Working With Records

Adding and Viewing Records

Adding Records to Project Resources in Appvibe Project Resource Planner is a straightforward process that significantly enhances resource management capabilities within Jira. You can efficiently add records at the system, project, or Jira Issue level to streamline project tracking and resource allocation.

To add a record, navigate to the Project Resources dashboard page and click the 'Create' button. You will need to input data for the essential fields, including Resource Name, Project, Availability, Task Assignment, Start Date, End Date, and any custom fields you have defined. Additionally, you can add tags for better categorization and retrieval.

In the Project Resources dashboard, you have several options to manage and customize your view:

1. **Create and Manage Multiple Views**: Access the 'View' dropdown at the top of the dashboard to create a new view, manage existing ones, or clear a view. Only users with admin roles can modify views.
2. **Filter by a Column Value**: Apply filters by selecting the column title icon on columns with filtering enabled, allowing you to narrow down records using specific criteria.
3. **Sort by a Column Value**: Sort records by double-clicking the desired column title, providing both forward and reverse sorting options.
4. **View Activity History**: Review all user activities that modify data by clicking the three dots at the top right of the dashboard and selecting 'Activity History' for detailed logs.

In summary, the Project Resource Planner app simplifies the process of adding and managing resource records, empowering project managers and teams to efficiently handle resources and project timelines through its user-friendly dashboard and powerful management features.