Administration guide

Start with the tab you need to configure. Each topic gives the route, the fields, an example and a check. Where an Organization form offers Apply to draft, apply the change, then choose Save configuration.

Find a topic

People and calendars People and schedules · Teams · Departments · Calendar and leave

Time entry Project IDs · Activity groups · Jira fields

Administration Access · Emails · History

First setup To set up one person, create the department and team, complete the profile and enter weekly hours. To log general project time, also configure the Project ID and destination issue.

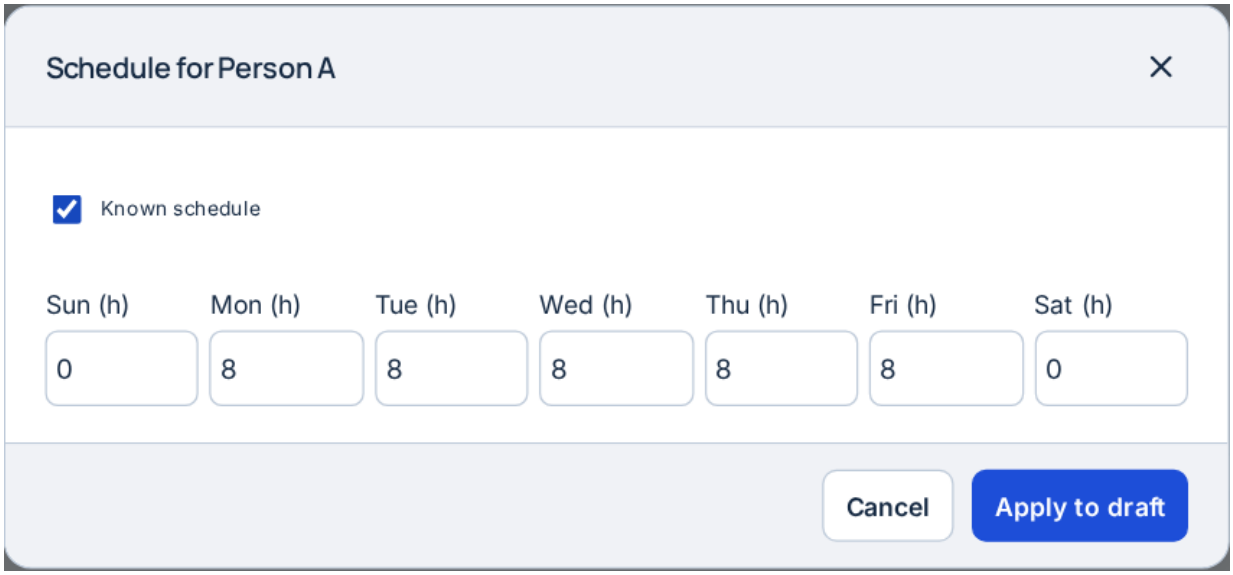
People and schedules

Organization → People and calendars → People and schedules

Use a profile to record where someone works and how many hours they usually work each day of the week. Reports use the profile to group logged time and the schedule to calculate capacity.

1. Sign in as an organization manager or Jira administrator. Enter the name in Filter people. If you see Profile pending, select Set up profile.
2. Choose the department first and then the team. Enter the employee number if your organization uses one.
3. Open Configure schedule or Edit schedule, select Known schedule and check all seven days, including Saturday and Sunday.
4. Select Apply to draft in the schedule window. On the Organization page, select Save configuration and wait for confirmation.

Example Inês works in the Testing team in Engineering. She works 8 h Monday to Thursday and 4 h on Friday. Enter 0 h on Saturday and Sunday. Her weekly reference is 36 h before holidays or leave.



Application screen with fictional data. Open the screen in the guide

Find a person

Field or action	How to use it
Filter people	Search by the name shown in Jira or by the employee number saved in the profile. Clear the search to return to the list.
Refresh Jira directory	Reload the active personal accounts Jira lets you see. You can still edit available profiles if the directory is incomplete.
Search Jira	Appears when the directory is unavailable or you enter an address containing @. Enter at least two characters. If Jira denies access, ask your administrator to check Browse users and groups.

Person profile

Field or action	How to use it
Person	Identifies the Jira account by its display name. A row marked Profile pending has no ScopeTime profile yet. Select Set up profile to prepare it.
Employee number (optional)	Enter the internal identifier as it appears in the leave plan, including leading zeros. Each number belongs to one profile. You can leave it blank.
Department	Choose the person's organizational unit, such as Engineering. Changing the department clears the selected team so you can choose one from the new department.
Team	Choose a team from the selected department. Create a missing team under Teams. You may leave the team unconfigured and complete the profile later.

Weekly hours

Field or action	How to use it
Schedule	Configure schedule opens the week for someone who has no schedule yet. Edit schedule lets you review existing values.
Known schedule	Select this when you know the normal working week. The form starts with 8 h Monday to Friday and 0 h at weekends. Review the values. With the box cleared, logged hours remain visible and capacity is unknown.
Sun (h), Mon (h), Tue (h), Wed (h), Thu (h), Fri (h), Sat (h)	Enter 0 to 24 hours for each day. Use 0 on rest days and 7.5 for seven and a half hours. If the person works a Saturday shift, enter its hours too.

Profile status

Field or action	How to use it
Status	Deactivate takes the person out of the active population used for capacity. Reactivate includes them again. Manage app permissions under Access.
Remove from organization	Removes the person from the regular list. Their Jira account, authorship, worklogs, associations and calendar are preserved.
Show deleted entries	Include removed profiles in the list. To recover one, select Restore, correct any highlighted fields and save the configuration.

How to check Reopen the profile to check the team and all seven values. In Analysis → Reports → Capacity, filter by person and choose a week without holidays or leave to check the total.

Teams

Organization → People and calendars → Teams

Create groups of people within each department. Teams are used in filters and hour breakdowns. To view an existing team's timesheet, open Analysis → Team timesheet.

1. As an organization manager or Jira administrator, check that the department exists. Create it under Departments if needed.
2. Under Teams, enter a Name, choose the New team's department and select Add. The team appears in the draft table.
3. The Jira administrator can select a lead in the team row. Under People and schedules, assign the department and team in each member's profile.
4. Select Save configuration. To move a team to another department, change its department in the table and review the members' profiles before saving.

Example Engineering has two teams, Testing and Development. To place someone in Testing, open their profile under People and schedules and choose Engineering and Testing.

Fields and options

Field or action	How to use it
Name	Required when creating a team. Use a name distinct from the other teams, up to 100 characters. To rename a team, edit the text in its row.
New team's department	Required. Choose an existing active department. If the list is empty, add a department first.
Department	In an existing team's row, choose the department it belongs to. Moving the team also updates the department on its members' profiles.
Team lead	Only a Jira administrator can change this field. Choose someone with an active profile to view this team's timesheet or leave No team lead selected.
Availability	Shows the team’s status. Archive preserves existing references. To make the team available again, show archived teams, select Reactivate and save.
Show archived	Include teams archived from the regular list. This filter is independent of Show deleted entries.
Show deleted entries	Find a deleted team. Restore returns it to the archived state. Also select Show archived to find it and Reactivate to use it again.
Delete	Asks for confirmation. If links or records prevent deletion, choose Keep archived when the app offers it.

How to check Confirm the team appears in the team selector of someone in that department. After saving, the lead can review time in Analysis → Team timesheet.

Departments

Organization → People and calendars → Departments

Create the organizational units that group teams and people. Use Organization to maintain the catalogue. To see how hours are distributed across projects, open Analysis → Reports and select View on the Hours by department and team card.

1. As an organization manager or Jira administrator, open Departments and check whether the unit already exists. Include archived entries if needed.
2. Enter a Name and select Add. The department appears in the draft table. To correct the text, edit the name in that row.

3. Select Save configuration. Under Teams, choose this department when creating a team. Under People and schedules, assign each person to the relevant department and team.

Example Create Engineering once and assign Testing and Development to it under Teams. When viewing Engineering, you can open teams with logged time in the chosen period.

Fields and options

Field or action	How to use it
Name	Required, up to 100 characters. Use the name people recognize in filters, such as Engineering. Each department needs a distinct name.
Availability	Shows whether the entry is available, archived or deleted. Choose Archive to retire it while preserving its references.
Show archived	Include archived departments. Choose Reactivate in the relevant row and save to use that department again.
Show deleted entries	Include deleted entries. Restore brings the department back as archived. Select Show archived to see it and choose Reactivate if needed.
Delete	Use for an entry created in error. The app may block deletion if teams, people or other records depend on it. Keep the department archived in that case.

How to check When creating a team, check that the new department appears in the selector. To check logged hours, open Analysis → Reports, choose a period with worklogs and select View on the Hours by department and team card.

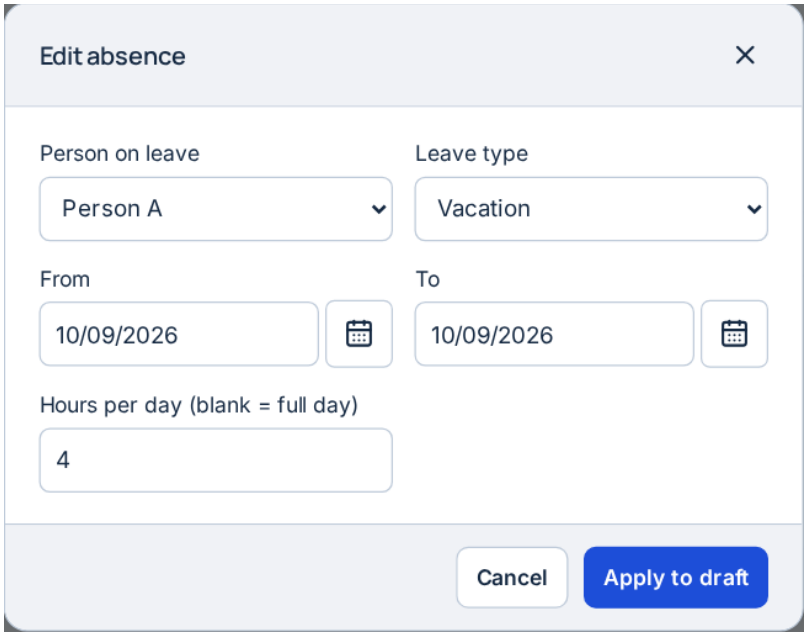
Calendar and leave

Organization → People and calendars → Calendar and leave

Set the time zone, shared public holidays and each person's leave. ScopeTime starts from weekly schedules to calculate the hours available on a given day. Vacation and sick leave have their own categories, separate from time worked on projects.

1. As an organization manager or Jira administrator, start with Report time zone. To check expected hours, also review the weekly schedule under People and schedules.
2. For a local holiday, select Add holiday, enter a date and name and choose who it applies to. For national holidays, open Import national public holidays, select a country and year and use Preview holidays before applying the list.
3. To enter vacation, sick leave or another absence for someone, select Add leave. Choose the person and dates. People can also manage their own periods under My Timesheet → Holidays and absences.
4. If you have an annual Excel leave plan, choose Import Excel, select the .xlsx file and review the mapping between employees and Jira accounts. Open View changes and check for conflicts before applying.
5. Select Apply to draft in the form or Apply holidays to draft for national holidays. Back on the Organization page, select Save configuration to make the change available.

Example Someone is scheduled for 8 h on a Tuesday. A 2 h absence leaves 6 h available. An applicable public holiday on the same day reduces availability to 0 h and prevents deducting the absence twice. Anyone excluded from the holiday keeps their schedule, unless they have their own leave entry.



Application screen with fictional data. Open the screen in the guide

Report time zone

Field or action	How to use it
Report time zone	Choose the region used to display dates and times and to assign a worklog's start to the correct day. For mainland Portugal choose the Europe/Lisbon time zone. The local time shown below the field helps you check the choice.

Add and review holidays

Field or action	How to use it
Holiday date	Required. Enter the holiday date as day/month/year. For a municipal holiday, enter the date observed at the workplace.
Holiday name	Required, up to 100 characters. Use a recognizable name, such as “Municipal holiday”.
Applies to	Choose All people for a shared holiday or Selected people for a specific location or group. For Selected people, tick at least one name. The same setting is available in the national preview.
Exceptions: excluded people	Tick anyone who should keep their normal schedule on this date. An exclusion takes priority even if the person is on the selected list. Clear exclusions removes these exceptions.
Source	Expand a saved holiday to see whether it was entered manually, imported from a national list or read from Excel. The same detail shows who is included and who is excluded.
Country	In the national holiday importer, select the country whose calendar you want to review. Use Add holiday for regional, municipal or company-specific days.
Year	Enter the year and select Preview holidays. Review dates and coverage before applying. Repeating the import preserves edits to holidays already imported.
Saved public holiday year	This filter appears when holidays are stored for more than one year. Choose a year or select All years for the full list.
Person	In Vacation and other leave, filter the saved periods. All people shows the whole list again. Filtering by a person also preselects them when you open Add leave.

Record time away

Field or action	How to use it
Person on leave	Required. Select the person whose availability will change. If they are missing from the new leave list, complete and activate their profile under People and schedules.
Leave type	Choose Vacation, Sick leave or Other absence. The calendar and person analysis display the time in the corresponding category.
From	First day of leave, inclusive. For a single day, enter the same date in both fields.
To	Last day of leave, inclusive. Use the same date as From or a later one. If a leave entry already covers those dates for the person, edit the existing entry or choose a non-overlapping period.
Hours per day (blank = full day)	Leave blank for full-day leave. For partial leave enter the hours absent on each day, for example 2. The number must be above 0 and at most 24. The deduction is capped at that day's scheduled hours.

Import the annual leave file

Field or action	How to use it
Excel file (.xlsx)	Select an annual leave export with a “PlanoFerias” sheet, up to 16 MiB. The sheet must identify the year, company, workplace, employee numbers and names, January to December dates and a legend. FF marks vacation, BB sick leave and FE a public holiday.
Employee in Excel	Shows the number and name from the workbook. Compare them with the Jira person. Correct wrong or duplicate numbers in the workbook and reopen it.
Jira person	The account comes from People and schedules. The same employee number matches automatically. A name suggestion requires confirmation. Use Choose a person when names look alike.
Matching	Confirm the correct match or use Skip to leave the employee out of this import. Reset lets you revisit a skipped row. A newly linked number can be added to the profile when you save.
People to import	Compare the number of matched or confirmed rows with the total rows. People without a linked account are left out of the import.
Include holidays for the selected people	Appears when the workbook contains holidays. Keep it selected to include those dates for the people covered by the import, or clear it to process leave only.
Planned vacation days (FP), excluded from import	FP marks vacation that is still planned. The count is for reference. Only confirmed vacation creates new vacation entries.
View changes	Review additions, removals, updates and new links. When importing the same plan again, compare the proposed periods before applying.
Conflicts to review	Open the list to identify the person and date. Check the profile, existing manual entry or Excel row, and correct the source identified in the message.

How to check Save configuration and open Analysis → Reports → Capacity for the person and date range. Check the expected hours on the affected date. In v0.17.14, holidays and leave on Saturdays and Sundays deduct no hours, even when a weekend shift is scheduled.

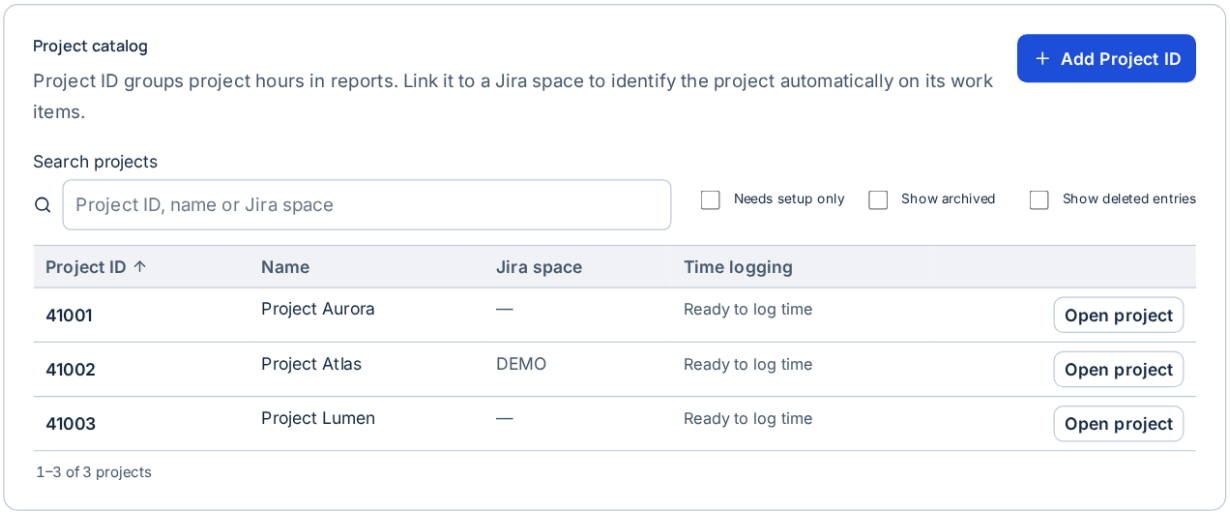
Project IDs

Organization → Entry de tempo (time entry) → Project IDs

Set the code that groups a project's hours and the Jira issue that receives entries from the timer or the main time-entry form. An organization manager or Jira administrator can set up the project.

1. To change a project, search for its code, select "Open project", then "Edit project". To create one, select "Add Project ID" and enter its code and name.
2. In "Edit space and destination", select the space and general time issue. If several projects share a space, you can choose "Use an issue without linking a space". Select "Apply destination".
3. To make activities available on an existing project, open its details and select "Edit project". In the historical activities section choose its activity group, finish editing and select "Save configuration".
4. If someone requested the project, open "Pending requests". Link the request to an existing project that is ready for use, or create one from the request. Once it is available, the requester can resume and save their entry in My time.

Example The space "41020 – Project Atlas" suggests code 41020 and name "Project Atlas". Link issue DEMO-10 and the "Engineering" group. Someone opening 41020 in the time-entry form will see that group's activities.



Application screen with fictional data. Open the screen in the guide

Find a project

Field or action	How to use it
Search projects	Search all pages by code, name, alternative code, or space key/name. Results are sorted by ascending Project ID, ten per page.
Needs setup only	Show active projects that need a destination or a correction. The "Time logging" column tells you what each row needs.
Show archived	Include archived projects to inspect their details or reactivate them.
Show deleted entries	Include removed entries. Restore brings an entry back as archived. Use Reactivate to make it available again.

Create or edit the project

Field or action	How to use it
Enter manually	Enter the code and name yourself. After adding the project to the draft, set the destination and save the configuration.

Field or action	How to use it
PDP project from a space	Select the existing space. If its name starts with a numeric code, ScopeTime suggests the code and name. Check both before adding.
Project ID	Required unique code, up to 40 characters. If it already exists, use “Open existing project”.
Name	Required project name shown beside the code in the picker and catalogue, up to 100 characters. Choose a unique name your team recognises.
Status	Choose Active for ongoing work or Closed when the project has finished. The list shows the Status column when there are non-active states.
Jira space	Search by name or key and select the space. Issues in that space can identify the project automatically.
General time issue	Search for an issue in the space by key or title. The main timer uses this destination. Logging from inside a Jira issue or subtask records time on that issue.
General time issue type	When preparing a general time issue, select an available type if a new issue is needed. Creating it in the space takes effect in Jira immediately. Then apply the destination and save the configuration.
This project’s Jira issue	If the project has no dedicated space, find and select the existing issue that should receive entries from the main form or timer.
Activity group	Select the group for this Project ID. Its active activities become available when logging time. “Edit activities” opens the shared group.

Set the project plan

Field or action	How to use it
Set planned hours	Enable to compare planned and logged time over a period. Leave it off if the project has no estimate.
Planned hours	Enter the project’s planned total, from 0 to 1,000,000 hours, with up to two decimal places.
Plan start	First day covered by the estimate. Supply both dates when setting planned hours.
Plan end	Last day of the period, on or after the start date. The period can cover up to 366 days including both dates.

Find codes and set up internal time

Field or action	How to use it
Find Project IDs in Jira issues	First link and save the Project ID issue field under Jira fields. Search accessible issues, review the candidates and add them to the draft. Set a destination for each new project.
Diversos Jira issue	In advanced time destinations, choose where internal work entered outside a Jira issue should be recorded. Apply the destination and save the configuration.

Handle Project ID requests

Field or action	How to use it
Use an existing project	In Pending requests, pick a saved, active and open project with a time destination. “Link project” resolves the request immediately.
Create Project ID	Open a new project using the request details. Check the code, name and destination, then save the configuration to make it available.

Field or action	How to use it
Email me when a new project is requested	Administrator preference under Pending requests → Email notification. Enter the notification issue and select “Save preference”. The form indicates if another administrator currently receives these alerts.
Jira issue for notifications	Enter an existing issue key, such as DEMO-20, to provide context for new-request notices. This field belongs to the requests queue.

How to check After saving, search for the code, open its details and verify “Ready to log time”, its issue and its activities. Closing the details takes you back to the same page and row.

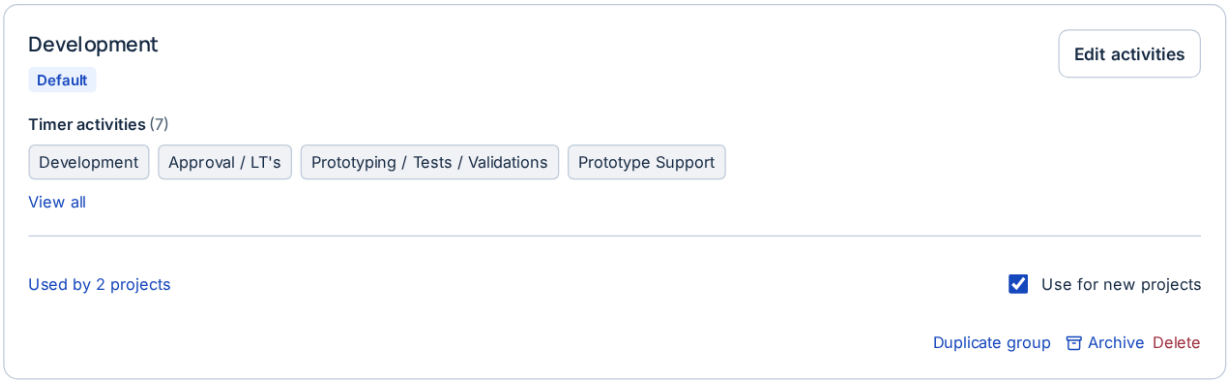
Activity groups

Organization → Entry de tempo (time entry) → Activity groups

A group is the list of activities available when logging time. Several projects can use the same group. Miscellaneous contains the choices for internal work without a Project ID.

1. Select New group or Edit activities. Name the group, then create or select its activities. Use the arrows to set their display order.
2. Select Apply to draft and then Save configuration. For an existing project, open Project IDs → Open project → Edit project and select the group in the historical activities section.
3. To use the same list for new projects, select Use for new projects. To edit internal activities, use Edit activities on the Miscellaneous card.

Example Two projects use “Engineering”. If you add “Design review” to the group, both offer that choice. To make it available on a third project, assign “Engineering” in that project’s details.



Application screen with fictional data. Open the screen in the guide

Edit the group

Field or action	How to use it
Group name	A unique name administrators will recognise when assigning the group to a project, up to 100 characters. The reserved Miscellaneous group has a fixed name.
Activities in this group	Each row is one activity. Use the up and down arrows to change its position in the picker.
Activity 1, 2, …	Edit the name on its row. Check “Also used in” before renaming because the listed groups share that activity.
New activity	Enter a name, such as “Testing”, and choose Create activity. Use a recognisable name that describes the work.
Existing activity	Under Use an existing activity, select its name and add it to the group. This lets teams classify the same kind of work consistently across projects.
Remove from group	Remove the activity from this list only. Archiving it on its row hides it from new entries in every group that uses it.

Field or action	How to use it
Timer activities	Check the preview of active activities. When there are more than four, use View all to see the full list.

Projects using the group

Field or action	How to use it
Use for new projects	Make this group the default for future projects. For an existing project, choose the group in its project details.
Used by … projects	Open the list of projects sharing the group. Search by code or name and choose “Open project” to inspect the association.
Duplicate group	Create another group with the same starting list. Both groups continue to refer to the same activities as long as they are included in both.

Internal activities and archiving

Field or action	How to use it
Miscellaneous	Set internal activities, such as Training. Anyone logging time under Miscellaneous must select an activity from this list. Selecting an activity is optional for project work.
Show archived	Show archived groups. Reactivate a group and save to make its active activities available again.
Show deleted entries	Show removed groups. Restore returns a group to the archived state.

How to check Find the project under “Used by … projects”. Open Log time, select its Project ID and check the Activity type (optional) list.

Jira fields

Organization → Entry de tempo (time entry) → Jira fields

Link existing Jira issue fields to ScopeTime. When someone opens an issue, they can use the project code and activity already entered by the team.

1. With configuration access, open Jira fields. Under the issue Project ID field, select the actual field used by your team, then add it.
2. Repeat for the activity under the issue activity type field. If different spaces store the same information in different fields, you can add them to the same group.
3. Save the configuration and open an issue containing known values. If fields have changed in Jira, reload the field list.

Example One space uses “Internal code” and another uses “Project code”. Add both to the Project ID group. If an issue returns two different codes, confirm the correct one in the entry.

Fields and options

Field or action	How to use it
Issue Project ID field	The issue field containing the project code, such as 41020. The code must match the catalogue for ScopeTime to recognise it.
Campo Tipo de atividade da tarefa	This is the issue’s activity type field. Choose the Jira field whose values match the activities available for the selected project or internal work.
Add field	Select a Jira field and confirm with the button of the same name. Each group allows up to 20 fields. If the values disagree, the person logging time confirms the classification.
Remove	Remove this mapping from ScopeTime. The Jira field and the values already on issues are retained. Save the configuration to apply the change.

Field or action	How to use it
Reload fields	Refresh the list of fields available in Jira. Use it after creating a field or changing permissions.

How to check Open a populated Jira issue and check the project and activity in its ScopeTime panel. Team and department come from the person's People and schedules profile.

Access

Organization → Administration → Access

Jira administrators choose who can use the app and who can view organization analysis. Issue visibility continues to follow each person's Jira permissions.

1. With a Jira administrator account, choose whether all users with Jira access or only listed people can open ScopeTime.
2. Search for the person, select Add next to the name and choose a role. Use Remove access to remove an explicit assignment.
3. Save the configuration. When all Jira users can access the app, removing someone from the list removes the assigned role while preserving normal user access.

Example Give someone who only logs their own hours the User role. Choose Organization manager for someone who configures schedules and analyses hours by department.

Fields and options

Field or action	How to use it
App access	Allow all users with Jira access, or restrict the app to listed people and Jira administrators. Jira administrators retain access in both modes.
Search for a person to authorize	Enter at least two characters and choose Search. Check the account name before adding it to the list.
Access role	Choose User, Reports or Organization manager for this person. Changes take effect when you save the configuration.
User	Can log time, edit their own entries and view My time.
Reports	Legacy role with personal access to My time. Organization-wide analysis and reports require an organization manager or Jira administrator.
Organization manager	Can manage organization settings and schedules and view reports. A Jira administrator manages access assignments.
Organization analytics	Shows who can view this area. It is available to organization managers and Jira administrators, subject to issue visibility.

How to check After saving, reopen the list and verify the role beside the correct account. An organization manager asks a Jira administrator to amend this list.

Emails

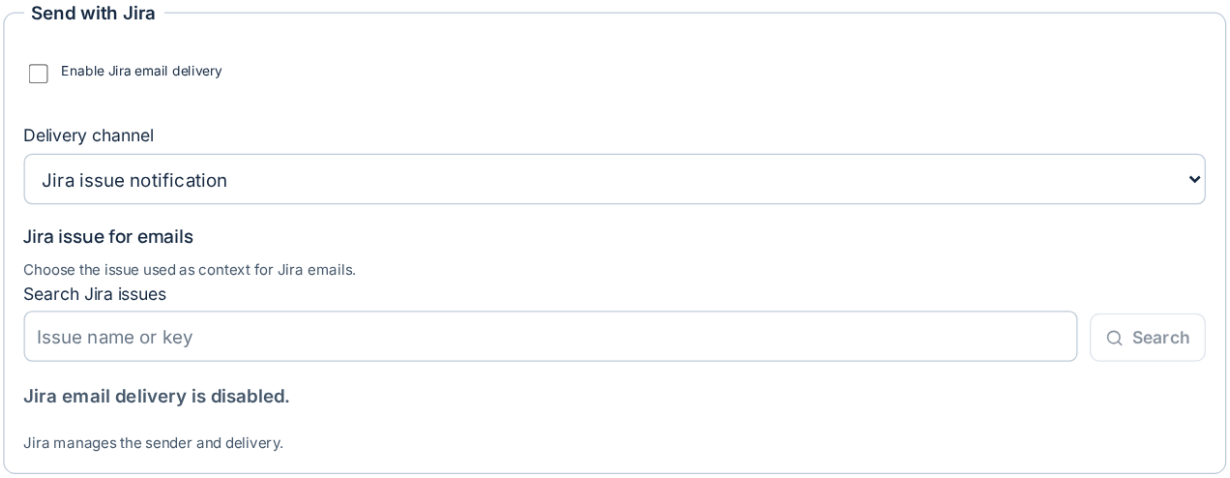
Organization → Administration → Emails

Set up personal reminders and summaries. Each person receives only their own Jira account's information. The delivery channel applies to the organization.

1. Enable Jira email delivery. Choose the channel, message type, schedule and recipients. Save the configuration.
2. With Jira issue notification, search for an existing issue and select it from the results before saving. The email can include the Jira issue, its key and comment action.

3. For an email without the issue card, choose Jira Automation · no issue. Create a scheduled rule in Jira Automation at or after the configured time in the organization's time zone. For weekly summaries use the same weekday.
4. In the rule, add ScopeTime personal reminder, connect the recipient's account and select Daily or Weekly. Continue when the send output is true. In Send customized email, use recipient for the address, subject for the subject and htmlBody for an HTML message (or body for plain text). Save and enable the rule. Each person needs a separate rule with their own connection.

Example To start with Team Alpha, select that team and enable the weekly summary for Friday at 16:00. In the issue channel, include your own account if you want to try "Send a test summary to me".



Application screen with fictional data. Open the screen in the guide

Enable and choose a channel

Field or action	How to use it
Enable Jira email delivery	Enable delivery through the selected channel. For scheduled messages, also enable the daily reminder or weekly summary and save.
Delivery channel	Jira issue notification sends through a selected issue. Jira Automation · no issue passes the content to a personal rule which sends the email.
Search Jira issues	For issue notifications, enter an issue name or key, search and select the issue. Choose an issue that recipients can access.

Schedule delivery

Field or action	How to use it
Time zone	Check the time zone used by the schedules. To change it, open the organization's People and calendars group and its calendar and absences tab.
Send when time is missing	Enable reminders about the last completed working day. Holidays and absences reduce the expected time. A partial query can flag entries for review while omitting an uncertain shortfall.
Reminder time	Local time from which the daily reminder is eligible. An Automation rule must run at or after this time.
Send the weekly summary	Send that person their hours and project breakdown from Monday to the time the summary is prepared.
Summary day	Choose the weekday for the summary, Monday to Sunday. In Automation, select that same day in the rule trigger.
Summary time	Local time from which the weekly summary becomes due on the selected day.

Choose recipients

Field or action	How to use it
Recipients	Choose all active people in the organization or select specific people or teams. Access is checked before sending.
Teams	Select one or more active teams to include their members. Someone chosen individually and via a team receives one message.
People	Select the active people to include individually. If someone is missing, check their People and schedules profile and app access.

Test and review delivery

Field or action	How to use it
Send a test summary to me	In the issue channel, send a weekly test summary only to your own account. You need an active profile included in the recipients. Save the configuration, check the issue and wait if you recently requested a test.
Preview reminder	Show the reason and, when available, your personal reminder content. Save pending form changes first.
Preview summary	Show the subject and text of your personal summary without sending. Use the preview to check the period, projects and hours.
Email status	Refresh the status to inspect results for each person. A queued status means Jira accepted the request. With Automation, “Message prepared for the rule” means the content was passed to the rule.

How to check For issue notifications, confirm receipt in the mailbox and its filtered folders. With Automation, test the rule in Jira, inspect its audit log and verify the message in the recipient’s mailbox.

History

Organization → Administration → History

Check when configuration changed, who saved it and which fields changed. Organization managers and Jira administrators can consult this read-only screen.

1. Open Organization → Administration → History and find the change by date or revision.
2. Read Changes to identify the area and fields involved. To view or correct the current value, open that area’s tab.

Example After saving a new schedule, People and schedules and Schedule may appear on the same row. Open the person’s profile to see the hours currently in effect.

Fields and options

Field or action	How to use it
Date	Shows when the change was saved in the organization’s time zone.
Author	Identifies the person who saved the change. The name may be unavailable if that identity was removed for privacy.
Revision	Configuration revision number after saving. Two areas changed in a single Save configuration operation can share the same revision.
Changes	Shows affected areas, field names and, where applicable, the number of entries involved. The history covers up to 40 changes from the last 90 days and records what changed, without storing previous values.

How to check Match the author and revision to the save you are looking for. If the history is empty, no changes are available for the period shown.

Open the ScopeTime Help Center