Redmine – ERPmine
User Guide

Version 2.6
Dec 28, 2016

Revision History

Date	Version	Description	Author
05/28/2013	1.5	Initial Revision	T.Suganya
08/27/2013	1.6	Time & Expense 1.6 updates	T.Suganya
07/31/2014	1.7	Time & Expense 1.7 updates	T.Suganya
05/12/2015	1.8.1	Support for code hooks	T.Suganya
07/02/2015	1.9	Admin Groups, Empty status filter	T.Suganya
10/08/2015	2.0	Send reminder, User filters	T.Suganya
02/08/2016	2.1.1	Attendance, Reports	T.Suganya
03/30/2016	2.1.2	Termination date, Filters in Attendance and Reports	T.Suganya
06/25/2016	2.2	Configuration for Min/Max per week and user group of Non submission mail	T.Suganya
07/13/2016	2.2.1	Time & Expense report in report module. List page for users with view permission also.	T.Suganya
08/19/2016	2.3	File Based Integration with Attendance / Time Clock Device.	R.Dhineshkumar
09/29/2016	2.4	Payroll module is introduced.	R.Dhineshkumar
11/14/2016	2.5.2	Billing module is introduced	R.Dhineshkumar
12/28/2016	2.6	Accounting module is introduced	R.Dhineshkumar

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1. Introduction

The Time Entry feature of Redmine allows a user to enter against a Project Issue, this entry can be made one by one. The ERPmine plugin revamps the time entry feature to allow for weekly time entry in one screen. This plugin provides the capability to submit both Time & Expense in weekly format within Redmine. The user must be a member of a project with permission to log time. If the user has “Edit time logs” permission, then he can manage other team member's Time & Expense as well. Users without edit permissions cannot edit/delete time & expense entries. The time & expense sheets can be exported into pdf and csv format. The attendance module allows the user to clock in and clock out. T&E admin can manage other user’s attendance.The payroll module allows the user to view salary and user salary settings. T&E admin can manage other users 'salary components' and 'User salary settings'

1.1 Installation

Unpack the zip file to the plugins folder of Redmine. Starting from version 1.2, it requires db migration. So run the following command for db migration

rake redmine:plugins:migrate NAME=redmine_wktime RAILS_ENV=production

When uninstalling the plugin, be sure to remove the db changes by running

rake redmine:plugins:migrate NAME=redmine_wktime VERSION=0 RAILS_ENV=production

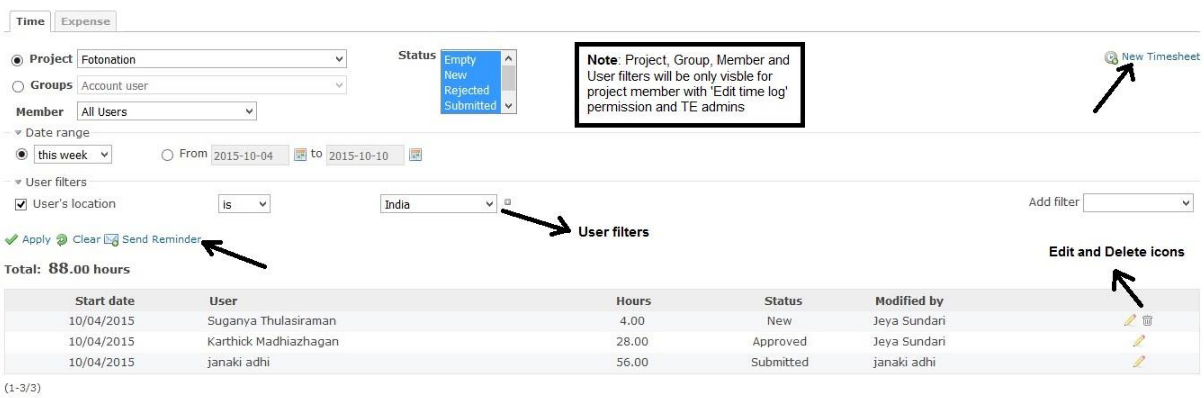
2. Time & Expense

2.1 Timesheet

Timesheet is used to log the spent time for projects by their members for a week. The member should have log time permission to fill out the timesheet.

2.1.1 Timesheet List

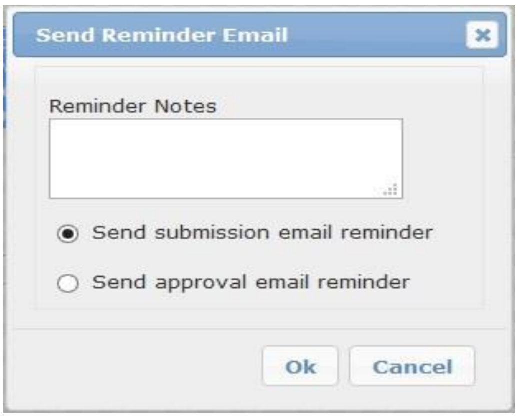
The list page by default displays the timesheets for the current month. Date range filters can be applied to the list page. The users with “Edit time logs” permission will have additional filters; project, member, group and status dropdowns. The list page displays the list of timesheets satisfying the filter criteria. The project/group dropdown is used for filtering the member dropdown. User custom fields which are marked as filters can also be used to filter time/expense sheets.



Note: Users who have edit permissions on all projects within a timesheet will be allowed to delete a timesheet from this list page.

2.1.2 Send Reminder

Manager and TE admins can send reminders to the user to submit and approve the time/expense sheet. The reminders will be sent based on the filtered time/expense sheet list. The submission reminder will be sent to the corresponding user and the approval reminder will be sent to the user’s manager.

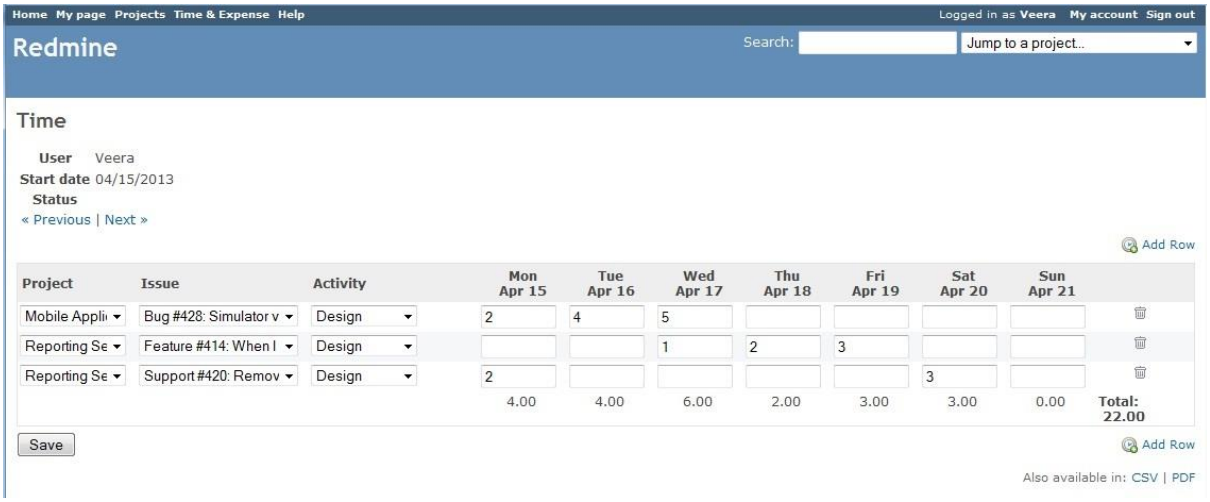


2.1.3 New timesheet

Here are the steps to add a new timesheet.

- Click on the top menu “ERPmine”,
- Select the tab “Time & Expense”
- Click on “New Timesheet” hyperlink
- Enter the start date of the week for the new timesheet and if previous week template is needed check the previous week template checkbox, else uncheck it
- Click “Continue” to create timesheet.

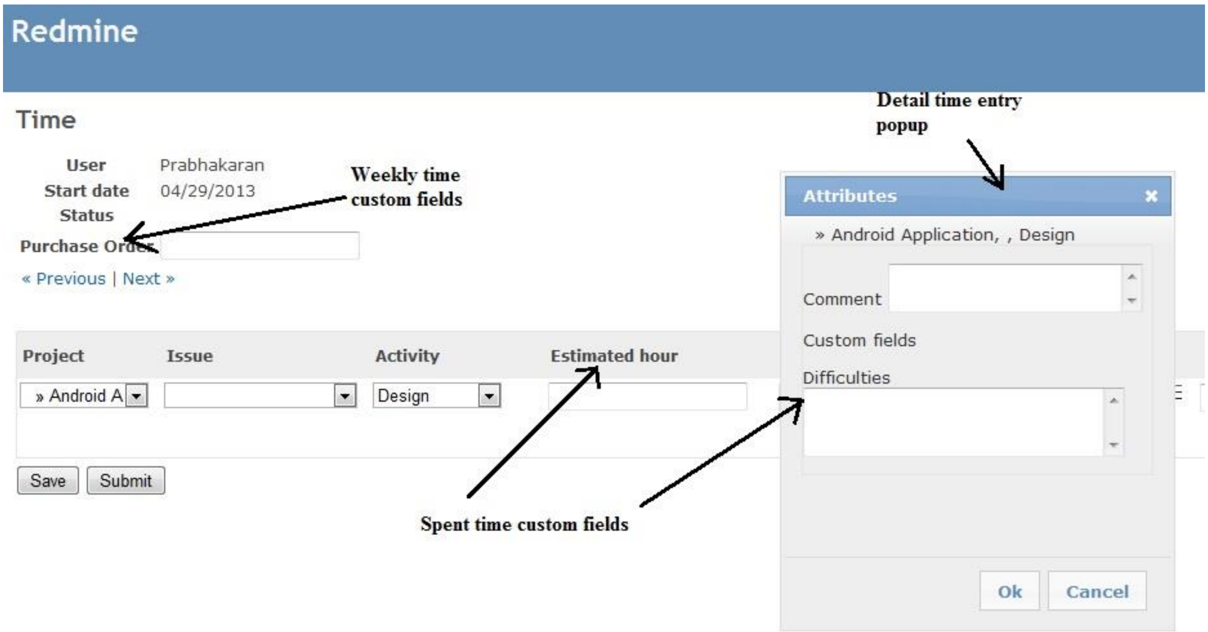
The screenshot represent the timesheet page. Using the “Add row” link, the user can enter new time entry. Choose the project, issue and activity from their respective dropdowns. Rows can be deleted using the delete icon at the end of the row.



The Previous and Next link helps the user to navigate to the previous and next week timesheet.

2.1.4 Custom fields

Custom fields can be added at the Timesheet level and also at the individual spent time level.



Administrators can create custom fields by navigating to Administration ➔ Custom fields menu ➔ New custom field link. To create individual spent time custom fields choose the "Spent time" option and for timesheet custom fields choose the "Weekly Time" option from the Custom fields page.

2.1.4.1 Spent time Custom Fields

The spent time custom fields are applicable to the individual cells within a timesheet; these are attributes of Spent Time entity. These custom fields can be configured for a row (discussed in section 6.5.7 and 6.5.8) instead of a cell and by default it will be shown in detail time entry popup (discussed in section 6.4).

2.1.4.2 Timesheet Custom Fields

These custom fields are applicable to the whole timesheet and are created from the Weekly Time tab from the Custom fields page. For e.g., the Purchase Order field applies to the whole timesheet.

2.2 Expense Sheet

Expense sheet is used to fill out the expenses incurred on various projects. It works same as the timesheet. In addition to project, issue and activity fields, it has the currency field as well. Even though different currencies can be used for different rows, the currency from the last row is used for the day total and week total. Custom fields are not available for Expense Sheet.

2.2.1 Expense Sheet List

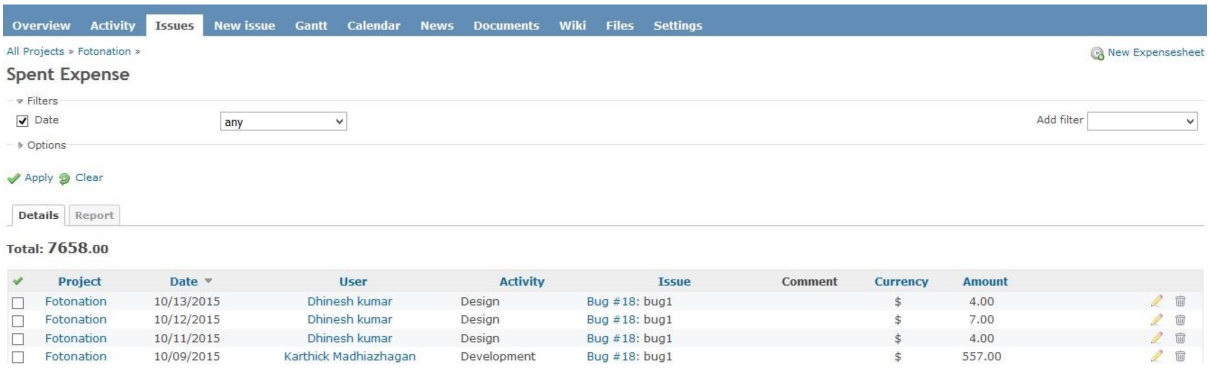
This page list the expense sheets based on the filter criteria chosen on the page. This page is similar to the timesheet list page described in section 2.1.

2.2.2 New Expense Sheet

The steps for adding a new expense sheet is same as that of the timesheet.

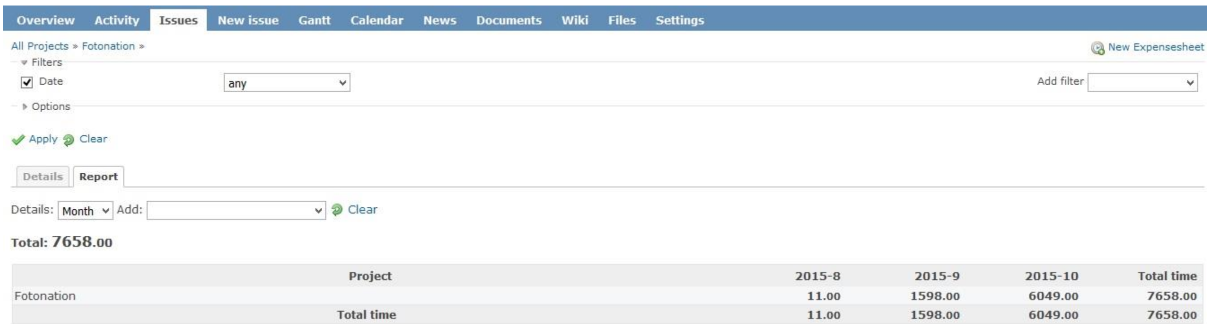
2.2.3 Detail and Report Page

The expense detail and report page resembles the spent time detail and report page of redmine.



The navigation for the expense Detail and Report page is Projects → Edit project → Expense Report. The project members with 'View Spent Time' permission have access to this page.

The details tab will list individual expense entries made for the project. We can edit and delete expense entries from here as well. The edit link will take the user to the corresponding expense sheet. Individual expense entries can be deleted from this page as well. The report tab can be used to summarize data at various levels; member, tracker etc.



2.3 Approval System

The ERPmine sheets can be approved / rejected by supervisors after it is submitted by Project Members.

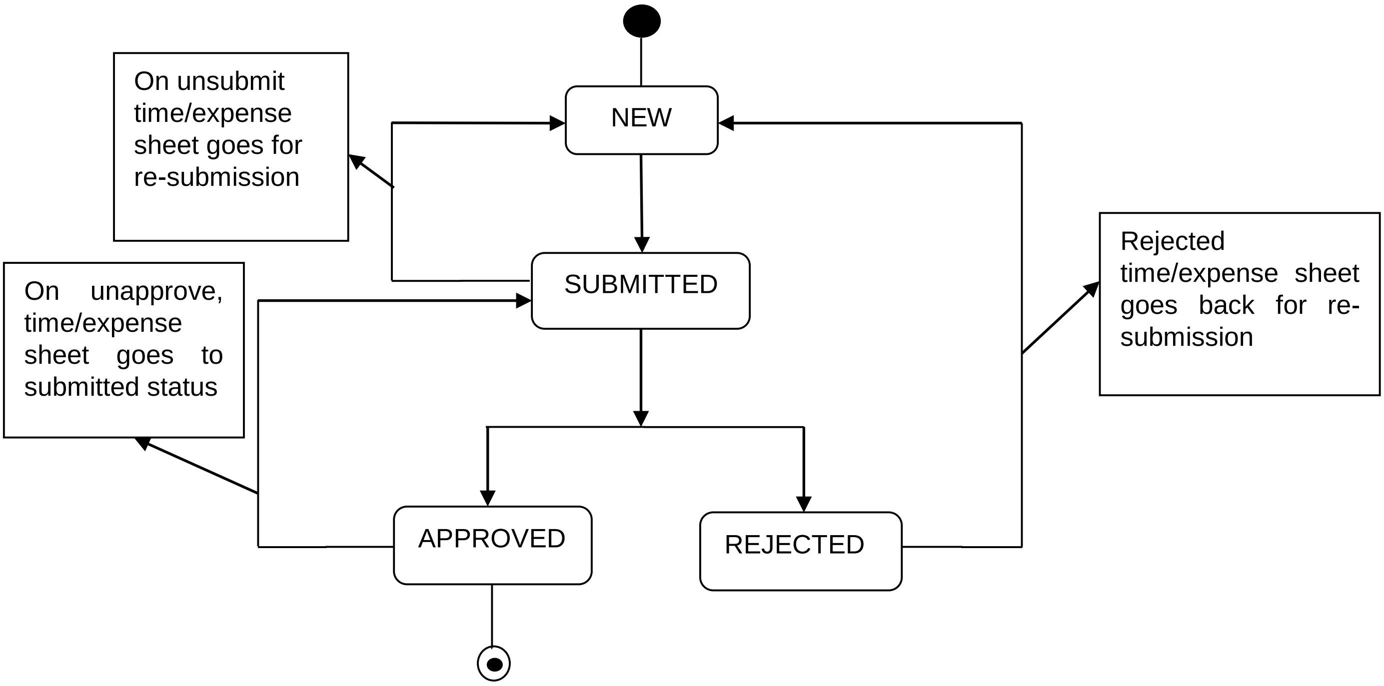
2.3.1 Status

The various statuses of the Time & Expense sheets are:

- New
- Submitted
- Approved

- Rejected.

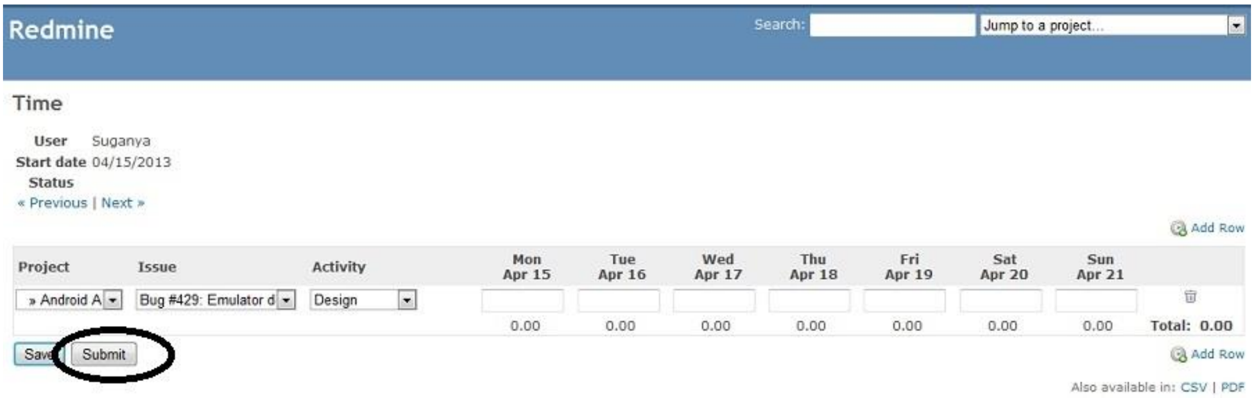
The time & expense sheet is in "New" status when it is created. Once the timesheet is submitted, it goes to the "Submitted" status. It goes to "Approved" status when the supervisor approves it. When the timesheet is rejected, it goes to the "Rejected" status and goes backs to the project member for resubmission. The Time & Expense Sheet returns to the "New" status when it gets un-submitted.



2.3.2 Workflow

The workflow of Approval system is as follows.

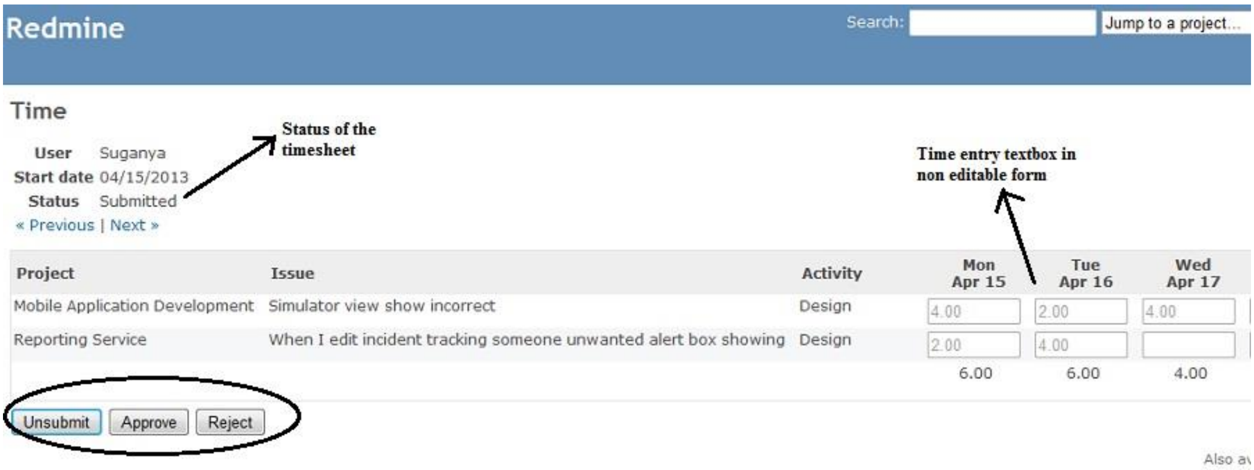
i) The Time & Expense sheet has the Submit button in addition to the Save button.



ii) A team member can save a time & expense sheet any number of times, but can only submit once.
iii) Once a time & expense sheet is submitted, the user with "Approve time logs" permission can approve / reject it, the project member can also un-submit his time & expense sheet, if he wants to take back his submission.
iv) Once approved, the time & expense sheets can never be edited.
v) If the time & expense sheet is rejected, then it goes back to the project member for re-submission. An email about the rejection is sent to the Project Member.

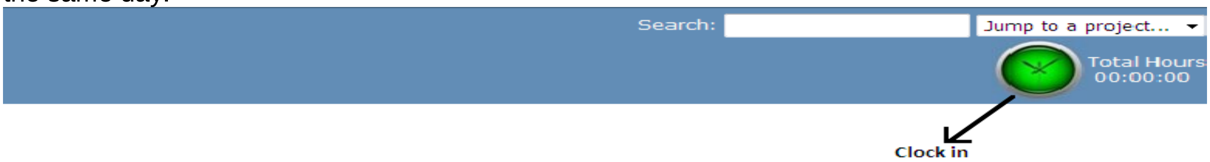
vi) Once approved, a time & expense sheet can be unapproved; it sends the time & expense sheet back to submitted state.

vii) If the timesheet is not submitted before deadline, then an email notification will be sent to the project member.

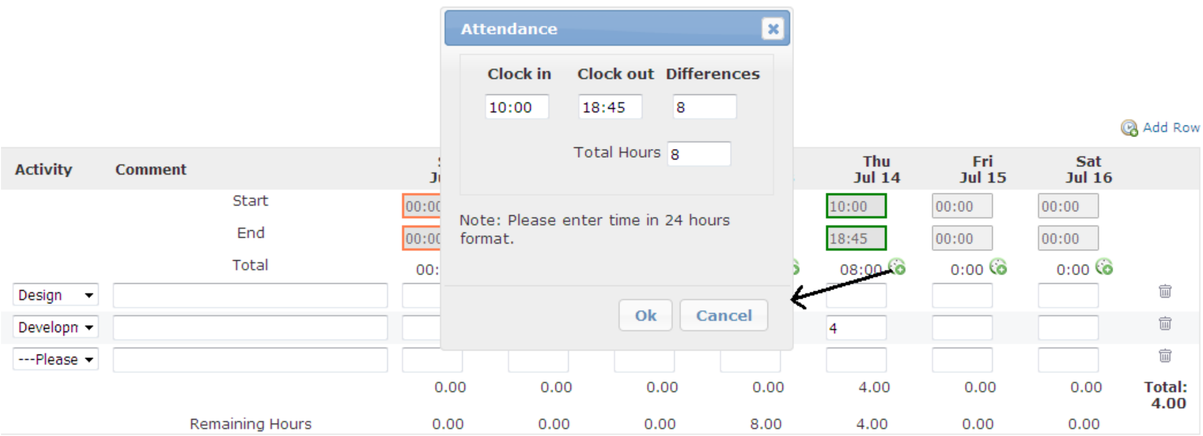


3. Attendance

Attendance module is enabled when "**Enable attendance module and Enable clock in / clock out**" is checked in the settings page. It allows the user to enable/disable attendance module and clock in and clock-out from the timesheet page. User is also allowed to do multiple clock-in and clock-out on the same day.

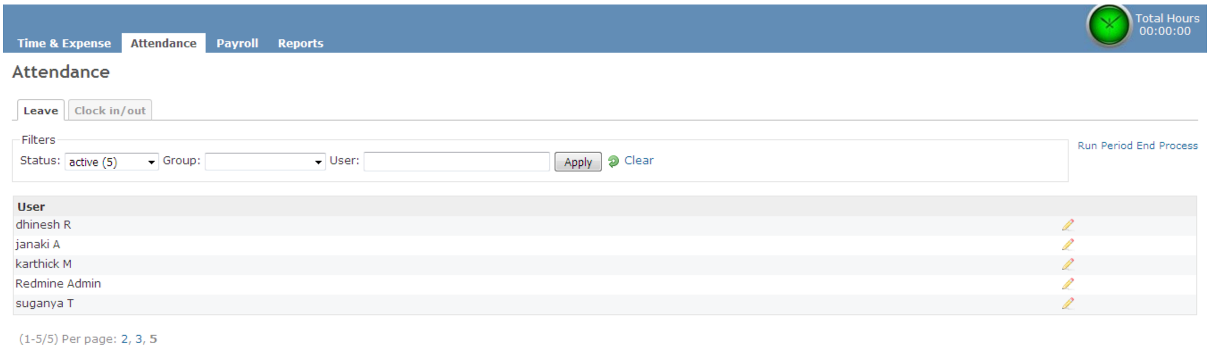


TE admin can add and edit other user's clock in and clock out time.The Start textbox shows the clock in time, End textbox shows the clock out time, Total number of hours worked in a day excluding the break time hours is shown below the end time. Remaining hours are the number of hours left to be logged.

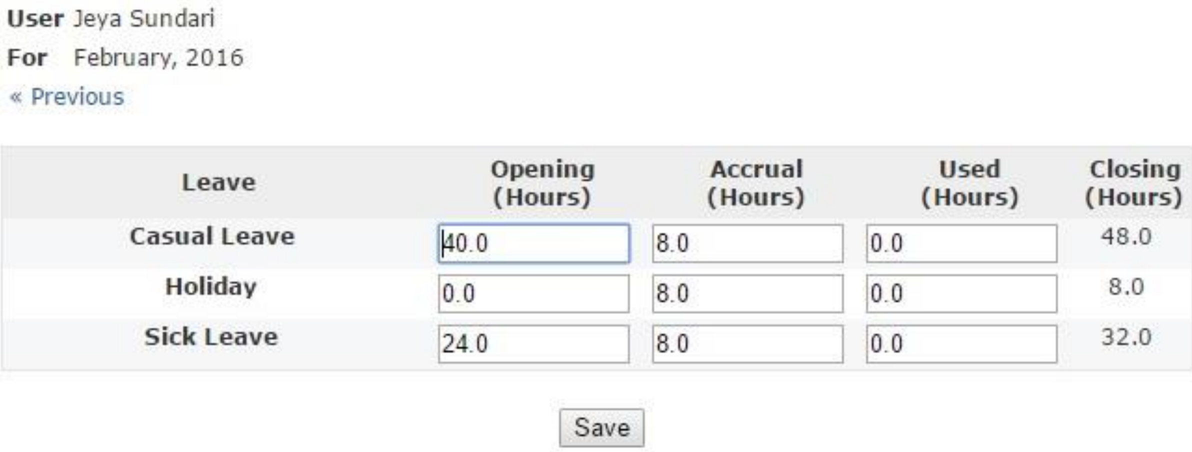


3.1 Leave Summary

The leave tab shows the summary of accrual, leave taken during the month. The list page shows closing balance for up to five configured leave information. User filters can be applied.



The detail page shows opening balance, accrual, leave taken in hours, remaining hours for each leave configured. TE admin are allowed to edit other user's leave information.



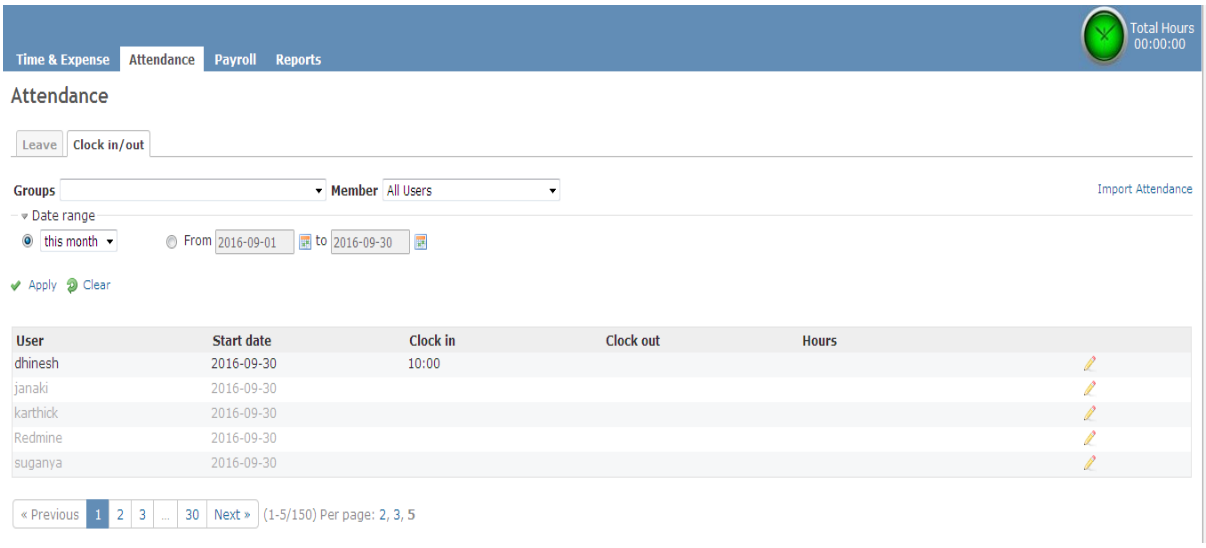
If the setting "**Approver Can Approve their own Time & Expense**" is enabled, then TE admin can edit his/her own leave information.

A scheduled job will be run at start of each month to calculate the leave accruals. The following rules are applied in calculating accruals

- Accrual will be given only when the user has attendance for at least 11 full days of month. For example, if the "**Default work time"** configured to 8 hours, then the user should have attendance for at least 88 hours to get accrual.
- If the 'reset month' is configured for a leave, then the balance will be reset to zero during that month. If the user has values in negative then it will be carry forwarded to the next period.
- If the 'accrual after' is configured, then accrual will start only after passing the initial period configured.

3.2 Clock in/out

The list page by default displays the daily clock in/out for the current month. Date range and Group filters can be applied to the list page.

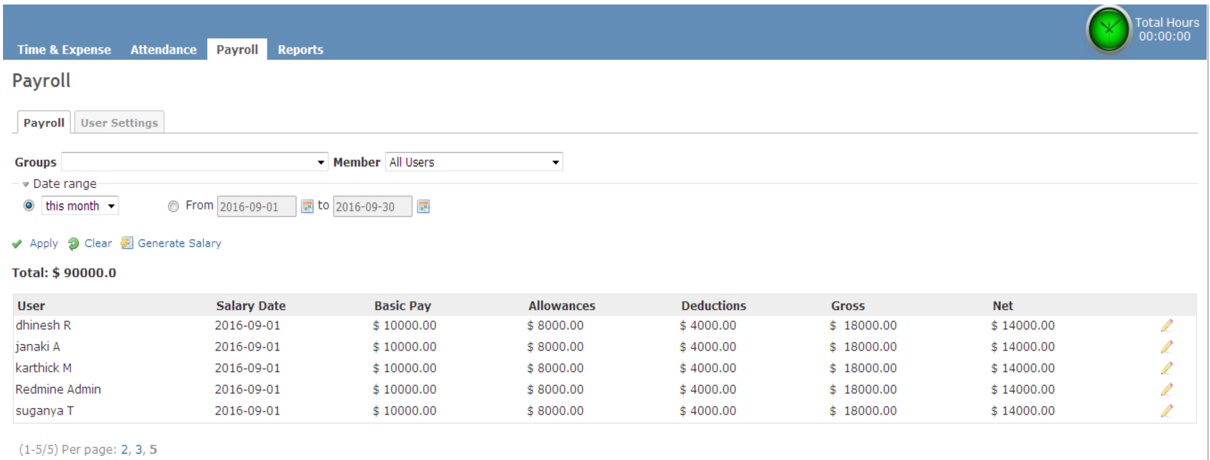


4. Payroll

This module allows the user to setup the payroll for the employees. The payroll settings can be done at the company level and can be overrides at the employee level. Once the payroll setup is done, the payroll can be generated on a periodic basis (monthly, weekly, bi-weekly etc). The payroll generation can be automated as well.

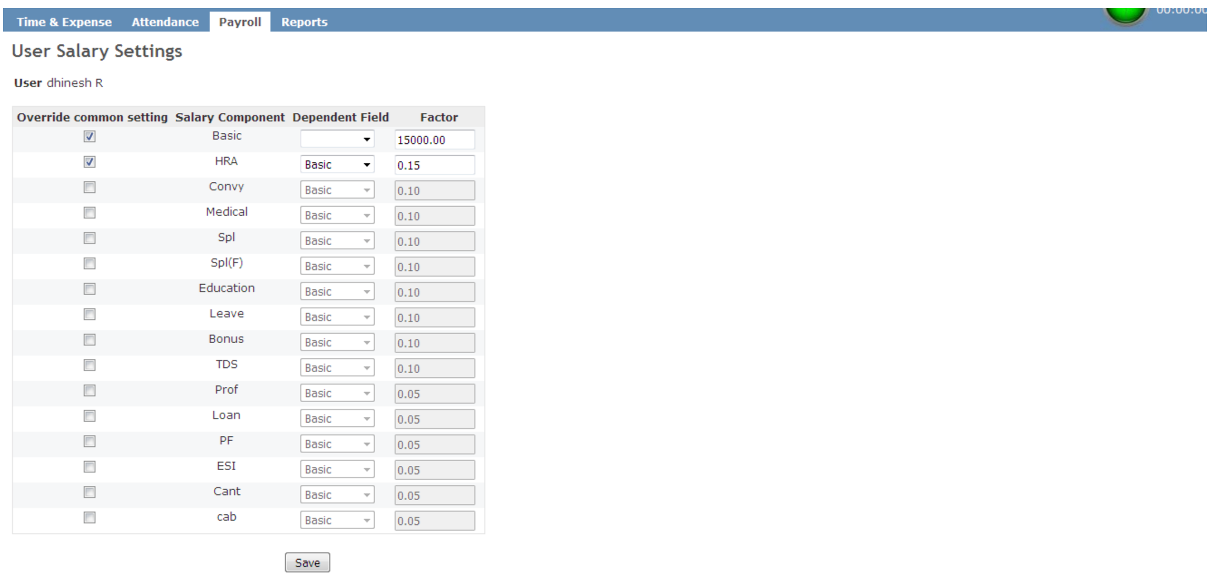
4.1 Payroll List

The list page by default displays the payroll for the current month. Date range and group filters can be applied to the list page and generate the salary .



4.2 User Settings

To override an user payroll setting from the company level payroll setting, the User Setting tab is used. The list page by default displays the list of users. User, status and Group filters can be applied to the list page. The Edit page can be used to override the payroll setting for the individual user.



5. Billing

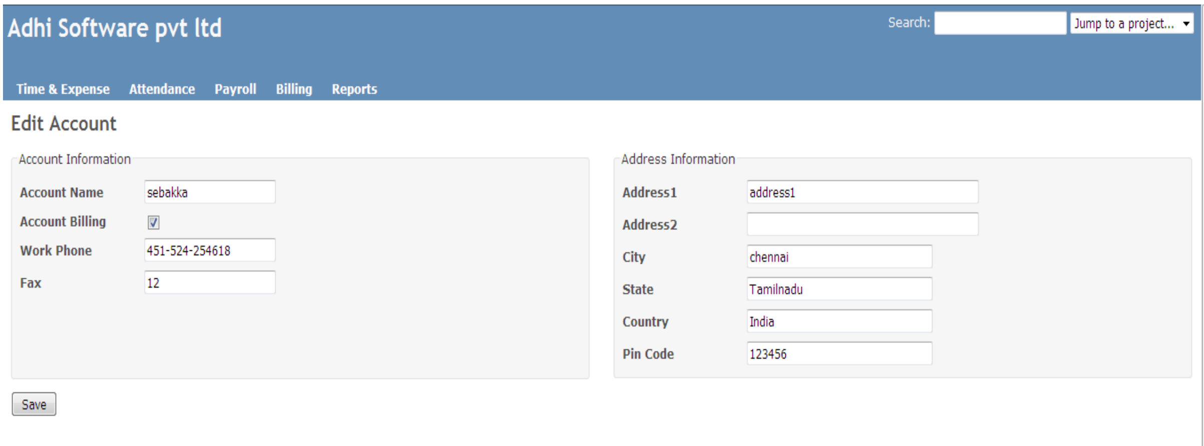
This module allows the Billing admin to setup the Billable projects, generate invoice and print the invoice. Billing admin can manage accounts, contracts, taxes and billable projects. Once the Billing setup is done, the invoice can be generated on a periodic basis (quarterly, monthly, weekly, bi-weekly etc). The invoice generation can be automated as well.

5.1 Accounts

Accounts are clients for whom the projects are executed, there can be multiple projects for an account. The list page by default displays the list of accounts. Account name wildcard search can be applied to the list page.

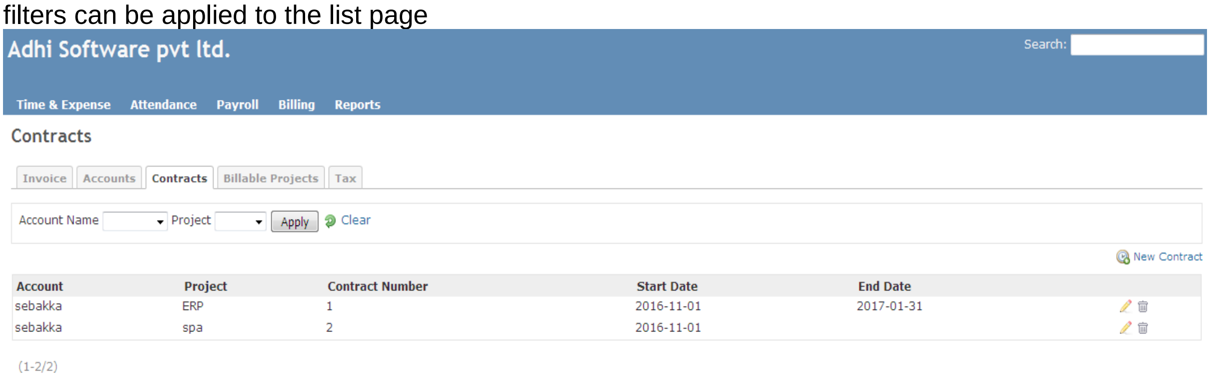
5.1.1 New Account

To add a new account, click on “New Account” hyperlink



5.2 Contracts

A contract is a signed agreement between an Account and the Company, they are typically signed before starting on a project. The list page by default displays the account contracts. Account, project filters can be applied to the list page



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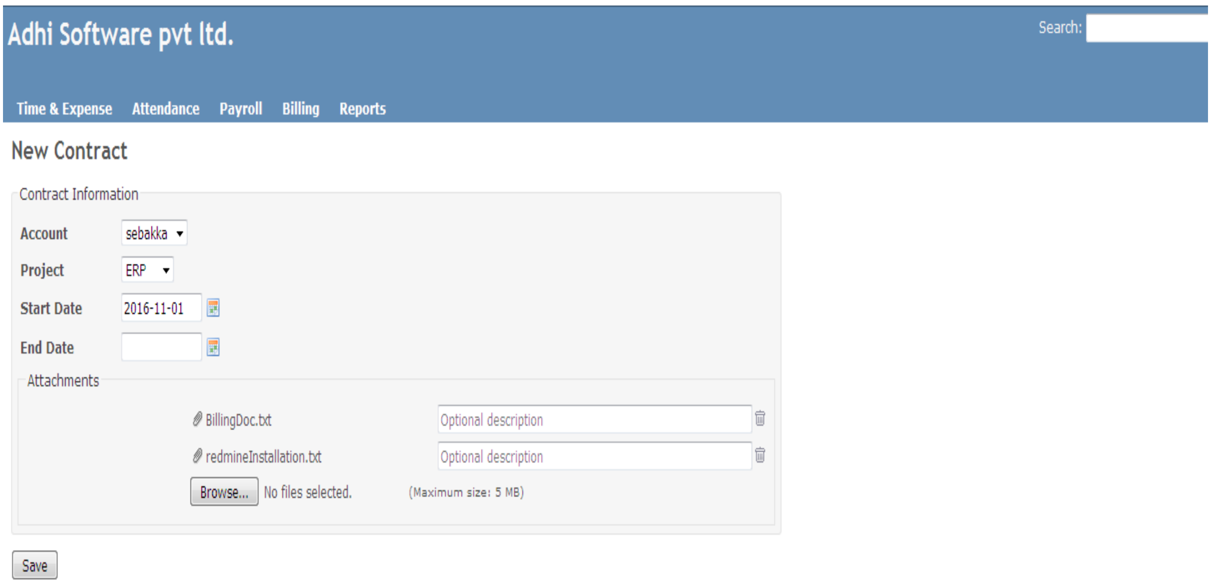
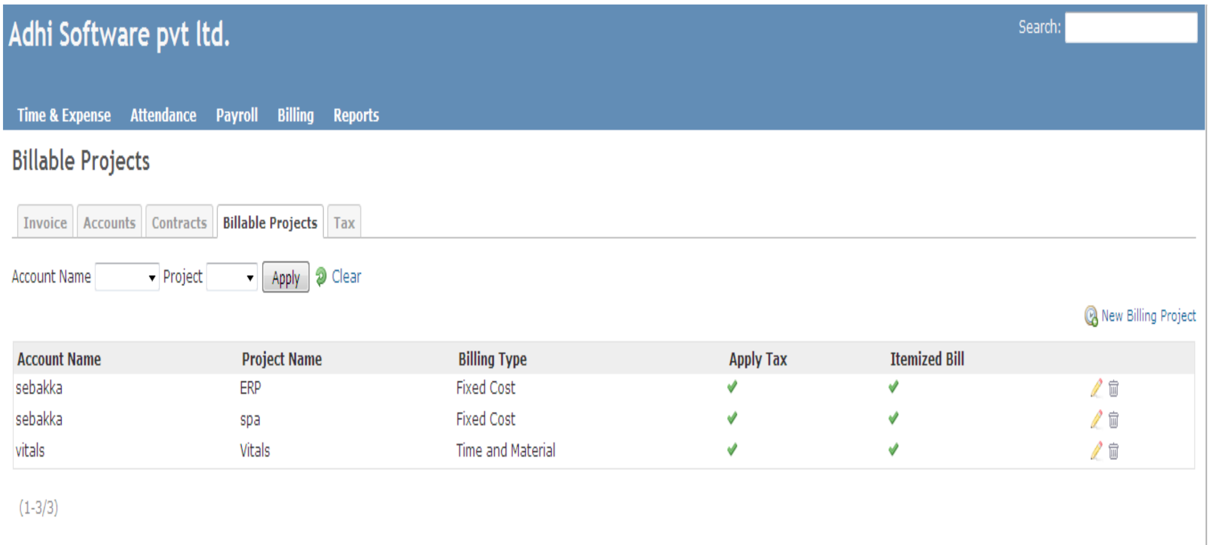
5.2.1 New contract

To add a new contract, click on “New Contract” hyperlink



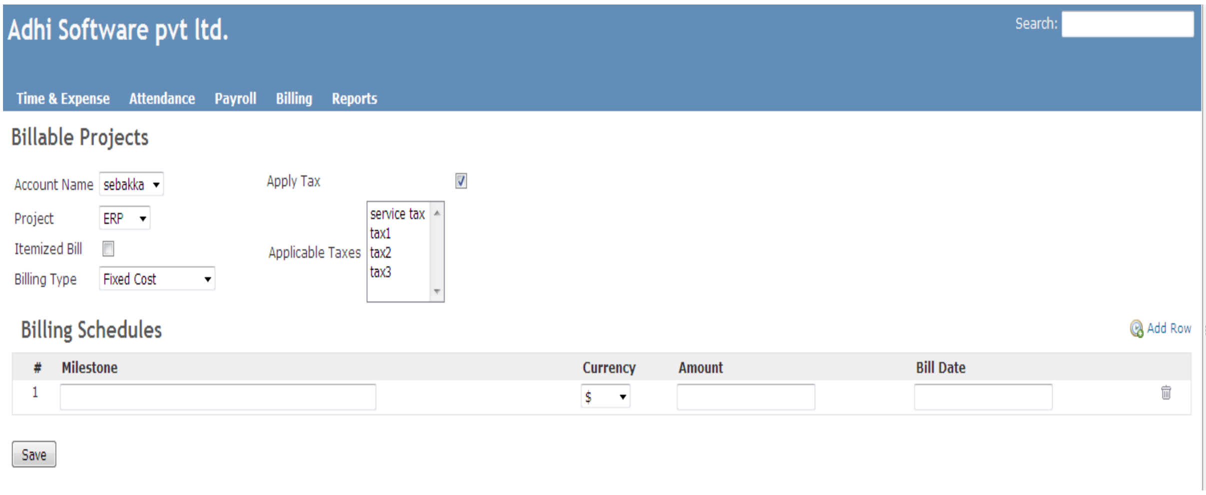
5.3 Billable Projects

Billable Projects are the ones which are setup for billing, they are created by associating projects to accounts. The list page by default displays the list of billable projects. Account and project filters can be applied to the list page. Account projects can be deleted using delete icon.



5.3.1 *New Billing Projects*

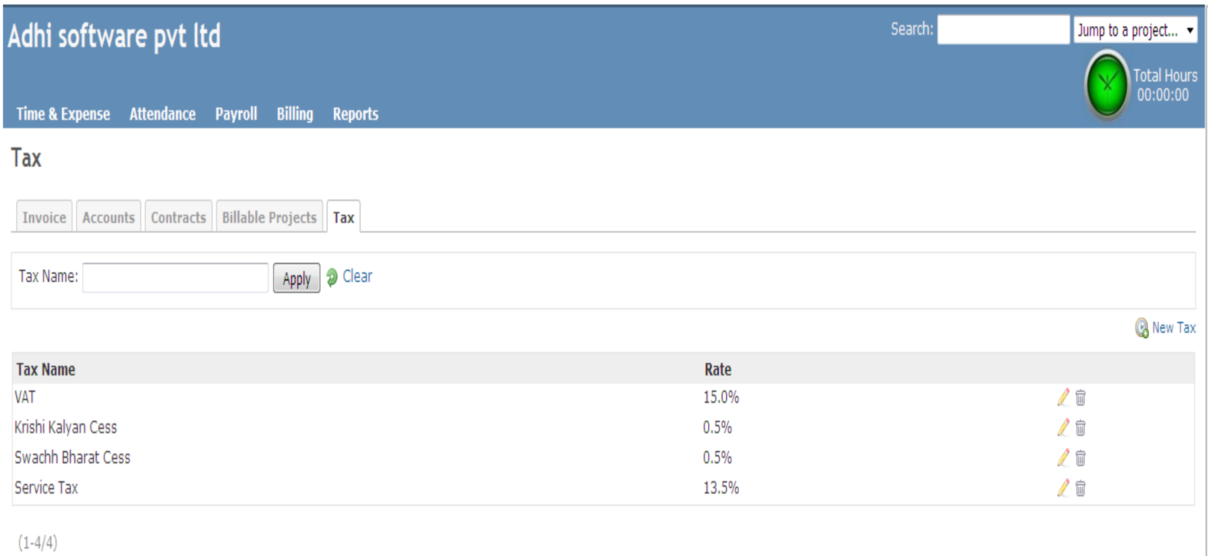
To add a new Billable Project, click on “New Billing Projects” hyperlink



The new/edit billing projects page associate the account and projects and define the properties such as; account billing types, account projects taxes and billing items and add the billing schedules. Billing schedules are required for Fixed Cost projects.

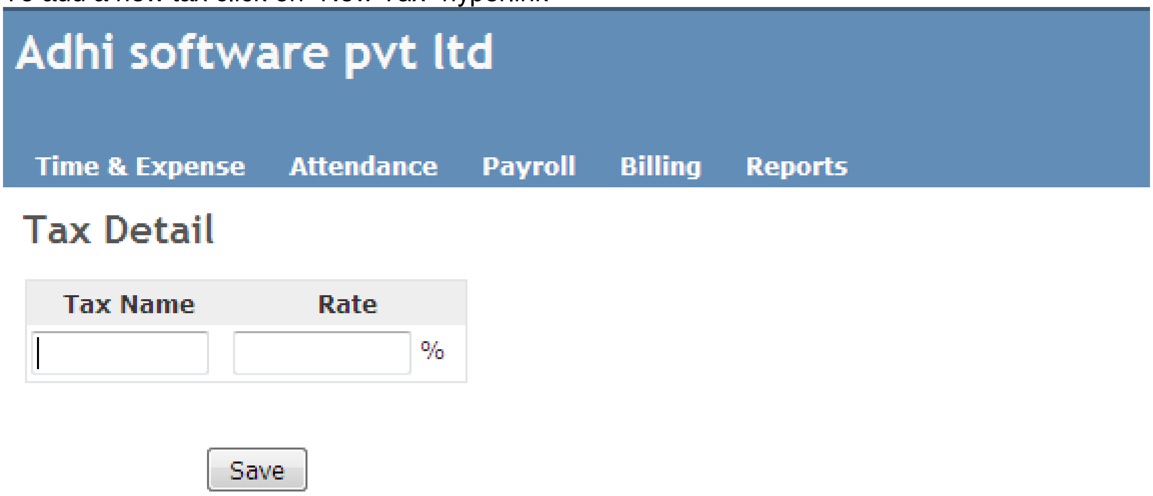
5.4 Taxes

The list page by default displays the list of taxes. Tax name wildcard search can be applied to the list page. Tax can be removed.



5.4.1 New/Edit Tax

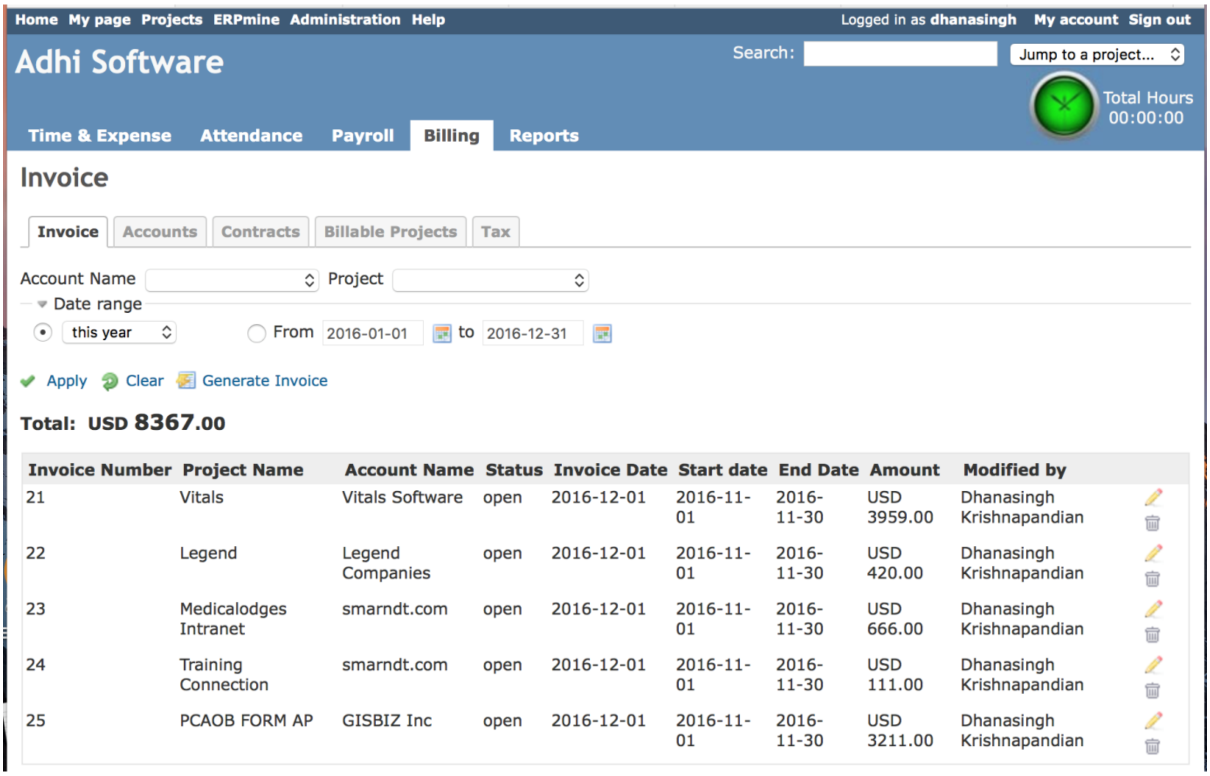
To add a new tax click on “New Tax” hyperlink



The tax name and rate can added/updated.

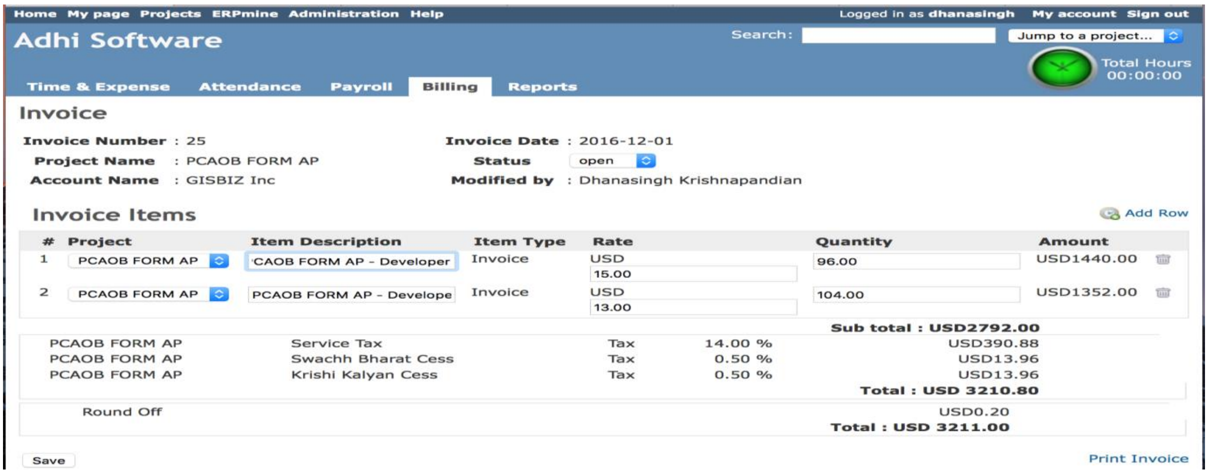
5.5 Invoice List

The list page by default displays the invoice for the current month. Date range, account and project filters can be applied to the list page. The invoices for a period can be generated from this page also.



5.5.1 *Edit Invoice*

The invoice edit page displays the invoice details such as invoice number, project name, account name, invoice date, status, modified by and invoice items. Invoice items can be edited and new invoice items can be added also. taxes are automatically applied. Invoices can be printed using 'print invoice' link.



5.5.2 Print invoice

INVOICE

ADHI SOFTWARE

Name & Address of the Supplier	Name & Address of the Customer	Invoice Number	Invoice Date
Adhi Software 12/B-35, 6th Cross Road SIPCOT IT Park, Siruseri Kancheepuram, TN - 603103 India	GISBIZ Inc 25 Century Blvd STE 602 Nashville TN 37214 USA	25	December 1, 2016
Contract / Purchase Order / Work Order / Agreement Date & Reference			**Period**
			November 1, 2016 to November 30, 2016

Item Description	Billing Type	Rate	Quantity	Currency	Amount
PCAOB FORM AP - Developer	Hours	15.00	96.00	USD	1440.00
PCAOB FORM AP - Developer	Hours	13.00	104.00	USD	1352.00
		Sub total	**200.00**	**USD**	**2792.00**
Service Tax		14.00%		USD	390.88
Swachh Bharat Cess		0.50%		USD	13.96
Krishi Kalyan Cess		0.50%		USD	13.96
		Total	**200.00**	**USD**	**3210.80**
Round Off				USD	0.20
		Grand Total	**200.00**	**USD**	**3211.00**

Amount in Words	Three thousand two hundred and eleven only.
Import Export Code No	0406025894
Payment Terms	Within 15 days
Banker's Reference	:
Name & Address of the Bank	Canara Bank 159 Thiruvalluvar Salai, Thiruvanmiyur, Chennai – 600041
Bank Code No	600015078

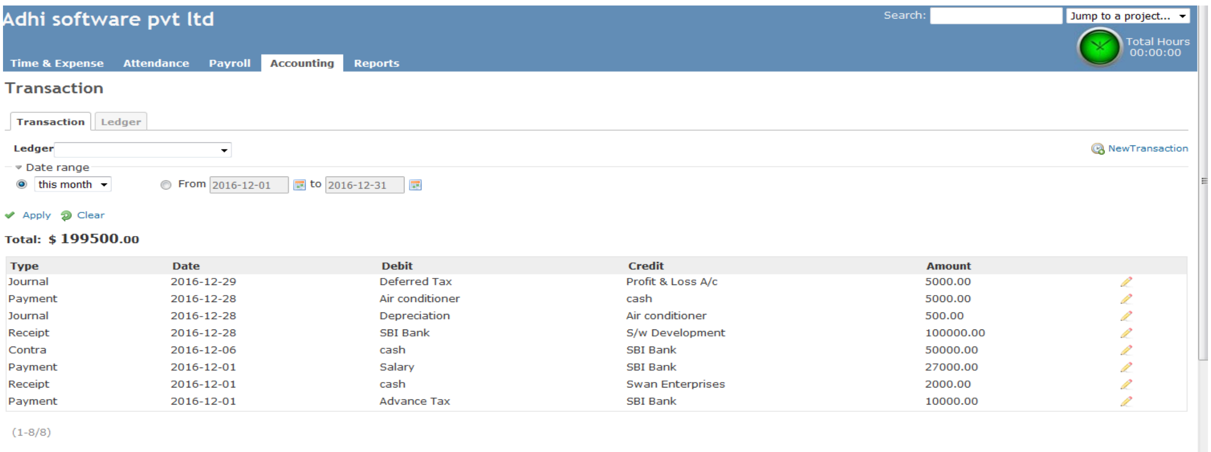
Place : **Authorized Signatory**
Date :

6. Accounting

This module allows the Accounting user to create/update the financial transaction and Ledgers.

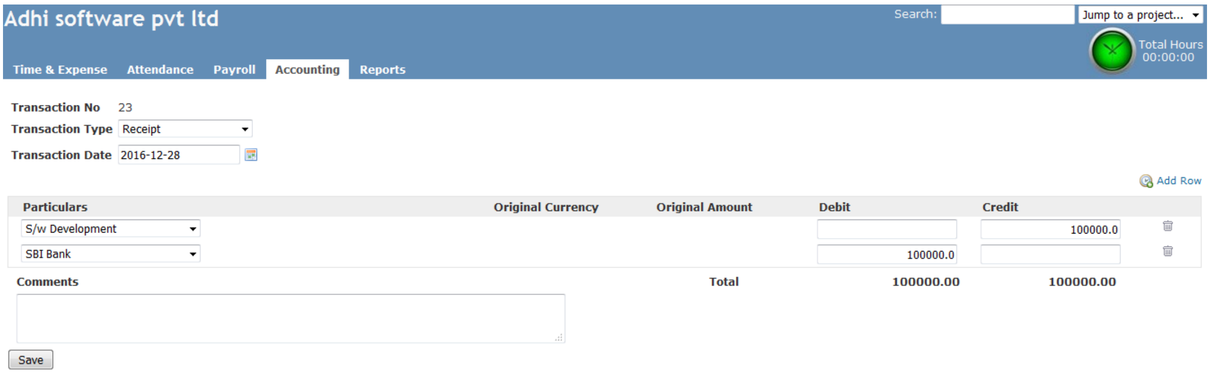
6.1 GL Transaction

The list page by default displays the transaction details for the current month. Date range and ledgers filters can be applied to the list page.



6.1.1 New/Edit GL Transaction

The transaction edit page displays the transaction details such as transaction number, type, date, comments and ledgers. Transaction details can be edited and new transaction details can be added also.

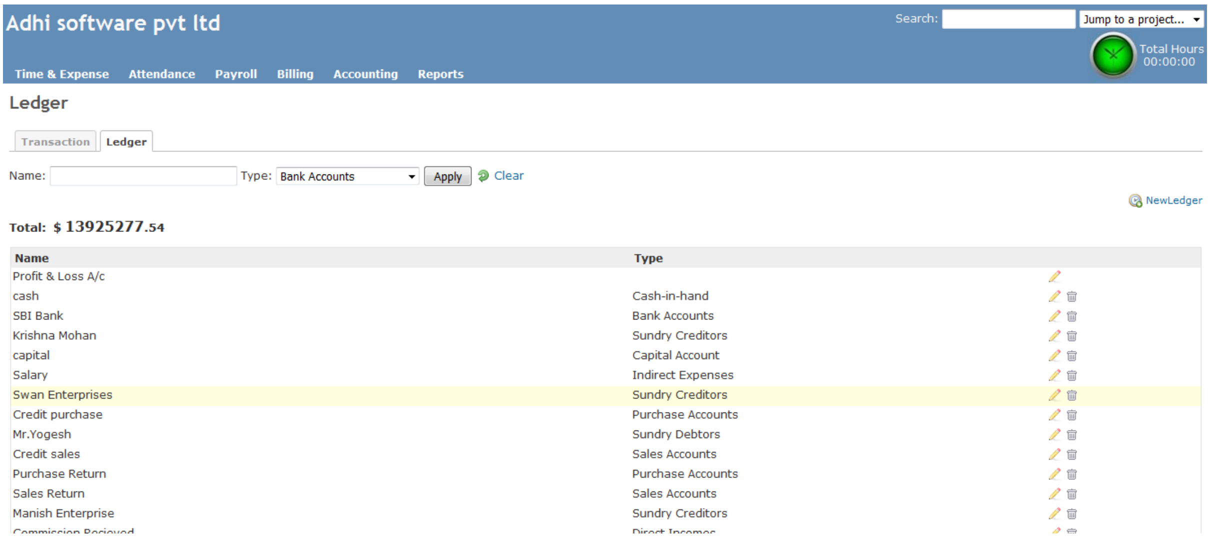


Following are some validation rules used when entering a GL transaction.

#	Transaction Type	Cr	Dr	Rule
1	Contra	Bank Ac / Cash	Bank Ac / Cash	Contra should contain bank and cash ledgers only.
2	Payment	Bank Ac / Cash		Payment should have bank or cash as Credit.
3	Receipt		Bank Ac / Cash	Receipt should have bank or cash as Debit
4	Purchase	Sundry creditors Sundry debitors, Bank Ac / Cash	Purchase Group	Purchase should have sundry creditors/debitors, cash and bank as credit and purchase group as debit
5	Sales	Sales Group	Sundry creditors Sundry debitors, Bank Ac / Cash	Sales should have sundry creditors/debitors, cash and bank as debit and sales group as credit
6	Credit note	Sundry creditors Sundry debitors, Bank Ac / Cash	Except Bank Ac / Cash	Credit note should have sundry creditors/debitors, cash and bank as credit and should not have cash and bank as debit.
7	Debit note	Except Bank Ac / Cash	Sundry creditors Sundry debitors, Bank Ac / Cash	Debit note should have sundry creditors/debitors, cash and bank as debit and should not have cash and bank as credit.

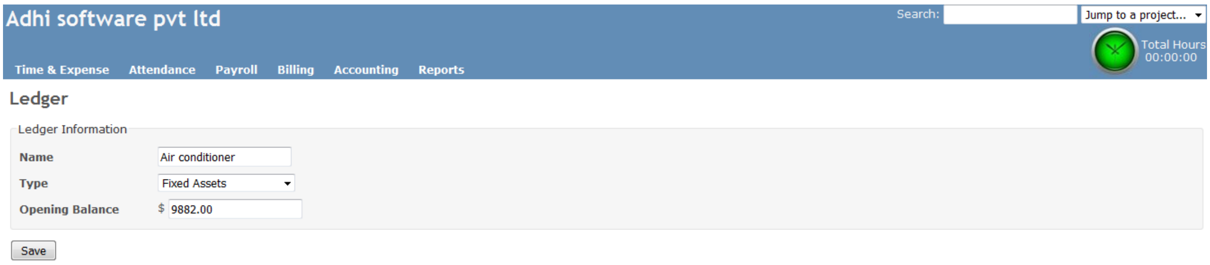
6.2 Ledgers

The list page by default displays the list of ledgers. Ledger name wildcard search and ledger type filters can be applied to the list page. Ledger can be removed.



6.2.1 New/Edit Ledger

To add a new tax click on “New Tax” hyperlink



7. Reports

7.1 Attendance

Attendance report shows the monthly view of attendance. Date range and Group filters can be applied. The report displays the general information of the user along with the leave summary and attendance entries for the month. The leave taken by the user will be marked with short name of the leave. TE Admins have the privilege to look into other user’s attendance.

FORM-Q
REGISTER OF EMPLOYMENT FOR SH
Name and Address of the Establishment: Re

Sl. No.	User	Date of entry into service	Age / Date of birth	Designation	Leave Credit at the Beginning of the Month			Leave Availed During the Month			Leave Balance										
					SL	CL	H	SL	CL	H	SL	CL	H	1	2	3	4	5	6	7	8
33	Suganya Thulasiraman	05/03/2010		SSE	24.0	32.0	8.0	16.0	0.0	0.0	16.0	40.0	16.0	6.62	4.25	8.5	9.0				8.0
	Karthick Madhiazhagan	03/03/2014		Program Analyst	-13.0	48.0	8.0							4.8	8.5		8.5				CL
	Jeya Sundari							0.0	0.0	0.0	8.0	8.0	8.0	5.75	7.5						
	Dhinesh R	06/02/2014		Prgm Analyst				0.0	0.0	0.0	8.0	8.0	8.0	6.5	8.0	8.25	5.75			CL	
	Redmine Admin													4.75/ SL	6.7					CL	CL
	janaki janaki			Admin																	
	Veeralakshmi D		04/07/1985	SSEngineer	48.0	32.0	16.0														
34	Chandra D	05/03/2010	01/11/1988	SSE				0.0	0.0	0.0	8.0	8.0	8.0	8.5	8.5	9.5	8.75	9.17		7.5	
32	Saravana C	03/18/2009		SSE																	
40	Aravind S	03/01/2012		SE				0.0	8.0	0.0	8.0	0.0	8.0								
	Arul Baskar	12/01/2010		SSE				0.0	0.0	0.0	8.0	8.0	8.0								
	Prabhakar Selvam	12/01/2010	01/30/2016	Sr s/w Tester	0.0	24.0	8.0	0.0	0.0	8.0	8.0	32.0	8.0								
	dhana lakshmi	11/01/2010	12/17/1987																		

Note: The user with termination date less than the report date will not be shown in report. And also locked users will not be shown in report.

7.2 Timesheet

Time report shows the weekly view of spent time. Date range and Group filters can be applied. The report displays the name, week, projects, issues, activity, comment, custom fields and spent time.

Timesheet

Name : suganya T
Week : 2016-07-10 - 2016-07-16

Project	Issue	Activity	Comment	Estimated hours	Difficulties	Sun Jul 10	Mon Jul 11	Tue Jul 12	Wed Jul 13	Thu Jul 14	Fri Jul 15	Sat Jul 16
SPA	GI Interface	Design					8.00	8.00	8.00	8.00	8.00	
					Total = 40.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00

I Acknowledge that the hours entered are accurate to the best of my knowledge

Signature :
Submitted By ____________________
Approved By ____________________

7.3 ExpenseSheet

Expense report shows the weekly expense entries made for the project. Date range and Group filters can be applied. The report displays the name, week, projects, issues, activity, comment and currency.

Expensesheet

Name : suganya T
Week : 2016-07-10 - 2016-07-16

ADHI SOFTWARE

Project	Issue	Activity	Comment	Currency	Sun Jul 10	Mon Jul 11	Tue Jul 12	Wed Jul 13	Thu Jul 14	Fri Jul 15	Sat Jul 16
SPA	GI Interface	Design		$		10.00	10.00	10.00	10.00	10.00	
				Total = $ 50.00	$ 0.00	$ 10.00	$ 10.00	$ 10.00	$ 10.00	$ 10.00	$ 0.00

I Acknowledge that the hours entered are accurate to the best of my knowledge

Signature :
Submitted By ____________________
Approved By ____________________

7.4 Spent Time

Attendance report shows the monthly view of attendance. Date range and Group filters can be applied. The report displays the general information of the user along with the leave summary and spent time entries for the month. The leave taken by the user will be marked with short name of the leave. TE Admins have the privilege to look into other user's attendance.

FORM-Q
REGISTER OF EMPLOYMENT FOR SHOPS AND ESTABLISHMENTS
Name and Address of the Establishment: Adhi software pvt ltd **Month:** July **Year:** 2016

Sl. No.	User	Date of entry into service	Age / Date of birth	Designation	Leave Credit at the Beginning of the Month			Leave Availed During the Month			Leave Balance			Da											
					SL	CL	WH	SL	CL	WH	SL	CL	WH	1	2	3	4	5	6	7	8	9	10	11	12
	Redmine Admin							0.0	0.0	0.0	0.0	0.0	0.0												
33	Suganya Thulasiraman	05/18/2010	05/13/1987		0.0	24.0	0.0	0.0	0.0	0.0	0.0	24.0	0.0	4.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.
55	Karthick Adhi				0.0	40.0	0.0	0.0	0.0	0.0	0.0	40.0	0.0												
62	Jeya Sundari	06/11/2014	07/03/1989		0.0	32.0	0.0	0.0	16.0	0.0	0.0	16.0	0.0		5.0	5.0	5.0	5.0	5.0	5.0	5.0			CL	CL
61	Dhinesh Kumar	04/15/2015	01/09/1989		0.0	24.0	0.0	4.0	20.0	0.0	-4.0	4.0	0.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0		5.0	5.
55	Jeya Priya	03/18/2014	09/10/1990	Software analysis				0.0	0.0	0.0	0.0	0.0	0.0	4.0	5.0		5.0	4.0	3.0	2.0	1.0	5.0			
52	Divya Bharathi	09/07/2015						0.0	0.0	0.0	0.0	0.0	0.0	8.0			8.0	8.0	8.0	8.0	8.0			5.0	5.
56	janaki adhi	04/16/2014	03/14/1989	Admin				0.0	0.0	0.0	0.0	0.0	0.0												
51	Gandhi Mathi	01/01/2016	06/19/1991	Software analysis				0.0	0.0	0.0	0.0	0.0	0.0												
25	Veera Lakshmi	01/15/2008	04/09/1985	senior Software				0.0	0.0	0.0	0.0	0.0	0.0												
34	Chandra Durairaj	05/12/2010	01/11/1988	senior Software				0.0	1.0	0.0	0.0	-1.0	0.0						CL						
43	Arul Baskar	01/19/2011	01/22/1986	senior Software				0.0	0.0	0.0	0.0	0.0	0.0										2.0	3.0	4.
63	Anitha adhi	11/24/2015	07/15/1989		0.0	5.0	0.0	0.0	0.0	0.0	0.0	5.0	0.0				5.0	5.0	5.0	5.0	5.0		5.0	5.0	5.
64	Thanga Raj	12/01/2015	01/09/1980	Test Analyst				0.0	0.0	0.0	0.0	0.0	0.0												
41	Prabhakaran adhi	09/07/2011			0.0	32.0	0.0	0.0	0.0	0.0	8.0	40.0	8.0	8.0			8.0	8.0	8.0	8.0	8.0			8.0	8.
71	krish raghunandan	06/01/2015	06/24/2016	Developer	0.0	24.0	0.0	0.0	15.0	0.0	8.0	17.0	8.0				5.0	5.0	5.0	5.0	5.0			6.0	6.
66	meena adhi	06/01/2016						0.0	0.0	0.0	0.0	0.0	0.0												
	Berret Hinn	04/01/2015						0.0	0.0	0.0	0.0	0.0	0.0	CL		4.0	4.0	4.0	5.0	4.0	4.0	4.0	5.0	5.0	5.
	Boopathi adhi							0.0	0.0	0.0	0.0	0.0	0.0	CL		4.5	5.0	4.0	5.0	5.0	4.0		5.0	5.0	5.
31	Saravana Adhi				16.0	40.0	0.0	0.0	0.0	0.0	16.0	40.0	8.0	6.0		8.0	8.0	8.0	8.0	8.0	8.0			5.0	
68	Dhana Lakshmi							0.0	0.0	0.0	0.0	0.0	0.0	4.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.
49	Suresh adhi				8.0	24.0	0.0	0.0	0.0	0.0	8.0	24.0	8.0	5.0			5.0	5.0	5.0	5.0	5.0			5.0	5.
47	Aravind adhi	10/01/2015			24.0	40.0	0.0	0.0	25.0	0.0	24.0	23.0	8.0	8.0			5.0	5.0	5.0	5.0	5.0			CL	CL

(1-23/23)

7.5 Payroll Report

Payroll report shows the view of salary register. Date range and Group filters can be applied. The report displays the general information of the user along with the basic, allowances and deduction for the salary period. TE Admins have the privilege view other user's salary data.

FORM-R
Register of Wages
See Sub Rule(5) of rule 11 of Tamilnadu Shops and Establishments Rule, 1948
Name and Address of the Establishment: Adhi software Pvt Ltd 12/B-35, 6th cross Road SIPCOT IT Park, Siruseri Kancheepuram **Wages Period Month:** 2016-09-01

Id	Name	Gender	Designation	Basic Pay	Medical	conv	HRA	SPL(1)	SPL(F)	Edu	Leave	Bonus	PF	Cab	
33	Suganya			27500.0	1250.0	1600.0	15250.0	0.0	9400.0				3300.0	0.0	1
61	Dhinesh			10000.0	1250.0	1600.0	5950.0	0.0	1200.0				1200.0	0.0	
55	Jeya		Software analysis	15000.0	1250.0	1600.0	7950.0	0.0	1200.0				1800.0	600.0	
52	Divya			15000.0	1250.0	1600.0	7950.0	0.0	1200.0				1800.0	600.0	
56	janaki		Admin	10000.0	1250.0	1600.0	5950.0	0.0	1200.0				1200.0	0.0	
25	Veera		senior Software	29000.0	3000.0	2920.0	17000.0	0.0	12000.0				3480.0	0.0	1
43	Arul		senior Software	22500.0	1250.0	2800.0	11250.0	0.0	8400.0				2700.0	0.0	1
63	Anitha			100.0	1250.0	1600.0	7950.0	0.0	1200.0				12.0	600.0	
	Redmine			10000.0	1250.0	1600.0	7950.0	0.0	1200.0				1200.0	0.0	
	Berret			2490000.0	207500.0	265600.0	1319700.0	0.0	199200.0				298800.0	0.0	
64	Thanga		Test Analyst	0.0	0.0	0.0	0.0	0.0	0.0				0.0	0.0	
55	Karthick			15000.0	1250.0	1600.0	7950.0	0.0	1200.0				1800.0	0.0	
41	Prabhakaran			0.0	0.0	0.0	0.0	0.0	0.0				0.0	0.0	
66	meena			10000.0	1250.0	1600.0	7950.0	0.0	1200.0				1200.0	0.0	
	Boopathi			8000.0	100000.0	128000.0	636000.0	0.0	96000.0				960.0	0.0	
49	Suresh			0.0	0.0	0.0	0.0	0.0	0.0				0.0	0.0	
47	Aravind			2415000.0	172500.0	220800.0	1207500.0	0.0	814200.0				289800.0	0.0	1
31	Saravana			3045000.0	315000.0	168000.0	1785000.0	0.0	1260000.0				365400.0	0.0	42
68	Dhana			15000.0	1250.0	1600.0	7950.0	0.0	1200.0				1800.0	0.0	
6	Dhanasingh		Director												

7.6 Payslip Report

Payslip report shows the view of salary payslip for individual user . Date range and Group filters can be applied. The report displays the general information of the user along with the basic, allowances and deduction for the month. TE Admins have the privilege to view other user's Payslip.

Payslip

Adhi software Pvt Ltd
12/B-35, 6th cross Road
SIPCOT IT Park, Siruseri
Kancheepuram

Salary Date	2016-09-01	Employee Name	Dhinesh Kumar	Employee Id	61
Join Date	2015-04-15				

Earnings			Deductions		
	Monthly	YTD		Monthly	YTD
Basic Pay	R$ 10000.00	R$ 10000.00	**canteen**	R$ 270.00	R$ 270.00
HRA	R$ 5950.00	R$ 5950.00	**PF**	R$ 1200.00	R$ 1200.00
SPL(1)	R$ 0.00	R$ 0.00	**Cab**	R$ 0.00	R$ 0.00
SPL(F)	R$ 1200.00	R$ 1200.00	**Prof.Tax**	R$ 1173.00	R$ 1173.00
Medical	R$ 1250.00	R$ 1250.00	**Loan**	R$ 0.00	R$ 0.00
conv	R$ 1600.00	R$ 1600.00	**TDS**	R$ 0.00	R$ 0.00
Total Earnings	R$ 20000.00	R$ 20000.00	**Total Deductions**	R$ 2643.00	R$ 2643.00
Net Earnings	R$17357.00	R$17357.00			

YTD - Year to Date from April 01, 2016 to March 31, 2017

7.7 Profit & Loss A/c Report

Profit & Loss a/c shows the view of income and expense of financial transaction. Date range filter can be applied. Accounting Admins and Users have the privilege to view the data.

Adhi software Pvt Ltd
Profit & Loss A/c
December 1, 2016 To December 31, 2016

Particulars		December 1, 2016 To December 31, 2016
Trading Account :		
Sales Accounts		
Direct Incomes		**100000.00**
S/w Development	100000.00	
Cost of sales		**260.00**
Purchase Accounts		
Direct Expenses	260.00	
Canteen	-240.00	
Depreciation	500.00	
Gross Profit :		**99740.00**
Income Statement :		
Indirect Incomes		
		99740.00
Indirect Expenses		**27000.00**
Salary	27000.00	
Net Profit :		**72740.00**

7.8 Balance Sheet

Balance Sheet shows the view of inflow and outflow of financial transaction. Date range filter can be applied. Accounting Admins and Users have the privilege to view the data.

Adhi software Pvt Ltd
Balance Sheet
As at December 31, 2016

Source of Funds :		
Capital Account		**800000.00**
Paid Up Capital	800000.00	
Loans (Liability)		**4174033.05**
Unsecured Loans	4174033.05	
Current Liabilities		**810033.00**
Provisions	**-5000.00**	
Deferred Tax	-5000.00	
Sundry Creditors	**2000.00**	
Swan Enterprises	2000.00	
Salary Payable	640000.00	
Provisions	169433.00	
PF	3600.00	
Profit & Loss A/c		**1235152.72**
Opening Balance	1157412.72	
Current Period	72740.00	
Less: Transferred	5000.00	
Total :		**7019218.77**
Application of Funds :		
Fixed Assets		**5296545.87**
Machinery	55456.00	
Air conditioner	14382.00	
Computer	711204.87	
Office Building	3599853.00	
Land	915650.00	
Current Assets		**1722672.90**
Bank Accounts	**472000.43**	
SBI Bank	472000.43	
Cash-in-hand	**97095.00**	
cash	97095.00	
Loans & Advances	493806.00	
Sundry Debtors	544716.47	
Advance Tax	125055.00	
Loan	-10000.00	
Total :		**7019218.77**

8. ERPmine Settings

The plugin can be configured from the plugin settings page to customize its behavior. Only the administrators can access this page. The plugin configurations are grouped into the following categories; Display Settings, Export (for pdf) Settings, Time & Expense Settings, Approval system Settings, Attendance Settings.

The settings defined in the "Time & Expense" section are common to both timesheet and expense sheet. There is also separate section for "Time" and "Expense" as well, the settings which comes under these sections is specific to its sheets.

8.1 General Settings

8.1.1 Enable repots

This setting can be used to enable / disable the report module.

8.1.2 Company Name

This settings can be used to define the organization name.

8.1.3 Address

This settings can be used to define the organization address.

8.1.4 Header Logo

This settings can be used to define the organization address.

8.2 Time & Expense Settings

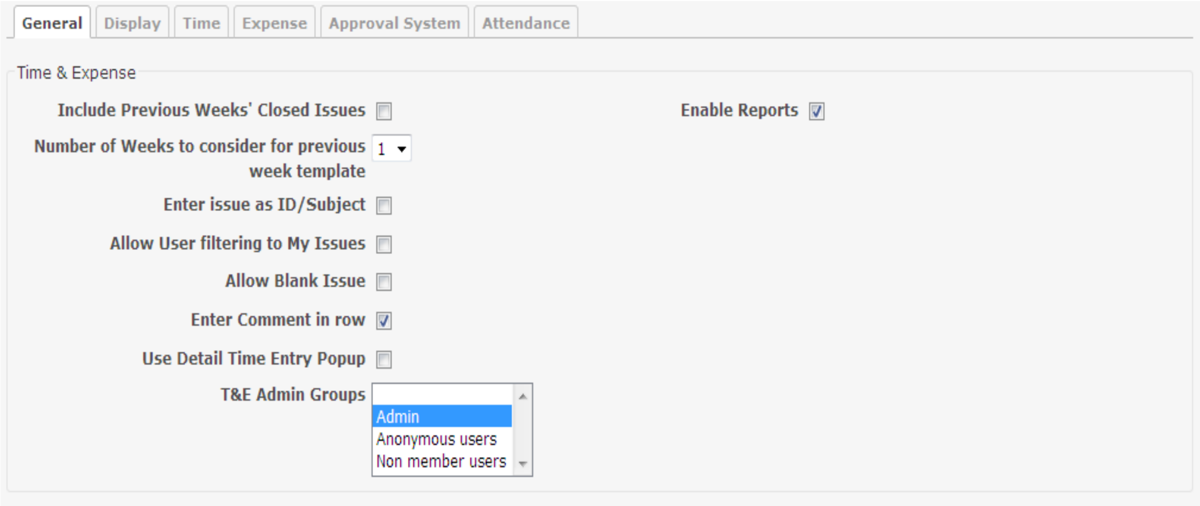
8.2.1 Include closed issues

The issue dropdown in time & expense sheet will list only issues which are currently open. To include previous weeks closed issues, enable the configuration "**Include Previous Weeks' Closed Issues**". **Note:** The current week's closed issue is not affected by this setting it will always be shown in issue dropdown.

8.2.2 Previous week template

The new time & expense sheets can be created using previous week sheets as template. There is a checkbox "**Previous week's template**" in the new time & expense sheet page. If it is checked, then previous week(s) time & expense sheet are used as template.

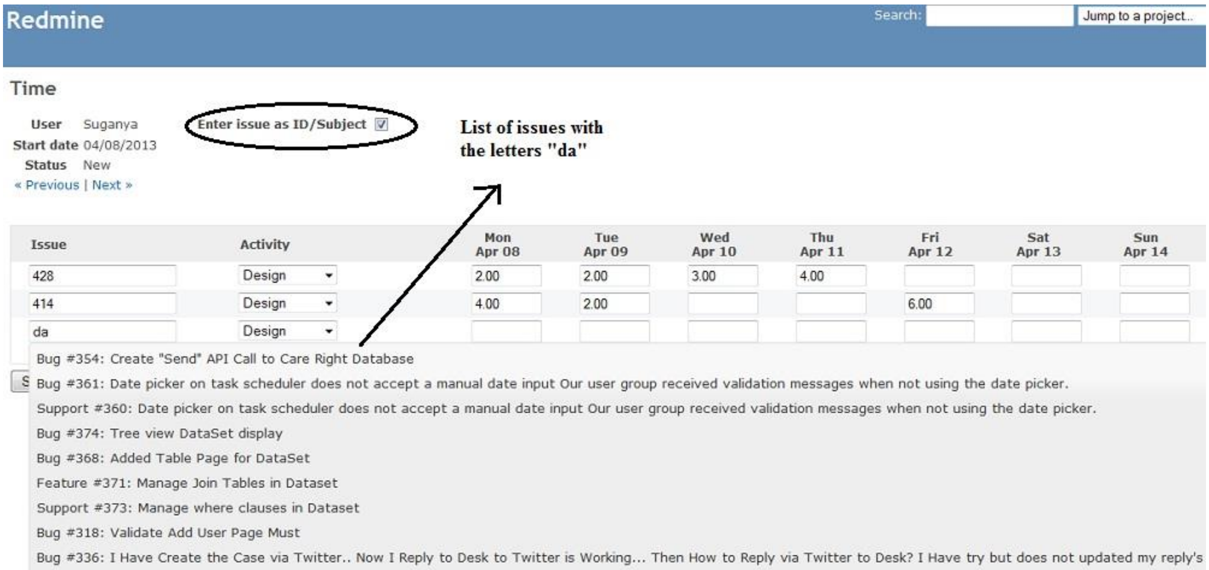
The number of previous weeks to be considered can be configured using the setting "**Number of Weeks to consider for previous week template**".



8.2.3 Issue input format

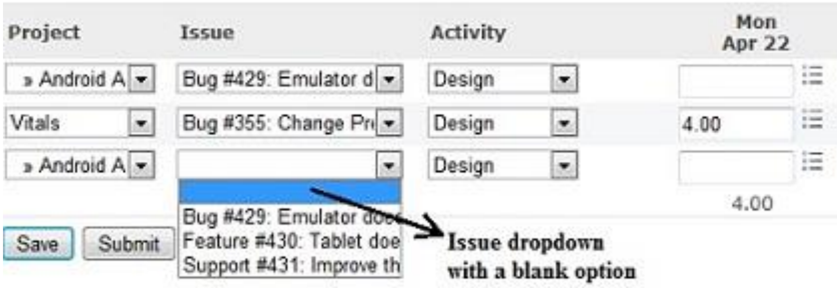
By default, the issues will be listed as dropdown in time & expense sheet. Issues can be entered as ID or Subject by enabling the configuration "**Enter issue as ID/Subject**". If enabled, a checkbox "**Enter issue as ID/Subject**" appears on the time & expense sheet.

If the checkbox on the time & expense sheet is checked, then both the project and issue dropdown will be replaced by an issue textbox which can be used for entering either issue id or issue subject and complemented by auto completion



8.2.4 Allow Blank Issue

This Time & Expense entries can be made directly to a project without selecting an issue and this configuration "**Allow Blank Issue**" enables that. If the setting is enabled, then the issue dropdown in time & expense sheet will contain a blank option.

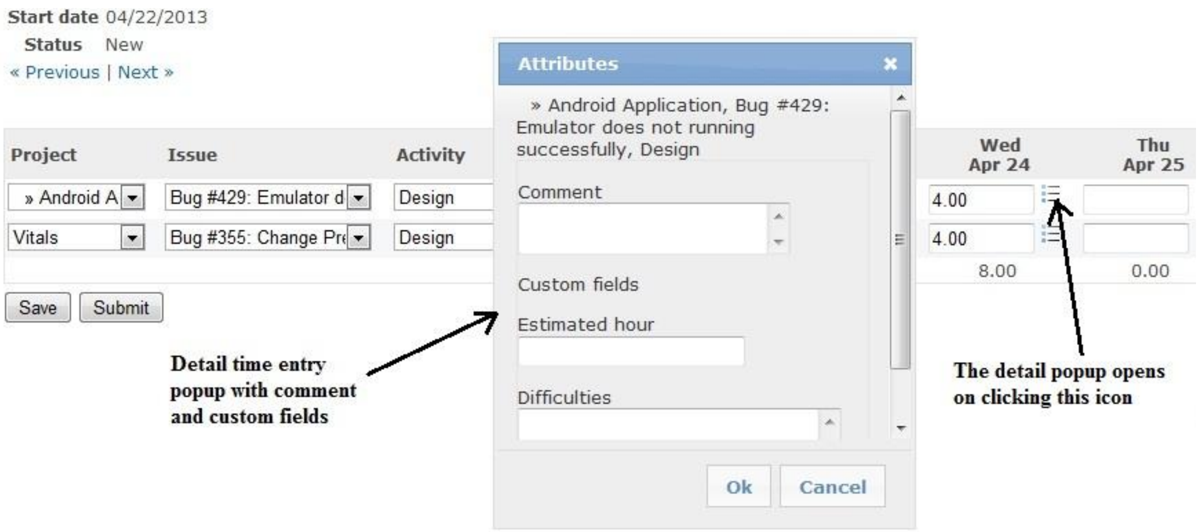


8.2.5 Enter comment in row

Comments on the Time & expense entries can be made from the row using this setting "**Enter comment in row**". This setting allows for one common comment for all entries of a unique combination of project, issue and activity. If this setting is enabled, there will be a textbox for comment in addition to project, issue and activity dropdown.

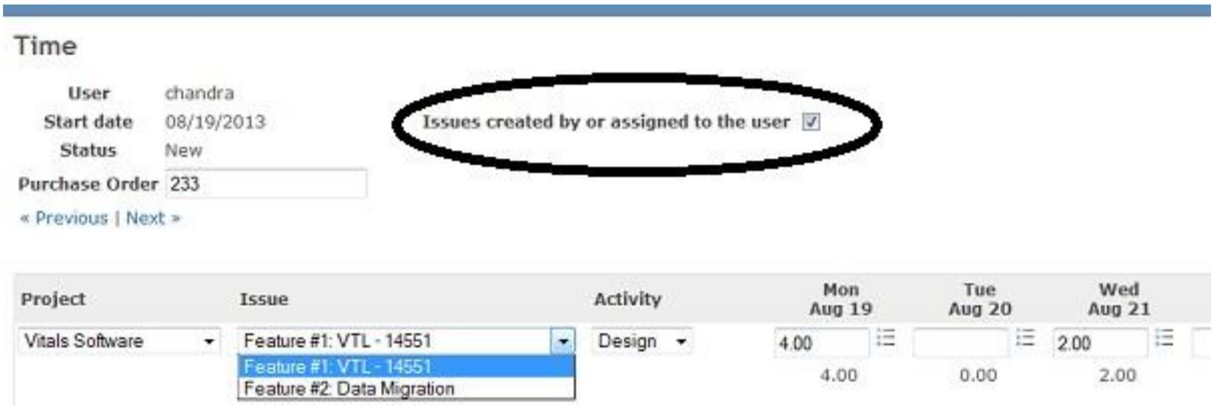
8.2.6 Use detail time entry popup

The setting "**Use Detail Time Entry Popup**" can be used for entering additional details like comments and custom fields on a time & expense entry. If this setting is enabled there will be an icon next to the entry textbox for popping up a detail dialog box.



8.2.7 Allow User Filtering to My Issues.

The setting "**Allow User Filtering to My Issues**" is used to filter issues which are assigned to them or created by them in time and expense sheet page. If the setting is enabled, then the user will be allowed to override the "Issue Visibility" setting of Redmine core

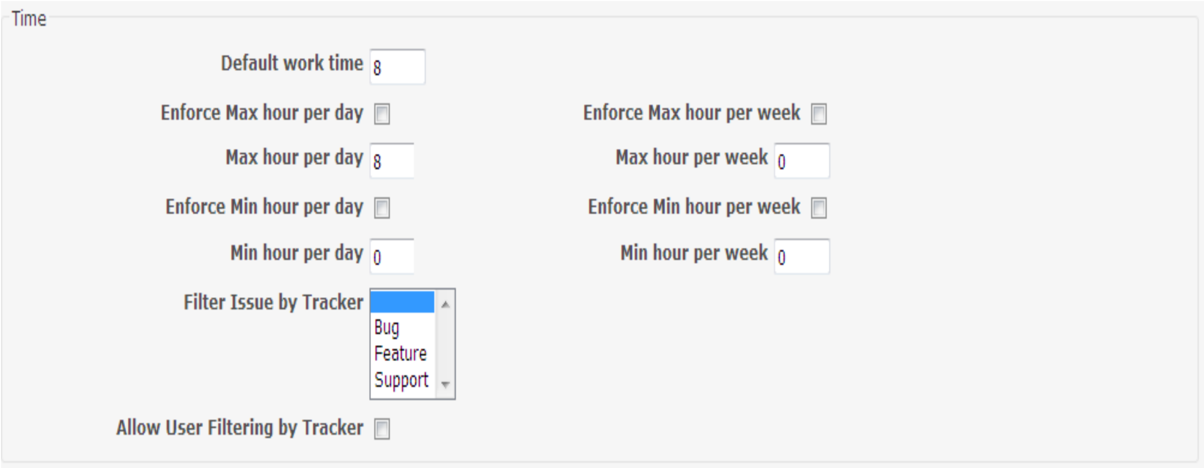


8.2.8 T&E Admin Groups

The user group configured as "**T&E Admin Groups**" can view, modify and approve time and expense sheets without needing to have time tracking permissions.

8.2.9 Time Settings

The settings which are defined under this section are only applicable to Time sheets.



8.2.10 Default work time

The setting "**Default work time"** is used to define the standard work time for a day.

8.2.11 Max hour

Maximum hour for a day can be configured using the "**Max hour per day**". This is used to limit the number of hours entered by a project member for a particular day.

8.2.12 Enforce Max hour

If the setting "**Enforce Max hour per week/day**" is enabled, then validation will be done to check if the entered time per week/day is above the configured "**Max hour per week/day**". Min hour
Minimum hour for a day can be configured using the "**Min hour per week/day**".

8.2.13 Enforce Min hour

If the setting "**Enforce Min hour per week/day**" is enabled, then validation will be done to check if the entered time per week/day is below the configured "**Min hour per week/day**". Validation will be done only for working days, for the non-working days validation will be done only when user enters time.
Note:

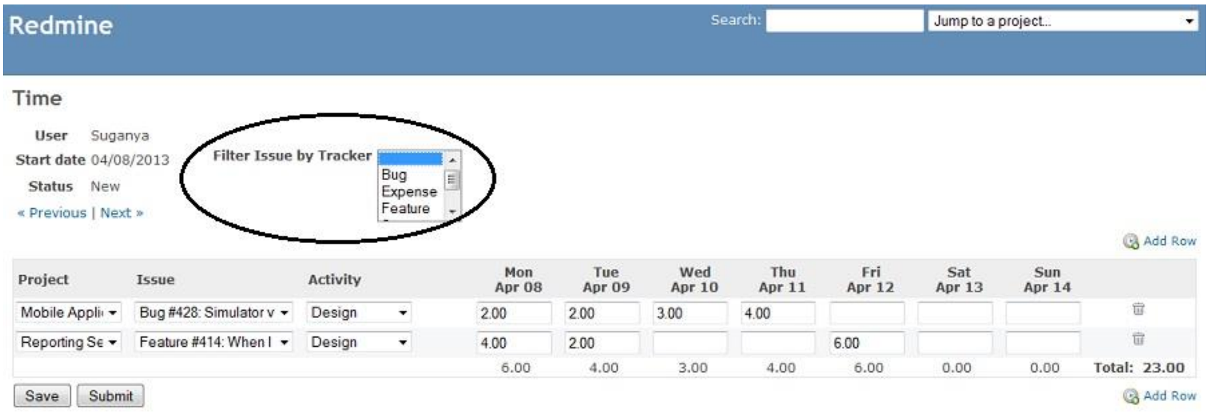
1. The min and max configurations are only applicable to timesheet.
2. Non working days can be configured by Administrators (Administration ➔ Settings ➔ Issue tracking ➔ Non-working days).
3. Min hour settings are applicable only when approval system is enabled
4. By default, the max hour is 8 and min hour is 0

8.2.14 Filter Issue by Tracker

Tracker is basically used to categorize issues like bug, support etc. This setting "**Filter Issue by Tracker**" is set separately for time and expense. This setting is used to restrict entries for a particular set of trackers. Only the issues from the configured trackers will be listed in the issue dropdown in the time & expense sheet. If no tracker is configured then all issues will be listed in issue dropdown.

8.2.15 Allow User Filtering by Tracker

If "**Allow User Filtering by Tracker**" is enabled then user will be allowed to override the tracker filters set on the settings page.



8.2.16 Enter custom field in row1

The spent time custom fields are entered through detail popup by default. The setting "**Enter custom field in row1**" can be used to enter a spent time custom field from the row. If this setting is enabled, there will be a textbox for the configured custom field in the row.

8.2.17 Enter custom field in row2

Same as Enter custom field in row1

Note: Only two spent time custom fields can be configured to be in the row.

8.2.18 Expense Settings

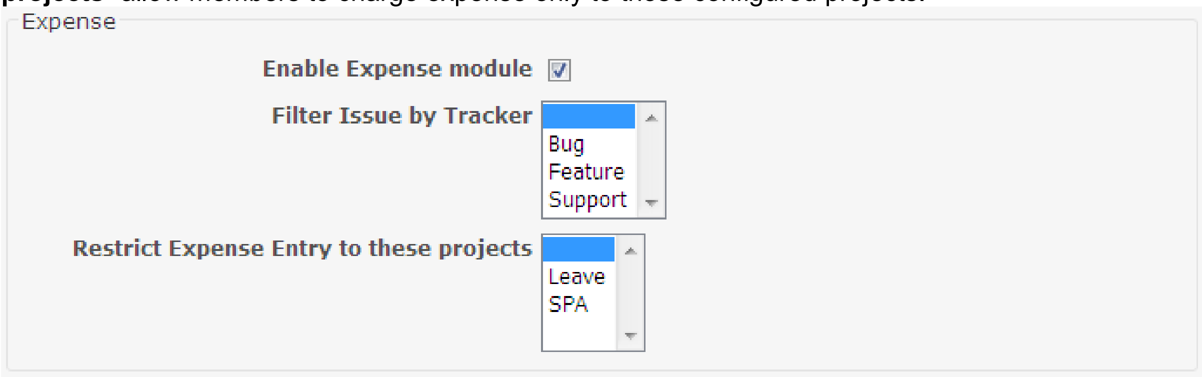
This section contains settings that are applicable to expense sheets.

8.2.19 Enable Expense

This setting can be used to enable / disable expense module.

8.2.20 Expense project

Separate list of projects can be configured for Expenses. This setting "**Restrict Expense Entry to these projects**" allow members to charge expense only to those configured projects.

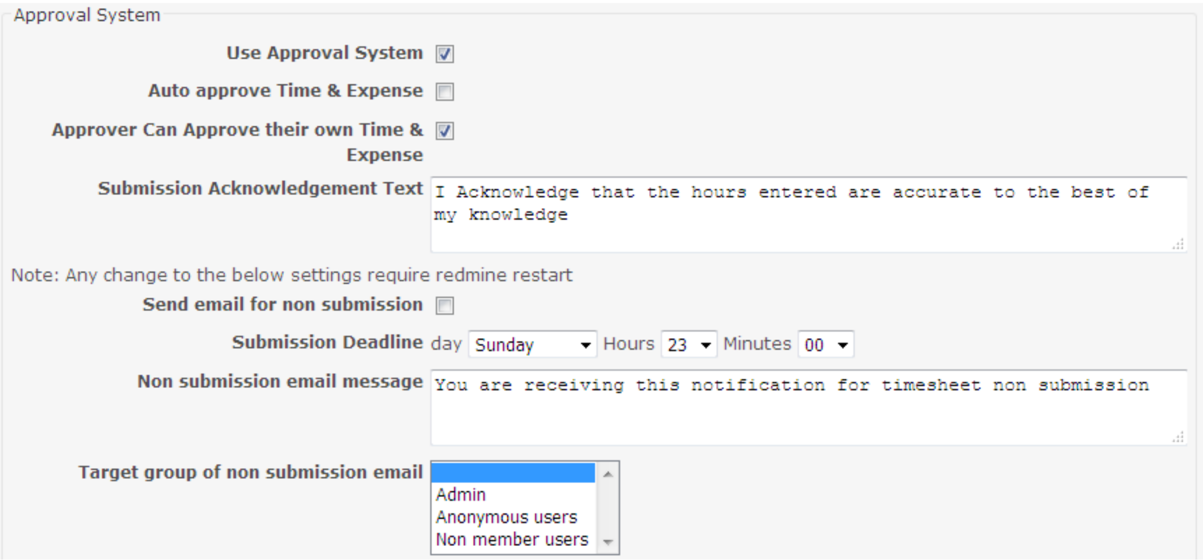


8.2.21 Filter issue by tracker

This is same as section 6.5.5, but in the context of an expense.

8.2.22 Approval Settings

Approval System is common to both Time and Expense except for email notification on non-submission which is applicable only to Time.



8.2.23 Use Approval System

If "**Use Approval System**" checkbox is checked, then approval system is used.

8.2.24 Auto approve

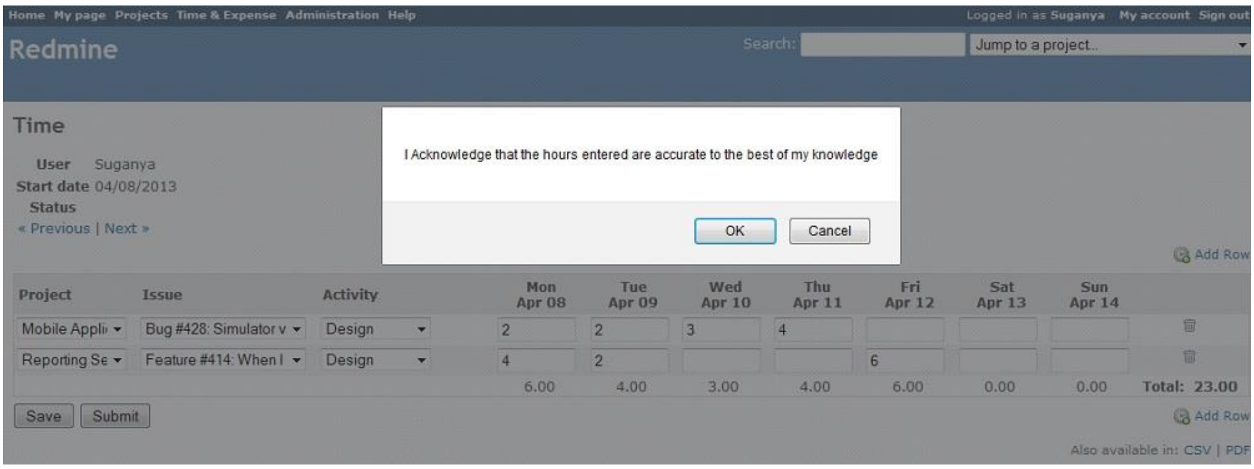
If the setting "**Auto approve Time & Expense**" is enabled, then the time & expense sheet gets automatically approved by the system upon submission. The project member will not be able to unsubmit his time/expense sheet since it goes to approved status immediately.

8.2.25 Approve own time/expense sheet

If the setting "**Approver Can Approve their own Time & Expense**" is enabled, then the project member with "Approve time logs" along with "Edit time logs" and "Log spent time" permission can approve/reject his own time & expense sheet.

8.2.26 Submission ask text

The text given in the "**Submission Acknowledgement Text**" is the message shown during Time & Expense submission. (Please see screenshot below)



8.2.27 Email Notification

The setting "**Send email for non submission"** is only for Time. If this setting is enabled, then an email notification is sent to the user about his non submission of timesheet for the previous week. Please note, this setting required rufus scheduler gem.

8.2.28 Submission deadline

Timesheet submission deadline can be configured using this setting. If the project member did not submit the timesheet before the configured ""**Submission Deadline**", then an email notification is sent only when the configuration "**Send email for non submission"** is enabled.

8.2.29 Non submission email message

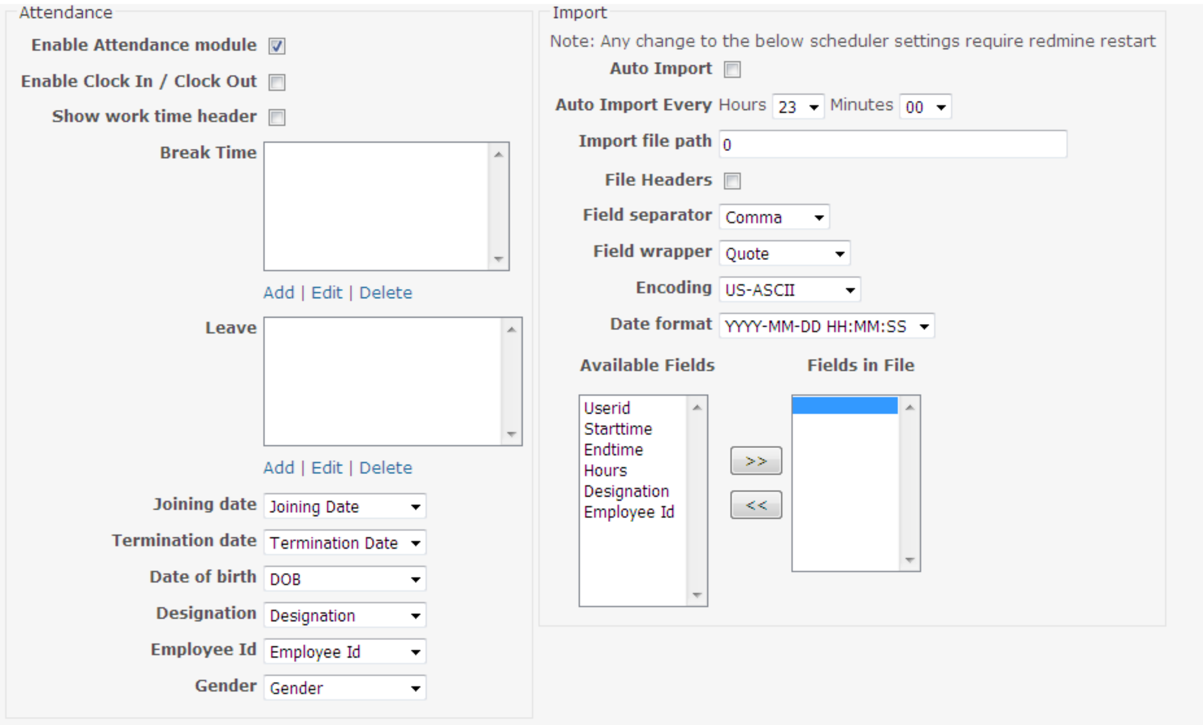
The text for non-submission timesheet notification email message can be configured using the setting "**Non submission email message**". The text given in this configuration will be used as the email message body along with the name of the project member, submission deadline, the week for which timesheet need to be submitted.

8.2.30 Target group of Non submission email

The selected user group will receive the email notification about non submission of timesheet for the previous week.

8.3 Attendance

This section contains settings that are applicable to Attendance.



8.3.1 Enable attendance module

This setting can be used to enable / disable attendance module.

8.3.2 Enable clock in / clock out

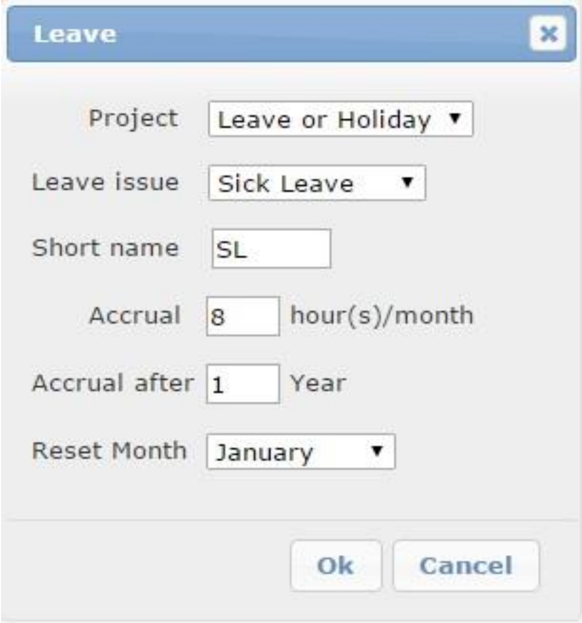
This setting can be used to enable and disable attendance module for Time & Attendance.

8.3.3 Break Time

Break time for a day like lunch intervals can be configured.

8.3.4 Leave

Leaves can be configured with short name, accrual, accrual after, reset month.



8.3.5 Miscellaneous fields

User custom fields can be mapped to the following settings

- Join Date
- Date of birth
- Employee Id
- Designation
- Termination Date
- Gender

8.3.6 Auto import

Attendance data can be automatically imported from an external system / Attendance Devices / Time Clocks. The following file formats are supported.

Type 1:

Userid	Punchtime
1	10:00
2	10:00
1	20:00
2	20:00

Type 2:

Userid	Clockintime	Clockouttime
1	10:00	20:00

2	10:15	18:15
3	10:30	19:30

Type 3:

Userid	Clockintime	Clockouttime	hours
1	10:00	20:00	10.0
2	10:15	18:15	8.0
3	10:30	19:30	9.0

8.3.7 Auto Import Every

This is the frequency of the Attendance Import Scheduler,. Auto import will be performed for the given interval of time.

8.3.8 Import File Path

This setting is used to locate the file directory for attendance auto import.

8.3.9 File Headers

This setting is used to determine whether import file contains header or not.

8.3.10 Field Separator

The Type of field separator used in import file .

8.3.11 Field Wrapper

The type of field wrapper used in import file.

8.3.12 Encoding

The type of encoding used in import file

8.3.13 Date format

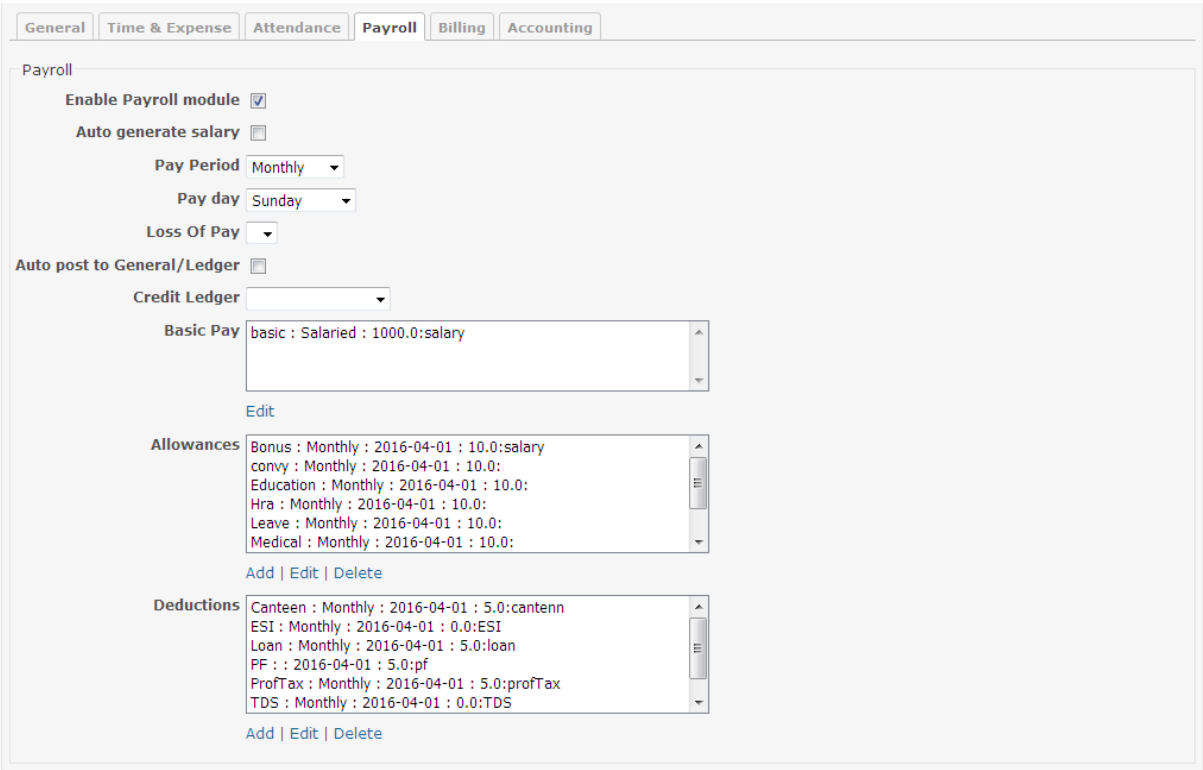
The date time format used in import file.

8.3.14 Available Fields and Fields in File

This settings shows the list of available fields,. user can pick the fields used in the import file from the available fields .

8.4 Payroll

This section contains settings that are applicable to Payroll.



8.4.1 Enable Payroll module
This setting can be used to enable / disable payroll module.

8.4.2 Auto generate salary
The scheduler job runs automatically to generate the salary at the end of pay period.

8.4.3 Currency
This settings can be used to set currency of payroll.

8.4.4 Pay Period
User can set the pay period.

8.4.5 Pay day
If the pay period is weekly or bi-weekly then the user set the pay day.

8.4.6 Loss of pay
The selected leave (from Attendance Module) will be used as loss of pay.

8.4.7 Financial year start
They user can set the financial start.

8.4.8 Auto post to General/Ledger
When salary is generated, it will automatically post salary to General Ledger

8.4.9 Credit Ledger

Select the appropriate CL credit ledger for the above setting

8.4.10 Basic pay

Basic pay can be configured with name, salary type, debit Ledger and factor. Factor is nothing but the wages, it can be a hourly rate or wages.

8.4.11 Allowances

Allowance can be configured with name, frequency, start date, debit ledger, depends on and factor.

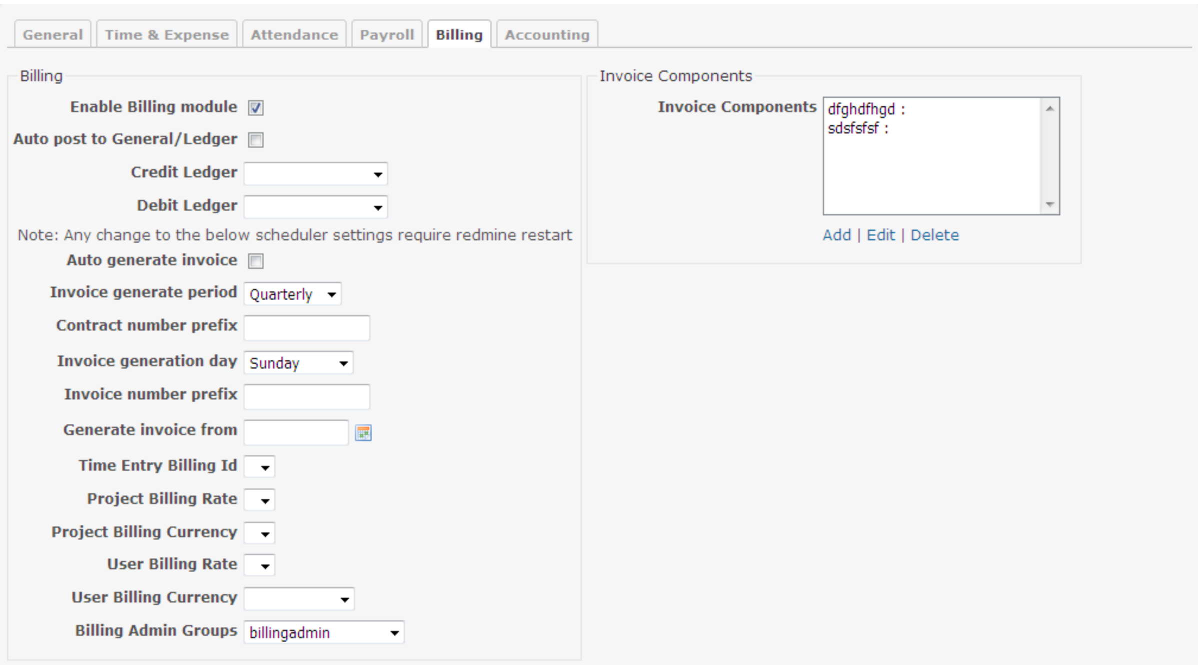
#	field	description
1	name	Name of the allowance/deduction
2	Frequency	Frequency of the allowance, for monthly allowances, it can be left as blank
3	Start date	Applicable only when a frequency is set
4	Dr/Cr Ledger	Select the appropriate GL ledger
5	Depends on	Selected the field on which this depends on
6	Factor	Factor can be either a % or an amount

8.4.12 Deduction

Deduction can be configured with name, frequency, start date, depend on and factor, please refer the table above..

8.5 Billing

This section contains settings that are applicable to Billing module.



8.5.1 Enable Billing module

This setting can be used to enable / disable billing module.

8.5.2 Auto post to General/Ledger

When generate invoice post invoice to financial transaction .

8.5.3 Credit Ledger

Select the appropriate transaction credit ledger.

8.5.4 Debit Ledger

Select the appropriate transaction debit ledger.

8.5.5 Auto generate invoice

The scheduler job runs automatically to generate the invoice at the end of invoice period.

8.5.6 Invoice generation period

User can set the invoice generation period (Quarterly, Monthly, bi-weeklu, weekly etc).

8.5.7 Contract number prefix

This setting can be used to add prefix of contract number.

8.5.8 Invoice generation day

If the invoice generation period is weekly or bi-weekly then the user should set the invoice generation day.

8.5.9 Invoice number prefix

This setting can be used to add prefix of invoice number.

8.5.10 Generate Invoice from

The user can set the invoice start date for the whole of application

8.5.11 Time Entry Billing id

The user have to select spent time custom field to store the billed invoice item id for the appropriate spent time.

8.5.12 Rate fields

The Billing rate can come from Project or User. Project custom fields can be mapped to the following settings

- Project Billing Rate
- Project Billing Currency

User custom fields can be mapped to the following settings

- User Billing Rate
- User Billing Currency

8.5.13 Billing Admin group

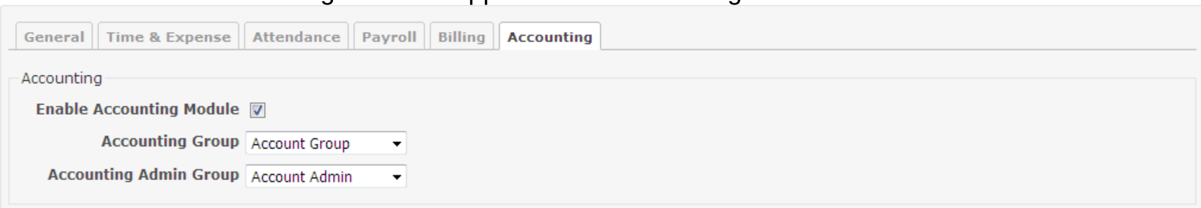
The user group configured as "**Billing Admin Groups**" can view, modify invoices.

8.5.14 Invoice Components

The user can configure the invoice components, which will be included in the printed invoice.

8.6 Accounting

This section contains settings that are applicable to Accounting module.



8.6.1 Enable Accounting module

This setting can be used to enable / disable Accounting module

8.6.2 Accounting Group

The user group configured as "**Accounting Admin Groups**" can view, modify GL transaction.

8.6.2 Accounting Admin Group

The user group configured as "**Accounting Admin Groups**" can view, modify GL transaction and ledgers.

8.7 Approve Time Logs Permission

A new permission is defined for time/expense sheets approval under "Time tracking" section. The user with "**Approve time logs"** permission along with "**Log spent time"** and "**Edit time logs**" permission will be allowed to approve, unapprove and reject time and expense sheets.

9. Redmine Settings

There are certain settings of redmine which influence the functionality of the Time & Attendance plugin.

9.1 Permissions

The roles (manager, developer, reporter etc.) defined in redmine are assigned with a set of permissions. Administrators can define roles and configure its permission by navigating to **Administration → Roles and permissions**. A user can have different roles for different projects and also a project member can have multiple roles assigned for single project.

Following are some of the privileges defined in time tracking section **[An extract from Redmine User Guide]**

Log spent time - Allow user to log time on the project
View spent time - Allow user to view the time logs on the project
Edit time logs - Allow user to edit any time log
Edit own time logs - Edit own time logs

The rules for Roles and permission in the context of **Time & Attendance** is as follows

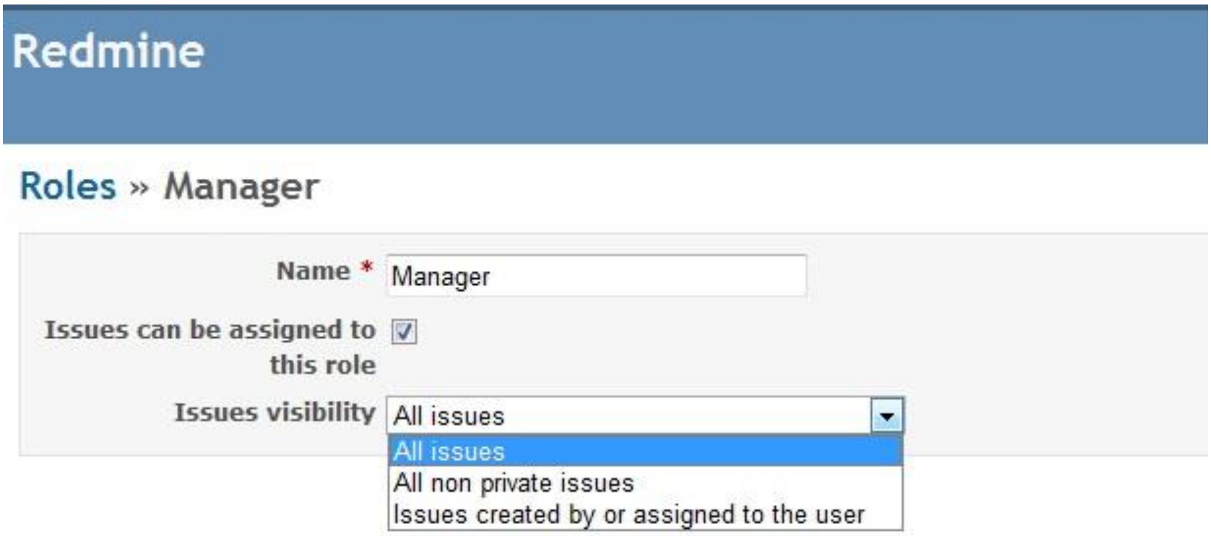
#	Feature	View spent time	Log spent time	Edit own time logs	Edit time logs	Approve time logs
1	Time & Expense List Page	X	X			
2	New Time & Expense Sheet		X			
3	Edit Time & Expense sheet			X		
4	Edit Other's Time & Expense Sheet				X	
5	Approve Time & Expense					X

Note: There are no separate permissions for expense; it uses the permission from spent time.

9.1.1 Issue Visibility

[An extract from Redmine User Guide]
Assuming that the role includes the *View Issues* permission, the following rules apply to the issues of the projects the user is tied to through it:

All issues - the user can see all issues. This is the default.
All non-private issues - the user can see all issues which are not marked as private.
Issues created by or assigned to the user - the user can only see issues created by or assigned to

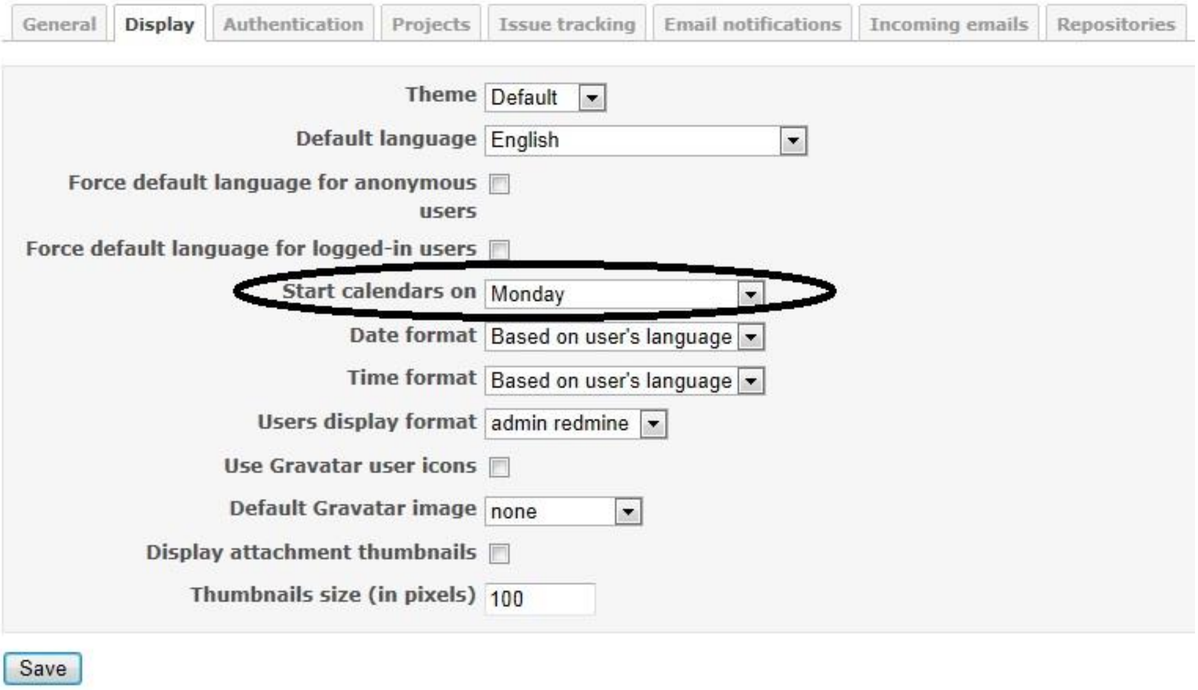


The issue dropdown in time & expense sheet is filled based on Issue Visibility for the role assigned to project members.

9.2 Start of Week

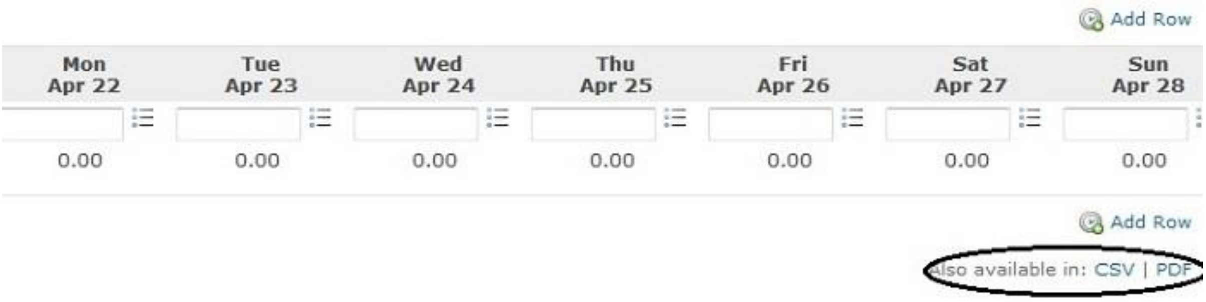
The start of the week on the time & expense sheet can be configured to "Monday", "Saturday", "Sunday" or "Based on user's language". If "Based on user's language" is set, then start of the week will be the day defined in language file. Start of the week can be configured by navigating to **Administration**

➔ **Settings** ➔ **Display** ➔ **Start calendars on**



10. PDF & CSV

The time & expense sheet can be exported into pdf or csv format. To take a csv report click on the csv link and for the pdf report click on the pdf link.



11. REST API

Time & Attendance REST API supports both XML and JSON. It supports following functionalities.

- Get list of time/expense sheets
- Create time/expense sheet
- Get a time/expense sheet
- Update a time/expense sheet
- Delete a time/expense sheet
- Delete a time/expense entries

Time & Attendance API requires authentication for each request. The API validates the user and responds with 401 Unauthorized if user did not have required privileges. For more information on REST API configuration, please refer to the Redmine User Guide.

11.1 List Time/Expense Sheets

List of time and expense sheet can be retrieved using the list API. By default, it returns time and expense sheets for the current month if the parameters **from** and **to** is not specified. If **from** and **to** is specified then time/expense sheet for that particular date range will be retrieved.

Request Type	URL	Response
Time		
GET	/wktime/index.xml?user_id=9999&from=2013-01-01 &to=2013-08-01	list of timesheets of a user as xml/json
	/wktime/index.json?user_id=9999	
Expense		
GET	/wkexpense/index.xml?user_id=9999 &from=2013-01-01&to=2013-08-01	list of expense sheets of a user as xml/json
	/wkexpense/index.json?user_id=9999 &from=2013-01-01&to=2013-08-01&limit=25&offset=0	

Parameters		
user_id	Required	user_id for whom, list of time/expense sheet is to be retrieved. If 0, then list of time/expense sheets for all user is retrieved.
project_id	Optional	Use this parameter, if user_id = 0 is used i.e., to get list of time/expense sheets of all user under one project.
from	Optional	Specifies the start of the date range
to	Optional	Specifies the end of the date range
offset	Optional.	The offset of the first item to retrieve
limit	Optional	Number of records to be retrieved (default is 25)

Sample XML Response (for Time)

```
<?xml version="1.0" encoding="UTF-8"?>
<wk_times total_count="1" offset="0" limit="25" type="array">
  <wk_time>
    <user id="5" name="Chandra Durairaj"/>
    <hours>10.0</hours>
    <startdate>2013-08-19</startdate>
    <status>n</status>
  </wk_time>
</wk_times>
```

Sample JSON Response (for Time)

```
{"wk_times":
        [
                {
                 "user":{"id":5,"name":"Chandra Durairaj"},
                 "hours":10.0,
                 "startdate":"2013-08-19",
                 "status":"n"
                }
        ],
        "total_count":1,
        "offset":0,
        "limit":25
}
```

11.2 Create Time/Expense Sheet

Time and Expense sheet can be created using the create API.

Request Type	URL	Response
Time		
POST	/wktime/update.xml?wktime_save=Save	200 OK. Creates a timesheet
	/wktime/update.xml?wktime_submit=Submit	200 OK. Creates and set timesheet to submitted state
Expense		
POST	/wkexpense/update.xml?wktime_save=Save	200 OK. Creates an expensesheet
	/wkexpense/update.json?wktime_submit=Submit	200 OK. Creates and set expensesheet to submitted state

Sample XML data to be posted (for Time)


```
<?xml version="1.0" encoding="UTF-8"?>
<wk_time>
 <user name="Chandra Durairaj" id="5"/>
 <startday>2013-08-19</startday>
 <status>New</status>
 <total>6.0</total>
 <custom_fields type="array">
   <custom_field name="Purchase Order" id="12">
     <value/>
   </custom_field>
 </custom_fields>
 <time_entries type="array">
   <time_entry>
     <project name="Vitals Software" id="1"/>
     <issue id="1"/>
     <user name="Chandra Durairaj" id="5"/>
     <activity name="Design" id="10"/>
     <hours>4.0</hours>
     <comments/>
     <spent_on>2013-08-19</spent_on>
     <custom_fields type="array">
       <custom_field name="Difficulties" id="15">
         <value/>
       </custom_field>
     </custom_fields>
   </time_entry>
   <time_entry>
     <project name="Vitals Software" id="1"/>
     <issue id="1"/>
     <user name="Chandra Durairaj" id="5"/>
     <activity name="Design" id="10"/>
     <hours>2.0</hours>
     <comments/>
     <spent_on>2013-08-21</spent_on>
     <custom_fields type="array">
       <custom_field name="Difficulties" id="15">
```

```
      &lt;value/&gt;
     &lt;/custom_field&gt;
    &lt;/custom_fields&gt;
   &lt;/time_entry&gt;
  &lt;/time_entries&gt;
&lt;/wk_time&gt;
```

Sample XML data to be posted (For Expense)

```
&lt;?xml version="1.0" encoding="utf-8"?&gt;
&lt;wk_expense&gt;
  &lt;user id="5" name="Chandra Durairaj"/&gt;
  &lt;startday&gt;2013-08-26&lt;/startday&gt;
  &lt;status&gt;New&lt;/status&gt;
  &lt;total&gt;75.0&lt;/total&gt;
  &lt;wk_expense_entries type="array"&gt;
    &lt;wk_expense_entry&gt;
      &lt;id&gt;84&lt;/id&gt;
      &lt;project id="22" name="Expense"/&gt;
      &lt;issue id="50"/&gt;
      &lt;user id="5" name="Chandra Durairaj"/&gt;
      &lt;activity id="8" name="Design"/&gt;
      &lt;amount&gt;25.0&lt;/amount&gt;
      &lt;currency&gt;$&lt;/currency&gt;
      &lt;comments/&gt;
      &lt;spent_on&gt;2013-08-26&lt;/spent_on&gt;
    &lt;/wk_expense_entry&gt;
    &lt;wk_expense_entry&gt;
      &lt;id&gt;85&lt;/id&gt;
      &lt;project id="22" name="Expense"/&gt;
      &lt;issue id="51"/&gt;
      &lt;user id="5" name="Chandra Durairaj"/&gt;
      &lt;activity id="8" name="Design"/&gt;
      &lt;amount&gt;50.0&lt;/amount&gt;
      &lt;currency&gt;$&lt;/currency&gt;
      &lt;comments/&gt;
      &lt;spent_on&gt;2013-08-27&lt;/spent_on&gt;
    &lt;/wk_expense_entry&gt;
  &lt;/wk_expense_entries&gt;
&lt;/wk_expense&gt;
```

11.3 Get Time/Expense Sheet

Request Type	URL	Response
Time		
GET	/wktime/edit.xml?user_id=9999&startday=2013-07-29	Timesheet of a user for a week
	/wktime/edit.json?user_id=9999&startday=2013-07-29	
Expense		
GET	/wkexpense/edit.xml?user_id=9999&startday=2013-07-29	Expensesheet of a user for a week
	/wkexpense/edit.json?user_id=9999&startday=2013-07-29	

Parameters

user_id	Required	User_id for whom time/expense sheet is to be retrieved
startday	Required	Specifies the start of the week

Sample XML Response (for Time)


```
<?xml version="1.0" encoding="UTF-8"?>
<wk_time>
 <user name="Chandra Durairaj" id="5"/>
 <startday>2013-08-19</startday>
 <status>New</status>
 <total>6.0</total>
 <custom_fields type="array">
  <custom_field name="Purchase Order" id="12">
   <value/>
  </custom_field>
 </custom_fields>
 <time_entries type="array">
  <time_entry>
   <id>1506</id>
   <project name="Vitals Software" id="1"/>
   <issue id="1"/>
   <user name="Chandra Durairaj" id="5"/>
   <activity name="Design" id="10"/>
   <hours>4.0</hours>
   <comments/>
   <spent_on>2013-08-19</spent_on>
   <custom_fields type="array">
    <custom_field name="Difficulties" id="15">
     <value/>
    </custom_field>
   </custom_fields>
  </time_entry>
  <time_entry>
   <id>1507</id>
   <project name="Vitals Software" id="1"/>
   <issue id="1"/>
   <user name="Chandra Durairaj" id="5"/>
   <activity name="Design" id="10"/>
   <hours>2.0</hours>
   <comments/>
   <spent_on>2013-08-21</spent_on>
   <custom_fields type="array">
    <custom_field name="Difficulties" id="15">
     <value/>
    </custom_field>
   </custom_fields>
  </time_entry>
 </time_entries>
</wk_time>
```


Sample JSON Response


```
{"wk_time":
        {
                "user":{"id":5,"name":"Chandra Durairaj"},
                "startday":"2013-08-19",
                "status":"New",
```

"total":6.0,
"custom_fields":[
{"id":12,"name":"Purchase Order","value":"233"}
],
"time_entries":[
{
"id":1506,
"project":{"id":1,"name":"Vitals Software"},
"issue":{"id":1},
"user":{"id":5,"name":"Chandra Durairaj"},
"activity":{"id":10,"name":"Design"},
"hours":4.0,
"spent_on":"2013-08-19",
"custom_fields":[
{"id":15,"name":"Difficulties"}
]
},
{
"id":1507,
"project":{"id":1,"name":"Vitals Software"},
"issue":{"id":1},
"user":{"id":5,"name":"Chandra Durairaj"},
"activity":{"id":10,"name":"Design"},
"hours":2.0,
"spent_on":"2013-08-21",
"custom_fields":[
{"id":15,"name":"Difficulties"}
]
}]
}
}

11.4 Update Time/Expense Sheet

Time & Expense sheet can be updated suing update API. Any one of the following action and its value should be sent for the corresponding functionalities.

- wktime_save=Save
- wktime_submit=Submit
- wktime_unsubmit=Unsubmit
- wktime_approve=Approve
- wktime_reject=Reject
- wktime_unapprove=Unapprove

Request Type	URL	Response
Time		
POST	/wktime/update.xml?wktime_save=Save	200 OK. Updates a timesheet
	/wktime/update.xml?wktime_submit=Submit	200 OK. Update and set timesheet status to “Submitted”
	/wktime/update.xml? wktime_unsubmit=Unsubmit	200 OK. Updates the timesheet status to “New”
	/wktime/update.xml?wktime_approve=Approve	200 OK. Approves a timesheet

	/wktime/update.xml?wktime_reject=Reject	200 OK Rejects a timesheet
	/wktime/update.xml?wktime_unapprove=Unapprove	200 OK. Unapproves a timesheet
Expense		
POST	/wkexpense/update.xml?wktime_save=Save	200 OK. Updates an expensesheet
	/wkexpense/update.xml?wktime_submit=Submit	200 OK. Update and set timesheet status to “Submitted”
	/wkexpense/update.xml?wktime_unsubmit=Unsubmit	200 OK. Updates the expensesheet status to “New”
	/wkexpense/update.xml?wktime_approve=Approve	200 OK. Approves an expensesheet
	/wkexpense/update.json?wktime_reject=Reject	200 OK Rejects an expensesheet
	/wkexpense/update.xml?wktime_unapprove=Unapprove	200 OK. Unapproves an expensesheet

Note: If validation failure occurs, then API response will be **422 Unprocessable Entity** otherwise response will be **200 OK** for successful updates.

Sample XML data to be posted (for Time)
In the below sample, two time_entry object contains id and one did not have id, then API will update the two entries which has id and creates a new time_entry for which id is not specified.


```
<?xml version="1.0" encoding="UTF-8"?>
<wk_time>
 <user name="Chandra Durairaj" id="5"/>
 <startday>2013-08-19</startday>
 <custom_fields type="array">
  <custom_field name="Purchase Order" id="12">
   <value/>
  </custom_field>
         </custom_fields>
 <time_entries type="array">
  <time_entry>
   <id>1506</id>
   <project name="Vitals Software" id="1"/>
   <issue id="1"/>
   <user name="Chandra Durairaj" id="5"/>
   <activity name="Design" id="10"/>
   <hours>4.0</hours>
   <comments/>
   <spent_on>2013-08-19</spent_on>
   <custom_fields type="array">
    <custom_field name="Difficulties" id="15">
     <value/>
    </custom_field>
   </custom_fields>
  </time_entry>
  <time_entry>
   <id>1507</id>
   <project name="Vitals Software" id="1"/>
   <issue id="1"/>
```

```
      <user name="Chandra Durairaj" id="5"/>
      <activity name="Design" id="10"/>
      <hours>2.0</hours>
      <comments/>
      <spent_on>2013-08-21</spent_on>
      <custom_fields type="array">
        <custom_field name="Difficulties" id="15">
          <value/>
        </custom_field>
      </custom_fields>
    </time_entry>
    <time_entry>
      <project name="Vitals Software" id="1"/>
      <issue id="2"/>
      <user name="Chandra Durairaj" id="5"/>
      <activity name="Design" id="10"/>
      <hours>4.0</hours>
      <comments/>
      <spent_on>2013-08-20</spent_on>
      <custom_fields type="array">
        <custom_field name="Difficulties" id="15">
          <value/>
        </custom_field>
      </custom_fields>
    </time_entry>
  </time_entries>
</wk_time>
```


11.5 Delete Time/Expense Sheet

The project member with edit permission will be allowed to delete time and expense sheet using delete API.

Request Type	URL	Response
Time		
DELETE	/wktime/destroy.xml?user_id=9999&startday=2013-08-12	200 OK. Deletes a timesheet
	/wktime/destroy.json?user_id=9999&startday=2013-08-12	
Expense		
DELETE	/wkexpense/destroy.xml?user_id=9999&startday=2013-08-12	200 OK. Deletes an expensesheet
	/wkexpense/destroy.json?user_id=9999&startday=2013-08-12	

Parameters		
user_id	Required	user_id for whom time/expense sheet is to be deleted
startday	Required	Specifies the start of the week

11.6 Delete Time/Expense Entries

The project member with edit permission will be allowed to delete time and expense entries using deleteEntries API.

Request Type	URL	Response
Time		

DELETE	/wktime/deleteEntries.xml	200 OK. Deletes a time entries
	/wktime/deleteEntries.json	
Expense		
DELETE	/wkexpense/deleteEntries.xml	200 OK. Deletes an expense entries
	/wkexpense/deleteEntries.json	

Sample XML data to be posted (for Time)


```
<?xml version="1.0" encoding="utf-8"?>
<time_entries type="array">
 <time_entry>
  <id>1535</id>
  <project id="1" name="Vitals Software"/>
  <issue id="1"/>
  <user id="3" name="Suganya Thulasiraman"/>
  <activity id="10" name="Design"/>
  <hours>4.0</hours>
  <comments/>
  <spent_on>2013-12-23</spent_on>
  <custom_fields type="array">
   <custom_field id="15" name="Difficulties">
    <value/>
   </custom_field>
  </custom_fields>
 </time_entry>
 <time_entry>
  <id>1537</id>
  <project id="1" name="Vitals Software"/>
  <issue id="1"/>
  <user id="3" name="Suganya Thulasiraman"/>
  <activity id="10" name="Design"/>
  <hours>4.0</hours>
  <comments/>
  <spent_on>2013-12-25</spent_on>
  <custom_fields type="array">
   <custom_field id="15" name="Difficulties">
    <value/>
   </custom_field>
  </custom_fields>
 </time_entry>
</time_entries>
```


12. Code Hooks

T&E supports code hooks so it can be extended seamlessly. The following are the hooks

#	Name	Description	Context
1	view_te_filter	Used to specify filters for the time/expense sheet list page.	
2	view_member_dropdown	Used to fill member dropdown in New time/expense sheet page.	project_id
3	view_wktime_menu	Used to show or hide “Time & Attendance” menu.	
4	controller_project_member	Used to fill member dropdown for the selected	project_id

		project on project dropdown change.	
5	controller_group_member	Used to fill member dropdown for the selected group on group dropdown change	group_id
6	controller_get_member	Used to fill member dropdown on list page on page load.	filter_type
7	controller_check_permission	Used to check permission to view time/expense sheet.	
8	controller_check_approvable	Used to check permission to approve time/expense sheet.	
9	controller_edit_timelog_permission	Used to check permission for edit/delete time/expense log.	
10	controller_set_view_projects	Used to fill project dropdown in list page.	
11	controller_set_manage_projects	Used to fill project dropdown in new time/expense sheet page.	
12	controller_check_editable	Used to check whether time/expense sheet is editable.	editable, user
13	controller_check_locked	Used to check whether time/expense sheet is locked.	startdate
14	controller_get_manager	Used to get the manager of a member	user, approval
15	controller_get_permissible_projs	Used to get the allowed project for the user	user

13. Customization

For any Customization / Support, please contact us, our consulting team will be happy to help you

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Here are the Customizations we have done for our clients:

1. Monthly Calendar – Puny Human
2. Supervisor Approvals – Fotonation

14. Troubleshooting

1. *The issues associated with each project do not show up in the drop down list*
   This might be the issue visibility configuration issue. Check under Administration ➔ Roles and Permissions➔ Edit user role ➔ Issue Visibility.
   (For further detail refer section 5.1.1)

2. *Is it possible to change the default currency of expenses*
   First one from the currency dropdown is the default. To have the currency of your choice to be the default in currency dropdown, add the following lines within number in the language file (for e.g., config/locale/cs.yml)

```
currency:
          format:
          format:"%u%n"
          unit: "CZK"
```

3. *There is no submit button*

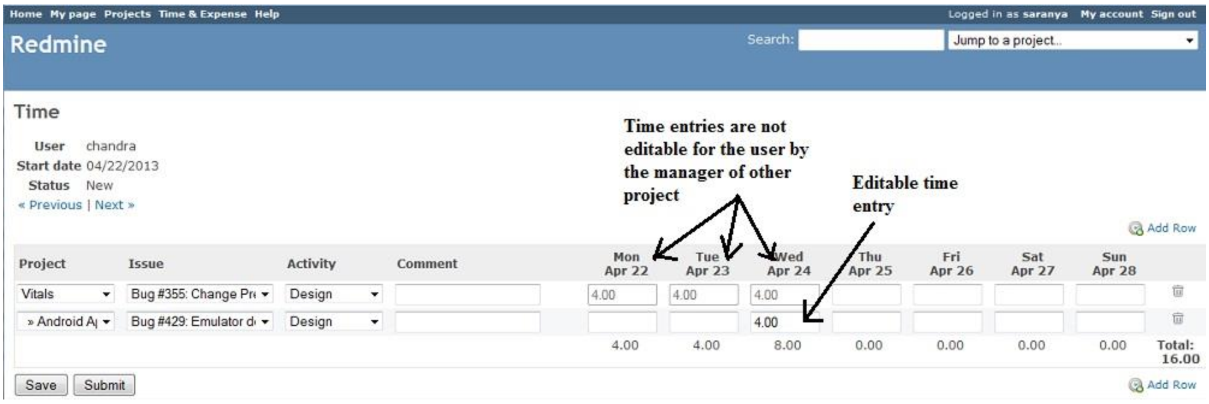
The submit button will be visible only when "Approval System" is enabled.

4. *How to approve the manager time-sheet?*
   If the setting "Approve own time/expense sheet" is enabled, then the manager can approve his own timesheet.
5. *Why is the plugin not maintaining comments separately for each time entry?*
   If we have set "Enter comment in row", it will allow only one comment per row. The timesheet will allow only one combination of project, issue and activity on multiple rows. To allow for separate comments per time entry, do not use the setting "Enter comment in row".

6. *The pdf export is not working. It is showing Internal error*

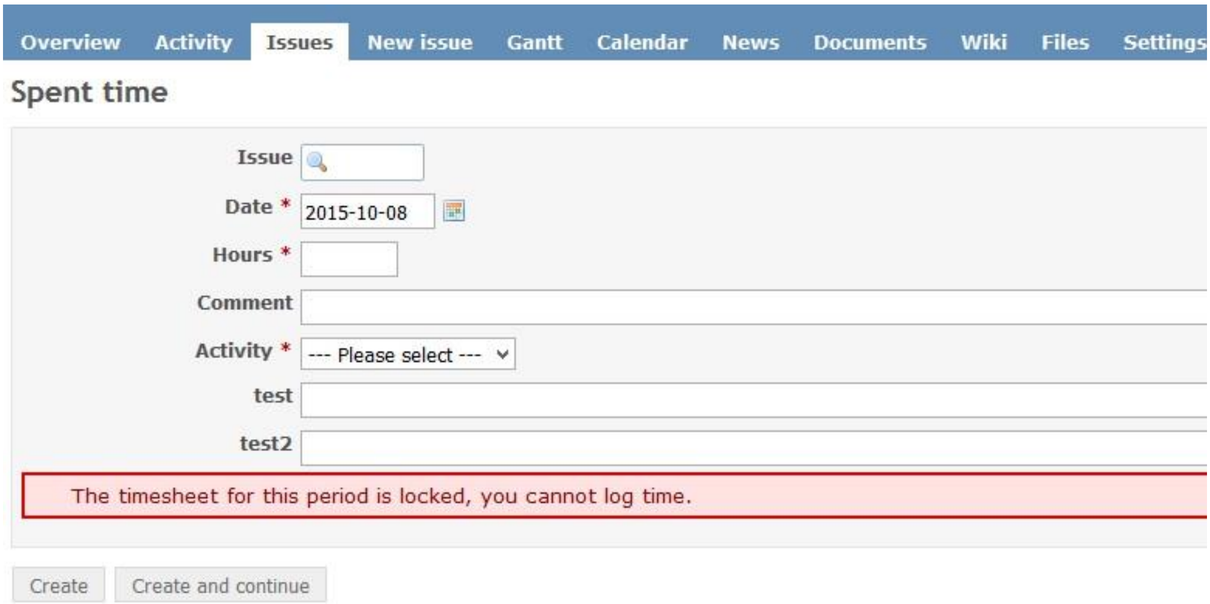
   The rmagick gem is required for displaying the logo in the pdf. If the rmagick gem is not installed, this error is encountered. Other alternative is to remove the logo from the pdf. To remove the logo, go to the plugin configuration page and empty the report logo field.

7. *Some of the time entries are disabled on edit for project manager*
   The project manager (with "Edit time logs" permission) can add/edit a time & expense sheet for their project members.



8. *Can we log time using core Redmine when a Time & Expense is in approved state ?*
   Apart from the Time & Expense plugin, there are two other ways of logging time
   - Project ➔ Edit Project ➔ Log time
   - Project ➔ Edit Project ➔ Edit Issue ➔ Update

   There will be warning messages on both these pages if the timesheet was approved for that week and buttons 'Create' and 'Create and continue' will be disabled on log time page.


Overview
Activity
Issues
New issue
Gantt
Calendar
News
Documents
Wiki
Files
Settings
Spent time
Issue
Date *
2015-10-08
Hours *
Comment
Activity *
--- Please select ---
test
test2
The timesheet for this period is locked, you cannot log time.
Create
Create and continue