Documentation

TimeAccounting

A Time Registration Module. Version 6.0.15 Edition

Build Date:

2020-01-24

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Preface

TimeAccounting module extends OTRS framework enabling the track of time that agents spend on different tasks, vacations, overtime and sick leaves.

If you have questions regarding this document or if you need further information, please log in to our customer portal at portal.otrs.com with your OTRS ID and create a ticket. You do not have an OTRS ID yet? Register here for free.

Chapter 1. Feature List

1. Time Accounting Overview

It displays for the current logged user a summary of its own working hours per day (month based), vacation days summary, sick leave days, and the distribution of its working hours on each project and tasks.

2. Time Accounting Edit

Allows to set working hours, vacation, sick leaves and overtime leaves on a day basis. The working hours can be set by defining the start and the end dates, or a period of time.

The working hours can be registered per project and task. Pre-filled selection lists are used to speedup the register process and prevent typos.

3. Time Accounting Reporting

Designed for administrators and managers, shows a monthly based timing information summary for each registered user (working hours, overtime leave, sick leave and vacations), as well as timing information summary for each project and tasks (the time spend on each).

4. Time Accounting Settings

Also designed for administrators and managers, it allows the creation of multiple projects and tasks. It also enables the assignment of the users defining their working calendar, working periods (begin date, end date, number of vacation days, hours per week and allowed overtime hours).

5. Time Accounting Statistics

A new statistics type has been added to show working hours based on projects or users.

6. Time Accounting Notification

A notification reminder for agents to insert their working hours (can be configured in SysConfig to define the maximum days without entry to display the notification).

7. Toolbar Shortcut For Days Without Time Accounting Entry

A counter displaying the number of days without registering the working hours can be set in the upper part of the screen (similar to Locked tickets counter or Responsible tickets counter). When clicking on the icon, agents are redirected to the Time Accounting Edit screen, to fill the missing records.

8. Time Accounting Registration Enforcement

Configurable by a SysConfig setting, the system can be blocked, not allowing to perform any actions, if a certain number of days without time accounting registers has been passed (agents are redirected to Time Accounting Edit screen to fill the missing records).

9. Exclusion of Time Accounting Registration Enforcement

The enforcement of logging accounted time can be disabled on a per-user base. If the checkbox 'User is allowed to skip time accounting' is checked in the time accounting settings for this user, the user can use the full functionality of the time accounting but logging time will be completely optional. This feature may be used for cases where users are only supposed to log times irregularily or for a part of their working time.

10. Mass Entries

Disabled by default, this feature allows agents to set special time accounting information (such as: on vacation, overtime leaves and sick leave) to multiple days at the same time.

Chapter 2. System Requirements

1. Framework

The following OTRS framework is required:

- 6.0.26

2. Packages

The following packages are required:

- None

3. Operating System

This package requires one of the following operating systems:

- None

4. Third Party Software

This third party software is required to use this package:

- None.

Chapter 3. Installation

The following instructions explain how to install the package.

After having successfully completed the installation, please follow the instructions provided in the chapter "First steps".

1. Admin Interface

Please use the following URL to install the package utilizing the Admin Interface (please note that you need to be in the "admin" group).

http://localhost/otrs/index.pl?Action=AdminPackageManager

2. Command Line

Whenever you cannot use the Admin Interface for whatever reason, you may use the following command line tool ("bin/otrs.Console.pl Admin::Package::Install") instead.

```
shell> bin/otrs.Console.pl Admin::Package::Install /path/to/TimeAccounting-6.0.15.opm
```

Chapter 4. Configuration

The package can be configured via the SysConfig in the Admin Interface. The following configuration options are available:

1. **Frontend::Module###AgentTimeAccountingEdit.**

   Navigation: Frontend::Agent::ModuleRegistration.

   Frontend module registration for the agent interface.

2. **Frontend::Module###AgentTimeAccountingOverview.**

   Navigation: Frontend::Agent::ModuleRegistration.

   Frontend module registration for the agent interface.

3. **Frontend::Module###AgentTimeAccountingReporting.**

   Navigation: Frontend::Agent::ModuleRegistration.

   Frontend module registration for the agent interface.

4. **Frontend::Module###AgentTimeAccountingSetting.**

   Navigation: Frontend::Agent::ModuleRegistration.

   Frontend module registration for the agent interface.

5. **Frontend::Module###AgentTimeAccountingView.**

   Navigation: Frontend::Agent::ModuleRegistration.

   Frontend module registration for the agent interface.

6. **Frontend::Navigation###AgentTimeAccountingEdit###002-TimeAccounting.**

   Navigation: Frontend::Agent::ModuleRegistration::MainMenu.

   Main menu item registration.

7. **Frontend::Navigation###AgentTimeAccountingOverview###002-TimeAccounting.**

   Navigation: Frontend::Agent::ModuleRegistration::MainMenu.

   Main menu item registration.

8. **Frontend::Navigation###AgentTimeAccountingReporting###002-TimeAccounting.**

   Navigation: Frontend::Agent::ModuleRegistration::MainMenu.

   Main menu item registration.

9. **Frontend::Navigation###AgentTimeAccountingSetting###002-TimeAccounting.**

   Navigation: Frontend::Agent::ModuleRegistration::MainMenu.

Main menu item registration.

10. Frontend::Navigation###AgentTimeAccount-ingView###002-TimeAccounting.

Navigation: Frontend::Agent::ModuleRegistration::MainMenu.

Main menu item registration.

11. Frontend::NotifyModule###888-TimeAccounting.

Navigation: Frontend::Agent::FrontendNotification.

This notification module gives a warning if there are too many incomplete working days.

12. Frontend::ToolBarModule###201-TimeAccounting::Incomplete-WorkingDays.

Navigation: Frontend::Agent::ToolBar.

Agent interface notification module to see the number of incomplete working days for the user.

13. Loader::Module::AgentTimeAccountingEdit###002-TimeAccounting.

Navigation: Frontend::Agent::ModuleRegistration::Loader.

Loader module registration for the agent interface.

14. Loader::Module::AgentTimeAccountingOverview###002-TimeAccounting.

Navigation: Frontend::Agent::ModuleRegistration::Loader.

Loader module registration for the agent interface.

15. Loader::Module::AgentTimeAccountingReport-ing###002-TimeAccounting.

Navigation: Frontend::Agent::ModuleRegistration::Loader.

Loader module registration for the agent interface.

16. Loader::Module::AgentTimeAccountingSetting###002-TimeAccounting.

Navigation: Frontend::Agent::ModuleRegistration::Loader.

Loader module registration for the agent interface.

17. Loader::Module::AgentTimeAccountingView###002-TimeAccounting.

Navigation: Frontend::Agent::ModuleRegistration::Loader.

Loader module registration for the agent interface.

18. PreApplicationModule###AgentTimeAccounting.

Navigation: Frontend::Base::PreApplicationModule.

This module forces inserts in TimeAccounting.

19. Stats::DynamicObjectRegistration###TimeAccounting.

Navigation: Core::Stats.

Determines if the statistics module may generate time accounting information.

20. TimeAccounting::ActionListConstraints.

Navigation: Frontend::Agent::View::TimeAccountingEdit.

Regular expressions for constraining action list according to selected project. Key contains regular expression for project(s), content contains regular expressions for action(s).

21. TimeAccounting::ActiveFilter.

Navigation: Frontend::Agent::View::TimeAccountingEdit.

If enabled, the filter for the previous projects is active by default if there are the previous projects. It could be used only if EnableAutoCompletion and TimeAccounting::UseFilter are enabled.

22. TimeAccounting::AllowMassEntryForUser.

Navigation: Frontend::Agent::View::TimeAccountingEdit.

If enabled, the user is allowed to enter "on vacation leave", "on sick leave" and "on overtime leave" to multiple dates at once.

23. TimeAccounting::DefaultActionName.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default name for new actions.

24. TimeAccounting::DefaultActionStatus.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default status for new actions.

25. TimeAccounting::DefaultProjectName.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default name for new projects.

26. TimeAccounting::DefaultProjectStatus.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default status for new projects.

27. TimeAccounting::DefaultUserDateEnd.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default setting for date end.

28. TimeAccounting::DefaultUserDateStart.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default setting for date start.

29. TimeAccounting::DefaultUserDescription.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default setting for description.

30. TimeAccounting::DefaultUserLeaveDays.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default setting for leave days.

31. TimeAccounting::DefaultUserOvertime.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default setting for overtime.

32. TimeAccounting::DefaultUserStatus.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default status for new users.

33. TimeAccounting::DefaultUserWeeklyHours.

Navigation: Frontend::Agent::View::TimeAccountingSetting.

Default setting for the standard weekly hours.

34. TimeAccounting::EnableAutoCompletion.

Navigation: Frontend::Agent::View::TimeAccountingEdit.

If enabled, the dropdown elements in the edit screen are changed to modernized autocompletion fields.

35. TimeAccounting::Frontend::ReportingProject###ShowOnlyActiveUsers.

Navigation: Core::TimeAccounting::ViewReportingProject.

If enabled, only users that has added working time to the selected project are shown.

36. TimeAccounting::InputHoursWithoutStartEndTime.

Navigation: Frontend::Agent::View::TimeAccountingEdit.

Specifies if working hours can be inserted without start and end times.

37. TimeAccounting::MaxAllowedInsertDays.

Navigation: Core::TimeAccounting.

For how many days ago you can insert working units.

38. TimeAccounting::MaxIntervalOfIncompleteDays.

Navigation: Core::TimeAccounting.

Maximum number of working days after which the working units have to be inserted.

39. TimeAccounting::MaxIntervalOfIncompleteDaysBeforeWarning.

Navigation: Core::TimeAccounting.

Maximum number of working days without working units entry after which a warning will be shown.

40. TimeAccounting::Project2RemarkRegExp.

Navigation: Frontend::Agent::View::TimeAccountingEdit.

Defines the projects for which a remark is required. If the RegExp matches on the project, you have to insert a remark too. The RegExp use the smx parameter.

41. TimeAccounting::ProjectListConstraints.

Navigation: Frontend::Agent::View::TimeAccountingEdit.

Regular expressions for constraining project list according to user groups. Key contains regular expression for project(s), content contains comma separated list of groups.

42. TimeAccounting::ReduceTime.

Navigation: Frontend::Agent::View::TimeAccountingEdit.

To use if some actions reduced the working hours (for example, if only half of the traveling time is paid Key => traveling; Content => 50).

43. TimeAccounting::UseFilter.

Navigation: Frontend::Agent::View::TimeAccountingEdit.

If enabled, the filter for the previous projects can be used instead two list of projects (last and all ones). It could be used only if TimeAccounting::EnableAutoCompletion is enabled.

Chapter 5. Usage

This package is shipped with a default configuration where all agents can access to their personal overview (Time Accounting Overview) and working hours registration (Time Accounting Edit) screens, while only users from the "admin" group has access to the settings and reporting screens. This can be changed in frontend module registration of specific screens by setting Group and GroupRo keys.

Note

For some features users must be added to the time accounting feature from the time accounting settings screen and have a valid time span.

1. Create A New Project

This example shows how to create a new project to register working hours on.

Note

For this and following examples a user with "rw" in "admin" group is needed.

1. From Time Accounting menu choose "Settings".

2. Click on "Add Project" from the Actions list in the sidebar, located in the left part of the screen.

3. In the new screen fill the name of the project and a description if needed (make sure that status is set to "valid").

4. Click on "Submit" button.

5. After the redirect to the main Settings window, notice that the new project appears in the project list in the center of the screen.

Note

Optionally register more projects, repeating the same steps.

2. Create A New Task

This example shows how to create a new task to register working hours on.

Note

Tasks are available to all projects.

1. From Time Accounting menu choose "Settings".

2. Click on "Add Task" from the Actions list in the sidebar, located in the left part of the screen.

3. In the new screen fill the name of the task (make sure that status is set to "valid").

4. Click on "Submit" button.

5. After the redirect to the main Settings window, notice that the new task appears in the task list in the center of the screen.

Note

Optionally register more tasks, repeating the same steps.

3. Add a User

This example shows how to add an agent to the time accounting.

1. From Time Accounting menu choose "Settings".

2. Select a user from the Actions list in the sidebar, located in the left part of the screen.

3. Click on "New user".

4. In the new screen fill the comments if needed.

5. For this example we will leave unchecked "Show Overtime", "Allow project creation" and "Allow time accounting skipping" and we will use the default calendar.

6. In the period table choose a near date for "Period Begin" (otherwise the user will have to fill several time accounting records, due to the enforcement policy).

7. Optionally change the "Period End" and leave all other columns with the defaults (for this example).

8. Click on "Submit" button.

9. After the redirect to the main Settings window, notice that the new user appears in the user list in the center of the screen.

4. Register Your Working Hours

This example shows how to register the working hours in time accounting.

Note

A previously added user to time accounting is needed for this example.

1. Login to OTRS with a proper user.

2. From Time Accounting menu choose "Edit".

3. Navigate to the desired date by using the left and right arrows in the "Date Navigation" widget located in the sidebar, at the left part of the screen (navigation is automatic by clicking the arrows). Alternatively a date can be defined with the controls below. Click on "Submit" button within the widget to go to the selected date.

4. Select a project and task in the first row of the table in the central part of the screen.

5. Type a comment in the "Remarks" column.

6. Now fill the working hours. It can be done by setting the "Start" and "End" times in "HH:MM" format or register the period of time in the proper column.

Example 5.1. Setting Working Hours For Two And A Half Hours

Lets think that the working hours took place from 11:00 AM to 01:30 PM. Set 11:00 for the "Start" column and 13:30 for the "End" column, or alternatively to this, just set 2.5 (two and a half hours) in the "Period" column.

7. After setting working hours in one or more rows, make sure the "Total" (in the table footer) has the expected value, the sum of all working hours. Then click on "Submit" button on the lower part of the screen.

Chapter 6. File List

This list shows all included files and the referring permissions.

- (660) doc/timeaccounting-database.png
- (660) Kernel/Config/Files/XML/TimeAccounting.xml
- (660) Kernel/Language/bg_TimeAccounting.pm
- (660) Kernel/Language/da_TimeAccounting.pm
- (660) Kernel/Language/de_TimeAccounting.pm
- (660) Kernel/Language/es_MX_TimeAccounting.pm
- (660) Kernel/Language/es_TimeAccounting.pm
- (660) Kernel/Language/fr_TimeAccounting.pm
- (660) Kernel/Language/gl_TimeAccounting.pm
- (660) Kernel/Language/hu_TimeAccounting.pm
- (660) Kernel/Language/id_TimeAccounting.pm
- (660) Kernel/Language/it_TimeAccounting.pm
- (660) Kernel/Language/ja_TimeAccounting.pm
- (660) Kernel/Language/mk_TimeAccounting.pm
- (660) Kernel/Language/ms_TimeAccounting.pm
- (660) Kernel/Language/nb_NO_TimeAccounting.pm
- (660) Kernel/Language/nl_TimeAccounting.pm
- (660) Kernel/Language/pl_TimeAccounting.pm
- (660) Kernel/Language/pt_BR_TimeAccounting.pm
- (660) Kernel/Language/pt_TimeAccounting.pm
- (660) Kernel/Language/ro_TimeAccounting.pm
- (660) Kernel/Language/ru_TimeAccounting.pm
- (660) Kernel/Language/sr_Cyrl_TimeAccounting.pm
- (660) Kernel/Language/sr_Latn_TimeAccounting.pm
- (660) Kernel/Language/sv_TimeAccounting.pm
- (660) Kernel/Language/sw_TimeAccounting.pm
- (660) Kernel/Language/uk_TimeAccounting.pm
- (660) Kernel/Language/vi_VN_TimeAccounting.pm

- (660) Kernel/Language/zh_CN_TimeAccounting.pm

- (660) Kernel/Language/zh_TW_TimeAccounting.pm

- (660) Kernel/Modules/AgentTimeAccountingEdit.pm

- (660) Kernel/Modules/AgentTimeAccountingOverview.pm

- (660) Kernel/Modules/AgentTimeAccountingReporting.pm

- (660) Kernel/Modules/AgentTimeAccountingSetting.pm

- (660) Kernel/Modules/AgentTimeAccountingView.pm

- (660) Kernel/Output/HTML/Templates/Standard/AgentTimeAccountingDelete.tt

- (660) Kernel/Output/HTML/Templates/Standard/AgentTimeAccountingEdit.tt

- (660) Kernel/Output/HTML/Templates/Standard/AgentTimeAccountingOverview.tt

- (660) Kernel/Output/HTML/Templates/Standard/AgentTimeAccountingReporting.tt

- (660) Kernel/Output/HTML/Templates/Standard/AgentTimeAccountingReportingProject.tt

- (660) Kernel/Output/HTML/Templates/Standard/AgentTimeAccountingSetting.tt

- (660) Kernel/Output/HTML/Templates/Standard/AgentTimeAccountingView.tt

- (660) Kernel/Output/HTML/Notification/TimeAccounting.pm

- (660) Kernel/Output/HTML/ToolBar/IncompleteWorkingDays.pm

- (660) Kernel/Output/JavaScript/Templates/Standard/Agent/TimeAccounting/Option.html.tmpl

- (660) Kernel/Output/JavaScript/Templates/Standard/Agent/TimeAccounting/Dialog/AjaxLoader.html.tmpl

- (660) Kernel/System/TimeAccounting.pm

- (660) Kernel/System/Stats/Dynamic/TimeAccounting.pm

- (660) scripts/test/TimeAccounting/DayOfWeekToName.t

- (660) scripts/test/TimeAccounting/UpgradeLowerThan5092.t

- (660) scripts/test/TimeAccounting/UserReportingDateCheck.t

- (660) scripts/test/TimeAccounting/VacationCheck.t

- (660) scripts/test/TimeAccounting.t

- (660) scripts/test/Selenium/Agent/AgentTimeAccountingEdit.t

- (660) scripts/test/Selenium/Agent/AgentTimeAccountingOverview.t

- (660) scripts/test/Selenium/Agent/AgentTimeAccountingReporting.t

- (660) scripts/test/Selenium/Agent/AgentTimeAccountingSetting.t

- (660) scripts/test/Selenium/Agent/AgentTimeAccountingView.t

- (660) scripts/test/Selenium/Output/Notification/TimeAccounting.t

- (660) scripts/test/Selenium/Output/ToolBar/IncompleteWorkingDays.t

- (660) var/httpd/htdocs/js/TimeAccounting.Agent.js

- (660) var/httpd/htdocs/js/TimeAccounting.Agent.ConfirmationDialog.js

- (660) var/httpd/htdocs/js/TimeAccounting.Agent.EditTimeRecords.js

- (660) var/httpd/htdocs/js/TimeAccounting.Agent.Overview.js

- (660) var/httpd/htdocs/js/TimeAccounting.Agent.Reporting.js

- (660) var/httpd/htdocs/js/TimeAccounting.Agent.View.js

- (660) var/httpd/htdocs/js/test/TimeAccounting.Agent.EditTimeRecords.UnitTest.html

- (660) var/httpd/htdocs/js/test/TimeAccounting.Agent.EditTimeRecords.UnitTest.js

- (660) var/httpd/htdocs/skins/Agent/default/css/TimeAccounting.Defaults.css

- (660) var/httpd/htdocs/skins/Agent/default/css/TimeAccounting.Table.css

- (660) var/packagesetup/TimeAccounting.pm

Chapter 7. Tests

This module has been tested on the current state of the art in quality.

1. Test Cases

To test this package please follow the examples described in the "Usage" section. All the tests cases should return the expected results defined at the beginning of each example.

2. Unit Tests

To ensure the quality of the module, several so-called unit tests were created, to test the functionalities of this module. These unit tests can be run via command line.

ATTENTION: Please never run unit tests on a productive system, since the added test data to the system will no longer be removed. Always use a test system.

Run the package specific unit tests

To run only the unit test which will be delivered with this package, use the following command on the command line:

```
shell> perl bin/otrs.Console.pl Dev::UnitTest::Run --test TimeAccounting
shell> perl bin/otrs.Console.pl Dev::UnitTest::Run --directory TimeAccounting
```

Selenium unit tests

To run the Selenium unit tests, make sure you have a complete Selenium environment setup in your Kernel/Config.pm file and a running a WebDriver.

```
shell> perl bin/otrs.Console.pl Dev::UnitTest::Run --test AgentTimeAccountingEdit
 --test AgentTimeAccountingOverview --test AgentTimeAccountingReporting --test
 AgentTimeAccountingSetting --test AgentTimeAccountingView
shell> perl bin/otrs.Console.pl Dev::UnitTest::Run --test Notification/TimeAccounting --test
 ToolBar/IncompleteWorkingDays
```

Run all available unit tests

To run all available unit tests, use the following command on the command line:

```
shell> perl bin/otrs.Console.pl Dev::UnitTest::Run
```

Chapter 8. ChangeLog

6.0.15 / 2020-01-24 18:01:13

- - Updated minimum framework version to OTRS 6.0.26. - Updated translations. - Updated jquery. - Updated copyright.

6.0.14 / 2019-09-20 17:03:36

- - Updated minimum framework version to OTRS 6.0.23.

6.0.13 / 2019-06-28 22:40:01

- - Updated minimum framework version to OTRS 6.0.20. - Updated translations. - Follow-up fix for bug#13466: Time spans will be saved implicitly.

6.0.12 / 2019-04-06 05:37:59

- - Updated framework files to OTRS 6.0.18. - Updated translations.

6.0.11 / 2019-02-23 18:43:01

- - Updated framework files to OTRS 6.0.17. - Follow-up fix for bug#14377. - Fixed: Check-boxes act as radio buttons and missing text from alert dialog (bug#14377). - Fixed: Web-server 500 Error when trying to put in hours into a weekend's day (bug#14354).

6.0.10 / 2019-01-15 01:37:31

- - Updated copyright. - Updated minimum framework version to 6.0.15.

6.0.9 / 2018-12-11 01:06:40

- - Code cleanup. - Updated minimum framework version to 6.0.13.

6.0.8 / 2018-11-05 17:00:42

- - Code cleanup. - Updated translations, thanks to all translators.

6.0.7 / 2018-09-28 17:26:01

- - Code cleanup.

6.0.6 / 2018-09-15 06:18:38

- - Updated translations, thanks to all translators. - Fixed: Time spans will be saved implicitly (bug#13466). - Updated license information.

6.0.5 / 2018-07-17 23:34:55

- - Updated translations, thanks to all translators. - Allow specific users to skip time accounting. - Updated Hungarian package description. - Fixed: Setting "Days of vacation" to value 0 not possible (bug#13467).

6.0.4 / 2018-04-24 20:08:03

• - Updated translations, thanks to all translators.

6.0.3 / 2018-02-07 00:53:03

• - Updated translations, thanks to all translators.

6.0.2 / 2017-12-12 23:43:43

• - Updated translations, thanks to all translators. - Improved display of DefaultUserDateStart and DefaultUserDateEnd settings. - Fixed bug13415 - Incomplete days widget has wrong day of week names.

6.0.1 / 2017-11-15 01:47:57

• - Updated documentation (Configuration chapter). - Updated translations, thanks to all translators.

5.0.92 / 2017-11-08 19:32:09

• - Updated translations, thanks to all translators. - Changed default group configuration and implemented migration path for existing systems. TimeAccounting specific user group will no longer be automatically created on new systems.

5.0.91 / 2017-10-23 05:16:10

• - Initial version for OTRS 6. - Updated translations, thanks to all translators. - Bug#12104 - TimeAccounting statistic silently returns only last full month unless Period filter is used.