Appvibe Client Project Dashboard

Overview of Features

Key Features

Appvibe Client Project Dashboard is a Jira app designed to organize tasks, timelines, and deliverables for client projects, providing a transparent overview of project status. This tool visually coordinates various project elements, allowing teams to monitor progress and tackle issues promptly. By centralizing project information, the dashboard supports efficient management of client projects and empowers teams to meet deadlines effectively.

Integrating customer feedback is crucial to refining project tasks and enhancing deliverables. The Appvibe Client Project Dashboard enables seamless incorporation of client input, ensuring that customer requirements are aligned with project objectives. This approach not only improves client satisfaction but also optimizes project outcomes by addressing real-time concerns.

- **Feedback Submission**: Capture feedback seamlessly through Jira issues and dedicated forms.
- **Organized Views**: Use tags, filters, and saved views to sort and prioritize feedback efficiently.
- **Direct Jira Integration**: Link customer feedback to Jira issues, ensuring actionable follow-ups.
- **Customizable Layout**: Add, remove, or rearrange columns to suit your team's feedback tracking needs.
- **Activity History**: Maintain a clear log of actions and updates made to each feedback record.

By leveraging the features of the Appvibe Client Project Dashboard, teams can enhance collaboration and ensure that client projects remain on track. This app provides the tools needed to adapt to feedback swiftly, making it an essential component for your project management strategy.

Getting Started

Installation

Client Project Dashboard is a Jira app designed to streamline project management tasks by providing comprehensive insights and tracking capabilities for client projects. Follow these steps to install and access the app within your Jira environment.

Step 1:

Log in to your Jira account. Ensure you are logged in with Admin privileges to proceed with app installations and configurations.

Step 2:

Open the Atlassian Marketplace by navigating to Jira and clicking on Apps → Explore more apps. This will allow you to search for and discover new Jira apps.

Step 3:

Use the search bar in the Marketplace to find **Appvibe Client Project Dashboard**. This will direct you to the app page where you can access detailed information.

Step 4:

Install the app by clicking Get app or Try it free. Follow the on-screen prompts to confirm the installation and grant any required permissions.

Step 5:

After installation, go to Manage Apps in the Admin section of Jira to verify that the app is enabled and ready for use.

Upon successful installation, you will find the Client Project Dashboard link under the Apps section in the menu on the left side of your Jira screen. This integration will enhance your project management capabilities, providing a centralized hub for monitoring client projects efficiently.

Configuration

Setup and Customization

Navigate to the configuration and setup of the Appvibe Client Project Dashboard through Jira by selecting **Manage Apps**. Locate the Appvibe Client Project Dashboard app and click on the **Configuration** button. This will direct you to the configuration page, where you can manage Roles and Permissions, view System Fields, configure Custom Fields, and set up Conditional Formatting.

Roles and Permissions

The Appvibe Client Project Dashboard app supports three roles:

1. **Admin**: The super role with complete access, allowing configuration and setup management.
2. **Editor**: Grants full access to update and view Client Project Dashboard data.
3. **Viewer**: Permits viewing but not updating of Client Project Dashboard data.

An administrator can assign these roles to any Jira groups as needed. By default, Jira Administrators have access to Client Project Dashboard configuration screens.

System Fields

The app includes predefined fields essential for the Client Project Dashboard:

- Task Name
- Client
- Due Date
- Assigned Team
- Progress
- Dependencies
- Tags

These base fields are necessary for effective project management within the dashboard.

Custom Fields

To define additional fields, select the **Add Field** button. Configure new fields using the following options:

- **Field Key**: A unique key identifier.
- **Field Label**: The display label for the field.
- **Field Type**: Choose from Text, Number, Date, Select, or Multi-Select.
- **Required**: A flag to specify if the field is mandatory.
- **Sortable**: A flag to determine if the field is sortable.
- **Filterable**: A flag to determine if the field is filterable.

Conditional Formatting

This feature allows data to be formatted based on specified conditions. If conditions are met, labels and highlight colors can be altered to enhance data visualization.

Summary

The Appvibe Client Project Dashboard app offers robust configuration options tailored to project management needs, including role assignment, field customization, and advanced data formatting. Proper setup ensures that teams have the necessary tools and access to manage projects efficiently within Jira.

Working With Records

Adding and Viewing Records

Adding records to the Appvibe Client Project Dashboard is straightforward and flexible. Whether you're working at the system, project, or Jira Issue level, the process is designed to be seamless and intuitive. By utilizing this functionality, you can keep all your project data well organized and accessible.

When adding a record, you have the option to populate several predefined fields: Task Name, Client, Due Date, Assigned Team, Progress, and Dependencies. Additionally, you can fill in any custom fields that you've previously defined. To begin creating a new record, navigate to the Client Project Dashboard page and click the "Create" button. Here, you can input the relevant data for each field and enhance your record with tags for further categorization.

1. **Create and Manage Multiple Views**
   You can customize how project information is displayed by managing multiple views. By selecting the "View" dropdown at the top of the dashboard, you can create, manage, or clear views to suit your preferences. Note that making changes to views requires admin role permissions.
2. **Filter by a Column Value**
   Enhance data accessibility by filtering column values. This feature is available for columns with filtering enabled, and you can activate it by selecting the column title icon and adding your filter criteria.
3. **Sort by a Column Value**
   Organize your records efficiently by sorting data within the dashboard. Simply double-click on a column title to sort the records in ascending or descending order.
4. **View Activity History**
   Maintain a complete audit trail of all user activities. View detailed modifications by clicking on the three dots located in the top right of the dashboard and selecting "Activity History."

In summary, the Appvibe Client Project Dashboard simplifies the management of project data. By enabling you to add comprehensive records and customize your dashboard views, you can ensure that project information is both accessible and actionable.

FAQ

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What is the object and purpose of this app?

The purpose of the app is for Client Task management. It is designed to organize tasks, timelines, and deliverables for client projects, offering a clear overview of project status.

What types of feedback can the app track?

The app supports tracking Client Project Task Name, Client, Due Date, Assigned Team, Progress, Dependencies. You can also add custom fields for other related fields that you wish to track.

How do I install the app?

You can install the app from the Atlassian Marketplace. Navigate to the Apps section in Jira. Search for the app name Client Project Dashboard. Click Install and follow the prompts.

How do I get support for the app?

Support is available via our support page at https://appvibe.com/support.

Support

Support

Appvibe Support

Overview:
The Appvibe Client Project Dashboard app seamlessly integrates with Jira to streamline the management and accessibility of client projects. The app skillfully organizes tasks, timelines, and deliverables, providing a comprehensive overview of project status. This functionality empowers businesses to effectively oversee client projects within the familiar Jira environment.

Support Contact:
We are committed to supporting you in maximizing the potential of the Appvibe Client Project Dashboard. For any assistance or to suggest new features, please reach out to us on our Support

Page at https://www.appvibe.com/support.