

Setup and Customization

Configure and Set Up Appvibe HR Onboarding Tracker

To configure and set up the Appvibe HR Onboarding Tracker, navigate to **Manage Apps** in your Jira instance. Locate the Appvibe HR Onboarding Tracker app, then click on the **Configuration** button. This action will redirect you to the configuration page, where you can adjust Roles and Permissions, review System Fields, set up Custom Fields, and configure Conditional Formatting.

Roles and Permissions

The Appvibe HR Onboarding Tracker app offers three distinct user roles:

1. **Admin:** This super role provides access to all features, including configuration and setup.
2. **Editor:** Allows users full access to update and view HR Onboarding Tracker data.
3. **Viewer:** Grants users viewing rights but restricts them from updating HR Onboarding Tracker data.

Administrators can assign these roles to any Jira groups from this configuration page. By default, Jira Administrators have access to the HR Onboarding Tracker configuration screens.

System Fields

The app comes with predefined fields essential for tracking onboarding tasks. These fields include:

- Employee Name
- Task Type
- Due Date
- Assigned HR Rep
- Completion Status
- Notes
- Tags

These fields serve as the fundamental components required for operating the HR Onboarding Tracker.

Custom Fields

To define additional fields tailored to your needs, use the Custom Fields setup. Click on the **Add Field** button to create a new field, specifying the following options:

- **Field Key:** A unique identifier for the field.
- **Field Label:** Descriptive label for the field key.
- **Field Type:** Choose the data type (Text, Number, Date, Select, Multi-Select).
- **Required:** Flag to indicate if the field must be filled.
- **Sortable:** Flag to determine if the field is sortable.
- **Filterable:** Flag to enable filtering by this field.

Conditional Formatting

Conditional Formatting allows you to apply special formatting to data when specific conditions are met. Set up conditions based on field values, and if these conditions are satisfied, you can adjust labels and highlight colors accordingly.

Summary

In summary, the Appvibe HR Onboarding Tracker provides comprehensive tools for setting roles, defining essential fields, creating custom fields, and applying conditional formatting. These configurable elements ensure adaptability to your organization's specific HR onboarding processes. For any organization using Jira, this app streamlines onboarding

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