

Working With Records

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Adding and Viewing Records

Adding records to the Appvibe Employee Performance Tracker is straightforward and can be done at a system, project, or Jira Issue level. To begin, navigate to the Employee Performance dashboard page and click the "Create" button. This action will open a form where you can input various data points related to employee performance.

When adding a record, you can fill in the following fields: Employee Name, Goal, Review Date, Manager Feedback, Rating, and Next Review. Additionally, you can include tags and specify values for any custom fields that have been defined in your setup. This flexibility allows you to tailor records to fit the unique needs of your team or project.

Once records are created, they become accessible within the Employee Performance dashboard, where you can perform several actions to manage and utilize this data effectively.

1. **Create and Manage Multiple Views:** To customize how records are displayed, select the "View" dropdown at the top of the dashboard. Here, you can create new views, manage existing ones, or clear a view. Note that view modifications require admin role permissions.
2. **Filter by a Column Value:** You can filter records by specific column values by clicking the column title icon and entering your criteria. Filtering is only available for columns with enabled filters.
3. **Sort by a Column Value:** For sorting records, click the desired column title and double-click to sort the records in ascending or descending order. This allows for quick reorganization based on specific data points.
4. **View Activity History:** All modifications made by users are tracked and can be reviewed. To access the activity log, click the three dots at the top right of the dashboard and select "Activity History."

Overall, the Appvibe Employee Performance Tracker provides a user-friendly interface to efficiently manage and review employee performance data. The dashboard's capabilities support detailed analysis and better decision-making regarding employee development and assessment.