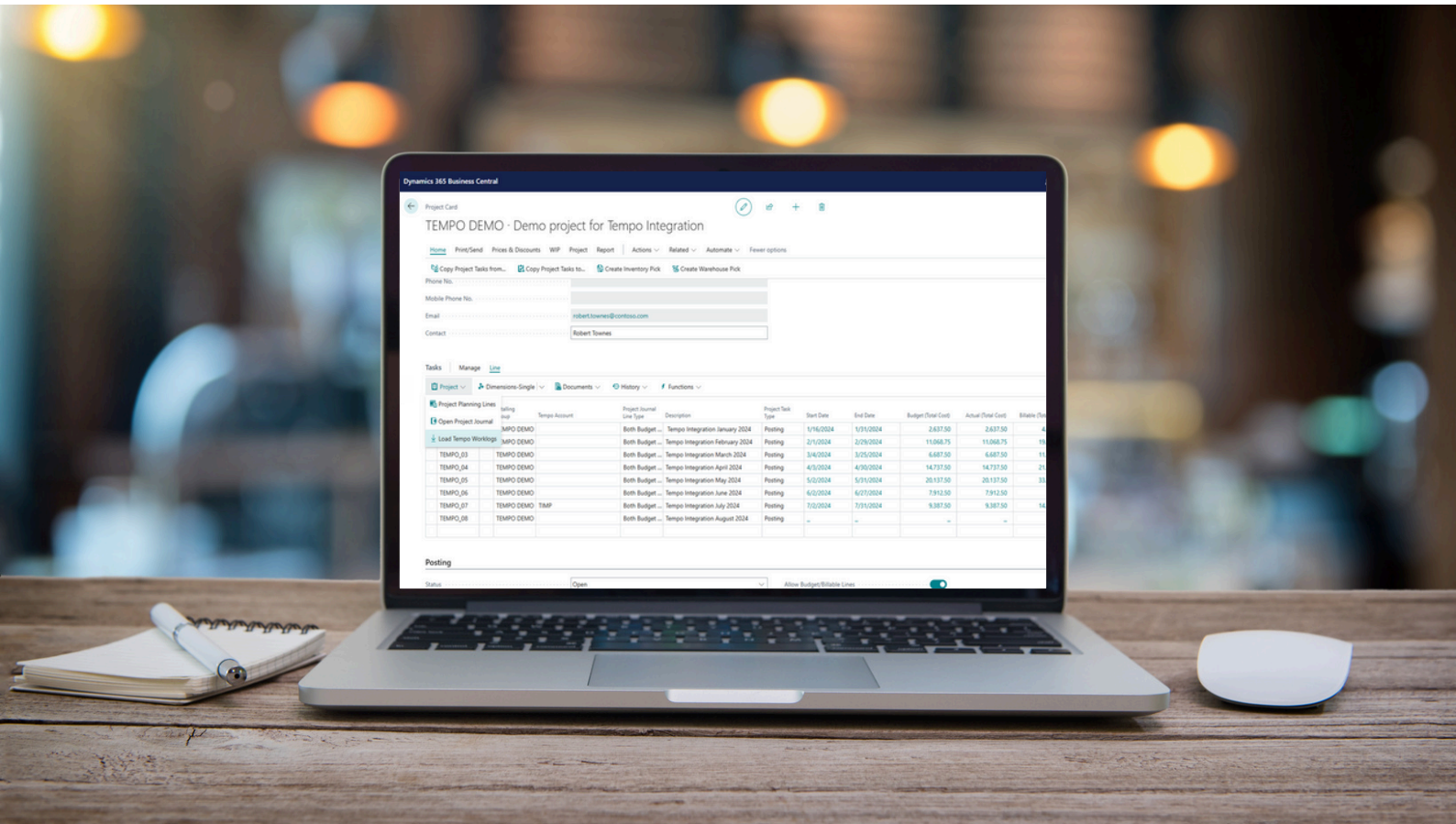
Tempo Integration

for D365 Business Central

onpoint

Tempo Integration is designed for project managers, project management departments, CFOs, and any project-based activities.

This tool seamlessly connects Jira, Tempo, and Microsoft Dynamics 365 Business Central, allowing you to track employee work, log time, manage costs, and bill clients efficiently. With Tempo Integration, you can compare costs and profitability, analyze profit rates, and make precise adjustments based on data-driven decisions.



What Tempo Integration Offers



Deep Financial Insights



Streamlined Cost Management



Efficient Workflow Integration



Customizable Configuration



Clear Invoicing



Detailed Archiving



Automatic Resource Creation



Secure Permissions



Simple Setup and Support

Take a closer look.

Deep Financial Insights

Gain a clear understanding of your project finances. Tempo Integration allows you to track costs, evaluate profitability, and make data-driven decisions. By comparing financial metrics and adjusting your approach based on these insights, you can enhance the financial health of your projects.

Streamlined Cost Management

Effortlessly manage project expenses and client billing. Tempo Integration ensures accurate tracking of work logs and costs, minimizing discrepancies and saving time. This streamlined approach simplifies budget management, helping you keep projects on track and within budget.

Efficient Workflow Integration

Tempo Integration merges smoothly with your existing processes, using the familiar Business Central UI. Worklogs are automatically downloaded into the standard project journal. Once posted, they are recorded in project planning lines or project and resource entries for billing or cost tracking. This approach ensures minimal disruption and easy adaptation to your current workflow.

There's even more.

Customizable Configuration

Tailor the integration to suit your specific needs. Align Jira projects with Business Central in a way that best suits your operations. Manage how long previous time period stay open after a new month begins, and define the checks the system performs before posting worklogs. Choose whether to use the integration for cost tracking, client billing, or both, based on what works best for your business.

Clear Invoicing

Simplify the invoicing process, even for large volumes of worklogs. Tempo Integration allows you to consolidate worklog lines into clear invoices, making it easier to manage and review billing. This feature helps ensure that your invoicing is accurate and straightforward.

Detailed Archiving

Keep a thorough record of all worklogs with our archiving system. This feature allows you to review past entries and changes, providing transparency and accountability. You can track every detail and maintain a complete history of your project data.

Benefits
that keep coming.

Automatic Resource Creation

Manage resources more effectively with automatic entries in Business Central. This feature eliminates manual data entry, reducing errors and saving time. Automatic resource management simplifies your workflow and keeps your data accurate.

Secure Permissions

Ensure your data remains protected with our permission settings. Only authorized users can make changes to worklog lines, safeguarding your information from unauthorized access and potential errors.

Simple Setup and Support

Begin using Tempo Integration quickly with our easy setup process. If you need additional assistance, our team is ready to help with step-by-step support. We're here to make sure the integration process is smooth and effective.

Getting Started with Tempo Integration

To effectively use Tempo Integration, you need to connect Jira, Tempo, and Microsoft Dynamics 365 Business Central. This integration enables you to track projects in Jira, log time in Tempo, and manage finances and sales in Business Central in a seamless and interconnected way. It connects and automates these processes, allowing you to focus on analyzing data and maintaining the financial health of your projects.

What You Need

- **Jira**: Ensure you are tracking your projects and tasks within Jira. This is where you'll log and manage project-related activities.
- **Tempo**: Use Tempo for logging time and managing worklogs. This integration will help synchronize this data with Business Central.
- **Business Central**: This is your hub for managing finances and sales. Integration with Tempo allows for seamless cost management and invoicing.

Setting Up the Integration:

Setting up the Tempo Integration involves a few key steps to ensure everything is connected and functioning smoothly:

Utilize the Setup Wizard:

1. **Open the Setup Wizard:** Find the Tempo Integration Setup Wizard in the Assisted Setup section. This tool will guide you through the configuration process.
2. **Default Values:** Start by configuring default settings for the automated process, including the job journal template and other resource-related defaults.
3. **Enter and Verify:** Input your connection credentials. The wizard will test the connection and check if all required permissions are in place.
4. **Set-up Automatic Download:** In the final step, we pre-configure the Job Queue Entry for daily worklog downloads. Simply set the Job Queue Entry status to Ready, and the integration is ready to use.

Fine-Tune Integration Settings:

Access Integration Settings: Navigate to the Tempo Integration Settings table in Business Central for more granular settings.
For a comprehensive guide on each step of the setup process, refer to the documentation of the setup wizard.

Tips for a Smooth Setup:

Choose the Right Personnel: Ideally, the setup should be handled by a technical user or an administrator with access to all relevant Jira projects and Tempo worklogs.

Leverage Tooltips: Throughout the setup process, use the in-system tooltips for additional guidance and examples of expected inputs.

FAQ

Finished our e-book and documentation but still have questions? We've gathered answers to the most frequently asked questions to ensure you have all the information you need.

Troubleshooting Worklog Downloads with Tempo Integration

If you're encountering issues downloading worklogs after installing Tempo Integration and your project journal appears empty, several factors could be causing this:

Check Tempo Integration Settings: Ensure your settings are correctly configured, even if you used our setup wizard.

Verify Project and Tempo Keys: Confirm that Jira Project Keys and Tempo Account Keys are correctly filled on the project cards. Ensure these values match exactly with those in Jira and Tempo, including case sensitivity for Tempo Account Keys.

Job Queue Status: Ensure the corresponding job queue entry is set to Ready. Check if the job queue entry has unexpectedly stopped running.

Job Queue Notifications: Business Central does not notify users when a job queue entry stops by default. We offer Job Queue Notifications to alert you via email.

Contact us at info@onpointserv.com or bgolasowska@onpointserv.com for details.

Troubleshooting Worklog Posting Issues

If you've successfully downloaded worklogs into the project journal but are unable to post the lines, consider the following:

Posting Group Settings: Verify that the correct posting groups are set up on the resource cards.

Worklog Prices: Ensure individual worklogs in the project journal include prices. Add them to the resource cards if necessary and use the Update Amounts action in the project journal to finalize the lines. While posting lines with zero prices is possible, it may omit critical data for future analyses.

Fixing Errors in Worklogs

If errors are detected in your worklogs, follow these steps:

Error in Project Journal: Delete the line, correct the corresponding worklog in Tempo, and manually download it back into your project journal using the Load Tempo Worklogs action.

After Posting: Reverse the corresponding entry in project ledger entries, post a line with the opposite value in the project journal, then correct it in Tempo and manually download the updated line.

Associated Entries: If project planning lines or sales invoices are affected, delete or credit them, then recreate them based on the corrected worklog.

Analyzing Tempo Data

Effective methods to analyze Tempo data include:

Quick Analysis: Access quick analysis options on the project card under the tasks section to assess project cost, sales price, and invoiced amounts.

Detailed Analysis: Navigate to project ledger entries and switch to analytical mode for detailed analyses, such as project profitability over specific periods. Save these analyses as bookmarks for easy access.

Comparison and Integration: Compare planned project lines with downloaded worklogs in project journals. Integrate your data with BI tools like Power BI for advanced insights.

If you would like to access full product documentation or have any questions, please contact us at **info@onpointserv.com** or **bgolasowska@onpointserv.com**.

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