

Working With Records

- [Adding and Viewing Records](#)

Adding and Viewing Records

Adding records to Appvibe Procurement Tracker is seamless, offering flexibility to associate records at a system, project, or Jira Issue level. Developers and project managers can ensure precise tracking and management of procurement processes directly within their Jira environment.

When adding a record, users can input data into the following fields: Order Number, Supplier, Item Description, Quantity, Cost, Approval Status, and any custom fields defined for enhanced tracking. Start by navigating to the Procurement dashboard page and click the Create button to enter the necessary details. Once the record is created, it becomes accessible within the Procurement dashboard for further actions.

1. **Create and Manage Multiple Views**

Customize how you display procurement records by accessing the View dropdown at the top of the dashboard. Here, you can create new views, manage existing ones, or clear a view. Note that changes to views require admin role permissions.

2. **Filter by a Column Value**

Enhance data visibility by applying filters to columns. Click on the column title icon and input your filter criteria. Filters are available only on columns with the filter feature enabled.

3. **Sort by a Column Value**

Organize records by sorting them based on any column. Select and double-click the column title to toggle between ascending or descending order, providing an efficient way to view data priorities.

4. **View Activity History**

Track modifications to procurement records utilizing Activity History. Access this by clicking the three dots in the upper right corner of the dashboard and selecting Activity History, ensuring transparency of data changes.

Overall, Appvibe Procurement Tracker provides robust functionality to add, manage, and organize procurement data within Jira, enhancing project transparency and control. By offering multiple customization options and detailed activity oversight, it caters to the nuanced needs of developers and project managers alike.