

# Working With Records

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# Adding and Viewing Records

Adding records in the Appvibe Maintenance Scheduler for Jira is straightforward and efficient, allowing for enhanced organization of maintenance tasks. Users can add records at different levels, including system, project, or directly linked to a Jira issue. This flexibility ensures that records fit seamlessly into existing structures, facilitating easy access and management.

When adding a record, you can input data into several predefined fields: Maintenance Type, Asset, Scheduled Date, Completion Status, Assigned Technician, and Notes. Additionally, you have the option to include custom fields specific to your requirements. Begin by navigating to the Maintenance dashboard page and clicking the "Create" button. Enter the relevant information for each field, including any tags and custom fields, to tailor the record to your specific needs. Once the record is created, it becomes visible on the Maintenance dashboard.

On the dashboard, you have several options to manage and interact with your records:

1. **Create and Manage Multiple Views:** Easily manage different views by using the "View" dropdown located at the top of the dashboard. This feature allows you to create new views, modify existing ones, or clear them. Note that view management is restricted to users with administrative privileges.
2. **Filter by a Column Value:** Enhance your data searching capabilities by filtering records based on specific column values. This can be done by selecting the desired column title icon and entering the filter criteria. Be aware that filtering is only available for columns with filter functionality enabled.
3. **Sort by a Column Value:** Order your records efficiently by clicking the column title twice to sort them in either ascending or descending order. This allows you to quickly navigate through data according to the selected column.
4. **View Activity History:** For comprehensive oversight, all user activities that involve data modifications are logged. Access the activity history by clicking the three dots located at the top right corner of the dashboard and selecting "Activity History."

In summary, the Appvibe Maintenance Scheduler provides a robust solution for logging and tracking maintenance records within Jira. Its user-friendly interface and powerful dashboard management tools ensure that maintenance tasks are organized, accessible, and manageable, contributing to high operational efficiency.