Reliex

ActivityTimeline
Admin Guide

Contents

1. Introduction

Activity Timeline for Jira Cloud provides a visual resource planning and project tracking dashboard to schedule Jira tasks along with custom events; calculate workload, availability and utilization; generate timesheets and reports.

The installation process is identical to most Atlassian Marketplace application and consists of 2 simple steps. **Activity Timeline** has four different modules for a full workflow: **Plan. Work. Track. Report**

Plan. This module of ActivityTimeline add-on allows to do resource/project and capacity planning. Plan and manage teamwork, schedule events, vacations, bookings and tasks, calculate workload and availability.

Work. This module provides an all-inclusive personal workspace for everyday work: personal tasks and schedule, logging worked hours, see overall progress of own timesheet and display required utilization on the worklog charts.

Track. Timesheets module on Track view provides managers with a quick and easy overview of logged time and ability to approve/export the timesheets.

Report. ActivityTimeline add-on allows generating various Web and Excel reports based on workload, skills, availability, logged work hours and utilization.

ActivityTimeline is intended to help managing service, consultancy and creative teams with a dynamic working schedule, frequent changes requests and people shared between projects.

2. Installation

1. Log into your Jira Cloud instance as an admin.

2. Click the admin dropdown and choose **Apps**. The *Find new apps* or *Find new add-ons* screen loads.

3. Locate **Activity Timeline for Jira Cloud**.

4. Click **Free trial** to download and install the app.

5. Click "**Configure**" button on the **Manage apps** page:

   Select Projects to manage in ActivityTimeline and click "**SELECT & PROCEED**" button below:
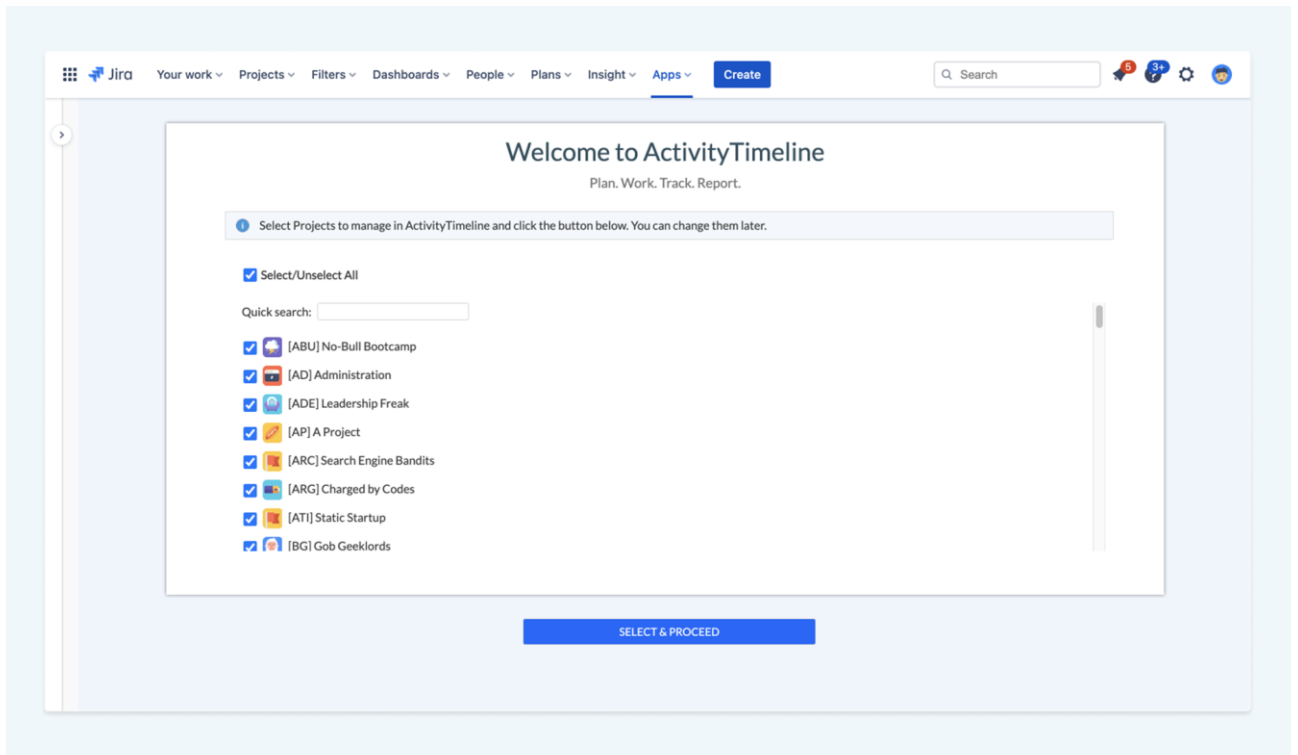
6. Wait a couple of minutes until system initialized all the necessary data.

Click "**FINISH**" button when the operation is complete:
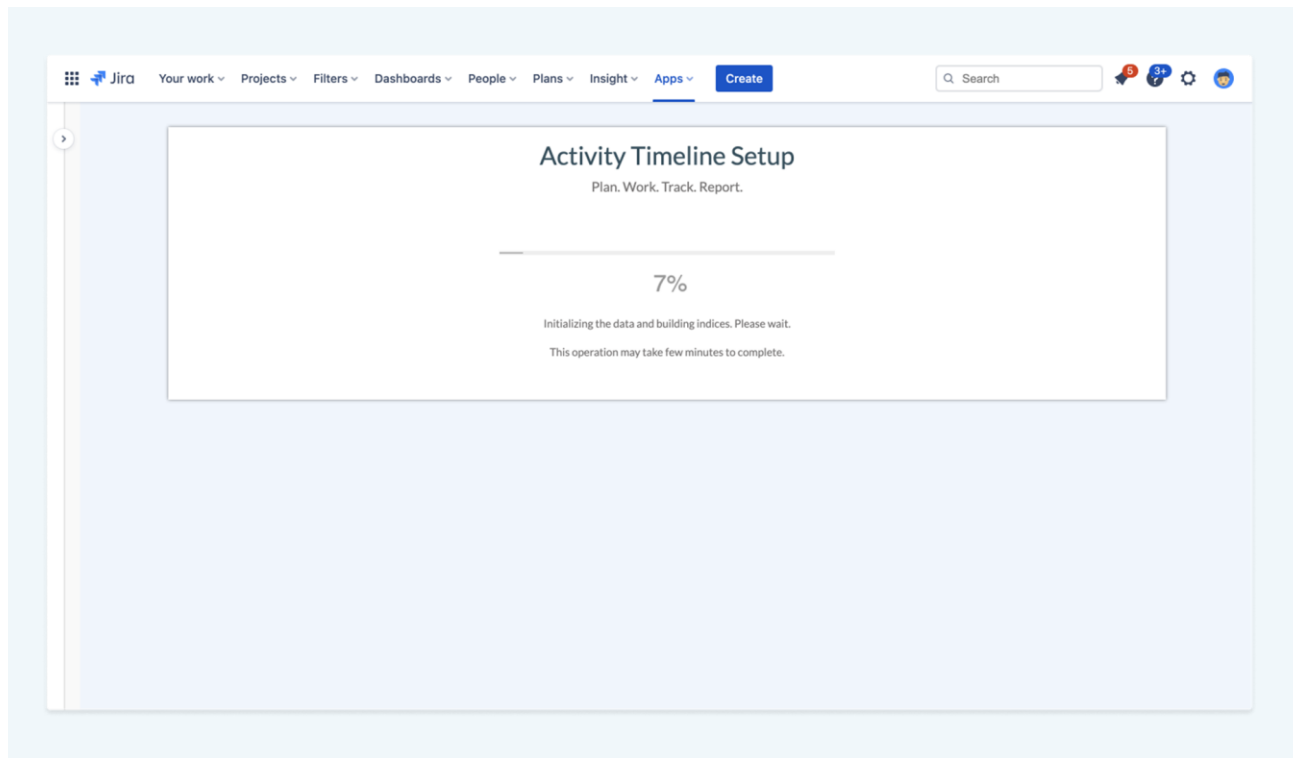
3. User Management

Important Note: Adding/deleting or updating users here will NOT affect Jira system.

By default, every user that is enabled in Jira can access ActivityTimeline and see his/her personal schedule and worklogs. If you would like to restrict an access to the Dashboard for someone, you can do that by changing user roles on "Edit Person page".

To navigate to users' management page click go to **Configuration** tab on Context Navigation toolbar on the left and switch to *Users* tab.

You should see a page like this:

The list of all available users is represented on this page. Here you can change default person involvement for all active users, edit existing users, add position and skills, check the teams list of a user, delete users from ActivityTimeline.

On Vacation Management page possible to define how many approved vacation days each user can have in every calendar year.

Detailed documentation:

User Management→

Vacation Management→

Add position and skills possible directly on the **Users page** by clicking on the field next to the user's name.

Click on *Edit* link to edit user's details and roles/permissions. You should see the page like below:

You may edit User's full name, define person's involvement in hours per day either the same for all days or custom one for each week day. For example, user can work 8 hours on Mondays and Fridays and 4 hours/day during Tuesdays, Wednesdays and Thursdays.

Uncheck **Enabled** checkbox to restrict an access for that user to the Dashboard. Also, you may restrict an access by unselecting all roles.

A click on **Update** button will save your changes. A click on **Delete from ActivityTimeline** button will delete this user from ActivityTimeline but **NOT** from Jira.

To refresh the list of ActivityTimeline users from Jira switch to **Synchronization → Refresh Users** page. The system will synchronize the list of Jira users, automatically assigns the default Limited Employee user role to new users.
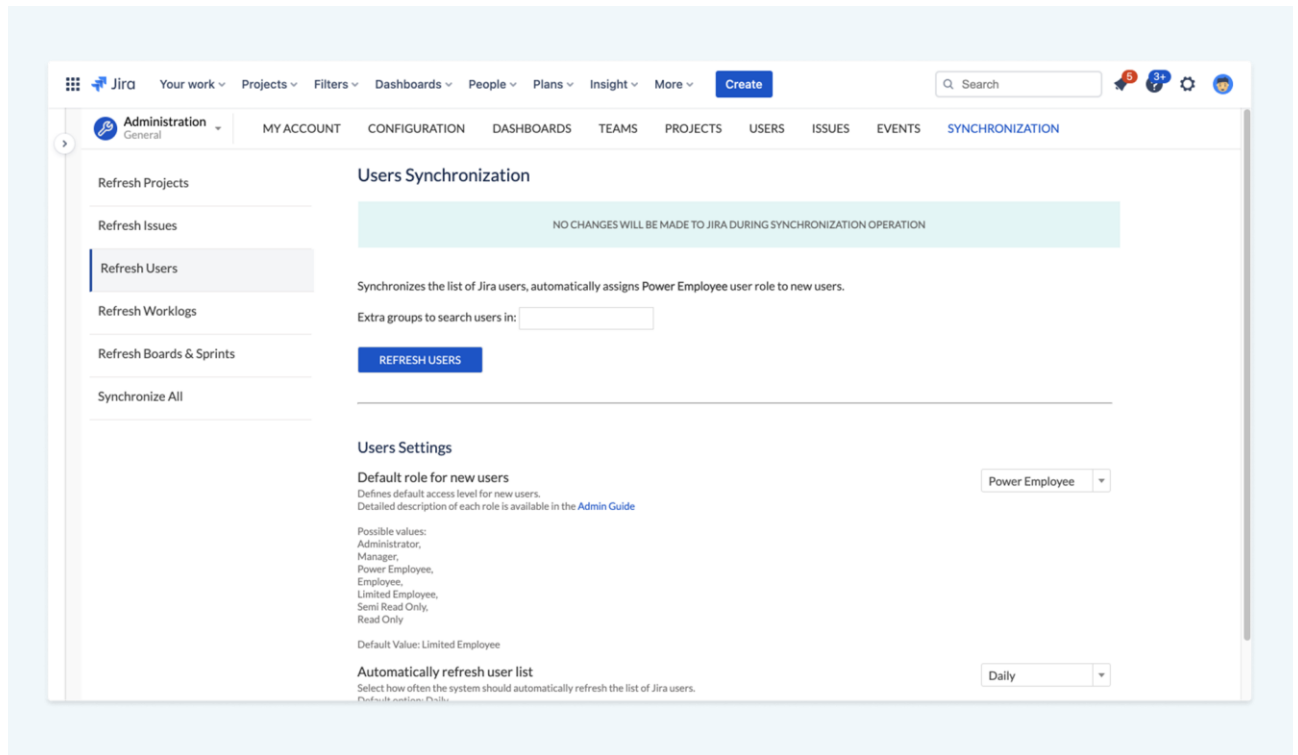
Important Note: Deleting a user in ActivityTimeline will NOT restrict his/her access to ActivityTimeline Dashboard, as the user may open ActivityTimeline page one more time and the system will automatically create the default account for him/her. Use "Enabled" checkbox and roles to restrict an access.

As alternative, you may set **Default role for new users** property in **Synchronization -> Refresh Users -> User Settings** to **No Access** so that newly added Jira users will not have an access to ActivityTimeline's Dashboard by default.

4. User Roles

There are five user roles and two different restrictions available in ActivityTimeline application. Those roles and restrictions may not match the roles in Jira.

4.1 Administrator Role

User with this role has full access to all ActivityTimeline configuration settings including **Plan, Work, Track, Report** pages. This user may delete other users and change permissions of other users.

Only a user with an Administrator role may access Setup Wizard, perform a refresh of users or projects from Jira, see and manage teams' and users' data. Administrator Role has full access to all ActivityTimeline configuration settings including the Dashboard.

4.2 Manager Role

User with this role has full access to **Plan, Work, Track, Report** pages and can manage users and teams. He/she can edit members of existing teams and create new teams. User can create/edit and approve custom events like Bookings, Placeholders or Vacations.

4.3 Power Employee Role

User with this role can access **Plan, Work and Report** pages, view Jira tickets and perform a drag'n'drop, move or resize of Jira tickets. User can create/edit custom events. The system will not update Jira ticket of Jira project 'A' if user does not have permission to view/edit issues in Jira project 'A'. The changes will disappear from the Dashboard after page refresh.

4.4 Employee Role

User with this role has an access to **Plan, Work and Report** pages and to the data of the teams he/she belongs to. This user can see just the issues that were assigned to him/her and their teammates. User can create/edit custom events for teams he/she belongs to.

4.5 Limited Employee Role

User with this role can see his/her own data only on Plan, Work and Report pages. This user will see just the issues that were assigned to him/her. User can create/edit custom events on his/her timeline only.

This role is set as default role for newly added users. This can be changed by **Default role for newly added users** setting in **Synchronization -> Refresh Users page**.

4.6 Read Only Restriction

This restriction is not a separate user role, but an additional property to other roles. Users with this restriction will not be able to perform any changes in Plan and Work module and simply will see the planned items. This restriction is recommended for Employee roles only.

4.7 Semi Read Only Restriction

This restriction should be applied in addition to other employee user roles. User with this role will have a read-only access to the planning dashboard except his/her own timeline and assigned tasks.
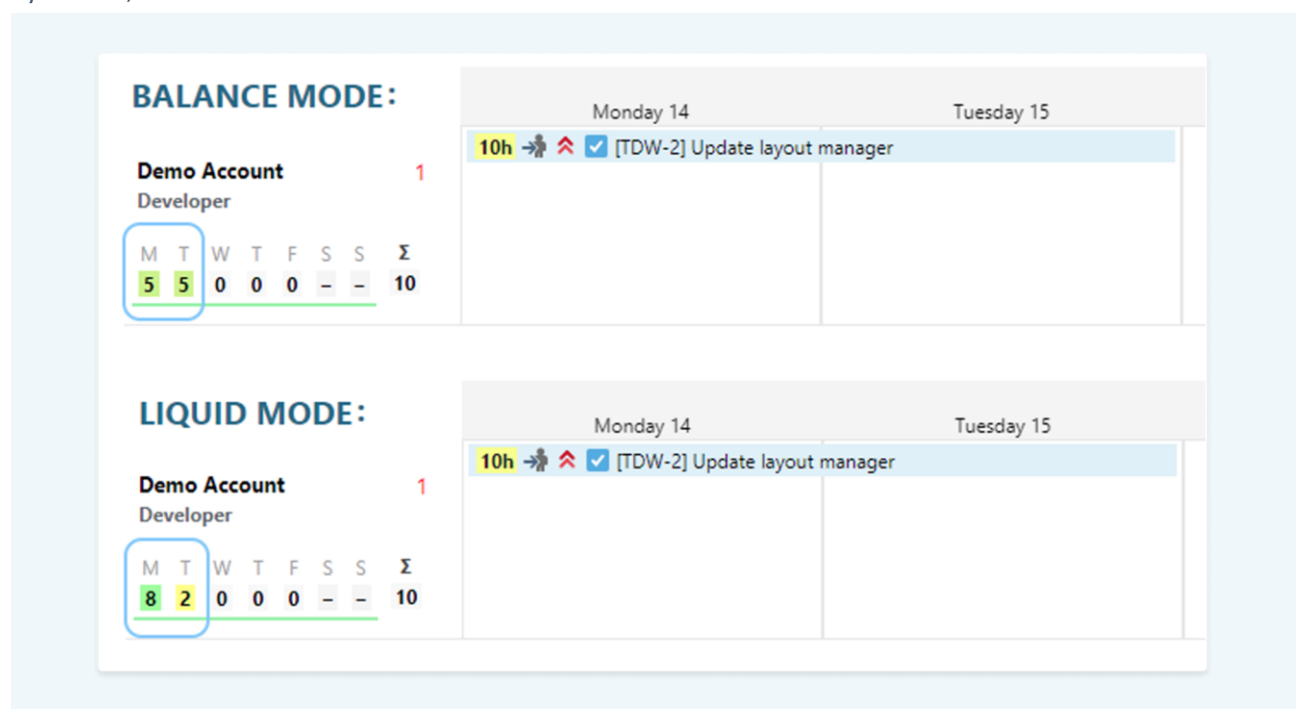
5. Workload Calculation modes

Workload Indicator displays how many hours are used per each work day by each person based on remaining estimate of scheduled Jira issues. The system respects weekends, days off, sick leaves, holidays and vacations during workload calculation.

It calculates all Jira tasks across all projects assigned and scheduled to every person. In addition, Workload Indicator displays total amount of person's work hours for the week.

There are two workload calculation modes:

- **BALANCE** - number of remaining hours are split equally across scheduled days. *Examples:*
  - 12 hours task scheduled for two days would take 6 hours each day;
  - 12 hours task scheduled for three days would take 4 hours each day;
  - 3 hours task scheduled for three days would take 1 hour each day.
- **LIQUID** - workload is calculated based on the remaining estimate and 8 hours work day. Work hours will transfer to the next day if the issue is scheduled for more than one day and the previous days are fully booked. *Examples:*
  - 10 hours task scheduled for two days will get 8 hours scheduled for the first day and 2 hours moved to the second day;
  - 1 hour task scheduled for two days would be completely moved to the second day if there are already 8 hours of tasks scheduled for the first day;
  - 4 hours task scheduled for two days would take 4 hours of the first day and 0 hours of the second day.

By default, BALANCE mode is turned on.

Detailed documentation: Workload Indicator→

You may change Workload calculation mode in Configuration > **Workload Indicator** page.

In Time Tracking section change **Workload Calculation Algorithm** property.

Different color indicates person's workload of any particular day:

- grey (0 hours - nothing scheduled)
- yellow (less than 50% h/day)
- olive (between 50-88% h/day)
- green (between 88-100% h/day)
- light red (between 100-125% h/day)
- red (more than 125% h/day)
- purple (issue is assigned on Logged time, Day Off, Vacation, Sick Leave or Holiday)
- blue (Day Off, Vacation, Sick Leave or Holiday is scheduled on a user)

Workload ranges are automatically adjusted in accordance to person's involvement.

Worklogs & Workload mode displays both past and future: work logs for past, workload for future (based on remaining estimate of scheduled issues):

Availability mode displays how many hours the person is still available to do in future (capacity):
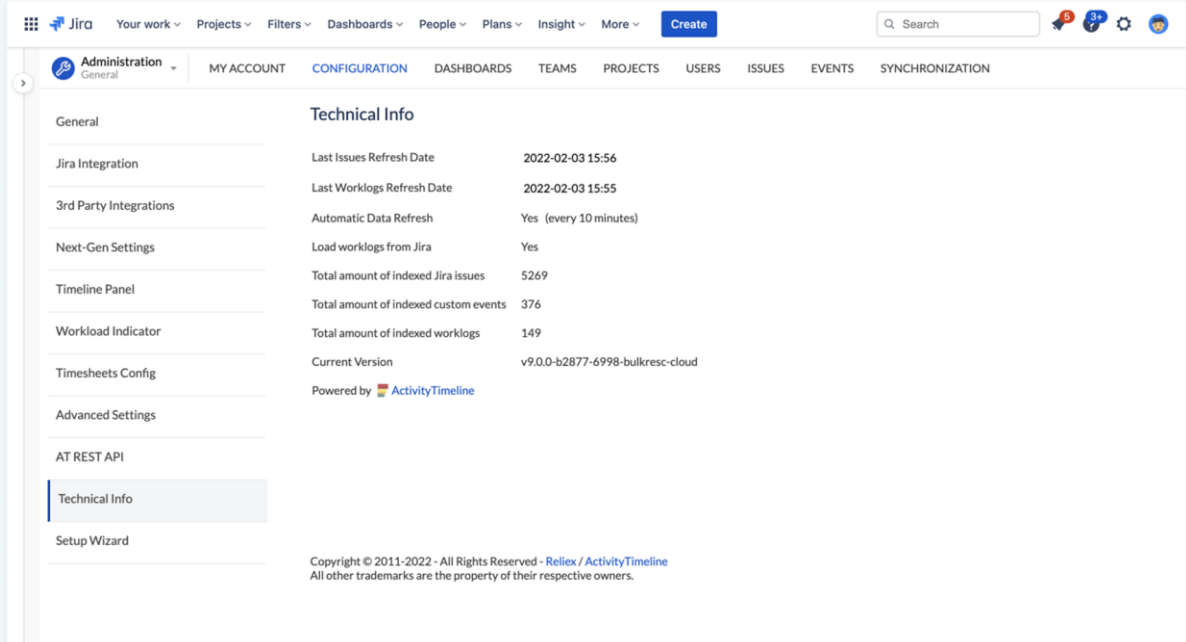
6. General Settings

ActivityTimeline administrator can change general settings, Jira integration settings, the settings for timeline panel, workload indicator, Advanced settings etc.

In Technical info tab admin user can see general settings such as:

- Last Issues and Last Worklog Sync Dates
- Automatic Synchronization (Yes/No)
- Total amount of indexed Jira Issues and custom events
- Current Version of ActivityTimeline

7. Jira Integration Configuration Settings

To change Jira Integration configuration, log into ActivityTimeline as an administrator, click **Configuration** button on Context navigation toolbar and switch to Jira Integration page:
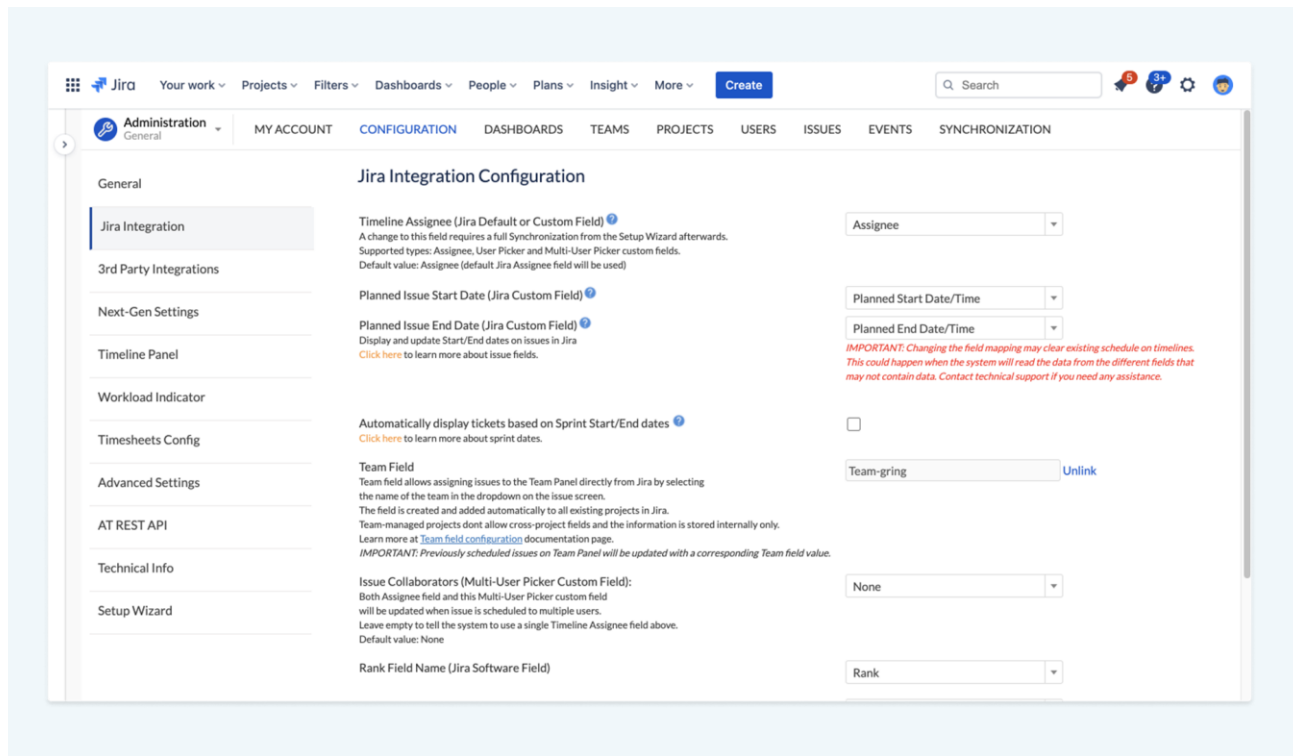
Here you can specify access to Jira and set of custom things:

1. Map Jira custom fields of date, namely, **Planned Issue Start Date** and **Planned Issue End Date**.
2. Map *Assignee* (default value = Assignee, supported types: Assignee, User Picker, Multi-User Picker fields)
3. Enable the option to "Automatically display tickets based on Sprint Start/End dates"

If task does not have planned start/end dates, then the system will use Agile sprint's start/end dates as start/end dates of a task. This will be applied to all tickets that belong to a sprint.

- Possible values: checked = turned on, unchecked = turned off
- Default value = checked
- **Required**: perform Refresh of Agile Boards/Sprints and Full Issues Synchronization after turning this feature on.

4. Map Team and Issue Collaborator fields
5. Map *Rank* **Field Name**, **Sprint Field Name, Story point Field Name, Epic Link Field Name**
   a. Those are Jira Agile fields

Map custom fields→

Automatically display tickets based on Sprint Start/End dates→

ActivityTimeline Team Field for Jira→

8. Timeline Panel Settings

In Configuration tab administrator can define the settings of Timeline Panel. The page has two sections: Timeline View and Events where you can change different options.

Default color for issues

Allows user to select default color for Jira issue bars on the dashboard.

- Possible values: Blue, Red, Orange, Yellow, Green, Purple, Violet, Livid, Teal, Olive, Silver, Gray
- Default Value: Blue

Default color for events

Allows user to select default color for custom event bars like Notes, Holidays etc. on the dashboard.

- Possible values: Green, Red, Orange, Yellow, Blue, Purple, Violet, Livid, Teal, Olive, Silver, Gray
- Default Value: Green

First Day of week

Defines the first day of the week on the calendar

- Possible values = Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
- Default value = Monday
- Workload Indicator works properly with Monday as a first day of the week only.

First Week of year

Defines the first week numbering scheme.

- Possible values:
    - Starts on Jan 1 (first week starts on Jan 1 if a year starts on Monday otherwise first week starts on the last Monday of the previous year)
    - First 4-day week (first week starts on the first week of the year that contains 4 days in this year)
    - First full week (first week starts on the first full week of the year)
- Default value: Starts on Jan 1

Weekend displaying mode

Show thin or full-sized weekend columns (Saturday and Sunday) on the calendar.

- Possible values:
    - Thin weekend columns.
    - Full sized weekend columns.
- Default Value: Thin weekend columns

Planned Start/End Dates format

Defines whether Planned Start/Planned End date custom fields has Date Picker type or Date/Time Picker type.

- Possible value:
    - Date Only (for Date Picker type)
    - Date/Time (for Date/Time Picker type)
- Default Value: Date Only
- Time zone shift/fix setting in Advanced Settings section must be set to 0 in case of Date/Time mode.

Time format

Defines time format for Date/Time fields.

- Possible values:
    - 12h am/pm clock
    - 24h clock
- Default value: 12h am/pm clock

Number of Users displayed on the timeline

Defines the number of users that are shown on the timeline per page.

- Possible values:
    - 10
    - 20
    - 30
    - 40
    - 50

- Default value: 30

Track blocked issues

Specifies if ActivityTimeline should track issue dependencies.

- Possible values:
    - unchecked - do not track issue dependencies

    - checked - track issue dependencies.

- Default Value: unchecked

Confirmation on Event removal

Specifies if ActivityTimeline should show a confirmation box when user clicked on an icon of custom event to remove it.

- Possible values:
    - unchecked - remove custom events without a confirmation dialog
    - checked - show confirmation dialog.
- Default Value: checked

Create Jira issue through ActivityTimeline

You can create new Jira issue through ActivityTimeline if setting is enabled. Otherwise, the system will open a native Jira page to create new Jira issues in a popup.

- Possible values:
    - Yes
    - No.
- Default Value: Yes

Displaying of Resolved Tickets

Controls whether to show resolved issues on timelines and whether to count their remaining time estimate for the workload.

- Possible values:
    - display resolved tickets and count their remaining time estimate for the workload
    - display resolved tickets but do not count their remaining time estimate for the workload
    - hide resolved tickets and do not count their remaining time estimate for the workload
- Default value: Show on timelines with remaining estimates

Issue statuses to mark as Resolved

There are two separate fields in Jira that mean if a task is 'Done': Status & Resolution. In order for ActivityTimeline to better understand which Jira statuses should be considered as Resolved issues, please list them in this field:

- Possible values:
    - Done
    - Closed
    - Etc.
- Default value: unchecked

Display Issues on Milestones Panel based on Due date

Milestones Panel will display issues based on the issues' Due Date field value if this option is enabled:

- Possible values:
    - Checked

        o   Unchecked
- Default value: unchecked

Deadline Warning Period

Defines the amount of days from current date till the due date of the task.

- Default Value: 7 (days)

If the due date is shorter, then the task will appear emphasized (in bold black color by default).

9. Workload Indicator Settings

ActivityTimeline administrator can define and change the settings of Workload indicator in timeline panel.

Workload Indicator Settings page has 3 sections: Time Tracking, Work Time, Employees' workplace.

Show Workload Indicator

Defines whether ActivityTimeline should show or hide workload/availability indicators.

- Possible values:
    - checked - Workload Indicator is shown
    - unchecked - Workload Indicator is hidden
- Default value: checked

Workload Calculation Algorithm

Defines calculation algorithm for Workload Indicator.

- Possible values (refer to the Admin Guide for the details):
    - BALANCE
    - LIQUID.
- Default Value: BALANCE

Time Estimate Format

Defines 'Original Time Estimate' and 'Remaining Time Estimate' values displaying format.

- Possible values:
    - Auto - estimate is grouped by periods e.g. 10 hours estimate will show up as '1d 2h';
    - Hours - estimate is displayed in hours only e.g. '10h'
    - Days - estimate is displayed in days only e.g. '1.25d'
    - Weeks - estimate is displayed in weeks only e.g. '0.2w'
- Default Value: Hours

Work hours in day

Defines the number of working hours in a day (default person's involvement in hours per a working day). It has an influence on the workload/availability indicator.
Also, this setting is used to convert long time estimates from days to hours. E.g. 2 days = 16 work hours by default.

- Default Value: 8

Tasks per day

Defines the amount of tasks a person can work on within a day. It has an influence on the workload/availability indicator. If the amount of tasks assigned to a person exceeds this number, his/her workload will be shown as overloaded in both Workload Indicator and Reports.

- Default Value: 5

Work days

Defines the list of work days. 'sat' and 'sun' are treated as weekend and workload indicator will ignore them during workload calculation as well as vacations, holidays, sick leaves and days off.

- Default Value: Mon, Tue, Wed, Thu, Fri

Worklog Chart Mode

This setting allows to configure what information to show on the bar chart in Work View. Possible options are: Show only worklogs, show both Worklogs & forecasted Workload from assigned tasks or don't show the chart at all.

- Possible values:
  - Show Worklogs only
  - Show Worklogs & forecasted workload
  - Hide.
- Default Value: Show Worklogs only

Workload & Availability Modes

Choose how the task estimate is split across days if a task is scheduled from the past to the future and has remaining time estimate.

- Possible values:
  - Distribute remaining estimate into past days (not recommended)
  - Exclude past (days/weeks/ days and today) from distributing remaining estimate

Detailed documentation: Workload Indicator→

10.Advanced Settings

Default Date Format

Specifies Date format. Should be the same as for Jira Date Picker field.

- Default Value: d/MMM/y

Default Date/Time Format

Specifies DateTime format. Should be the same as for Jira DateTime Picker field.

- Default Value: dd/MMM/yy h:mm a

Timezone shift/fix

Defines Time Zone shift in hours. Please change this value if tasks appear shifted by one day on the dashboard.

- Possible values:
  - negative value - move tasks few hours back;
  - positive value - move tasks few hours forward;
  - 0 value - no time zone shift.
- Default Value: 11.5

Custom Functionality

Turn On or Off features that are currently not turned on by default.

- Set value to a specific keyword or a combination of them to enable custom ActivityTimeline features. Default Value: 0

Reuse Jira permissions per Project

Defines whether ActivityTimeline should reuse Jira Project Permissions in addition to built-in ActivityTimeline User roles. The system will reuse Jira Project Permissions for each logged in user if enabled.

Possible values:

- checked - Jira Project Permissions and ActivityTimeline User Roles are enabled to filter issues and projects

- unchecked - Default ActivityTimeline User Roles are used to filter issues/teams

Default value: checked

Reuse Jira permissions per Issue (slow)

Defines whether ActivityTimeline should reuse Jira Issue Permissions in addition to built-in ActivityTimeline User roles. The system will reuse Jira Issue Permissions for each logged in user if enabled.

Turning on this feature will decrease performance of the dashboard.

Possible values:

- unchecked - Default ActivityTimeline User Roles are used to filter issues/teams

- checked - Jira Project Permissions and ActivityTimeline User Roles are enabled to filter issues/projects/teams

Default value: unchecked

Decimal Delimiter Symbol

Different languages have different delimiter symbol in numbers. It is required to correctly set it so that Jira can understand the value of the estimate or worklog hours. English & Chinese: choose Decimal Point; German, Russian, Spanish, French & Italian: choose Decimal Comma.

- Default Value: Decimal Point

Number of Issues to Load from Jira

Defines the maximum amount of tasks that ActivityTimeline should retrieve from Jira during Setup Wizard Synchronization

- Recommended maximum: 100000
- Default Value: 30000

Ignore issues older than (NN months)

Do not synchronize issues, which were last modified more than NN months ago.

- Default Value: 12

Amount of Issues to load per request

Defines the amount of issues to load per each request to the server.

- Default Value: 150

Issue ID in Jira

System property. Should not be changed manually.

- Default Value: 10011

Unresolved Resolution ID

Defines an extra resolution status id. Jira tasks with this ID will appear in left issues panel in addition to all unresolved tasks.

- Default Value: [EMPTY]

System Notification Message

Specify a message that will be shown for all users when they open ActivityTimeline.

- Default Value: [EMPTY]

11.Help Portal

You can access the latest version of the Administrator and User Guides, FAQ and other documentation at our online portal at:

https://activitytimeline.atlassian.net/wiki/spaces/AC

You can request an assistance from our support team via email (support@reliex.com), live chat or from your personal Customer Success Manager depending on support package you're currently on.