JaWork

Admin Guide

For the people who set JaWork up: members and roles, the work calendar, projects and their fields, automations, imports, AI agents, reports, billing and AI assistants.

Edition of 24 November 2026 · jawork.app/help

Contents

Your organization

Members — who uses JaWork 3
Roles — in the organization, in projects and for costs 6
Work calendar — working days, hours and holidays 8

Projects

Create a project 10
Statuses, issue types and custom fields 12
The project profile — details, members, documents and notifications 14

Automation

Automation rules 16

Importing

Import from Jira 18
Import issues from Excel 20

AI agents

An AI agent on a board column 22
AI credits 24

Dashboards and reports

Build dashboards and custom reports 26
Report templates — PDF, Word and Excel 28

Billing

Plans, seats and invoices 30

AI assistants and security

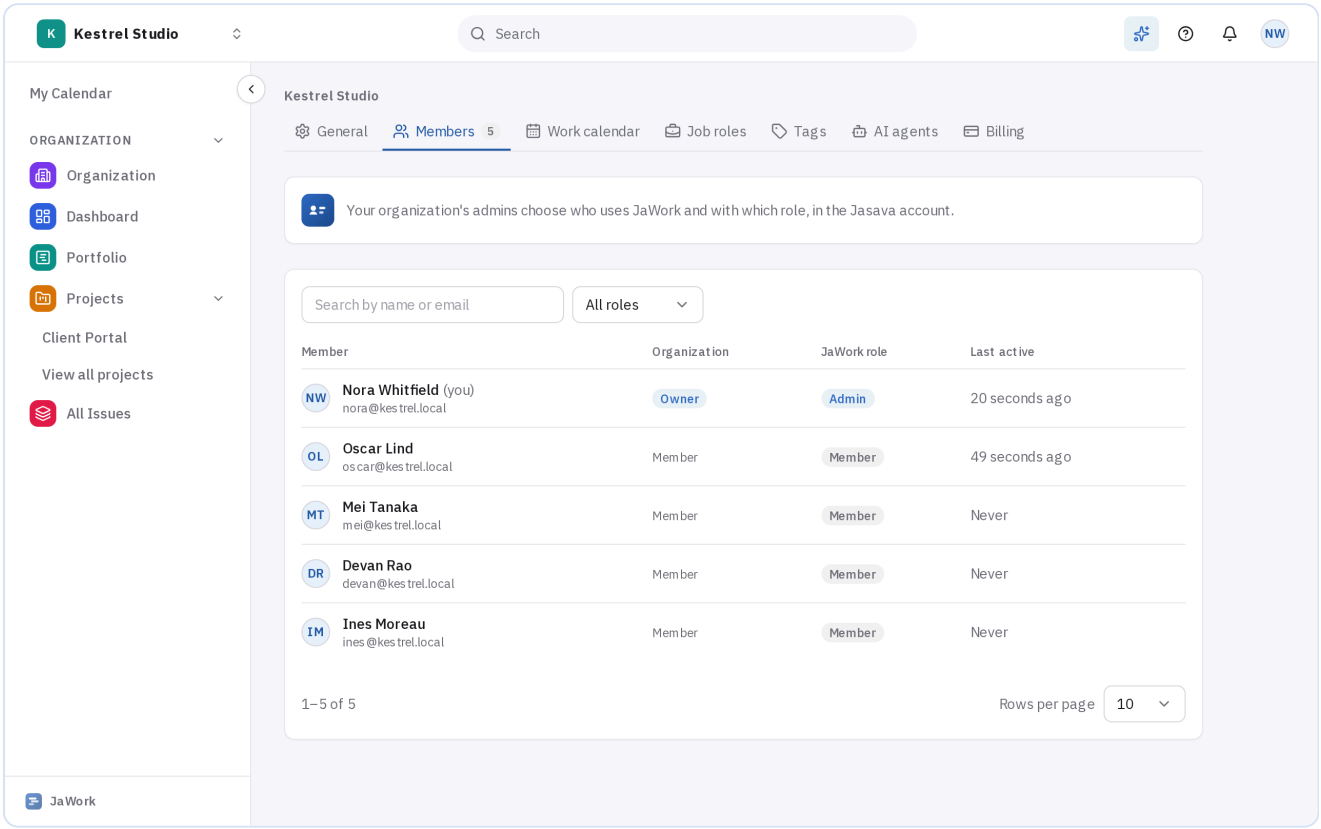
Connect AI assistants (MCP) 32

YOUR ORGANIZATION

Members — who uses JaWork

See everyone who uses JaWork on the Members tab. Admins invite people and change their role, apps or access from there; each action opens the Jasava account in a new tab.

JaWork signs people in with their **Jasava account**. Your organization lives there too, with every member and the apps each one uses. Your organization's owner and admins manage people from JaWork's **Members** tab: every action opens the Jasava account in a new tab, at that person.



See who uses JaWork

1. Click **Organization** in the menu on the left.
2. Open the **Members** tab. The number beside it counts the people who use JaWork.

Each row shows a person's name and email, their role in the **Organization** (**Owner**, **Admin** or **Member**), their **JaWork role** (**Admin** or **Member**) and when they were **Last active**. Search by name or email, or choose a role in **All roles**.

For admins, a line at the top says: "People and their apps live in your Jasava account — a change here applies to every Jasava app."

Find where to manage members

- Click your photo or initials at the top right and choose **Organization members**.
- Or type “members” or “invite” in the **Search** box in the header (on a computer). **Organization members** is the first result.

Both open **Organization** › **Members**. Only the organization’s owner and admins see them.

Invite people

1. On the **Members** tab, click **Invite people** at the top right.
2. The Jasava account opens in a new tab, on Invite, with JaWork already chosen.
3. Enter their email there and send the invitation.

The person gets an email. Once they accept, they appear on JaWork’s Members tab.

Change or remove someone

Click ··· at the end of a person’s row and choose:

- **Change role in JaWork** — Admin or Member.
- **Change apps** — which Jasava apps they use.
- **Remove JaWork access** — they keep their other apps. If JaWork is their only app, the account offers to remove them from the organization instead.
- **Remove from organization** — from every Jasava app, straight away.
- **Open in Jasava account** — their page in the account.

Each one opens the Jasava account in a new tab, at that person. Nothing changes until you confirm there. Press **Done — close this tab** when you have finished; back in JaWork, the Members list updates by itself.

The owner’s row offers only **Open in Jasava account**.

People who aren’t admins see the list only, with no **Invite people** and no ···.

What the two roles can do

- A **Member** works in the projects they belong to.
- An **Admin** also manages the organization in JaWork: its members, work calendar, job roles, tags, AI agents and billing. The owner is always an admin.

> **Tip:** A pending invitation already holds a seat on your plan, so cancel invitations nobody will accept.

Read more about roles in projects and plans and seats.

Online: jawork.app/help/admin/organization/members

Roles — in the organization, in projects and for costs

What an organization admin, a project admin, a member and a viewer can do, who may edit issues, and the job roles that price each person's time.

JaWork has three kinds of role. Each answers a different question.

1. The JaWork role — what someone can do in the organization

Every person who uses JaWork is an **Admin** or a **Member**, chosen in the Jasava account. Admins manage the organization: its work calendar, job roles, tags, AI agents and billing. See Members.

2. The project role — what someone can do in a project

Each project has its own members, on the project's **Profile** › **Members** tab. A project member is one of:

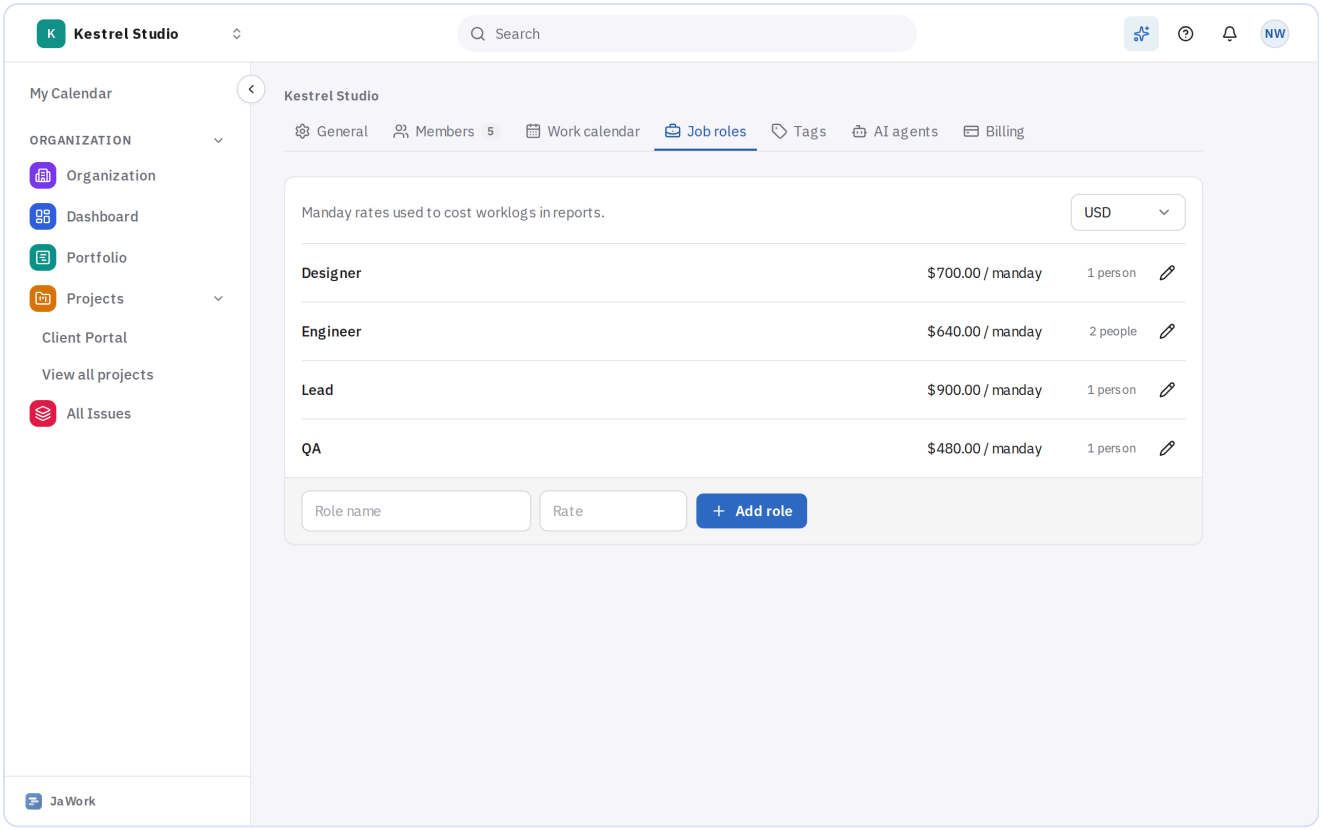
- **Admin** (a project admin) — manages the project: its columns, settings, members and automations. The project's owner is always a project admin.
- **Member** — creates and works on issues.
- **Viewer** — reads the project and changes nothing.

Who may edit existing issues is a project setting: on **Profile** › **Configuration**, under **Issue editing**, tick **Project admins**, **Members**, **Viewers** and **Organization admins without project membership** as you need. Organization admins can always see every project.

3. Job roles — what someone's time costs

Job roles, such as Designer or Engineer, price a person's time for reports on cost.

1. Click **Organization** and open the **Job roles** tab.
2. Choose the currency at the top right.
3. Type a **Role name** and its **Rate** for one person-day ("manday"), and click **Add role**.
4. Click the pencil on a role to change its name or rate.



Each role shows how many people have it. A person's job role is chosen in each project, on the project's **Profile** › **Members** tab, in the **Job role** column. The dashboard's **Resource Cost** uses these rates.

> **Tip:** Change a rate when your prices change: reports from then on use the new rate.

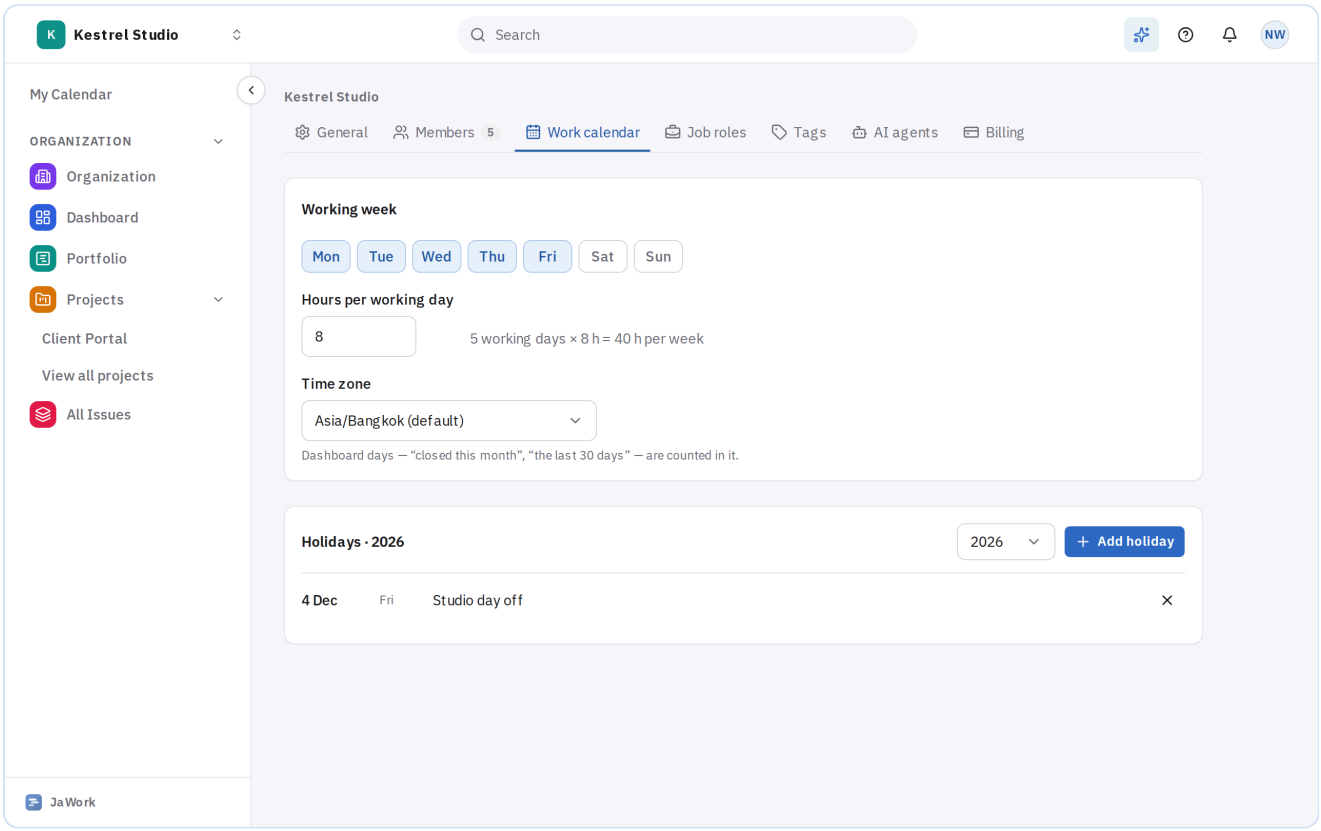
The hours in a working day come from the work calendar.

Online: jawork.app/help/admin/organization/roles

Work calendar — working days, hours and holidays

Set your organization's working week, the hours in a working day, its time zone and its holidays — JaWork counts sprint capacity, schedules and reports from them.

The work calendar tells JaWork when your team works. Sprint capacity, the working days left in a sprint, due-date counts and cost reports all use it.



Set the working week

1. Click **Organization** and open the **Work calendar** tab.
2. Under **Working week**, click the days your team works. Chosen days are blue.
3. Type the **Hours per working day**. JaWork shows the week's total beside it, for example "5 working days × 8 h = 40 h per week".
4. Choose your **Time zone**. Dashboard days, such as "closed this month", are counted in it.

Add holidays

1. Under **Holidays**, choose the year.
2. Click **Add holiday**, pick the date and give it a name, such as "Studio day off".

A holiday is left out of working days everywhere: a sprint across it has a day less, and the Gantt chart shades it. Click the **×** at the end of a row to remove a holiday.

> **Tip:** Add next year’s holidays before the year starts, so sprints planned across New Year count correctly.

Costs per person come from job roles and their rates.

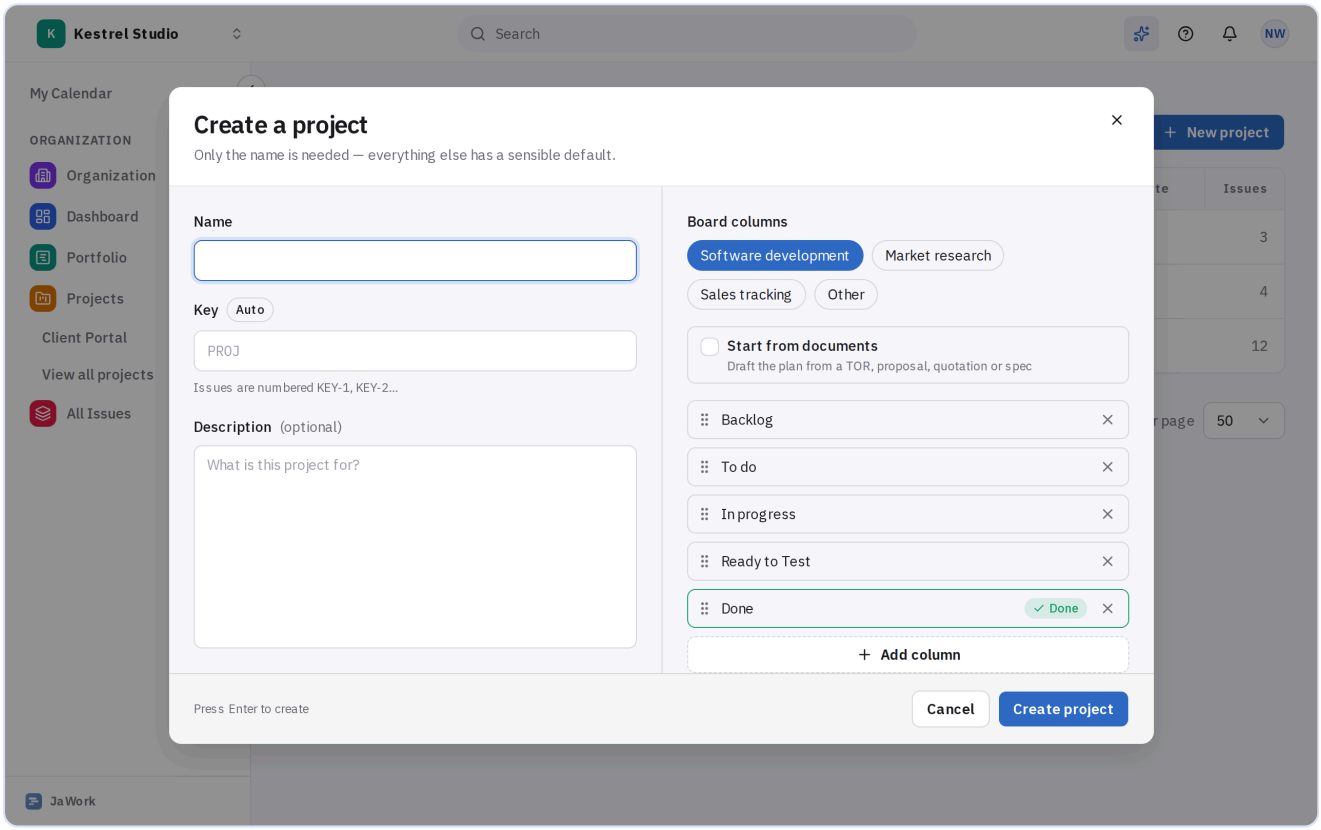
Online: jawork.app/help/admin/organization/working-calendar

PROJECTS

Create a project

Create a project with a name, a key for its issues and the board columns that suit the work — software, market research, sales or your own — or draft the plan from your documents.

A project holds one stream of work: its issues, board, plan, documents and reports. Anyone in the organization can create one and becomes its owner.



Create a project

1. Click **Projects** in the menu, then **View all projects**.
2. Click **New project**.
3. Type the **Name**. It is the only field you must fill in.
4. Check the **Key**. JaWork suggests one from the name; click **Auto** to type your own. Issues are numbered from it: KEY-1, KEY-2 and so on.
5. Add a **Description** if it helps.
6. Under **Board columns**, pick a starting set:
   - **Software development** — Backlog, To do, In progress, Ready to Test, Done;
   - **Market research**, **Sales tracking**, or **Other**.
7. Rename, reorder or remove the columns, or click **Add column**. The column marked **Done** is where finished work goes.
8. Click **Create project**, or press Enter.

The project opens on its board, with you as its owner and project admin.

Start from your documents

Tick **Start from documents** to draft the plan from a terms of reference, proposal, quotation or specification. JaWork reads the file and proposes the issues; you check them before anything is created. This uses AI credits.

> **Tip:** The key is fixed once the project has issues, so choose it with care.

Coming from Jira? Import a Jira project instead of starting empty.

Online: jawork.app/help/admin/projects/create

Statuses, issue types and custom fields

Shape a project to its work — add, rename and reorder board columns, mark which ones count as closed, set limits, and add custom fields to its issues.

A project’s statuses are its board columns. Its issues can be tasks, bugs, subtasks or milestones, and each project can add fields of its own. Only project admins change these.

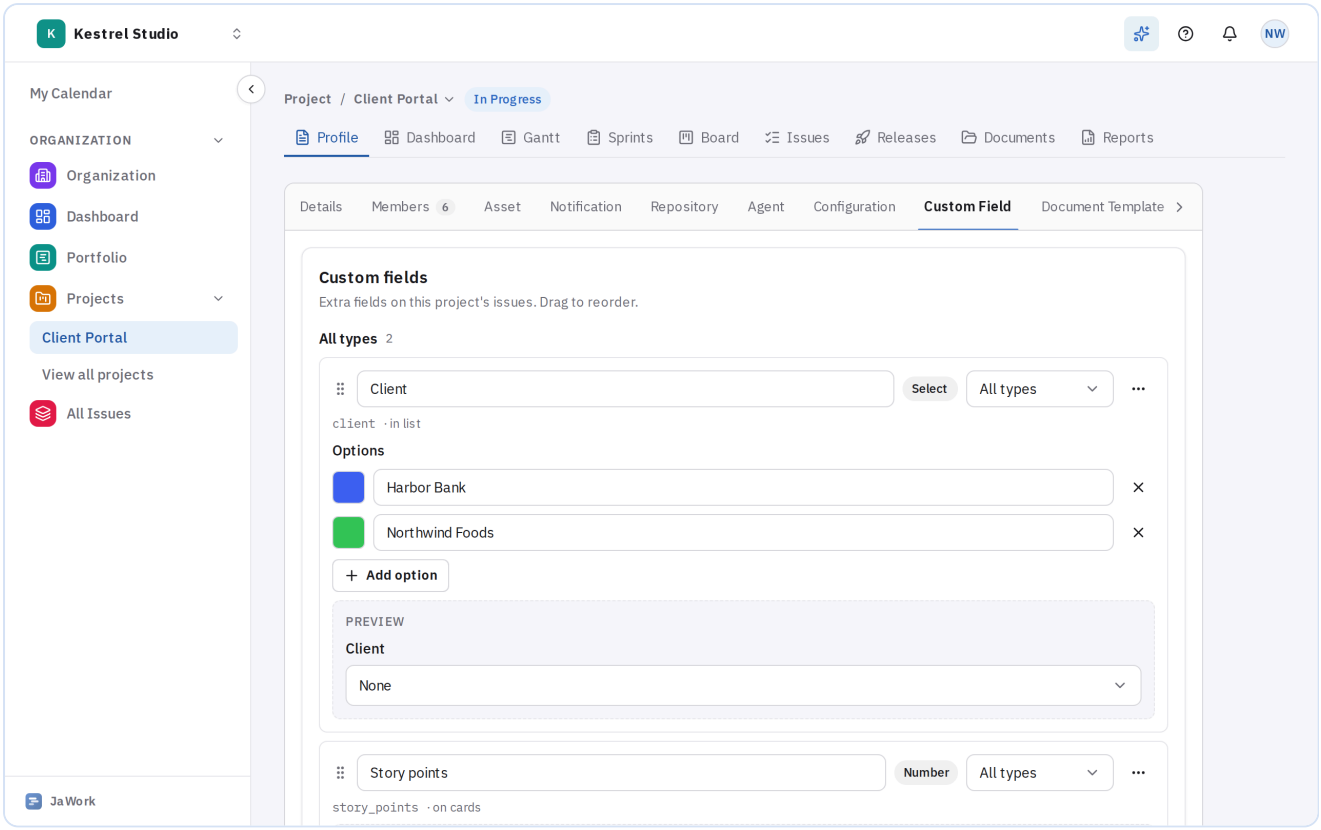
Board columns (statuses)

1. Open the project’s **Board**.
2. To add a column, use the empty column at the end of the board: type the **New column name** and press Enter.
3. To change columns, open **Manage columns** from the board’s toolbar. For each column you can:
   - rename it, or drag it to a new place;
   - set a work-in-progress limit (leave it at **No limit** if you don’t need one);
   - mark it **Counts as closed**, so its issues are left out of open counts;
   - choose who may edit an issue while it is in that column;
   - delete it, after choosing the column its issues move to.

Custom fields

Custom fields add your own information to issues, such as the client or story points.

1. Open the project’s **Profile** tab and then **Custom Field**.
2. Add a field, give it a name and choose its kind, such as **Select** or **Number**.
3. For a select field, add its **Options** and a colour for each with **Add option**.
4. Choose which issue types it is for, or keep **All types**.
5. Drag fields by the handle on the left to reorder them.



The **Preview** shows the field as people will see it on an issue. The ⋯ menu on each field holds more choices, such as showing it on board cards or in lists.

> **Tip:** A select field can become a swimlane: on the board, **Group by** lists it beside Assignee and Priority.

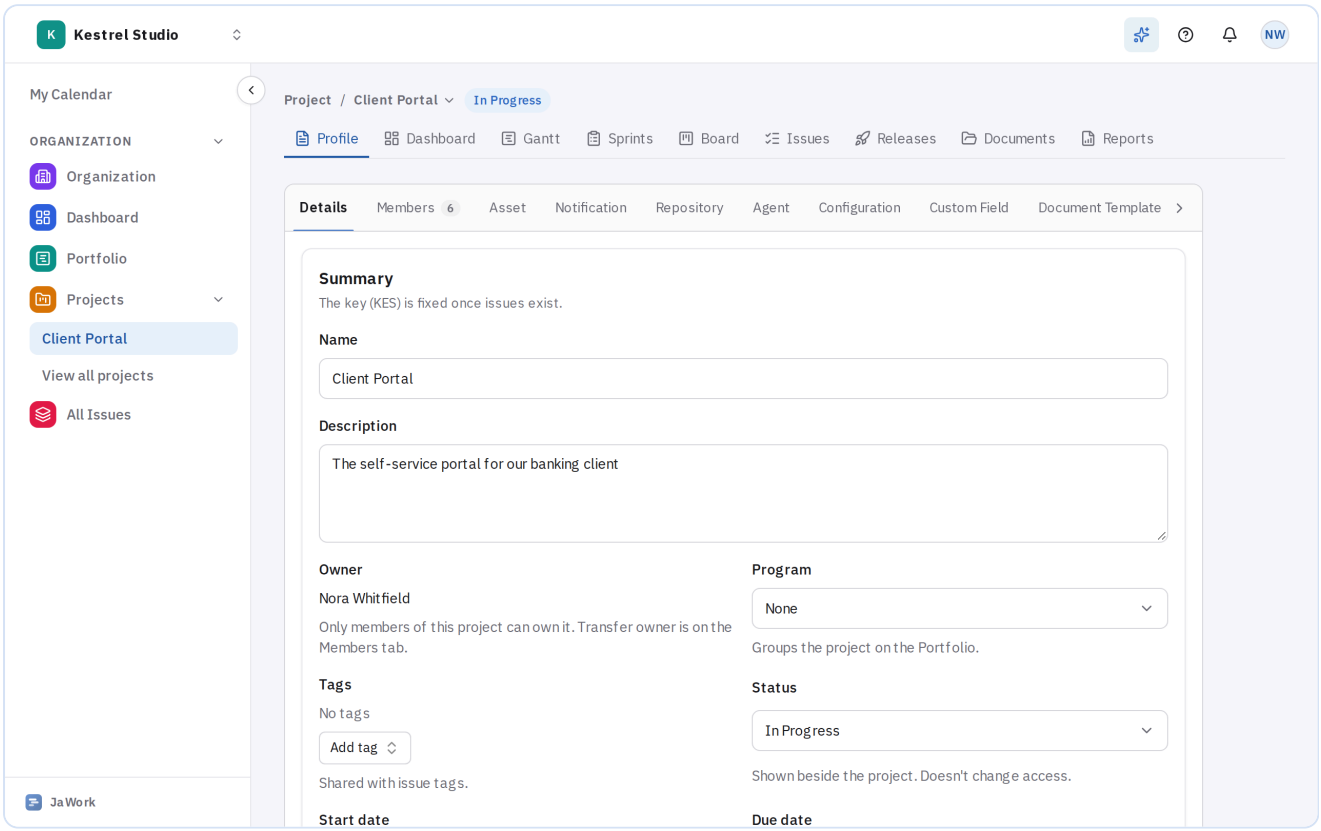
The rest of the project's settings are in the project profile.

Online: jawork.app/help/admin/projects/statuses-fields

The project profile — details, members, documents and notifications

A project's Profile holds its name, owner, program, status and dates, its members, who is emailed about new issues, its document templates and its other settings.

Everything about a project, apart from its issues, lives on its **Profile** tab. Members see **Details** and **Members**; project admins see every tab.



Details

1. Open the project and click **Profile**. It opens on **Details**.
2. Change the **Name** or **Description**.
3. Choose a **Program** to group the project with others on the **Portfolio**.
4. Set the **Status** — for example In Progress. It is shown beside the project's name and doesn't change who can open it.
5. Add **Tags**, and the project's **Start date** and **Due date**.

The **Owner** is shown here. Only a member of the project can own it; change the owner on the **Members** tab.

The other tabs

- **Members** — who is in the project and their role (Admin, Member or Viewer), each person's job role, and the owner.
- **Asset** — hardware bought for the project, kept in a list.
- **Notification** — who is emailed when someone creates a task, a subtask or a bug in this project.
- **Repository** — connect the project's code repository, so commits and pull requests that name an issue key show on the issue.
- **Agent** — the AI agent's work in each column. See AI agents on board columns.
- **Configuration** — sprints on or off, who may edit issues, and automations. See automation rules.
- **Custom Field** — your own fields on issues. See statuses and custom fields.
- **Document Template** — upload Office documents the project uses as templates.
- **Import** — bring issues in from Jira. See importing from Jira.

> **Tip:** The project's key, such as KES, is fixed once the project has issues.

Who can do what in a project is explained in roles.

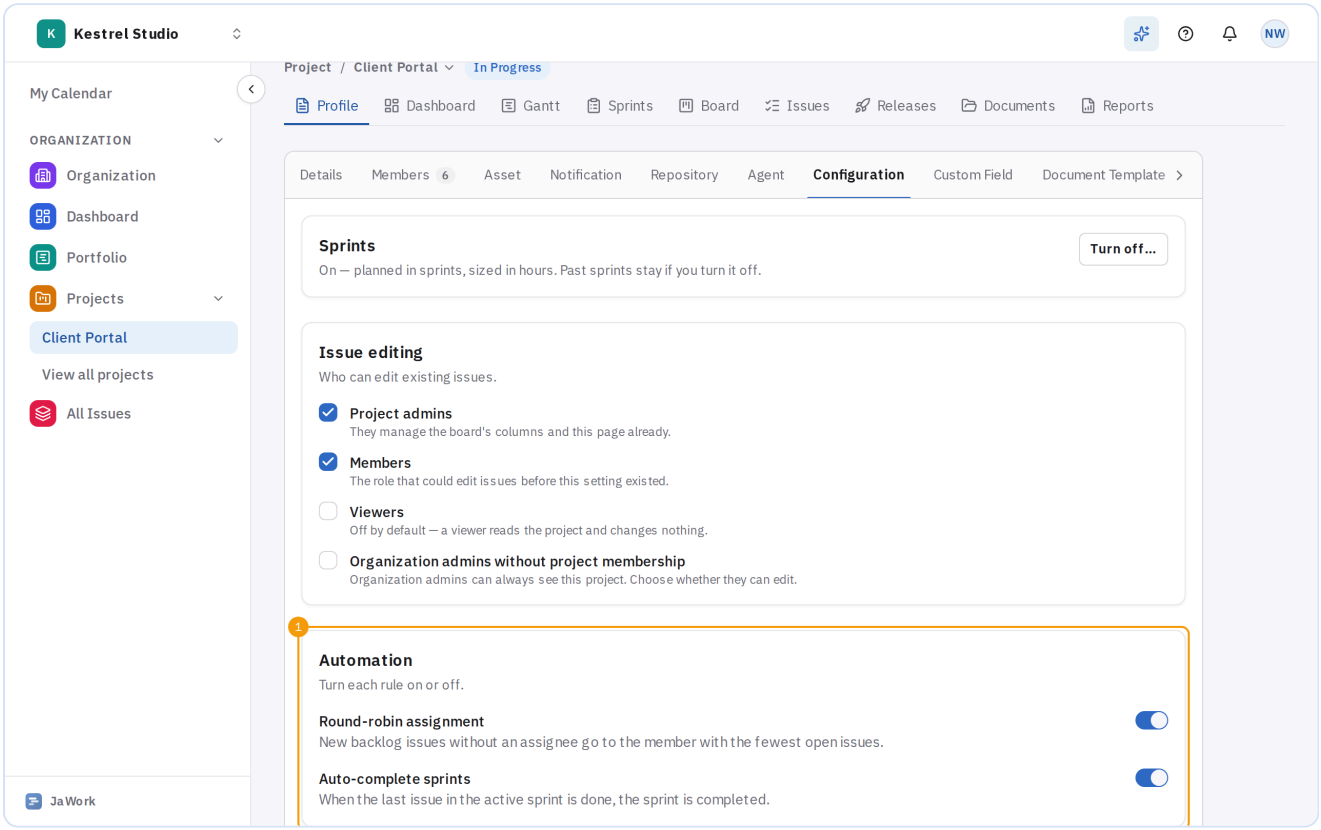
Online: jawork.app/help/admin/projects/profile

AUTOMATION

Automation rules

Turn on a project's ready-made automations — share out new issues round-robin, complete a sprint when its last issue is done — and choose who may edit issues and whether the project uses sprints.

Automations do routine work for you, so nobody has to remember it. Each project has its own, on the **Configuration** tab of its profile. Only project admins change them.



Turn a rule on or off

1. Open the project, click **Profile** and then **Configuration**.
2. Scroll to **Automation**.
3. Click the switch beside a rule. Blue means on.

The rules:

- **Round-robin assignment** — a new backlog issue with no assignee goes to the member with the fewest open issues.
- **Auto-complete sprints** — when the last issue in the active sprint is done, the sprint is completed for you.

The other settings on this tab

- **Sprints** — whether the project plans in sprints, sized in hours. Click **Turn off…** to stop; past sprints stay.
- **Issue editing** — who may edit existing issues: **Project admins**, **Members**, **Viewers**, and **Organization admins without project membership**.

> **Tip:** For work that needs judgement rather than a fixed rule — reviewing, summarising, drafting — put an AI agent on a column.

Read more about planning sprints.

Online: jawork.app/help/admin/automation/rules

IMPORTING

Import from Jira

Bring a Jira Cloud project into JaWork — its issues, workflow and people — as a new project or into an existing one, with a Jira API token.

If your team used Jira Cloud, you can bring a Jira project into JaWork instead of starting empty. The import copies its issues, and its workflow becomes the board's columns.

You need a Jira **API token**, which you create in your Atlassian account.

Create an API token in Atlassian

1. Sign in to your Atlassian account.
2. Create an API token and copy it. JaWork's import screen links straight to the right page: **Create an API token**.

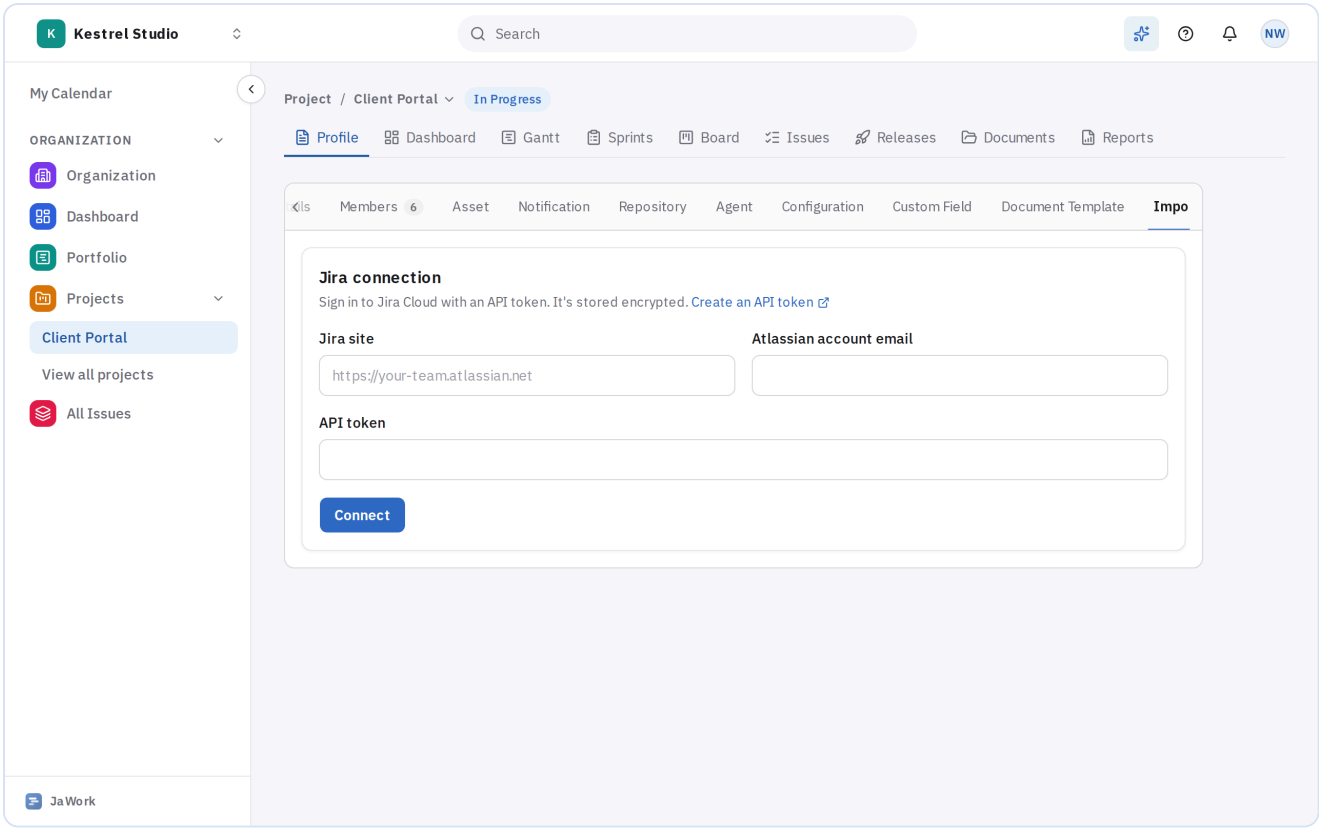
Import into a new project

1. Click **Projects**, then **View all projects**.
2. Click **Import from Jira**.
3. Type your **Jira site** (such as https://your-team.atlassian.net), your **Atlassian account email** and the **API token**.
4. Choose the Jira project to import.
5. Check the new project's name and key; they are filled in from Jira.
6. Start the import.

The project is created at once, and the issues arrive in the background. You can leave the page; the import keeps going.

Import into an existing project

1. Open the project, click **Profile**, then **Import**.
2. Fill in **Jira site**, **Atlassian account email** and **API token**, and click **Connect**.
3. Choose the Jira project and start the import.



Your token is stored encrypted, and only for this project.

> **Tip:** You can run the import again later. Issues already imported are updated, not copied twice.

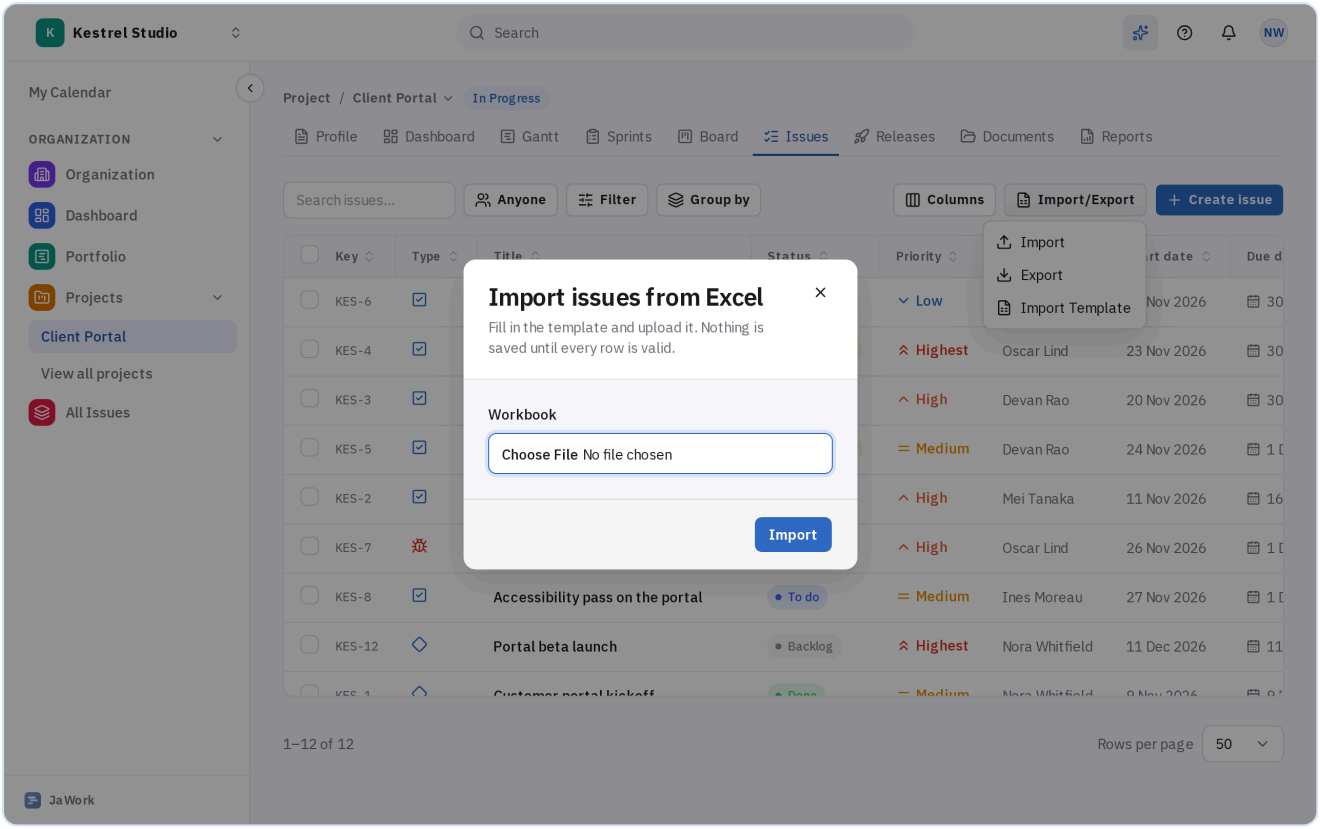
For a spreadsheet instead of Jira, see importing from Excel.

Online: jawork.app/help/admin/import/jira

Import issues from Excel

Download the import template, fill in your issues in Excel and upload the workbook — JaWork checks every row first and saves nothing until all of them are valid.

When your issues are in a spreadsheet, you can import them all at once. JaWork gives you a template to fill in.



Get the template

1. Open the project and click **Issues**.
2. Click **Import/Export**, then **Import Template**.
3. Open the downloaded workbook in Excel.

Fill it in

Add one issue per row: its title, type, status, priority, assignee, dates and so on, in the columns the template has. Use the people's emails and the status names your project already has.

Import it

1. Click **Import/Export**, then **Import**.
2. Under **Workbook**, click **Choose File** and pick your file.

3. Click **Import**.

JaWork checks every row before saving anything. If a row has a mistake, nothing is imported and JaWork tells you which row and why, so you can fix the file and try again.

Export issues

Import/Export › Export saves the project's issues as a workbook, for example to share with someone outside JaWork.

> **Tip:** Export a few issues first and look at the file: it shows exactly how each column should be filled in.

Coming from Jira? See importing from Jira.

Online: jawork.app/help/admin/import/excel

AI AGENTS

An AI agent on a board column

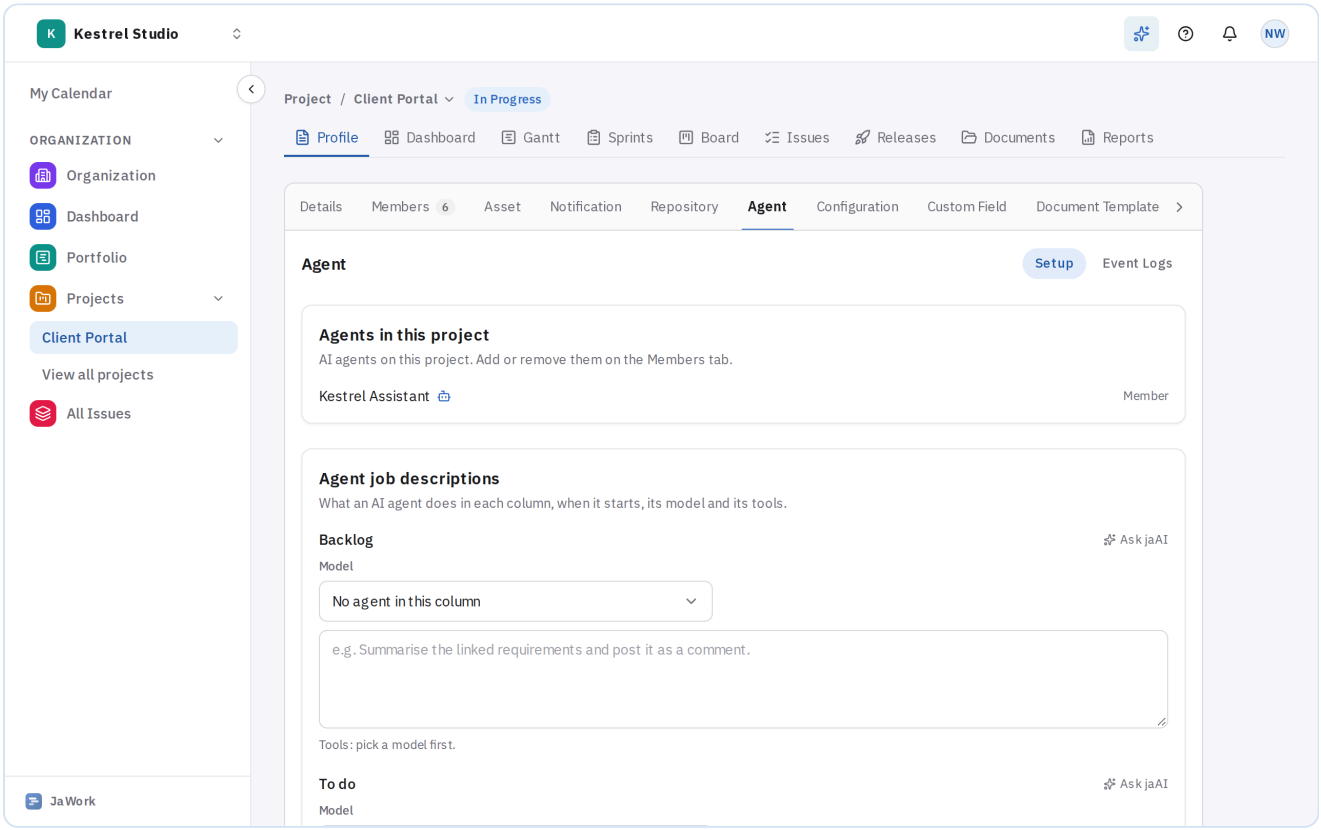
Give a board column an AI agent — a model, a job description and its tools — and choose when it starts: when a card enters, when someone mentions it, when a card is created or before a due date.

An AI agent is a teammate that works on cards. You give a column a job — for example “review the release notes and comment on anything missing” — and the agent does it whenever a card reaches that column.

AI agents must be switched on for your organization. Your organization has one agent; it doesn’t take a seat on your plan.

Set up the agent’s job

1. Open the project, click **Profile**, then **Agent**.
2. Under **Agents in this project**, check that your organization’s agent is listed. Add it on the **Members** tab if it isn’t.
3. Under **Agent job descriptions**, find the column, for example **AI review**.
4. Choose a **Model**. “No agent in this column” means the column has no agent.
5. Write the job description: what the agent should do with each card, in plain words.
6. Choose the tools it may use, once a model is picked.



Not sure what to write? Click **Ask jaAI** beside a column for help with the job description.

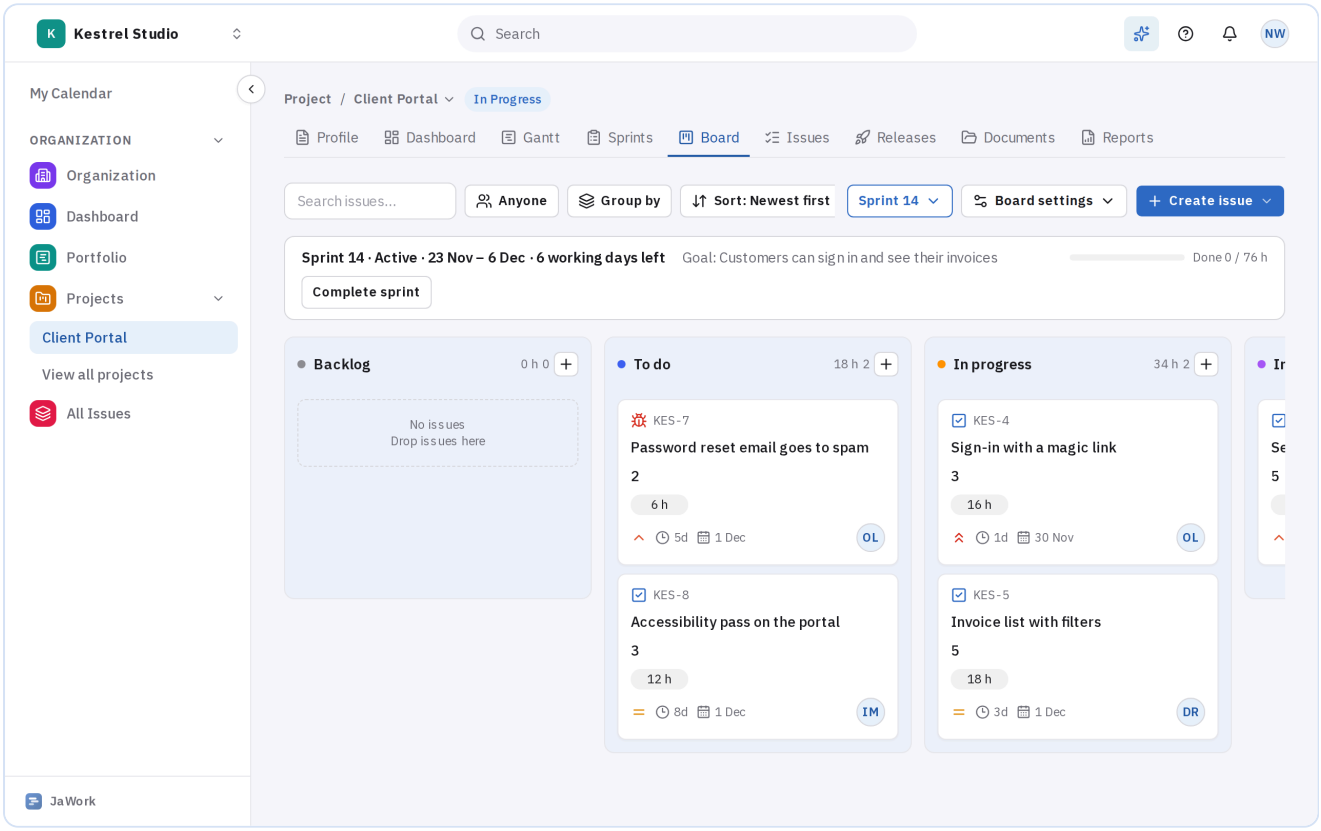
Choose when it starts

Under **When**, tick any of:

- **Card enters this column**;
- **Someone @mentions the agent in a comment**;
- **A new card is created here**;
- **Due in 1 day** — change the days and time under **More options**.

Watch it work

A card the agent is working on shows it on the board. The agent writes its result as a comment on the card, then moves on. Open **Event Logs** on the **Agent** tab to see every run.



> **Tip:** Give the agent its own column, like **AI review**, so everyone sees which cards are waiting for it.

Every run uses AI credits. Read how AI credits work.

Online: jawork.app/help/admin/ai-agents/columns

AI credits

What uses AI credits — agents, jaAI and drafting plans — how many your plan includes, how to see the balance, buy more and top up automatically.

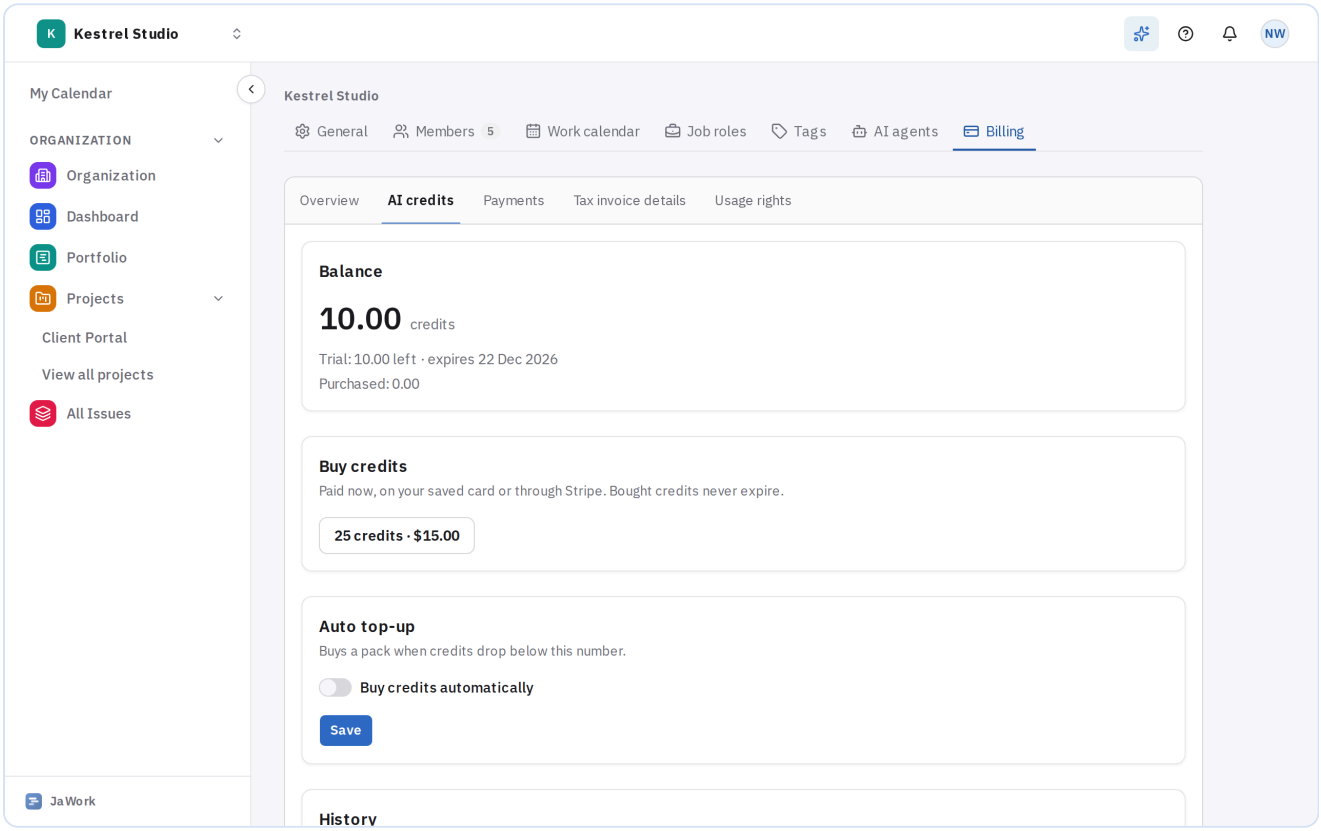
AI work in JaWork is paid for in **AI credits**, shared by the whole organization. A question to jaAI, a run by an AI agent and a plan drafted from your documents each use some.

What your plan includes

- A new organization gets **10 trial credits**, valid for **30 days**.
- On the **Monthly** and **Yearly** plans, the organization gets **1 credit a week for each person**.
- Bought credits never expire.

See your balance

1. Click **Organization** and open the **Billing** tab.
2. Open **AI credits**.



Balance shows what is left, split into trial and purchased credits, with the trial's expiry date. **History**, further down, lists what was used and bought.

Buy credits

Under **Buy credits**, click the pack — **25 credits · $15.00**. It is paid now, on your saved card or through Stripe.

Top up automatically

1. Under **Auto top-up**, turn on **Buy credits automatically**.
2. Choose the number below which a pack is bought.
3. Click **Save**.

Know before you spend

Buttons that use AI, such as drafting a plan, carry a purple **AI** mark with their usual cost, such as **AI 0.4**. Hover over it to see the cost and your balance. When there aren't enough credits, the button is turned off and tells you why.

jaAI's box shows no costs. What each question used is listed in **History** on this tab, and when credits run out jaAI says so in the conversation.

> **Tip:** On the Agent tab, each column's model shows the usual cost of one run, so you can pick a cheaper model for simple jobs.

Plans and seats are explained in plans, seats and invoices.

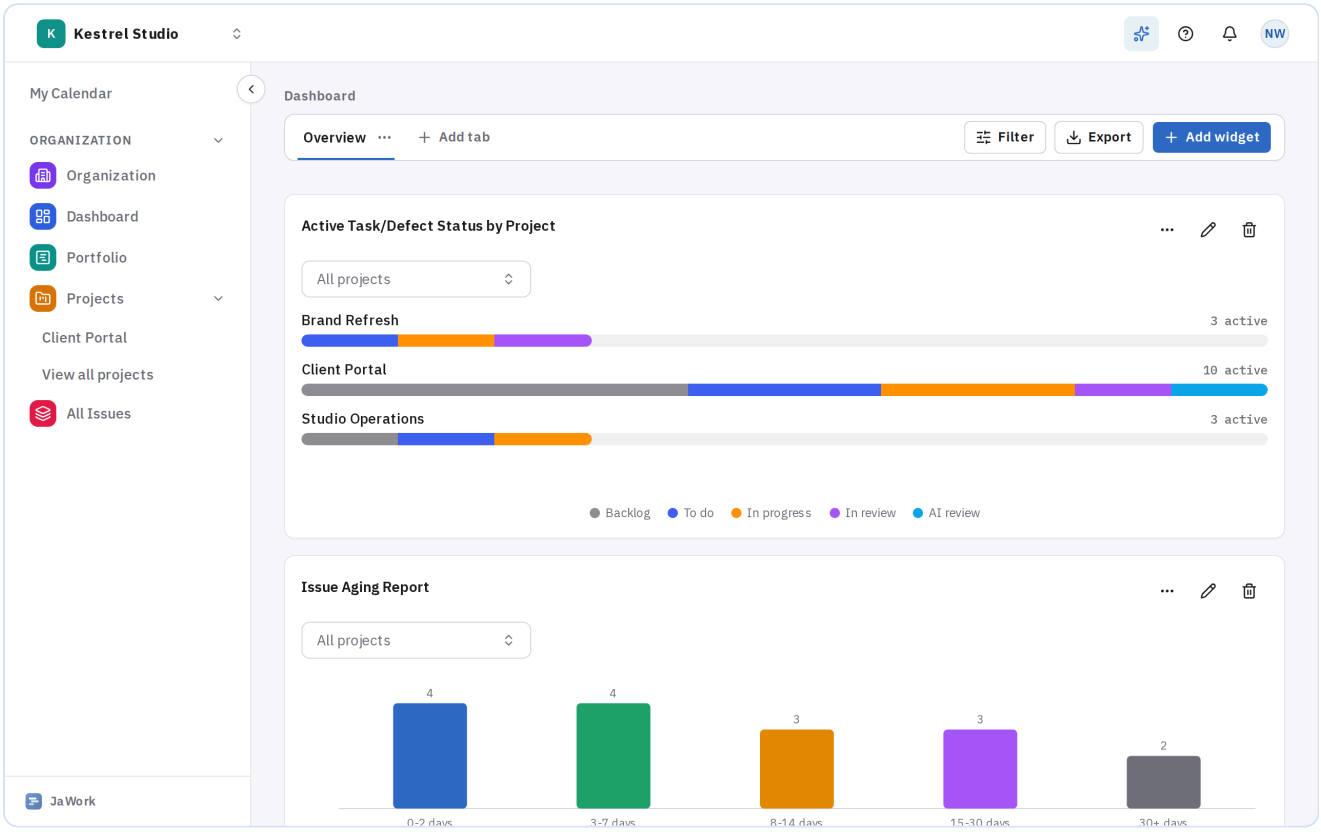
Online: jawork.app/help/admin/ai-agents/credits

DASHBOARDS AND REPORTS

Build dashboards and custom reports

Add tabs and widgets to the organization's and each project's dashboard — ready-made metrics, numbers, tables, pivot tables and charts built from your issues, worklogs or sprints.

Admins decide what a dashboard shows. Organization admins shape the organization's **Dashboard**; project admins shape their project's **Dashboard** tab.



Add a widget

1. Open the dashboard and the tab you want to change.
2. Click **Add widget**.
3. Choose from the gallery on the right:
   - **Ready-made** — metrics such as status by project, issue aging, utilization and cost;
   - **One number** — a single count or sum;
   - **Tables** — a table or a pivot table;
   - **Charts** — vertical bar, horizontal bar, line, pie, stacked bar or bubble.
4. Set it up on the left: the data (issues, worklogs or sprints), the conditions, and how to group and count. The live preview shows the result as you go.
5. Save. Drag the widget to place it and drag its corner to resize it.

To change or remove a widget, use the ⋯ menu at its top right. A removed ready-made widget can be added back at any time.

Add a tab

Click **Add tab** to give the dashboard another page, for example one per client. On a project dashboard, **From template** adds a ready-made tab, such as a Flow or Sprint tab.

Share what it shows

- **Filter** applies one filter to every widget on the tab.
- **Export** saves the tab as a picture, or emails a picture of it on a schedule.

> **Tip:** Set your job roles and rates first, so cost widgets show real money.

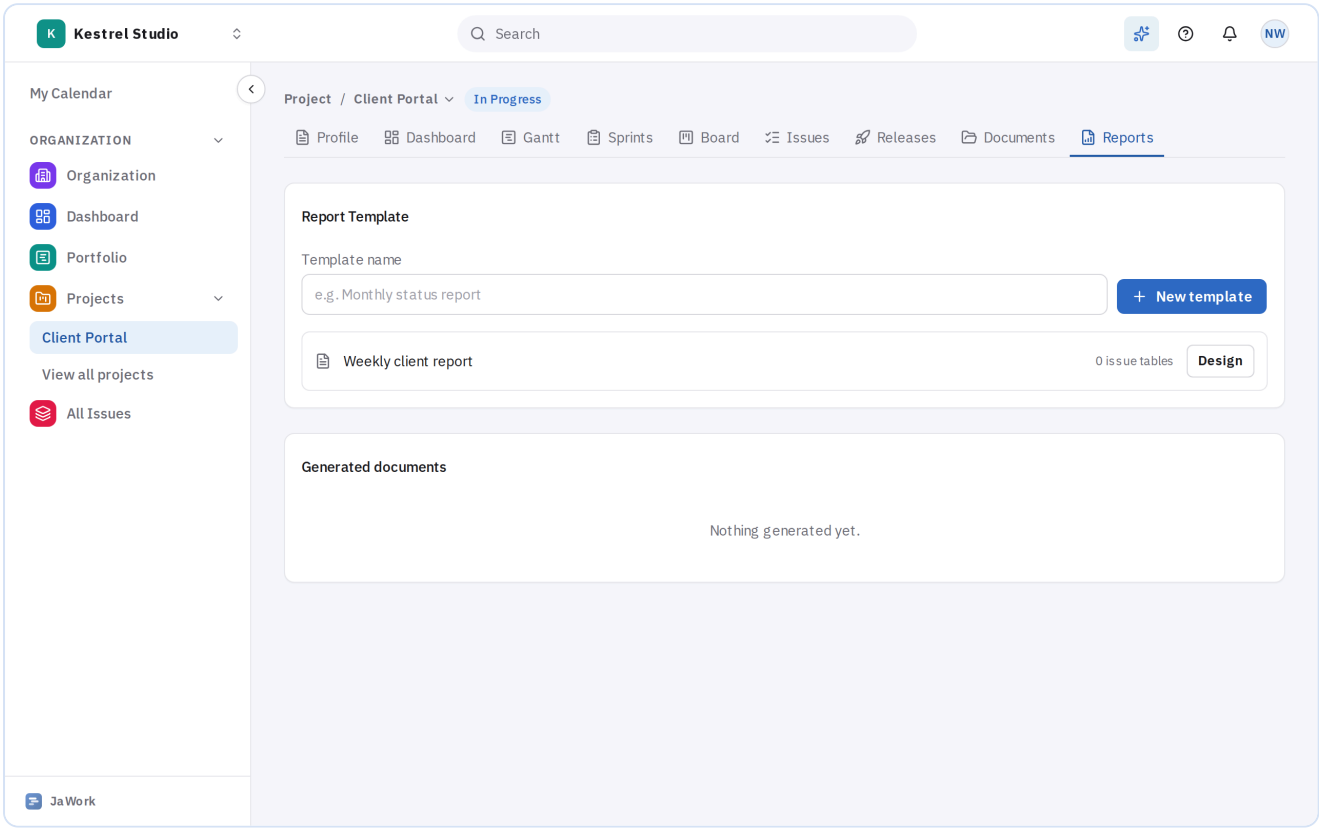
For documents in PDF, Word or Excel, use the Reports tab.

Online: jawork.app/help/admin/reports/dashboards

Report templates — PDF, Word and Excel

Design a reusable report for a project, such as a weekly client report, run it whenever you need it and download the result as PDF, Word or Excel.

The **Reports** tab turns a project's issues into a document you can send: a weekly client report, a monthly status report or a handover. You design it once and run it as often as you like.



Create a template

1. Open the project and click **Reports**.
2. Under **Report Template**, type a **Template name**, such as "Monthly status report".
3. Click **New template**.

Design it

1. Click **Design** beside the template. The designer opens on a page of its own.
2. Write the report like a document: headings, text, and tables of issues that fill themselves in when the report runs.
3. Save.

The list shows how many issue tables each template has.

Run it

1. Open the template and click **Run**.
2. JaWork builds the document in the background.
3. When it is ready, it appears under **Generated documents**. Click **PDF**, **Word** or **Excel** to download it.

> **Tip:** Run the report just before you send it: the issue tables always show the project as it is at that moment.

Cancel a report

A report that is **QUEUED** or **RUNNING** has a **Cancel** button under **Generated documents**. You can cancel a report you ran, and a project admin can cancel anyone's.

1. Click **Cancel** beside the report.
2. A queued report stops at once; a running one stops soon after. Nothing is kept from it.
3. The row reads "Cancelled by" and your name. Click **Run again** to start it afresh with the same formats.

Large projects

A report can hold up to 5,000 issues. If more than 5,000 issues match, the report doesn't run and says "This project has more than 5,000 issues — filter the report to fewer." Add conditions to the issue tables in the designer so fewer issues match, then run it again.

A table that shows descriptions and comments shows each issue's last 20 comments. When an issue has more, the cell starts with "(+n earlier)", where n is how many were left out.

"The report stopped before it finished"

This means the report was interrupted twice while it was being built, usually because it was too large. JaWork tells you in your notifications. Try fewer columns or tables, or filter the issue tables, then run it again.

For live charts instead of a document, build a dashboard.

Online: jawork.app/help/admin/reports/report-menu

BILLING

Plans, seats and invoices

Your plan — Free for up to five people, then Monthly or Yearly per person — how seats are counted, how to switch, and where your payments and tax invoices are.

Your organization's plan, seats and invoices are on the **Billing** tab. Organization admins manage it.

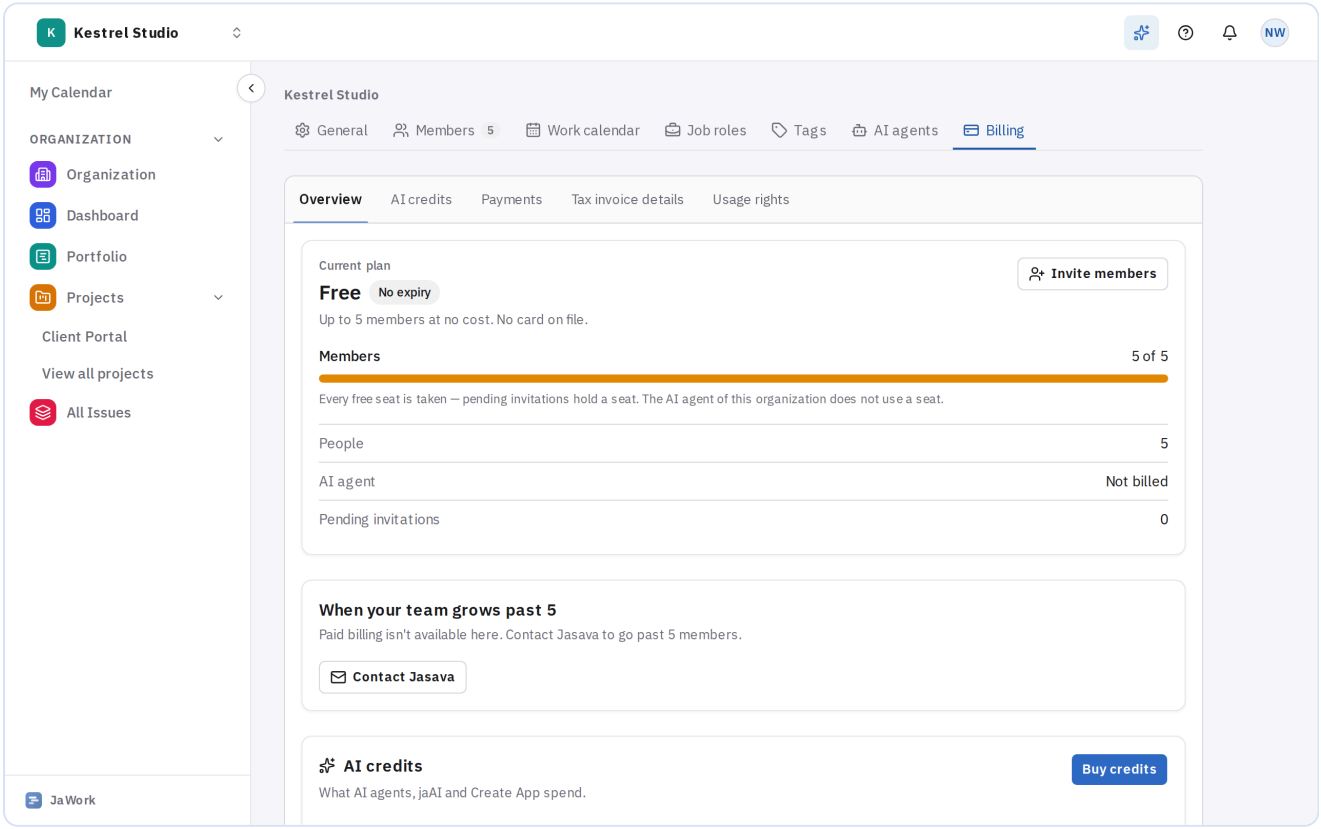
The plans

- **Free** — up to **5** people, no card needed, no expiry.
- **Monthly** — **$5** per person per month.
- **Yearly** — **$51** per person per year, 15% less than paying monthly.

Prices are on the pricing page.

See your plan and seats

1. Click **Organization** and open the **Billing** tab. It opens on **Overview**.
2. **Current plan** shows your plan and how many members you have.



How seats are counted:

- every person who uses JaWork takes a seat;

- a **pending invitation** also holds a seat until it is accepted or cancelled;
- your **AI agent** is not billed and takes no seat.

Invite members takes you to the Members tab.

Go past five people

When your team grows past five, choose **Monthly** or **Yearly** under “When your team grows past 5” and add a card. On a paid plan, the Overview shows the next bill, seat changes in this cycle and your payment method, with **Switch to annual** or **Switch to monthly**. A switch takes effect at the end of the current cycle.

If paid billing isn’t offered on your organization, click **Contact Jasava**.

Payments and tax invoices

- **Payments** lists what you have paid, with each invoice and receipt.
- **Tax invoice details** holds the company name, address and tax ID printed on your invoices.
- **Usage rights** holds the usage-rights documents Jasava issues for your organization.

> **Tip:** Before inviting someone on a full Free plan, cancel invitations nobody will accept — they hold seats too.

AI credits are billed separately: see AI credits.

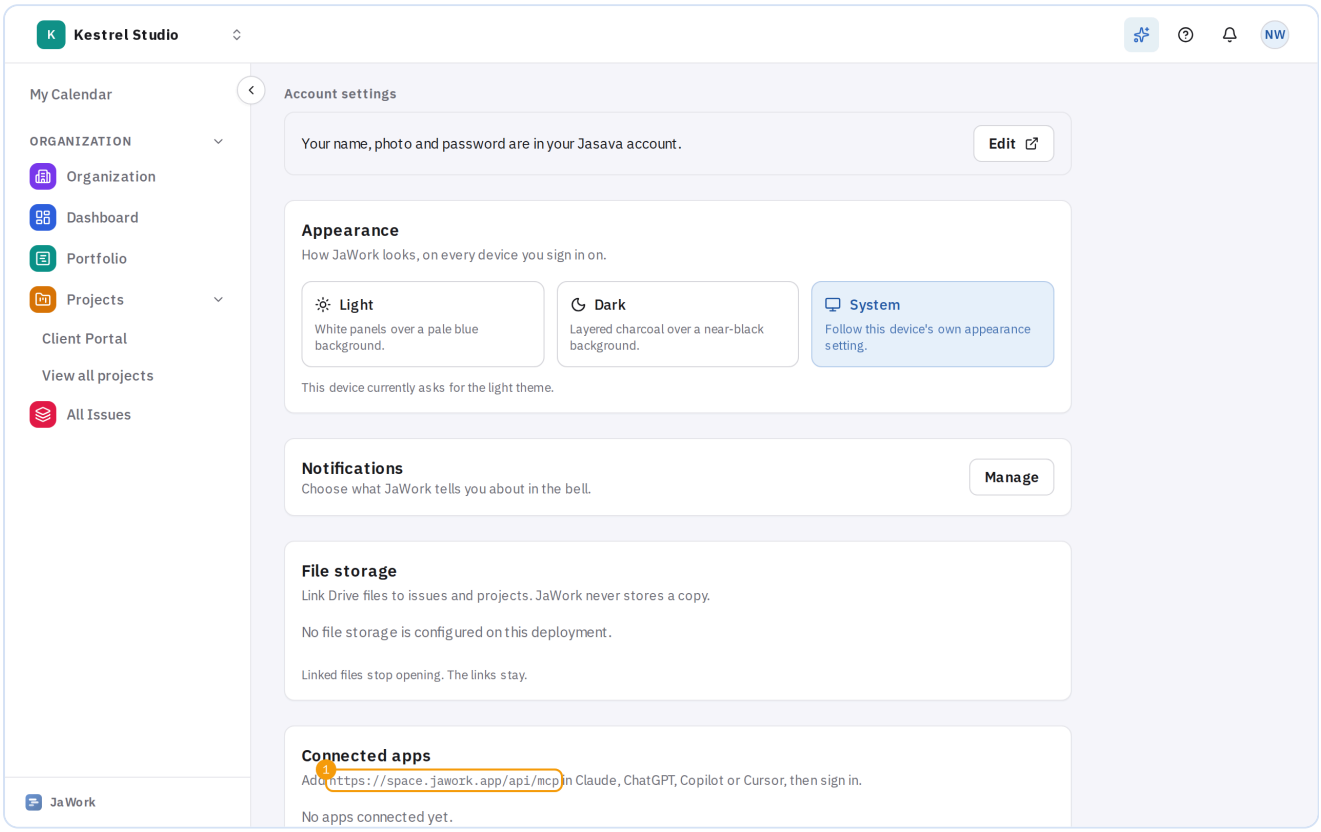
Online: jawork.app/help/admin/billing/plans

AI ASSISTANTS AND SECURITY

Connect AI assistants (MCP)

Let Claude, ChatGPT, Copilot or Cursor read and update your JaWork work through MCP — sign in and allow, or use an API token — and what they can reach.

JaWork works with AI assistants such as Claude, ChatGPT, Copilot and Cursor through **MCP**, an open standard for connecting assistants to apps. Once connected, you can ask your assistant about your issues, or have it create and update them.



Connect an assistant

1. Open your **Account settings** and scroll to **Connected apps**. It shows the address to use: **https://space.jawork.app/api/mcp**.
2. In your assistant, add a new connector or MCP server with that address.
3. Your assistant opens JaWork's sign-in. Sign in and press **Allow**.

The assistant is now listed under **Connected apps**. Click **Disconnect** to remove it at any time.

Use an API token instead

Some tools can't sign in and need a token:

1. On **Account settings**, under **API tokens**, type a **Name**, such as "Claude Desktop".
2. Choose the **Organization** the token is for, and an expiry date if you want one.

3. Click **Create token** and copy it at once. JaWork shows it only this one time.

The tool sends it as **Authorization: Bearer …**. Revoke a token from the same list when you no longer need it.

What an assistant can reach

An assistant acts as **you**. It sees only the organizations, projects and issues you can see, and changes only what you are allowed to change — the same rules as on screen. Nothing more.

> **Tip:** Make one token per tool, so you can revoke one without breaking the others.

jaAI, JaWork's own assistant, needs no setup: see Ask jaAI.

Online: jawork.app/help/admin/security/mcp