Working With Records

- [Adding and Viewing Records](#)

Adding and Viewing Records

Adding Records to the Budget Tracking Board app within Jira simplifies how records are managed for system, project, or Jira Issue levels. With a few clicks, you can input critical budget details and stay informed about your financial allocations, ensuring streamlined project management.

You can add records with detailed and precise fields. Among these are the Budget Category, Allocated Amount, Spent Amount, Approval Status, Project, and Department. Additionally, you can include any custom fields you have configured. Tags can also be incorporated to enhance the specificity of the records.

Upon navigating to the Budget dashboard page, start by clicking the Create button. Here, you'll be prompted to enter data across all reflected fields: Budget Category, Allocated Amount, Spent Amount, Approval Status, Project, Department, and any custom fields or tags. Once saved, these records will be accessible for viewing on the Budget dashboard.

1. **Create and Manage Multiple Views**
   Easily personalize your reporting by selecting the View dropdown at the dashboard's top. Options here include creating new views, managing existing ones, or clearing them. Note that changes to views require admin role permissions.
2. **Filter by a Column Value**
   Narrow down your data by using the filtering option available on columns with filter capabilities. Simply click the column title icon and input your criteria.
3. **Sort by a Column Value**
   Organize your records by clicking on any column title and double-clicking to sort. You can choose between ascending or descending order to refine your data presentation.
4. **View Activity History**
   Track all user activity that impacts data by accessing the Activity History. This feature is located by clicking the three-dot menu in the top right corner of the dashboard.

The Budget Tracking Board app helps maintain financial oversight through efficient record-keeping and customizability. By managing records and views effectively, users ensure precise tracking and insightful budget analytics within Jira.