

# Appvibe Employee Performance Tracker

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# Overview of Features

# Key Features

Appvibe Employee Performance Tracker offers a comprehensive solution designed to track employee performance metrics, capture feedback, and monitor goals all within Jira. With this tool, users gain a central view of each employee's progress and contributions, making it easier to identify strengths and areas for development.

Incorporating customer feedback into employee performance records substantially enhances the accuracy and depth of insights available to managers and team leads. This feedback-driven approach encourages better performance discussions and development plans, ensuring employees stay aligned with organizational goals.

- **Feedback Submission:** Capture feedback seamlessly through Jira issues and dedicated forms, making feedback collection intuitive and efficient.
- **Organized Views:** Use tags, filters, and saved views to sort and prioritize feedback efficiently, ensuring the most relevant information is easy to access.
- **Direct Jira Integration:** Link customer feedback to Jira issues, guaranteeing actionable follow-ups and enhancing team collaboration.
- **Customizable Layout:** Add, remove, or rearrange columns to suit your team's feedback tracking needs, providing flexibility in how information is presented and analyzed.
- **Activity History:** Maintain a clear log of actions and updates made to each feedback record, ensuring transparency and accountability.

In conclusion, Appvibe Employee Performance Tracker streamlines the feedback process, making it easier for teams to evaluate and improve employee performance. By keeping all information centralized in Jira, businesses can leverage customer insights to drive continual growth and success.

# Getting Started

# Installation

Employee Performance Tracker is a powerful tool designed to streamline employee evaluation processes within Jira. Follow these steps to install and access the app efficiently.

## Step 1:

Log in to Jira with Admin privileges. This ensures you have the necessary permissions to install and manage new applications.

## Step 2:

Open the Atlassian Marketplace by clicking on Apps in the Jira navigation. Select Explore more apps to access the Marketplace.

## Step 3:

Search for Appvibe Employee Performance Tracker using the search bar to locate the app in the Marketplace.

## Step 4:

Install the App by clicking on Get app or Try it free. Confirm the installation and grant the necessary permissions as prompted.

## Step 5:

Once the installation is complete, navigate to Manage Apps in the Admin section to verify that the app is enabled.

Upon successful installation, a link to Employee Performance Tracker will appear under the Apps section in the left-side menu for easy access.

With these steps completed, you're ready to leverage Employee Performance Tracker to enhance your team's productivity and streamline performance evaluations directly within Jira.

# Configuration

# Setup and Customization

Navigate to the configuration and setup of the Appvibe Employee Performance Tracker via Jira by accessing **Manage Apps**. Locate the app and click on the **Configuration** button. This action will redirect you to the configuration page, allowing you to set up Roles and Permissions, view System Fields, define Custom Fields, and configure Conditional Formatting for optimized employee performance tracking.

## Roles and Permissions

The Appvibe Employee Performance Tracker offers three user roles:

1. **Admin**
  - Access to all features, including configuration and setup.
2. **Editor**
  - Full access to update and view performance tracking data.
3. **Viewer**
  - Read-only access to view data without editing permissions.

Administrators can assign these roles to any Jira groups. By default, a Jira Administrator has the necessary permissions to access and modify the Employee Performance Tracker configuration screens.

## System Fields

Upon installation, the app provides default fields essential for tracking employee performance:

- **Employee Name**
- **Goal**
- **Review Date**
- **Manager Feedback**
- **Rating**
- **Next Review**
- **Tags**

These fields serve as the foundational data structure for the Employee Performance Tracker.

# Custom Fields

To accommodate specific organizational needs, you can add custom fields. Click on the **Add Field** button to create new fields with the following options:

- **Field Key:** A unique identifier for the field.
- **Field Label:** The display label for the field.
- **Field Type:** Specify the data type (Text, Number, Date, Select, Multi-Select).
- **Required:** Indicate if the field is mandatory.
- **Sortable:** Determine if the field should be sortable.
- **Filterable:** Set if the field should be filterable.

## Conditional Formatting

Conditional Formatting lets you apply visual styles based on data conditions. Define conditions using field values to modify labels and highlight colors when the conditions are met, enhancing data interpretation.

## Summary

The Appvibe Employee Performance Tracker's configuration page provides extensive customization opportunities to tailor the app to match your organizational performance tracking needs. By configuring roles, fields, and conditional formatting, you ensure a comprehensive and adaptable performance management solution.



# Working With Records

# 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.

# FAQ

# FAQ

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

The purpose of the app is for Employee Performance Record. It is designed to track employee performance metrics, feedback, and goals, providing a central view of progress.

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

The app supports tracking Employee Performance with fields like Employee Name, Goal, Review Date, Manager Feedback, Rating, and Next Review. You can also add custom fields for any other related data you wish to track.

**FAQ: 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 named Employee Performance Tracker, click Install, and follow the prompts.

**FAQ: 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 Employee Performance Tracker app makes it easy to manage and access Employee Performance within Jira. The app allows a business to track employee performance metrics, feedback, and goals, providing a central view of progress.

**Support Contact:**

If you need further assistance or want to suggest additional features, you can reach us on our Support Page at <https://www.appvibe.com/support>.