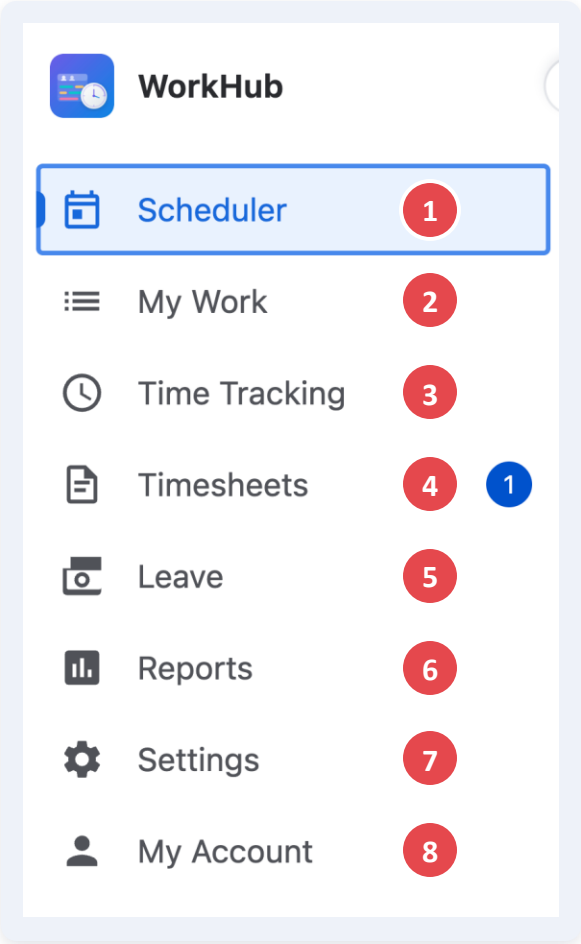
WorkHub for Jira: Manager's guide

How to plan work, balance workload, and approve time and leave for your team



OVERVIEW

Find your way around WorkHub



1 **Scheduler**
Plan Jira issues on a timeline, one row per person.

2 **My Work**
Your own schedule and logged hours.

3 **Time Tracking**
Log time in a weekly grid and submit your timesheet.

4 **Timesheets**
Logged hours by person or project, and approvals.

5 **Leave**
Request time off and decide on requests.

6 **Reports**
Utilization, worklogs, leave, planned vs actual.

7 **Settings**
Admin setup: teams, capacity, holidays, permissions.

8 **My Account**
Your own roles and access.

Open it: from the Apps menu in Jira. WorkHub reopens the page you used last.

OVERVIEW

Six things you will do in WorkHub

The six jobs a manager does, and the page for each.

Plan work

Scheduler

Put Jira issues on a timeline, one row per person

Balance workload

Scheduler

See who is overbooked or free, day by day

Review logged time

Time Tracking

Open a team member's week and log on their behalf

View and approve

Timesheets

See logged hours by person or project, and accept or reject submitted periods

Approve leave

Leave

Decide on time-off requests

Report

Reports

Utilization, worklogs, leave, planned vs actual

Approval is optional: an admin can turn it off for leave and for timesheets. Leave is then approved as soon as it is created, and timesheets are not submitted.

OVERVIEW

Your role decides whose data you see

Everyone starts as a Regular user. An App Admin grants extra roles in Settings > Permissions; My Account shows yours.

Role	Sees	Can do
Regular user (default)	Teammates on the Scheduler; only their own timesheets	Plan shared work with teammates, log their own time, request their own leave
Team Manager	Members of the teams they manage	Plan their work, log time for them, approve their leave and timesheets
Org Manager	Everyone	Plan, edit and approve for everyone; no access to settings
Org Viewer	Everyone	View only for other people: schedules, timesheets, leave, reports
Approver or Viewer rule	Only the person, team or everyone the rule names	Approver: approve their leave and timesheets. Viewer: view only
App Admin	Everyone	Everything, including all settings

Jira permissions still apply: a WorkHub role never opens a Jira project you cannot access. Even an App Admin or Org Manager sees only the issues and logged hours of projects they can open in Jira.

Read the Scheduler at a glance

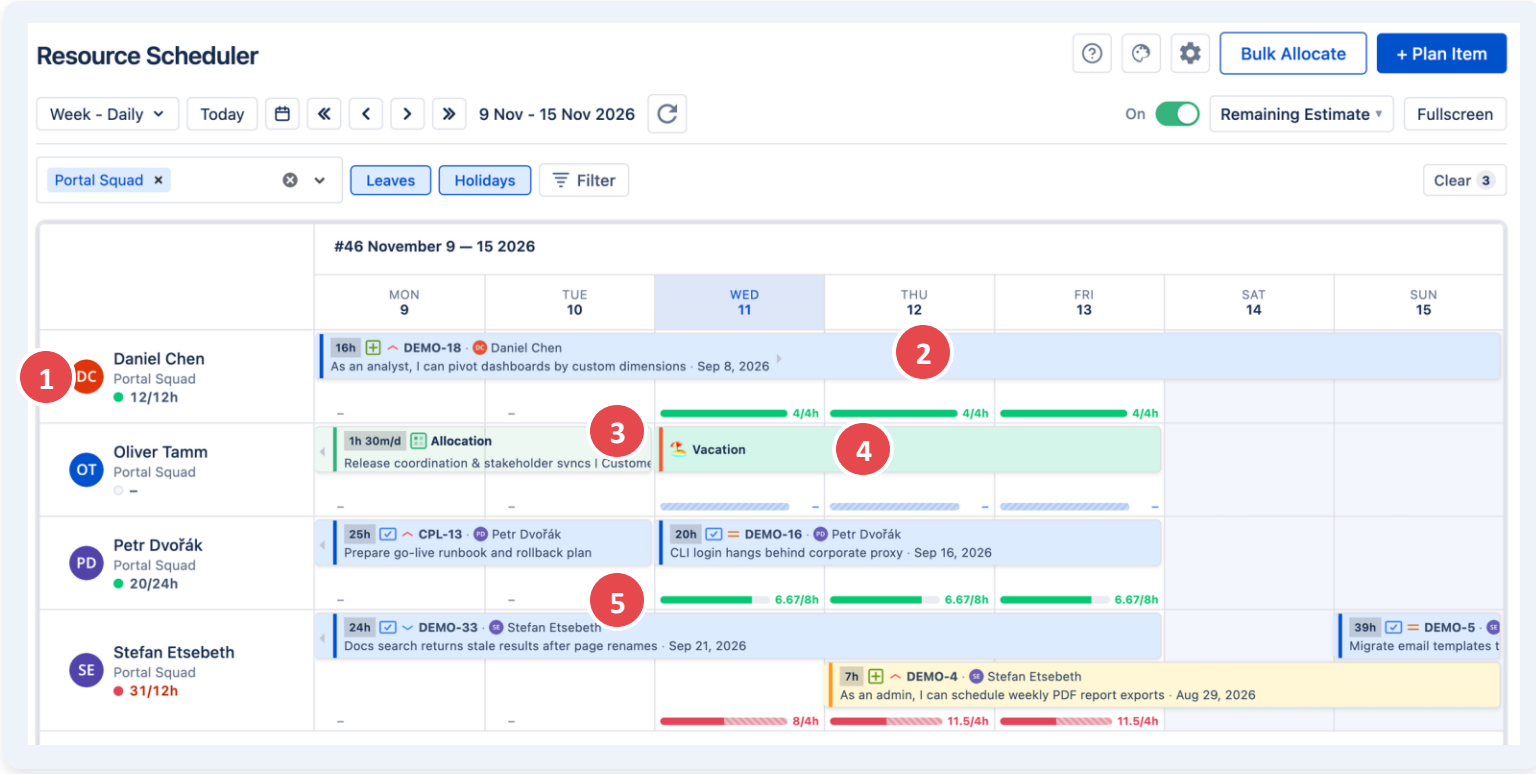
1. **Rows**
   one per person, with team and total workload / capacity

2. **Issue bars**
   run from start date to end date, with an hours badge

3. **Allocations**
   time booked for non-issue work, in hours per day

4. **Leave and holidays**
   shown on the row, and they reduce capacity

5. **Workload bar**
   under every day: scheduled hours against available hours



Empty timeline? Pick a team or people in the toolbar first, then the time span (Week, Month, Custom range).

Drag issues in from the Plan Issues panel

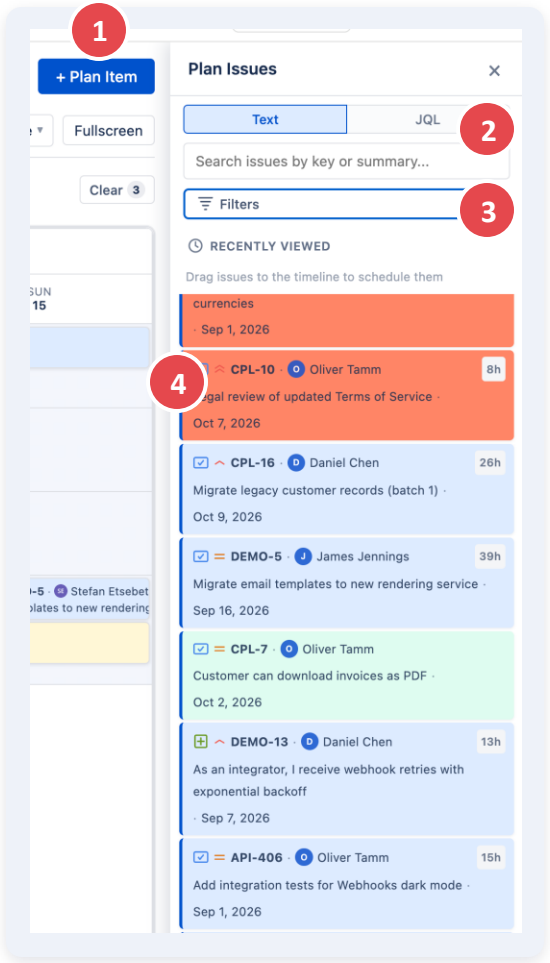
1. **Click + Plan Item**
   The Plan Issues panel opens on the right of the Scheduler.

2. **Find the issue**
   In Text mode, search by key or summary. Switch to JQL for a precise query.

3. **Narrow the list**
   Open Filters to cut the list down. Before you search, the panel shows Recently viewed issues.

4. **Drag the card onto a row**
   Drop it on the person and the day the work should start.

5. **Check the bar**
   It is sized from the issue's estimate over that person's working days. No estimate means one day.



Good to know: the drop is saved to Jira immediately. Close the panel with the X.

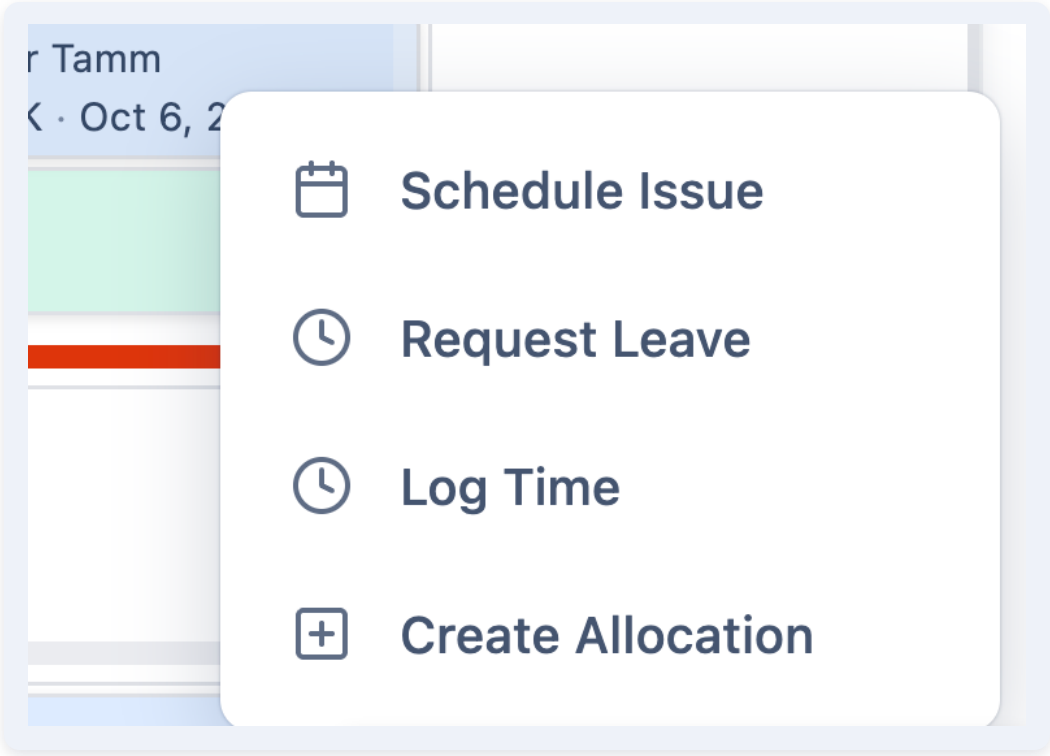
Schedule, move and resize issues

1. **Schedule from a day cell**
   Click an empty cell, or right-click a row, and choose Schedule Issue.

2. **Move it**
   Drag sideways for new dates, or to another row to reassign.

3. **Resize it**
   Drag an edge to make the issue longer or shorter.

4. **Edit or remove it**
   Click the bar: Edit changes dates, estimates and assignee; Actions > Unschedule takes it off the timeline.



What changes in Jira: the assignee, and the start and end dates in the fields your admin mapped. Saved immediately.

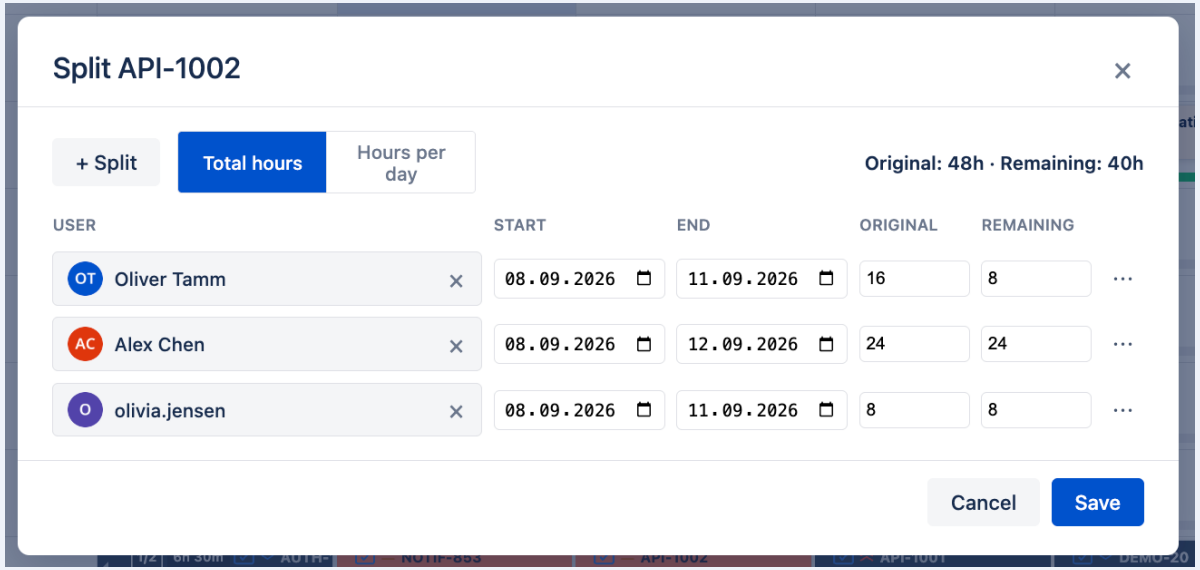
Share one issue between several people

1. **Click the issue bar, then Split**
   The Split dialog opens for that issue.

2. **Add a part per person**
   Give each person their own dates and hours, as Total hours or Hours per day.

3. **Save**
   Each part becomes its own bar with a badge such as 1/2.

4. **Work with a part**
   Drag, resize or log work on it like a normal issue. Only that part changes.



Once split: later changes to the issue in Jira do not update its parts.

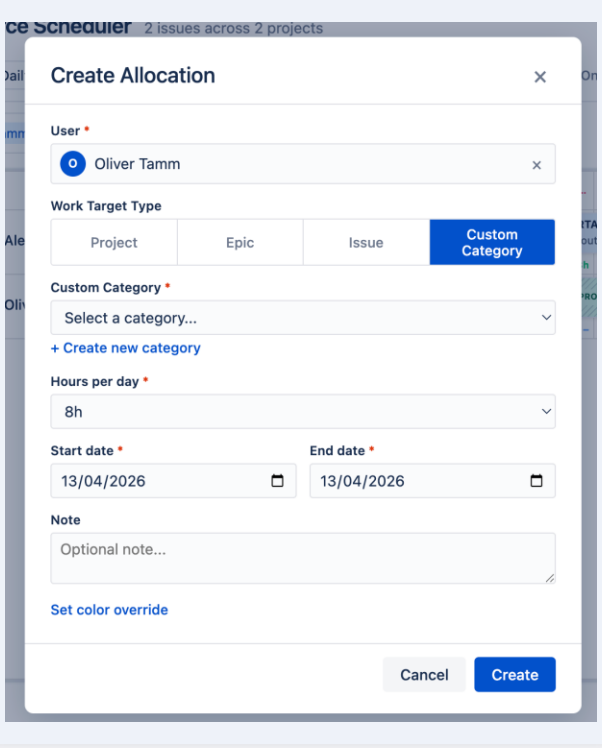
Book non-issue work with allocations

1. **Right-click a day cell**
   On the person's row, choose Create Allocation.

2. **Say what it is for**
   Pick Project, Epic, Issue or Custom Category, then hours per day and dates.

3. **Many people at once**
   Click Bulk Allocate in the Scheduler header, add people, set it once.

4. **Recurring work**
   Tick Repeat in either dialog, for example for a weekly meeting.





On the timeline
The bar shows the hours per day and what it is for. The workload bar below counts it: here 1.5 of 8 hours.

Good to know: allocations count toward workload like issues.

Read the workload colors

Under 50%

Plenty of free time

50–79%

Room for more

80–100%

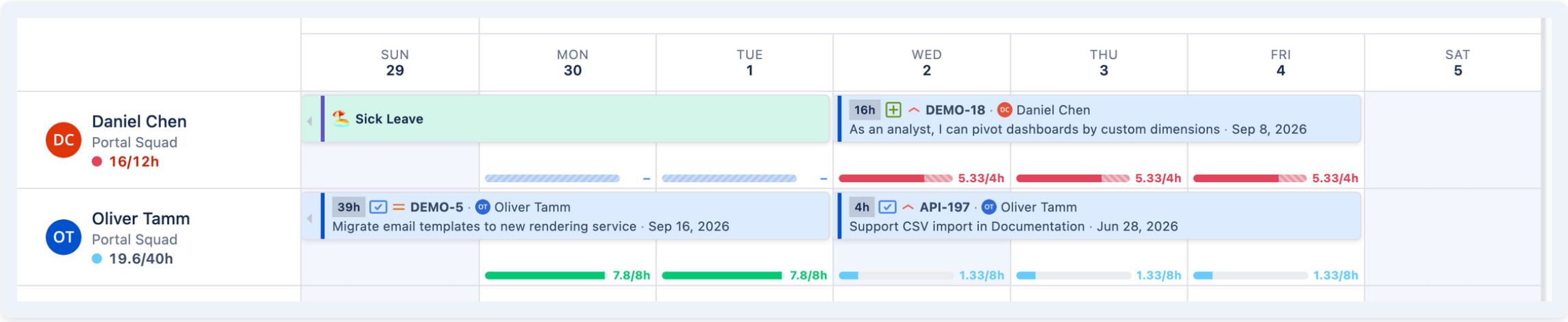
Healthy target

101–120%

Slightly overbooked

Over 120%

Needs action



Also on the bar: blue stripes mark approved leave, deep orange a public holiday, and red with a warning sign means work is scheduled on a leave or holiday day.

BALANCE WORKLOAD

Know where available hours come from

Capacity scheme
working hours for each day of the week

–

Holidays
public holidays and company days off

–

Approved leave
full days, or only the hours taken

Example: 8h scheme, 2h approved leave, 6h available

6h scheduled — **100%, fully loaded**

8h scheduled — **133%, overbooked**

Who sets these up

- App Admins create capacity schemes and holiday calendars in Settings
- Team Managers can assign them to the teams they manage
- Everyone can see their own in My Account

Remember: issues without an estimate add no workload, so keep estimates up to date in Jira.

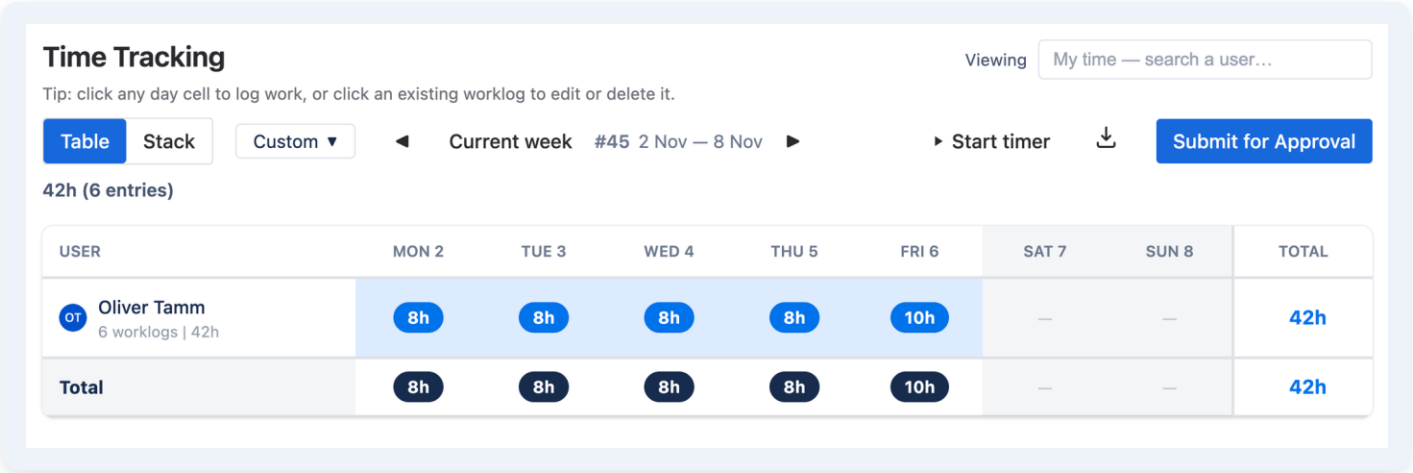
Track time in the weekly grid

1 **Open Time Tracking**
One row per issue or allocation, one column per day, with totals.

2 **Log work**
Click a day cell, pick the issue, enter Time Spent and, if your site uses them, a Category such as Billable. Then click Submit.

3 **Change the period**
Use the arrows or pick Current Week, Last Week, Current Month or Custom.

4 **Export**
The export icon downloads the period as an Excel file.



With timesheet approval on: Submit for Approval sends the whole period to the approver.

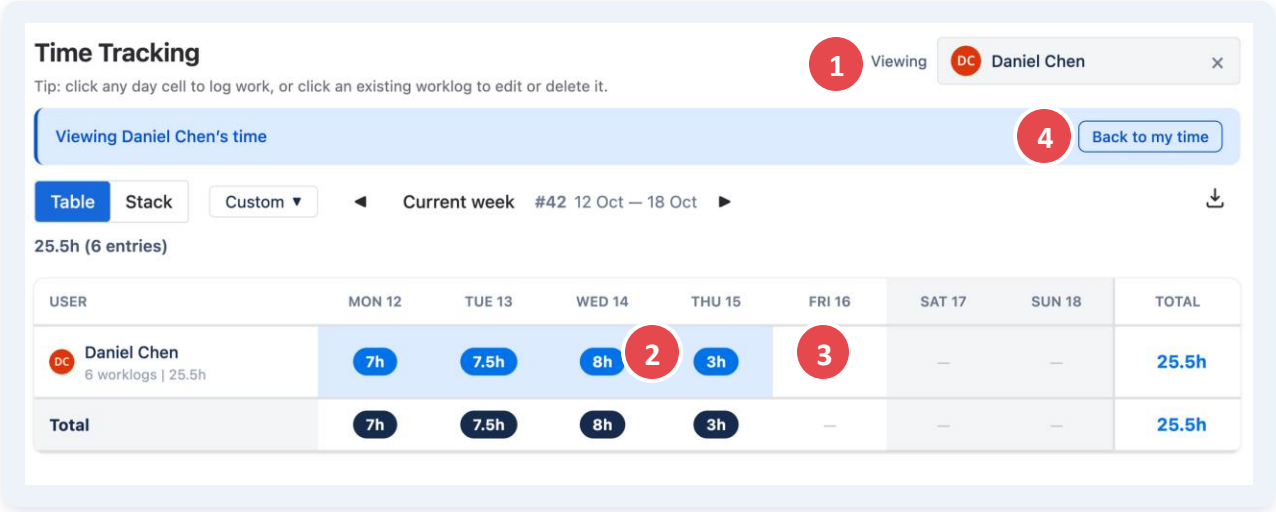
Review and log time for your team

1. **Pick a person under Viewing**
   Top right of Time Tracking. Type a name; their week opens as they see it.

2. **Review their worklogs**
   Click a cell with hours to see what was logged that day.

3. **Log on their behalf**
   Click a day cell to add, edit or delete work. Jira records the team member as the author.

4. **Return to your own week**
   Click Back to my time.



Can view and log
App Admin, Org Manager, Team Manager, approver rule

Can view only
Org Viewer and viewer rule

Admin switch: logging for others can be turned off in Settings > Timesheet Settings. Other people's weeks are then view-only.

Point your team to My Work

1. **Logged hours chart**
   One bar per day: hours logged against the time the person had available.

2. **My schedule**
   Their own Scheduler row: issues, allocations, leave and holidays.

3. **Act from the page**
   Click a day to see its worklogs and log time; right-click to schedule an issue or request leave.



Personal: My Work only ever shows the person who opened it. To plan for the team, use the Scheduler.

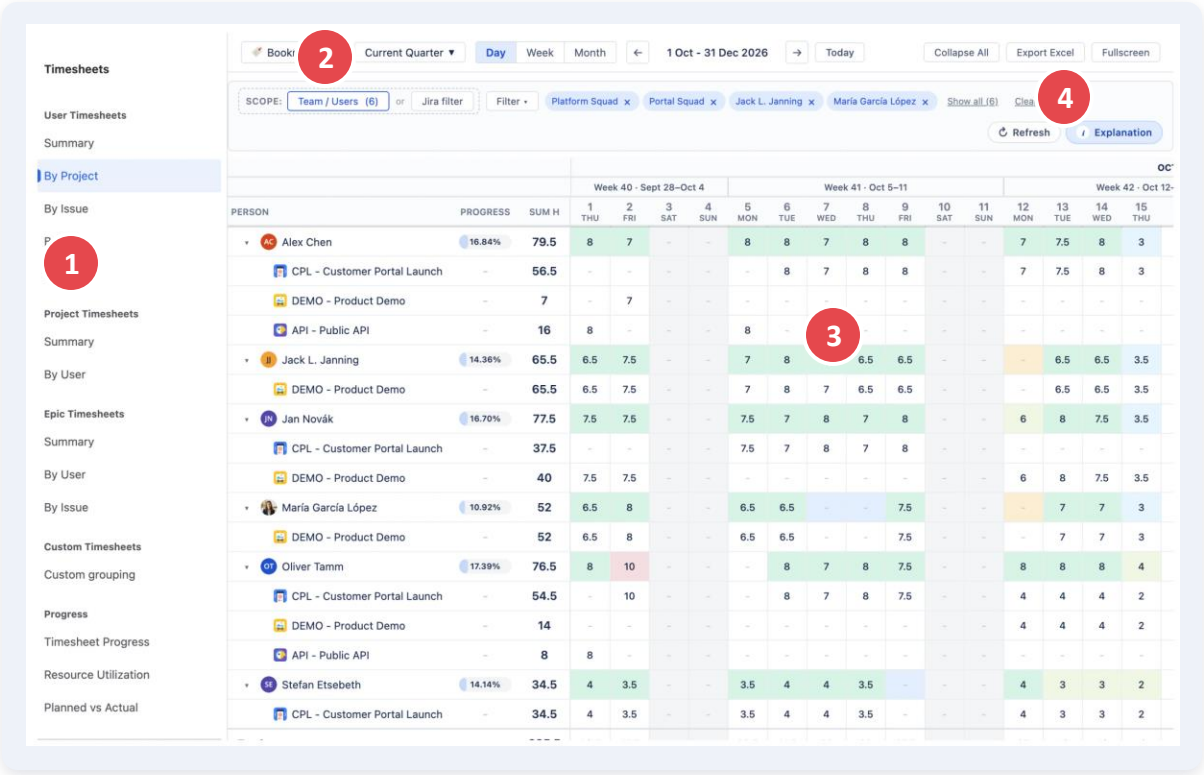
See logged hours in Timesheets

1 Pick a view
User, Project or Epic timesheets in the left sidebar, as a summary or grouped.

2 Set scope and period
Choose Team / Users or a Jira filter, the period, and Day, Week or Month columns.

3 Read the colors
Cells compare logged hours with capacity: green is on track, red is over 120%.

4 Drill in and export
Click a cell to see the worklogs behind it. Export Excel downloads the view.



Bookmarks: save the current view and filters to reopen later. They are personal.

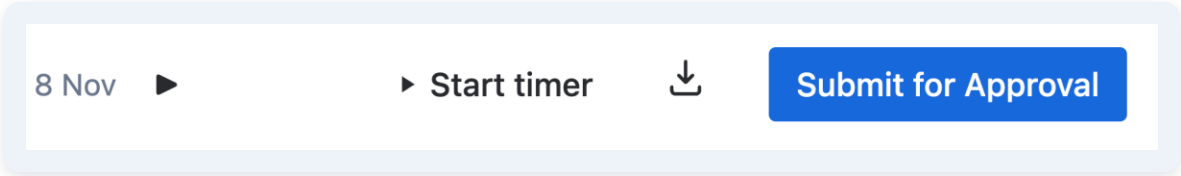
Submit a timesheet for approval

1. **Open Time Tracking**
   Go to the period you want to submit.

2. **Check the worklogs**
   Make sure the hours for the period are complete.

3. **Click Submit for Approval**
   A confirmation shows the period, the hours and who will review it. Add a note if needed.

4. **Confirm**
   The timesheet goes to the approver and its status becomes Submitted.



Good to know

- Submitted too early? Withdraw submission takes it back to Draft
- An empty period can be submitted, but then the note is required
- Nobody to approve it? Then it cannot be submitted; ask an admin

Approval is optional: an admin can switch the approval workflow off in Timesheet Settings. Then nobody submits timesheets and there is nothing to approve; logging hours in Time Tracking works as usual.

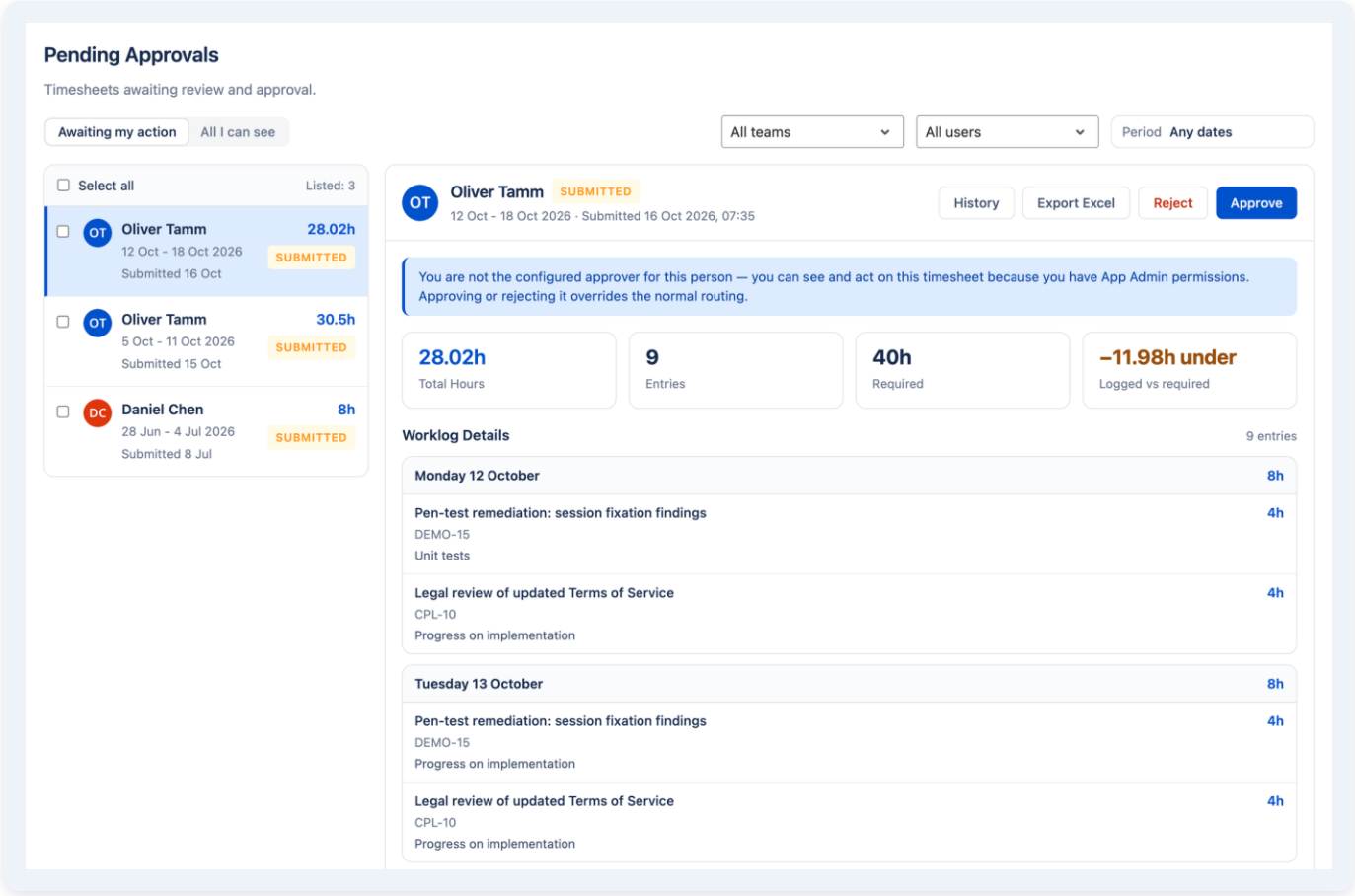
Approve or reject timesheets

1. **Open Pending Approvals**
   In Timesheets, under Approvals. Awaiting my action lists what is waiting for you.

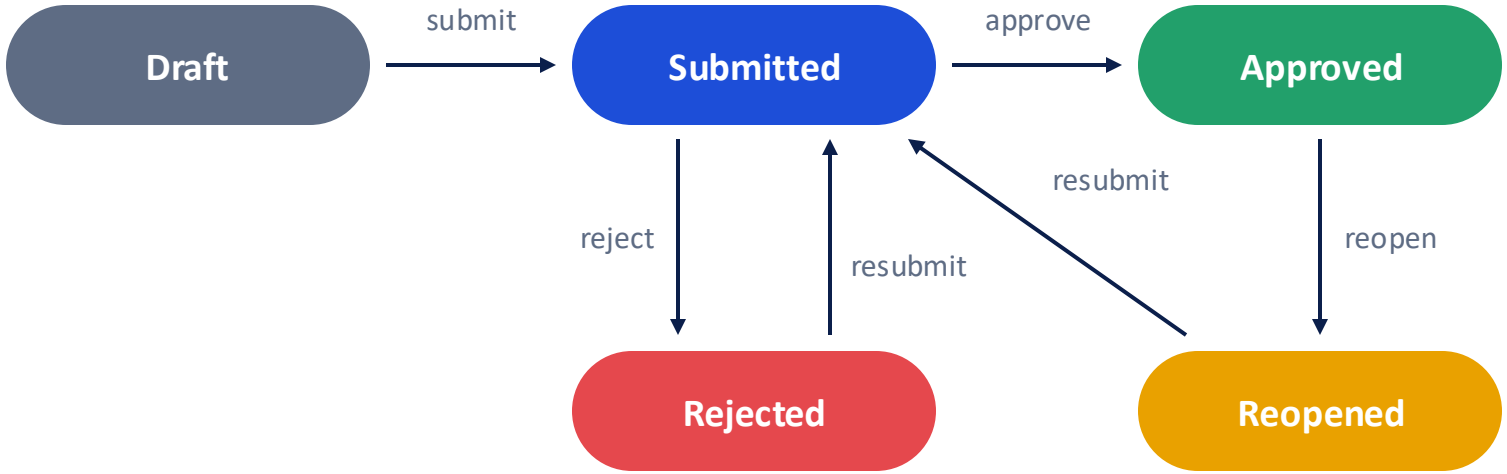
2. **Check the period**
   Review hours, worklogs and the person's note against the hours required.

3. **Approve or Reject**
   A rejection needs a reason of at least 10 characters.

4. **Approve in bulk**
   Tick several timesheets and approve them in one step.



Follow a timesheet through its statuses



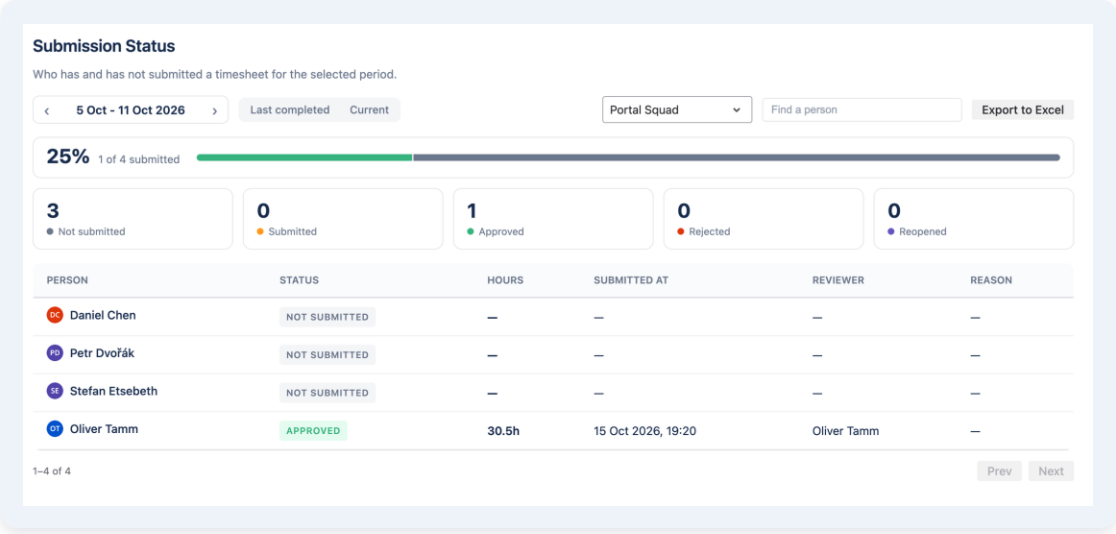
While it is Submitted, the owner can still withdraw it back to Draft.

Who approves: the team manager, someone with an approver rule, or any App Admin or Org Manager. Whoever acts first decides.

- **Draft**
  not submitted yet, or withdrawn by its owner
- **Submitted**
  waiting for an approver
- **Approved**
  accepted by an approver
- **Rejected**
  sent back with a reason
- **Reopened**
  approved, then opened again for corrections

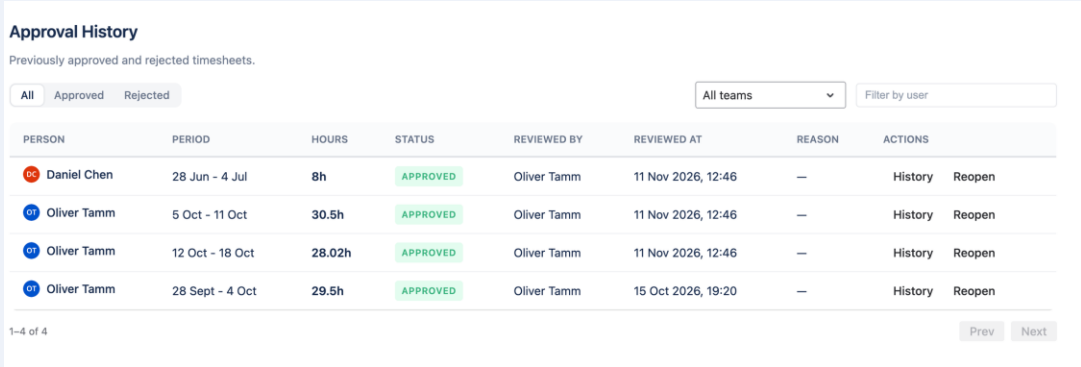
Chase submissions and revisit decisions

Submission Status



See who has and has not submitted for a period. Narrow by team, find a person, and export to Excel.

Approval History

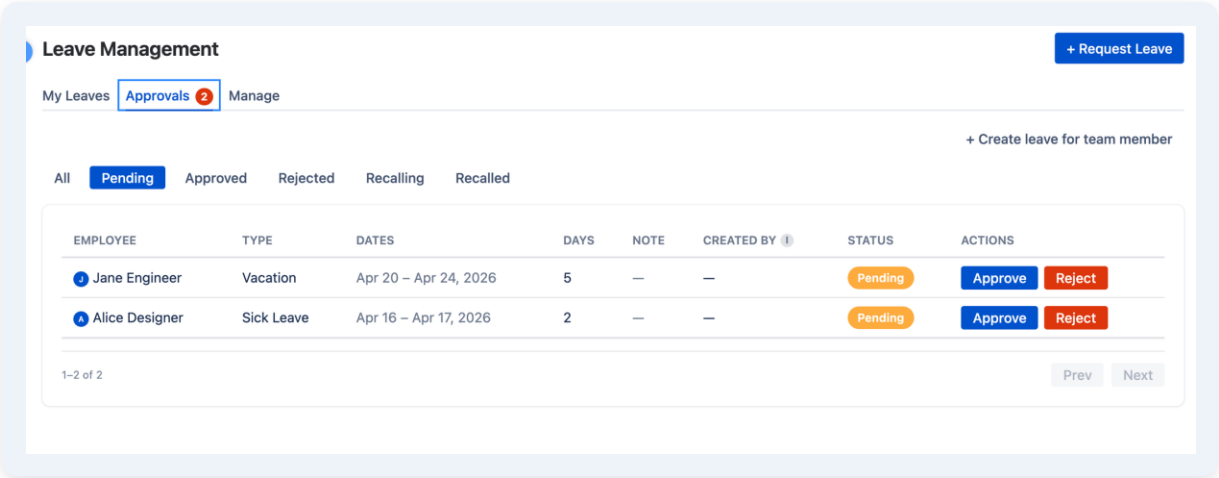


Past decisions with reviewer and time. Reopen lets the owner correct an approved timesheet.

Late edits: a timesheet is marked Changed since submission when its worklogs change afterwards.

Decide on leave requests

Request status	What you can do
Pending	Edit, Approve or Reject
Approved	Revoke, which cancels the leave
Recalling	The owner asked to cancel it: Approve Recall or Deny Recall



Where: Leave, then the Approvals tab, or click the leave bar on the Scheduler.

Approval is optional: an admin can switch leave approval off in Leave Settings. Then every request, from a person or a manager, is approved the moment it is created, the Approvals tab is hidden, and people can edit or recall their own leave.

Record leave for someone and see who is away

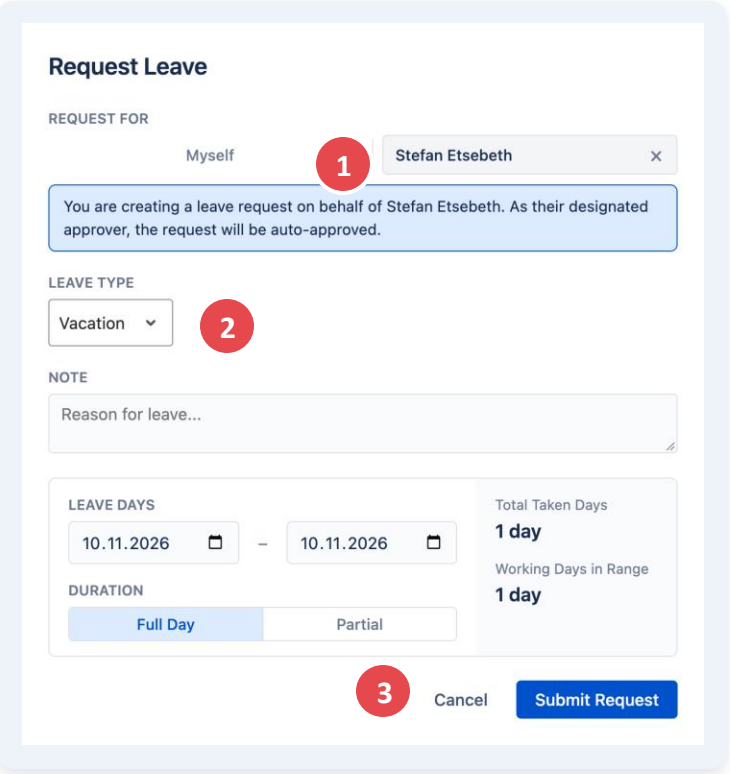
1. **Open Leave, then the Approvals tab**
   Click Create leave for team member and pick the person in Request for.

2. **Fill in the request**
   Leave Type, the Leave Days range, and Full Day or Partial where the type allows it.

3. **Submit**
   Created by their approver, the leave is approved straight away.

4. **See who is away**
   Leave shows as a bar on each person's Scheduler row, and approved leave lowers their available hours.

5. **Get the overview**
   In Reports, run the Time-Off & Absence Summary for days away per person and leave type.



Note: only approved leave reduces capacity.

REPORTS

Pick the report that answers your question

Open Reports, click a card, set Period, Scope and Group by, then click Create.

Who is overbooked, who has room?

Resource Utilization Forecast

How is effort spread across projects?

Project Resources Overview

Who is away, and when?

Time-Off & Absence Summary

Who logged what, when?

Work Log Audit Trail

Are our estimates holding?

Planned vs Actual

Need it again next month?

Bookmark it, or Export Excel

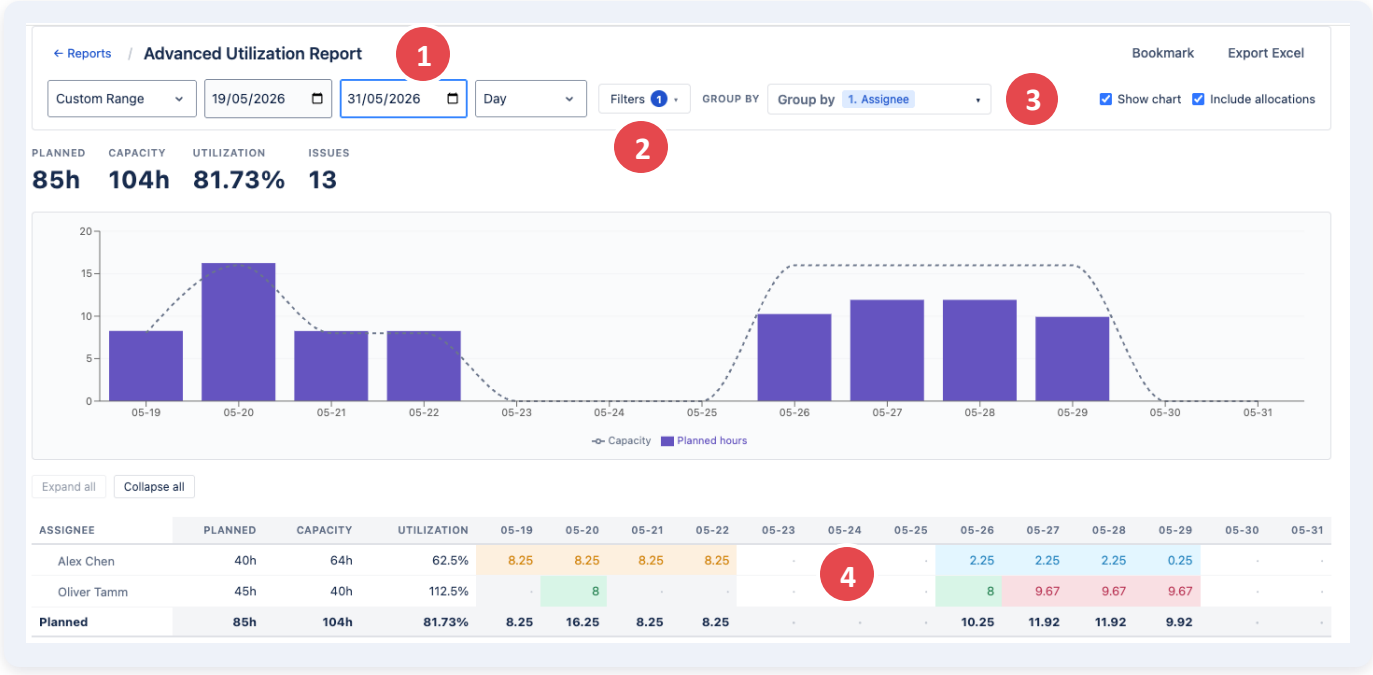
Run the Advanced Utilization Report

1. **Open Reports, click the starred card**
   Advanced Utilization Report opens straight away; all settings are in its header.

2. **Filter**
   Set the period and scale, then a Jira filter, teams, people or projects. Click Apply.

3. **Group by**
   Up to six levels, for example Project, Assignee, Epic. Drag to reorder.

4. **Read the result**
   With Assignee first, each person gets Capacity and Utilization, colored like the Scheduler workload.



Keep it: Bookmark saves the setup; Export Excel downloads the result.

Where to get help

Four places to look when you are stuck



Guided tour
Click Getting started in the Scheduler header



Your App Admin
For teams, capacity schemes, holidays and permissions



Documentation
reinwok.com/docs/jira-workhub



Reinwok support
support@reinwok.com

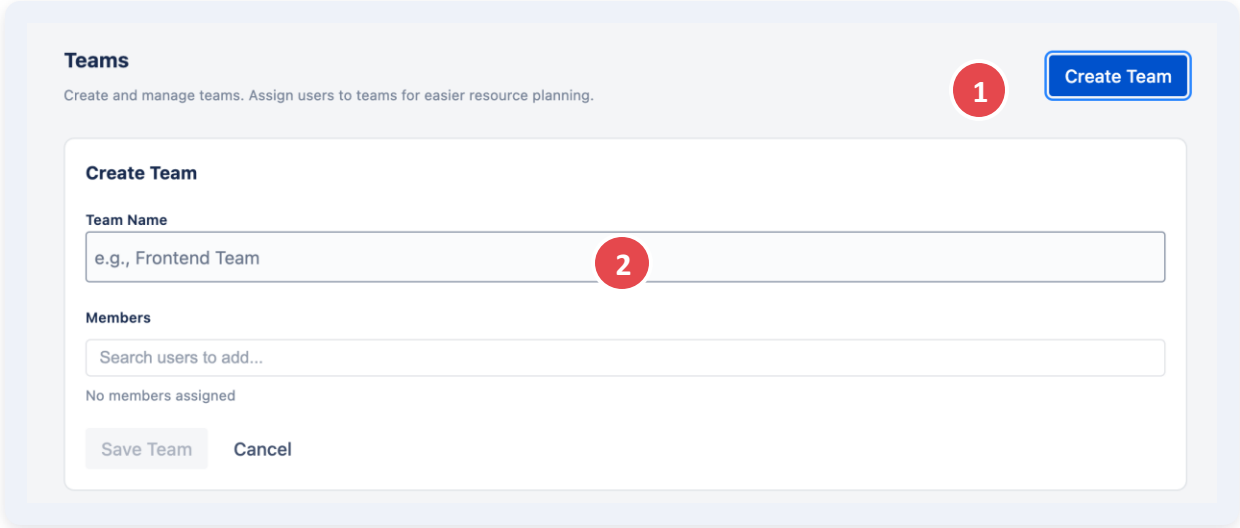
Create teams and name their managers

1. **Open Settings, then Teams**
   Click Create Team. Only App Admins can create and change teams.

2. **Name it and add members**
   Type a name and tick the people to add, then Save Team.

3. **Name the manager**
   In Settings > Permissions, make someone Team Manager of that team.

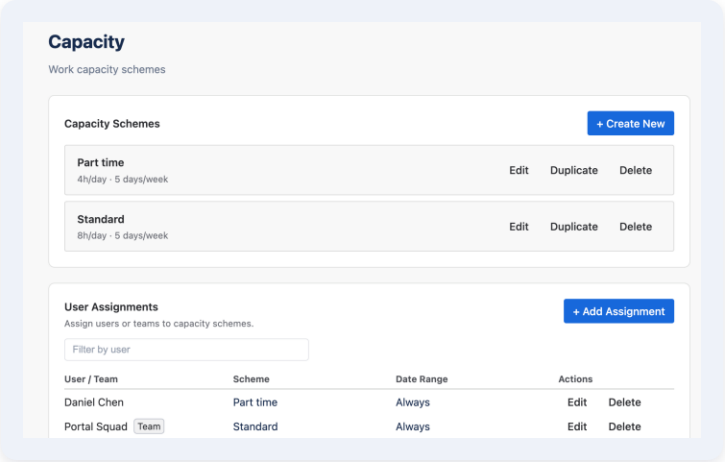
4. **Use it everywhere**
   The team now appears as a filter on the Scheduler, in Timesheets and in Reports.



Good to know: a person can be in several teams.

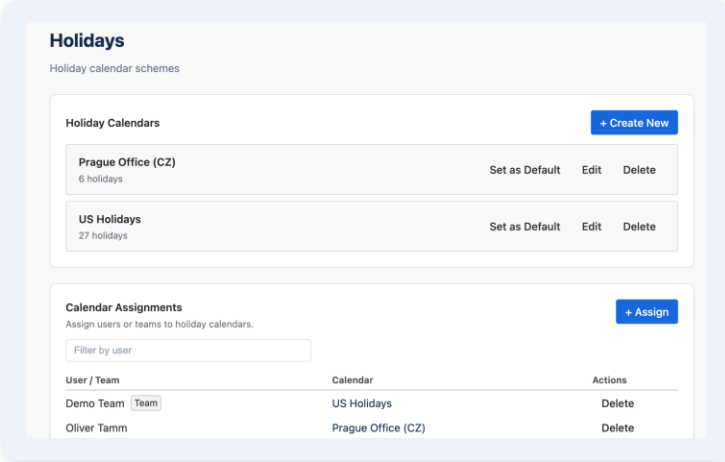
Set up capacity schemes and holiday calendars

Capacity schemes Settings, then Capacity



- Create New sets the working hours for each weekday, such as Part time at 4h a day
- Add Assignment gives a scheme to users or teams; a person's own scheme wins over the team's

Holiday calendars Settings, then Holidays

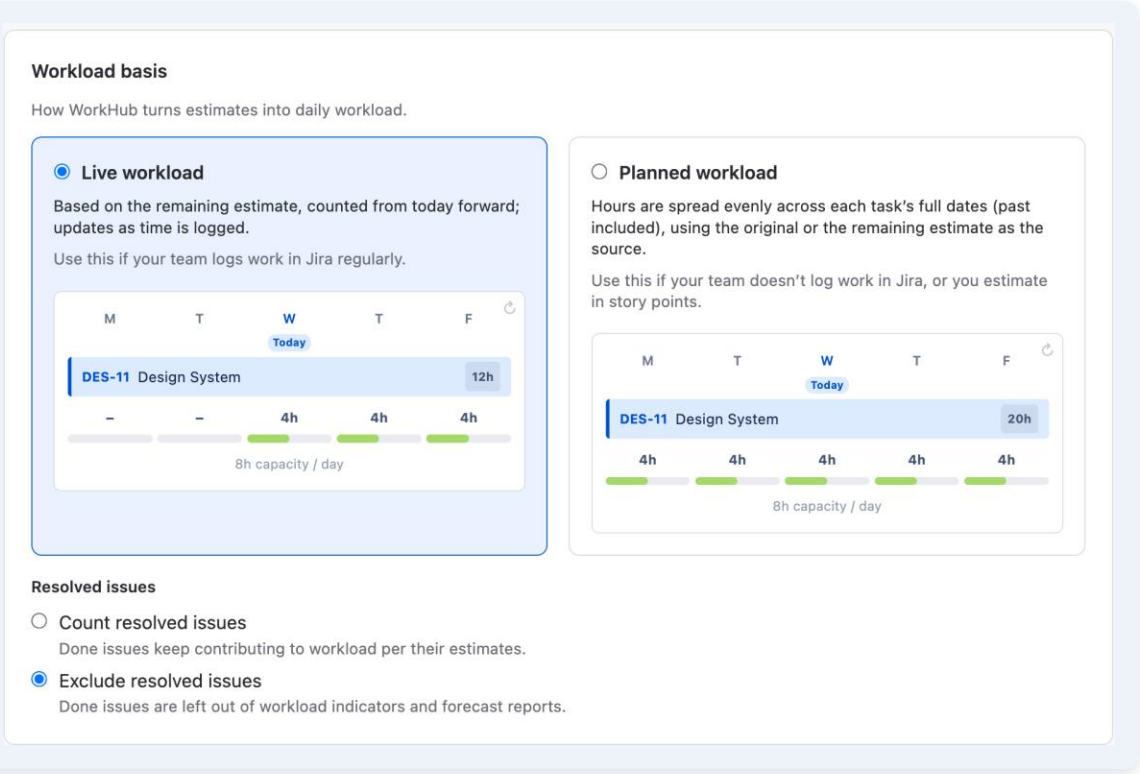


- Create New makes one calendar per country or office; public holidays can be imported by country
- Assign links users or teams to a calendar; Set as Default covers everyone else

Who can do this: App Admins create them; Team Managers can assign them to the teams they manage.

Know which workload basis your site uses

Set once for the whole site by your App Admin, in Settings, General.



Live workload

Remaining work, from today on. Use it when the team logs work in Jira regularly.

Planned workload

The estimate spread over all the issue dates. Use it when the team rarely logs work, or estimates in story points.

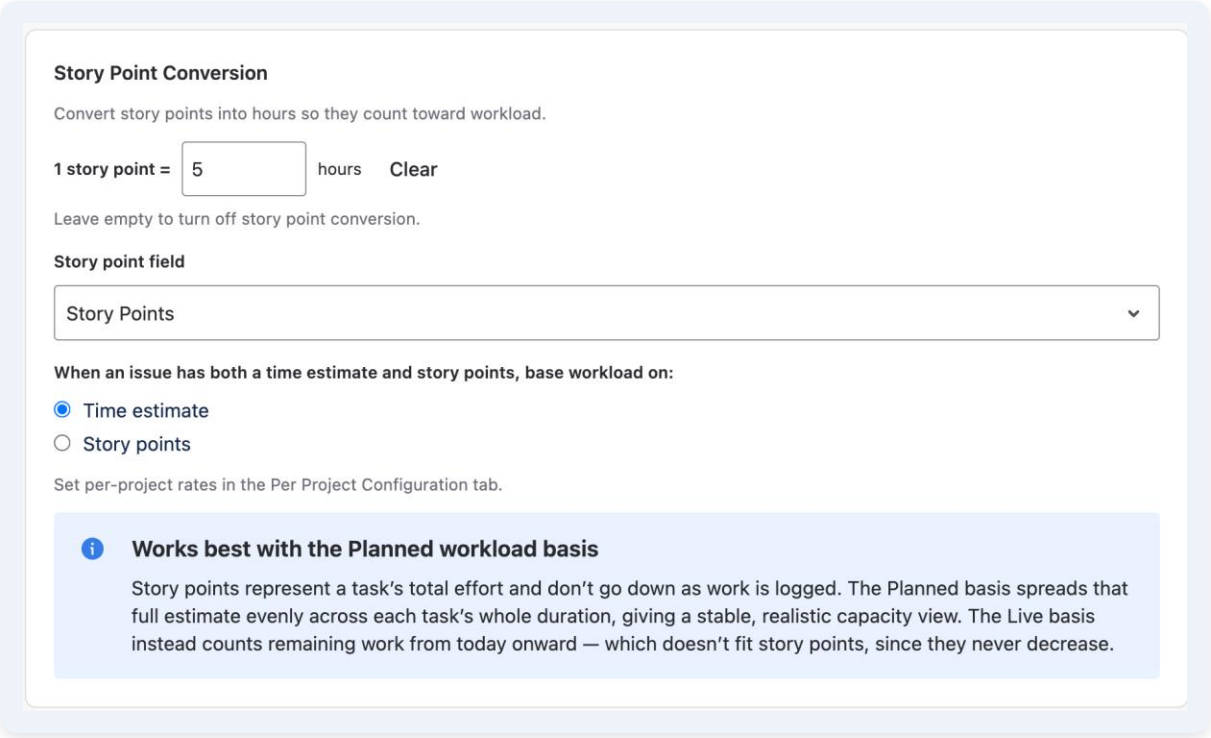
Your own view, in Choose Workload Mode

- With Live: Remaining Estimate, Availability or Original Estimate
- With Planned: Workload or Availability

Example: a 20h issue runs Monday to Friday and 12h is left on Wednesday. Live shows 4h a day from Wednesday; Planned shows 4h on all five days.

How story points become hours

Set by your App Admin, in Settings, General. What it means for your plan:



1. **One rate for the site**
   Your admin decides how many hours one story point is worth. Projects can have their own rate.

2. **One rule for double estimates**
   When an issue has both a time estimate and points, the admin setting decides which counts.

3. **Best with the Planned basis**
   Points never go down as work is logged, so Planned gives a stable view.

Example: at 1 story point = 5 hours, an 8-point story planned over five working days adds 8h a day.