

Time Tracking, Resource Planning & Project Management



1. Overview

Time Tracking, Resource Planning & Project Management is a Jira Cloud Forge app that helps project teams:

- Plan team capacity with real-time utilization and deadline risk analytics.
- Track time using timesheets, calendar views.
- Manage cross-project portfolios with Gantt charts and roadmaps.
- Prioritize backlogs with built-in RICE, ICE, and WSJF scoring frameworks.

2. Getting Started



2.1 Prerequisites

Complete the following before using the app:

- **Jira Permissions**
 - Rights to view and edit issues in projects you want to plan or track.
 - To manage app-level permissions, the user must have Jira Admin access.
 - For Time-Tracking: permission to log work on issues.
 - For Backlog Prioritization: permission to edit custom fields.
- **App Installation**
 - Verify the app is installed and enabled by your Jira administrator.
 - The app appears as a Global Page accessible from the Jira top navigation bar

- **Quality of Inputs**
 - Ensure issues have assignees, estimates, start and due dates for best analytics results.
 - Select and configure all the fields from settings (Time & Units, Booking & Fields, Timezone & defaults, Manage Staff).



2.2 Launching the App

1. Click the app name in the Jira top navigation bar to open it.
2. Use the module tabs at the top to switch between the four modules.
3. Select a section from the left sidebar within the active module.
4. Start working.



2.3 Module Switcher

The top navigation bar contains tabs to switch between the four modules. Each module has its own left sidebar with sections for main features, saved items, team management, permissions, and settings.

- **Capacity Planner** - Plan workload, manage leaves and holidays, track team performance.
- **Time Tracking** - Log hours via calendar, manage timesheets, run approval workflows, export reports.
- **Portfolio Management** - Build cross-project table views, roadmaps, and Gantt charts.
- **Backlog Prioritization** - Score and rank issues using data-driven frameworks.

3. Module Guide



3.1 Capacity Planner & Insights

This module helps engineering and delivery leads plan team capacity, manage leaves and holidays, and identify workload risks before they become blockers.

A) Creating a Capacity Plan

Purpose: Build a capacity plan for your team by sprint, month, or quarter - accounting for leaves, holidays, and individual workload schemes.

1. Open Planner from the sidebar.
2. Select Jira groups / Teams / Individuals and date range.
3. Review the Planning Calendar - leaves and holidays are pre-applied.
4. Assign work to team members, then Save the plan.

Output

A saved capacity plan showing each member's assigned hours vs. available capacity. Overloaded members are highlighted in red. Part-time and full-time members are shown with their respective daily hour limits.

B) Vacation & Leave Planning

Purpose: Record individual team member leaves so that the Planning Calendar and all capacity calculations reflect real availability.

- Open Vacation Planning from the sidebar
- Select a team member.
- Add leave entry: choose type (Vacation, Sick, Other), start date, & end date.
- Save. The Planning Calendar updates immediately.

Output

Leave days are blocked out on the Planning Calendar and subtracted from available capacity totals. Leave type is color-coded: Vacation (blue), Sick (orange).

C) Capacity Analytics

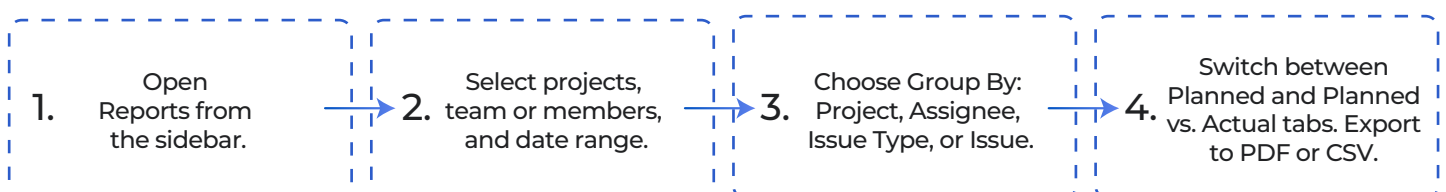
Purpose: Analyze team workload across four dedicated analytics tabs. Select a project at the top, then switch between tabs.

Tab	What It Shows
Capacity Overview	Available vs. allocated hours for each team member. Overloaded members flagged.
Utilization	Utilization percentage per person and per project. Identifies under- and over-utilized resources.
Trend Analysis	Capacity and workload trends over weeks or months.
Project Distribution	How team hours are split across projects.

Each tab has a Table / Charts toggle. Tables support search, sort, pagination, and CSV export.

D) Reports — Planned & Planned vs. Actual

Purpose: Generate team capacity reports by project, period, and grouping. Compare planned hours against actual time logged.

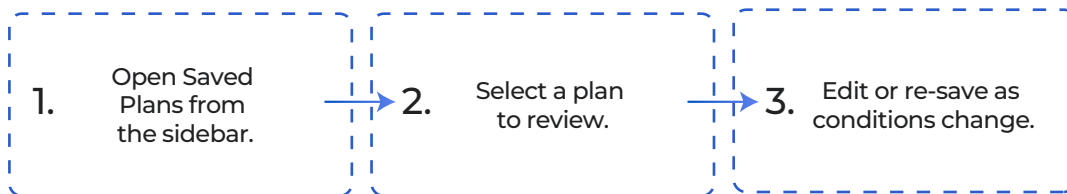


Output

Planned: Hours assigned per member, issue, or project for the selected period. Planned vs. Actual: Side-by-side comparison with a delta column showing variance. Exportable to PDF or CSV.

E) Saved Plans & Reports

Purpose: Access previously saved capacity plans and generate PDF reports for sharing with stakeholders.

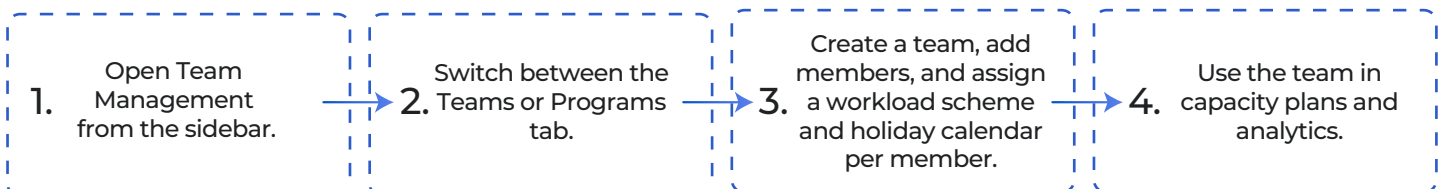


Output

A list of all saved capacity plans with team, date range, and workload snapshot. PDF reports can be exported.

F) Team Management

Purpose: Create and manage teams and programs that feed into capacity plans, analytics, and reports.



Output

Teams and programs visible across all modules. Used for grouping in capacity plans, portfolio views, and reports.

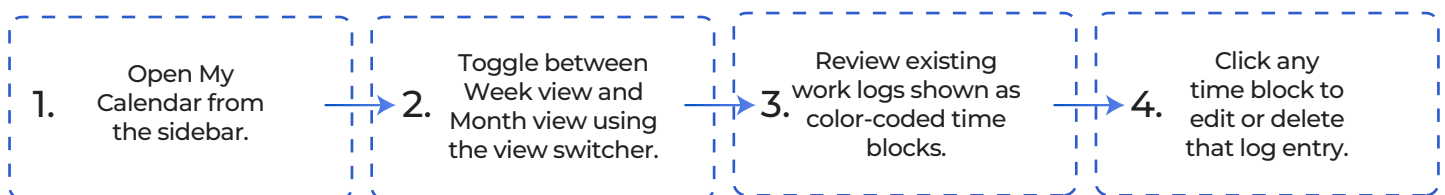


3.2 Time-Tracking & Reporting

This module replaces external timesheets with Jira-native time logging, a visual calendar, a structured approval workflow, and manager-ready reports.

A) My Calendar

Purpose: View your logged time on a visual calendar. Switch between week and month views. Drag assigned issues directly onto the calendar to log work.

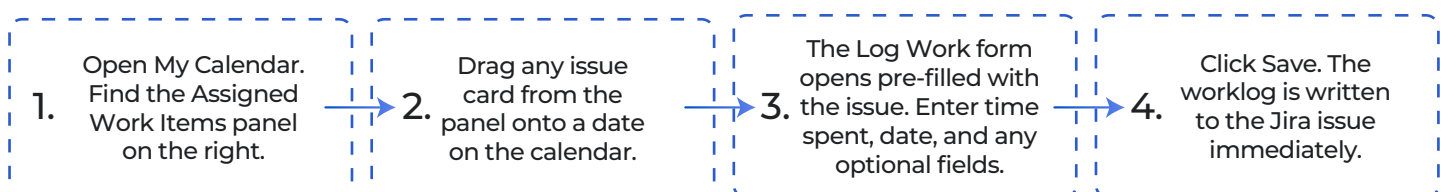


Output

A personal calendar showing daily worklog blocks, color-coded by project or account. Week view shows hour totals per day. Month view shows a daily summary for the full month.

B) Log Time - Assigned Work Items

Purpose: Log work against Jira issues assigned to you without leaving the calendar. The Assigned Work Items panel on the right lists all issues currently assigned to you.

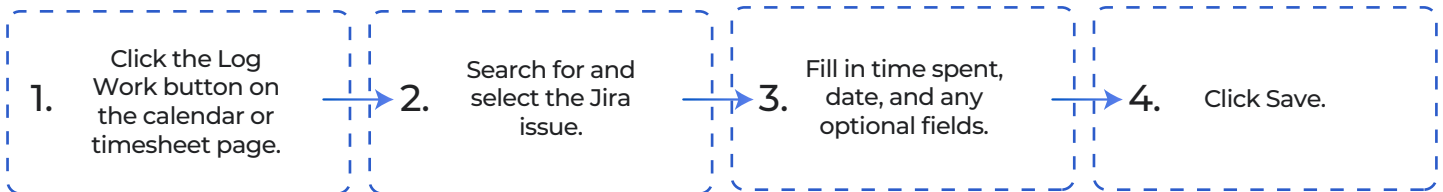


Output

Worklog saved to the Jira issue. Appears immediately as a time block on the calendar and in the timesheet table and reports.

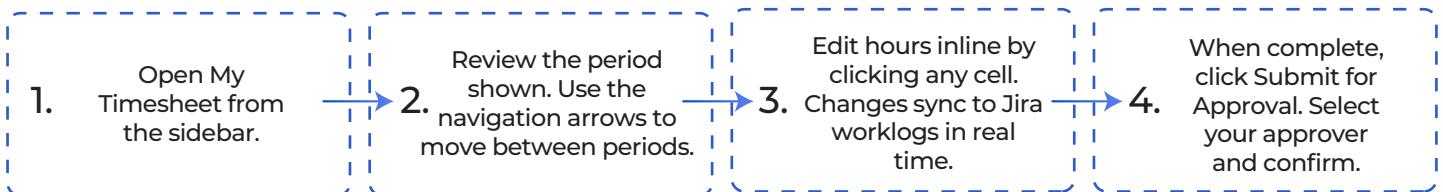
C) Log Time - Manual (Log Work Button)

Purpose: Log work directly without using the drag-and-drop method - useful when logging to a specific issue not in the Assigned Work Items panel.



D) My Timesheet

Purpose: View, edit, and submit your time logs for a configured period (Weekly, Biweekly, or Monthly). The timesheet shows all logged hours in a grid - issues as rows, days as columns.

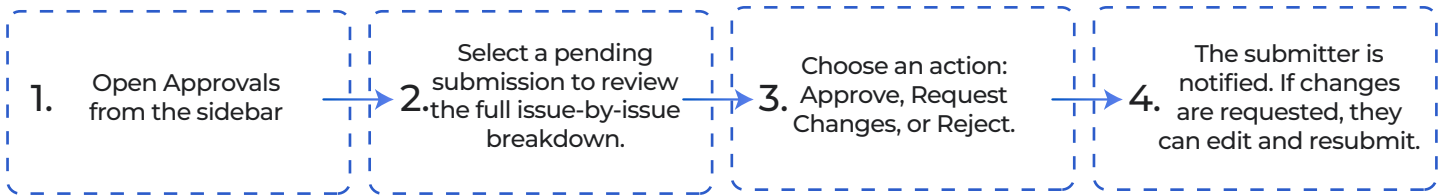


Output

Timesheet submitted to the selected approver. Status changes to Pending Approval. The approver receives a Jira notification. A progress bar shows logged hours vs. the target for the period.

E) Approvals

Purpose: Managers review and approve (or request changes to) submitted timesheets. Available to users with Manager or Admin role.

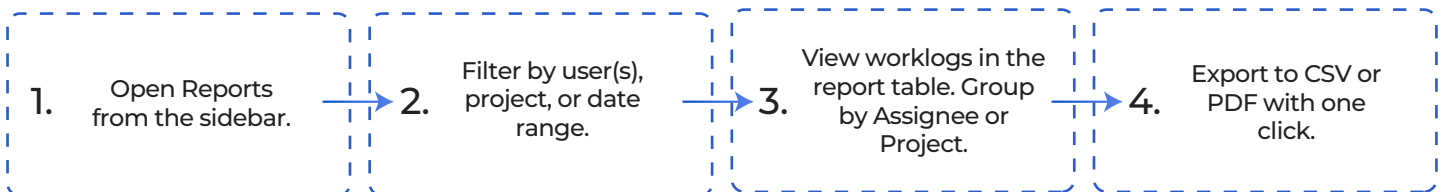


Output

Approved timesheets are locked with a timestamp and approver record, creating a full audit trail. Status changes to Approved or Changes Requested.

F) Timesheet & Reports (Team View)

Purpose: View, filter, and export worklog data across the full team. Available to users with Manager or Admin role.

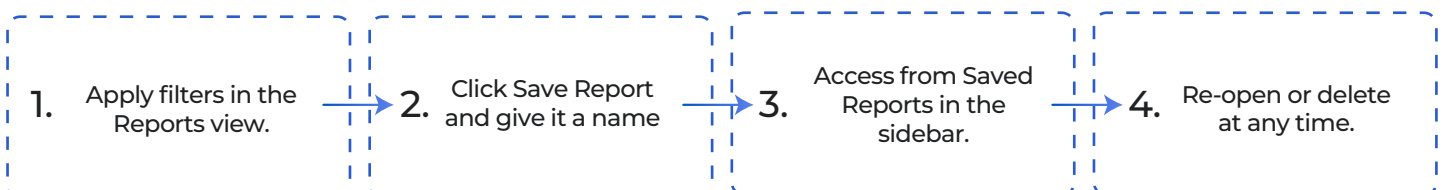


Output

A filterable timesheet table showing user, issue, hours logged, and date. Supports multi-user selection and CSV/PDF export. Column totals show hours per person vs. target for the period.

G) Saved Reports

Purpose: Save a configured report view for recurring use - useful for weekly or monthly reporting cycles.



Output

A reusable report with pre-set filters. Managers can review weekly or monthly without reconfiguring each time.

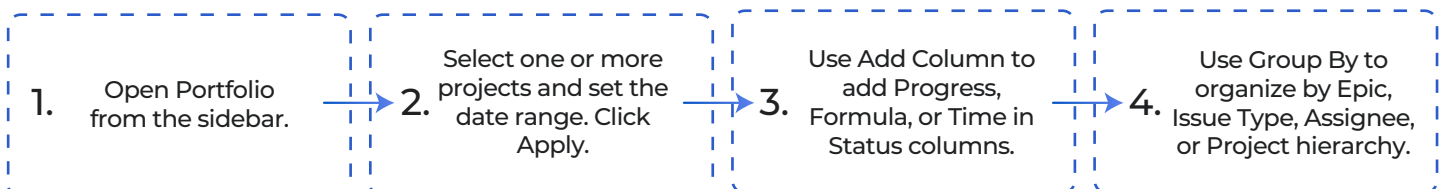


3.3 Portfolio Management

This module gives PMO and portfolio managers cross-project visibility with table views, Gantt charts, roadmaps, and saved portfolio views. All data is live from Jira - no manual entry required.

A) Building a Portfolio View - Table

Purpose: Create a unified, filterable table of issues across multiple Jira projects.



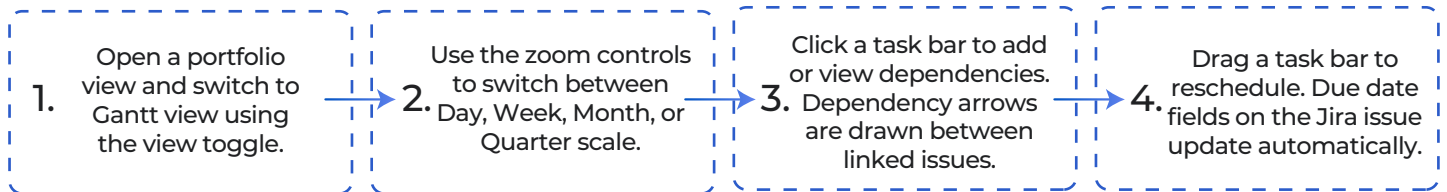
Output

A live cross-project issue table with collapsible hierarchy. Supports inline editing of assignee, status, and priority. Additional column types:

- **Progress** - sub-task completion percentage for each issue.
- **Formula Column**- custom calculated field (e.g., burn rate, estimated completion).
- **Time in Status** - how long each issue has been in its current status.
Useful for spotting bottlenecks.

B) Gantt Charts

Purpose: View issues on a timeline and manage dependencies between tasks across projects.

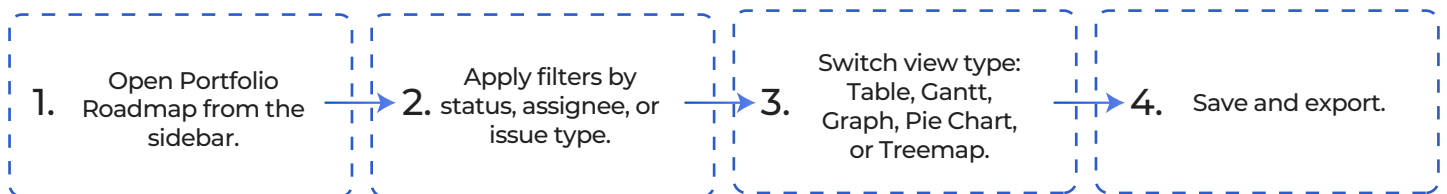


Output

Gantt chart with horizontal bars, dependency arrows, and assignee names. Zoom and scroll controls for navigation. Blocked dependencies are visually highlighted when a predecessor is late.

C) Portfolio Roadmap

Purpose: Create a timeline roadmap view across multiple projects with additional visualization options.

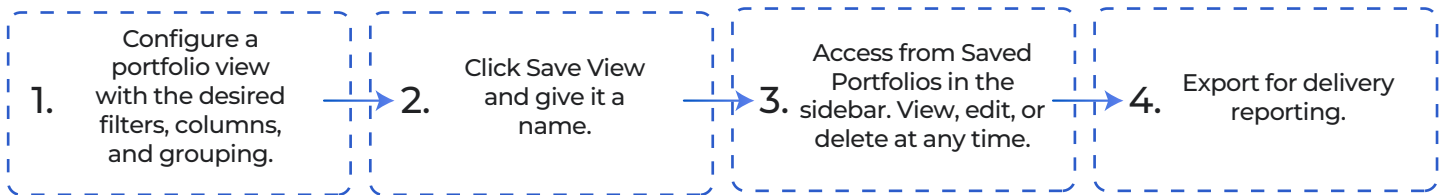


Output

A timeline roadmap with issues in table rows and Gantt bars, plus additional view types - Graph, Pie Chart, and Treemap - for different reporting needs.

D) Saved Portfolios

Purpose: Save and manage a library of cross-project portfolio views for recurring use.



Output

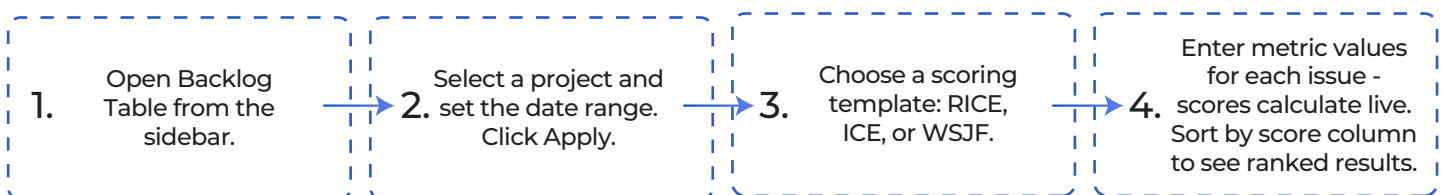
A library of named portfolio views. Each stakeholder can maintain their own saved view - e.g., the PMO has a full portfolio view; leadership has an at-risk-only view.

3.4 Backlog Prioritization

This module helps product managers and owners score and rank backlogs using proven prioritization frameworks. Scores are entered inline and calculate live - no external spreadsheets needed.

A) Scoring Your Backlog

Purpose: Apply RICE, ICE, or WSJF scoring to rank issues by priority.

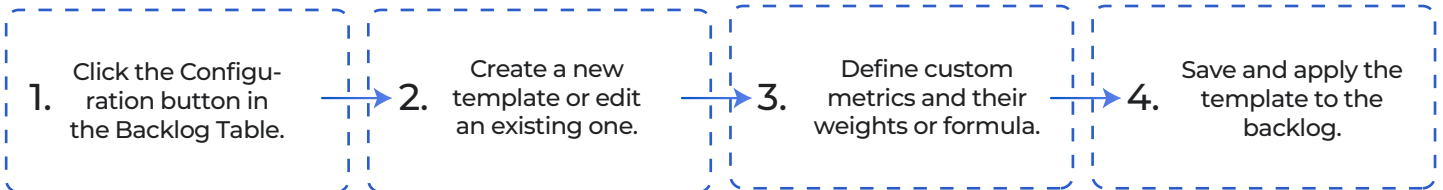


Output

Issues ranked by score. Sort the score column descending to see highest-priority items at the top. Unsourced items remain at the bottom until values are entered.

B) Custom Scoring Templates

Purpose: Create weighted scoring models tailored to your team's specific criteria when standard frameworks don't fit.

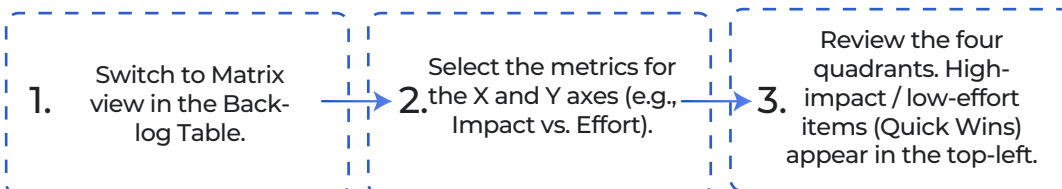


Output

A custom scoring model with your own metrics and formulas. Scores across all issues update automatically when the template is changed.

C) Priority Matrix

Purpose: Visualize issues on a scatter plot for quick trade-off decisions. Useful in sprint planning meetings to reach team consensus on priorities.



Output

A scatter plot with issues plotted by two chosen metrics. Hover over any point to see the issue key, summary, score, and assignee. The table below the matrix updates in sync with any filters applied on the chart.

4. Access and Permissions



4.1 Access

- The app is accessible as a Jira Global Page from the top navigation bar.
- All four modules share the same top navigation with module-specific left sidebar sections.
- The Permissions page is available inside each module's sidebar and is visible to Admins only.



4.2 Permissions & RBAC

The app uses a four-level role-based access control (RBAC) system. Roles are assigned once and apply across all four modules.

Role And Access Level

Admin : Full access to all features, settings, permissions, team management, and audit logs. Can assign roles to other users.

Manager : Full access to all features, settings, permissions, team management, and audit logs. Can assign roles to other users.

Member : Log own time, view own calendar and timesheet, submit timesheet for approval, edit assigned issue metrics in Backlog.

Viewer : Read-only access to dashboards, reports, and portfolio views. Cannot log time or edit any data.



4.3 Settings

Accessible from the Settings section in each module's sidebar.
Settings are global and apply across all modules.

Time & Units

- Time display format: Jira default (e.g., 1d 3h 30m), hours/minutes, hours decimal, days decimal, weeks decimal, or months decimal.

Booking & Fields

- Enable/disable Rough Planning mode (toggle between Rough Planning and Sync-Jira).
- Booking start date field - maps a Jira date field for booking start.
- Booking end date field - maps a Jira date field for booking end.
- Bookings time value field - Original Estimate or Remaining Estimate.
- **Worklog Fields** - Create custom fields that appear in the Log Work form. Fields can be marked as required. Required fields are only enforced when an account is selected in the form.

Timezone & Defaults

- Timezone mode: Jira timezone, User's timezone, or My timezone (with custom timezone selector).
- Default time range: Current month, quarter, year, week, day, or last 7 days.

Holiday Calendars (under Manage Staff)

- Create and manage multiple named holiday calendars (e.g., USA Holidays, UK Holidays).
- Add or remove non-working days (date + name) per calendar.

- Set the active calendar used for capacity calculations.
- Holiday calendars are assigned to individual team members in Staff Assignments.

Workload Schemes (under Manage Staff)

- Create and manage workload schemes with per-day working hours (Mon–Sun). Example: Default 8h/day, Part Time 4h/day.
- Edit or delete existing schemes.
- Workload schemes are assigned to individual team members in Staff Assignments.

Staff Assignments (under Manage Staff)

- Assign a holiday calendar and workload scheme to each Jira user.
- Filter staff by calendar or scheme to review assignments at a glance.
- Assignments apply immediately to all capacity calculations, planning calendars, and analytics.

Timesheet Period Configuration (under Settings)

- Set the timesheet submission period: Weekly, Biweekly, or Monthly.
- Configure the target working hours per period used to calculate timesheet progress.
- Approval routing: define who receives timesheet submissions for each team member.

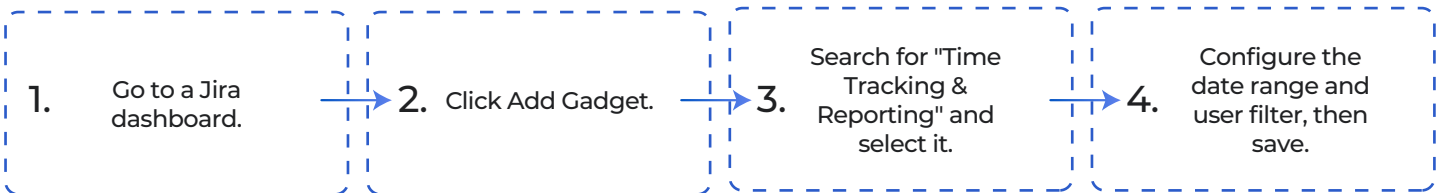
My Permissions

- View the current user's assigned role and permissions within the suite.
- Available in the sidebar of each module - accessible to all users.



4.4 Dashboard Gadget

Purpose: Add a timesheet summary widget to any Jira dashboard so team members can see their time at a glance without opening the full app.



Output

A dashboard widget showing a worklog summary - total hours logged, issues worked on, and hours vs. target for the period. Team members see their time at a glance without opening the app.

5. Tips & Best Practices



5.1 Capacity Planning

- Start with one team. Expand to more teams once the workflow is established.
- Enter all leaves and sick days in Vacation Planning before opening the Planning Calendar for a period - this ensures capacity totals are accurate from the start.
- Review the Utilization tab weekly to catch overloads before they affect delivery.
- Check the Deadlines & Risk tab in Analytics before due dates to spot issues at risk of missing their deadline.
- Use the Part Time workload scheme for contractors or employees with reduced hours - this keeps capacity numbers accurate without any manual adjustment.



5.2 Time Tracking

- Encourage daily logging using the Calendar drag-and-drop - it is significantly faster than the manual form for most users.
- Use the Month view at the end of a period to identify days with no logs before submitting a timesheet.
- Export team reports weekly for finance or billing teams rather than giving them full app access.
- If worklog custom fields are configured, they only apply when an account is selected. Team members without account assignments can log time freely without filling in additional fields.
- Timesheet submissions create an immutable audit record - ensure team members submit at the end of each period, not at the start of the next.



5.3 Portfolio Management

- Keep portfolio views focused: 3-5 projects per view produces the most readable output. Use Saved Portfolios to maintain separate views for different audiences.
- Use the Gantt view for dependency planning and risk identification. Use the Roadmap view for executive status updates.
- Add a Time in Status column to any portfolio table to surface issues that have been stuck in the same status for too long - this is often the earliest indicator of a blocker.
- Use Formula columns to build custom KPIs - for example, a burn rate column or an estimated completion date based on velocity.
- Export saved portfolios for leadership instead of granting full app access. This gives them the view they need without requiring a Jira login.



5.4 Backlog Prioritization

- Start with ICE for teams new to scoring - it is the simplest framework (three inputs) and produces results immediately.
- Use RICE for mature product backlogs where reach (number of users impacted) is a meaningful signal.
- Use WSJF for SAFe or program-level teams where cost of delay is the primary decision driver.
- Create custom scoring templates when your team's criteria do not fit standard frameworks - for example, adding a "Customer Commitment" weighting for contracted deliverables.
- Use the Priority Matrix in sprint planning meetings. Displaying the scatter plot on a shared screen helps the team reach consensus on priorities faster than list-based discussion.
- Score asynchronously before planning meetings - have team members enter scores individually, then review the ranked list together rather than scoring item-by-item in the meeting.