

Setup and Customization

Navigate to the configuration and setup of the Appvibe Procurement Tracker by accessing Jira's Manage Apps section. Locate the app and click the "Configuration" button. This action redirects you to the procurement tracker configuration page, where you can define roles and permissions, manage system fields, create custom fields, and set up conditional formatting.

Roles and Permissions

The Appvibe Procurement Tracker supports three roles:

1. **Admin:** This super role provides complete access, including configuration and setup capabilities.
2. **Editor:** Allows users to fully update and view Procurement Tracker data.
3. **Viewer:** Permits users to view, but not alter, Procurement Tracker data.

Administrators have the power to assign these roles to any Jira groups. By default, a Jira Administrator can access the Procurement Tracker configuration screens.

System Fields

Procurement Tracker comes with predefined fields essential for its functionality, which include:

- Order Number
- Supplier
- Item Description
- Quantity
- Cost
- Approval Status
- Tags

These fields constitute the fundamental data elements required for operation within the app.

Custom Fields

To accommodate additional data requirements, you can define custom fields by selecting the "Add Field" button. Upon creation, each field requires the following specifications:

- **Field Key:** A unique identifier for the field.

- **Field Label:** A description for the key.
- **Field Type:** The data type, options include Text, Number, Date, Select, Multi-Select.
- **Required:** Flag to determine if the field is mandatory.
- **Sortable:** Flag to specify if the field can be sorted.
- **Filterable:** Flag to indicate if the field can be filtered.

Conditional Formatting

Conditional formatting enables dynamic data presentation based on specific field values. Conditions can be established to alter the appearance of labels and highlight colors when certain criteria are satisfied.

Summary

In summary, the configuration and setup of the Appvibe Procurement Tracker within Jira provide a robust framework for managing procurement processes. By leveraging roles and permissions, system fields, custom fields, and conditional formatting, you can tailor the app's functionality to meet your organization's needs efficiently.

Revision #1

Created 3 January 2025 03:09:11 by Admin

Updated 3 January 2025 03:09:11 by Admin