

FIRST STEPS

If you are using **ictime** the first time, this chapter of our documentation should help you to understand some concepts of **ictime**. However, you do not need to perform all these steps in this order and can do and modify settings at any time.



If after successful installation of ictime, you do not see any **ictime** menu in the JIRA navigation bar, first have a look here: [Check Permission Setup](#)

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1. General Configuration




This configuration screen is located in the administration section of JIRA and can be accessed by **all JIRA administrators**. All other administration/configuration options are accessible via the **ictime** navigation in the JIRA navigation bar. Access depends on **ictime** permissions (see below, [Permissions](#)).

As a first step, review the general settings for **ictime** and decide if the default configuration is okay for you (most **ictime** features are enabled). If you decide to deactivate features, you can skip some of the following steps.

Navigate to the Add-ons section in the JIRA administration and go to "Manage add-ons". Select **ictime** in the list of add-ons and click on the "Configure" button. Alternatively, use the ictime menu in the JIRA navigation bar, click on "Administration" and then on "General Configuration".

ictime - General Configuration

 If you are new to ictime, please have a look at [First Steps](#). Should you not be able to see any ictime navigation items after installation, this is most probably a JIRA group configuration issue (ictime uses JIRA default groups for creating initial permissions). Please find how to solve this here: [Ictime Permissions](#)


Here, you can define global settings for ictime. Recurring administration options can be found here: [Administration](#)

Available Time Tracking Options	<div>Both "From-to" and "Time spent" options ▾</div>
Time Tracking Strict Mode	<div>None ▾</div>
Option to Correct "Time Spent" Value	<div><input checked="" type="radio"/> Enabled <input type="radio"/> Disabled</div>
Require Teams & Price Lists to Log Work	<div><input checked="" type="radio"/> Enabled <input type="radio"/> Disabled</div>
Approval Settings	<div>Warning ▾</div>
"No Charge" Option	<div><input checked="" type="radio"/> Enabled <input type="radio"/> Disabled</div>
Detailed "Remaining Estimate" Option	<div><input checked="" type="radio"/> Enabled <input type="radio"/> Disabled</div>
JIRA's Default "Log Work" Form	<div>Allow ▾</div> <p>If you choose disallow, it won't be possible to use JIRA's default "Log Work" mask. This is the recommended setting. In addition, you should hide JIRA's "Log Work" action. For more information on this topic, refer to the documentation.</p>
ictime Database Version	<div><input type="text" value="7"/></div> <p>Changing the ictime database version is usually not required/recommended</p>
Status	<div>databaseVersion : 7</div>

Update

Cancel

Make the changes you need and save.

 Read the detailed documentation here: [General Configuration](#)

2.Disable JIRA's "Log Work" Screen

ictime adds it's own, separate "Log Work (ictime)" dialogue, in addition to the existing one from JIRA. In order to avoid confusion arising from having **two different screens to log work** - one from **ictime**, one from JIRA - you can proceed like described by Atlassian here: <https://confluence.atlassian.com/pages/viewpage.action?pageId=715129243>. You can do technically the same via the following two options on the general configuration screen of **ictime** (see [General Configuration](#)):

ictime can't replace JIRA's "Log Work" option, but adds a second "Log Work (ictime)" option. To avoid confusion, we recommend hiding JIRA's default "Log Work" option completely. For more information on this topic, refer to the [documentation](#).

Current status: **Enabled**

Hide JIRA's "Log Work" action

ictime adds a "Work Log (ictime)" tab to the issue screen. To avoid confusion, you can hide JIRA's original "Work Log" tab here. For more information on this topic, refer to the [documentation](#).

Current status: **Enabled**

Hide JIRA's "Work Log" tab panel

We recommend that you disable/hide JIRA's "Log Work" action as well as JIRA's "Work Log" tab.



Please note: If you disable JIRA's "Log Work" action as well as JIRA's "Work Log" tab and later on disable or uninstall **ictime** (or trial expires), you will no longer be able to enable JIRA's "Log Work" action as well as JIRA's "Work Log" tab via **ictime**. In this case, please refer to Atlassian's instructions here <https://confluence.atlassian.com/pages/viewpage.action?pageId=715129243> (but just do the opposite!) or see [General Configuration](#) and [FAQ / Known Issues](#).



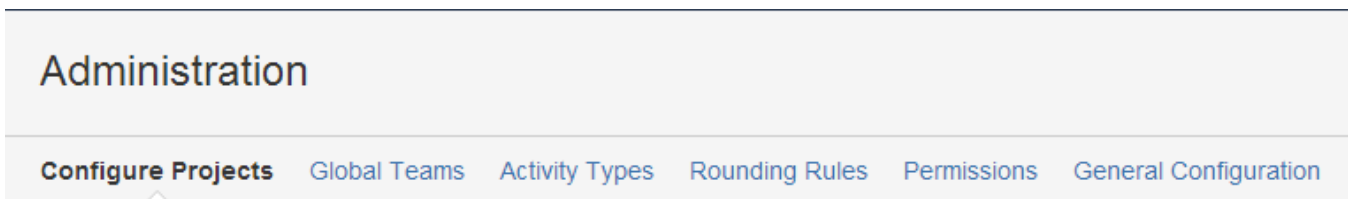
Read the detailed documentation here: [General Configuration](#)

3. Administration

All administration & configuration options of **ictime** that are used more frequently are accessible via the "Administration" link in the **ictime** menu in the JIRA navigation bar (you do not have to switch to JIRA administration mode).

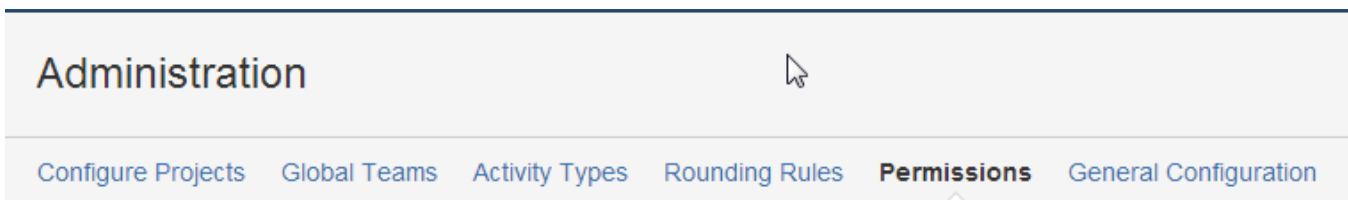


ictime's administration section is divided into a couple of subitems that are described in the following chapters:



Permissions

You find the permissions in the **ictime** administration menu:



ictime permissions are configured based on JIRA groups. **ictime** ships with a default permission setup that grants members of the **jira-administrators** group full access to all **ictime** features and gives members of the **jira-developers** group access to a few features like timesheets etc. You should check if the initial permission setup has been automatically performed (= as member of the "jira-administrators" group, you can see all **ictime** navigation items), and if yes, review the permission setup and change it according to your needs.



There are a couple of scenarios where the default permission setup of **ictime** does not work, i.e. you won't be able to access all **ictime** navigation items (or even won't see any **ictime** navigation menu in the JIRA navigation bar at all):

1. If the JIRA groups **jira-developers** and **jira-administrators** did **not exist** in your **JIRA installation** at the time of installation if **ictime** (it does not help to create them after installation of **ictime**!)
2. If your **user is not assigned** to one of this groups (specifically to jira-administrators in order to have full access to **ictime** administration options)
3. If something fails when creating the initial permission setup on installation in your JIRA database and no permissions are created or permissions are only partly created.

In these cases proceed according to one of the following recommendations:

1. If the JIRA **groups did not exist at the time you installed ictime**, create a new group in JIRA with the name **"ictime-lifesaver"**. Assign yourself to this group. You will now get access to the **ictime** "Permissions" screen and can set the permissions in accordance with your needs.
2. If the JIRA groups exist, but **you are not assigned**, assign yourself to the group "jira-administrators", if possible.
3. If your JIRA group configuration looks okay but something seems to have failed on initial creation of permissions, proceed like described under #1, i.e. create and use the "ictime-lifesaver" group.



Read the detailed documentation here: [ictime Permissions](#)

Activity Types

Activity types are an (optional) feature to further classify your work logs. If you want to use this feature, just create the activity types you need and they will be available for all your projects (you will also be able to disable or limit activity types to selected ones on a per project base). You find the activity types in the **ictime** administration menu:

Administration

[Configure Projects](#)[Global Teams](#)[Activity Types](#)[Rounding Rules](#)[Permissions](#)[General Configuration](#)

You also have the option to completely deactivate activity types here (don't skip this step if you are sure that you don't need activity types, but deactivate them now).

Activity Types

Create activity type

☐ Do not use activity types

Name	Description	
Activity I		
Another One		
Brainstorming		
Consulting		



Read the detailed documentation here: [Activity Types](#) and [Project Activity Types](#).

Rounding Rules

If you have projects where you want to track time exactly as a time-span (with start/end time), but do not want to charge your clients the exact amount of time, but a rounded amount (like 15 minutes, 30 minutes etc.), you can define rounding rules. All rules you have defined will be available on project level. You find the rounding rules in the **ictime** administration menu:

Administration

[Configure Projects](#) [Global Teams](#) [Activity Types](#) **[Rounding Rules](#)** [Permissions](#) [General Configuration](#)

Rounding Rules

Create rounding rule

Name	Minimum Unit	Round up	Enabled	
Default 5/6 auf 15	15	6		
5/6-30	30	6		
Test	15	6		

If you don't need rounding at this moment, just skip this step.

Read the detailed documentation here: [Rounding Rules](#).

Global Teams & Price Lists

ictime allows you to control who is able to log work via teams; and via price lists, you can set rates for the work of team members. You have the choice whether you want to work with global teams and price lists that can be assigned to specific projects or if you want to create your teams and price lists for each project (you also can mix both approaches). You find the global teams and price lists in the **ictime** administration menu:

Administration

[Configure Projects](#) **[Global Teams](#)** [Activity Types](#) [Rounding Rules](#) [Permissions](#) [General Configuration](#)

Global Teams

Create New Team

Name	Description	Users	Price Lists	Projects
Global Team One Edit			Create price list Test PL 01 (06.12.2013 - 20.12.2013) Edit	ABC ABC Project 2 Edit teams GHJ GHJ WS Edit teams
Global Team Three Edit		Stefan Demo (stefan)	Create price list	<input type="checkbox"/> Edit teams AIC Interconcept AIC Edit teams ITI JIRA Plugin IT Edit teams
Global Team Two Edit		Tobias Test (tobias)	Create price list GT2 - PL (01.04.2014 - 31.07.2014) Edit	<input type="checkbox"/> Edit teams

You can skip this step if you have decided to globally deactivate team & price list checks in the add-on configuration (see step 1, [Add-on Configuration](#)).

Read the detailed documentation here: [Global Teams & Price Lists](#).

5. Configure Projects

You find the project configuration in the *ictime* administration menu:

Administration

Configure Projects

Global Teams

Activity Types

Rounding Rules




Permissions

General Configuration

Configure Projects

Projects: All

This list displays all JIRA projects with ictime status "active" or "inactive" or without ictime status.

Project	Status	Teams & Price Lists	Currency	Rounding Rule	Activity Types
 ABC Project 2 (ABC) Edit	active Edit	Global Team One * My test team PM (Standard 01.03.2012 - 30.06.2015) Programmer	EUR Edit	Default 5/6 auf 15 Edit	Activity I Another One Brainstorming more... Edit
 DEF Project MV (DEF) Edit	active Edit	Design PM Programmer Test Test 2 Test Team A	--- Edit	Default 5/6 auf 15 Edit	Another One Consulting Design & Usability more... Edit
 GHJ WS (GHJ) Edit	active Edit	Design Global Team One *	EUR Edit	--- Edit	All Edit

Project configuration contains different configuration options for each project. Click on one project ("Edit") to see all those options:

Configure Projects

Global Teams

Activity Types

Rounding Rules

Permissions

General Configuration

Project Status

[Teams & Price Lists](#)

[Rounding Rule](#)

[Accounting References](#)

[Currency](#)

[Activity Types](#)

[Approval Managers](#)

[Configure Projects](#)

Project Status: ABC Project 2

The ictime project status defines visibility of a project in ictime and time tracking permissions.

Status:

active

Save

Set a project status (to be able to deactivate or close projects for time tracking).

Configure Projects

Global Teams

Activity Types

Rounding Rules

Permissions

General Configuration

Project Status

Teams & Price Lists

Rounding Rule

Accounting References

Currency

Activity Types

Approval Managers

Configure Projects

Project Status: ABC Project 2

The ictime project status defines visibility of a project in ictime and time tracking permissions.

Status: active

Save

Create project-specific teams and price lists (to control who can log work and to price your work) or assign one or more global teams (if you have decided to create global teams & price lists in step 5, see [Configure Global Teams & Price Lists](#)).





Teams & Price Lists : ABC Project 2

☐ Do not require Team & Price List assignment of users to log work for this project

Project-Specific Teams & Price Lists


Here you can create project-specific teams and price lists for these teams. Project-specific teams and price lists are only available for this project. Instead of - or in addition to - project-specific teams and price lists, you can select one or more global team/s below, if applicable.

Create New Team

Name	Description	Users	Price Lists
My test team Edit		 Tobias Test (tobias)	<div>Create price list</div> <div>test team pl (01.02.2014 - 30.06.2014) Edit</div>
PM Edit		 Reinhard Test (reinhard)	<div>Create price list</div> <div>Standard (01.03.2012 - 30.06.2015) Edit</div>
Programmer Edit		 Test Zugang (test)  Tim Test (tim)	<div>Create price list</div> <div>Programmer (01.04.2012 - 31.07.2013) Edit</div>

Global Teams

Here you can choose on or more global teams (including price list/s) for your project. You can do this alternatively or in addition to creating project-specific teams and price lists above.

Name	Description	Users	Price Lists	Assigned
Global Team One			Test PL 01 (06.12.2013 - 20.12.2013)	<input checked="" type="checkbox"/>
Global Team Three		 Stefan Demo (stefan)		<input type="checkbox"/>

Select a rounding rule (if you have decided to create rounding rules in step 4, see [Rounding Rules](#)).

Rounding Rule : ABC Project 2

Here you can choose a rounding rule for your project.

Name	Minimum Unit	Round up	Enabled
Default 5/6 auf 15	15	6	

Rounding Rule:

Define accounting references, e.g. for your exports.

Accounting References : ABC Project 2

Here you can define accounting data that will be added when exporting a report.

Customer:

Account:

Accounting
Reference 1:

Accounting
Reference 2:

Accounting
Reference 3:

Set a project currency (for your reports).

Currency : ABC Project 2

Here you can define a currency for your project.

Currency:

Select those activity types you want to use for this project (if you have decided to work with activity types in step 3, see [Activity Types](#)) or just use all.

Activity Types : ABC Project 2

Activity type configuration for this project

- ☐ Use all existing activity types
- ☐ Do not use activity types
- ☒ Select specific activity types

Not assigned

Assigned

Activity I
Another One
Brainstorming
Consulting
Design & Usability

Define one or more approval managers (in case you have activated approval in the [General Configuration](#)).

Approval Managers : ABC Project 2

Here you define one or more user/s who can approve work logs for this project (approval managers). They automatically get all permissions required to perform the approval process in the Reporting section of ictime.

Assign users


User:

Full reporting permissions: ☐

Unassign users


Current approval managers:

Most of this is optional, the only thing you need to do (if you did not decide to globally deactivate team & price list checks in step 1, see [General Configuration](#)) is creating teams and price lists (or assigning a global team if you have created one or more in step 5, see [Configure Global Teams & Price Lists](#)).

 Read the detailed documentation here: [Project Configuration](#)

6. Do you need to log work on other screens?

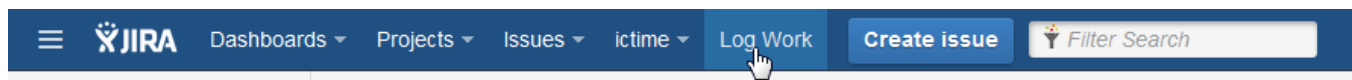
Sometimes it makes sense to offer the option to log work not only as a separate feature, but also integrated into other screens, i.e. usually **workflow transition screens** (like resolve, close). For this, you need to replace the original JIRA "Log Work" field with a custom "Log Work ictime" field - if you don't do that and go on using the original JIRA field, you will be able to log work on such screens, but without any of the additional **itime** features.

 Read the detailed documentation here: [Custom Log Work Field for ictime](#).

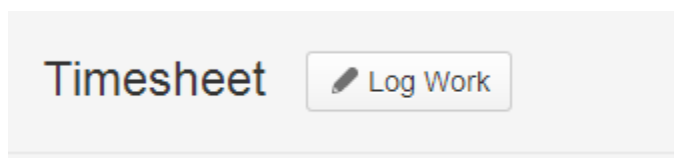
7. Log Work


Once you have configured **itime** and your projects according to your needs, users can start to log work. Apart from the options JIRA offers to log work (e.g. from the issue screen or in operations menus e.g. from dashboard gadgets or in the issue navigator) **itime** offers additional options where you can log work (also depending on permission configuration):

Via the JIRA navigation:



Via your timesheet:



 Read the detailed documentation here: [Log Work](#)

8. My Timesheet

Once you have started to log work, your timesheet is a central place to manage your existing work logs. You just get there via the **ictime** navigation:

ictime ▾

Log Work

Create issue

Filter Search

Timesheets

Timesheet

Recent Work Logs

Details

★

Timesheet

Log Work

Issue

Projects: ABC Project 2 (ABC... ▾

Components: All ▾

Versions: All ▾

24.06.2014

31.07.2014

Users: Tobias Test (tobias) ▾

Activity Types: All ▾

Status: All ▾

Approval: All ▾

Search

▼ Timesheet

List

Structured

Date Grid

Date	Project		Issue	Components	Activity	Description	User	Begin
07.07.2014	DEF		DEF-3 Beispiel - Summary10...	Component 10202	Project Management	planung11642	Tobias Test	-
07.07.2014	DEF		DEF-3 Beispiel - Summary10...	Component 10202	Project Management	besprechun11643	Tobias Test	-
06.07.2014	DEF		DEF-3 Beispiel - Summary10...	Component 10202	Project Management	review let11641	Tobias Test	-
05.07.2014	DEF		DEF-3 Beispiel - Summary10...	Component 10202	Project Management	diverse be11640	Tobias Test	-

Read the detailed documentation here: [Timesheet](#)

9. Reporting & Accounting

Once you have started to use **ictime** for logging work, administrative users can manage work logs of all users via the reporting options of **ictime**, from running reports, editing or moving work logs to approval, exporting data, charging work logs etc. You get there via the **ictime** navigation:

ictime ▾

Log Work

Create issue

Timesheets

Timesheet

Recent Work Logs

→ ABC-80 design issues with i...

→ ABC-79 specification of new...

→ ABC-79 review, test plan

→ ABC-79 tested the applicati...

→ ABC-81 work logged on sub-t...

more...

Reporting & Accounting

Reporting

Accounting

Reporting

Filter

Issue

Projects: ABC Project 2 (ABC) ▾

Components: All ▾

Versions: All ▾

Teams: All ▾

From

To

Users: All ▾

Activity Types: All ▾

Issue Status: All ▾

Approval: All ▾

Accounting: not charged ▾

☐ Prepare Charging Work Logs

Create Report

✓ Read the detailed documentation here: [Reporting](#) and [Accounting](#).

10. Custom Reports

If you are running **ictime** >=5.8.2 you may want to test Custom Reports which are based on Jasper Reports. **ictime** ships with Custom Reports examples for all databases which are supported by Jira.

Please navigate to **ictime** / Administration /Custom Reports and click "Install Samples". You will end up with a screen similar to this one (available fonts depending on your installation):

11. Time & Date Settings in JIRA?

JIRA has a rather confusing way of defining time & date settings for different purposes at different places. Even though misconfigurations frequently do not cause visible trouble in JIRA, **ictime** - due to the fact that time & date is essential for work logs - might show problems (error messages or time is not calculated correctly when using start/end time etc.) if settings are not okay. Please have a quick look at [Time & Date Settings](#).

12. Operating in Different Timezones?

Even though **ictime** relies on JIRA data structures for work logs, there is a **fundamental difference** in how JIRA and **ictime** save work logs timestamps when a user has a different timezone setting compared to the server. If you are operating with users with different timezone settings and/or a server timezone settings that is different from user's timezone settings, please have a detailed look here (especially if you already have logged work before in JIRA): [Timezone Issues](#)