

# Setup and Customization

The Appvibe R&D Task Manager is a Jira app designed to streamline the management of R&D tasks within your projects. Configuration and setup of the app is straightforward and involves setting roles and permissions, managing system fields, creating custom fields, and applying conditional formatting.

To access the configuration and setup, navigate to **Manage Apps** in Jira, locate the **Appvibe R&D Task Manager**, and click the **Configuration** button. This will direct you to the configuration page.

## Roles and Permissions

The Appvibe R&D Task Manager supports three roles:

1. **Admin:** This super role grants full access to all features, including configuration and setup options.
2. **Editor:** Allows users to update and view R&D Task Manager data comprehensively.
3. **Viewer:** Permits only viewing of R&D Task Manager data without edit capabilities.

Administrators can assign these roles to any Jira user groups. By default, Jira Administrators have access to all R&D Task Manager configuration screens.

## System Fields

The app provides a set of predefined fields essential for R&D task management. These include:

- Experiment Name
- Objective
- Lead Researcher
- Status
- Start Date
- End Date
- Tags

These are the base fields necessary for effective task management within the Appvibe R&D Task Manager.

## Custom Fields

For additional customization, you can define new fields tailored to your requirements. Click the **Add Field** button to create a new field. Configuration options include:

- **Field Key:** A unique identifier for the field.
- **Field Label:** Descriptive name for the field key.
- **Field Type:** Data type, with options of Text, Number, Date, Select, Multi-Select.
- **Required:** Flag to mandate field completion.
- **Sortable:** Flag to enable field sorting.
- **Filterable:** Flag to enable field filtering.

## Conditional Formatting

Conditional formatting allows you to customize how data is displayed based on specific criteria. You can set conditions based on field values and configure labels and highlight colors when these conditions are met, allowing for clear and immediate visual cues.

## Summary

Appvibe R&D Task Manager's configuration and setup capabilities ensure that the app aligns with your team's workflow and information management needs. By defining roles, managing fields, customizing your data, and enhancing visibility through conditional formatting, you can efficiently oversee and execute R&D tasks within Jira.

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