIAN MARKETPLACE	Team Roles On this page you can add new Team Roles or configure existing roles			
Find new add-ons	On this page you can add new Team Holes or configure existing roles			
Manage add-ons Purchased add-ons	Name			
APPLICATION LINKS	System Architect	Add		
Application Links	Member	Default		
SOURCE CONTROL	Business Analyst	Delete	· Set Default	
DVCS Accounts FishEye Configuration	Designer	Delete	· Set Default	
Perforce Job Integration	Developer	Delete	Set Default	
BUILDS	Product Owner	Delete	· Set Default	
Bamboo configuration	Scrum Master	Delete	· Set Default	
JIRA AGILE JIRA Agile Configuration	Technical Writer	Delete	Set Default	
Project Templates	Tester	Delete	· Set Default	
Enabled Projects				
the second se	The data do not which a state of the ball of the state of	and a subsection of the sub-		

Edit Team Role

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

Name	
	Add
Member	Default
Business Analyst	Delete · Set Default
Designer	Update Cancel
Developer	Delete · Set Default

- 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) versio	
n: 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)

MY TEAMS « GreenCloud Management	Teams						Create Team
	Member: All - Lead: All -	Program: All +	Contains Text	Q, Search		Overvie	w Manage
	Name	Lead	Program		Summary		
	Custom Web Development	Erica Jefferson	GreenCloud Consulting		Custom Web	Development Tea	m
	GreenCloud Azome	Erica Jefferson	GreenCloud Product Dew	siopment	Develop Azon	ne game app	
	GreenCloud Management	John Steel	Greencloud Operation		The GreenCk	ud Management	Team
	GreenCloud Tango	Robert Penn	GreenCloud Product Dev	elopment	Tango Produc	t Development Te	sam
	GreenCloud Wikkkieea	Erica Jefferson			Cloud Produc	t Development Te	am
	Marketing	Tara Fiynn	nn Greencloud Operation GreenC		GreenCloud's	Marketing Team	
	Service & Support	Laura Penn	GreenCloud Consulting		Service desk	and bugmasters	

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

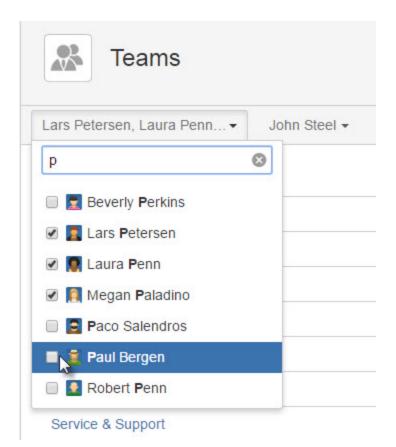
On the filter menu bar, in the search field, type text that you want to search for, and press Enter. Teams that contain the text in one or more of the fields of the team are listed.

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) versio n: 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)



1. Team tabs	2. Header menus	3. The team's Mission	4. Team Links	6. People in the team 5. Planning Agenda	7. Navigation			
Teams - / GC Product D Azome Web Der	evelopment			an e ran e regar rana	Team Planning Time Tracking Reports -			
Overview Reports Configuratio	n							
Summary	Summary This team is using all Tempo products.			Agenda • A2 - Azone Project Iteration Councert 1 Story and 8 other Issues remaining (9) • A2-68 As a site visitor, I can do a	5 days lot. (RECOMPANY) 119 full-text search of article body. (Covers stores) (III)			
	Mission To work on the Azome product suite.	I		* * #42-377 Design for being able to do a full-text search of an article <u>Articles and Ra.</u> * * #42-379 implement those and to being able to do a full-text search (<u>Articles and Ra.</u> * * #42-379 implement tacks and for being able to do a full-text search (<u>Articles and Ra.</u> * * * Vestor Database update for being able to do a full-text search (<u>Articles and Ra.</u> * * Vestor Database update for being able to do a full-text search (<u>Articles and Ra.</u> * * Vestor Database update for being able to do a full-text search (<u>Articles and Ra.</u>				
	Team Links	AKA Control S						
	Yengen Setural Propal (B) Andread Road	En Preset		A cycle Waters A cycle A cycle A cycle A cycle A cycle A cyc	Erica Jufferson Twei Laff & Sovie Masier (1955) Twei Self & Sovie Masier (1955) Twei Typen Twei Typen Twei Typen Dennaur (1955)			

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).
	i 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. <i>Select a browser</i>
	Teams / GC Product Teams Accounts Boards
	Select a new team
	Teams * / GC Product Development Azome Web Dev & Overvier Bearch Westgewardt Summ Marketing New Team Service & Support Team Wakeea Web Development
	Note the <i>GC Product Devlopment</i> link next to those menus, which opens the program the team belongs to.

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

6.	The People section displays all the members of the team, e.g. their name, Roles and Availability. The names are sorted alphabetically from left to right and then down the page. The lead of the team is displayed, either just as Team Lead or Team Lead & other role + xx%, with her/his title shown in bold letters.
	 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 <i>will join Azome Web Dev - Nov 24, 2014</i>). When a JIRA user has been created for the new hire, the names can be mapped
	together. The Tempo Team Timesheet does only show active memberships at any given date range. This means for example that user Bob Johnson, who is joining Team Tango during April, will only be displayed in the Team Timesheet during that month.
7.	 The Team tab/button refreshes the current page. If Tempo Planner is installed a Planning t ab/button is displayed. Click on the button to open the Planner Timeline. If Tempo Timesheets is installed, a Time Tracking tab/button is displayed to open the Team Timesheet for the team. The Reports drop-down has the same options, as detailed on the Team Reports page.

Creating teams

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

Тір

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) versio n: 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) versio n: 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.

Tempo Timesheets 8.0 Documentation

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) versio n: 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) versio n: 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 ¹² 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) versio n: 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) versio n: 2.x.x

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

Тір

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) versio n: 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) versio n: 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) versio n: 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) ver sion: 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.

U 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 i mported accounts. The status can also be set by manual configuration, given the account has previously had another status.
CLOSED	Accounts can only get this status by manual configuration.

ARCHIVED	 This status is used for the following import cases: An existing account (created manually or by import) is not in an import file and has no project link (and is not global). Existing imported accounts, that are not in the next version of the import file. Accounts can also be <i>Archived</i> 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.

1 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: <i>Clear Account value when issue is moved between projects</i> . 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.

U 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.

Associating to Screens

Screenshot: JIRA Custom Fields page - click to enlarge

Administration	9. Search JRA admin				ų
Projects Issues User ma	nagement System Add-ons				
ISSUE TYPES	Custom Fields		+ Add Custom Field	B Find More Custom Field	0
Issue Type Schemes	Name	Type	Available Context(s)	Screens	
Sub-Tasks	Account Locxes Tempo Account system field	Tempo Accounts Custom Field	Issue type(s): Global (all issues)	Default Screen View	B
WORKPLOWS Workflows	Account [deprecated, this field is no longer being used] Temps Account Identifier	Tempo Account	Issue type(s): Global (all issues)	Screens	
Workflow Schemes	Business Value Measurement of business value of a requirement,	Number Field	Issue type(s):		٥-
Screens Screen Schemes	Epic Colour LOCKED Epic Color field for JINA Agile use only.	Color of Epic	Issue type(4):		٥-
Issue Type Screen Schemes	Epic Link LOCKED Choose an epic to assign this issue to.	Epic Link Relationship	Issue type(4): Global (all issues)	Default Screen	٥-
PELDS	Epic Name LOCKED Provide a short-name to identify this epic in the JRA Agile boards.	Name of Epic	Issue type(s):	Default Screen	٥-
Custom Fields Field Configurations	Epic Status (LOCKED) Epic Status field for JIFA Agile use only.	Status of Epic	Issue type(4):		٥-
Field Configuration Schemes	Epic/Theme Field that will help you regroup issues under an Epic or under a theme.	Labels	Issue type(s): Global (all issues)		٥-

- 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).
- **W** 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) ver sion: 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:

- 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)

Related pages

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

• Manage Rates

Tempo Global Permissi	ions	
On this page you can edit the	e Tempo global permissions. Note that JIRA Administrators can mana	ge all Tempo global permissions
Permission	Description	Groups
Tempo Administrator	Permission to administrate Tempo (JIRA Administrators implied)	a jira-administrators
Tempo Team Manager	Permission to manage Teams (Depends on Browse Users Global Permission and JIRA Administrators are implied)	A jira-administrators A team-managers
Tempo Time Tracking	Permission to access Tempo time tracking (Tempo users must have this permission)	A tempo-time-tracking
Tempo Account Manager	Permission to manage Accounts (Tempo Administrators implied)	a 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)	a 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)	a tempo-time-tracking			
Tempo Account Manager	Permission to manage Accounts (Tempo Administrators implied)	ac Upd	late		
		Showing 2 of 2 matching groups			
Tempo Rate Manager	Permission to manage Price Rates	account-managers			
		tempo-time-tracking			

The Manage Accounts permission is automatically granted to Tempo Administrators.

Accounts configuration

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

V Tip: Use Keyboard Shortcut instead: g then g and start typing Accounts Configuration.

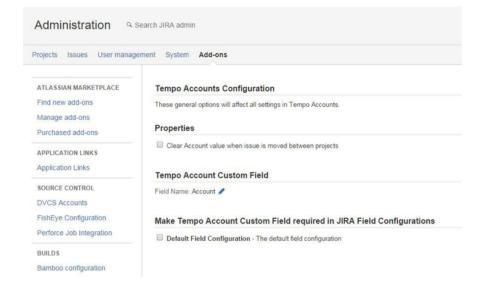
The Tempo Accounts Configuration screen (click to enlarge)

On this page

- Clear Accounts from JIRA Issues
 - Tempo Account
 - Custom Field Name
 - Make Account Required

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 m oved 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: " <i>W</i> <i>arning: Account not in project</i> " 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) ver sion: 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.

Accessing the accounts navigator

Click Tempo > ACCOUNTS more.

The accounts navigator (click to enlarge)

BROWSE « Teams	E	Accoun	its						Give Temp	o Feedback Create Account
Accounts Accounts Open and Closed Led by Me	Lead	All - Calegor	y : All • Type : All • Customer : All • Open,Clo	osed - Project : Al	I • Price Table : All •	Contains text Q			Ov	erview Reports • Manage •
	۸	There are unacc	ounted hours to review. Review unaccounted hours.							
Archived	1 - 21	of 21								
MAINTENANCE	т	Key	Name -	Lead	Category	Customer	Contact	Status	Projects	Price Table
Global	•	201405	AKA Control Development (Billed by the hour)	Lars Petersen	Billable	AKA Control System	Ian McDougal	OPEN	AKA Control System	Tempo Default Price Table
Unassigned Project Unassigned Customer		201406	AKA Control: Service Contract	Laura Penn	Service Contracts	AKA Control System	Ian McDougal	OPEN	AKA Control System	Tempo Default Price Table
Uncategorized Accounts	G	201635	Azome Game App Development	Michael Cruz	Development	GreenCloud		OPEN	Azome	Tempo Default Price Table
	0	201401	Cloudbay: Development (Billed by the hour)	Erica Jefferson	Billable	CloudBay	John Brown	OPEN	Paradigm Cloud	Tempo Default Price Table
	8	201402	Cloudbay. Service Contract	Erica Jefferson	Service Contracts	CloudBay	John Brown	OPEN	Paradigm Cloud	Tempo Default Price Table
		201407	GreenCloud: Internal	John Steel	Internal Cost	GreenCloud	John Steel	OPEN	Internal	Tempo Default Price Table
	•	201408	GreenCloud: Management	John Steel	Management Cost	GreenCloud	John Steel	OPEN	GreenCloud Management Internal	Tempo Default Price Table

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

• Accessing the

- accounts navigator • Creating an
- account
- Filtering the list of accounts
- Sorting the list of accounts
- Reviewing a list of
- unaccounted hours
- Viewing the list of customers
- Viewing lists of account and expense categories
- Viewing hourly rates
- Importing and exporting
- account data
 Exporting worklogs as a PDF file

Accounts	Ģg	Give T
Lead : All + Category : All + Type : All + Customer : All + Open, Closed + Project : All +	Price Table : All	
There are 2,636.00 logged hours unaccounted for on 15 issues. Review unaccounted hours.	Price Table Q	
There are a power on agging interpolation of the locates include an analysis of the locates of t	Ministry of Health Price Table	<u> </u>
1 - 20 of 20 T Key Name - Lead Category Custom	 Tempo Default Price Table Springfield City Rates 	rojec

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.

↓ Give	Tempo Feedb	ack	Crea	te Account
Contains text Q	Overview	Repor	ts •	Manage
		Custon	ners	
		Catego Import		ort Accounts
		Unacco	ounted	d Hours
t Status Proje	ects	Price T	ables	

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) ver sion: 2.x.x

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

(i) 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.

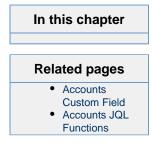
To start the process of creating an account, click on the **Create Account** button in the top right corner of the Accounts Navigator.

The Create Account button in the Accounts Navigator

Search	٩	• (?)	* *	2-
Give Temp	o Feedback	Сг	eate Ac	count
		Overvie	w Ma	nage 🔹

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)



Name*	Spring Development	
Key*	SPRINGDEVE	
	A unique key for the account	
Lead*	I Erica Jefferson	
	Person managing the account	
Customer	Springfield City - (100359)	•
Contact	Iars Petersen	
	Person representing the customer	
Category	Development - (300)	-

Create

Cancel

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 <i>JIRA username</i> or simply a typed <i>name</i> :
	 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 <i>Development</i> or <i>Market</i> <i>ing</i> .

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

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

Configuring accounts

Extract from **Tempo Accounts** (plug-in) ver sion: 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 **L inks**. Given that the user has already chosen an account, click on the **Configuration** tab for the account, to access these functions - see the first screenshot below.

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)

Accounts - AKA Cont	rol: Development	÷			In this chapter
Overview Configuratio	n				•
General	Configure Acco	unt	¢	•	Related pages
Links Budget	Key	201405			Accounts Custom Field
Price Table	Name*	AKA Control: Development			Accounts JQI Functions
	Status*	Open	•		
	Lead*	Lars Petersen			
		Person managing the account			
	Customer	AKA Control System - (100450)	-		
	Contact	Ian McDougal			
		Person representing the customer			
	Category	Development - (300)	-		
		Update			

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*.

 Configuring an account
 Linking account to JIRA projects
 Adding a monthly budget to an account
 Configuring price table
 In this chapter
 Related pages
 Accounts Custom Field
 Accounts JQL

On this page

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)

Accounts -	velonment -				ort Feed	
AKA Control: De			Account	Time Track	ing B	ludg
verview Configuration						
General	Account Links ()					
Links	Link to the appropriate JIRA Projects to be able to ke	ep track of work on this account.				
Budget	Project					
Price Table		+ Link			4	¢
	Recent Projects					
	Wikkkiesa Cloud (WIKK)				Delete	lin
	Service and Support (SUPPORT)					
	Azome (AL)					
Atlass	 Tango OnDemand (TO) 	391cc) · About JIRA · Report a	a problem			
	Internal (INT)	use only.				
	(9) Web Development Projects (WDP)					

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

Accounts * AKA Cont	rol: Development (Billed by the hour) -	
verview Configuratio	'n	
General	Account Price Table ①	
ludget	Account Discount Rate 0 % Apply	
rice Table	All hourly rates are discounted by this percentage, for this account only.	
	Tempo Default Price Table [USED BY 19 ACCOUNTS]	Tempo Default Price Table *
	Team Role	Hourly Rate (\$)
	Default Rate	120.00
	Business Analyst	140.00
	Designer	150.00
	Developer	180.00
	Marketing	120.00
	Member	120.00
	Product Owner	190.00
	Scrum Master	190.00
	Senior Developer	120.00

Linking accounts to projects

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

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

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

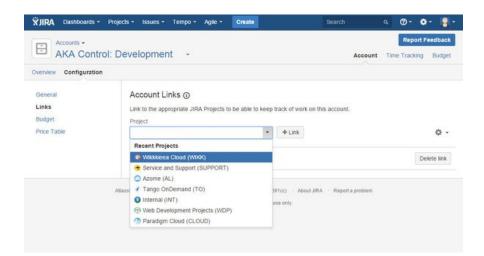
Users with Manage Accounts permission can link accounts to projects in the Links page displayed in Account Configuration for the selected account.

The Links page in Accounts Configuration

On this page

- Link on Create
- In Accounts
- Configuration
- In Project Administration

In this chapter



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

verview Administratio	N		
Summary ssue Types - Bug - Epic	Accounts Link to the appropriate account in Tempo to keep track of work of Account + Link Link	n this project.	
 Improvement Story Technical task 	Wikkkieea Cloud CAPEX (201403)	SET DEFAULT	Delete link
Vorkflows	Wikkkieea Cloud OPEX (201404)	DEFAULT ACCOUNT	Delete link
Screens Fields	Wikkkieea Salesforce Connector (201459)	DEFAULT ACCOUNT	Delete link

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) ver sion: 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

□ Give	Give Tempo Feedback				e Account
	Overv	iew	Reports	s *	Manage 🏠
			Custome	ers	
			Categori	es	
Contact	Status	Pro	re Import / Export Accour		rt Accounts
Ian McDougal	OPEN	AK	Price Tal	ble	

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)

Accounts		Give Tempo Feedback Create Account
		Overview Manage
ustomers		
counts can be grouped by customer fi	for accounting or other management purposes.	
Key	Name	
100500	Parliament of Utopia	Add
100450	AKA Control System	Delete View Customer
100450		Delete View Gastoniet
	CloudBay	Delete View Customer
100201	CloudBay GreenCloud	
100201		Delete View Customer

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

AKA Cont	rol System -
verview Configuration	
Summary	Summary Customer Name: AKA Control System / Customer Key: 100450 Accounts Development AKA Control: Development Lars Petersen
	Service and Maint

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

Delete	iew Customer

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

	Delete View Customer
Delete cu	stomer: 'Cloud Bay Inc'
-	ure you want to delete this customer? G: This operation cannot be undone
	Cancel

Categorizing accounts

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

Give Tempo Feedb	back	Creat	te Account
	Over	view	Manage •
	Custome	rs	
	Categori	es	N
1	Import /	Export	Accounts
1	Price Tal	ble	

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)

Accounts	3		Give T	empo Feedback Create Account
				Overview Manage *
Manage Categorie				
	eful when you want to classify different accounts, e.g. I			
Key		Туре	_	
312	Operational Cost		*	Add
310	Billable	Billable Capitalized		Delete
300	Development.	Internal Operational		Delete
450	Internal Cost	Internal	3	Delete
460	Management Cost	Capitalized		Delete

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.

Туре

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:

	Туре	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) ver sion: 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 **Impo rt / Export Accounts** option from the Manage drop-down menu.

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

In this chapter

Rep	ort feedba	ack	Creat	te Account
		Ov	erview	Manage -
		Cust	omers	
			gories	
Status	Project	Impo	ort / Expo	ort Accounts
OPEN	AKA C	ontrol	System	

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)

Accounts	Report feedback Create Account
	Overview Manage -
Import / Export Accounts	
Move account data between Tempo and some external system or application.	
There are currently 15 open accounts (View)	
Import Accounts	
Using CSV File	Using XML from service
You can import accounts from a CSV file exported from a spreadsheet, created in a text editor etc. in which case an import wizard will guide you through a few necessary steps. Atternatively you can import accounts using the Tempo Accounts Template (download template) CSV file.	Import accounts from a service by wrapping the data into an XML file. The structure of the XML file can by found in the Tempo Documentation.
Import Custom CSV Import Template CSV	Import from Service
Export Accounts	
Accounts are exported in the Tempo Accounts Template CSV format.	
Export Accounts	

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) ver sion: 2.x.x

Account Statuses

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

In this chapter

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 reportsAll 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 i n 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

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

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

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:

lidation	0
dd or edit worklogs in Tempo on a specific date.	
selected, then current user is used. When testing if admin can log work for other user add admin username, add Issue Key to test for Issue permission.	
12/Feb/13	
Paul Bergen (paul)	
•	
	dd or edit worklogs in Tempo on a specific date. selected, then current user is used. When testing if admin can log work for other user add admin username. dd Issue Key to test for Issue permission. 12/Feb/13 Paul Bergen (paul)

Validate

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	0	Editable
Username	Ī	Paul Bergen (paul)
User is Admin		No
Period status for 0213	0	Open
Date too far into future (360 Days)	0	No
Tempo Scheduler		Disabled
Timesheet Workflow		Weekly
Workflow status	0	Open
User timesheet status		Open
lssue		WIKK-11: Valid
Internal Issue		No
Allow logging on not editable issues	0	Yes
Issue editable	0	Editable
User can edit Issue	0	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

• 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.

Access Control		(?
Enter all IP-addresses that are a	allowed to access Tempo services	
Enter IP-addresses or IP-addres	s range in a white space separated list.	
Example: 127.0.0.1 192.168.1.10-192.168.1.20 ::fff:192.168.0.1 fe80:0000:0000:0000:0202:b3ff.fe	e1e:8329-fe80::202:b3ff.fe1e:8888	
Allowed addresses	127.0.0.1 ::##.192.168.0.1	

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.

1. 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&temp oApiToken=my-token

Security token that must be added to all API calls. URL parameter to add: &tempoApiToken=7d5a3d58-f3e9-455d-9503-7da80c396bc1

Security token	7d5a3d58-f3e9-455d-9503-7da80c396bc1
	Save

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.

ons User management System			
icense Details			
This page shows your current Tempo licensing information.			
empo Timesheets - 7.16.5			
Licensed to:	Tempo		
Date Purchased:	13/Apr/16		
License Type:	COMMERCIAL		
	(Support and updates available until 12/Apr/17)		
Support Entitlement Number (SEN):	SEN-		
JIRA Version:	7.0.4 (COMMERCIAL)		
Tempo Help:	https://tempoplugin.jira.com/wiki/		
Plugin Version Details			
• Tempo Timesheets - 7.16.5 ENABLE	D		
Tempo Planner - 3.3.1 ENABLED			
Tempo Folio - 10.3.1 ENABLED			
 Tempo Books - 1.3.2 ENABLED System Plugin: Tempo Planning API 	- 3.2.1 ENABLED		
 System Plugin: Tempo Planning APT System Plugin: Tempo Accounts - 1.1 			
System Plugin: Tempo Accounts - 1.8.2 ENABLED System Plugin: Tempo Teams - 2.7.1 ENABLED			
e jeterni i ragin. Ternipe reante 2.1.1			

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 Atlas sian Universal Plugin Manager (UPM).

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.

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

In this chapter

In this chapter

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 The perspective role: JIRA Administrators Release notes for the Tempo Planning API This is the Tempo Planning API plugin. It handles creating, reading, updating and · Upgrading the deleting plan items made through other Tempo Products. Tempo Planning API is thus Tempo a shared point for Tempo Products to manipulate and share planning data. Disabling Planning API or removing it will have consequential effects and should not be done unless Shared instructed to do so by Tempo's support team, or unless you are uninstalling Tempo. Planning Data Manage add-ons screen with the Tempo Planning API system plugin (click to enlarge) Granting permission to users Manage add-ons REST API You can install, update, enable, and disable add-ons here. Find new add-ons. guide for the Tempo User-installed -Filter visible add-ons ∓ Upload add-on + Build a new add-on Planning API User-installed add-ons > 🎄 Atlassian Universal Plugin Manager Plugin > 🎄 FishEye Plugin > 🏘 HipChat for JIRA 🗧 🙀 JIRA Agile 🔉 💠 JIRA iCalendar Plugin JIRA Importers Plugin (JIM) > 🎄 JIRA Welcome Plugin > 📀 System Plugin: Tempo Core System Plugin: Tempo Planning API This is the Tempo Planning API plugin. Other Tempo products depend on this plugin. Please do not disable or uninstall it unless instructed to do so by Tempo's support team, or unless you are uninstalling Tempo. Uninstall Disable

API for Tempo Timesheets

Tempo REST API

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.

In this chapter

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

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

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.

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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

Related pages

Tempo REST
API's
Timesheets

REST API

In this chapter

Related pages

- 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:

Attributes Tempo Dynamic Drop-downs External

On this page

Worklog

- Service -JSONP web service
- Request Parameters
- Scripts
- Worklog
- Attributes
- Example
- Select List

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** fie Id.

The second script is executed when the **Activity** drop-down is changed. This script assumes that the **Activity** value is of the form **activityId|priceCodeld|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 = jOuery(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.

		og Attributes attributes can be added to t	the worklogs.						
n ex	amp	le of a worklog attribute is	simple true/false values such a	s "Overtime", "Not Billable" and	*Driving	cost" or mor	e complex Dynamic Drop-downs that are populated by a JSONP so	ript.	
eed	tocu	mentation for details.							
hes	e att	ributes are stored as a key	value pair with worklogs.						
New	Clic	k here to add expenditur	e item as worklog attribute						
		Name	Key	Туре	Order	Required	External URL		
	ŧ	Billable	_Billable_	CHECKBOX	0	false		1	¢
1	ł	Billing key	_Billingkey_	DYNAMIC_DROP_DOWN	1	true	/rest/tempo-rest/1.0/accounts/json/billingKeyList/[IssueKey]	1	•
1	1	Activity	_Activity_	DYNAMIC_DROP_DOWN	2	true	https://myserver/jsonp/activities/[_BillingKey_}	1	•
T.	1	Price Code	_PriceCode_	DYNAMIC_DROP_DOWN	3	true	https://myserver/jsonp/pricecodes/	1	•
1	1	Account Indicator	_AccountIndicator_	DYNAMIC_DROP_DOWN	4	false	https://myserver/jsonp/rejectioncodes/	1	e
1		ActivityScript	ActivityScript	SCRIPT	5	false	https://myserver//js/activities.js	1	e

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

Log Work - Erica	Jefferson	
Issue	Issue:	DEV-4
Internal	Period	
Activity	Date:	01/Apr/11
	Hours worked:	Total hours spent: 2
	Remaining estimate:	15 Original estimate: 17
	Description:	
	Billable	V
	Billing key	201401 - Customer A: Development
	Activity	Please Select
	Price Code	Please Select
	Account Indicator	Please Select
		Add Add and close Cance

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

Issue	Issue:	Staff Sickness Hours 💌
Internal	Period	
Activity	Date:	29/Mar/11
	Hours worked:	8
	Description:	My face was red today
	Туре	Please Select
		Please Select Red
		Yellow Green 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.

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. (i) 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. (i) 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

On this page

- Tempo servlets manual
 - GetWorklogs
- UpdateWorklo
- gs • WorklogReport
- BillingKeyList
- HolidayList

In this chapter

Related pages

- iii. diffOnly returns only records that have changed since last update (Updat eWorklogs) or are marked as external error (external_result is not OK)
- e. errorsOnly=true|false(default)
 - 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 **billingK** ey and activity
- g. addBillingInfo=true|false(default)
 - i. Adds billing info to each worklog
- h. addlssueSummary=true|false(default)
 - i. Adds issue summary field to each worklog
- i. addlssueDetails=true|false(default)
 - 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
- I. headerOnly=true|false(default)
 - i. Returns only header information (no data). Used to see the current "open period".
- m. userName=userName
 - 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. addlssueDescription=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>dc11dffc091fcc72e7358067a9488fale31ce314</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>dc11dffc091fcc72e7358067a9488fale31ce314</hash_value>
</worklog_update>
</worklog_update>
```

3. Output example:

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

1 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

Ś

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

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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.

(i) 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 perm ission is needed to see work logged by other users. The timesheet is also available in report and lis t 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

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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 re port and list view.

Tempo Administrator

The **Tempo Administrator** is a **Permission**, that needs to be given by JIRA Administrators to **sele cted 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 Proje ct, 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 **sel ected 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.