

# Setup and Customization

Navigate to the configuration and setup of the Appvibe Client Project Dashboard through Jira by selecting **Manage Apps**. Locate the Appvibe Client Project Dashboard app and click on the **Configuration** button. This will direct you to the configuration page, where you can manage Roles and Permissions, view System Fields, configure Custom Fields, and set up Conditional Formatting.

## Roles and Permissions

The Appvibe Client Project Dashboard app supports three roles:

1. **Admin**: The super role with complete access, allowing configuration and setup management.
2. **Editor**: Grants full access to update and view Client Project Dashboard data.
3. **Viewer**: Permits viewing but not updating of Client Project Dashboard data.

An administrator can assign these roles to any Jira groups as needed. By default, Jira Administrators have access to Client Project Dashboard configuration screens.

## System Fields

The app includes predefined fields essential for the Client Project Dashboard:

- Task Name
- Client
- Due Date
- Assigned Team
- Progress
- Dependencies
- Tags

These base fields are necessary for effective project management within the dashboard.

## Custom Fields

To define additional fields, select the **Add Field** button. Configure new fields using the following options:

- **Field Key**: A unique key identifier.

- **Field Label:** The display label for the field.
- **Field Type:** Choose from Text, Number, Date, Select, or Multi-Select.
- **Required:** A flag to specify if the field is mandatory.
- **Sortable:** A flag to determine if the field is sortable.
- **Filterable:** A flag to determine if the field is filterable.

## Conditional Formatting

This feature allows data to be formatted based on specified conditions. If conditions are met, labels and highlight colors can be altered to enhance data visualization.

## Summary

The Appvibe Client Project Dashboard app offers robust configuration options tailored to project management needs, including role assignment, field customization, and advanced data formatting. Proper setup ensures that teams have the necessary tools and access to manage projects efficiently within Jira.

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