

# 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.

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