

# Appvibe Project Resource Planner

- [Overview of Features](#)
  - [Key Features](#)
- [Getting Started](#)
  - [Installation](#)
- [Configuration](#)
  - [Setup and Customization](#)
- [Working With Records](#)
  - [Adding and Viewing Records](#)
- [FAQ](#)
  - [FAQ](#)
- [Support](#)
  - [Appvibe Support](#)

# Overview of Features

# Key Features

Appvibe Project Resource Planner serves as an essential tool for project managers, focusing on the efficient allocation of resources, tracking team availability, and managing assignments across multiple projects. By providing a streamlined interface within the Jira ecosystem, it enables teams to maintain oversight and enhance productivity. The integration allows for smooth synchronization of project tasks and resources, thereby supporting the intricate dynamics of team management.

Incorporating customer feedback is crucial for effective resource allocation. By actively gathering input from stakeholders, project managers can prioritize tasks that align with user needs and expectations. Feedback informs decisions that optimize resource utilization, leading to improved project outcomes and enhanced team performance. Leveraging customer insights ensures that projects not only meet deadlines but also deliver value.

- **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 integrating these features, Appvibe Project Resource Planner positions itself as a versatile tool for managing complex projects. This synergy between feedback and resource management fosters a responsive and adaptive project environment, ultimately supporting successful and efficient project delivery.

# Getting Started

# Installation

Project Resource Planner is a powerful application designed to enhance resource management within Jira. Follow these instructions to add it to your Jira instance and begin optimizing your project resources.

## Step 1:

Log in to Jira with administrative privileges to have the necessary access for app installation and management.

## Step 2:

Open the Atlassian Marketplace. In Jira, navigate to **Apps** and click on **Explore more apps** to enter the Marketplace and discover new tools.

## Step 3:

Search for **Appvibe Project Resource Planner** using the search bar to quickly locate the specific app.

## Step 4:

Install the App. Click either **Get app** or **Try it free**, and follow the prompts to confirm the installation. Grant the required permissions to ensure proper functionality.

## Step 5:

Verify the installation by navigating to **Manage Apps** in the Admin section. This step ensures that the app is enabled and ready for use.

Once installed, easily access the Project Resource Planner by finding its link under the **Apps** section in the menu on the left side of your Jira screen.

By following these steps, you can seamlessly integrate the Project Resource Planner app into your Jira instance, enhancing your team's ability to manage resources effectively.

# Configuration

# Setup and Customization

Navigate to the Appvibe Project Resource Planner's configuration and setup by going to **Manage Apps** in Jira, finding the app, and clicking the **Configuration** button. This will direct you to the configuration page where you can manage Roles and Permissions, view and manage System Fields, set up Custom Fields, and configure Conditional Formatting.

## Roles and Permissions

The Appvibe Project Resource Planner app supports three roles:

1. **Admin:** A super role that grants full access to all configuration and setup options.
2. **Editor:** Allows users to update and view Project Resource Planner data.
3. **Viewer:** Permits users to view but not modify any data.

Administrators can assign these roles to any Jira groups. By default, a Jira Administrator has access to the Project Resource Planner configuration screens.

## System Fields

The app includes predefined fields essential for resource planning:

- Resource Name
- Project
- Availability
- Task Assignment
- Start Date
- End Date
- Tags

These serve as the foundational fields needed for the Project Resource Planner.

## Custom Fields

To define additional fields, use the **Add Field Button**. You'll have the following options:

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

- **Field Label:** A descriptive label for the field.
- **Field Type:** Choose from Text, Number, Date, Select, or Multi-Select.
- **Required:** Indicates if this field must be filled out.
- **Sortable:** Determines if the field can be sorted.
- **Filterable:** Allows the field to be used in filters.

## Conditional Formatting

Conditional Formatting lets you style data based on specific criteria. Set up conditions based on field values. When conditions are met, you can modify label colors and highlight styles.

## Summary

The Appvibe Project Resource Planner configuration page enables an efficient setup process through intuitive role assignment, customizable fields, and flexible formatting options. Make sure to adjust these settings to fit your project needs and enhance your resource planning process.



# 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.

# FAQ

# FAQ

**What is the object and purpose of this app?**

The purpose of the app is Resource Allocation. It is designed to help project managers allocate resources, track availability, and manage team assignments across projects.

**What types of feedback can the app track?**

The app supports tracking Project Resources such as Resource Name, Project, Availability, Task Assignment, Start Date, and End Date. 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 "Project Resource Planner," 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

# Appvibe Support

**Overview:**

We are here to help you. The Appvibe Project Resource Planner app simplifies the management and access of Project Resources within Jira. This app assists project managers in allocating resources, tracking availability, and managing team assignments across projects effectively.

**Support Contact:**

If you need further assistance or wish to suggest additional features, please visit our [Support Page](#).