

Time Tracking, Resource Planning & Project Management

1. Quick Overview

This demo showcases the Time Tracking, Resource Planning & Project Management app for Jira — a single Forge app with four integrated modules that give teams complete visibility into time, capacity, portfolio, and priorities, all without leaving Jira.

- Each module can be demonstrated independently or as a connected end-to-end workflow
- The modules covered are: Capacity Planner, Time Tracking & Reports, Portfolio Management, and Backlog Prioritization.
- Settings and Permissions are also configured and demonstrable.

Instance	https://clovity-demos.atlassian.net/
Projects	Manufacturing Excellence Program (MEP), Supply Chain Optimization (SCO), Enterprise IT Transformation (EIT), Compliance & Risk Management (CRM), New Product Development (NPD)
Team	Operation Team
Team Members	Ash Parker, Shawn Page, Ashton Maka, Christopher Harrison, Victor Parker
App Modules	Capacity Planner · Time Tracking & Reports · Portfolio Management · Backlog Prioritization

What's in This Guide

Section 1 Your Jira Instance at a Glance — projects, users, and key setup

Section 2 Navigating Jira — boards, issues, epics, and backlog

Section 3 Creating & Managing Work — step-by-step from issue to completion

Section 4 Capacity Planner — team plans, workload schemes, and reporting

Section 5 Time Tracking & Reports — logging time, timesheets, reports, and accounts

Section 6 Portfolio & Roadmap — the demo portfolio, Gantt view, and hierarchy

Section 7 Backlog Prioritization — scoring frameworks, priority matrix, and configuration

Section 8 Settings — time units, worklog fields, staff management, and calendars

Section 9 Permissions — roles, access control, permissions overview, and audit log

Section 10 Dashboard — the Portfolio dashboard gadgets built for the instance

Section 1 | Your Jira Instance at a Glance

1.1 The Five Projects

Your AGC instance contains five company-managed software projects, each representing a department or function within the organisation. All five are included in the portfolio and roadmap. Project leads are Shawn Page (Member Services, Finance & Reporting) and Demo User1 (Employer Services, Policy & Compliance, Operations Improvement).

Project Key	Project Name	Focus Area
MEP	1. Manufacturing Excellence Program	Process optimization, quality control, production efficiency
SCO	2. Supply Chain Optimization	Vendor management, logistics streamlining, cost reduction
EIT	3. Enterprise IT Transformation	System modernization, infrastructure upgrade, digital enablement
CRM	4. Compliance & Risk Management	Regulatory adherence, risk assessment, audit readiness
NPD	5. New Product Development	Market research, prototype development, go-to-market strategy

1.2 Team — "Operation Team"

A dedicated team was created inside the Time Tracking & Resource Planning app so that all demo work items are visible and attributable. The team is led by Max Cooper.

Team Member	Workload Scheme
Ash Parker	Default (8h/day)
Shawn Page	Default (8h/day)
Ashton Maka	Part-Time (4h/day)
Christopher Harrison	Part-Time (4h/day)
Victor Parker	Default (8h/day)

1.3 Workload Schemes & Holiday Calendars

Two workload schemes define how many hours per day each team member is considered available. These feed directly into capacity calculations.

Scheme	Daily Hours	Assigned To
Default (8h)	8h Mon–Fri	Ash Parker, Shawn Page, Victor Parker (and all other org users)

Part-Time (4h)	4h Mon–Fri	Ashton Maka, Christopher Harrison
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Three holiday calendars are available: Default Calendar, USA Calendar (assigned to Christopher Harrison and Developers Clovity), and Indian Calendar. To change a staff member's calendar, go to Settings > Manage Staff > Staff Assignments.

Section 2 | Navigating the Instance

2.1 The Jira Sidebar

When you log in, the left sidebar is your main navigation. You will see:

- Your Projects — lists all five projects
- Plans — opens the Portfolio and Roadmap area (the "demo portfolio")
- Dashboards — where the two pre-built dashboards live
- App Switcher (grid icon, top left) — access Time Tracking & Resource Planning and Dashboard Templates apps



Tip

The app module names and app switcher order have been configured for the instance. If you don't see an app in the switcher, click 'More' or check the Apps menu at the top navigation bar.

2.2 Inside a Project — Key Views

Click any project name to open it. Use the left sidebar within the project to switch views:

View	What You'll See
Board	Kanban or Scrum board — drag cards across status columns
Backlog	All issues in a prioritized list; manage sprints here
List	Flat issue list with filters and bulk editing
Timeline	High-level Epic/Story roadmap within a single project
Reports	Built-in Jira charts: burndown, velocity, cumulative flow

2.3 Understanding Issue Types

The instance uses four issue types, organized in a hierarchy from largest to smallest:

Issue Type	What It Represents
Initiative	Highest-level strategic objective (5 exist across all projects)
Epic	A grouping of related work; contains Stories and Tasks (19 total)
Story	A user-facing feature or requirement (17 total)

Task	An individual work item or action (107 total — the most common type)
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Note

Issues are spread across all 5 projects: Member Services, Employer Services, Policy & Compliance, Finance & Reporting, and Operations Improvement.

Section 3 | Creating & Managing Work

3.1 Creating an Issue

You can create an issue from anywhere using the blue + Create button in the top navigation bar.

Step	Field	What to Do
1	Project	Select the project (e.g., 1. Manufacturing Excellence Program)
2	Issue Type	Choose Task, Story, Epic, or Initiative
3	Summary	Write a clear, action-oriented title (e.g., "Upload statements to member portal")
4	Assignee	Assign to a Operation team member for visibility in capacity planning
5	Priority	Set priority: Highest, High, Medium, Low, or Lowest

6	Epic Link	Link to an existing Epic to group related work
7	Due Date	Set a due date — this drives risk flagging in the Capacity Planner
8	Create	Click Create to save the issue

3.2 Updating an Issue

Click any issue key (e.g., MEP-1) to open the issue detail panel. From here you can:

- Change the Status — click the status button and select a transition (e.g., To Do > In Progress > Done)
- Log time — click the "..." menu and select Log Work, or use the Time Tracking panel on the right
- Add a comment — scroll to the activity section and type in the comment box
- Link issues — use the Link button to create dependencies (Finish-to-Start, Blocks, etc.)
- Attach files — drag and drop into the attachment area



Tip

Dependency links you set on issues will appear as arrows on the Gantt Chart in the Portfolio view. A Finish-to-Start dependency means the linked issue cannot start until the predecessor is complete.

3.3 Working with Epics

Epics group related tasks and stories. Each project has 3 Epics. To view all Epics in a project, go to Backlog and look for the Epic panel on the left, or switch to the Timeline view.

- To create an Epic: + Create > Issue Type = Epic > fill in Start Date and Due Date
- To add a Task to an Epic: open the task > set the Epic Link field

- To see Epic progress: the Portfolio Gantt shows each Epic as a bar spanning its start-to-end dates

Section 4 | Capacity Planner

Access the app from the App Switcher > Time Tracking, Resource Planning & Project Management. The left sidebar has five modules: Planner, Analytics, Team Management, Saved Plans, and Reports.

4.1 The "April Plan" — Reading the Planner

A saved Report called April Month Report covers 01 April– 30 April 2026 for the Operation team. To open it: Reports > April Month Report. Color coding on the daily cells tells you utilization at a glance:

Color	Meaning	Threshold
Blue	Normal utilization	Under 80% of daily capacity
Orange	High utilization	80–99% of daily capacity
Red	Overloaded	At or over 100% of daily capacity
Gray (–)	Non-working day	Weekend or holiday



Note

Ashton Maka and Christopher Harrison show 4h cells (not 8h) because they are assigned the Part-Time workload scheme. The planner respects each person's scheme automatically.

4.2 Analytics — Four Views

Open the Analytics tab inside the Capacity Planner for deeper insight into team workload:

Analytics View	What It Shows
Assignee Capacity	Planned hours per person for the period — hover any bar to see breakdown by project (MEP, SCO, EIT, CRM, NPD).
Deadlines Risk	Calculates whether each item can realistically be completed before its due date. Green = on track, red = at risk.
Status Aging	Flags issues sitting too long in one status — useful for spotting blockers across all five projects.
Utilization	Overall team utilization rate across the selected date range.



Note

Deadlines Risk is the most actionable analytics view — it surfaces which issues across MEP, SCO, EIT, CRM, and NPD are at risk of missing their due date given current capacity.

4.3 Adding a Work Item to the Plan

Step	Action
1	Open Planner - Inside Capacity Planner module

2	Find the team or a member row you want to assign work to
3	Click the + icon on their row
4	Search for the Jira issue by key or summary (e.g., MEP-4, EIT-18)
5	Confirm the assignment — the issue's estimated hours will appear distributed across the date range
6	Click Edit (bottom right) then Save to persist changes



Tip

Issues with no time estimate will not appear in the utilization calculation. Set the Original Estimate on an issue (inside the issue detail > Time Tracking field) before adding it to a plan.

4.4 Capacity Reports

Go to Reports to generate a Planned or Planned vs Actual chart across multiple projects. The report shown covers Projects 1, 2, 4, and 5 for April 2026.

- Planned view: shows booked hours per project as a pie or bar chart
- Planned vs Actual: compares what was planned against actual logged time (requires time logs on issues)
- Detailed Report: drill-down table showing project > assignee > issue type > issue with daily hour breakdown
- Export: all reports can be downloaded as CSV



Note

Manufacturing Excellence Program (MEP) accounts for 1,448h (66%) of total planned hours in the April report. New Product Development accounts for 744h (34%). To drill into a segment, click the pie chart slice.

4.6 Team Management

To view or edit the Operation team: Team Management > Operation . From here you can add members, set roles, and see who is on the team. The Team Lead is currently set to Love Carter.

- To add a member: open the team > Add Member > search by name
- To create a new team: Teams > New Team > name it > add members > set lead > Save
- Programs group multiple teams under a shared programme umbrella — capacity, reports, and portfolio views can all be filtered at programme level

Section 5 | Time Tracking & Reports

Time Tracking is the module your team uses every day. It gives each team member a personal view of their logged time and gives managers a fully filterable report across all projects.

5.1 My Calendar

My Calendar is the personal time logging view. Every block on the calendar represents a worklog on a Jira issue.

Step	Action
1	Open Time Tracking > My Calendar
2	Click any empty calendar slot
3	Search for the Jira issue in the dialog (type a partial key such as MEP-1 — autocomplete will appear)
4	Enter hours (e.g. 2h) and a description
5	Click Save — the worklog writes directly to Jira and the block appears immediately on the calendar



Tip

The autocomplete issue search is a strong UX moment — type a partial issue key or summary and the matching issues appear instantly. No need to leave the calendar view.

5.2 Timer

For real-time tracking, use the built-in timer available from the header icon.

- Click the timer icon in the Jira header
- Select an issue (e.g. MEP-4) and click Start
- Pause when you step away — the timer holds the elapsed time
- Click Stop when done — the elapsed time pre-fills the worklog form automatically
- The timer persists even if you close the browser



Tip

The pre-fill moment is the key payoff — when the timer stops, the exact elapsed time appears in the log hours field. Hold on this screen briefly during the demo.

5.3 My Timesheet

Switch from My Calendar to My Timesheet for a weekly grid view. Issues appear as rows, days as columns.

- Click the My Timesheet tab from within Time Tracking
- Edit any cell inline — click the cell, type the hours, and press Enter
- The weekly total row at the bottom updates in real time
- Use this view at the end of the week to review and fill any gaps

5.4 Reports

Reports gives managers a fully filterable view of all logged time across the instance.

Step	Action
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1	Open Reports from the Time Tracking left sidebar
2	Set date range: April 1 – April 30, 2026
3	Select a project filter (e.g., Manufacturing Excellence Program — MEP)
4	Change grouping to By Project > By User
5	Expand a team member's row (e.g., Ash Parker) to see individual worklog detail
6	Click Export CSV to download the full dataset

5.5 Accounts

Accounts classify where time goes beyond the Jira project — useful for billing, CapEx/OpEx split, or client-level reporting.

- Open Accounts from the Time Tracking sidebar
- Accounts are categorised as: Billable, Internal, CapEx, OpEx
- Team members tag their worklog with an account when logging time
- Reports break down time by account automatically
- Click into any account to see total hours logged and the linked Jira issues



Note

Accounts are a key finance use case — they let you answer 'how many billable hours went to Client X this month?' without leaving Jira.

5.6 Native Jira Integration — Three Touchpoints

This app registers as Jira's native Time Tracking Provider, giving three native touchpoints without any behaviour change required from the team:

Touchpoint	What It Does
Log Work button	Click the native Log Work button on any Jira issue — the app's custom dialog opens instead of Jira's default, with full worklog fields and account tagging.
Issue Panel	A panel on the right side of every Jira issue shows the full worklog history for that issue in context — no need to navigate away.
Dashboard Gadget	A personal timesheet widget available on any Jira dashboard — team members can see their logged time without opening the Time Tracking module.



Tip

When demonstrating the Log Work button: open any Jira issue (e.g. CRM-1), click the native Log Work button in the issue header, and pause — the app dialog opens instead of Jira's default. This is the most impactful moment in this section.

Section 6 | Portfolio & Roadmap (Operation Team portfolio)

The portfolio aggregates all five projects into a single cross-project view. Access it from the left sidebar under Saved Portfolio> Operation Team portfolio. A "Roadmap 2026" feature has been created to group all projects under one planning horizon.

6.1 Three Views — Table, Gantt, and Graph

View	How to Use It
Table + Gantt (default)	Left side shows issues in a hierarchy. Right side is the Gantt timeline. Toggle between Day / Week / Month resolution.
Graph / Hierarchy	Shows a mind-map-style breakdown of Projects > Epics > Issues. Useful for understanding structure at a glance.
Export	Click the Export button (top right) to download the portfolio as CSV or image for stakeholder reporting.

6.2 Using the Gantt Chart

The Gantt Chart in the demo portfolio shows all 107 issues across April–May 2026. Each bar represents the duration of an issue from start to due date.

- Zoom: Use Day / Week / Month toggles at the top right of the Gantt
- Scroll: Use the horizontal scroll bar at the bottom to move forward or back in time
- Dependency arrows: Orange lines connecting bars indicate Finish-to-Start dependencies
- Colors: Blue bars = In Progress, gray = To Do, green = Done. Orange bars indicate a dependency conflict.
- To add a dependency: hover over a bar end and drag the arrow to another issue's bar, or open the issue and use the Link option



Try This

Click the Gantt Chart button in the toolbar to toggle the timeline on or off. Use the Hierarchy dropdown to filter by Epic, Story, or Task level.

6.3 Filtering the Portfolio

Use the Filter button (top right of portfolio) to narrow down what you see. You can filter by:

- Assignee — show only issues assigned to a specific team member
- Status — show only In Progress or To Do items
- Label or Epic — focus on a single work stream
- Date range — scope the view to April or May 2026

6.4 Portfolio Views — Additional Lenses

Beyond Table and Gantt, the portfolio offers four more views accessible from the view selector:

View	What It Shows
Graph	Issue relationships as a network — useful for understanding the full dependency chain across all five projects.
Treemap	Proportional view — larger rectangles mean more story points. Colour indicates status.
Pie Chart	Distribution by any dimension. Switch between status, assignee, or project instantly.
Board	Kanban view of all portfolio issues. Drag a card to transition its Jira status — updates immediately.



Tip

Switch grouping to By Assignee in Gantt view to see every team member's committed timeline side by side — Ash Parker, Shawn Page, Ashton Maka, Christopher Harrison, and Victor Parker.

Section 7 | Backlog Prioritization

Backlog Prioritization gives teams an objective, data-driven answer to what work should come first. Every issue in your Jira backlog is scored automatically using a configurable framework.

7.1 Scoring Frameworks

Five frameworks are available out of the box. Switch between them at any time — the entire backlog rescores in real time:

Framework	What It Scores
RICE	Reach × Impact × Confidence ÷ Effort — a weighted composite score balancing value and cost.
ICE	Impact × Confidence × Ease — a simpler three-factor score suited to fast-moving teams.
WSJF	Weighted Shortest Job First — scores by Cost of Delay ÷ Job Duration. Common in SAFe environments.
Value vs Effort	Plots issues on a simple 2-axis value-versus-effort scale.
Quick Wins	Identifies items with high value and low effort — the fastest wins available in the backlog.

7.2 The Backlog Table

The Backlog Table shows all issues from the five projects (MEP, SCO, EIT, CRM, NPD) with their current score.

- Open Backlog Prioritization — the issue list loads with a Score column visible
- Sort by score descending to see the top-ranked issues at the top
- Open the template selector dropdown and choose a scoring framework
- Switch from RICE to WSJF — watch all scores recalculate live across all 107 issues
- Click any issue (e.g. OI-3) to open a side panel showing the full score breakdown — every component, weight, and value
- The mini history chart in the panel shows how that issue's priority has changed over time



Note

The live rescore is the visual hook — when you switch frameworks, every score in the table updates at once. Make this clearly visible during the demo.

7.3 Priority Matrix

The Priority Matrix tab plots every scored issue on a 2x2 Value vs Effort quadrant.

Quadrant	What It Means
Quick Wins (top-left)	High value, low effort — do these first.
Big Bets (top-right)	High value, high effort — plan carefully and resource properly.

Fill Ins (bottom-left)	Low value, low effort — schedule when capacity allows.
Low Priority (bottom-right)	Low value, high effort — consider deferring or dropping.

- Hover any bubble to see the issue key and title in a tooltip (e.g. EIT-5)
- Click any bubble to open the Jira issue in a side panel
- Drag the axis threshold line to shift quadrant boundaries — some bubbles will reassign quadrants as you drag

7.4 Configuration

Configuration lets you customize any scoring framework or build a new one from scratch.

- Open Configuration tab — the template list shows all available frameworks
- Click Edit on any template (e.g. RICE) to see the formula tokens: Reach, Impact, Confidence, Effort
- Click any token to open its field mapping — change it to any standard or custom Jira field
- Adjust the weight slider to change how much each token contributes to the total score
- Click New Template to open the blank builder — name it, add tokens, map each to a Jira field, and Save
- Switch to the new template in the Backlog Table — all issues rescore against the new framework immediately



Tip

The rescore after switching to a custom template is the payoff moment — it shows how quickly the entire backlog re-ranks against your own criteria.

Section 8 | Settings

Settings is where admins configure the app to match how their organisation actually works. Access it from the App Switcher > Time Tracking > Settings. There are seven configuration sections.

8.1 Time & Units

Sets the baseline working time used in all capacity calculations.

Setting	Value in This Instance
Working hours per day	8h (Default scheme) / 4h (Part-Time scheme — Ashton Maka, Christopher Harrison)
Working days per week	Monday – Friday (5 days)

8.2 Booking & Fields

Controls governance rules for time logging across the instance.

- Minimum log increment — the smallest unit of time a team member can log (e.g. 15 minutes)
- Required fields toggle — forces team members to complete specific fields on every worklog before saving

- Future time logging toggle — controls whether team members can log time against future dates

8.3 Timezone & Defaults

Sets the organisation's default timezone and worklog display preferences.

- Timezone selector — all time logs and capacity calculations align to the selected timezone
- Default worklog visibility — sets whether new worklogs are visible to all users or restricted

8.4 Time Categories

Time Categories let team members tag their worklogs with a category — enabling breakdown reporting by work type.

Category	Typical Use
Development	Engineering and coding work logged against MEP, SCO, EIT, CRM, or NPD issues
Meetings	Sprint planning, standups, retrospectives, and stakeholder calls
Client Work	External-facing work billable to a specific client or account
Internal Admin	Non-billable internal tasks: documentation, onboarding, admin

- To add a category: Settings > Time Categories > New Category > name it > pick a colour badge > Save

- Categories flow through into Reports and CSV exports — filter by category to see how time is split across work types

8.5 Worklog Fields

Worklog Fields add custom metadata to every worklog form — beyond the default hours and description.

- Available field types: Text, Dropdown, Date
- Example use cases: billing reference code, activity type, client code, cost centre
- To add a field: Settings > Worklog Fields > Add Field > choose type > name it > Save
- All custom worklog fields appear in Reports and CSV exports alongside standard fields

8.6 Manage Staff

Manage Staff sets each person's contracted hours and holiday calendar — the inputs that drive accurate per-person capacity in the Planner.

Team Member	Hours/Day	Holiday Calendar	Workload Scheme
Ash Parker	8h	USA Calendar	Default
Shawn Page	8h	Default Calendar	Default
Ashton Maka	4h	Indian Calendar	Part-Time
Christopher Harrison	4h	USA Calendar	Part-Time

Victor Parker	8h	Default Calendar	Default
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- To change a staff member's calendar: Settings > Manage Staff > Staff Assignments > select the user > change calendar from dropdown
- To change hours/day: Settings > Manage Staff > select the user > edit Hours Per Day > Save

8.7 My Permissions

My Permissions lets every user see their own role and exactly what they are permitted to do in the app — no surprises, transparent access control.

- Open Settings > My Permissions to see the current user's assigned role
- The permission list shows every action the current role allows — view, log, manage, report, configure
- Users cannot change their own permissions — only an Admin can change roles

Section 9 | Permissions

The Permissions module is the built-in role-based access control system — covering every module in the app. Access it from the App Switcher > Time Tracking > Permissions.

9.1 User Roles

Three roles ship out of the box. Jira admins are detected automatically and assigned Admin role — zero manual setup required.

Role	Who It's For	Level of Access
Admin	Jira admins (auto-detected)	Full access to all modules, settings, and permissions

Member	Standard team members — Ash Parker, Shawn Page, Ashton Maka, Christopher Harrison, Victor Parker	Log time, view reports, access planner and portfolio
Viewer	Stakeholders and read-only users	View reports, dashboards, and portfolio only — no logging or editing

- To change a user's role: Permissions > User Roles > click the user row > select new role from dropdown > Save
- Role changes take effect immediately — no page refresh required

9.2 Role Management

Role Management shows exactly what each role permits — the complete permission list per role.

- Open Permissions > Role Management
- Click any role (e.g. Member) to expand and see all six permissions assigned
- Permissions cover: time logging, report access, planner access, portfolio access, settings access, and permissions management



Note

Role Management is a transparency feature — any stakeholder can see exactly what each role is allowed to do, without needing to raise an IT ticket.

9.3 Permissions Overview

Permissions Overview shows the complete access matrix in one screen — every permission as a row, every role as a column, with check marks and dashes in each cell.

- Open Permissions > Permissions Overview
- The matrix shows all permissions vs all roles at a glance

- Take a screenshot of this matrix for compliance documentation — it captures the full access model in one view



Tip

During the demo, freeze on the Permissions Overview matrix for a few seconds — viewers need time to read it. This screen is often requested as a screenshot for enterprise compliance reviews.

9.4 Audit Log

Audit Log records every role change automatically — providing an evidence trail for regulated industries.

Column	What It Records
Timestamp	Date and time of the role change
Actor	The user who made the change
Action	The type of change (e.g., Role Assigned, Role Removed)
From Role	The previous role before the change
To Role	The new role assigned

- To filter the log: Audit Log > Action filter > select "Role Assigned" > apply — shows only assignment events with timestamps
- Up to 1,000 entries are retained

- For regulated industries (finance, healthcare, government), this is the evidence trail every enterprise audit requires

Section 10 | Dashboard

Two dashboards have been pre-built for the instance. Access them from the top navigation bar > Dashboards. Both are designed to give a portfolio-level and capacity-level view of the instance.

10.1 Dashboard Layout

The main dashboard contains gadgets that give an at-a-glance view across all five projects:

Gadget	Source App	What It Shows
Portfolio Gadget (top, full width)	Project Portfolio Management	The demo portfolio in Gantt or Table view, embedded directly in the dashboard. 107 issues across all projects.
Time Tracking Gadget	Time Tracking & Reports	Personal timesheet widget — team members can see their logged time without opening the Time Tracking module.