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.