Pilot setup guide

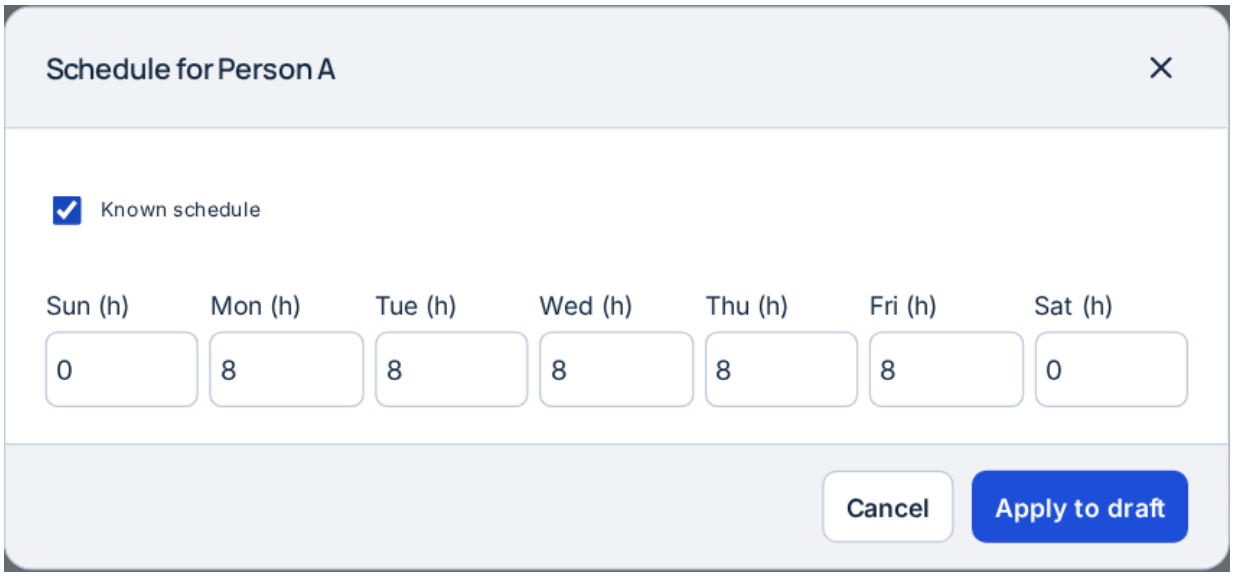
Use a Jira administrator account, a team member account and a test project both can access. This exercise creates two real 15-minute worklogs in Jira. Use issues set aside for the pilot.

Prepare the team and test account

Start by defining the structure and the schedule ScopeTime should use for the person’s work.

1. Open Apps → ScopeTime → Organization → People and calendars. Create or check the department, then link the team to it in Teams. To test the team timesheet, have a Jira administrator assign its lead.
2. In People and schedules, find the member and choose Set up profile if needed. Select their department and team. Enter their real schedule. For this example, choose someone scheduled for eight hours on the test weekday and zero on their rest days.
3. After reviewing public holidays and absences, confirm the calendar for the test period. Save the configuration. As a Jira administrator, review Administration → Access. If access is restricted to listed accounts, add the member and save.

How to check Sign in as the member. They should be able to open My Timesheet and the pilot Jira issue. The employee number is optional.



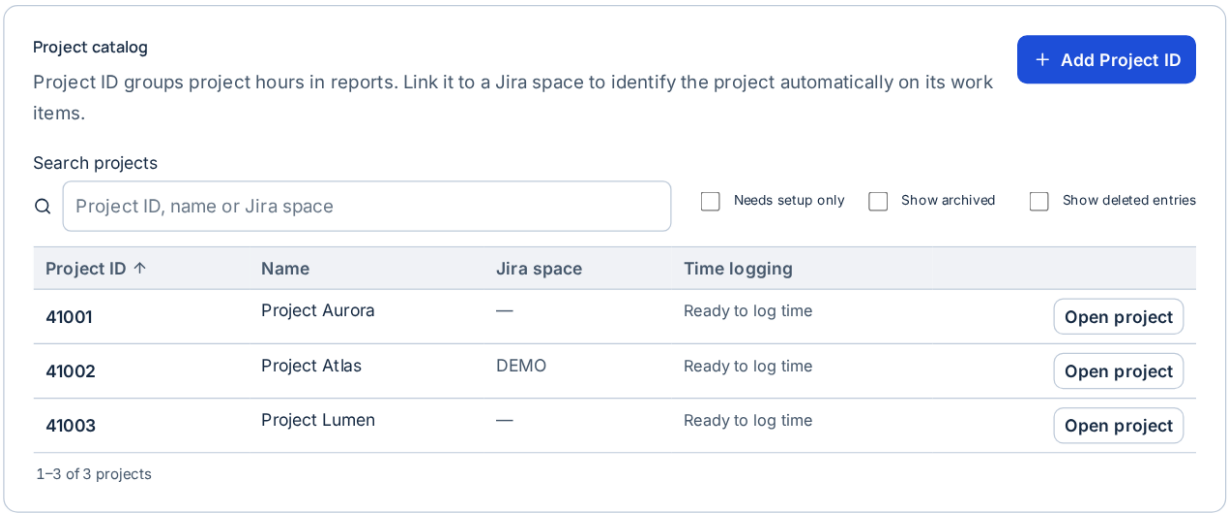
Example in the application. Open the screen in the guide

Set up a project and its activity

In this example, 90001 is the Project ID, ENS-24 is the work issue and ENS-90 receives the project’s general worklogs.

1. In Organization → Project IDs, search for the code first. Choose Add Project ID only if the project needs to be created. Enter its code and a recognizable name.
2. In the project profile, link the correct space and select the general time-tracking issue. A project without a dedicated space can use Use an issue without linking a space. Choose Apply destination and save the configuration.
3. To test hours by activity, check that an activity group contains an active test activity. In Edit project, select that Activity group and choose Save configuration.

How to check With the member account, open Log time, choose 90001 and check that the activity is available. Under Description and details, the destination issue should be ENS-90.



Example in the application. Open the screen in the guide

Log two entries and reconcile the total

Choose one workday and two consecutive times. Use the same person, Project ID and activity type for both entries.

1. Log 15m at 09:00 on the selected day from ENS-24 → ScopeTime → Log hours. Select the test activity type and save.
2. Log another 15m starting at 09:15 from My Timesheet → Log time → Project ID 90001. Choose the same activity type and save.
3. Check both keys and durations in Worklogs. With collective analysis access, export Reports → Hours by project for the period. In Hours by activity → View, filter by the same Project ID.

How to check In this isolated test, ENS-24 has 15 minutes and ENS-90 has 15 minutes. The project shows 30 minutes for the same person and the selected activity type totals 30 minutes.

Check a day of leave

Choose a second eight-hour workday with a confirmed calendar, no public holiday and no logged work. If there is already an imported absence for this test, use the existing period.

1. In My Timesheet → Holidays and absences → Add period, select leave, enter the date and choose a full day. Choose Save period. When using the annual Excel file, review matched people and dates in the preview before applying and saving the configuration.
2. In Team timesheet, choose the team and month. Open the member’s analysis and compare its work and leave categories with the two test dates.

How to check For this isolated period, 30 minutes of work and eight hours of leave give an accounted total of 8 h 30 min. The project report still shows 30 minutes.

Try a missing project request

Choose a test code that is absent from the catalogue. This exercise checks that the person can recover the date, duration and description they already entered.

1. In the member’s manual entry form, enter 30m and a recognisable description. Search for the missing code, choose Request a Project ID and submit the request.

2. As a catalogue administrator, open Project IDs → Pending requests. Select a suitable existing project and choose Link project, or create the project, configure its destination issue and save the configuration.
3. With the member account, open My Timesheet → My time entry drafts → Resume time entry and check the restored values. Choose Save entry if you want to complete this test worklog.

How to check Submitting the request preserves the draft. Final confirmation on the form creates the worklog. Use a separate project or period to keep the previous 30-minute test isolated.

Test planning and email if the team uses them

A reservation checks how planned and logged time compare. The email test verifies delivery to the intended mailbox.

1. For the example with only the two 15-minute entries, a Jira administrator opens Planning → Plan hours and allocates four hours at 100% to the same person, project and month. Open Planned vs. actual and compare using the same filters.
2. In Organization → Administration → Emails, choose the channel and save. For issue notifications, send the test summary to the current account. For Jira Automation · no issue, test the rule and the recipient’s personal connection.

How to check At 100% efficiency, the isolated comparison shows four hours planned, 30 minutes logged and a difference of −3 h 30 min. For email, check the message in the inbox or the folder selected by mail rules.

Open the ScopeTime Help Center