

Create OKR

Objective and Key Results can be created by clicking a new button in the Hub or Company Goals tab.

OKRify provides 1 single page for creating an objective and its key results.

The screenshot displays the 'Create Objective' and 'Create Key Results' forms. The 'Create Objective' section includes fields for Name, Owner (John Connor), Period (Q4 FY 2021), Ownership (Team), Team (Global Sales), and Parent (Search...). The 'Create Key Results' section shows a table with columns for Name, UOM, Type, Starting Value, Target, Owner, Contributors, Frequency, Deadline, Weight, and Confidence. A row is visible with UOM set to '-None-' and Owner set to John Connor.

Below are details of fields for objective and key results.

Objective Fields

- Name (Required)
- Owner (Required)- User will be responsible for the Objective. Automatically defaults current user, owner can be changed to any active user in Salesforce.
- Period (Required)- Period in which the objective will be targeted for completion. Current period is automatically defaulted, other periods with status current FY, future period or Future FY can also be selected
- Ownership (Required) – Sets the Objective level to Company, team or individual, defaulted to Team level.
- Team (Required for Team and Company Objectives) – For team objectives, the user’s default team is automatically set and for company objectives, the team for the main organization is set. Any active team can be assigned as a team for objectives. Individual objectives do not require a team field.
- Parent (Optional) – Enter parent objective for alignment, it is highly recommended for team and individual objectives.

Key Result Fields

- Name(Required)
- UOM(Required) – Unit for key result. Select the appropriate unit as per requirement. Subject UOM allows automatic key result update based on any Salesforce object. Subject key result requires setting object and filter conditions, please click [here](#) for more details.

- **Type(Required)** – Defaulted to ‘Increase to’ which means the key result progress will increase from starting value to the target. Select ‘Decrease to’ if the key result will decrease from starting value to the target. For Example: Reduce the errors from 10 to 5 in the new product feature.
- **Starting Value (Required for Type- Decrease to)** – Starting value is optional if entered it is assumed the progress for the key result will start from starting value.
- **Target(Required)** – Target value for the key result.
- **Owner(Required)** – Defaulted to Objective’s owner but can be changed to any active user. Key result owner can update progress for the key result.
- **Contributors (Optional)** – Multiple users can be selected as contributors, contributors can also update key result’s progress along with key result’s owner
- **Frequency(Required)** – Frequency for key result’s progress update, it is highly recommended to set frequency to weekly. Frequency is automatically set to Daily for Subject key results as automatic updates happen daily.
- **Deadline(Optional)** – Can be entered if the target end date for a key result is different from the overall objective’s period. If the deadline is entered risk and target progress is calculated based on the deadline otherwise the period’s end date will be used.
- **Weight(Required)**- weight for the key result any value between 1 and 100 can be entered, sum of weights of all the key results should be equal to 100. Weight is used to calculate the progress of an objective based on its key results.
- **Confidence(Required)** – set initial confidence a value from 1 to 5 with 5 being the highest level of confidence to achieve the target set for the key result. Confidence is defaulted to 3.

Key Result Actions

New – Create a new key result line

Delete – Select one or more key results to delete

Clone – Select one or more key results to clone. Clone provides the option to create key results for every member of the team with a single click. Selecting the exclude manager will exclude creating key results for the manager.

Clone for All Team Members

Exclude Manager

Clone Cancel

Subject Update – One Subject key result can be selected for updating key result progress on demand.

Objective Actions

Save – Save Objective in draft status

Save & Activate – Save Objective in active status

Back – Go back to Hub

Pause – Pause objective. Progress updates are not entered and automatic updates are paused.

Close – Close the objective, progress updates are not allowed for closed objectives.

Delete – Delete an objective. All data for objective and its key results are deleted.

Clone – Clone objective and its key results with one click.

Navigate Hub

Hub is the central place to manage OKRs for a user. In the hub the following actions can be carried out

- Create OKR
- Track OKRs

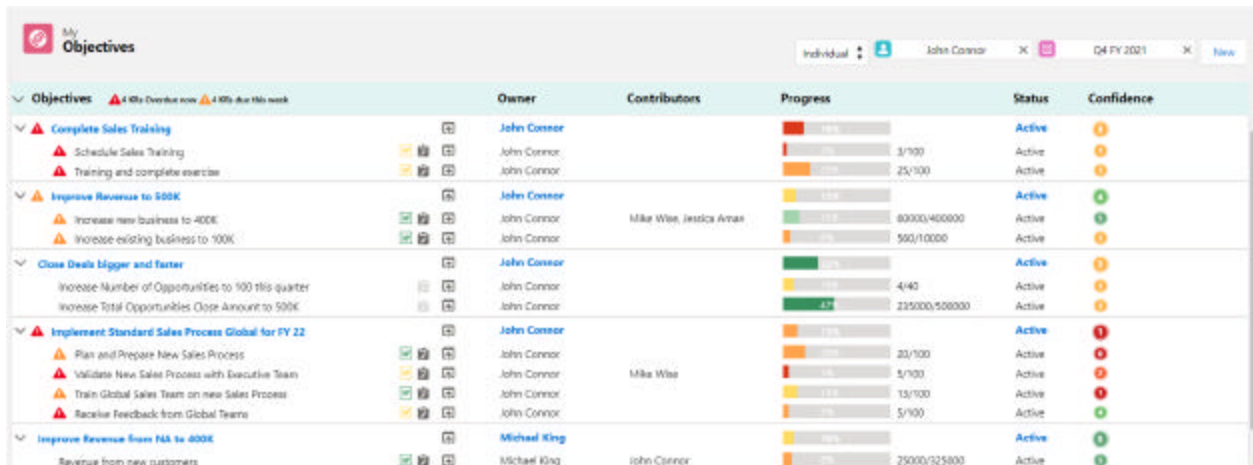
- Update Key Result Progress
- View OKRs for other teams

Hub automatically defaults the team for the user and Current Period. Default team for a user can be set up in the Team tab.

Company Goal tab displays Company level OKRs and navigation is similar to hub.



In hub, Team or Period can be changed to view OKRs for different teams and periods. Team can also be changed to Individual to view all OKRs for the user irrespective of teams, this view will show individual OKR along with all the team OKRs for the user as either owner or contributor.





Here are details on the hub's navigation items


Click Expand Arrow  to view Key Results for an Objective or click the Expand Arrow on the top to expand all the Objectives.

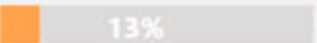
Hub also clearly indicates Key Results that are overdue or due this week for progress update.

▼ Objectives  2 KR's Overdue now  4 KR's due this week

 indicates the update frequency for the Key Result. D – Daily, W – Weekly, M – Monthly, Q – Quarterly, etc is displayed to indicate how often the Key Results progress needs to be updated. The frequency is also color coded by the update score to indicate if the Key Result is updated regularly as per the update frequency set for the Key Result. Red indicates the Key Results are very rarely updated, Yellow indicates the Key Results are not updated regularly as per the update frequency and green indicates the Key Results are updated properly as per the update frequency.

 – Button to open the Key Result Update Screen. This icon will be active only if the user is an owner or a contributor for a Key Result. This icon is also disabled for Subject Key Results as updates are automatic based on a Salesforce object. Hover over the icon for a Key Result to view the reason why the icon is not active.

 – Click to open the Objective/Key Results record page. In this page Salesforce standard tasks or chatter feature can be used. Tasks can be created for an Objective or a Key Result and tracked using the tasks tab. Tasks can be created and assigned to other users. Chatter can also be used to add comments or communicate with a user above Objective or a Key Result.

 – Shows progress and risk for both Objectives and Key Results. There are five possible risks for both Objectives and Key Results – very low risk, low risk, medium risk, high risk and very high risk.

60000/400000 – Shows current value and the target for each Key Result.

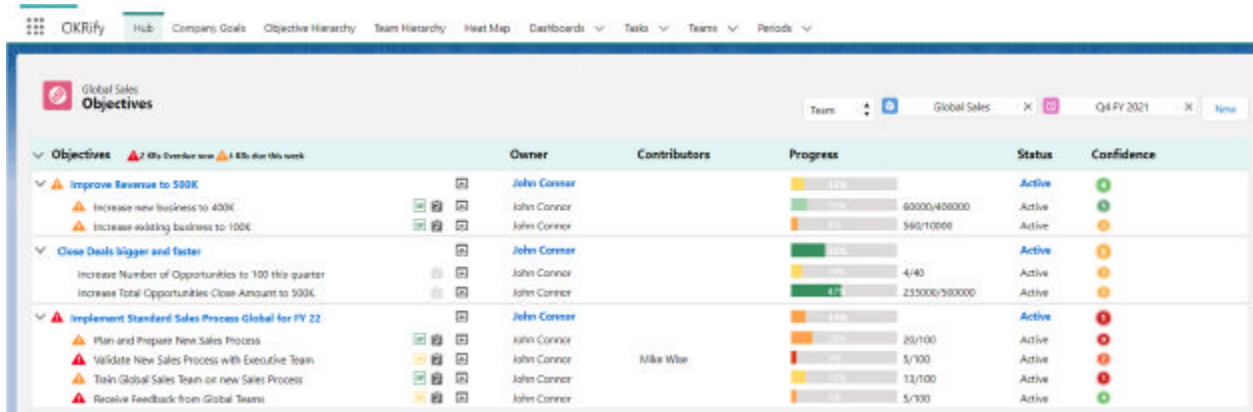
 – Click the new button to create a new OKR

▼  Improve Revenue to 500K – Click an objective to view or edit an OKR

Update Key Result Progress

Updating Key Results progress is critical to tracking how OKRs are progressing. In OKRify, Key Results can be easily updated from the hub for all the Key Results a user is owner or a contributor.

In hub, click  to open the Key Result Update Screen.



Objectives	Owner	Contributors	Progress	Status	Confidence
Improve Revenue to 500K ▲ 2 KR's Overdue now ▲ 1 KR's due this week	John Connor		100%	Active	🟢
▲ Increase new business to 400K	John Connor		100%	Active	🟢
▲ Increase existing business to 100K	John Connor		100%	Active	🟡
Close Deals bigger and faster	John Connor		100%	Active	🟡
▲ Increase Number of Opportunities to 100 this quarter	John Connor		100%	Active	🟡
▲ Increase Total Opportunities Close Amount to 500K	John Connor		47%	Active	🟡
Implement Standard Sales Process Global for FY 22	John Connor	Mike Wae	100%	Active	🔴
▲ Plan and Prepare New Sales Process	John Connor		100%	Active	🔴
▲ Validate New Sales Process with Executive Team	John Connor	Mike Wae	100%	Active	🔴
▲ Train Global Sales Team on new Sales Process	John Connor		100%	Active	🔴
▲ Receive Feedback from Global Teams	John Connor		100%	Active	🟢

In Key Result Update Screen KR Trend Graph and KR history is available to check how the Key Result has progressed until now. In the KR Trend Graph, the Key Result current progress is shown by the blue line, the green dotted line shows the predicted progress based on the KR progress until now and the red dot shows what should be the current progress %.

Increase new business to 400K

KR Trend KR History



* Progress Made

60000

Target Value

400,000

Confidence

0-5

5

Update Date

Oct 18, 2021



Notes

Cancel

Save

Click KR history to see the KR progress updates as a table, the notes entered during the updates are visible on hover over the i icon.

KR Trend **KR History**

UPDATED DATE	PROGRESS VALUE	PROGRESS %	UPDATED BY	NOTES
2021-10-01	10000	2.5	John Connor	
2021-10-02	25000	6.25	John Connor	
2021-10-05	40000	10	John Connor	
2021-10-09	50000	12.5	John Connor	Going well
2021-10-14	60000	15	John Connor	

Enter the current progress value in the Progress Made field, update the confidence with the user's current confidence on reaching the target with 5 the highest confidence and enter the notes for the KR progress update. Click Save to save the update. Progress for Key Result, Objective and Team will be immediately updated when KR progress is saved.

* Progress Made

Confidence 0-5

Notes

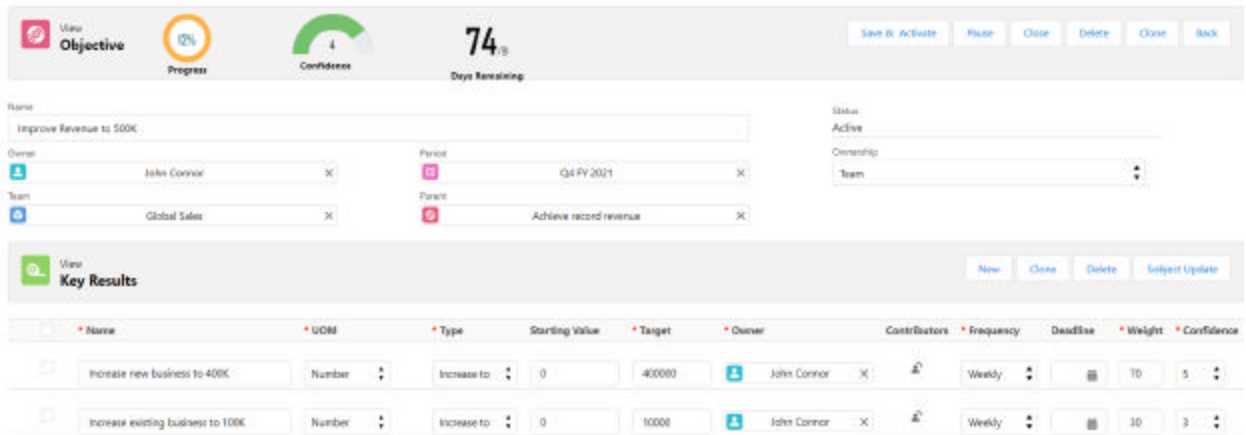
Target Value

Update Date

Add Contributors for Key Results

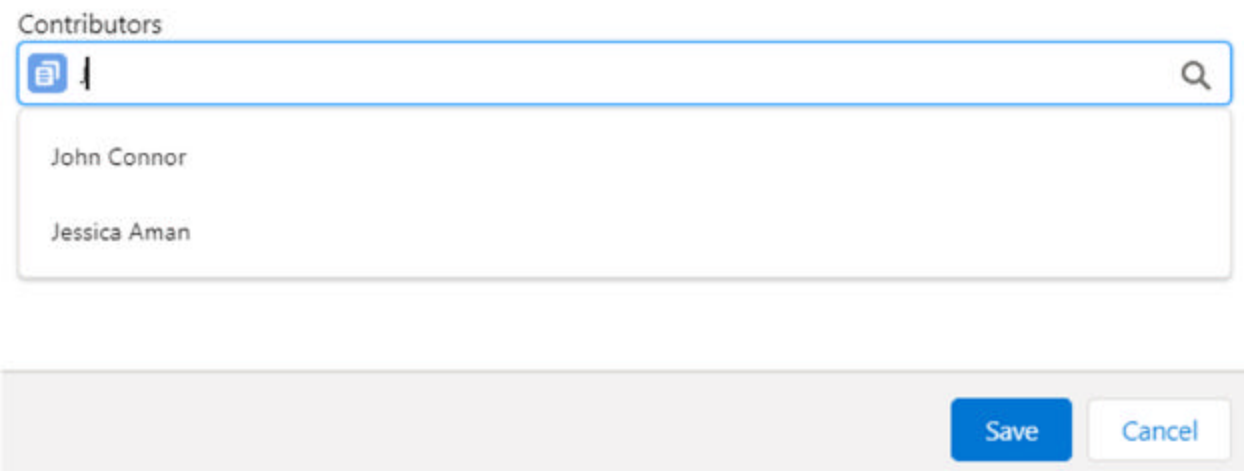
OKRify allows additional users to be added to a Key Result as contributors who can also update the Key Result progress along with the Key Result's owner.

Click  to add contributors to a Key Result.



The screenshot shows the 'Objective' and 'Key Results' management interface. At the top, there are four main indicators: 'Objective' (a red square icon), 'Progress' (a circular progress indicator at 12%), 'Confidence' (a green gauge showing 4), and 'Days Remaining' (74). To the right of these indicators are buttons for 'Save & Activate', 'Pause', 'Close', 'Delete', 'Close', and 'Back'. Below this is a form for the objective: 'Improve Revenue to 500K'. The form includes fields for 'Owner' (John Connor), 'Period' (Q4 FY 2021), 'Team' (Global Sales), 'Parent' (Achieve record revenue), and 'Status' (Active). Below the objective form is the 'Key Results' section, which contains a table with columns: Name, UOM, Type, Starting Value, Target, Owner, Contributors, Frequency, Deadline, Weight, and Confidence. Two key results are listed: 'Increase new business to 400K' and 'Increase existing business to 100K', both with a 'Number' UOM, 'Increase to' type, and 'John Connor' as the owner.

In the contributor pop up screen search for users and click to add multiple users to Key Result as contributors.



The screenshot shows the 'Contributors' pop-up screen. It features a search bar at the top with a magnifying glass icon. Below the search bar, two user names are listed: 'John Connor' and 'Jessica Aman'. At the bottom right of the screen, there are two buttons: 'Save' (a blue button) and 'Cancel' (a white button with a grey border).


Contributors can also be removed by clicking the X sign for a user.







Contributors

Search...

Mike Wise X Jessica Aman X

Save Cancel

If a Key Result has contributors then the  will be in different colors and on hover shows the existing contributors. Click on the icon to add or remove contributors for a Key Result.

* Owner	Contributors	* Frequency	Deadline	* Weight	* Confidence
 John Connor X	 Mike Wise, Jessica Aman	Weekly		70	5
 John Connor X		Weekly		30	3

In Hub, contributors can also be viewed as shown below.

OKRify Hub Company Goals Objective Hierarchy Team Hierarchy Heat Map Dashboards Tasks Teams Periods Create Objective X

Global Sales Objectives

Team: Global Sales X Q4 FY 2021 X New


Objectives	Owner	Contributors	Progress	Status	Confidence
Improve Revenue to 500K	John Connor		100%	Active	3
Increase new business to 400K	John Connor	Mike Wise, Jessica Aman	60000/400000	Active	3
Increase existing business to 100K	John Connor		500/100000	Active	3




Create Subject Key Result

Subject feature in OKRify enables automatic Key Result progress update based on any salesforce standard or custom object. Subject will help reduce the time and effort needed to keep key results updated and also improve the accuracy. Subject Key Results are also easy to create and business users can easily set up in minutes.

An Subject Key Result can be created by selecting Subject in the UOM field of a key result, selecting

Subject will enable the icon  to open the page to set up the details of the Salesforce Object, field and filters needed for automatic key result progress update.



Name	UOM	Type	Starting Value	Target	Owner
Opportunity closed	Subject	Increase to		500000	John Connor

In the Key Result Criteria page enter the following information

- Object – Salesforce Object that needs to be used for Key Result Update
- Aggregate Field – Either count or the field that needs to be aggregated. All the numeric and currency fields of the object will be available for selection
- Filter –
 - Field – All Objects fields will be available
 - Operator – Operator for the filter
 - Value – Value to be compared
- Filter Condition – Conditions for multiple filters

[Click here to see information how to set up a salesforce object for Subject Key Result.](#)

Key Result Criteria

OBJECT Opportunity		AGGREGATE FIELD Amount			
FIELD	OPERATOR	VALUE	ACTION		
Closed	equals	<input checked="" type="checkbox"/>	+		
Close Date	greater or equal	Jul 1, 2021	-		
Close Date	less or equal	Sep 30, 2021	-		

1 AND 2 AND 3

Save Cancel

The above example shows a Subject Key Result for aggregating the amount field for closed opportunities that are closed in the third quarter of 2021.

Subject Key Results are updated automatically daily based on the values from the salesforce object. Subject Key Results can be manually updated similar to other types of key results. Subject key results can be updated on demand by using the Subject Update button in the Objective page.

Example with count

Key Result Criteria

OBJECT Lead		AGGREGATE FIELD COUNT			
FIELD	OPERATOR	VALUE	ACTION		
Lead Source	equals	Web	+		
Created Date	greater or equal	Jul 1, 2021	-		
Created Date	less or equal	Sep 30, 2021	-		
Lead Source	equals	Partner Referral	-		

1 OR 4 AND 2 AND 3

Save Cancel

In the above example, the key result is for the number of leads with source as web or partner referral for the third quarter of 2021.

As the above examples show it is really simple to create a Subject key result and can be set up in minutes which will automatically update.

Related links

- [Create Subject Key Result with complex filters](#)
- [Create OKR](#)
- [Check errors for Subject Key Result Update](#)

Create Subject Key Result with complex filter condition

For information on how to create Subject Key Results click [here](#). Here we will see how a Subject with complex filter conditions can be easily created.

In the below example, the Subject Key Result will automatically track the number of leads based on the condition provided. Subject allows you to create multiple filters and set filter conditions to meet your business requirements.

The screenshot displays a configuration interface for a Subject Key Result. At the top, there are two tabs: 'OBJECT' and 'ADDRESS FIELD'. The 'OBJECT' tab is active, showing a dropdown menu with 'Lead' selected. Below this, there are three main columns: 'FIELD', 'OPERATOR', and 'VALUE'. The 'FIELD' column contains a list of fields: 'Lead Source', 'Created Date', 'Converted Date', 'Country', 'State', and 'Industry'. The 'OPERATOR' column contains a list of operators: 'greater or equal', 'less or equal', 'equal', and 'not equal'. The 'VALUE' column contains a list of values: 'Web', 'Partner Referrals', 'United States', and 'Government'. Each row represents a filter condition. The 'Created Date' and 'Converted Date' rows have a date range selected. The 'Country' row has 'United States' selected. The 'State' row has 'OHIO' selected. The 'Industry' row has 'Government' selected. To the right of each row, there is a plus sign icon and a trash can icon. At the bottom of the interface, there is a text input field containing the logical condition '(1 OR 4) AND 2 AND 3 AND 5 AND 6 AND 7 OR 8 AND 9'. There are 'Save' and 'Cancel' buttons at the bottom right.

Filter conditions can have AND or OR logical conditions as shown above. As shown above, all the fields in the object are available to set up filters. In the above examples, lead from sources web and partner referrals that are created and converted in third quarter of 2021 from United States or

Canada and from any industry other than Government are automatically aggregated and updated daily as the Key Result progress.

Another complex example,

FIELD	OPERATOR	VALUE	ACTION
Stage	equals	Negotiation/Review	+
Stage	equals	Propose/Price Quote	+
Stage	equals	Value Proposition	+
Created Date	greater or equal	Jul 1, 2021	+
Created Date	less or equal	Jul 31, 2021	+
Lead Source	equals	Web	+
Lead Source	equals	Phone Inquiry	+
Probability (%)	greater than	60	+

(1 OR 2 OR 3) AND 4 AND 5 AND (6 or 7) AND 8

Save Cancel

In the above example, the opportunity amount is aggregated for the Key Result and updated automatically daily. As per the conditions, opportunities in stages Negotiation Review, Propose/Price Quote, Value Proposition created in July 2021 from Lead source from Web or Phone Inquiry with probability % greater than 60 is considered and the amount field from these opportunities are summed and tracked in the Key Result.

Update Subject Key Results Ondemand

Subject Key Results helps to reduce the manual effort required for updating a Key Result's progress. Subject Key Results are updated periodically by a batch program which can be scheduled to run as per your organization's needs. Additionally OKRify also provides the ability for a user to update a Subject Key Result ondemand if there is a need to update the Key Result progress.

To update an Subject Key Result ondemand

- Go to hub and click on an Objective to go to the Edit/View Objective page

Objectives	Owner	Contributors	Progress	Status	Confidence
Increase Leads and Close Ratio with new Marketing ... Increase Number of leads to 100 Deal Size to 25k	John Connor		0/100	Active	3
	John Connor		0/100	Active	3
	John Connor		29/100	Active	3

- Select the Subject Key Result for which progress needs to be updated and click subject update.

View Objective | Progress: 42% | Confidence: 3 | Days Remaining: 1/31

Save & Activate | Pause | Close | Delete | Clone | Back

Name: Increase Leads and Close Ratio with new Marketing Campaign

Status: Active

Owner: John Connor | Period: Q4 FY 21 | Ownership: Team

Team: Brand Marketing | Parent: Search...

View Key Results | New | Clone | Delete | Subject Update

Name	UOM	Type	Starting Value	Target	Owner	Contributors	Frequency	Deadline	Weight	Confidence
Increase Number of leads	Subject	Increase	0	100	John Connor		Weekly	30	3	

- Key Result progress program will be initiated and Subject Key Result will be updated in few minutes by a background task

View Objective | Progress: 42% | Confidence: 3 | Days Remaining: 1/31

Success: Key Result Progress Update Job is Initiated

Save & Activate | Pause | Close | Delete | Clone | Back

Name: Increase Leads and Close Ratio with new Marketing Campaign

Status: Active

Owner: John Connor | Period: Q4 FY 21 | Ownership: Team

Team: Brand Marketing | Parent: Search...

View Key Results | New | Clone | Delete | Subject Update

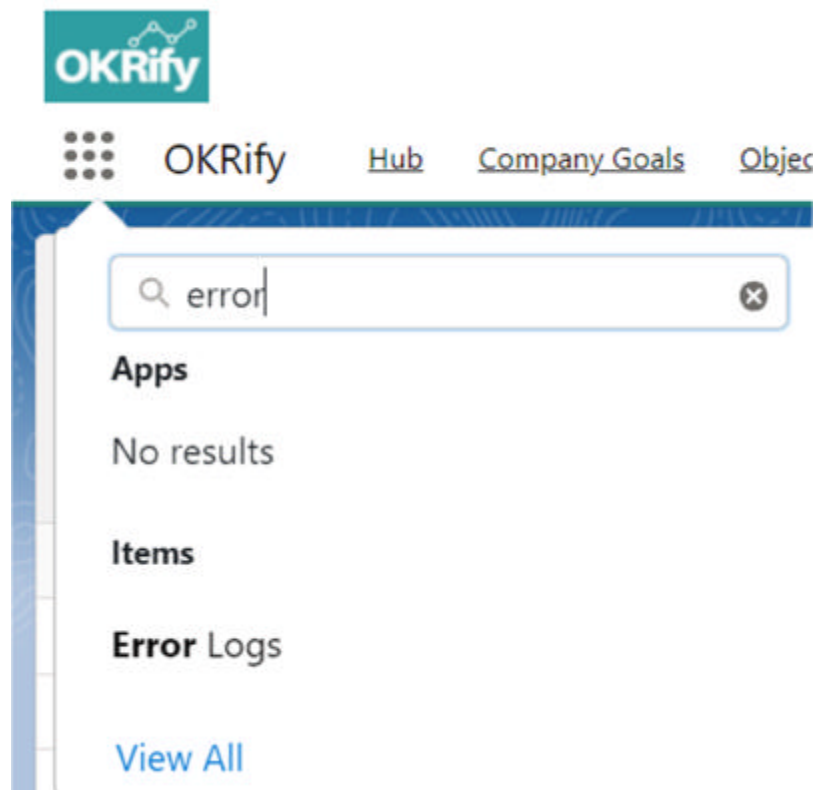
Name	UOM	Type	Starting Value	Target	Owner	Contributors	Frequency	Deadline	Weight	Confidence
Increase Number of leads	Subject	Increase	0	100	John Connor		Weekly	30	3	

Check the updated progress in Hub. If there are errors in the Key Result information page as shown here.

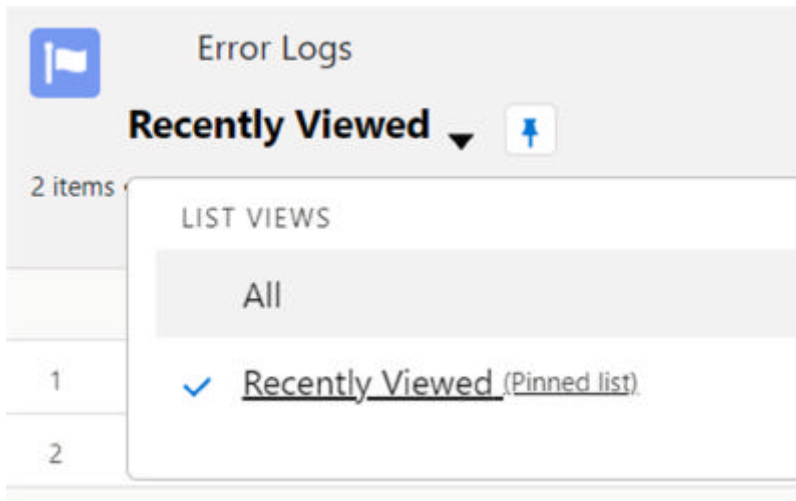
Check Subject Error Logs

Subject Key Results are updated automatically daily using a background program, in case of errors the errors are saved in an error log. Error log provides details of the error and the key results for which there are errors.

This error log can be accessed by clicking icon  and searching for Error Logs in all tabs.



Click Error Logs. Click the drop down icon next to Recently Viewed and click All to see the all the errors.



Click an error to see the details of the errors.

Error Log Name	Created By	Error Source	Key Result	Created Date
Err-0319	Chandra S	TargetsObjectBatch	Lookup + Filter	1/27/2021, 12:31 AM
Err-0313	Chandra S	TargetsObjectBatch	Lookup + Filter	1/27/2021, 12:29 AM
Err-0332	John Connor	TargetsObjectBatch	Lookup + Filter	1/24/2021, 1:19 AM
Err-0311	John Connor	TargetsObjectBatch	Lookup	1/24/2021, 1:18 AM
Err-0310	John Connor	TargetsObjectBatch	Recurring revenue by 1M	1/19/2021, 9:13 AM
Err-0309	John Connor	TargetsObjectBatch	KR Lookup fields	1/15/2021, 8:02 AM
Err-0308	John Connor	TargetsObjectBatch	KR Lookup fields	1/15/2021, 8:01 AM
Err-0307	John Connor	TargetsObjectBatch	KR Lookup fields	1/15/2021, 7:57 AM
Err-0306	John Connor	TargetsObjectBatch	KR Lookup fields	1/15/2021, 7:57 AM
Err-0305	John Connor	TargetsObjectBatch	KR Lookup fields	1/15/2021, 7:56 AM

Error log shows the Error Message and the Key Result for which the error was logged.

Error Log Err-0310 [Sharing Hierarchy](#)

Details

Error Log Name: Err-0310

Key Result: [Recurring revenue by 1M](#)

Error Message: expecting a colon, found 'a075w0000aNs9AAK' Line Number: 157

Error Source: TargetsObjectBatch

Created By: [John Connor](#), 1/19/2021, 9:13 AM

Owner: [John Connor](#)

Last Modified By: [John Connor](#), 1/19/2021, 9:13 AM

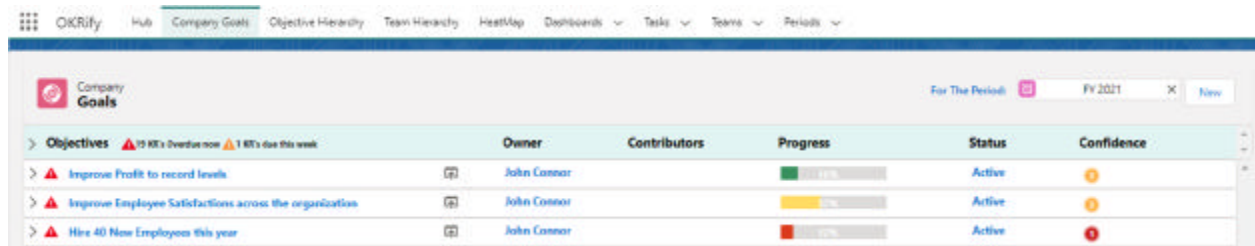
Contact your administrator or support@okrify.com in case of errors.

View Company Goals

One of the key principles of the OKR framework is to align everyone to the Company's vision. OKRify enables this by providing a separate tab from company goals that is available to everyone with access to OKRify. Company tab works very similar to hub but only displays Company level objectives. Only owners or contributors for the company goals can edit an objective or update key result progress similar to hub.

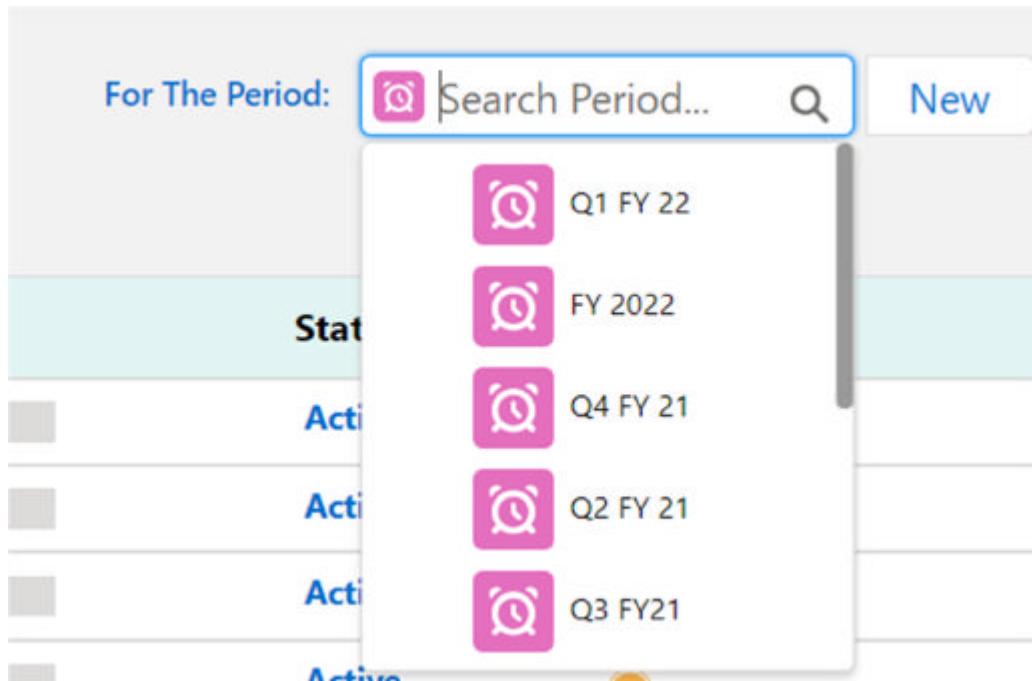
To view company goals

- Go to Company Goals Tab, all the company goals for the default period selected will be visible, the default period can be changed to other periods to view Company Goals for that period.



Objectives	Owner	Contributors	Progress	Status	Confidence
> Improve Profit to record levels	John Connor		100%	Active	3
> Improve Employee Satisfaction across the organization	John Connor		50%	Active	3
> Hire 40 New Employees this year	John Connor		0%	Active	1

- Default period is set in the custom settings for Company goals tab, default period can be set to Current FY or Current Period, click here for instructions. Click 'X' in the period field to remove the default period and select the period to view Company Goals for the selected period.



- Company Goals works similar to Hub for Company OKRs, Key Result progress for company goals can be updated in hub or click on an objective to go to the edit/view objective page.

The image shows the 'Company Goals' dashboard. At the top, there is a header with the company logo and the text 'Company Goals'. Below the header, there is a summary bar with 'Objectives', '19 KR's Overdue now', and '1 KR's due this week'. The main content is a table with the following columns: Objectives, Owner, Contributors, and Progress.

Objectives	Owner	Contributors	Progress
<ul style="list-style-type: none"> ▲ Improve Profit to record levels ▲ Achieve Record Pre-Tax Profit ▲ Achieve Record Sales for 2021 ▲ Achieve Record Gross Margin in 2021 ▲ Achieve Record Sales for 2021 cl 	John Connor	Ram Ram	16%
	John Connor	Ram Ram	27%
	John Connor	Ram Ram	0%
	John Connor	Ram Ram	0%

Create Company Goals

Company level Objectives/Goals are important to set direction for everyone in an organization, setting company goals help to align the whole organization behind common goals.

Company goals can be created similar to team or individual objectives in OKRify, it can be created by clicking the 'New' button in Hub or Company Goals.

- In the Create Objective screen, Select Company as the Ownership which will automatically default the team field to your company level team.

The screenshot shows the 'Create Objective' interface. At the top left is the 'Create Objective' header with a red circular icon. In the top right corner, there are three buttons: 'Save', 'Save & Activate', and 'Back'. Below the header is a 'Name' input field. Underneath are six fields arranged in two rows. The first row contains 'Owner' (John Connor), 'Period' (Q4 FY 21), and 'Ownership' (Company). The second row contains 'Team' (OKRify) and 'Parent' (Search...). Each field has a small 'x' icon for removal or a search icon for the Parent field.

- Change Period if required, Period defaults to Current Period.

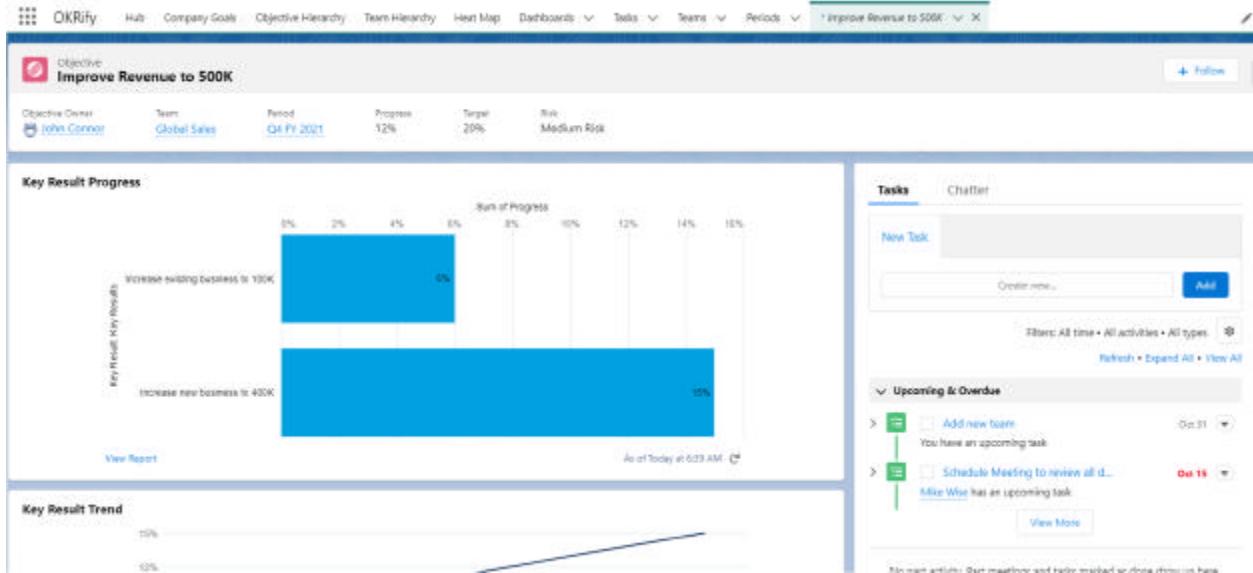
This screenshot is similar to the previous one but shows the 'Period' field updated to 'FY 2022'. The other fields (Owner: John Connor, Ownership: Company, Team: OKRify, Parent: Search...) remain the same.

- Enter key results similar to any other objective. [Click here for more information.](#)

Create tasks for Objectives or Key Results

Salesforce tasks can be created for an objective or a key result in OKRify. Tasks will help to keep track of activities that need to be carried out for an objective or key result. Tasks created can be tracked in the Tasks tab or Objective/Key Result record pages.

Click View Objective/Key Result icon from the hub to go to the objective or key result record page, in the record page tasks can be created and tracked for an objective or key result.




All the upcoming and overdue tasks can be viewed and a new task can be created by clicking 'Create New' button.

Tasks

Chatter


New Task


Create new... [Add](#)

Filters: All time • All activities • All types 

[Refresh](#) • [Expand All](#) • [View All](#)

▼ **Upcoming & Overdue**

>  [Add new team](#) Oct 31 ▼
You have an upcoming task

>  [Schedule Meeting to review all d...](#) **Oct 15** ▼
[Mike Wise](#) has an upcoming task

[View More](#)

To create a new task enter the following information and click save to create a new task.

- Subject
- Due Date
- Assigned to
- Status

Tasks

Chatter

New Task

Subject

Schedule meeting with regional leaders



Due Date

10/22/2021



Name



Search Contacts...



Related To



Improve Revenue to 500K



* Assigned To



John Connor



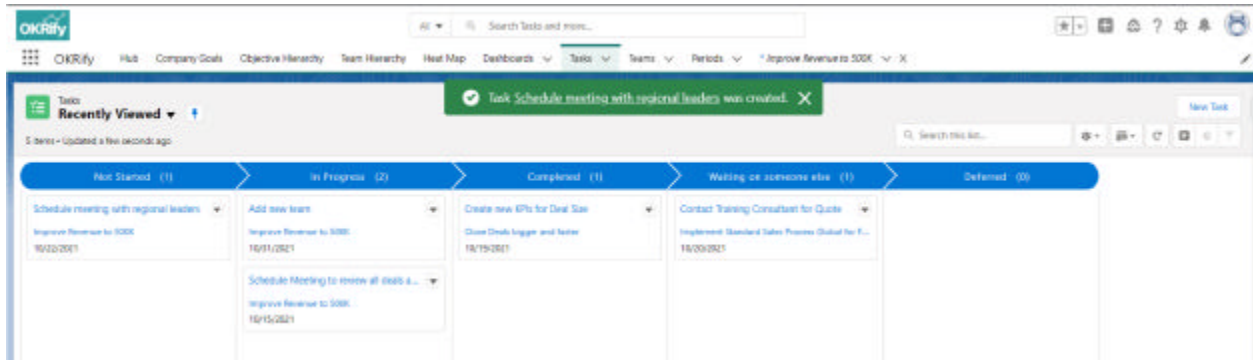
* Status

Not Started




Save

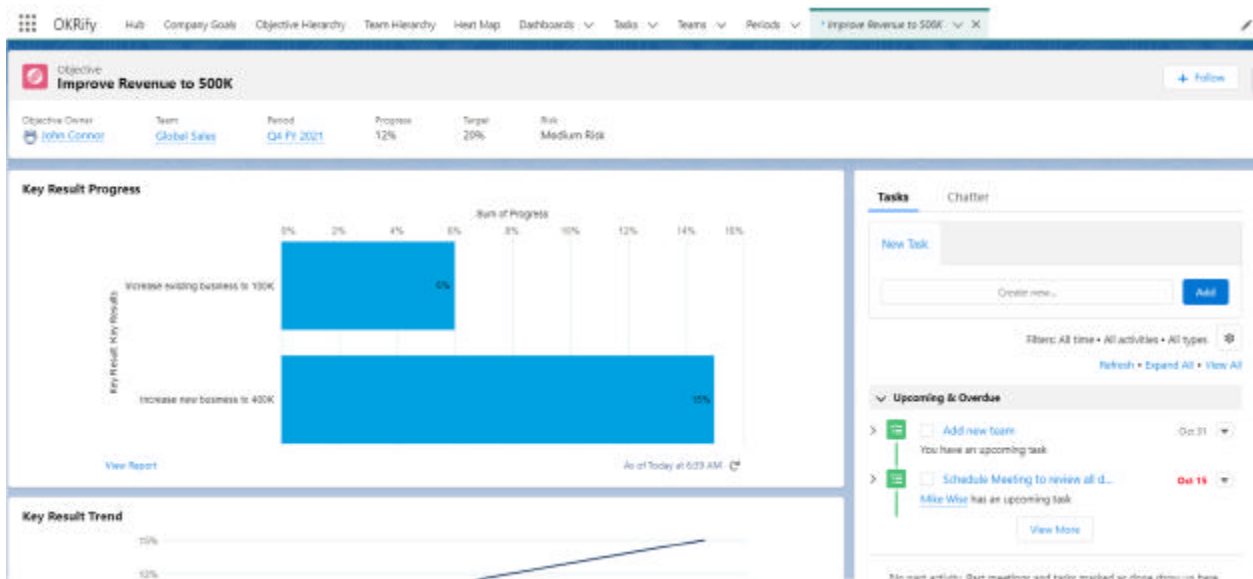
Tasks created are also visible in the Tasks tab and status can be easily updated by dragging the tasks from one column to another. (Tasks is tab for standard Salesforce tasks object)



Use Chatter for Objectives or Key Results

The Salesforce Chatter feature can be used with Objectives and Key Results in OKRify.

Click  View Objective/Key Result icon from the hub to go to the objective or key result record page, in the record page go to Chatter Tab next to Tasks to use Chatter feature for an objective or key result.



In the Chatter tab, existing chatter messages can be seen. Comments can be added to existing messages or new messages can be added by clicking the button 'Share an update'.

Tasks

Chatter

Post

Share an update...

Share



Search this feed...



[Schedule meeting with regional leaders](#) — [John Connor](#) created a task.

1m ago



Schedule meeting with regional leaders

[View more details](#)

1 view



Like

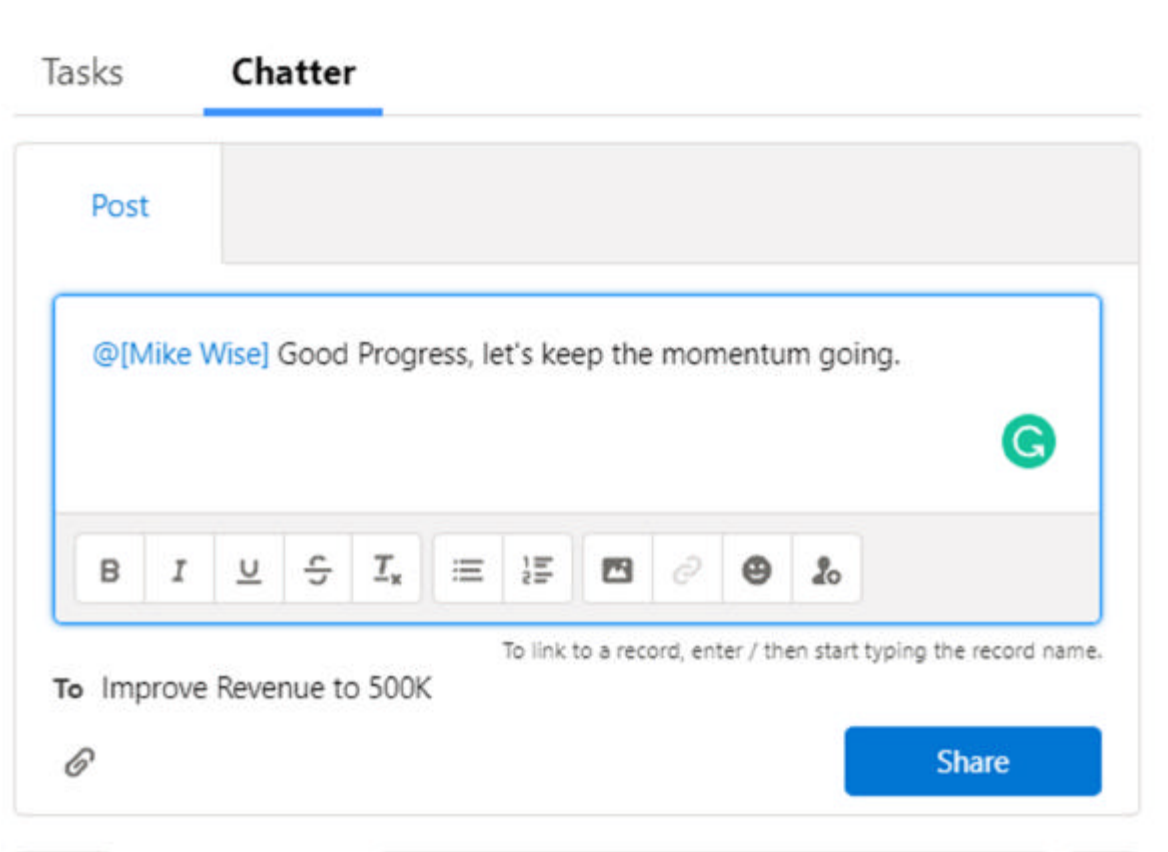


Comment



Write a comment...

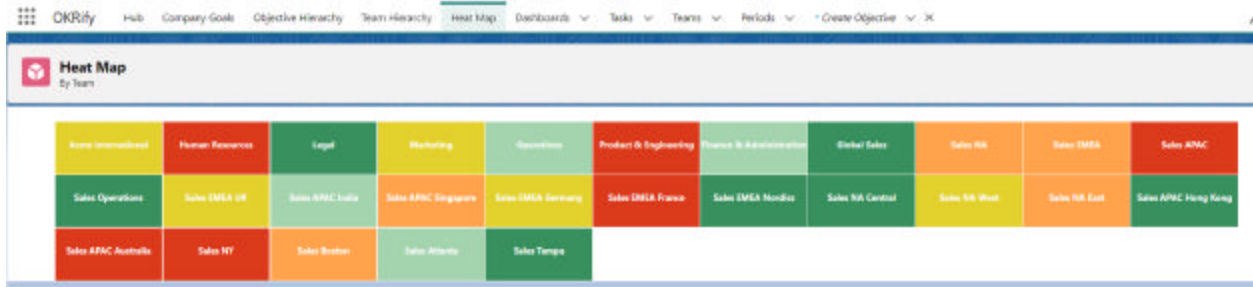
Enter the message, users can also be tagged in the Chatter message and post the message. This message will appear in the user's chatter messages along with the Objective/Key Result view page.



Navigate Heatmap

Heatmap provides a quick overview of how teams are progressing on OKRs for the current period. The teams are colored based on the risk calculated for each team based on current progress compared to the target progress calculated based on the remaining time. Teams are ordered based on the levels. There are five possible risk levels – very low risk, low risk, medium risk, high risk and very high risk.

It is important every team except the team for the organization(Example: Acme International) should have a parent team to build the team hierarchy and order.



Clicking a team will open the hub for the selected team and display the OKRs for the team for the current period.

Navigate Objective Hierarchy

Objective hierarchy shows how team and individual objectives are aligned with company goals, all objectives that are aligned to the company level objectives or an objective aligned to the company level objectives are shown in Objective hierarchy.

Any objectives that are not aligned directly or indirectly with any company goals are not shown in the Objective hierarchy. All objectives are shown in the team hierarchy under each team.

Objective hierarchy by default displays all the company level objectives for the current period and current FY. Each objective's name and progress % are displayed and colored based on the objective's risk level, also the objective's team, Owner and Period are also shown for each objective.

OKRify Hub Company Goals **Objective Hierarchy** Team Hierarchy

Objective Hierarchy

+

-

+

Improve Company Culture 60% Acme International (John Connor) Period: FY 2021
Achieve record revenue 37% Acme International (John Connor) Period: FY 2021
Improve Customer Satisfaction and delight customers 64% Acme International (John Connor) Period: FY 2021

Next level of objectives can be viewed by clicking the expand button for each objective. Expand and Collapse icons can be used to view different levels of objectives aligned to the company objectives.

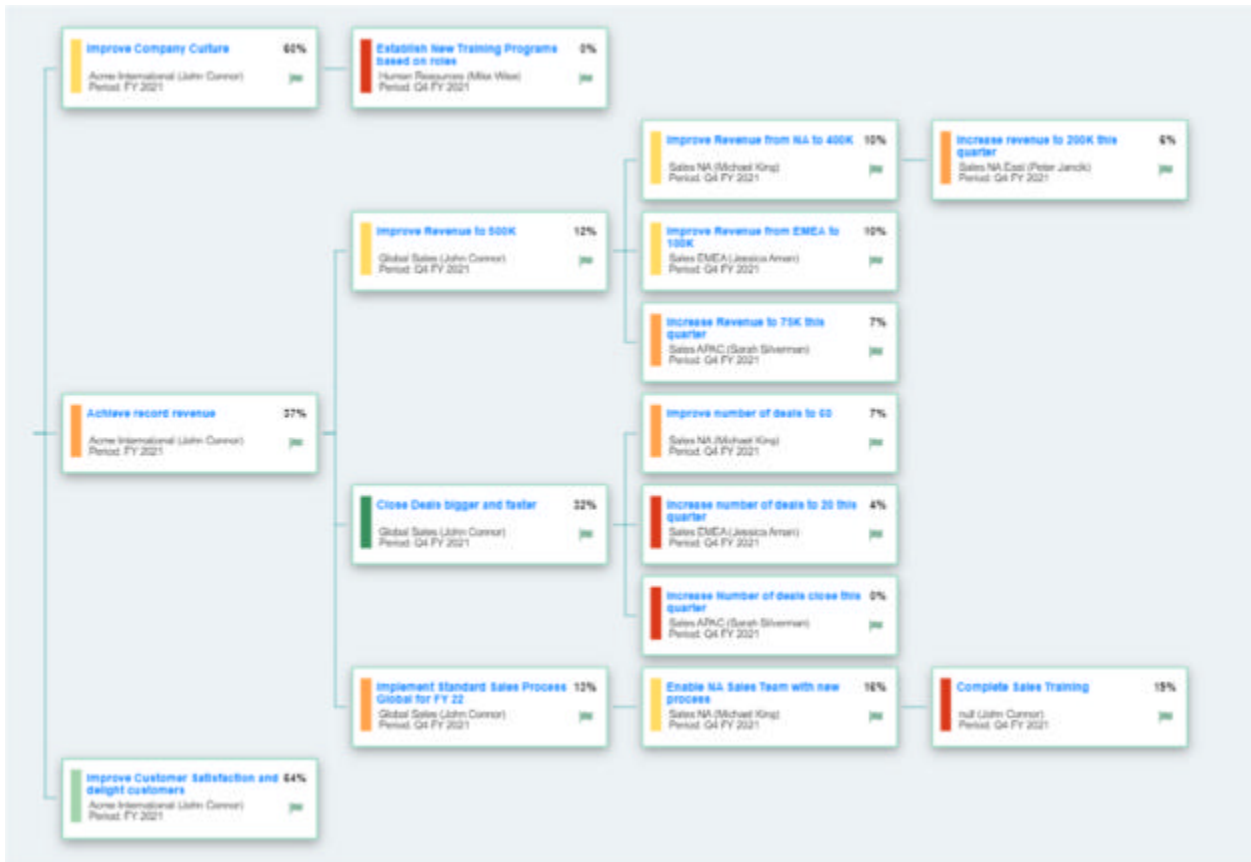
Close Deals bigger and faster 32% Global Sales (John Connor) Period: Q4 FY 2021	➔
--	---

Achieve record revenue 37% Acme International (John Connor) Period: FY 2021
--

Improve Revenue to 500K 12% Global Sales (John Connor) Period: Q4 FY 2021
Close Deals bigger and faster 32% Global Sales (John Connor) Period: Q4 FY 2021
Implement Standard Sales Process 13% Global for FY 22 Global Sales (John Connor) Period: Q4 FY 2021



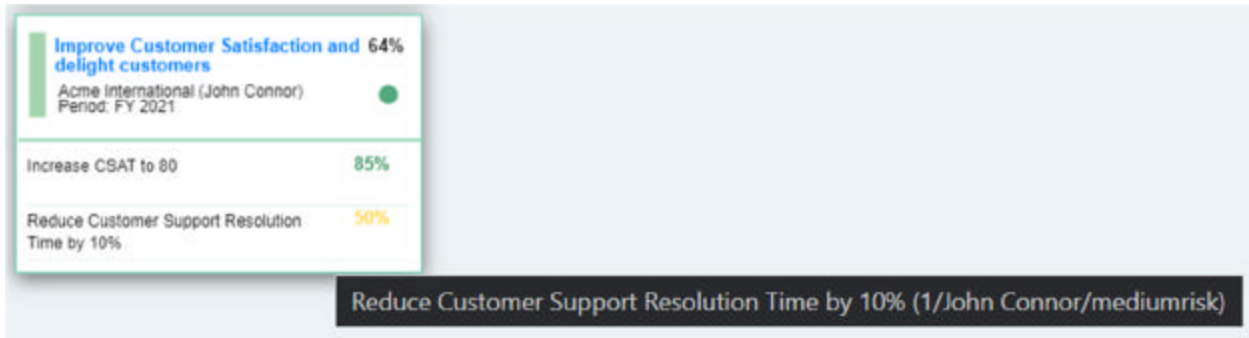
Expand All Button will expand all levels of objectives. Zoom in and Zoom out buttons are also available.



🚩 – Click this button to view Key Result for an Objective. Key Results for multiple objectives can be opened at the same time.



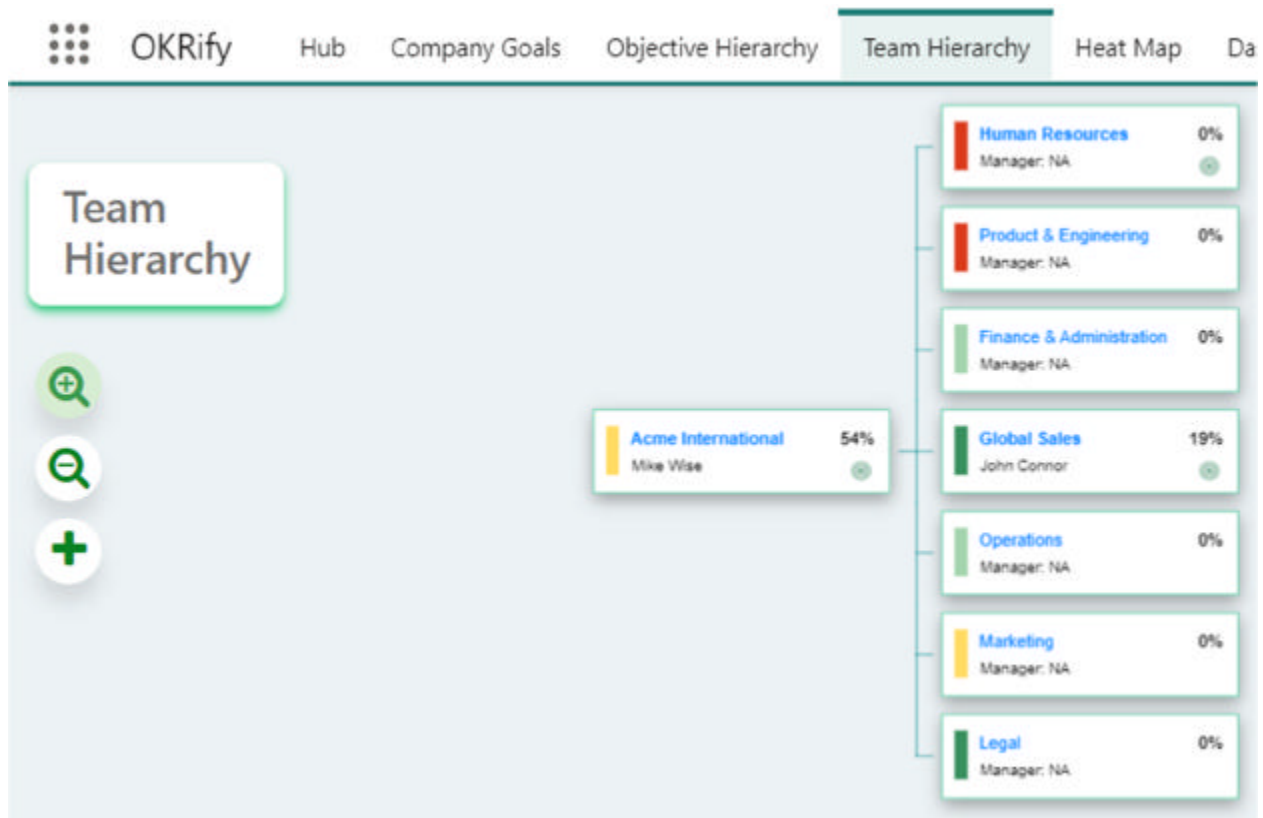
Hovering over a Key Result will display Confidence, Owner and Risk for the Key Result.



Navigate Team Hierarchy

Team hierarchy can be used to view the team organization structure, team alignments, team okr progress and objectives for each team and its progress. All teams except the team for the main organization should have a parent team.

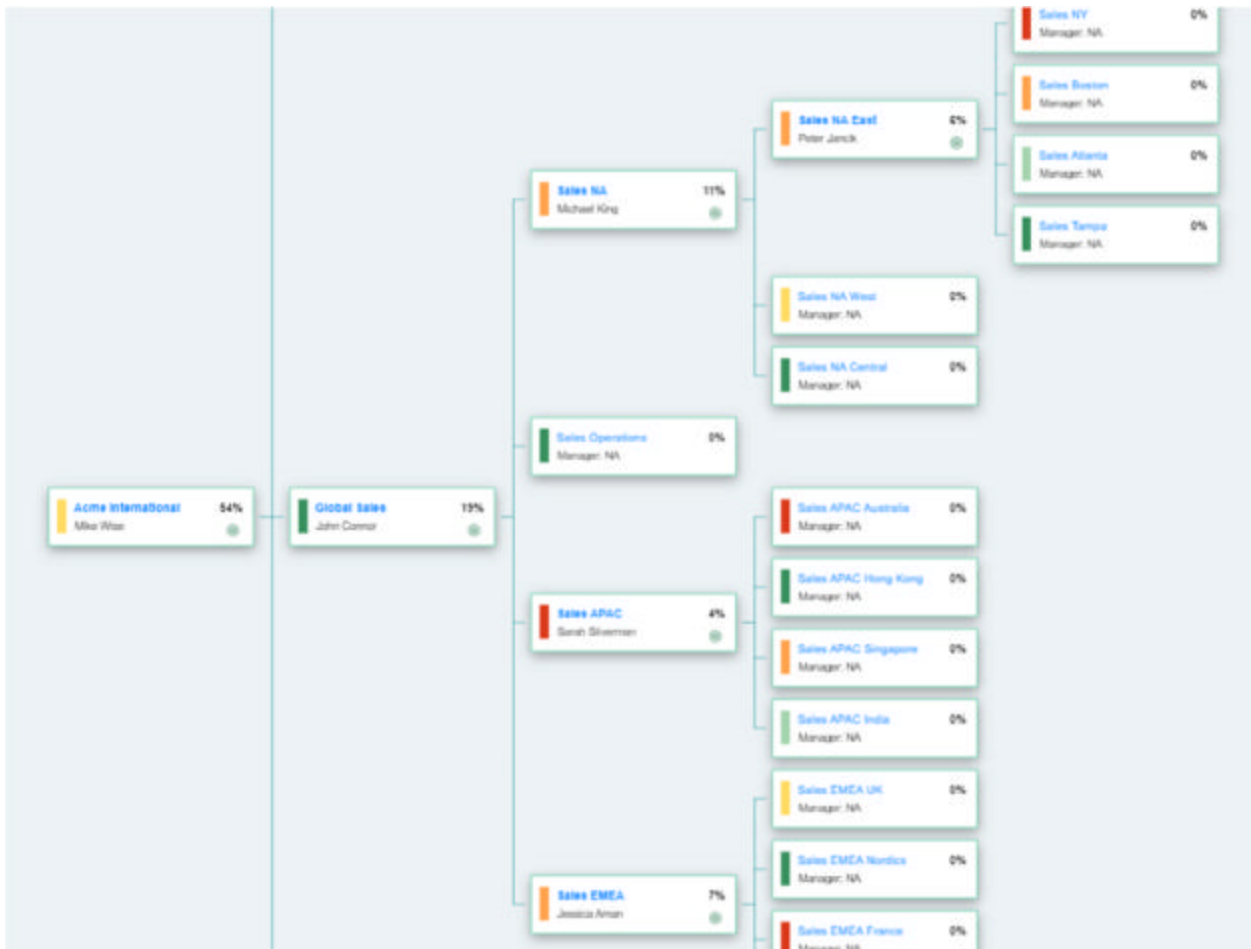
Team hierarchy by default displays the main team for the organization and the next level of teams that are aligned with the main organization. Each team's name and progress % are displayed and colored based on the team's risk level, also the team's manager is also shown for each team.




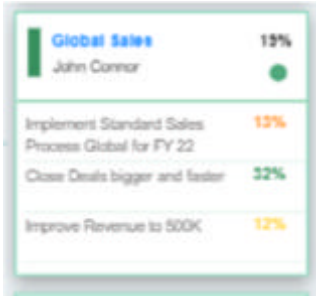
Next level of teams can be viewed by clicking the expand button for each team. Expand and Collapse icons can be used to view different levels of teams.



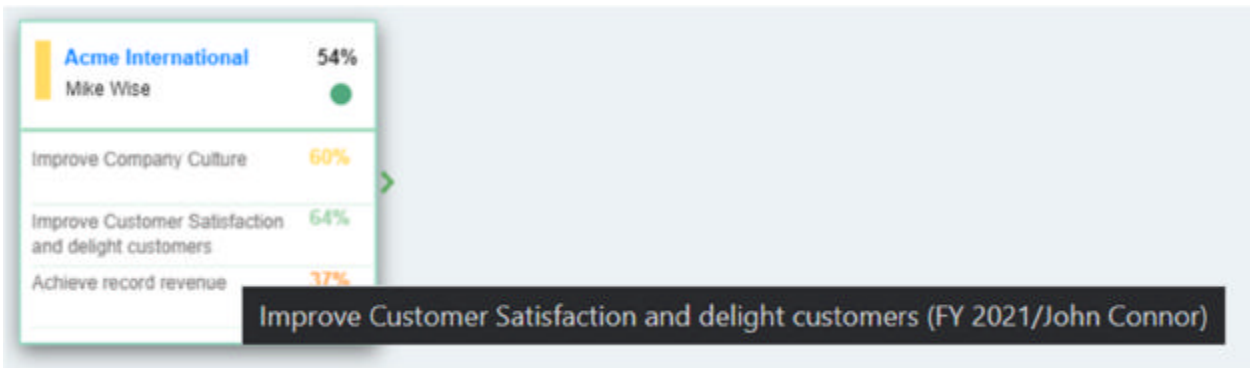
Expand All Button will expand all team levels with one click. Zoom in and Zoom out buttons are also available.



 – Click this button to view objectives for a team. Objectives for multiple teams can be opened at the same time to check how objectives are aligned and how they are progressing.



Hovering over an objective will display period and owner for the objective.



Clone OKR

OKRify provides the ability to clone both objective and its key result with a single click. This will reduce the time taken to set up OKRs if the same OKRs are extended beyond a period or OKRs are similar for two teams or individuals.

To clone an objective and its key result,

1. Go to the Edit/View Objective page by clicking on an objective from Hub or Company Goals.

View Objective

Progress: 15% | Confidence: 3 | Days Remaining: 1/31

Name: Improve Profit to record levels

Status: Active

Owner: John Connor | Period: FY 2021 | Ownership: Company

Team: OKRify | Parent: Search...

View Key Results

Name	UOM	Type	Starting Value	Target	Owner	Contributors	Frequency	Deadline	Weight	Confidence
Achieve Record Sales for 2021	Number	Increase	0	1000000	John Connor		Monthly		10	3

- Click Clone button to create a new Objective along with they key result

Create Objective

Clone Objective Cloned successfully

Name: Clone Of Improve Profit to record levels

Owner: John Connor | Period: Search... | Ownership: Company

Team: OKRify | Parent: Search...

- Change Name field, enter Period and update Team, Owner, Parent, Key Results, etc and Save the new objective and its key results.

Create Objective

Name: Improve Profit to record levels

Owner: John Connor | Period: Q1 FY 22 | Ownership: Team

Team: Employee Relations | Parent: Build And Maintain A Presence On Social Media Channels To E...

Create Key Results

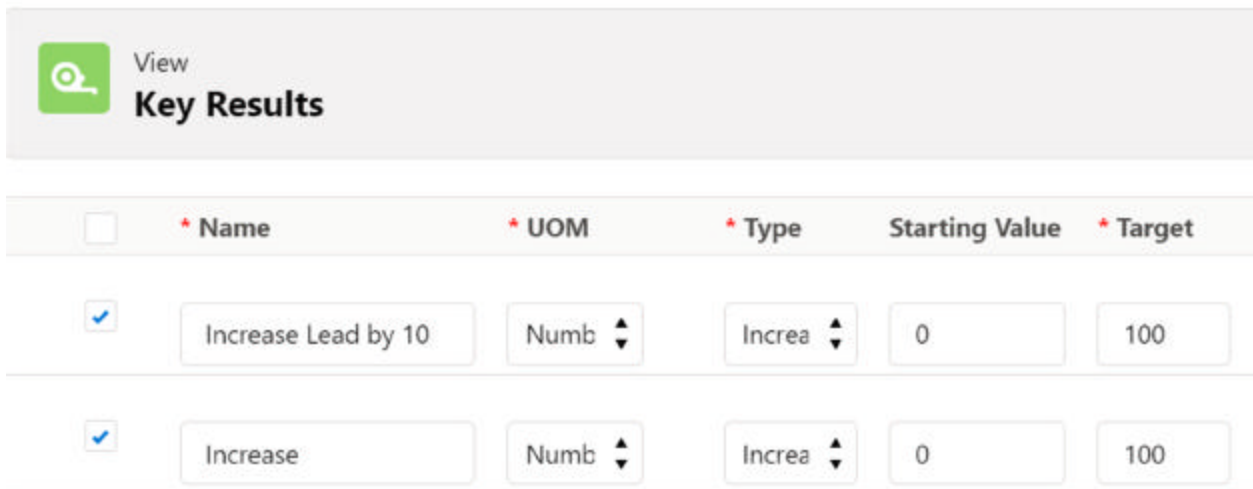
Name	UOM	Type	Starting Value	Target	Owner	Contributors	Frequency	Deadline	Weight	Confidence
Achieve Record Sales for 2021	Number	Increase	0	1000000	John Connor		Monthly		10	3
Achieve Record Sales for 2021	Number	Increase	0	1000000	John Connor		Monthly		20	3

Clone Key Result

OKRify provides the ability to clone key results when creating an OKR and save manual effort required for similar key results in an objective.

To clone one or more key result in the create or edit objective page

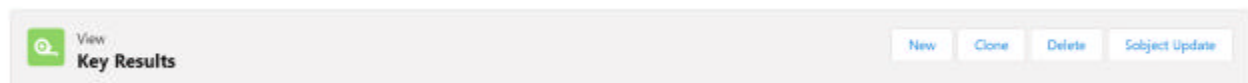
- Select the key results that needs to be cloned



The screenshot shows a 'View Key Results' interface. At the top left, there is a green magnifying glass icon and the text 'View Key Results'. Below this is a table with the following columns: Name, UOM, Type, Starting Value, and Target. The first row has a checked checkbox, 'Increase Lead by 10', 'Numb', 'Increa', '0', and '100'. The second row has a checked checkbox, 'Increase', 'Numb', 'Increa', '0', and '100'.

<input type="checkbox"/>	* Name	* UOM	* Type	Starting Value	* Target
<input checked="" type="checkbox"/>	Increase Lead by 10	Numb	Increa	0	100
<input checked="" type="checkbox"/>	Increase	Numb	Increa	0	100

- Click clone button



The screenshot shows the 'View Key Results' interface with a toolbar at the top right containing buttons for 'New', 'Clone', 'Delete', and 'Subject Update'.

- If the same key result has to be cloned for all team members then select “Clone for All Team Members” if not just click clone. Selecting “Exclude Manager” clones for all team members except manager.

The image shows a dialog box with a white background and a grey border. Inside the dialog, there is a white rounded rectangle containing two checkboxes. The first checkbox is checked and is followed by the text "Clone for All Team Members". The second checkbox is unchecked and is followed by the text "Exclude Manager". Below this rectangle, there is a grey bar containing two buttons: a blue button with the text "Clone" and a white button with the text "Cancel".

- Select Key Result will be cloned.

Pause and Unpause OKR

Sometimes OKRs need to be paused to review the objective or for a change in the direction, OKRify provides the ability to pause an active objective. Key Result progress cannot be updated for a paused objective. Paused objectives can be unpaused which will enable key result progress updates.

To pause an objective and its key result,

- Go to the Edit/View Objective page by clicking on an objective from Hub or Company Goals.

View Objective

Progress: 15% | Confidence: 3 | Days Remaining: 1/31

Name: Improve Profit to record levels

Owner: John Connor | Period: FY 2021

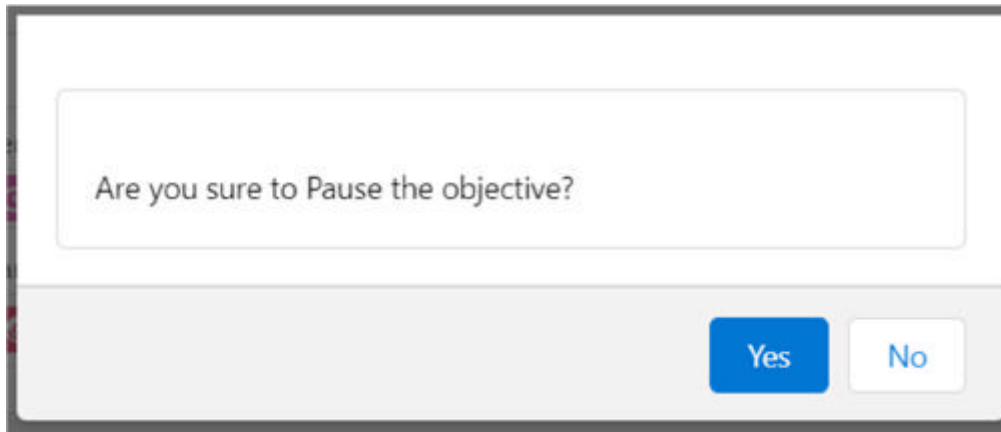
Team: OKRify | Parent: Search...

Status: Active

Ownership: Company

Name	UDM	Type	Starting Value	Target	Owner	Contributors	Frequency	Deadline	Weight	Confidence
Achieve Record Sales for 2021	Number	Increase	0	1000000	John Connor		Monthly		10	3

- Click the Pause button and confirm by clicking Yes in the popup confirmation.



- Once the objective is paused, the status field is set to Paused and in hub or Company Goals, progress cannot be updated for key results of paused objectives.

View Objective

Progress: 37% | Confidence: 3 | Days Remaining: 1/31

Name: Improve Employee Satisfactions across the organization

Owner: John Connor | Period: FY 2021

Team: OKRify | Parent: Search...

Status: Paused

Ownership: Company

- Now the Unpause button is available for the objective and can be clicked to activate the objective.

Close OKR

There are times when objectives need to be closed due to change in plans or priorities. OKRify provides the ability to close an objective. Key Result progress cannot be updated for a closed objective.

To close an objective and its key result,

- Go to the Edit/View Objective page by clicking on an objective from Hub or Company Goals.

- Click the close button and confirm by clicking Yes in the popup window.



- Once the objective is closed, the status field is set to closed.



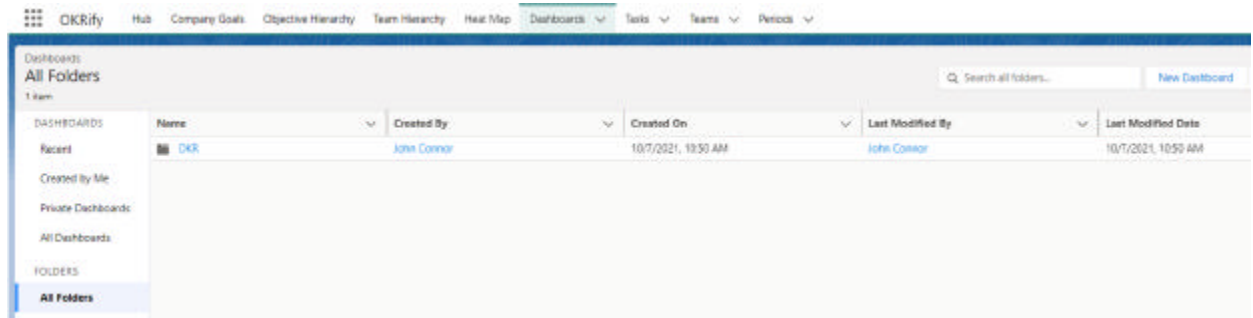
OKRify Dashboards

Dashboards are an important tool to view and understand data. OKRify provides the following dashboards based on OKR best practices to view and monitor OKR across your organization

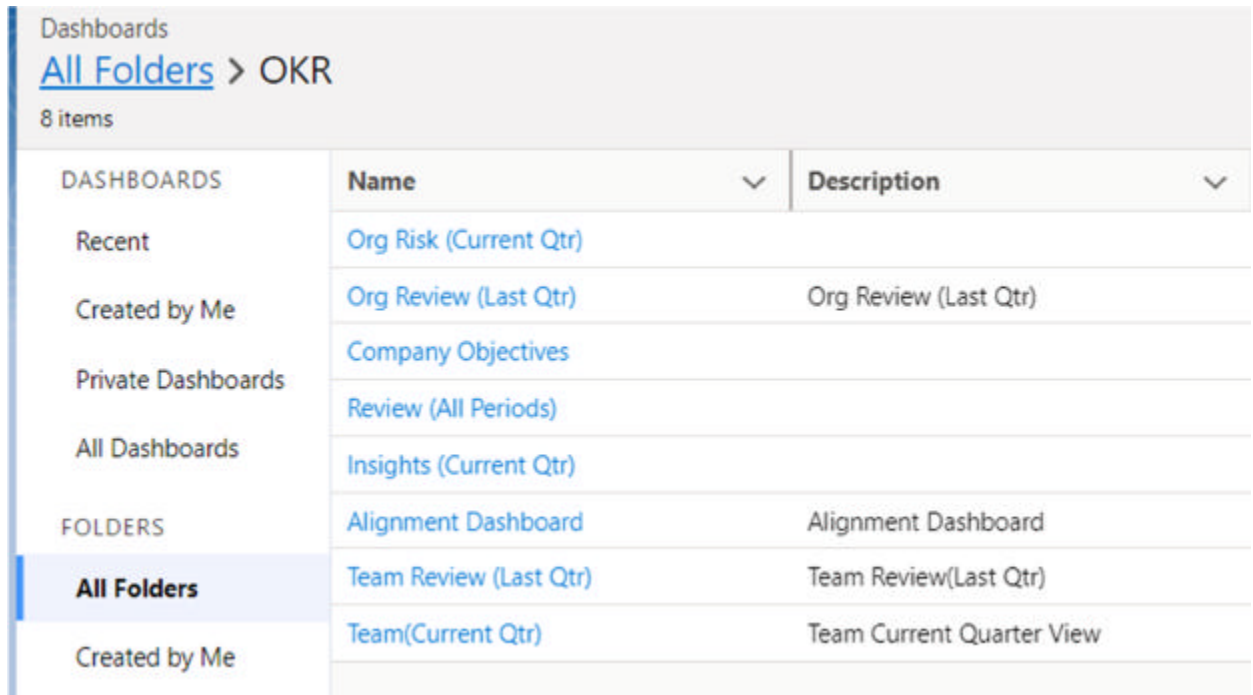
- Org Risk(Current Qtr) – Dashboard for Organization wide OKR risk, confidence, etc for current period.
- Org Review(Last Qtr) – – Dashboard for Organization wide OKR risk, confidence, etc for last period.
- Company Objectives – Dashboard for Company goals for current period.
- Review(All Periods) – Objectives and Key Results by periods
- Insights(Current Qtr) – Insight on OKR framework best practices such as aligned and non-aligned objectives, Key Result progress update score levels, KR Projection, etc
- Alignment Dashboard – Alignment Objective Report
- Team(Current Qtr) – Dashboard for a team's OKR, risk, progress, etc for current period. Users can set filters for their teams.

- Team Review (Last Qtr) – Dashboard for a team’s OKR, risk, progress, etc for the last period. Users can set filters for their teams.

Go to Dashboard-> All Folders and click OKR folder to see all the above dashboards.

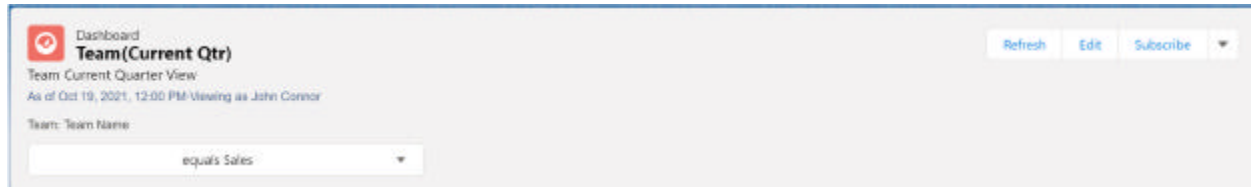


Click on any of the dashboard to see the charts, numbers and reports.

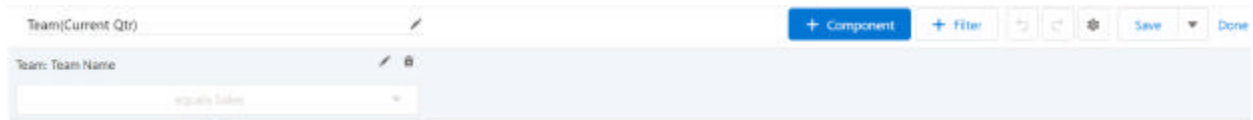


Team Dashboards

Team dashboards allow users the ability to filter for their specific team. Click Edit on the Dashboard to customize the dashboard.



Click the pencil icon for the Team Name to add your team as a filter.



Click Add filter value to add a new filter value

Edit Filter

Display Name

Team: Team Name

Filter Values (1)

1 Sales X

Add Filter Value

Cancel

Update

Add the Value and the Display Test of your team name. Enter your team name as it is in OKRify. Click Apply.

Edit ✕

Display Name
Team: Team Name

Filter Values (1)
1 Sales

Add Filter Value

Operator
equals

Value
Global Sales

Display Text
Global Sales

Cancel Apply

Cancel Update

Then click Update in the next window when you see your team name.

Edit Filter

Display Name

Team: Team Name

Filter Values (1)

1

Global Sales

×

Add Filter Value

Cancel

Update

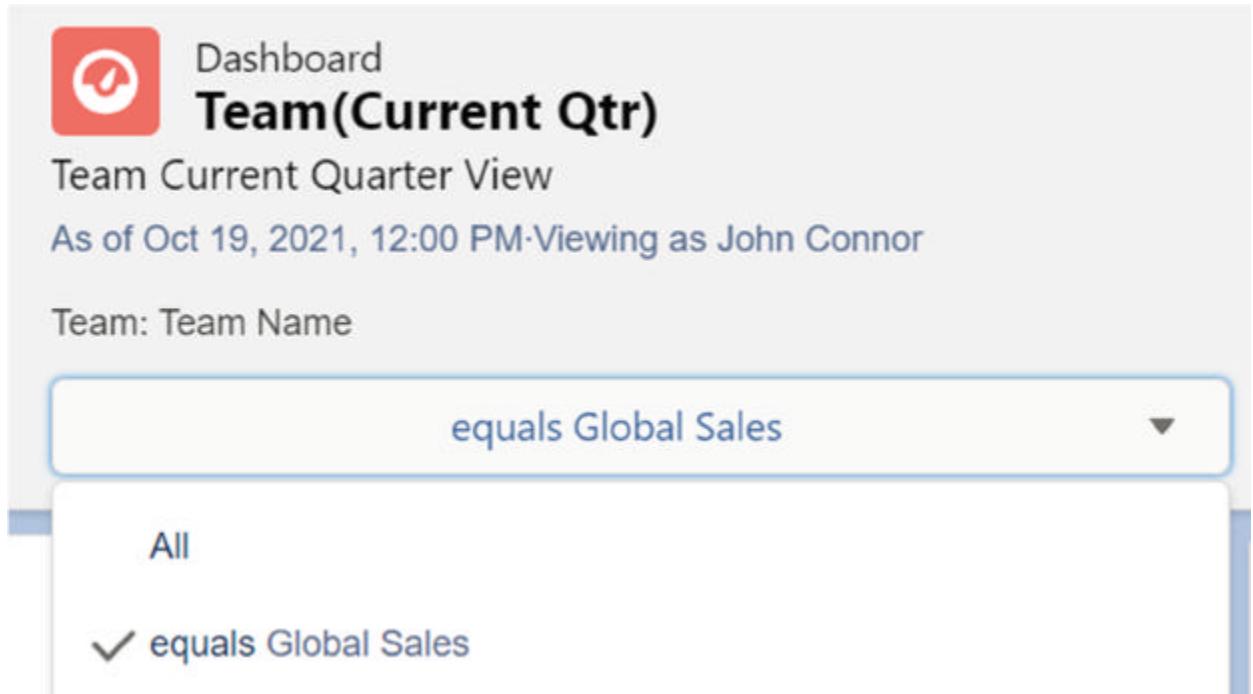
Click Save.

The screenshot shows a dashboard configuration window for a filter named "Team(Current Qtr)". The filter is currently set to "Team: Team Name" with a dropdown menu showing "equally Global Sales". The window has a toolbar with buttons for "+ Component", "+ Filter", a refresh icon, a close icon, a settings icon, "Save", and "Done".

Click Save again in the popup window.

The screenshot shows a "Save" dialog box with the title "Save". The main text asks, "Do you want to save changes you made to 'Team(Current Qtr)'?". At the bottom, there are three buttons: "Cancel", "Discard", and "Save".

Select your team and referred the dashboard to see the data.



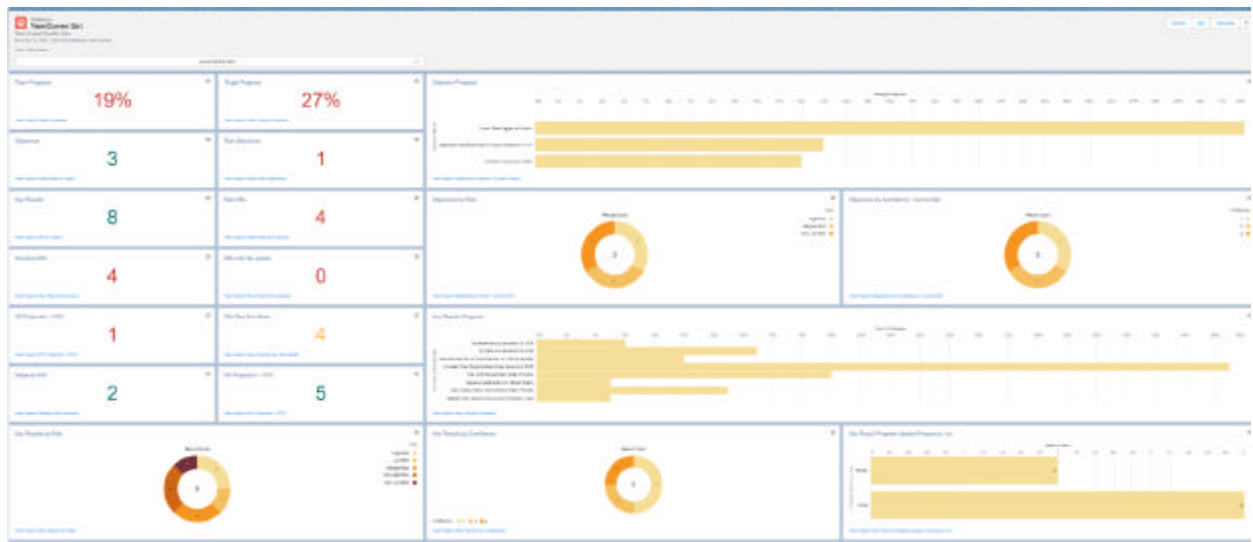
Dashboard
Team (Current Qtr)
 Team Current Quarter View
 As of Oct 19, 2021, 12:00 PM-Viewing as John Connor

Team: Team Name

equals Global Sales

All

✓ equals Global Sales

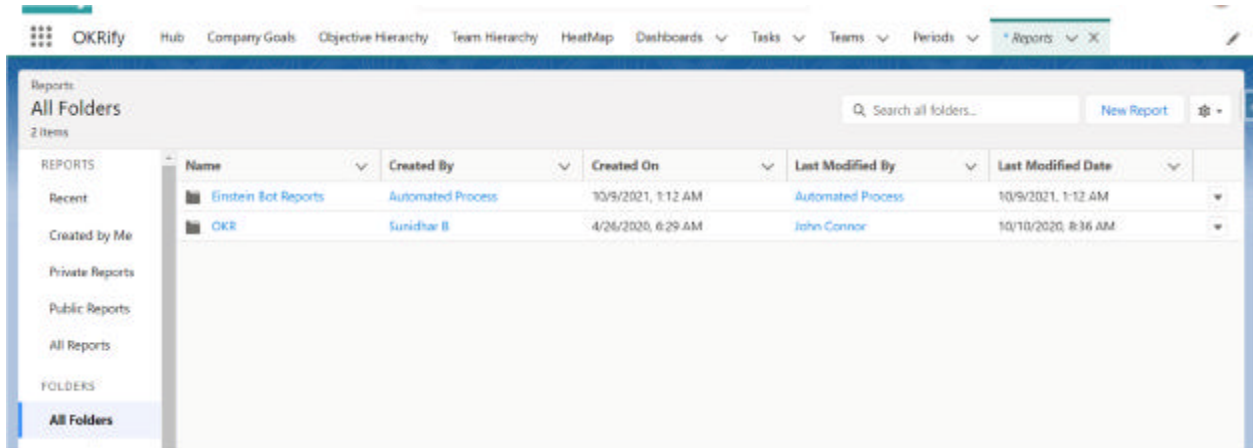


OKRify Reports

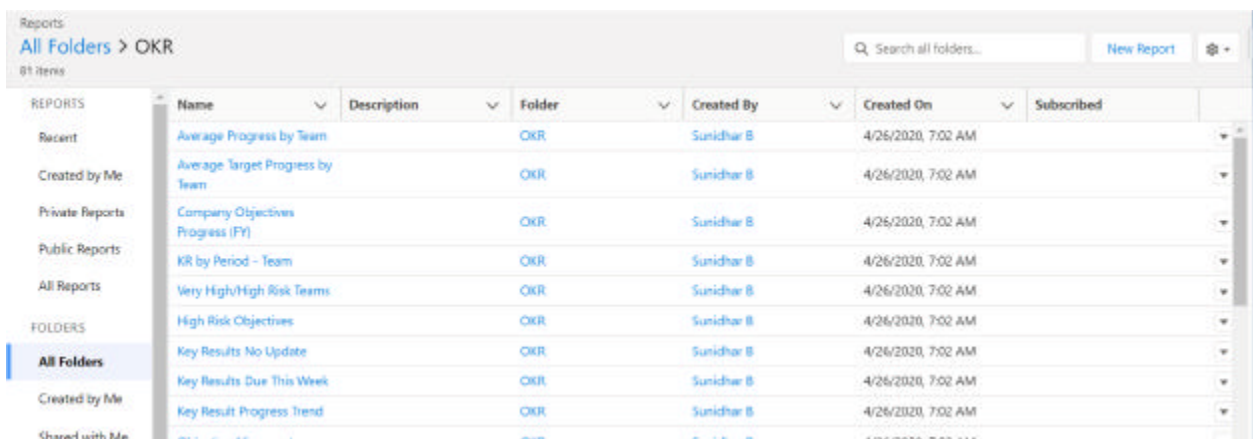
Reports and Dashboard are essential to track OKRs, analysing adoption of OKRs and for making improvements to OKR implementation in your organization. OKRify comes with a standard set of reports to track OKRs at Organization and team levels. We also provide reports to analyse OKR adoption in your organization.

To view OKRify reports,

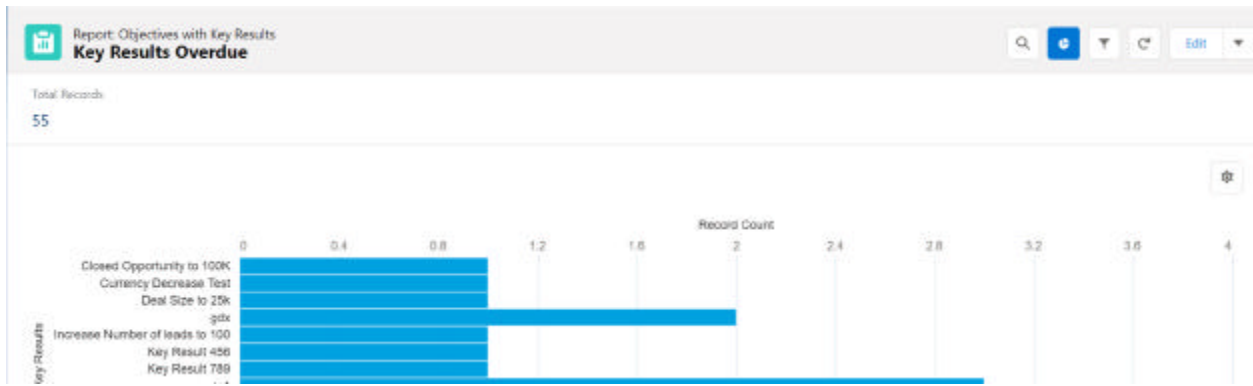
- Go to Reports tab and All Folders to see OKR folder



- Click on the OKR to see all the standard reports available



- Click on a report to see the report data, reports can be customized as per your requirement. New custom reports can also be created based on OKRify objects.

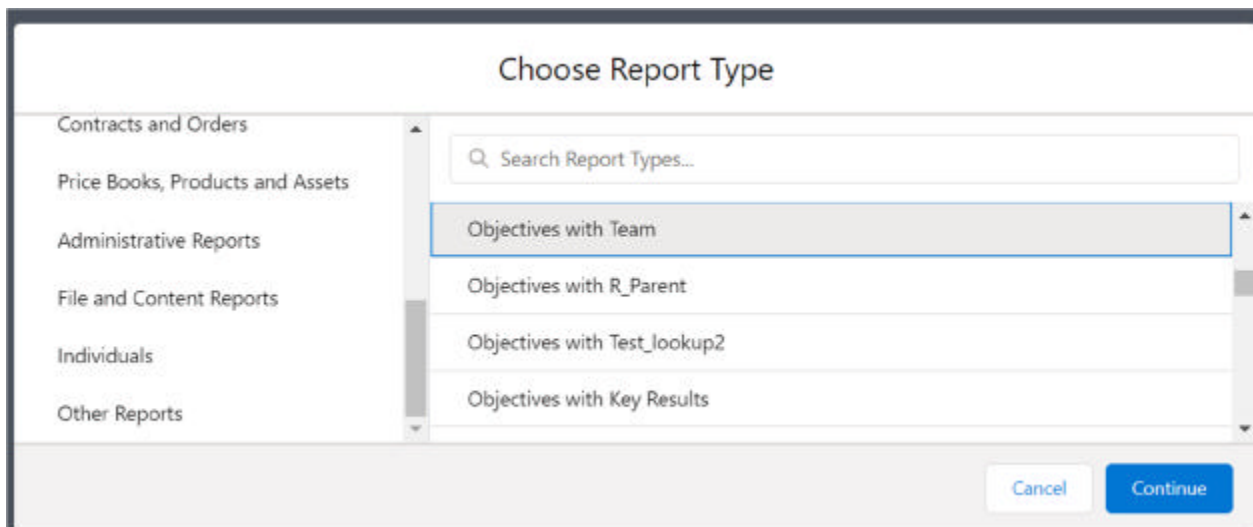


Create New Salesforce Report

Salesforce platform provides many benefits including the ability for users to create custom reports based on any standard, managed package or custom objects. Salesforce allows users to create Tabular reports, Summary reports, Matrix reports and Joined reports. Any of these reports can be created for OKRify objects. Salesforce provides the ability to add filters and charts to reports.

To create a report

- Go to reports and click New Report
- Select the report type you want to use and click continue



- Select fields for Groups – Row/ Columns and Columns for the report. Click Refresh to see the preview of the data.

REPORT ▾
New Objectives with Team Report

Objectives with Team

Got Feedback? Add Chart Save & Run Save Close Run

Outline Filters

Fields >

Groups

GROUP ROWS

Add group...

Team: Team Name

GROUP COLUMNS

Add group...

Columns

Add column...

Objective: Objective Name

Condense

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

Objective	Objective Name	Team	Team Name
39	Milestone KR Test	Employee Relations	Employee Relations
40	Close Of Test for Update Count 2	Employee Relations	Employee Relations
41	Improve Employee Satisfaction across the organization	OKRify	OKRify
42	Hire 42 New Employees this year	OKRify	OKRify
43	expandtest	Sales	Sales
44	Test Objective Linked OKS	Employee Relations	Employee Relations
45	Test John	Employee Relations	Employee Relations
46	Test for Subject	Sales	Sales
47	Close to test in current period	Sales NA	Sales NA
48	Test Objective	Sales NA	Sales NA
49	Close Of Monitor business originating from Web	Sales NA	Sales NA

- Select the Filters tab and enter filters are required.

REPORT ▾
New Objectives with Team Report

Fields >

Outline Filters

Filters

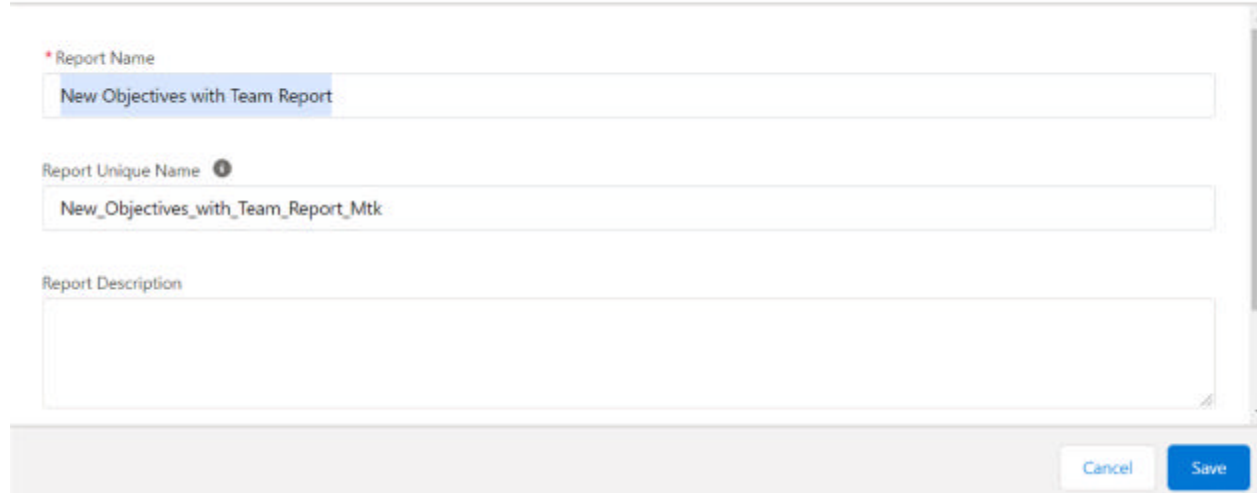
Add filter...

Show Me
All objectives

End Date
All Time

- Click Save. Enter a name for the report and description, click save again.

Save Report



* Report Name
New Objectives with Team Report

Report Unique Name ⓘ
New_Objectives_with_Team_Report_Mtk

Report Description

Cancel Save

Create new Salesforce Dashboard

Similar to reports, Salesforce also provides the ability to create Dashboards in which reports or charts based on reports can be easily added. OKRify provides the following pre built dashboards

- Org Risk (Current Qtr)
- Team (Current Qtr)
- Insights (Current Qtr)
- Company Objectives
- Team Review (Last Qtr)
- Org Review (Last Qtr)
- Review (All periods)

To create a new Dashboard,

- Go to Dashboard and click New Dashboard.
- Enter Name for Dashboard, Description and select a folder. If a new folder is required create a new folder before saving the dashboard.

New Dashboard

* Name

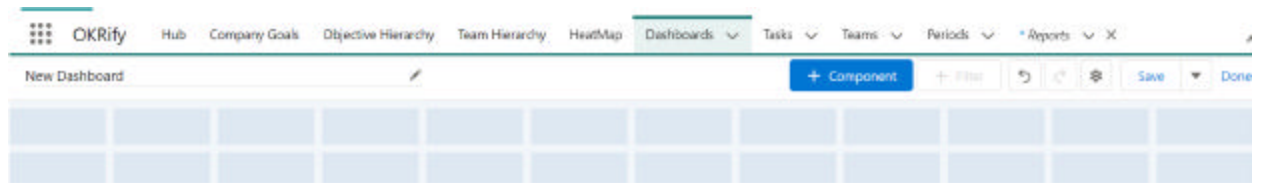
Description

Folder

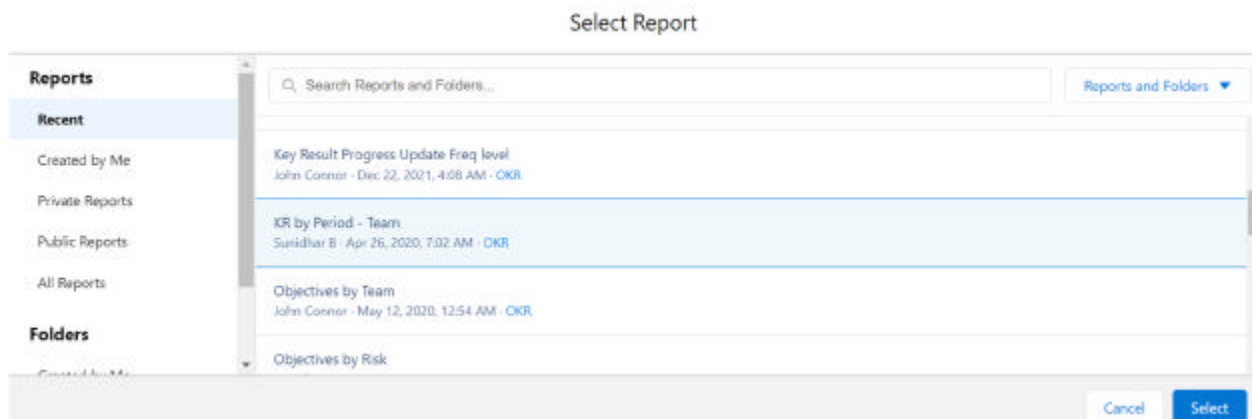
Private Dashboards Select Folder

Cancel Create

- Click Component to add a new component to the Salesforce Dashboard



- Select the report you want to add to Salesforce Dashboard and click Select.



- Select “Use chart settings from Report” or select a chart type to use in the custom Salesforce Dashboard. Once a chart type is selected, the chart can be viewed as a preview.

Add Component

Report
 KR by Period - Team

Use chart settings from report

Display As

Y-Axis

Preview
 KR by Period - Team

Record Count

E Period: Period Name	Record Count
-	40
FY 2020	23
FY 2021	223
FY 2022	3
Q1 FY20	2
Q1 FY 21	89
Q1 FY 22	5

View Report (KR by Period - Team)

Cancel Add

- Add more components and resize each component as required. Save the custom Dashboard.



Set up Teams and Team Members

Teams can be set up in OKRify as per your organization structure or as needed to manage your organization’s OKRs. OKRify supports multiple levels of team hierarchy from department levels to individual functional units within an organization. OKRify simplifies the setup process as everything in an organization from company, departments to individual groups are set up as teams. Team members can also be managed for each team including team managers, and edit access for Team OKRs.

Setting up your team and onboarding users is one of the first steps in getting started with OKRify.

We understand setting up teams and team members can be a time consuming process. We value our

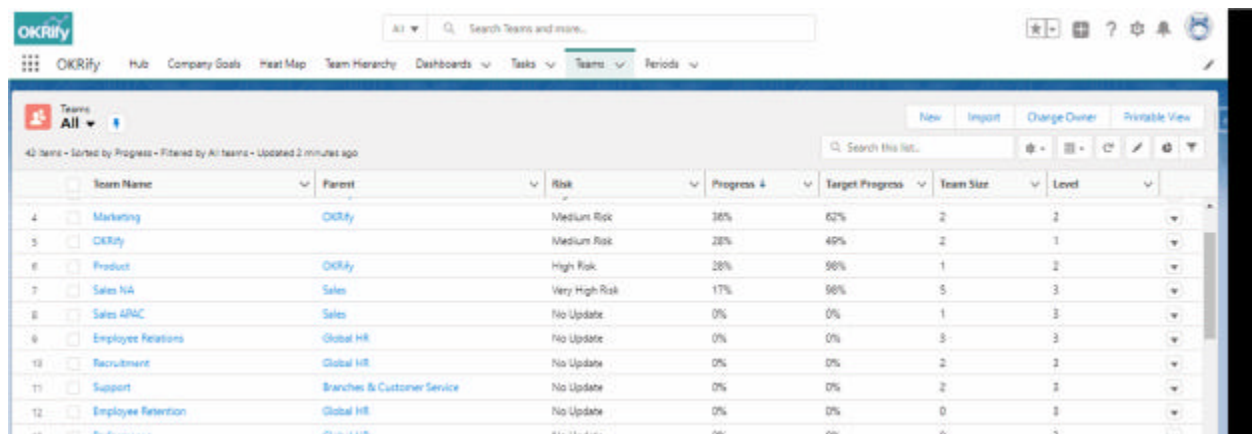
customer's time and to enable quick onboarding our support team can help with setting up teams and team members free of cost. Please contact us at support@OKRify.com so we can assist you with setting up your teams and get started with OKRify in days if not hours. Happy OKRifying!

In this article we will

- Create Team
- Search teams
- Edit/View Team details
- Add/Manage Team Members

Create Team

Team can be a company, department, functional unit or a project team. Teams can be created in OKRify's Teams tab. Click the New button to create a new team.



The screenshot shows the OKRify Teams tab interface. At the top, there is a search bar and navigation tabs for Hub, Company Goals, Heat Map, Team Hierarchy, Dashboards, Tasks, Teams (selected), and Periods. Below the navigation, there are buttons for 'New', 'Import', 'Change Owner', and 'Printable View'. The main content area displays a table of teams with the following columns: Team Name, Parent, Risk, Progress, Target Progress, Team Size, and Level. The table contains 12 rows of team data.

Team Name	Parent	Risk	Progress	Target Progress	Team Size	Level
Marketing	OKRify	Medium Risk	36%	62%	2	2
OKRify	OKRify	Medium Risk	28%	49%	2	1
Product	OKRify	High Risk	28%	98%	1	2
Sales NA	Sales	Very High Risk	17%	98%	5	3
Sales APAC	Sales	No Update	0%	0%	1	3
Employee Relations	Global HR	No Update	0%	0%	3	3
Recruitment	Global HR	No Update	0%	0%	2	3
Support	Branches & Customer Service	No Update	0%	0%	2	3
Employee Retention	Global HR	No Update	0%	0%	0	3
BusinessOps	Global HR	No Update	0%	0%	0	3

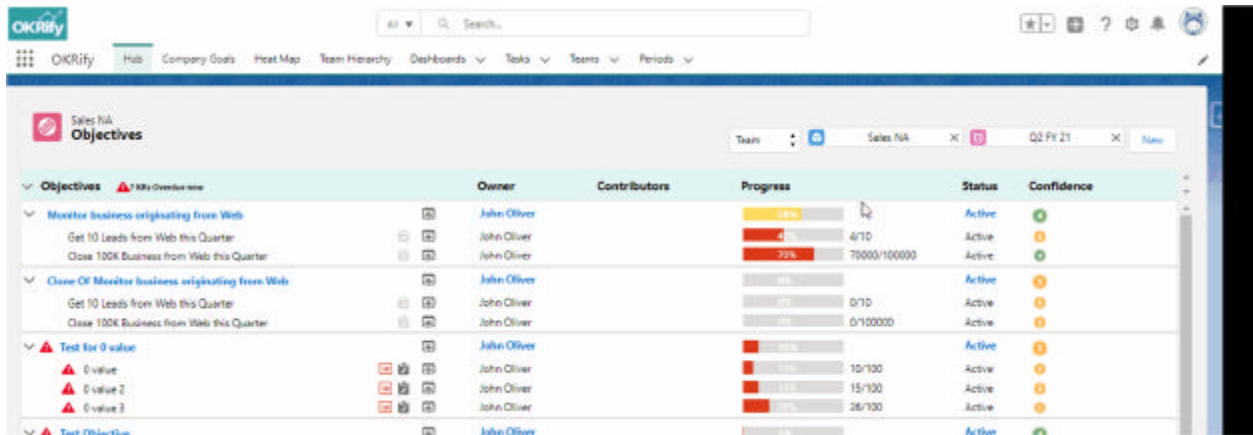
In the popup that follows

1. Enter the team name
2. Enter parent team name
3. Make sure the active flag is checked if you want the team to be active immediately.

In the example provided above, Sales Operation is the team with Sales as the Parent team. Every team except the Company(root organization) should have a Parent team.

Search & Edit/View Teams

Click on the Teams tab to view the teams that have already been created. By default, the recently viewed teams will only be displayed. You can click on the downward arrow near the Recently viewed tab and select All to view all the teams that are available. You can search a Team by typing the team name in the search text box.



The screenshot shows the OKRify interface with a search bar at the top. Below the search bar, there are navigation tabs: Hub, Company Goals, Heat Map, Team Hierarchy, Dashboards, Tasks, Teams, and Periods. The main content area displays a table of objectives for the 'Sales NA' team in 'Q2 FY 21'. The table has columns for Objectives, Owner, Contributors, Progress, Status, and Confidence. The progress column shows progress bars and numerical values.

Objectives	Owner	Contributors	Progress	Status	Confidence
Monitor business originating from Web	John Oliver		100%	Active	Green
Get 10 Leads from Web this Quarter	John Oliver		4/10	Active	Yellow
Close 100K Business from Web this Quarter	John Oliver		70%	Active	Green
Close Of Monitor business originating from Web	John Oliver		0%	Active	Yellow
Get 10 Leads from Web this Quarter	John Oliver		0/10	Active	Yellow
Close 100K Business from Web this Quarter	John Oliver		0/100000	Active	Yellow
Test for 0 value	John Oliver		10%	Active	Yellow
0 value 1	John Oliver		10%	Active	Yellow
0 value 2	John Oliver		15%	Active	Yellow
0 value 3	John Oliver		25%	Active	Yellow
Test Objective	John Oliver		10%	Active	Green

You can click on the Team Name to view

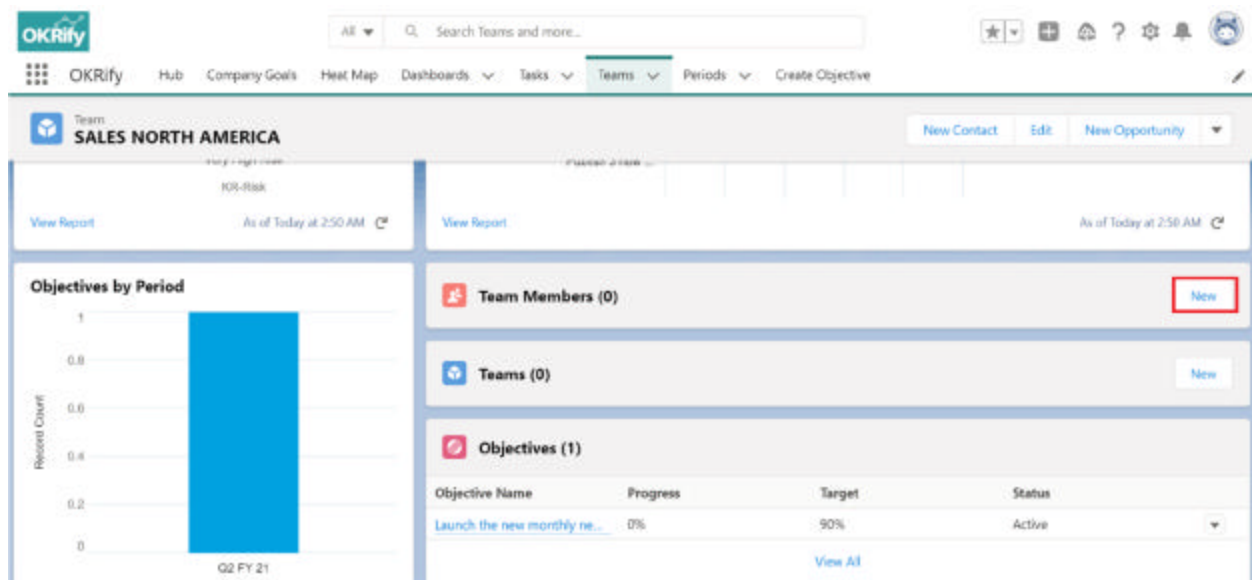
- Team Header (Risk, Team Size, Progress and Target Progress)
- Team Information (Team Name, Parent and Active Status)
- Team Members
- Teams (Child Teams)
- Objectives
- Dashboard for team
 - Objectives by Risks
 - Objective Progress
 - KR by Risk
 - KR Progress
 - Objectives by Period
 - Key Results by Period
 - Key Result Update Frequency level

Edit Team

The information in the information section (Team Name and Parent) can be edited. Uncheck the Active flag to deactivate a team. Any change to the Parent will immediately change the Team Hierarchy.

Add/Manage Team Members

After creation of a team it is important to add appropriate team members to each team. Click New in the Team Members Section in the team page to add new team members.

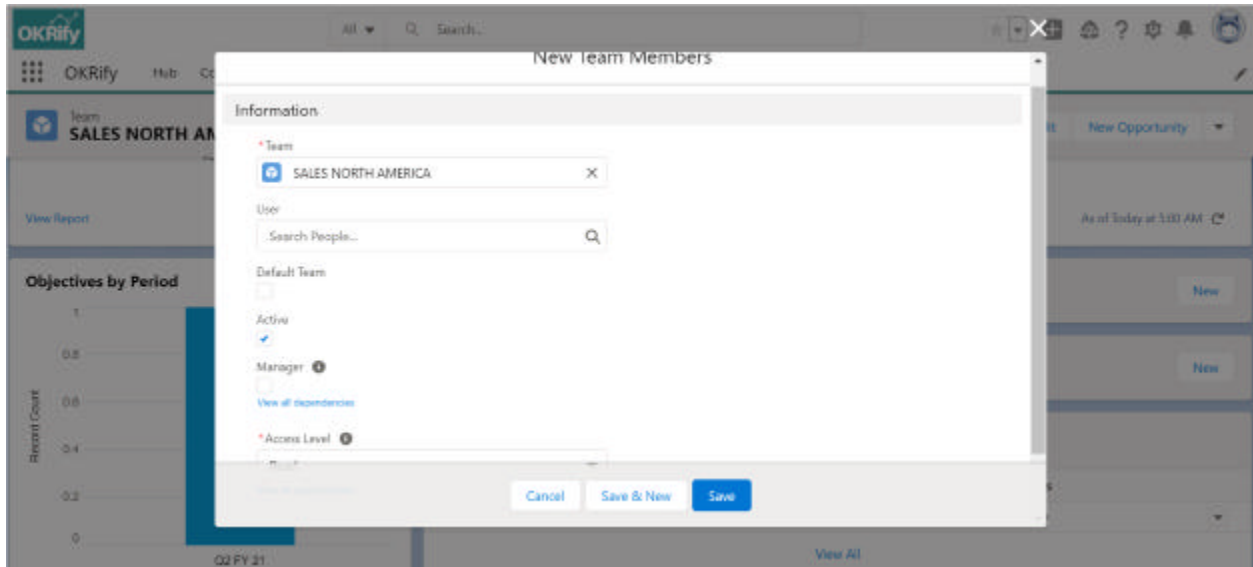


The screenshot displays the OKRify interface for the 'Team SALES NORTH AMERICA'. The navigation bar includes 'OKRify', 'Hub', 'Company Goals', 'Heat Map', 'Dashboards', 'Tasks', 'Teams', 'Periods', and 'Create Objective'. The 'Teams' section is active, showing a 'New Contact', 'Edit', and 'New Opportunity' dropdown. The main content area is divided into four sections: 'Objectives by Period' (a bar chart for Q2 FY 21), 'Team Members (0)' (with a 'New' button), 'Teams (0)' (with a 'New' button), and 'Objectives (1)'. The 'Objectives (1)' section contains a table with the following data:

Objective Name	Progress	Target	Status
Launch the new monthly re...	0%	90%	Active

In the pop up window for the new team member, enter the following information and save team member information.

- User – User for the new team member
- Default Team – if this team will be the default team for this team member
- Active
- Manager – if this team member is the manager for the team
- Access Level
 - Read – Users with this access cannot edit other team members OKRs.
 - Edit – Users with this access can edit OKRs of any team member for this team (Manager always have edit access for the team)



A user can be part of multiple teams and can be manager for multiple teams. Only one team can be set as a Default Team for a user.

Set up Periods

Periods are the timeframe within which OKRs are targeted to be completed. OKRify provides the ability to have two types of period current at any time

- Current Period – generally quarterly, it can also be monthly or other time frame
- Current FY – generally annually

Status for period determines whether a period is current, closed or a future period. The following options are available as period status

- Current FY
- Current Period
- Future FY
- Future Period
- Closed FY
- Closed Period

In this article we will

- Create Period
- Search Period
- Edit Period (Change Period Status to Current or Close)

Create Period

Periods can be created in the Periods tab by OKR Administrator (OKR Admin Permission Set is required). Click New to create a new period. Enter the following fields and save the period:

- Name
- Start Date
- End Date
- Parent (Optional) – If a parent exists (Example Annual Period for Quarterly periods)
- Status – Determines Current, Closed and Future Periods. Possible for both FY and Periods (Could be Quarterly, Monthly, etc) based on needs.

Sample Current FY

*Period Name	Start Date
<input type="text" value="FY 2020"/>	<input type="text" value="1/1/2020"/>
Description	End Date
<input type="text" value="FY 2020"/>	<input type="text" value="12/31/2020"/>
Parent ⓘ	Status
<input type="text" value="Search Periods..."/>	<input type="text" value="Current FY"/>

Sample Current Period

New Period

Information

* Period Name	Start Date
<input type="text" value="Q2 2020"/>	<input type="text" value="4/1/2020"/>
Description	End Date
<input type="text" value="Q2 2020"/>	<input type="text" value="6/30/2020"/>
Parent	Status
<input type="text" value="FY 2020"/>	<input type="text" value="Current Period"/>

Search and view Period

Click on the Periods tab to view the periods that have already been created. By default, the recently viewed periods will only be displayed. You can click on the downward arrow near the Recently viewed tab and select All to view all the periods that are available. You can search a period by typing the period name in the search text box.

Add Search Period Gif



You can click on the Period Name to view details

- Period Information (Period Name, Start Date, End Date, Parent, and Status)
- Dashboard for Period
 - Objectives by Team

- Objective by Risk
- Objective by State
- Period (Child Periods)
- Objectives (List of Objectives created for the Period)

Period
Q2 FY 21

Period Name Q2 FY 21	Start Date 4/1/2021
Description Q2 FY 2021	End Date 6/30/2021
Parent ⓘ FY 2021	Status Current Period
Created By John Connor, 1/27/2021, 2:58 AM	Last Modified By John Connor, 10/5/2021, 12:50 PM

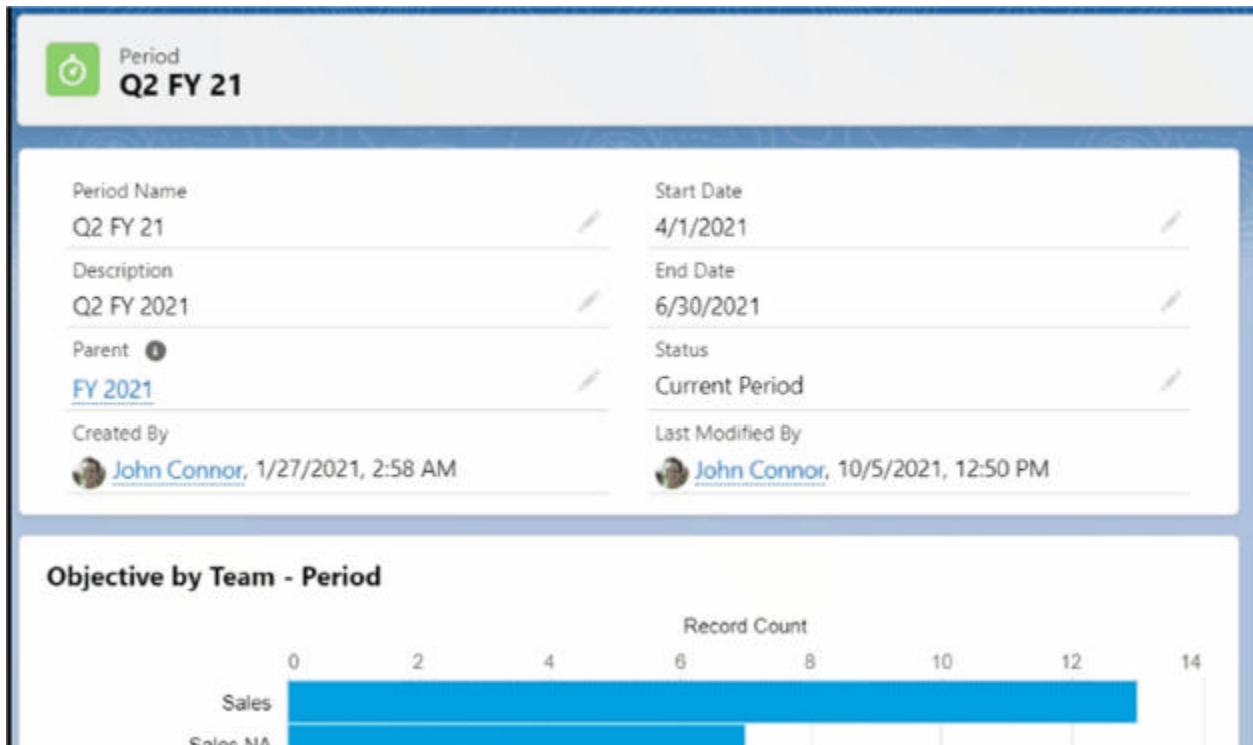
Objective by Team - Period

	Record Count
Sales	13
Sales NA	7

Edit Period

Search for a period as described above and click on a period name to edit the period. The information in the information section (Period Name, Start Date, End Date, Parent and Status) can be edited. The most common change for period is updating the status when closing or opening a period for current period, to update the status for a period, status field can be changed and changes can be saved by clicking save button as shown below.

Please ensure only one period is set as Current Period and Current FY to avoid error in Hub and Create OKR.



Setup Objects for Subject Key Results

Subject is a key feature in OKRify using which key result progress can be updated automatically based on any salesforce object. For Example: Key Result for number of closed opportunities in the quarter can be automatically updated daily based on the Salesforce Opportunity object. Any standard or custom object can be part of Subject Key Results. Subject allows business users to easily enter the object, field and the filter conditions needed to be used for updating key results without the need for complex setups or reports.

[Please click here to check how an Subject Key Result can be created.](#)

Any Salesforce object can be added for Subject Key Results by following the below steps:

Go to Setup -> Search for Custom Metadata Types and click on it to open the Custom Metadata Types. Click Manage Records for KR's Object Fields in the custom metadata types to enter the details for the object.

The screenshot shows the Salesforce Setup interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar contains 'Search Setup'. Below the navigation bar, a search box contains 'Custom met'. The left sidebar shows 'Custom Code' expanded, with 'Custom Metadata Types' selected. The main content area is titled 'Custom Metadata Types' and contains the heading 'All Custom Metadata Types'. Below the heading, there is explanatory text and a table with one row: 'KR sObject Fields' with a 'Manage Records' link. A 'New Custom Metadata Type' button is visible in the top right of the table area.

Click the New button to enter a new Object.

The screenshot shows the 'KR sObject Fields' page in Salesforce Setup. The page title is 'KR sObject Fields'. Below the title, there is a 'View: All' dropdown and a 'Create New View' link. A table lists existing sObject Fields with columns for 'Action', 'Label', 'KR sObject Fields Name', and 'Namespace Prefix'. The table contains two rows: 'Lead' and 'Opportunity'. A 'New' button is located in the top right corner of the table area.

Action	Label	KR sObject Fields Name	Namespace Prefix
Edit	Lead	Lead	Okrify
Edit	Opportunity	Opportunity	Okrify

Enter the following fields for the object and save.

- Label
- KR's Objects Name

- Subject API Name (Api name for the object you want to add)

The screenshot shows the 'KR sObjects Edit' interface. It features a header with the title 'KR sObjects Edit' and three buttons: 'Save', 'Save & New', and 'Cancel'. Below the header is a section titled 'Information' which contains three input fields. The first field is labeled 'Label' and contains the text 'Opportunity'. The second field is labeled 'KR sObjects Name' and also contains 'Opportunity', with a small blue information icon to its right. The third field is labeled 'sObject API Name' and contains 'Opportunity'. At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

Note: Please ignore Fields if you see it as it is not required, all numeric fields in the object added are available in the Subject Key result.

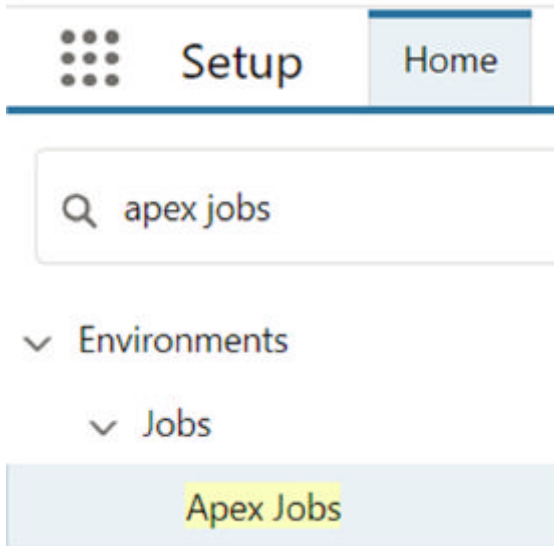
Set up Background Programs

The following Apex class can be scheduled as background apex jobs in OKRify

- Weekly Consolidated Email Notification – KeyResultOverdueNotificationSchedule
- Subject Key Result Update – TargetsObjectBatchSchedulable
- Objective Team Progress Update – TargetsObjectBatchSchedulable

Verify Apex Jobs

Subject Key Result Update (TargetsObjectBatchSchedulable) and Objective Team Progress Update (TargetsObjectBatchSchedulable) jobs are automatically scheduled to run daily when OKRify is installed. To view the queued jobs go to setup -> Apex Jobs



Click Apex Jobs to see all the queued and completed jobs. We recommend creating a separate view for queued jobs to view the list of jobs scheduled.

Apex Jobs Help for this Page

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

View: **Queued** | [Edit](#) | [Create New View](#)

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class	Apex Method	Apex Job ID
	10/8/2021, 9:07 AM	Scheduled Apex	Queued		0	0	0	Connor John		KeyResultOverdueNotificationSchedule		70759000008XhpK
	10/7/2021, 10:51 AM	Scheduled Apex	Queued		0	0	0	CKRify		ObjectivesTeamSchedule		70759000009WP4X
	10/7/2021, 10:51 AM	Scheduled Apex	Queued		0	0	0	CKRify		TargetsCbrecBatchSchedulable		70759000009WPyJ

Subject Key Result Update (TargetsObjectBatchSchedulable) and Objective Team Progress Update (TargetsObjectBatchSchedulable) apex classes can be scheduled to run more often as per needs of your organization.

Setting a new Apex Job

To setup new Apex job go to Setup -> Apex classes



Setup

Home

Object

Custom Code

Apex Classes

Click Schedule Apex to schedule a new Apex Job.

A | B | C | D | E | F | G | H | I | J | K | L

Developer Console

New

Generate from WSDL

Run All Tests

Schedule Apex

Enter the job name and click Apex Class field lookup to see all the apex classes available for scheduling. Select the Apex class required.

SETUP Apex Classes

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automa

Save Cancel

Job Name: Key Result Email Notificatic

Apex Class: [Lookup Icon]

Schedule Apex Execution

Frequency: Weekly Monthly

Copyright

Lookup

Search... Go!

You can use "*" as a wildcard next to other chara

Recently Viewed Apex Classes

Name
KeyResultOverdueNotificationSchedule
ObjectivesTeamSchedule
TargetsObjectBatchSchedulable

Enter Frequency as Weekly or Monthly and select the appropriate days and time for the job to run. Click save to schedule the apex job.

The screenshot shows the 'Schedule Apex Execution' dialog box in Salesforce. At the top, there are 'Save' and 'Cancel' buttons. Below them, the 'Job Name' is 'Key Result Email Notification' and the 'Apex Class' is 'KeyResultOverdueNotificatio'. The 'Schedule Apex Execution' section contains the following settings:

- Frequency:** Weekly (selected), Monthly
- Recurs every week on:** Monday (checked), Sunday, Tuesday, Wednesday, Thursday, Friday, Saturday
- Start:** 10/17/2021 [10/17/2021]
- End:** 11/17/2021 [10/17/2021]
- Preferred Start Time:** 9:00 AM

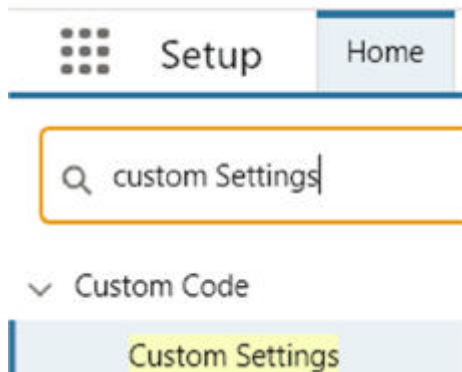
Exact start time will depend on job queue activity.

Set up default period for company goals – Custom Settings

OKRify provides ability to setup the below configuration in Salesforce custom settings

- Default period for Company Goals – Current FY or Current Period
- Activate Consolidated Email Notification
- Configure Sender Name for Consolidated Email Notification
- Activate contributors in Hub
- Enabled Key Result Update Date Editing
- Key Result Update Score Tolerance
- Show Prediction in Key Result Trend Graph

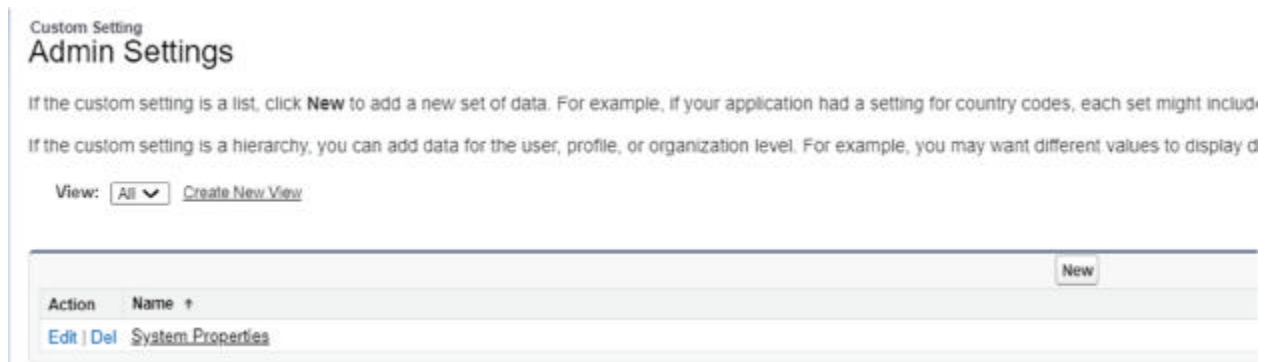
To change Custom Settings go to setup -> Custom Settings



Click Manage for Admin Settings



Click Edit for System Properties. If System Properties does not exist click New to create a new entry and enter the name System Properties.



Do not change the Name "System Properties", update the settings as required for your organization and click save.

Note: Settings marked as Future Release do not affect any current features, please do not add or change these settings.

Admin Settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit Admin Settings Save Save & New Cancel

Admin Settings Information

Name	<input type="text" value="System Properties"/>
Company_Confidence(Future Release)	<input type="text"/>
Company Default Period	<input type="text" value="Annually"/>
Company_Frequency(Future Release)	<input type="text"/>
Company_Period(Future Release)	<input type="text"/>
Company_Type(Future Release)	<input type="text"/>
Create OKR help URL(Future Release)	<input type="text"/>
Enable Contributors	<input checked="" type="checkbox"/>
High Risk(Future Release)	<input type="text"/>
KR Update Date Editable	<input checked="" type="checkbox"/>
KROverdue Notify	<input checked="" type="checkbox"/>
KROverdue Sender Name	<input type="text" value="Okrify"/>
KR_Custom_Field1_Req(Future Release)	<input type="checkbox"/>
KR_Custom_Field1(Future Release)	<input type="text"/>
KR_Custom_Field2_Req(Future Release)	<input type="checkbox"/>
KR_Custom_Field2(Future Release)	<input type="text"/>
KR Update Tolerance %	<input type="text" value="60"/>

Default Period for Company Goals

Company Default Period

For the Company Goals tab, the default period can be set as Current Period or Current FY. Annually – Current FY is set as default, to change to Current Period enter Quaterly in the Company Default Period.

Activate Contributors in Hub

Enable Contributors

Enabling the above flag will enable contributors column in the hub view

Activate Consolidated Email notification

KROverdue Notify

Activate the above flag is required for consolidated email notification.

KeyResultOverdueNotificationSchedule Apex class also needs to be scheduled to run at the required times.

Consolidate Email Sender Name

KROverdue Sender Name

Enter the name that will be used to send consolidated email notification, as default OKRify is set as the default Sender Name.

Enable Key Result Update Date Editing

KR Update Date Editable

Activating this flag will allow users the ability to change update date when entering Key Result Progress Updates

Key Result Update Score Tolerance

KR Update Tolerance %

Key Result Update Tolerance is used to calculate the Key Result Score, the default is set as 60%. Increasing the value will provide stricter Key Result Update Score.

Show Prediction in Key Result Trend Graph



Enabling this flag will show the final predicted value for a Key Result in the Key Result Trend Graph in the Key Result Update screen.

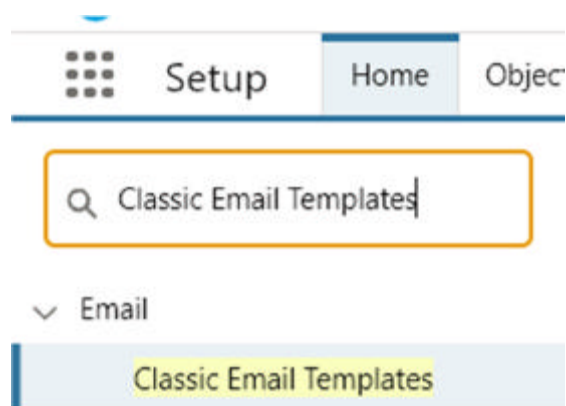
Update Email Template – Key Result Overdue Notifications

OKRify provides two email notifications for Overdue Key Results – individual email notification for each key result and consolidated weekly email notification. Email templates for both these notifications can be customized as needed for your organization.

Individual Email Notification

Individual email notification uses a Custom Email template which can be directly updated in Classic Email Templates from setup. OKRify uses a process builder to send an individual email notification for an overdue Key Result.

Go to Setup -> Classic Email Templates



Select the OKR folder to see both the email templates. KR Update Reminder is the template for individual email notifications. Click Edit to edit the subject of the Email notification.

Classic Email Templates

OKR

Classic Email Template Availability

Folder: [Edit](#) | [Create New Folder](#)

[New Template](#)

Action	Email Template Name ↑	Template Type	Available For Use
Edit Del	KR Update Reminder	Custom	✓
Edit Del	Overdue Key Results	Visualforce	✓

Email notification’s subject can be edited and merge fields can also be added as required for your organization.

Available Merge Fields

Select Field Type: Select Field: Copy Merge Field Value:

Copy and paste the merge field value into your template below.

 This Email Template is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Email Template Edit

Email Template Information

Folder:

Available For Use:

Email Template Name:

Template Unique Name:

Namespace Prefix: Okrify

Installed Package: OKRify

Encoding:

Description:

Subject:

Click the template name to edit the email template. Click Edit HTML version to edit the html version of the email template.

Email Template

Subject:

HTML Preview

Dear {!Okcrify__Key_Result__c.Okrify__Owner__c},

Progress update for the below key result is due today, please enter the current progress in OKRify Salesforce App.

Objective Name : {!Okcrify__Key_Result__c.Okrify__Objective_Name__c}
 Key Result Name: {!Okcrify__Key_Result__c.Name}
 Target Type : {!Okcrify__Key_Result__c.Okrify__Target_Type__c}
 Target : {!Okcrify__Key_Result__c.Okrify__Target__c}
 Update Frequency: {!Okcrify__Key_Result__c.Okrify__Update_Frequency__c}

Thank You
Admin

Email text can be edited in html and any merge fields can also be included in the email template. Save the email template after making the changes.

Custom Email Template Edit

KR Update Reminder

Paste the HTML code for your custom HTML email in the box below. Use merge fields to personalize your email content. If the text version of the template is left blank, this version will be stripped of HTML and sent as the text version.

Available Merge Fields		
Select Field Type	Select Field	Copy Merge Field Value
Contact Fields		

Copy and paste the merge field value into your HTML content below.

Save Preview Cancel

HTML Email Content

Subject	Remainder - Key Result '{!Okrifly__Key_Result__c.Name}' Progress Update
HTML Body	Dear {!Okrifly__Key_Result__c.Okrifly__Owner__c}, Progress update for the below key result is due today, please enter the current progress in OKRify Salesforce App. Objective Name : {!Okrifly__Key_Result__c.Okrifly__Objective_Name__c} Key Result Name: {!Okrifly__Key_Result__c.Name} Target Type : {!Okrifly__Key_Result__c.Okrifly__Target_Type__c} Target : {!Okrifly__Key_Result__c.Okrifly__Target__c} Update Frequency: {!Okrifly__Key_Result__c.Okrifly__Update_Frequency__c} Thank You Admin

Consolidated Email Notification

Consolidated weekly email notifications for overdue Key Results are sent using a background Apex Job, please schedule the apex job at appropriate times for sending email notifications. Consolidated weekly email notification uses a Visualforce type email template.

Go to Setup -> Classic Email Template

Overdue Key Results is the name of the email template for consolidated email notification. Click edit to change subject or click on the email template name to update the email notification.

OKR

Classic Email Template Availability

Folder: [Edit](#) | [Create New Folder](#)

[New Template](#)

Action	Email Template Name	Template Type	Available For Use
Edit Del Down Arrow	KR Update Reminder	Custom	✓
Edit Del Down Arrow	Overdue Key Results	Visualforce	✓

Click Edit Template to update the template.

Email Template [Edit Template](#) [Send Test and Verify Merge Fields](#)

Subject:

HTML Preview

OKRify

Dear ,

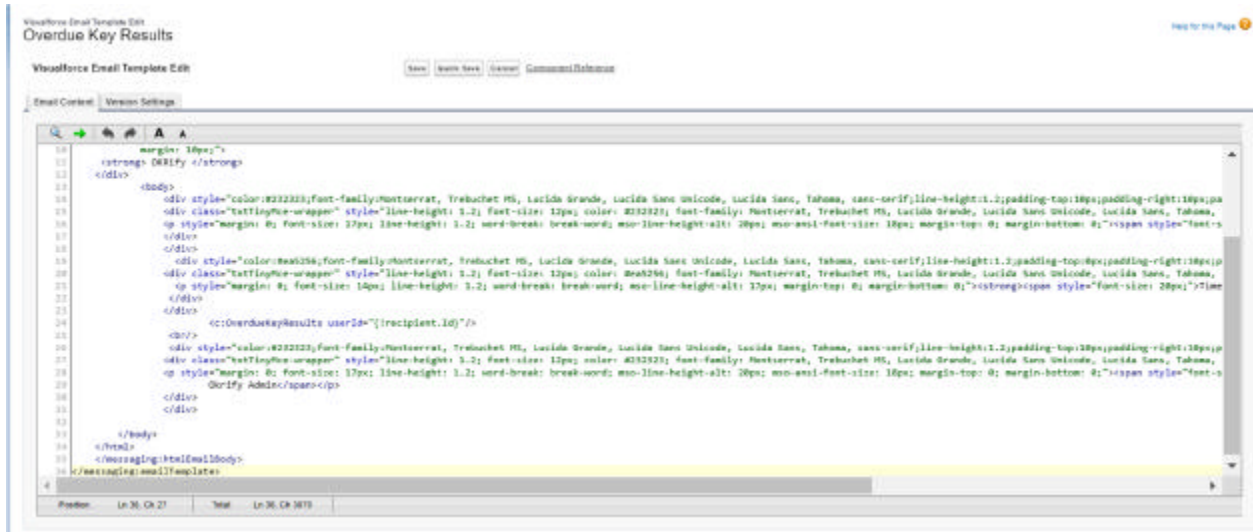
Time to update your OKRs! Please update the below Key Results.

Objective/Key Result	Team	Progress	Confidence	Last Updated
----------------------	------	----------	------------	--------------

[Click here to review your OKRs and update your progress](#)

Thank You,
OkriFY Admin

This email template uses visual force component OverdueKeyResults in the email template. Email template can be updated with a new visual force component if required based on your organization requirement. Please contact support@okriFY.com if you need help with creating custom email templates or visual force components for your emails.



Deactivate Individual Key Result Email Notification Process Builder

OKRify uses Process Builder – ‘KR Progress Update Notification Rule’ to send individual notifications for overdue Key Result progress updates.

The process builder can be deactivated to stop the notification. To deactivate the process builder go to Setup -> Process Builder

Click Deactivate for Version 2: KR progress Update Notification Rule



Click Confirm to Deactivate.

Deactivate Version

Are you sure you want to deactivate this version?

CancelConfirm

Setup Home Object Manager

Process Builder ← Back to Setup ? Help

My Processes New

PROCESS ▲	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> KR Progress Update Notification Rule		Key Result	Record Change	10/6/2021	InActive	