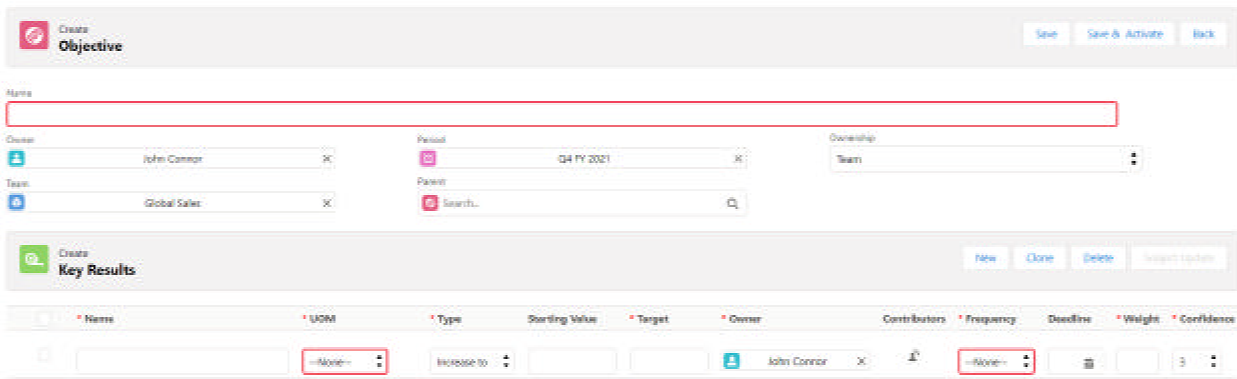
Create OKR

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.



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. Sobject UOM allows automatic key result update based on any Salesforce object. Sobject key result requires setting object and filter conditions, please click here for more details.

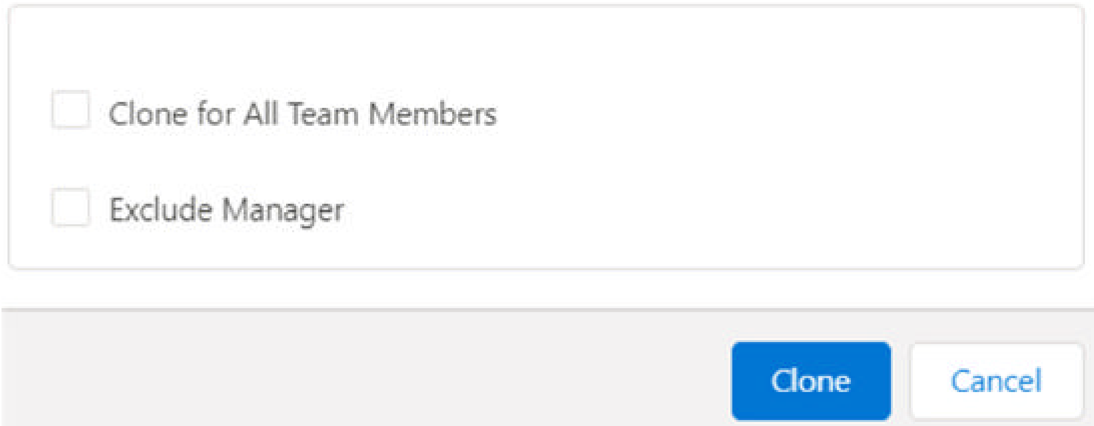
- Type(Required) – Defaulted to 'Increase to' which means the key result progress will increase from starting value to the target. Select 'Decrease to' if the key result will decrease from starting value to the target. For Example: Reduce the errors from 10 to 5 in the new product feature.
- Starting 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 Sobject 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.



Sobject Update – One Sobject 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

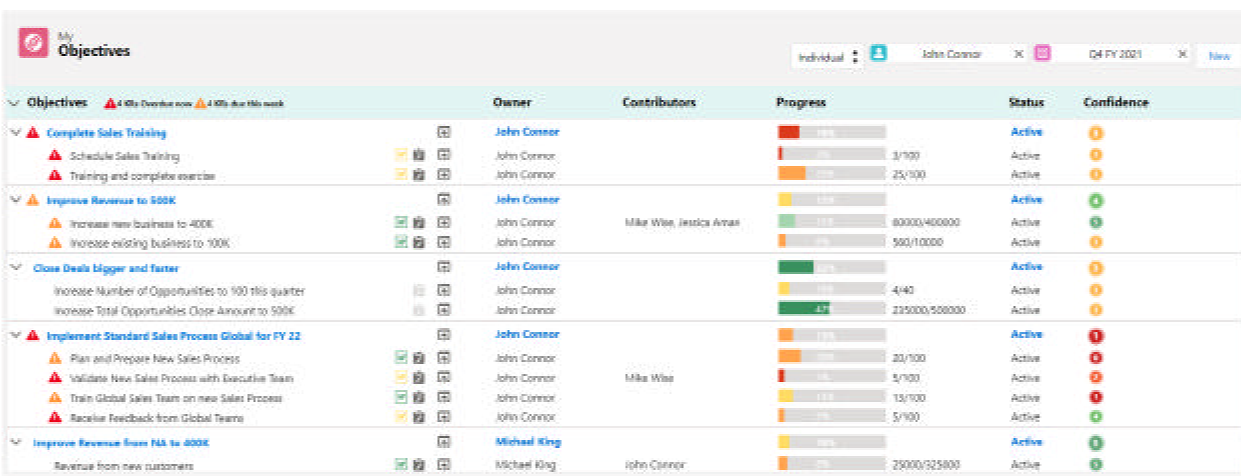
- Create OKR
- Track OKRs

- 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

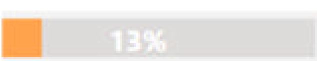
Click Expand Arrow  to view Key Results for an Objective or click the Expand Arrow on the top to expand all the Objectives.

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

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.

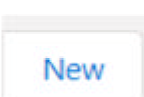

– Button to open the Key Result Update Screen. This icon will be active only if the user is an owner or a contributor for a Key Result. This icon is also disabled for Sobject Key Results as updates are automatic based on a Salesforce object. Hover over the icon for a Key Result to view the reason why 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.

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



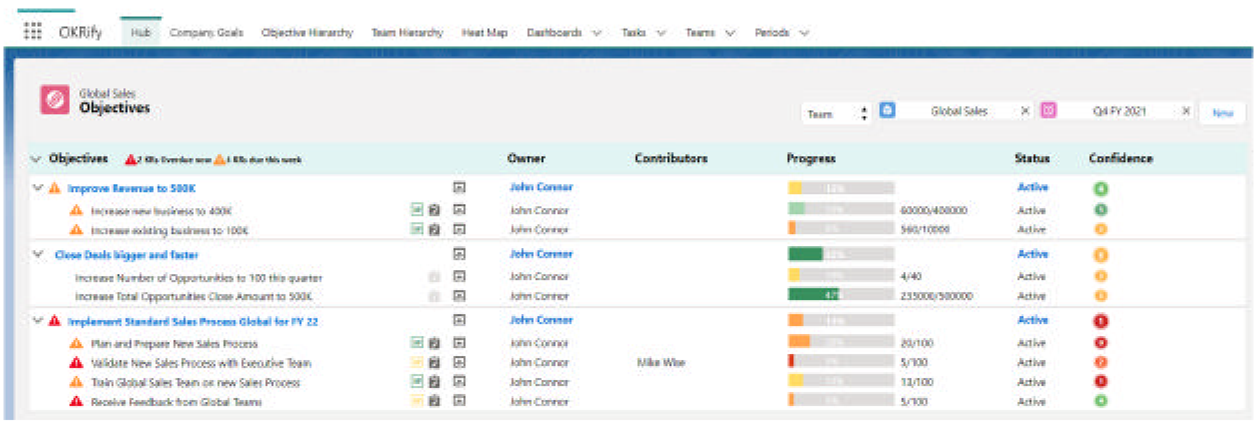
– Click the new button to create a new OKR

– Click an objective to view or edit an OKR

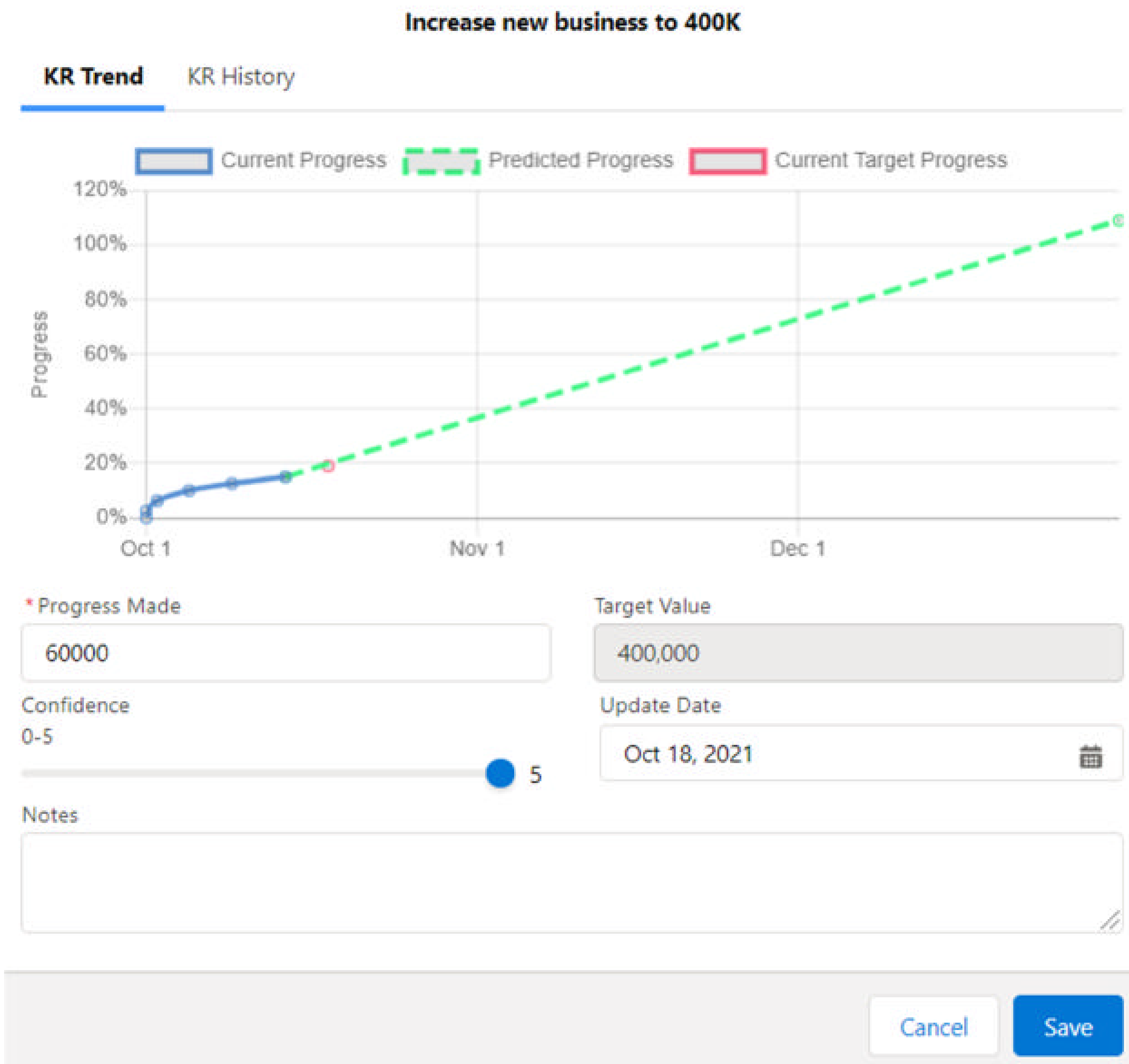
Update Key Result Progress

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.

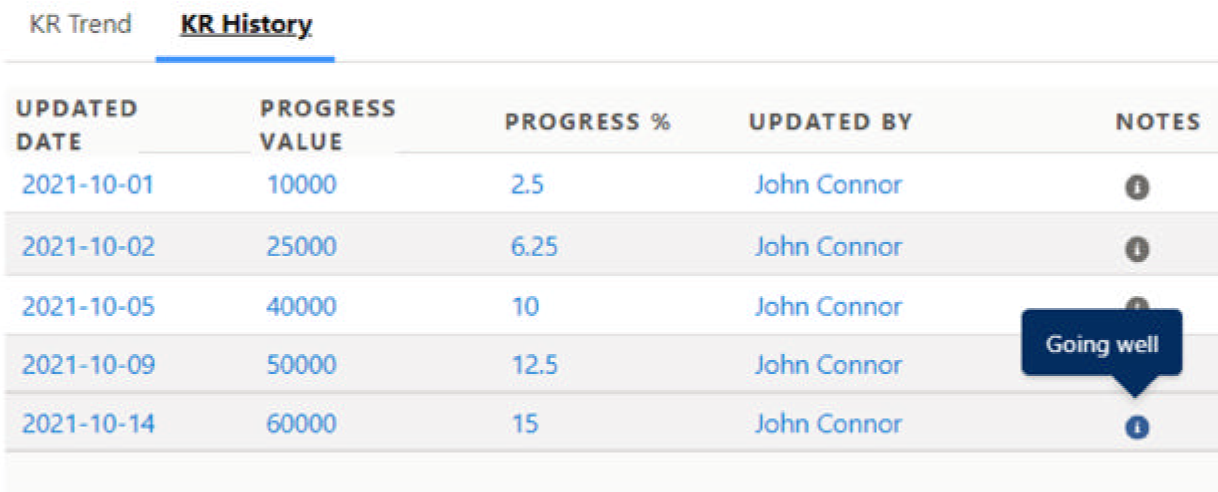
In hub, click  to open the Key Result Update Screen.



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 %.



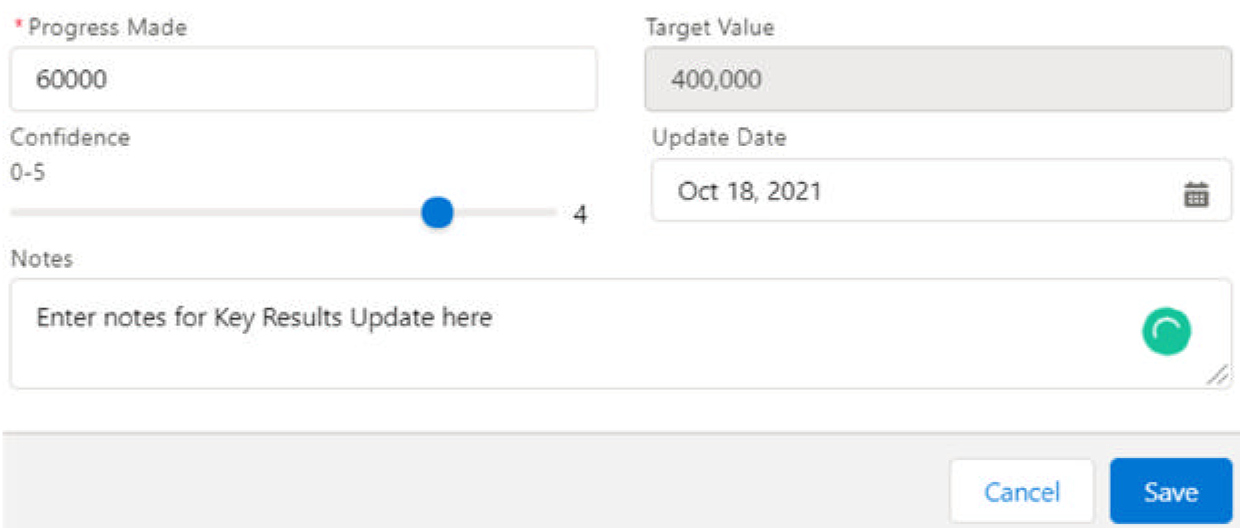
Click KR history to see the KR progress updates as a table, the notes entered during the updates are visible on hover over the i icon.



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	

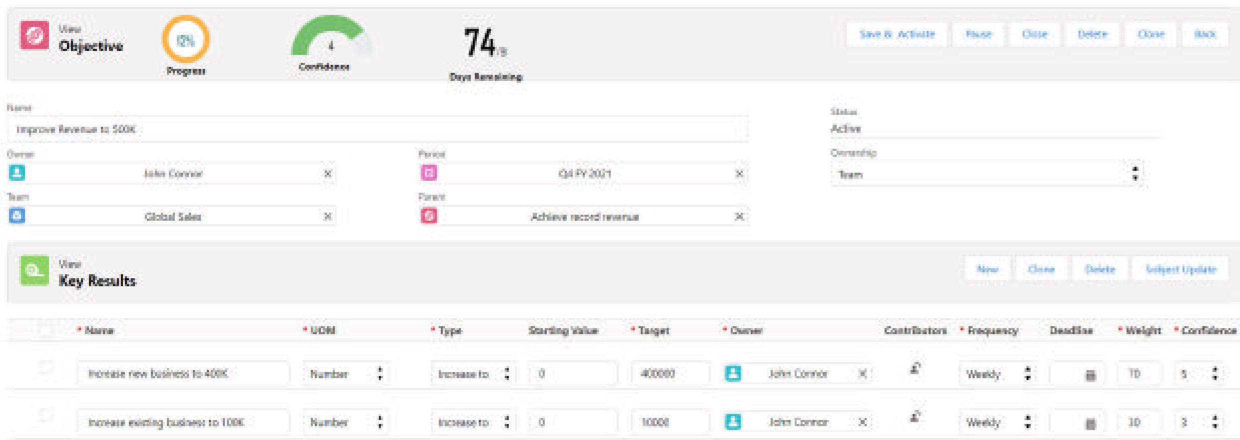
Enter the current progress value in the Progress Made field, update the confidence with the user's current confidence on reaching the target with 5 the highest confidence and enter the notes for the KR progress update. Click Save to save the update. Progress for Key Result, Objective and Team will be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



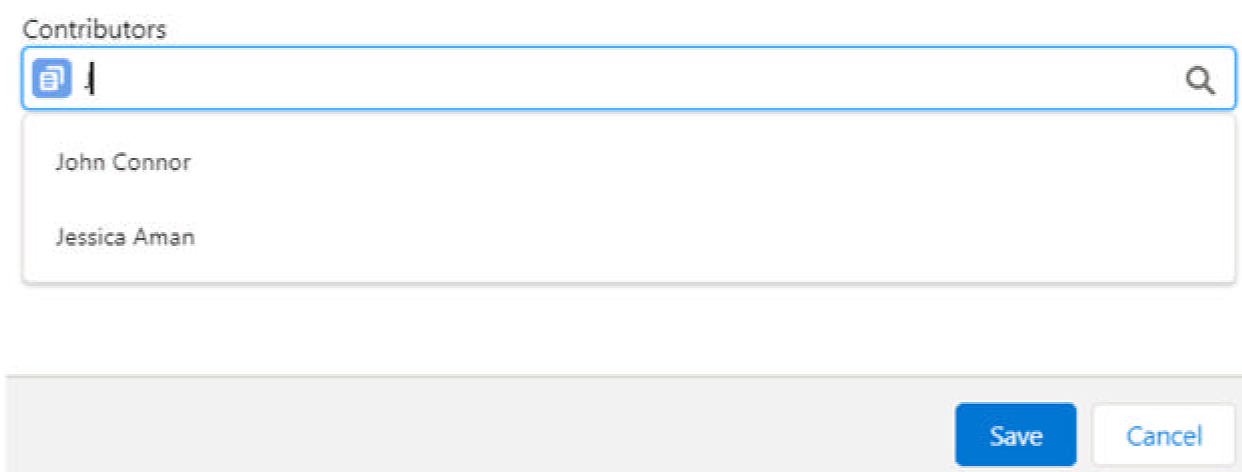
Add Contributors for Key Results

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.

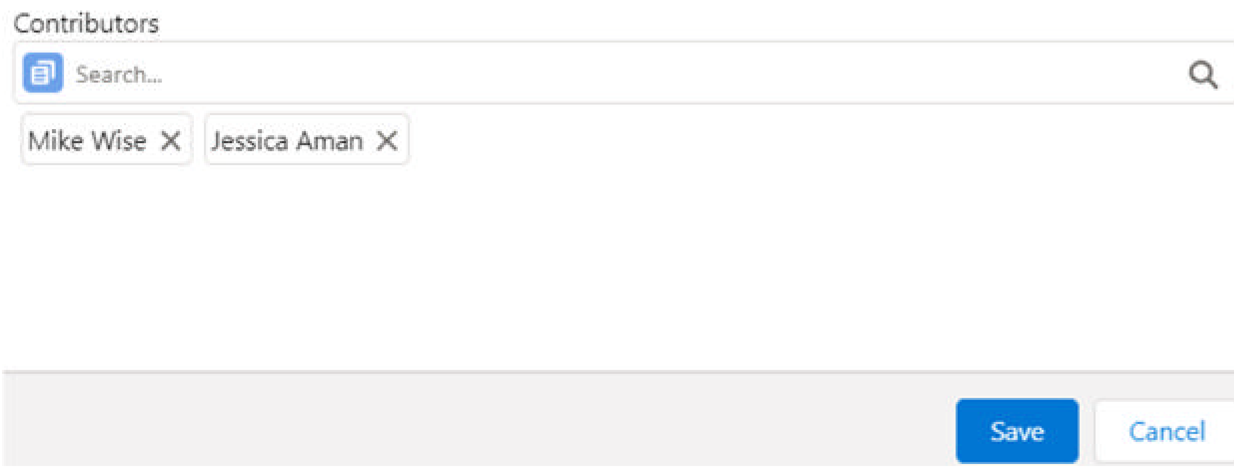
Click  to add contributors to a Key Result.



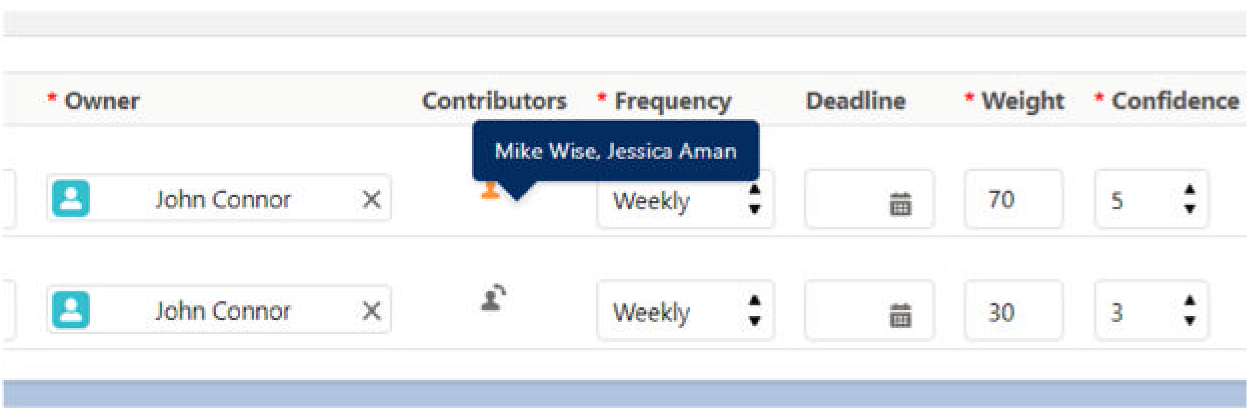
In the contributor pop up screen search for users and click to add multiple users to Key Result as contributors.



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



If a Key Result has contributors then the icon 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.

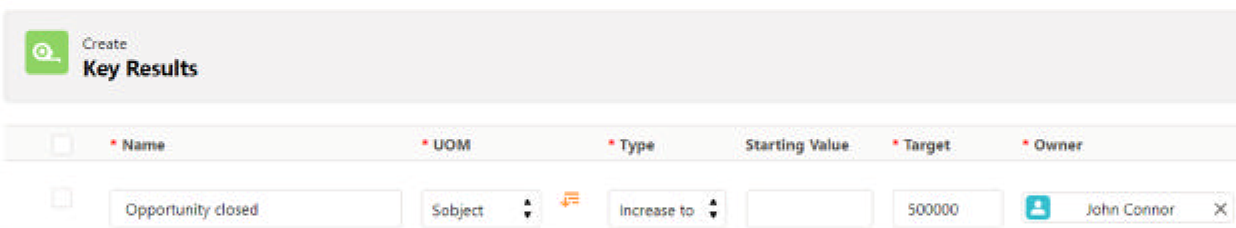


In Hub, contributors can also be viewed as shown below.

Create Sobject Key Result

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

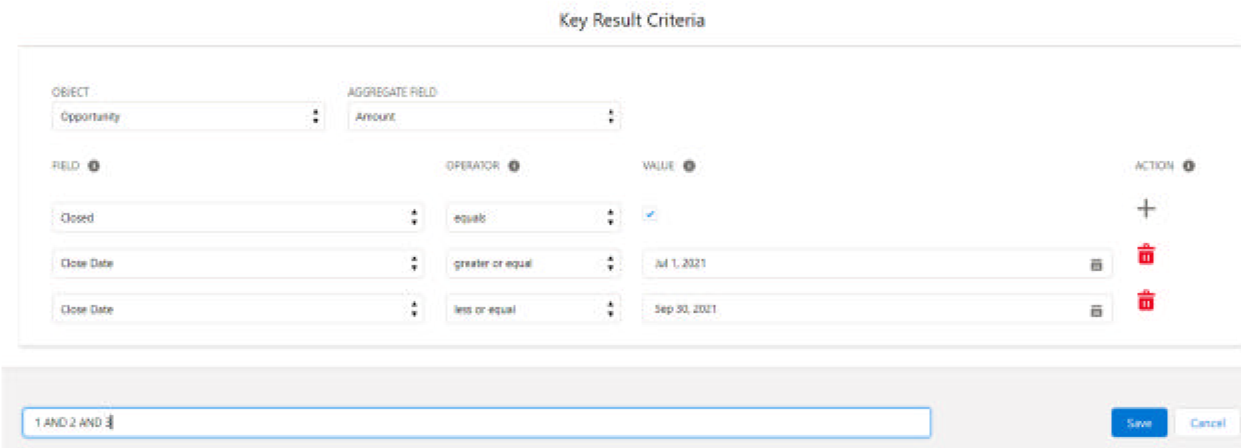
An Sobject Key Result can be created by selecting Sobject in the UOM field of a key result, selecting Sobject will enable the icon to open the page to set up the details of the Salesforce Object, field and filters needed for automatic key result progress update.



In the Key Result Criteria page enter the following information

- Object – Salesforce Object that needs to 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

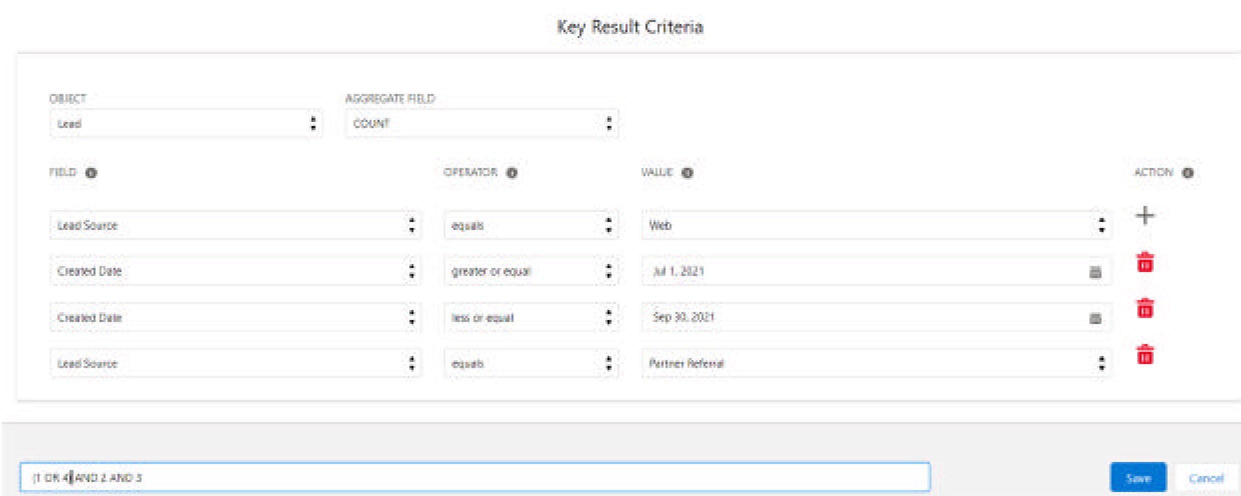
Click here to see information how to set up a salesforce object for Sobject Key Result.



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

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

Example with count



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 Sobject key result and can be set up in minutes which will automatically update.

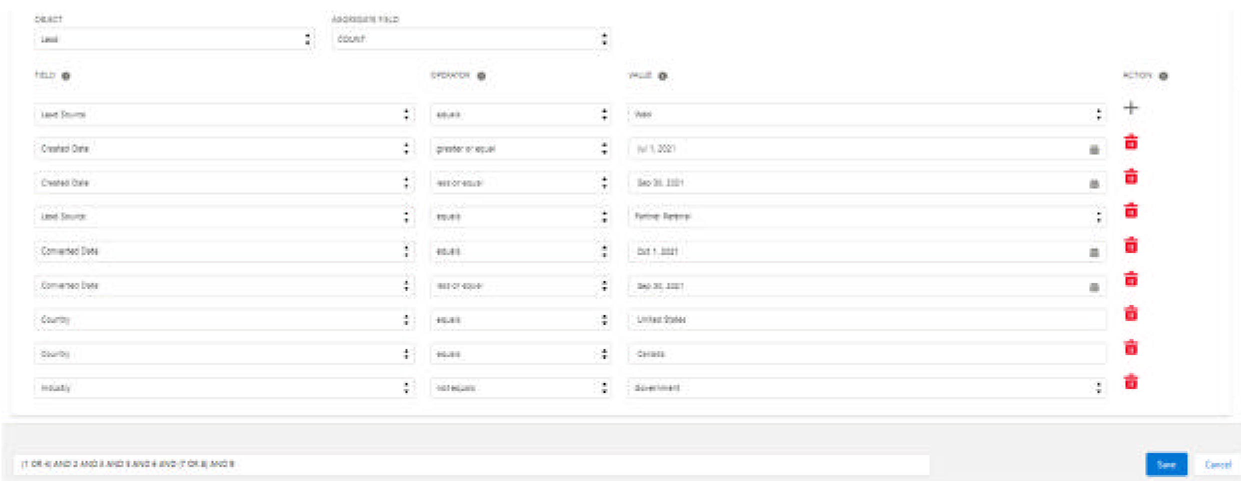
Related links

- Create Sobject Key Result with complex filters
- Create OKR
- Check errors for Sobject Key Result Update

Create Sobject Key Result with complex filter condition

For information on how to create Sobject Key Results click here. Here we will see how a Sobject with complex filter conditions can be easily created.

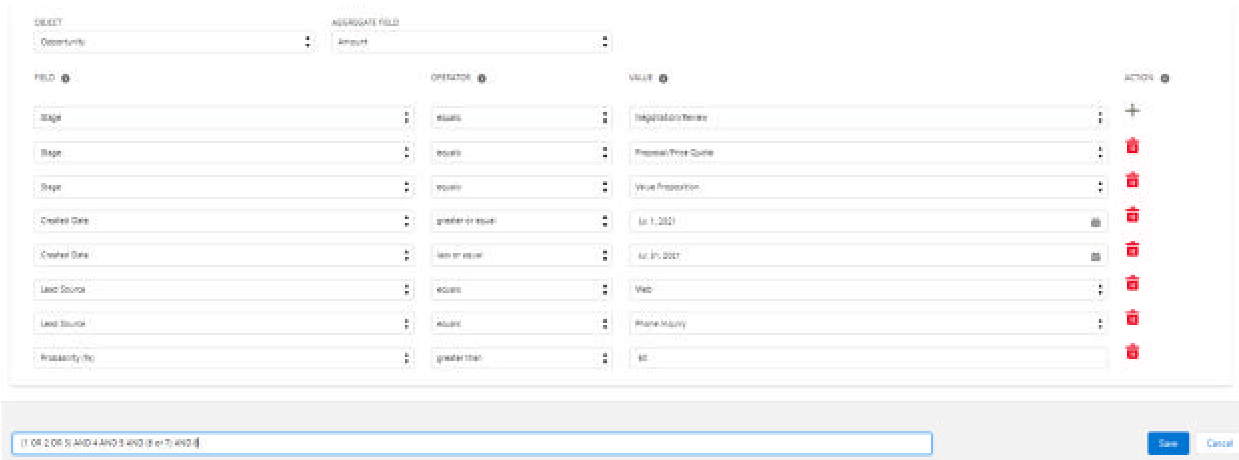
In the below example, the Sobject Key Result will automatically track the number of leads based on the condition provided. Sobject allows you to create multiple filters and set filter conditions to meet your business requirements.



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,



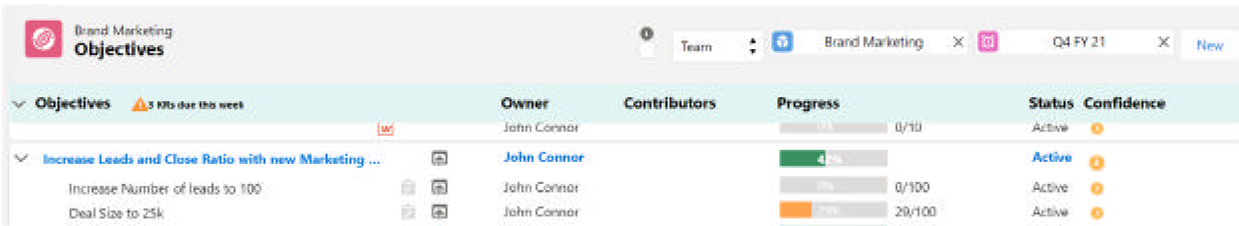
In the above example, the opportunity amount is aggregated for the Key Result and updated automatically daily. As per the conditions, opportunities in stages Negotiation Review, Propose/Price Quote, Value Proposition created in July 2021 from Lead source from Web or Phone Inquiry with probability % greater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

Update Sobject Key Results Ondemand

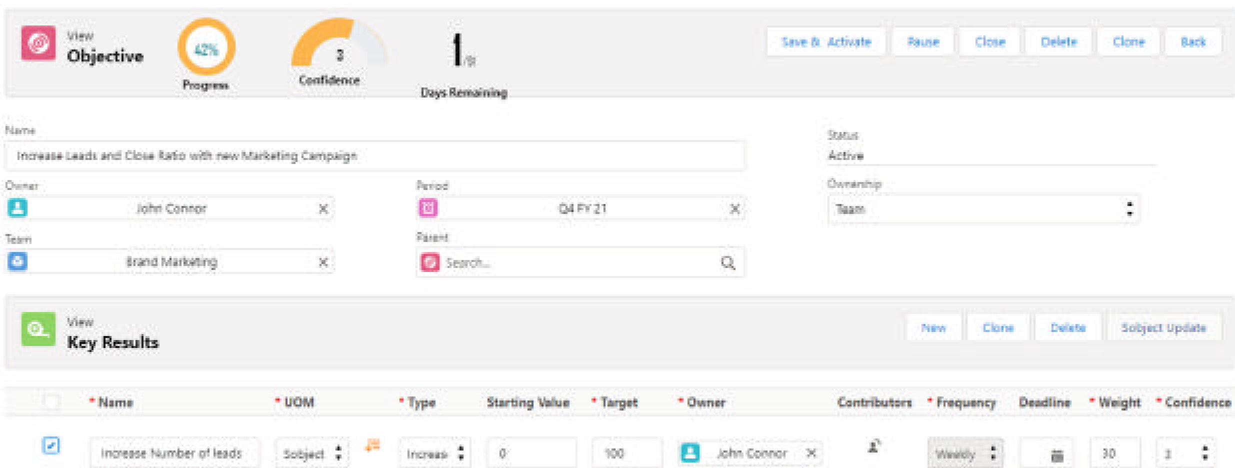
Sobject Key Results helps to reduce the manual effort required for updating a Key Result's progress. Sobject Key Results are updated periodically by a batch program which can be scheduled to run as per your organization's needs. Additionally OKRify also provides the ability for a user to update a Sobject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

To update an Sobject Key Result ondemand

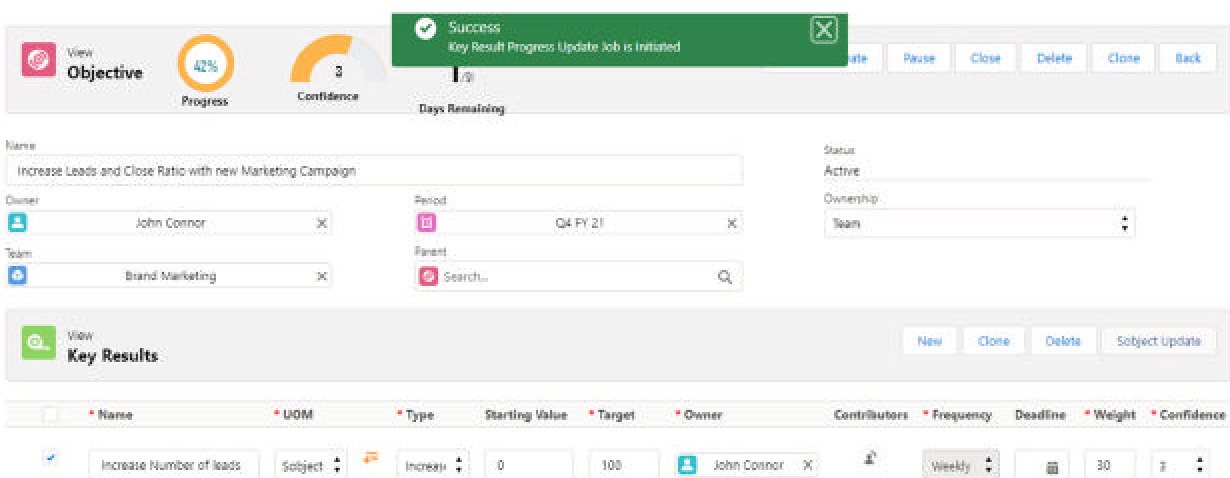
- Go to hub and click on an Objective to go to the Edit/View Objective page



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



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

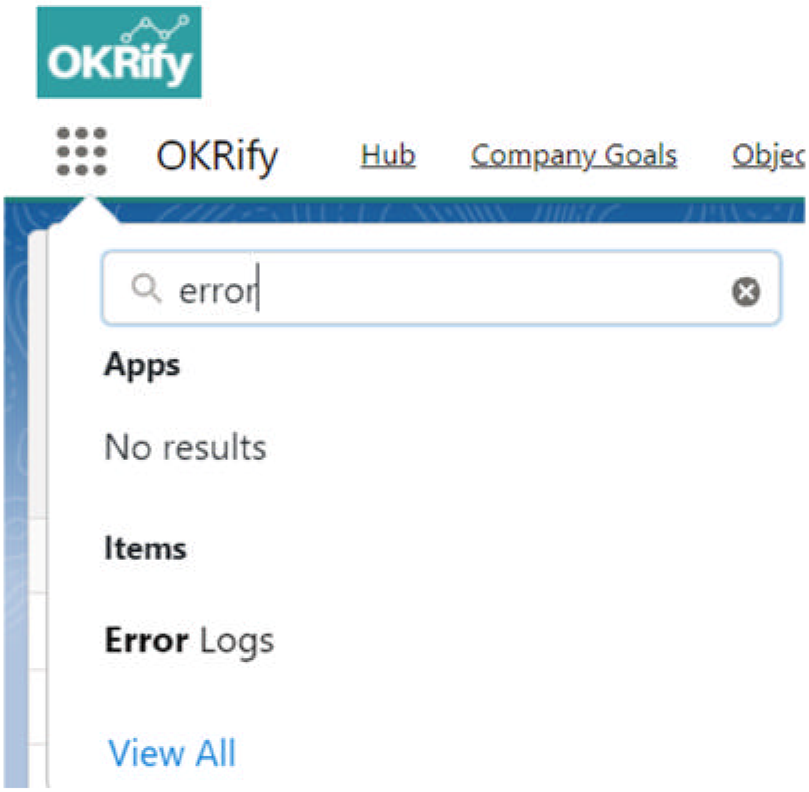


Check the updated progress in Hub. If there are errors in the Key Result information page as shown here.

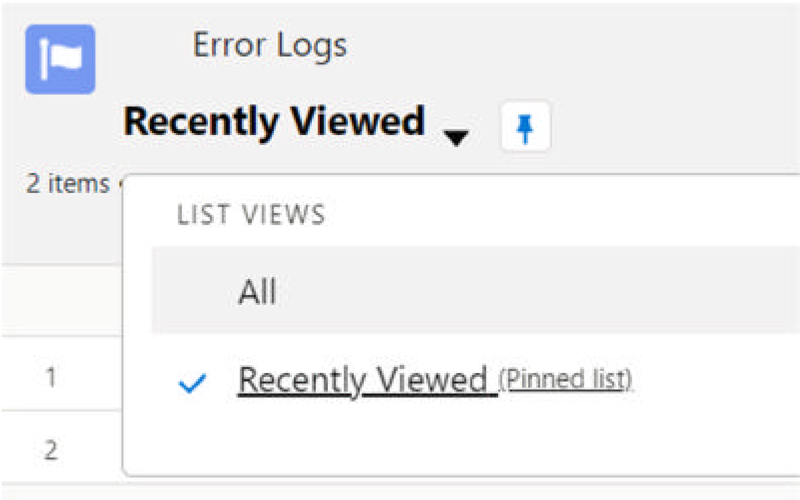
Check Sobject Error Logs

Sobject Key Results are updated automatically daily using a background program, incase 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.

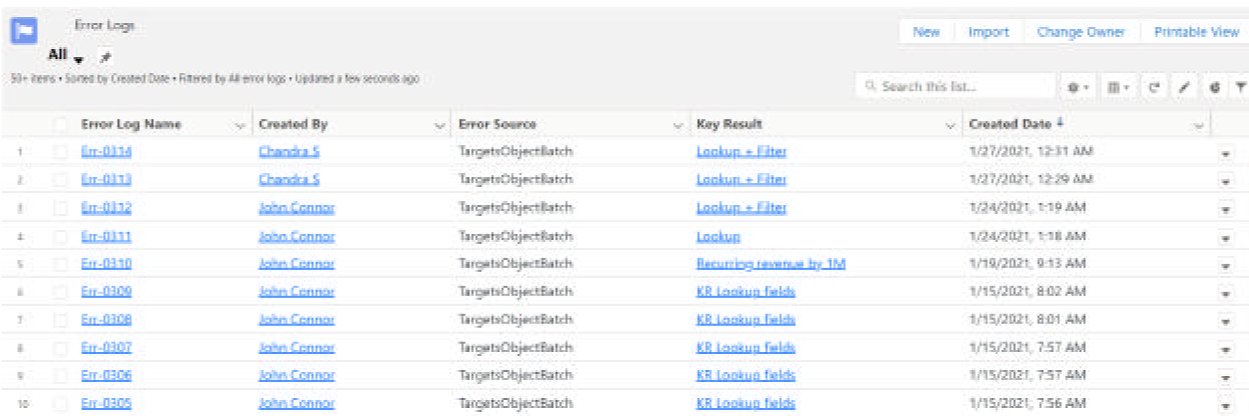
This error log can be accessed by clicking icon and searching for Error Logs in all tabs.



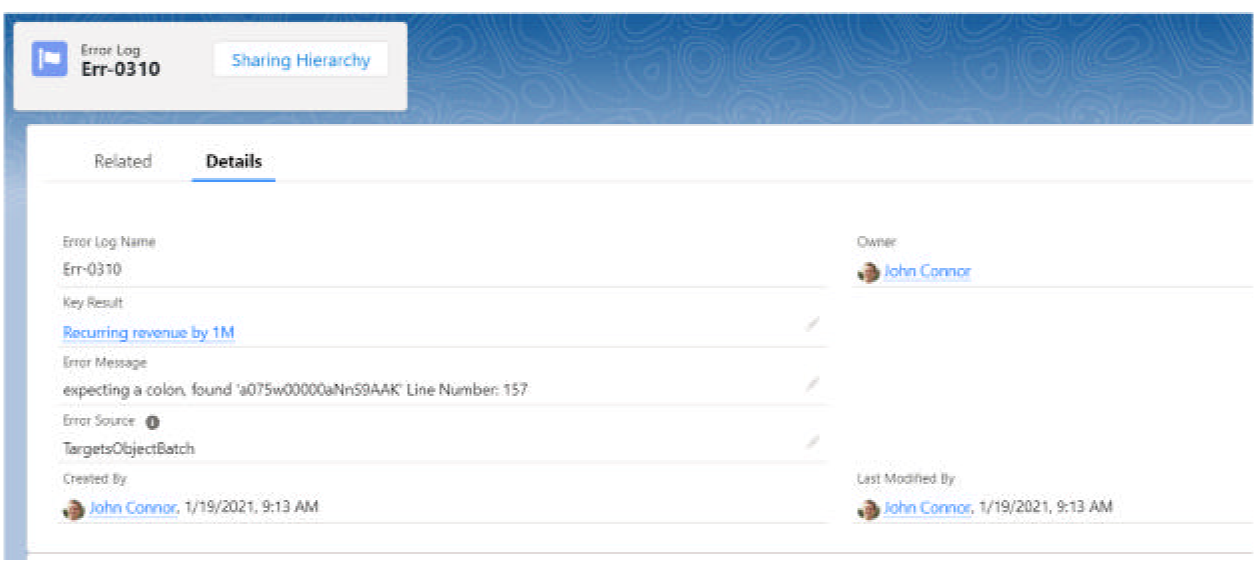
Click Error Logs. Click the drop down icon next to Recently Viewed and click All to see the all the errors.



Click an error to see the details of the errors.



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



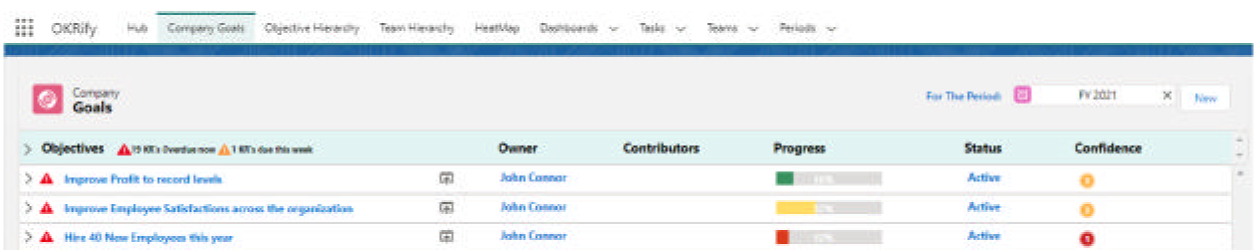
Contact your administrator or support@okrify.com incase of errors.

View Company Goals

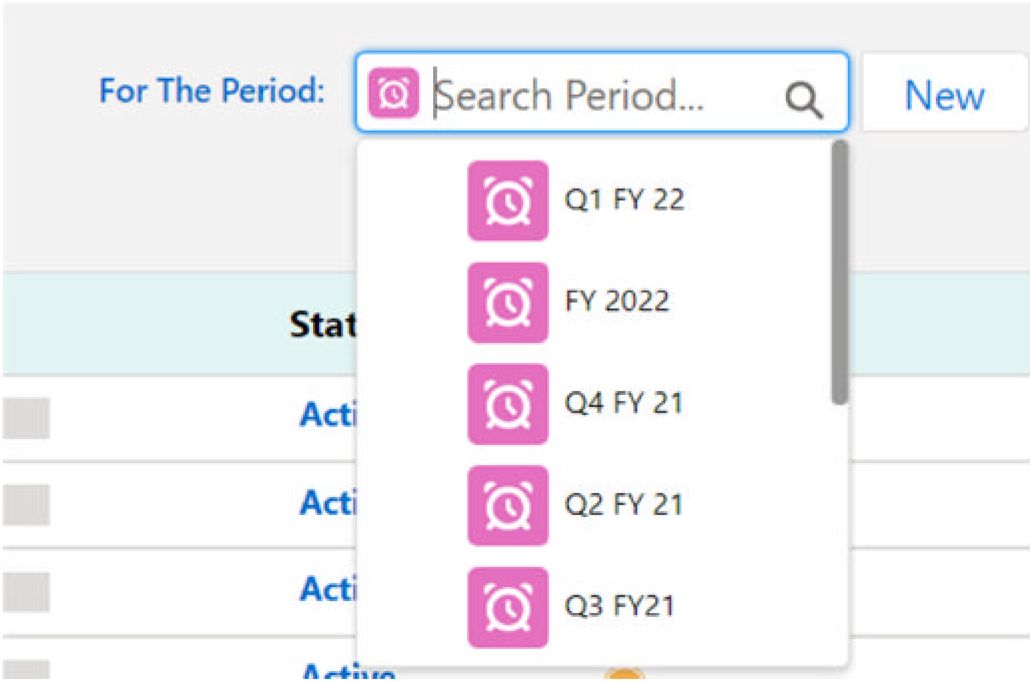
One of the key principles of the OKR framework is to align everyone to the Company's vision. OKRify enables this by providing a separate tab from company goals that is available to everyone with access to OKRify. Company tab works very similar to hub but only displays Company level objectives. Only owners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

To view company goals

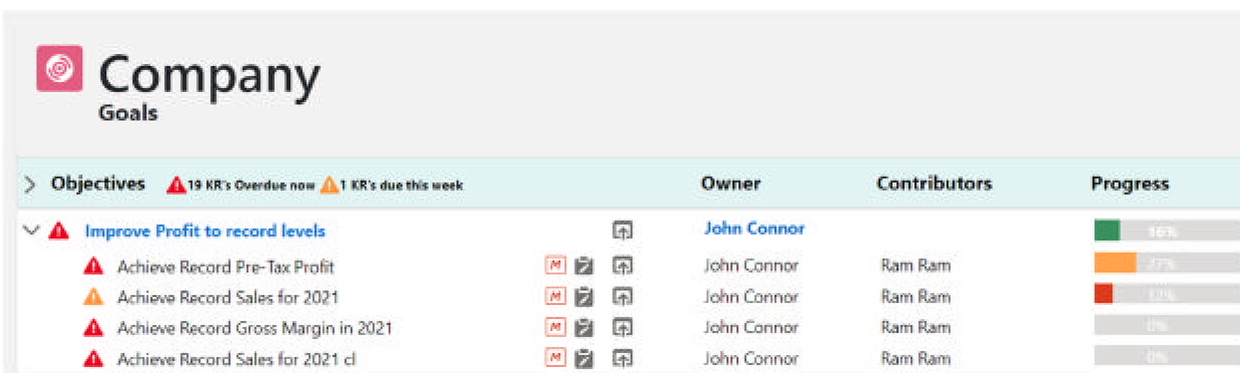
- Go to Company Goals Tab, all the company goals for the default period selected will be visible, the default period can be changed to other periods to view Company Goals for that period.



- 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.



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.

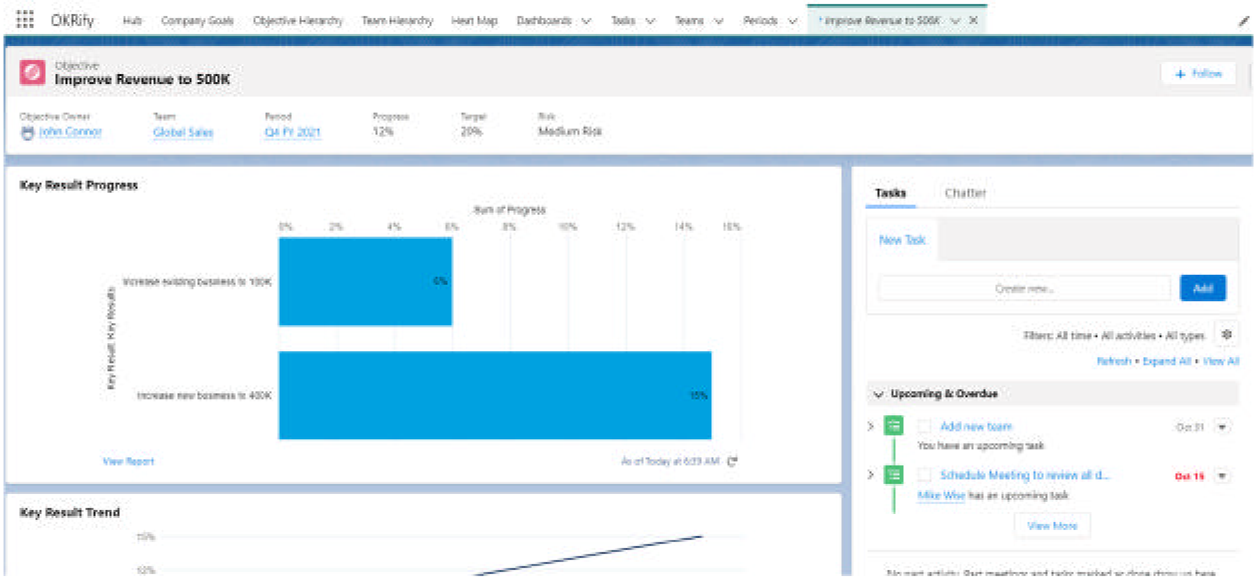
- Change Period if required, Period defaults to Current Period.

- Enter key results similar to any other objective. Click here for more information.

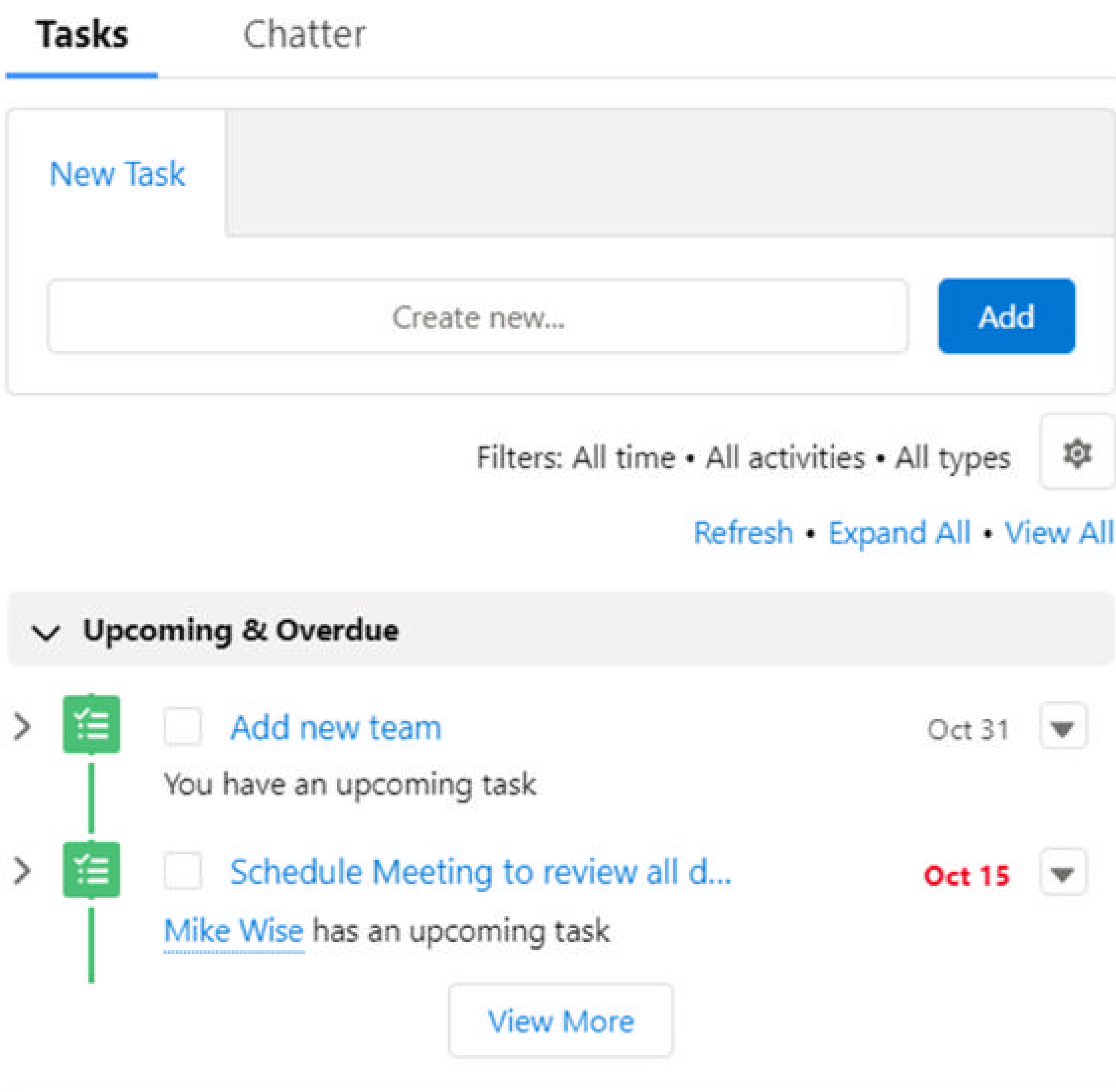
Create tasks for Objectives or Key Results

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.

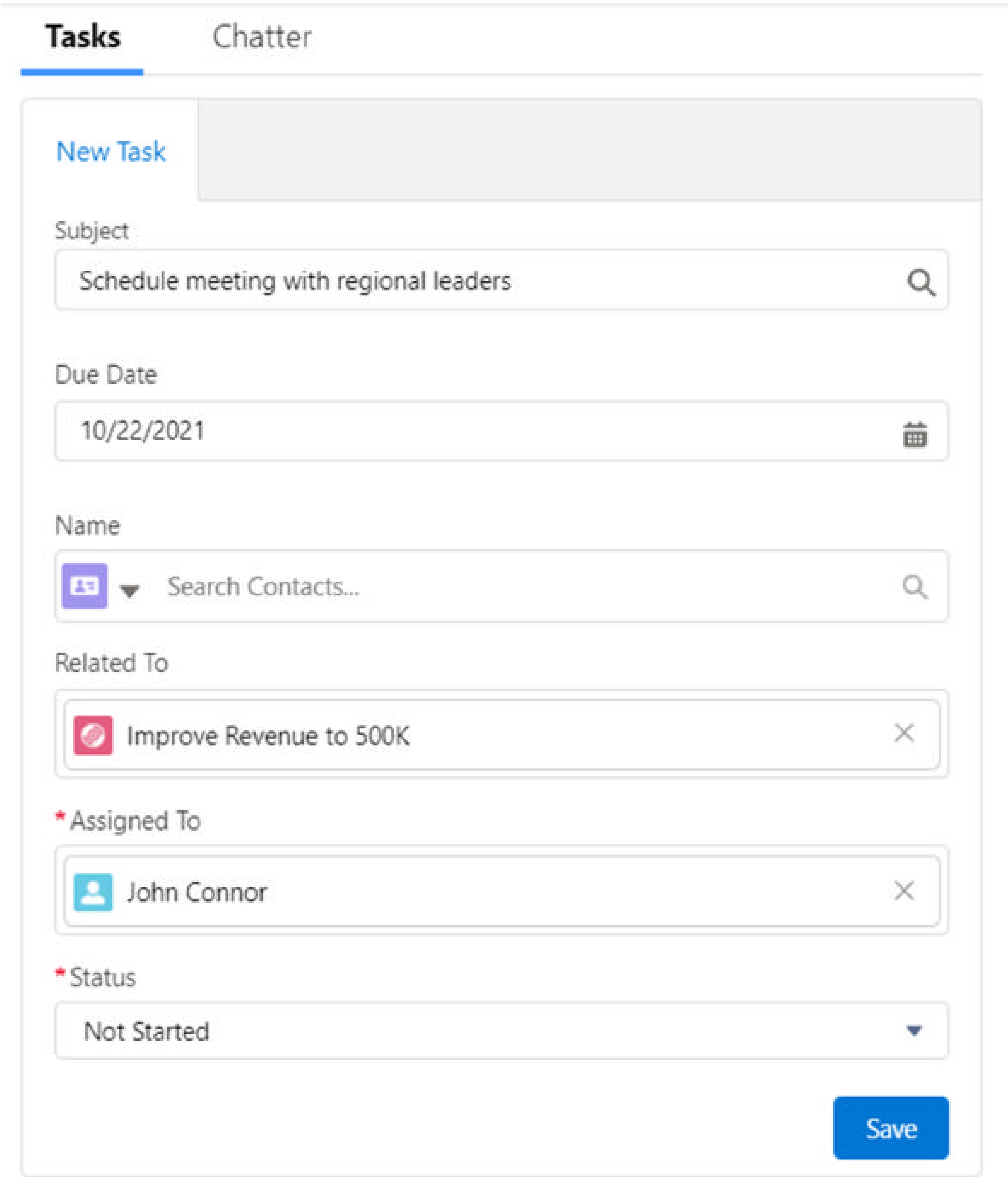


All the upcoming and overdue tasks can be viewed and a new task can be created by clicking ‘Create New’ button.

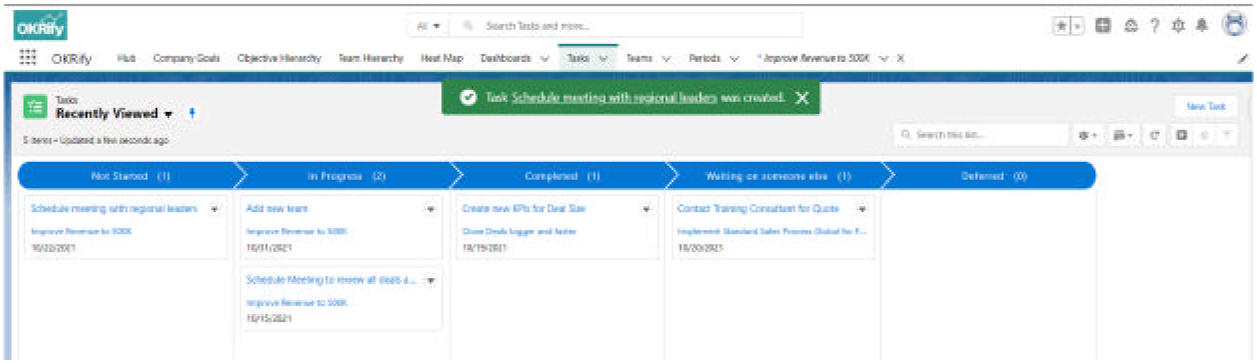


To create a new task enter the following information and click save to create a new task.

- Subject
- Due Date
- Assigned to
- Status



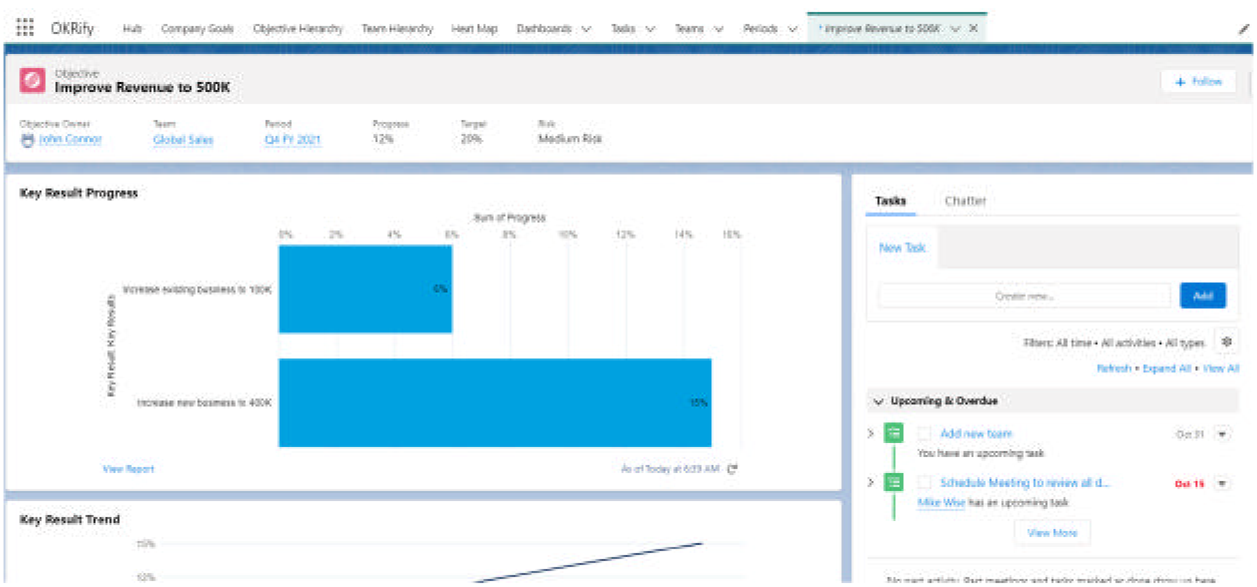
Tasks created are also visible in the Tasks tab and status can be easily updated by dragging the tasks from one column to another. (Tasks is tab for standard Salesforce tasks object)



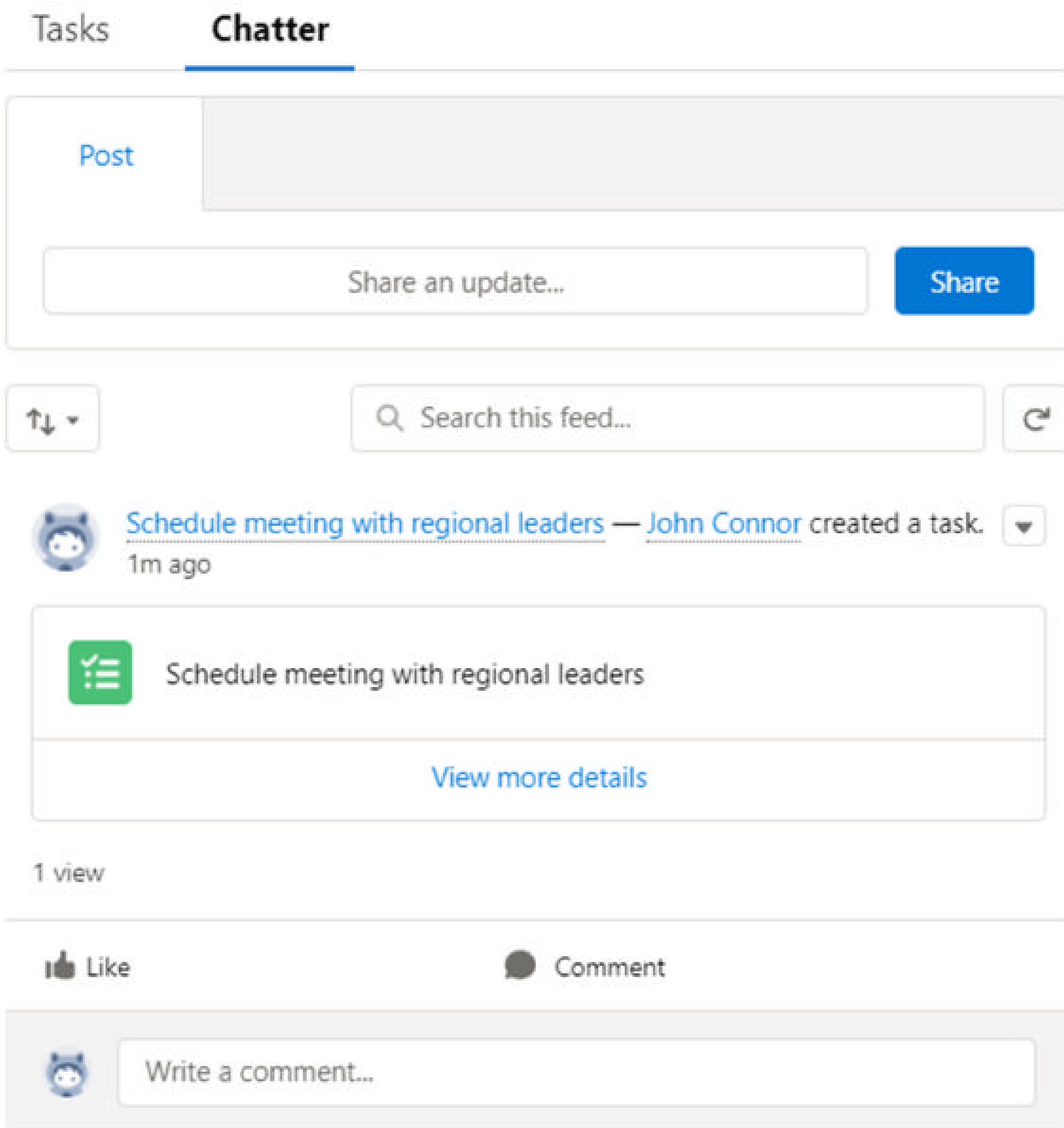
Use Chatter for Objectives or Key Results

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

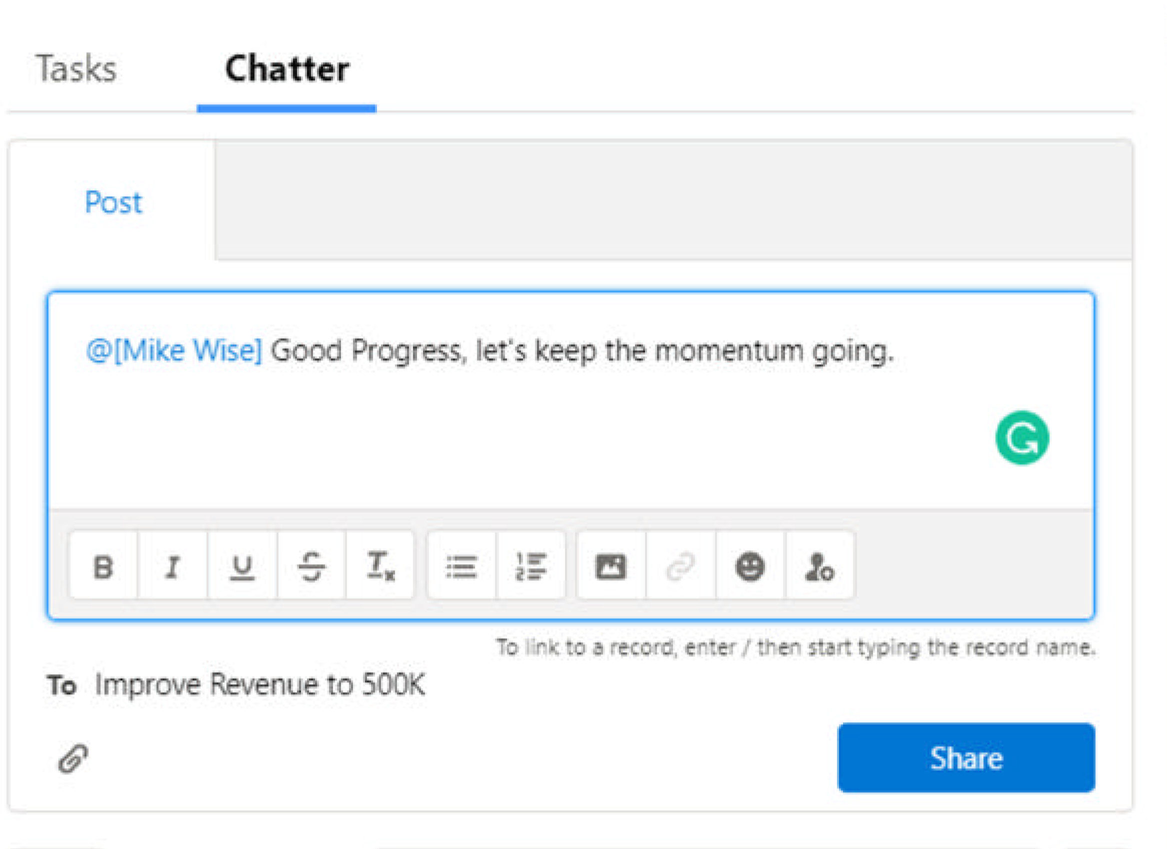
Click View Objective/Key Result icon from the hub to go to the objective or key result record page, in the record page go to Chatter Tab next to Tasks to use Chatter feature for an objective or key result.



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’.



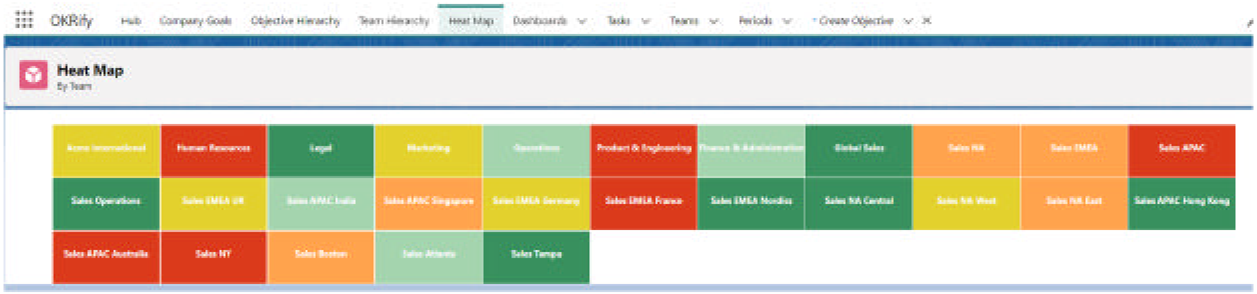
Enter the message, users can also be tagged in the Chatter message and post the message. This message will appear in the user's chatter messages along with the Objective/Key Result view page.



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.



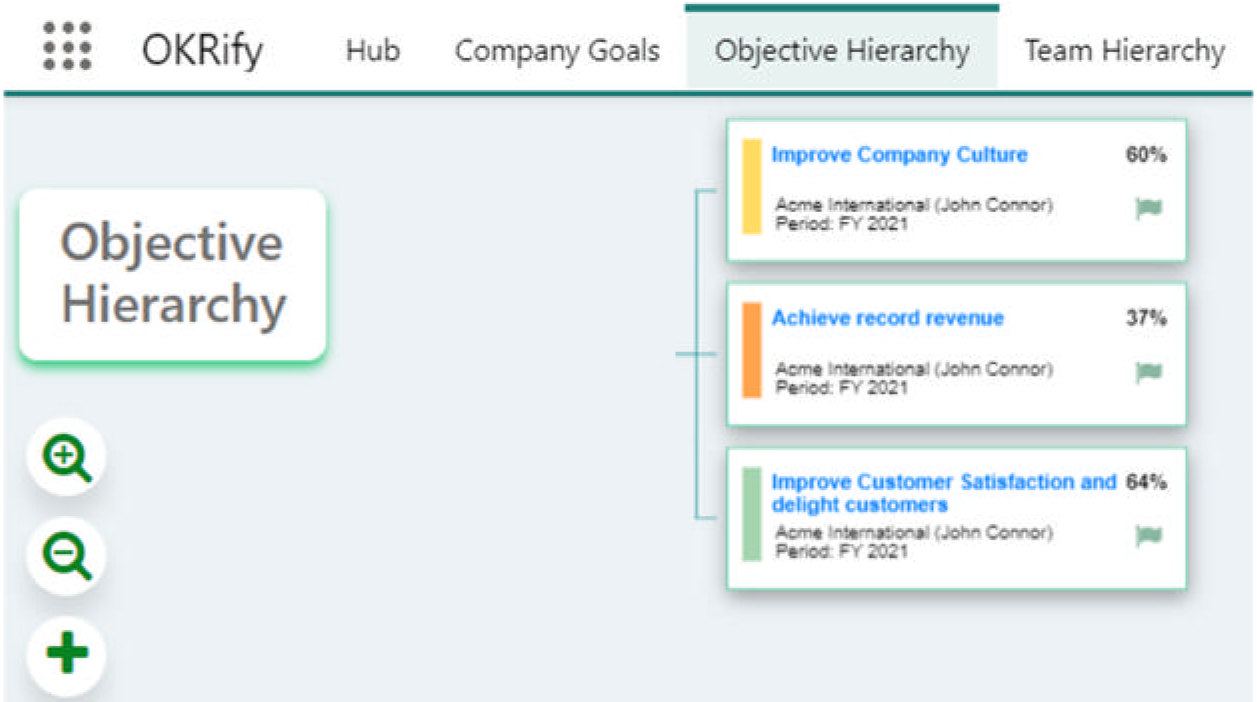
Clicking a team will open the hub for the selected team and display the OKRs for the team for the current period.

Navigate Objective Hierarchy

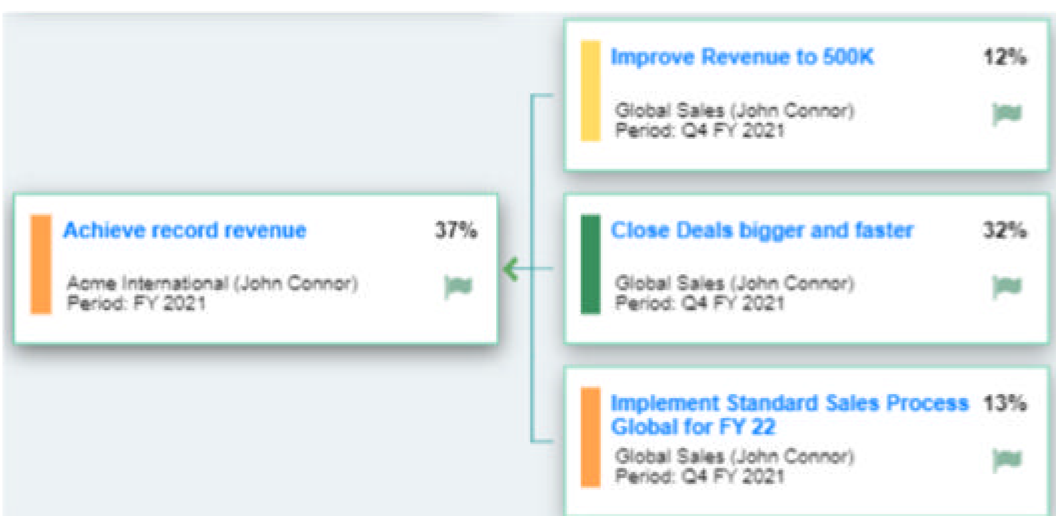
Objective hierarchy shows how team and individual objectives are aligned with company goals, all objectives that are aligned to the company level objectives or an objective aligned to the company level objectives are shown in Objective hierarchy.

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.

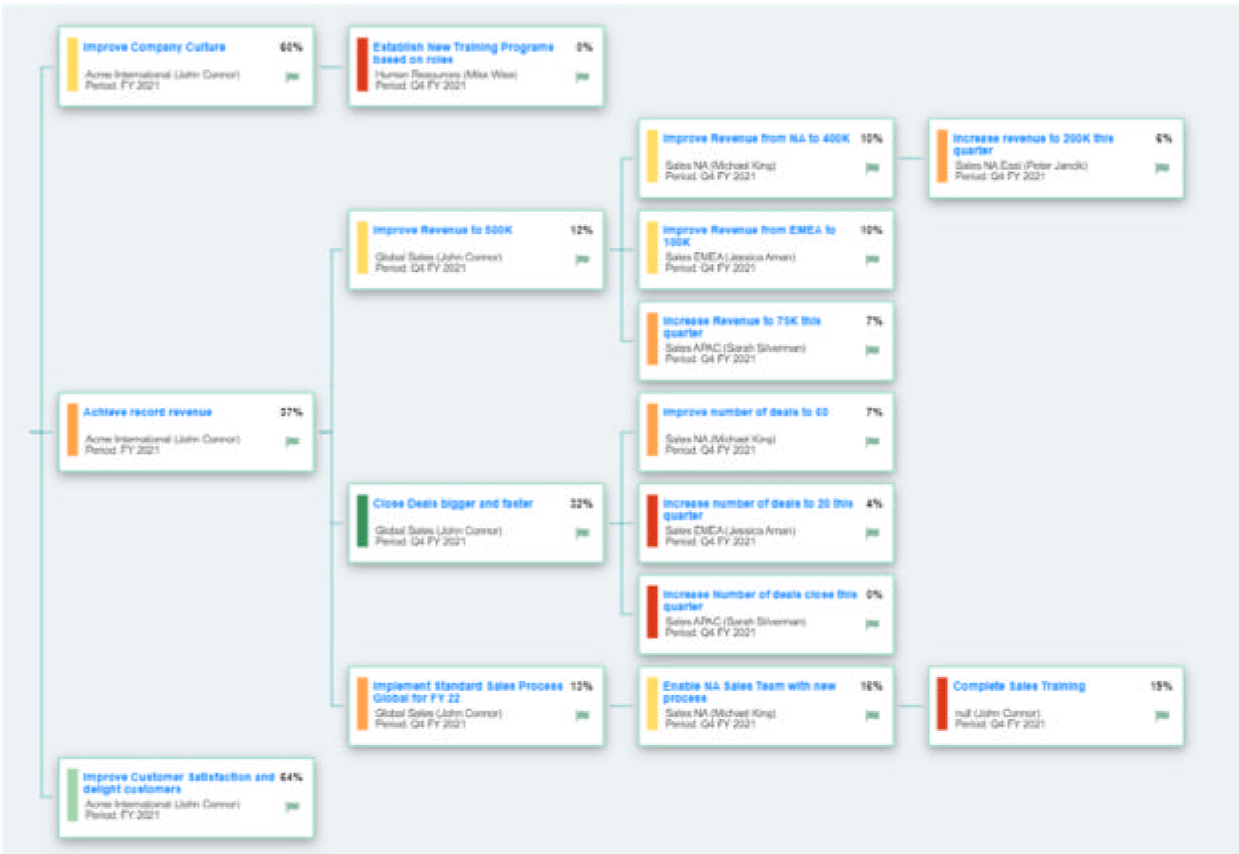
Objective hierarchy by default displays all the company level objectives for the current period and current FY. Each objective’s name and progress % are displayed and colored based on the objective’s risk level, also the objective’s team, Owner and Period are also shown for each objective.



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.

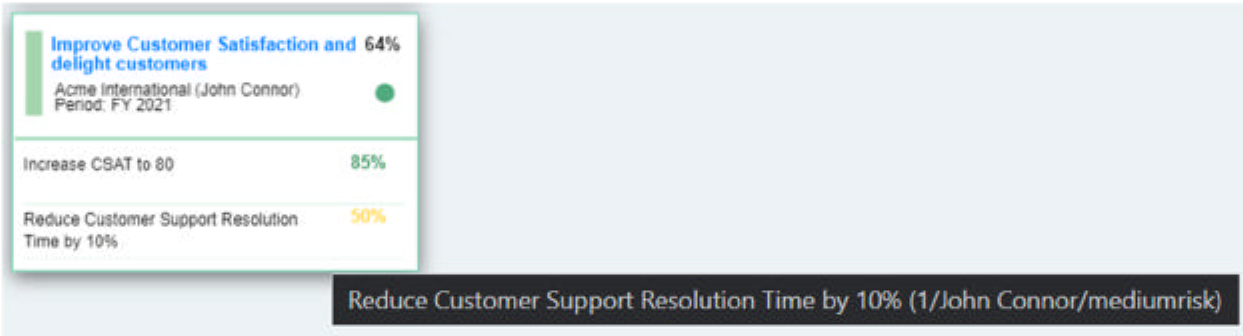


Expand All Button will expand all levels of objectives. Zoom in and Zoom out buttons are also available.



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

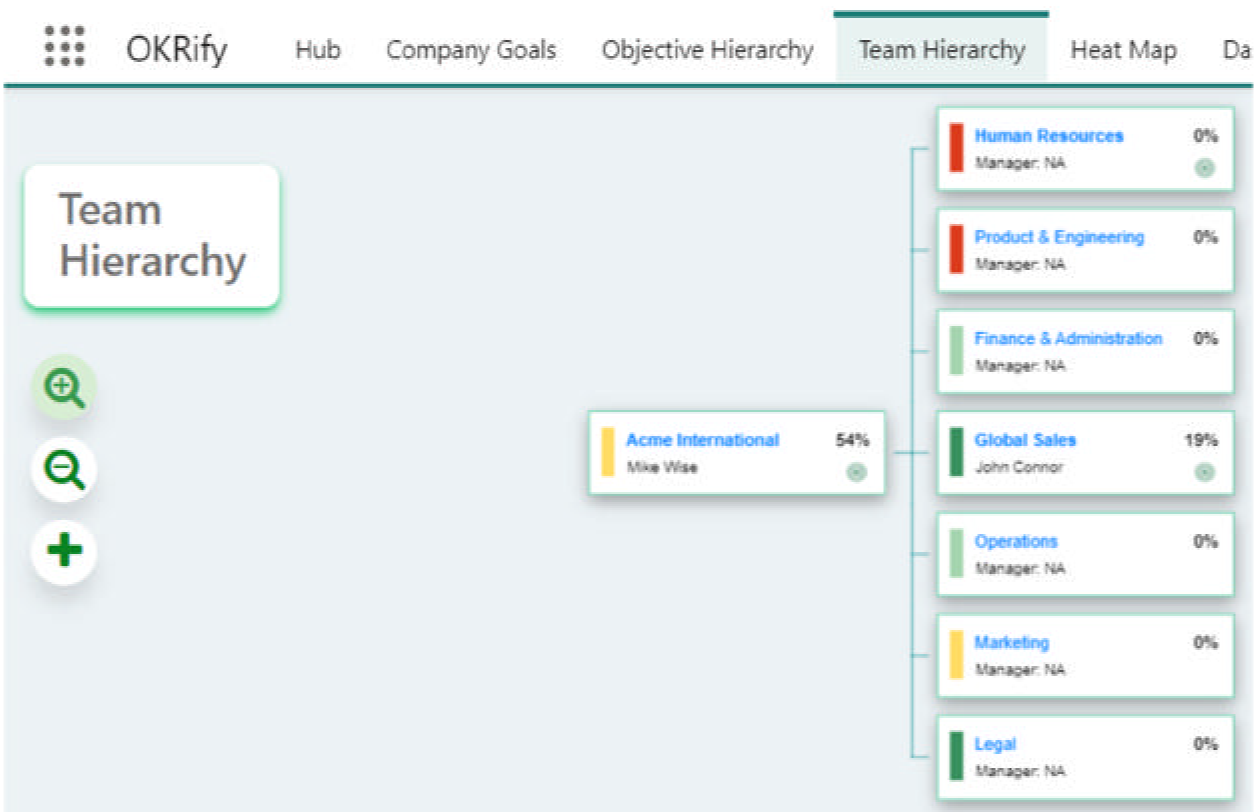
Hovering over a Key Result will display Confidence, Owner and Risk for the Key Result.



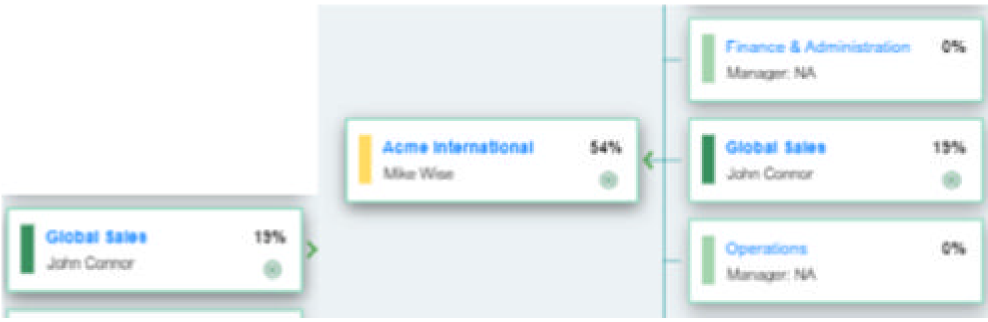
Navigate Team Hierarchy

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.

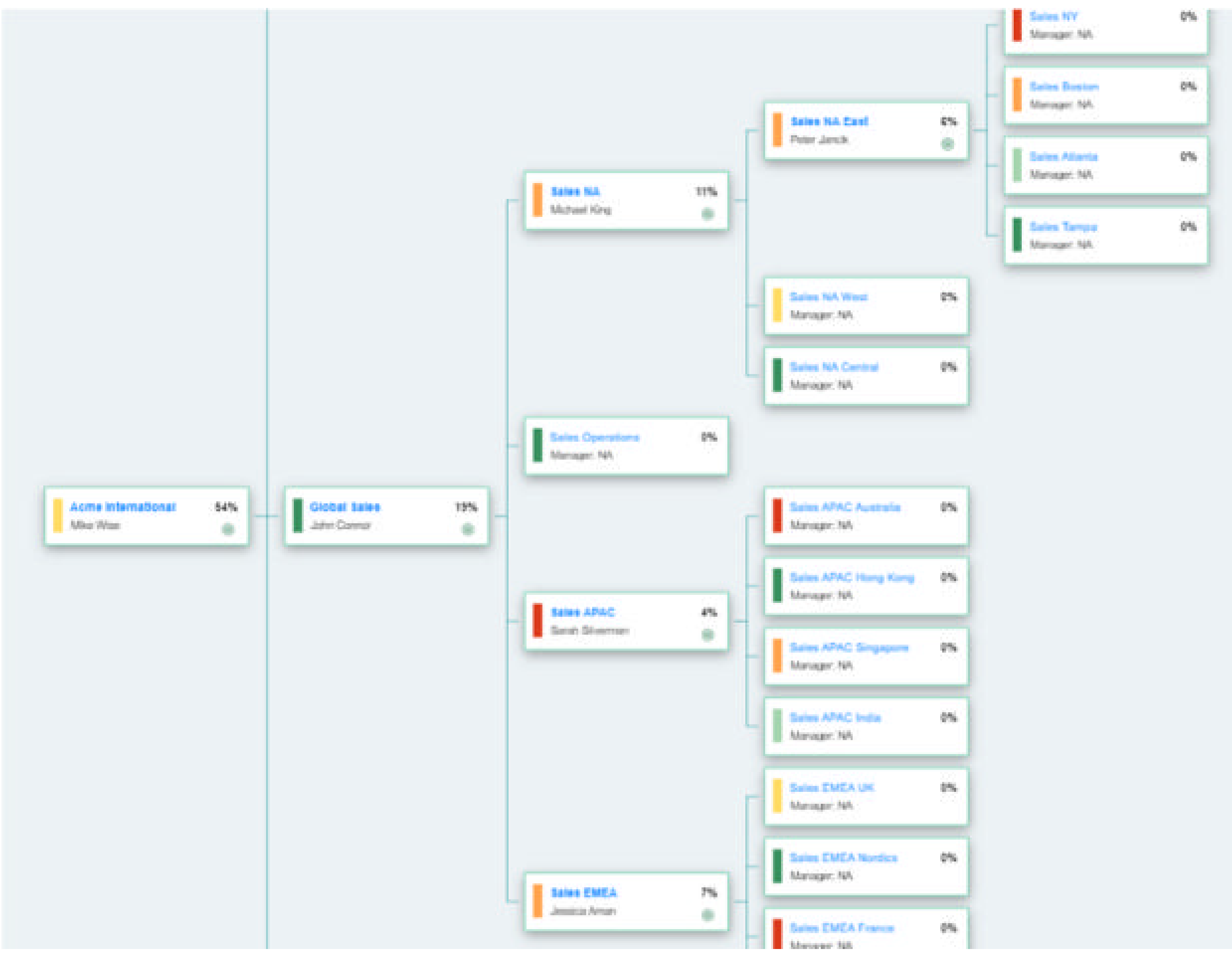
Team hierarchy by default displays the main team for the organization and the next level of teams that are aligned with the main organization. Each team's name and progress % are displayed and colored based on the team's risk level, also the team's manager is also shown for each team.



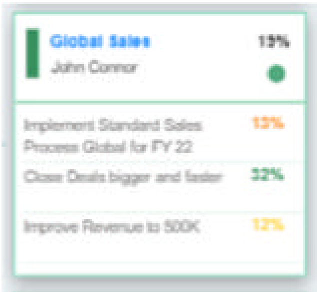
Next level of teams can be viewed by clicking the expand button for each team. Expand and Collapse icons can be used to view different levels of teams.



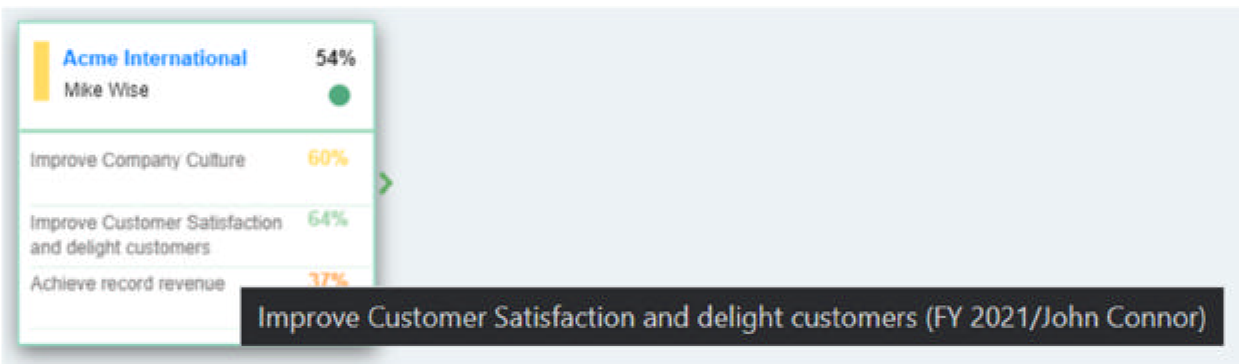

Expand All Button will expand all team levels with one click. Zoom in and Zoom out buttons are also available.



 – 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.

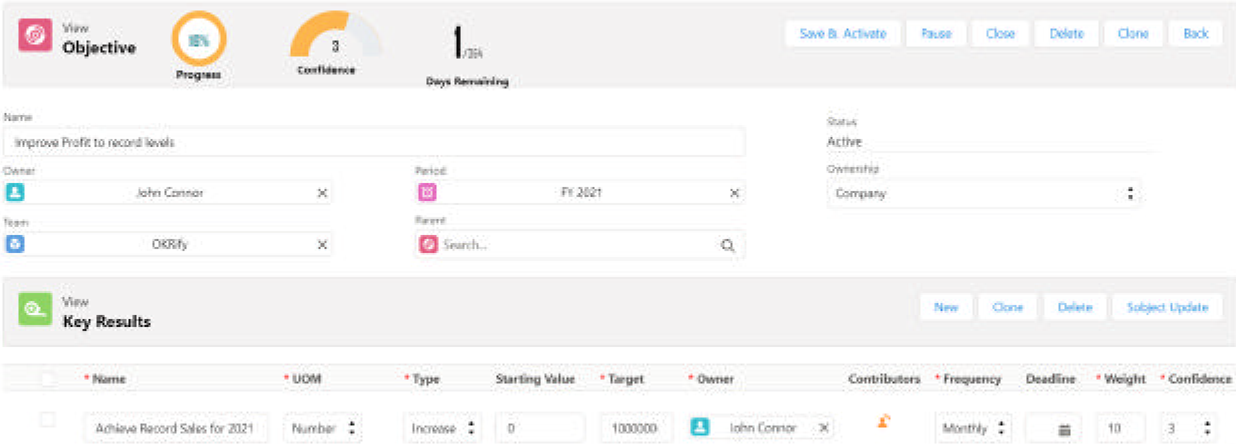


Clone OKR

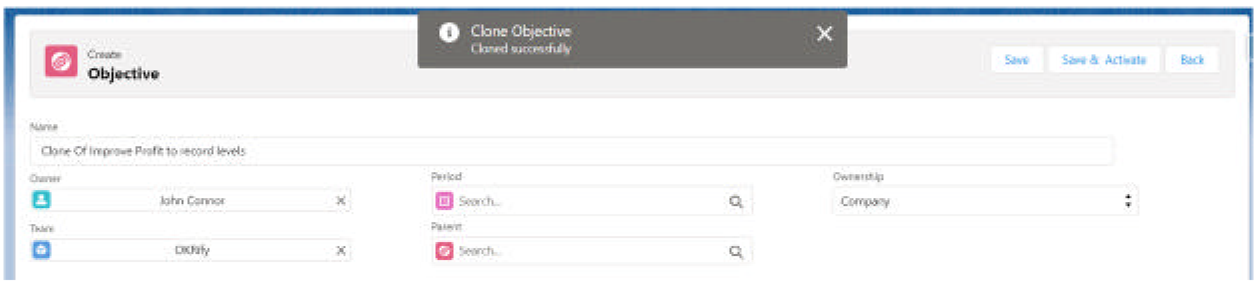
OKRify provides the ability to clone both objective and its key result with a single click. This will reduce the time taken to set up OKRs if the same OKRs are extended beyond a period or OKRs are similar for two teams or individuals.

To clone an objective and its key result,

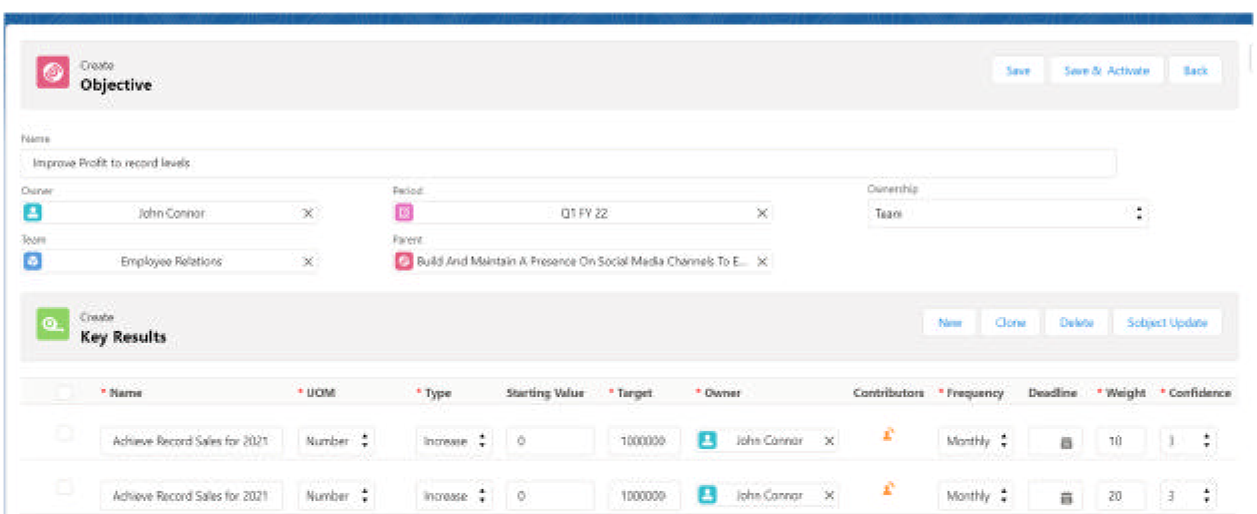
1. Go to the Edit/View Objective page by clicking on an objective from Hub or Company Goals.



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



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

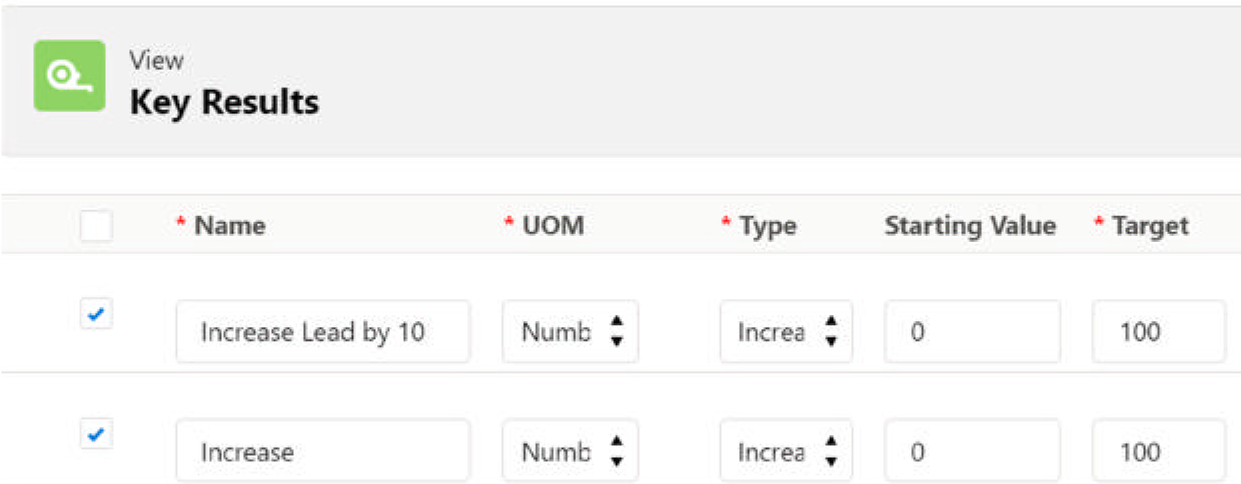


Clone Key Result

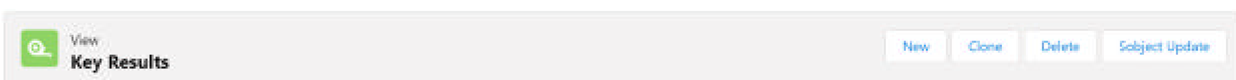
OKRify provides the ability to clone key results when creating an OKR and save manual effort required for similar key results in an objective.

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

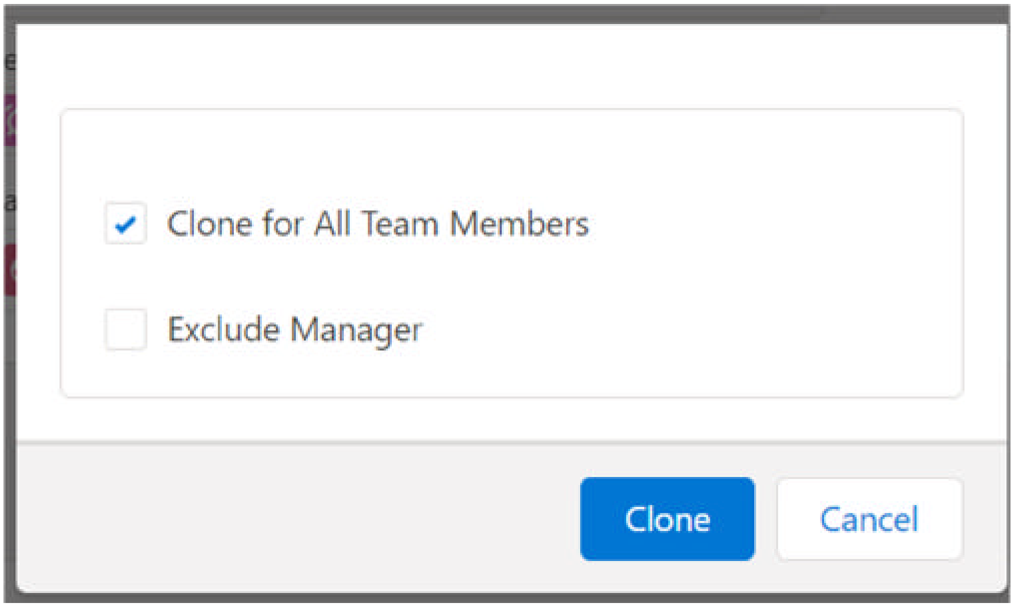
- Select the key results that needs to be cloned



- Click clone button



- 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.



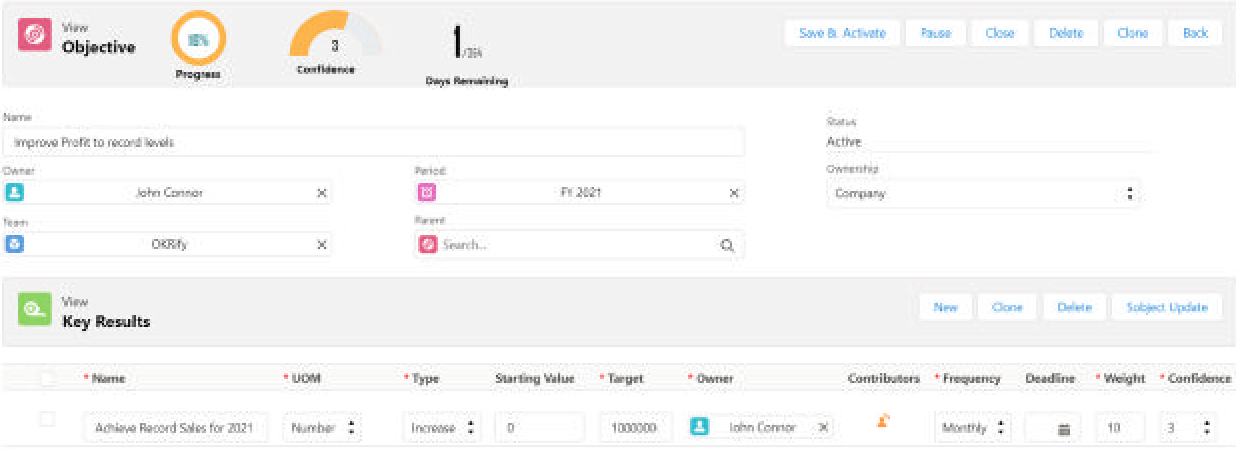
- Select Key Result will be cloned.

Pause and Unpause OKR

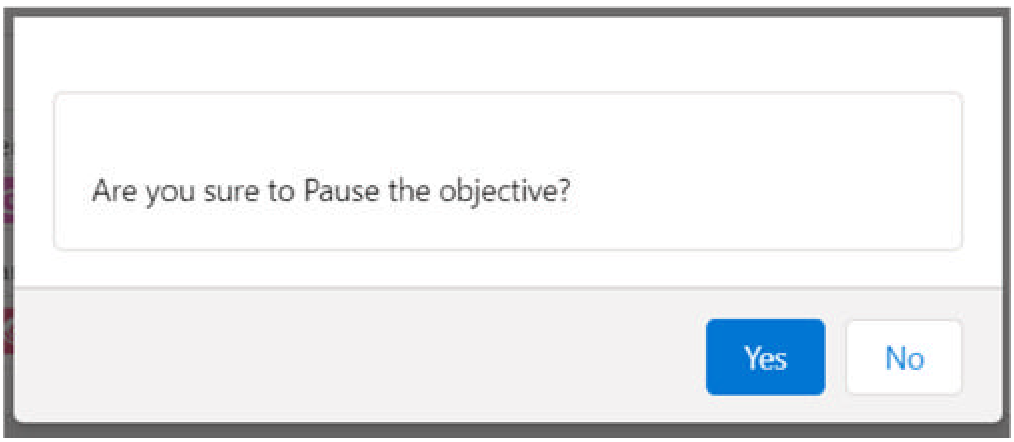
Sometimes OKRs needs to be paused to review the objective or for a change in the direction, OKRify provides the ability to pause an active objective. Key Result progress cannot be updated for a paused objective. Paused objectives can be unpaused which will enable key result progress updates.

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.

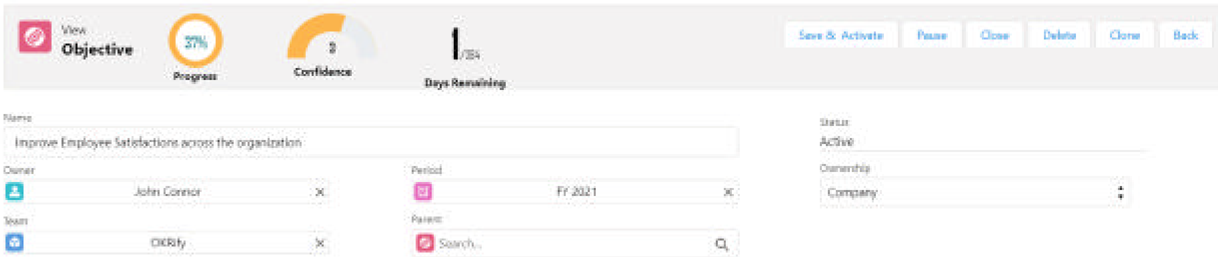


- Click the Pause button and confirm by clicking Yes in the popup confirmation.



- 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.

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

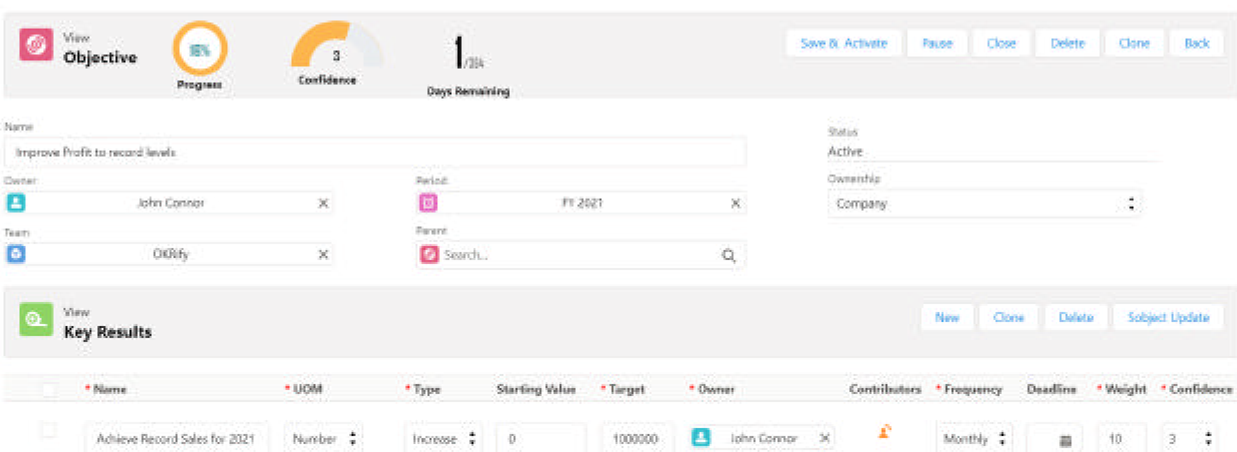


Close OKR

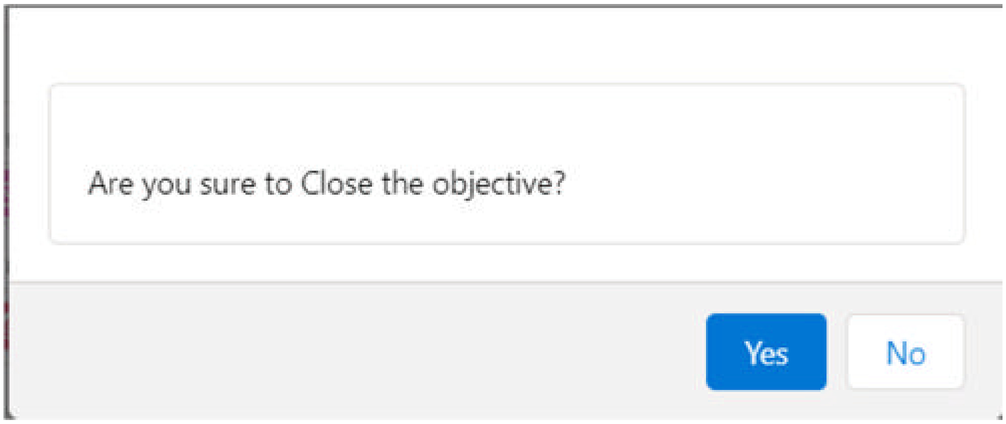
There are times when objectives need to be closed due to change in plans or priorities. OKRify provides the ability to close an objective. Key Result progress cannot be updated for a closed objective.

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.

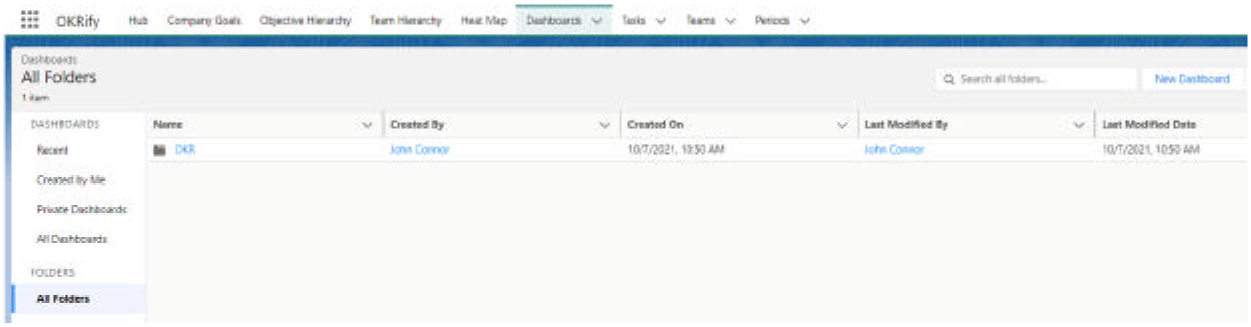
OKRify Dashboards

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

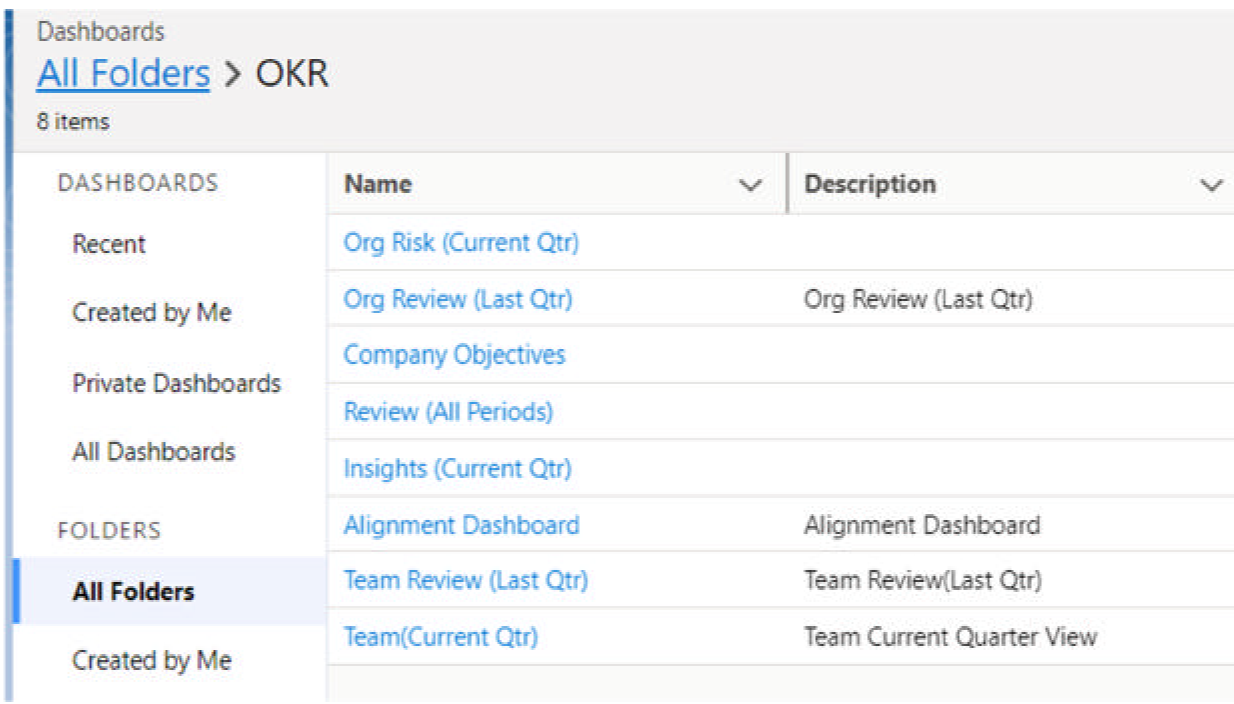
- Org Risk(Current Qtr) – Dashboard for Organization wide OKR risk, confidence, etc for current period.
- Org Review(Last Qtr) – – Dashboard for Organization wide OKR risk, confidence, etc for last period.
- Company Objectives – Dashboard for Company goals for current period.
- Review(All Periods) – 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.

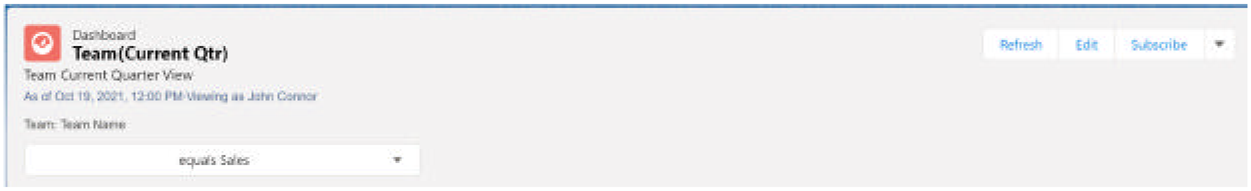


Click on any of the dashboard to see the charts, numbers and reports.

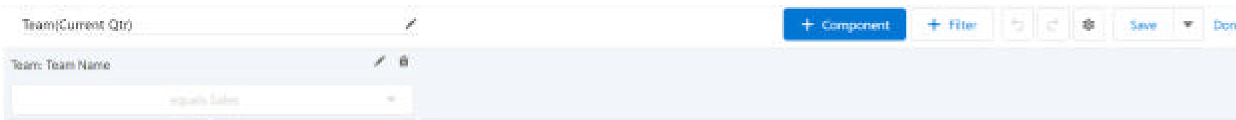


Team Dashboards

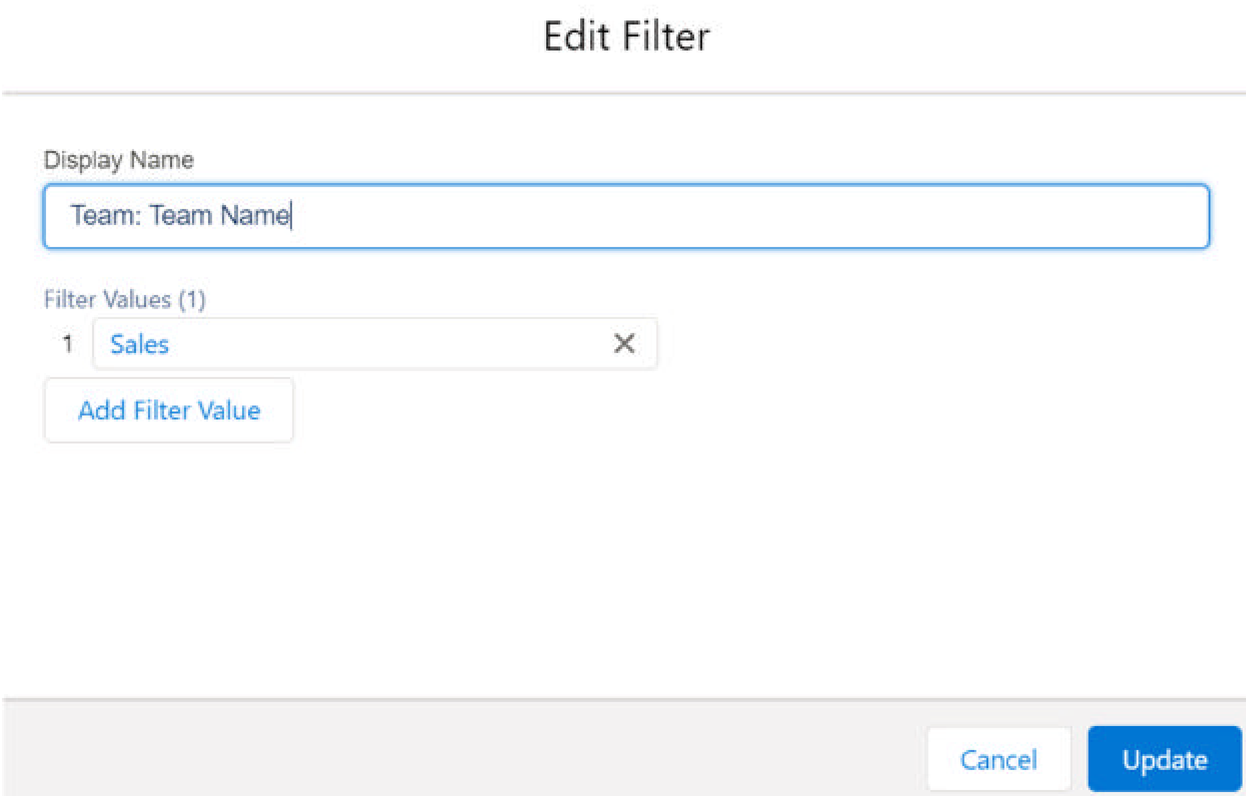
Team dashboards allow users the ability to filter for their specific team. Click Edit on the Dashboard to customize the dashboard.



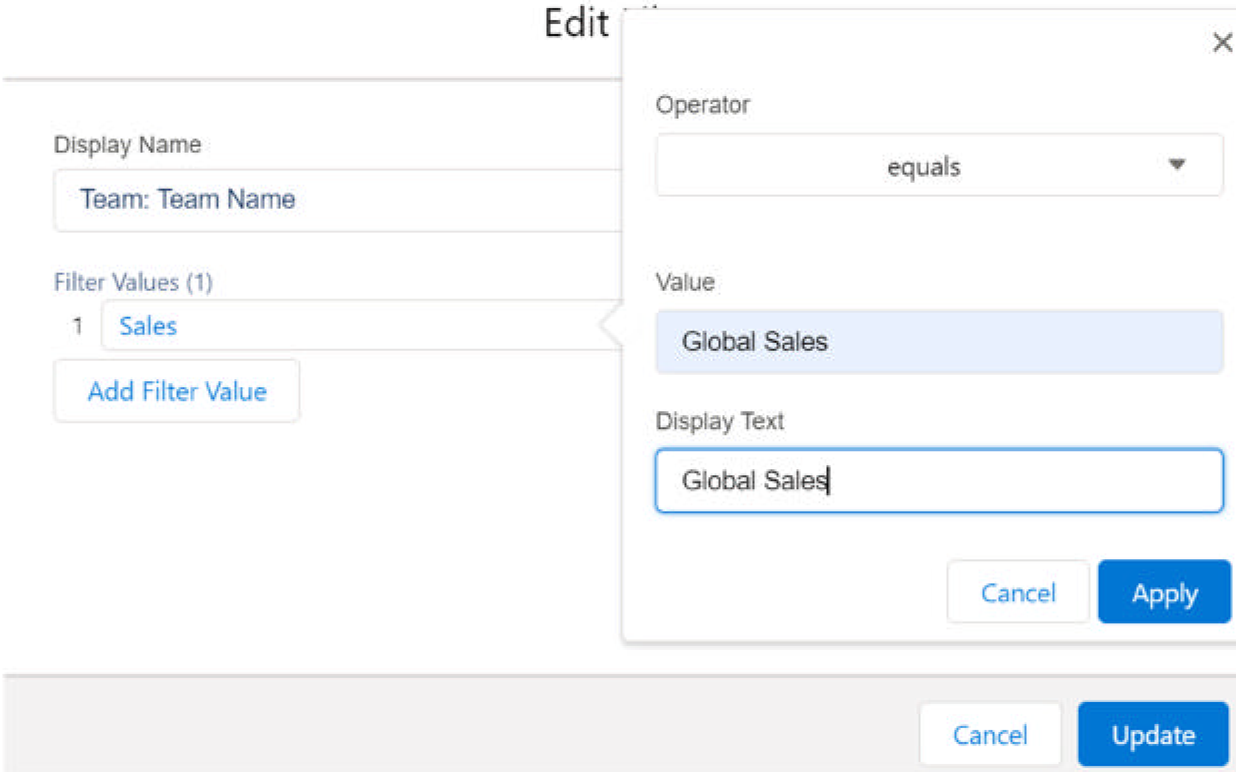
Click the pencil icon for the Team Name to add your team as a filter.



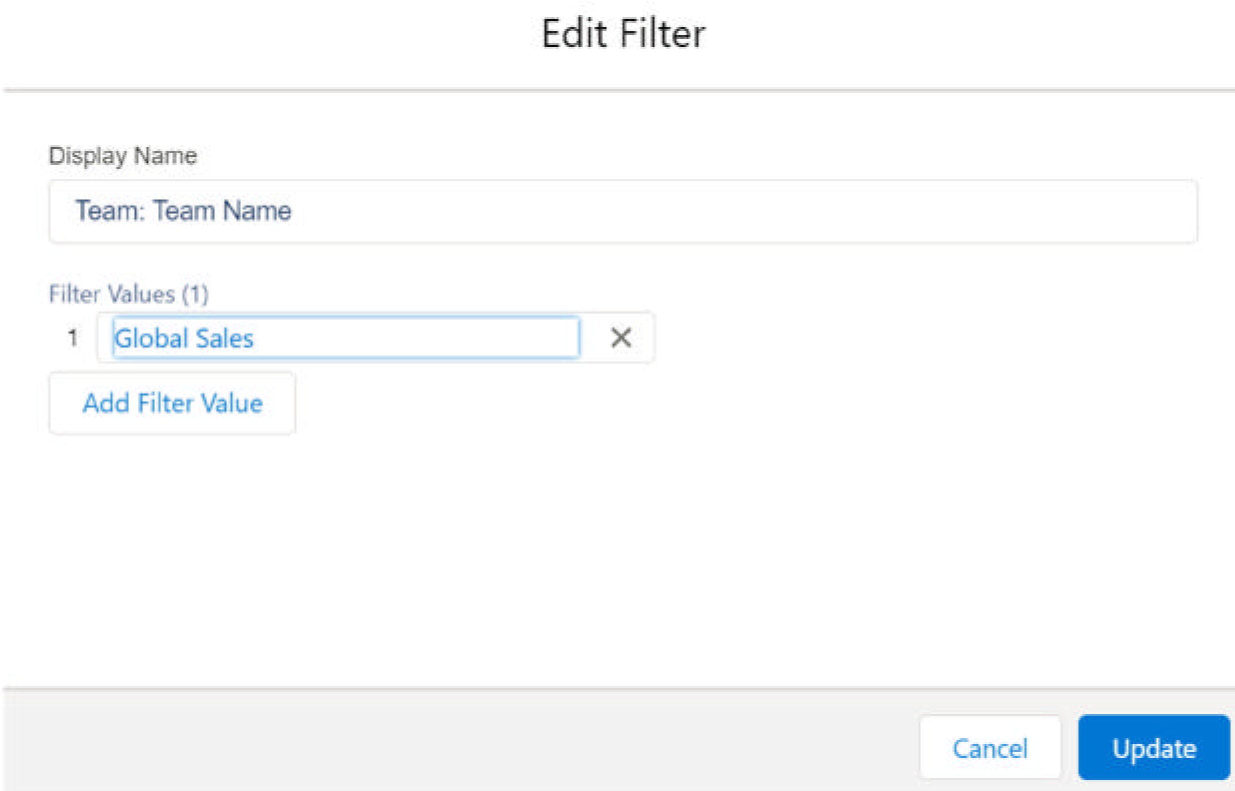
Click Add filter value to add a new filter value



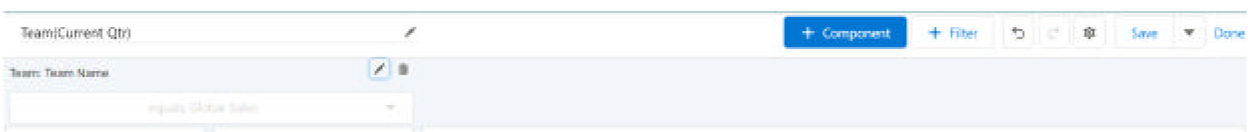
Add the Value and the Display Test of your team name. Enter your team name as it is in OKRify. Click Apply.



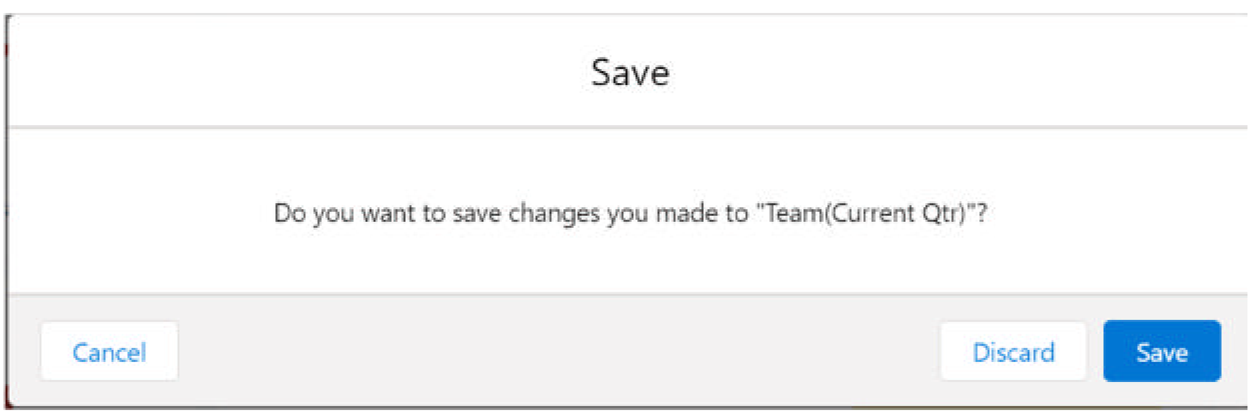
Then click Update in the next window when you see your team name.



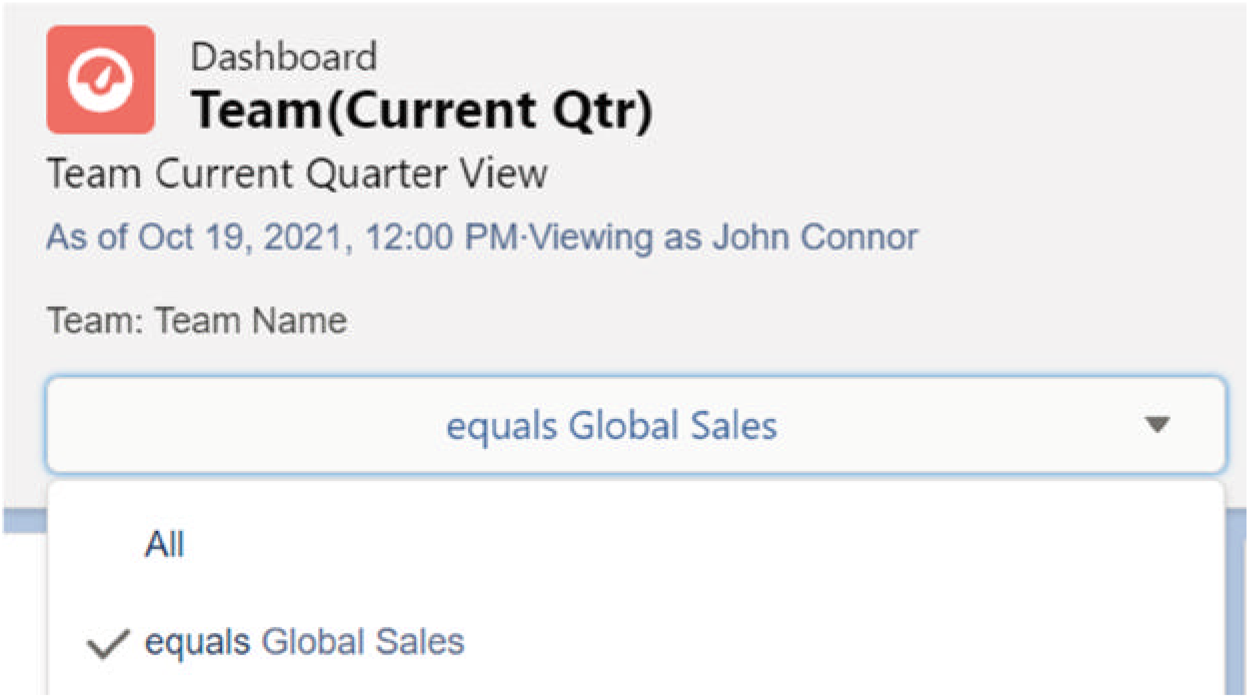
Click Save.

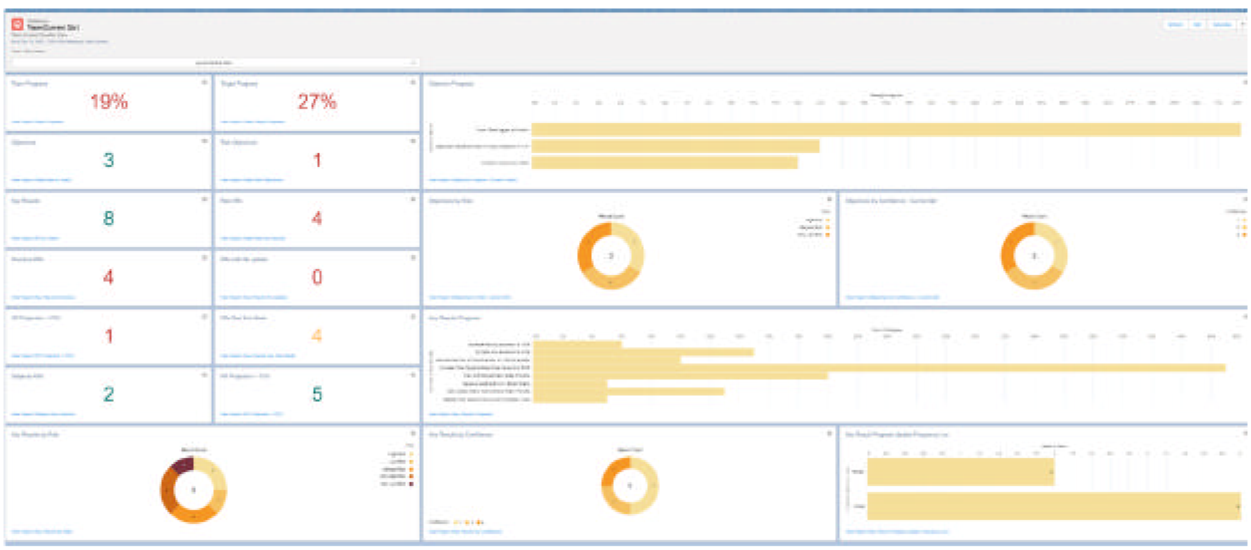


Click Save again in the popup window.



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



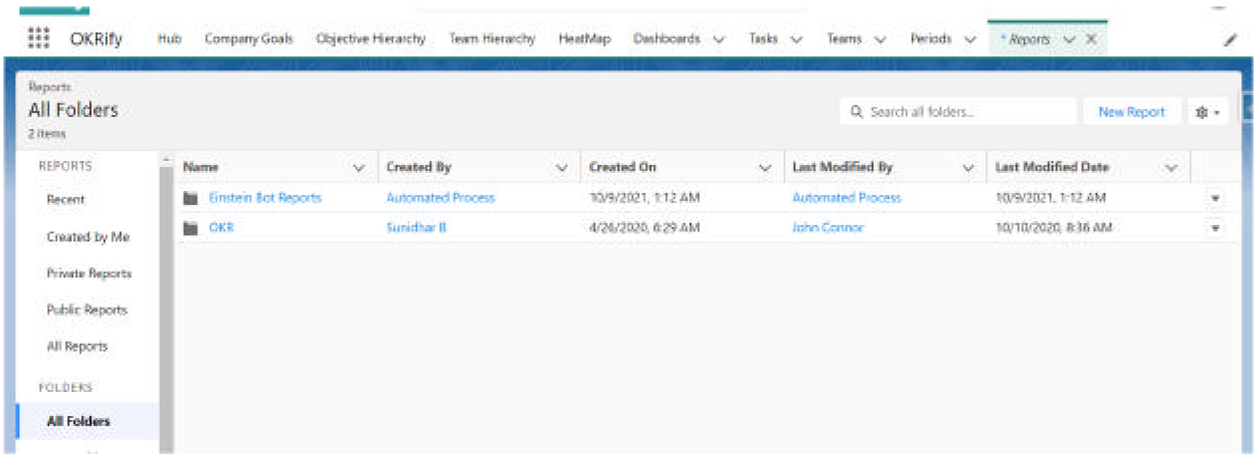


OKRify Reports

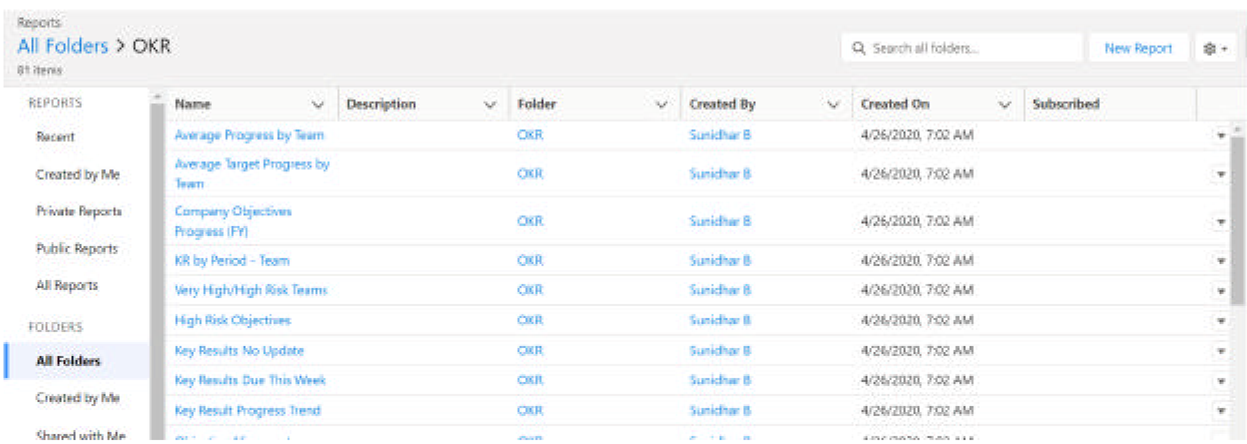
Reports and Dashboard are essential to track OKRs, analysing adoption of OKRs and for making improvements to OKR implementation in your organization. OKRify comes with a standard set of reports to track OKRs at Organization and team levels. We also provide reports to analyse OKR adoption in your organization.

To view OKRify reports,

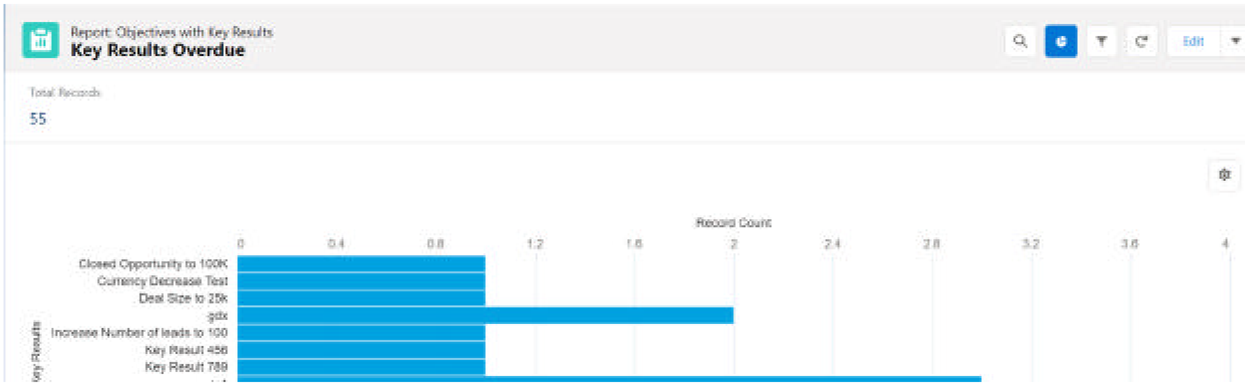
- Go to Reports tab and All Folders to see OKR folder



- 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.

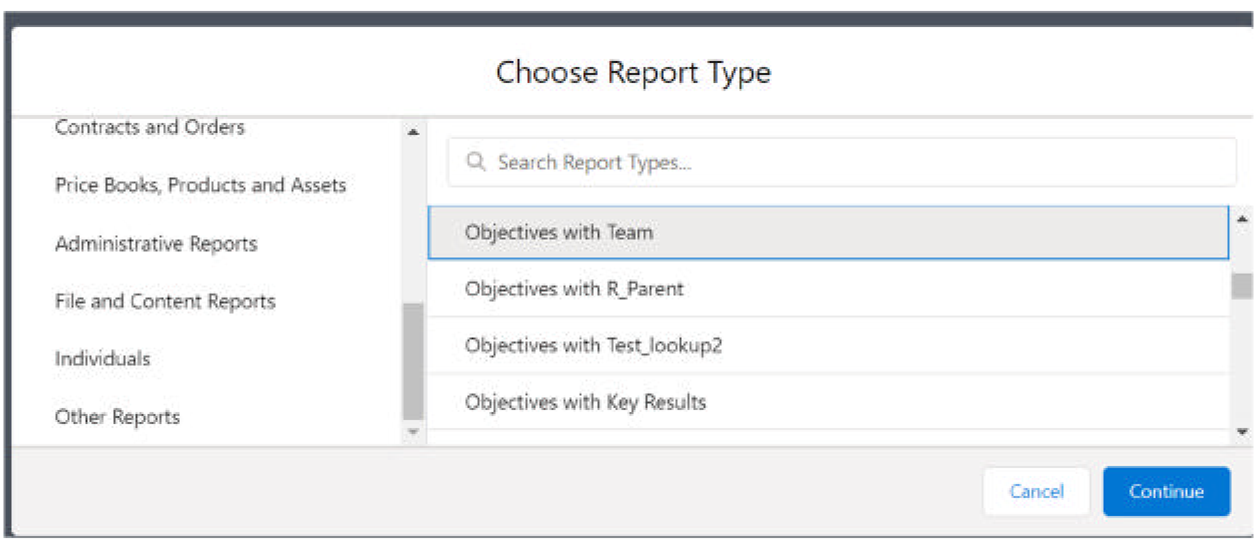


Create New Salesforce Report

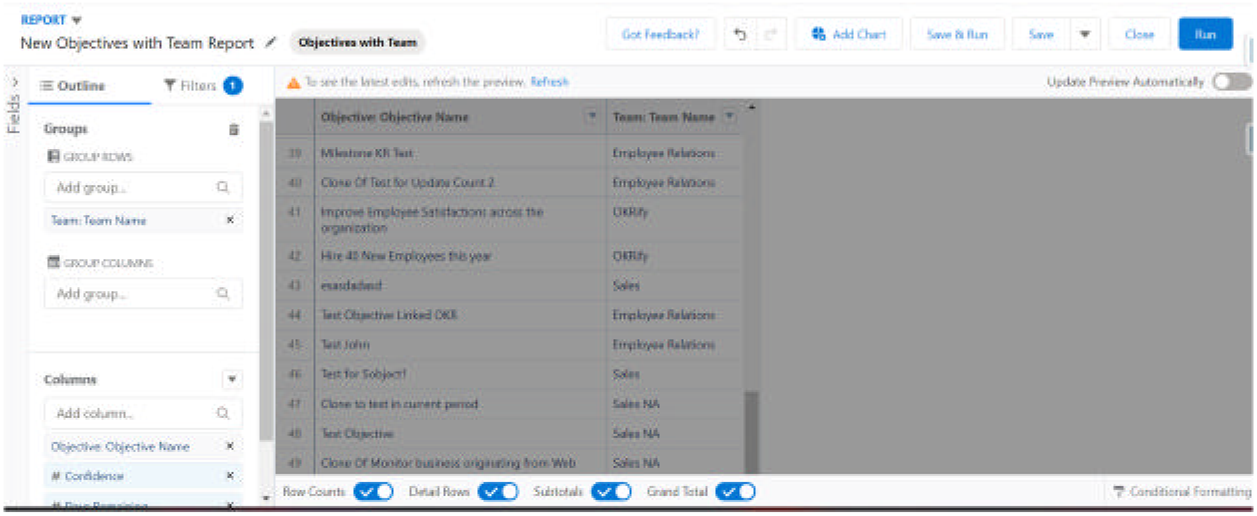
Salesforce platform provides many benefits including the ability for users to create custom reports based on any standard, managed package or custom objects. Salesforce allows users to create Tabular reports, Summary reports, Matrix reports and Joined reports. Any of these reports can be created for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

To create a report

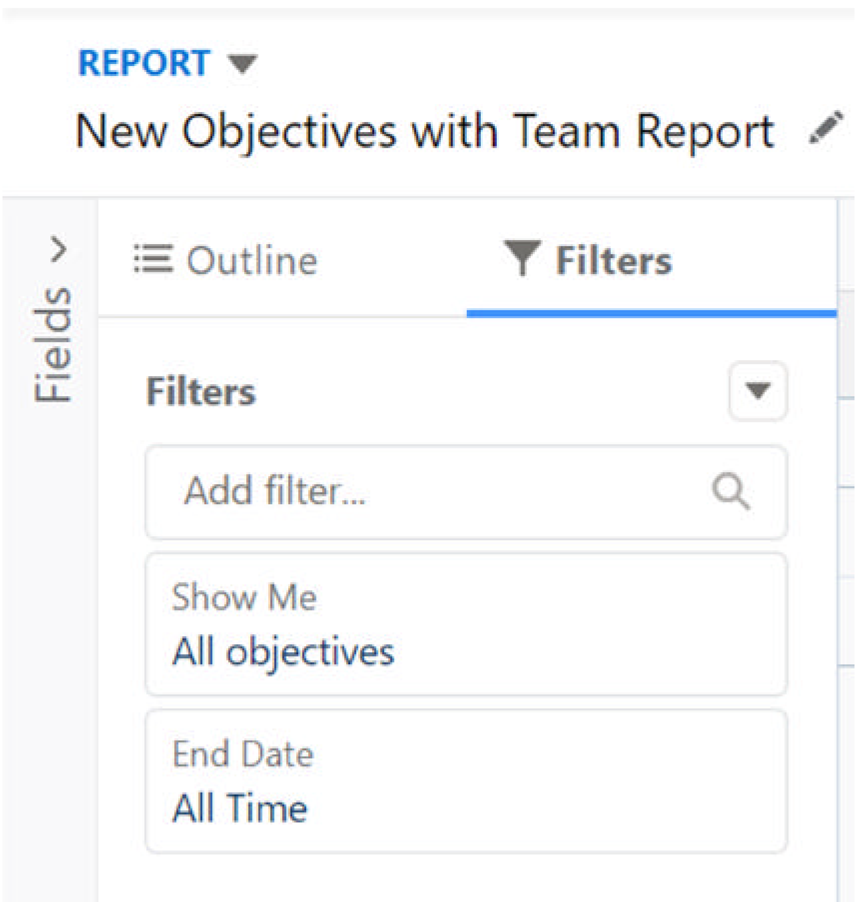
- Go to reports and click New Report
- Select the report type you want to use and click continue



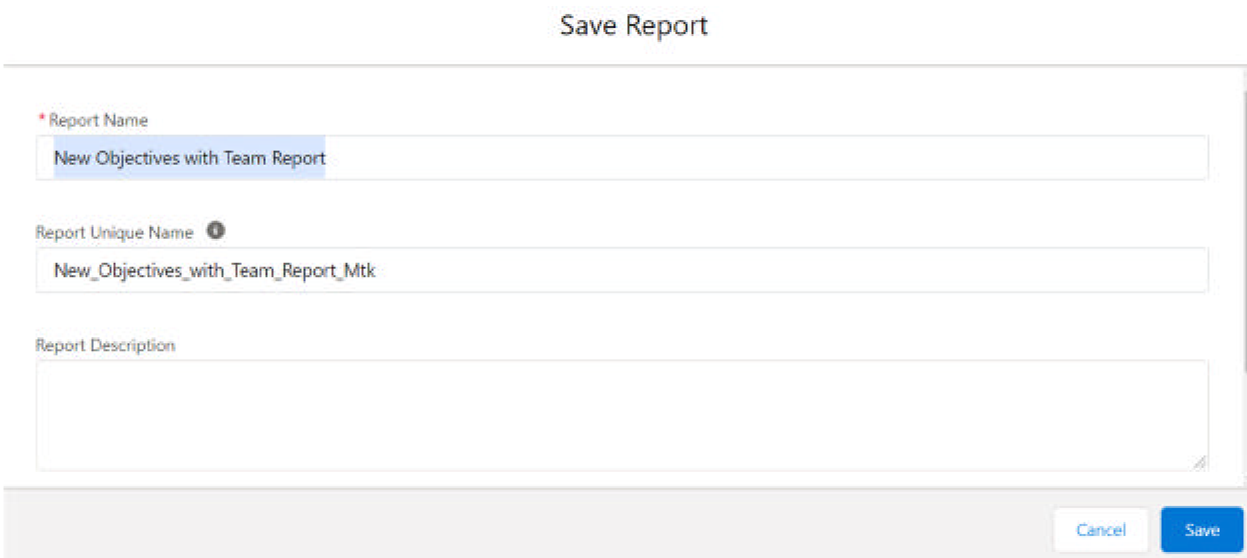
- Select fields for Groups – Row/ Columns and Columns for the report. Click Refresh to see the preview of the data.



- Select the Filters tab and enter filters are required.



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



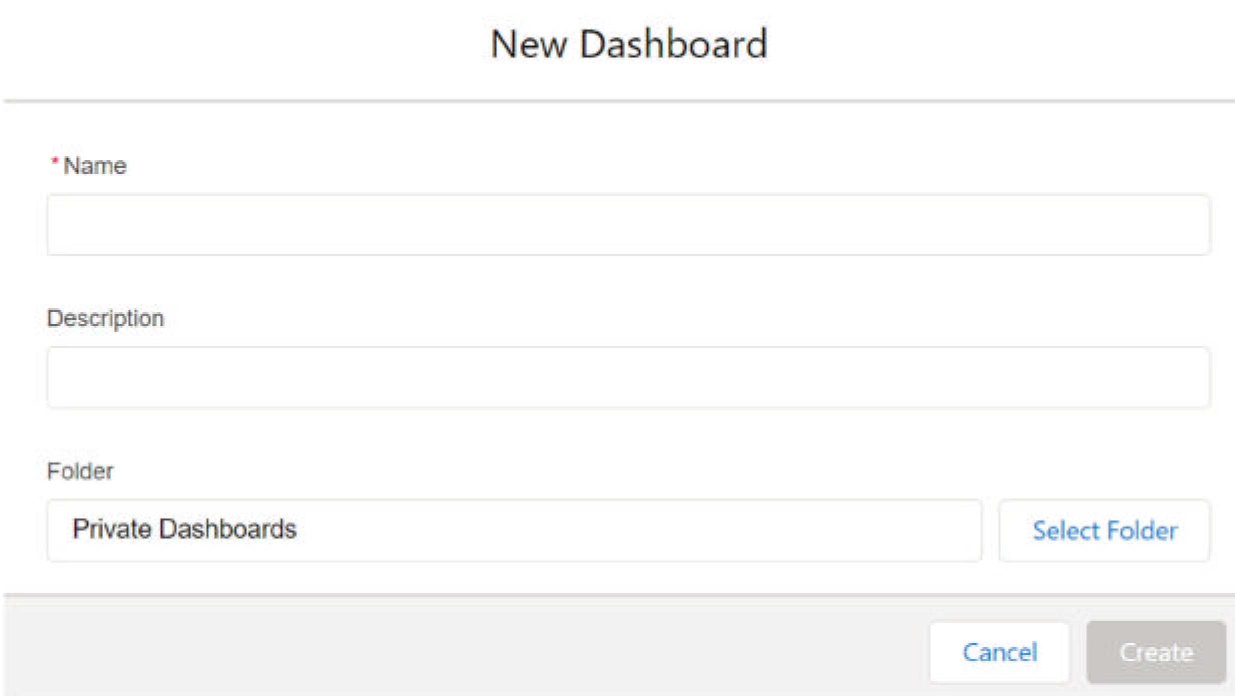
Create new Salesforce Dashboard

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

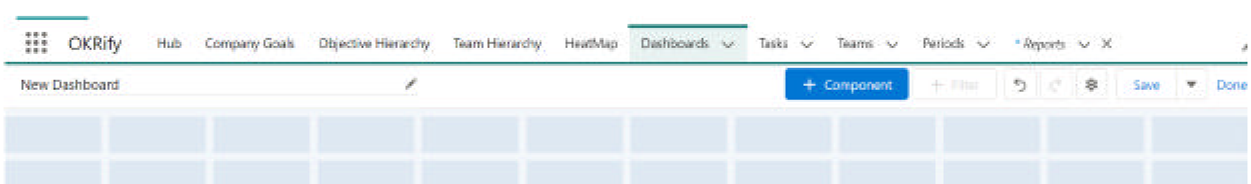
- Org Risk (Current Qtr)
- Team (Current Qtr)
- Insights (Current Qtr)
- Company Objectives
- Team Review (Last Qtr)
- Org Review (Last Qtr)
- Review (All periods)

To create a new Dashboard,

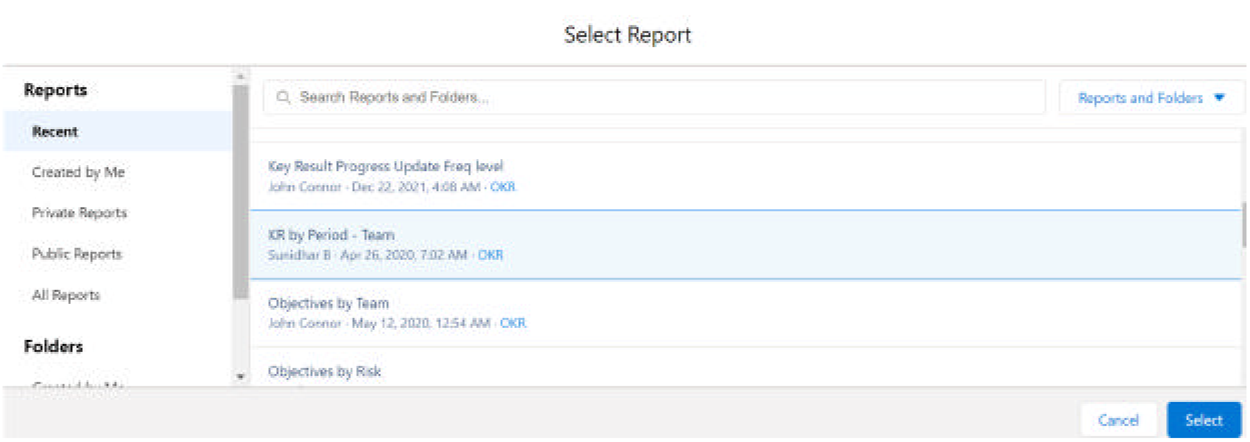
- Go to Dashboard and click New Dashboard.
- Enter Name for Dashboard, Description and select a folder. If a new folder is required create a new folder before saving the dashboard.



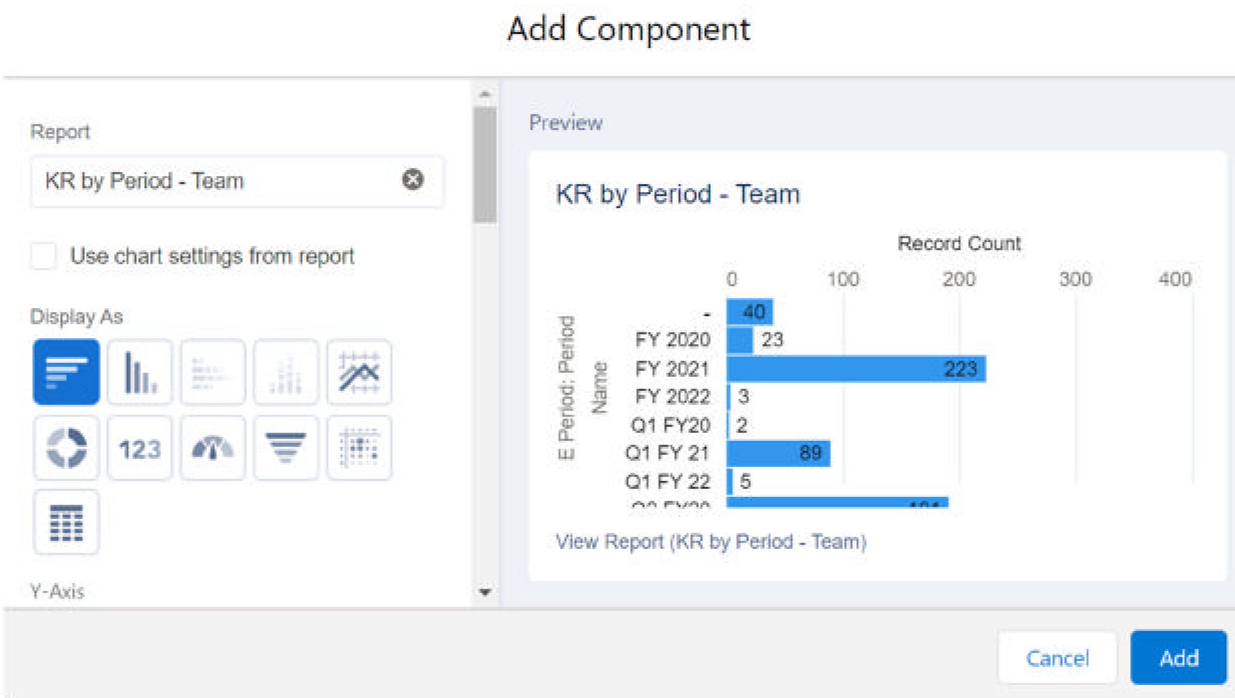
- Click Component to add a new component to the Salesforce Dashboard



- 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 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.

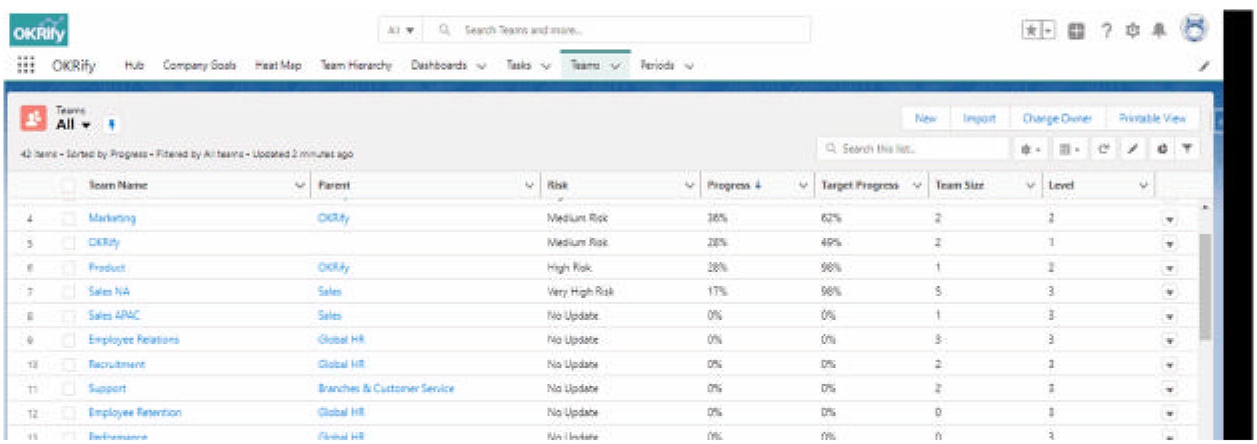
Setting up your team and onboarding users is one of the first steps in getting started with OKRify. We understand setting up teams and team members can be a time consuming process. We value our customer's time and to enable quick onboarding our support team can help with setting up teams and team members 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.



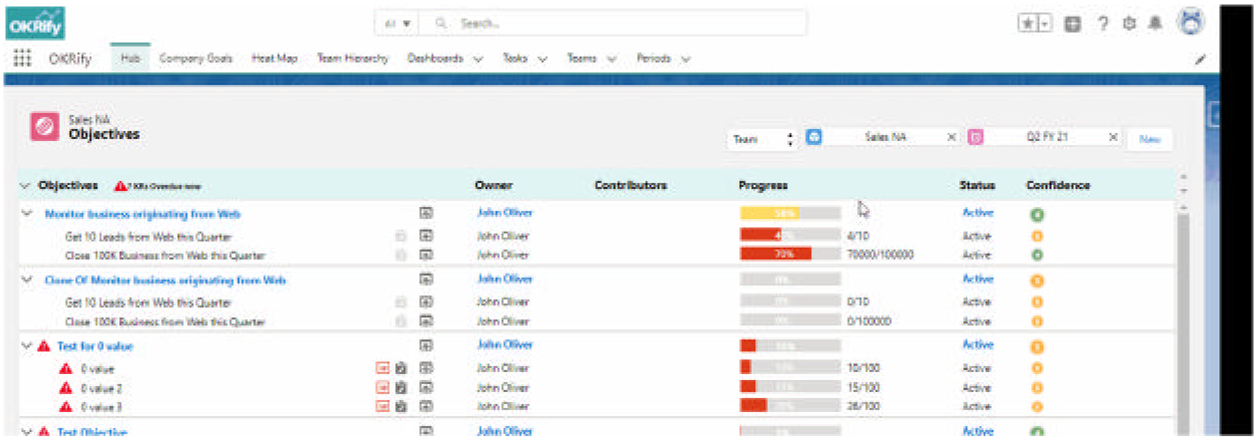
In the popup that follows

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.



You can click on the Team Name to view

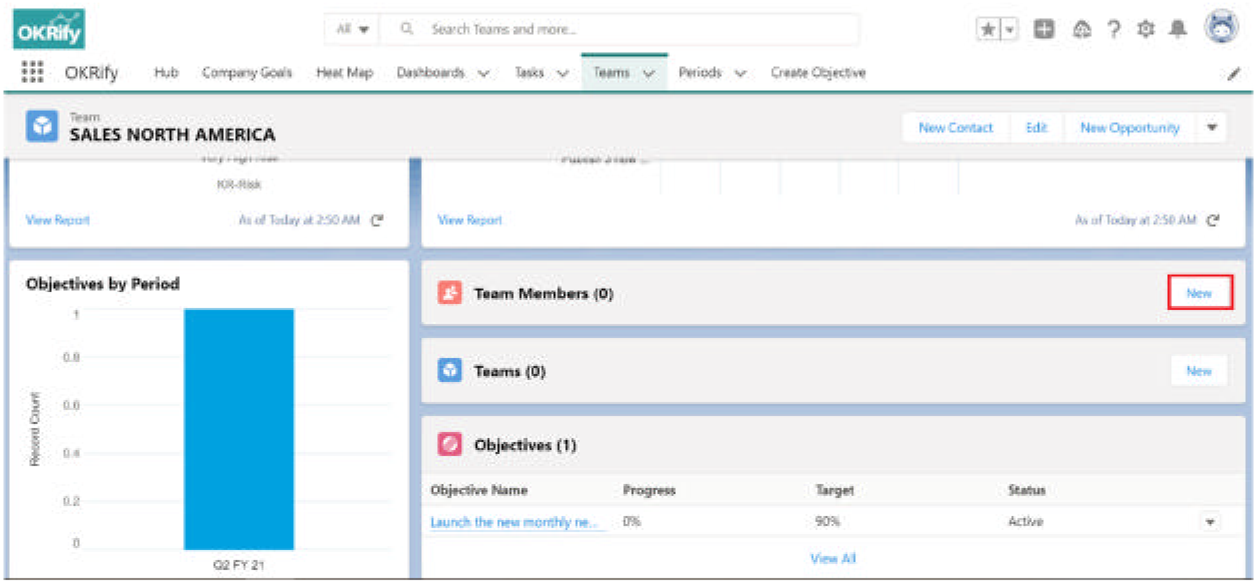
- Team Header (Risk, Team Size, Progress and Target Progress)
- Team Information (Team Name, Parent and Active Status)
- Team Members
- Teams (Child Teams)
- Objectives
- Dashboard for team
    - Objectives by Risks
    - Objective Progress
    - KR by Risk
    - KR Progress
    - Objectives by Period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

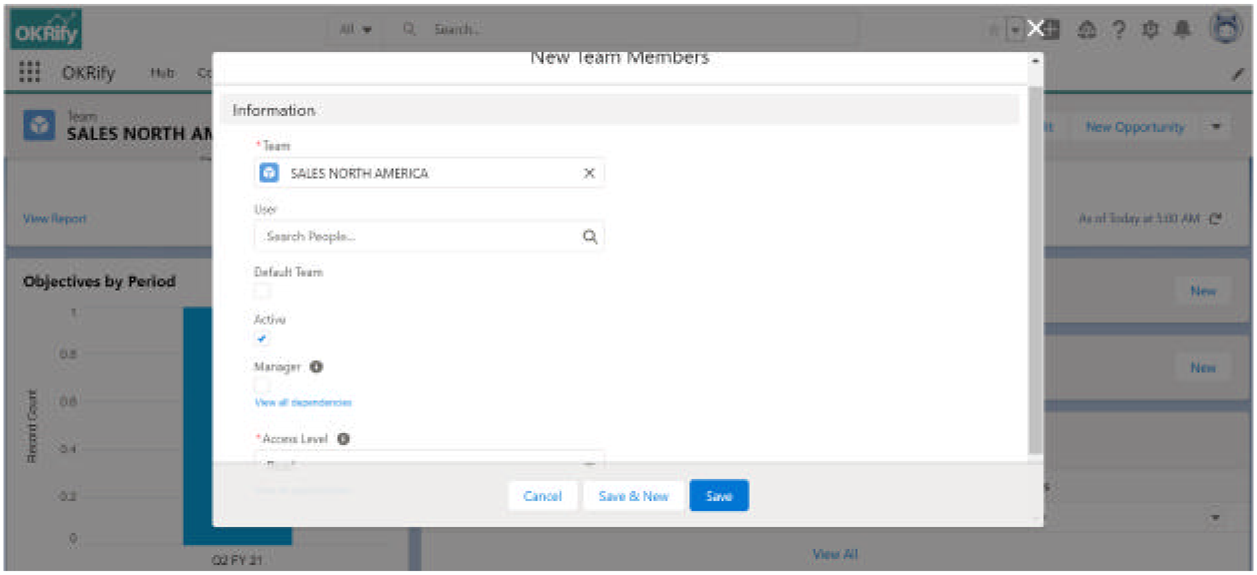
Add/Manage Team Members

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.



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

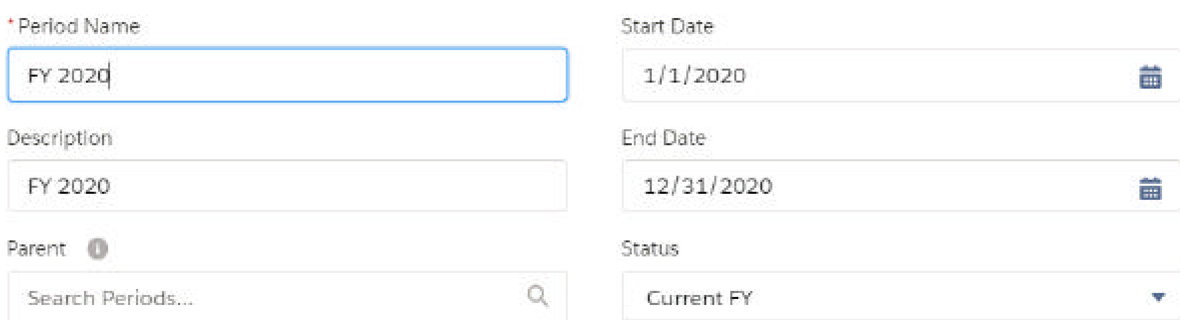
- Create Period
- Search Period
- Edit Period (Change Period Status to Current or Close)

Create Period

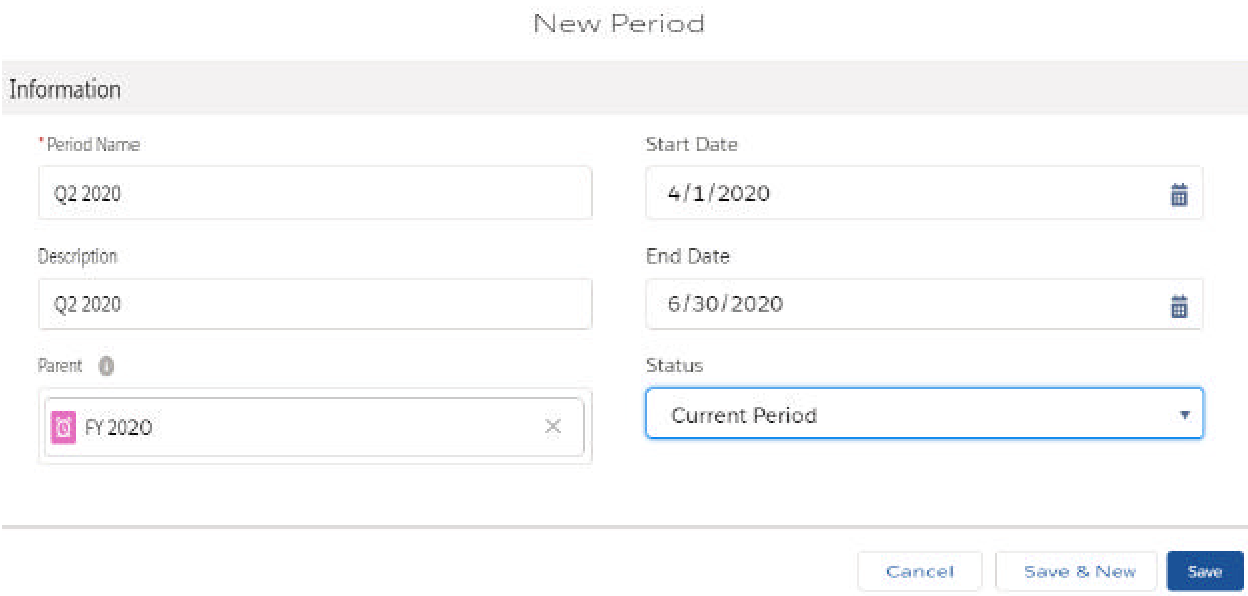
Periods can be created in the Periods tab by OKR Administrator (OKR Admin Permission Set is required). Click New to create a new period. Enter the following fields and save the period:

- 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



Sample Current Period



Search and view Period

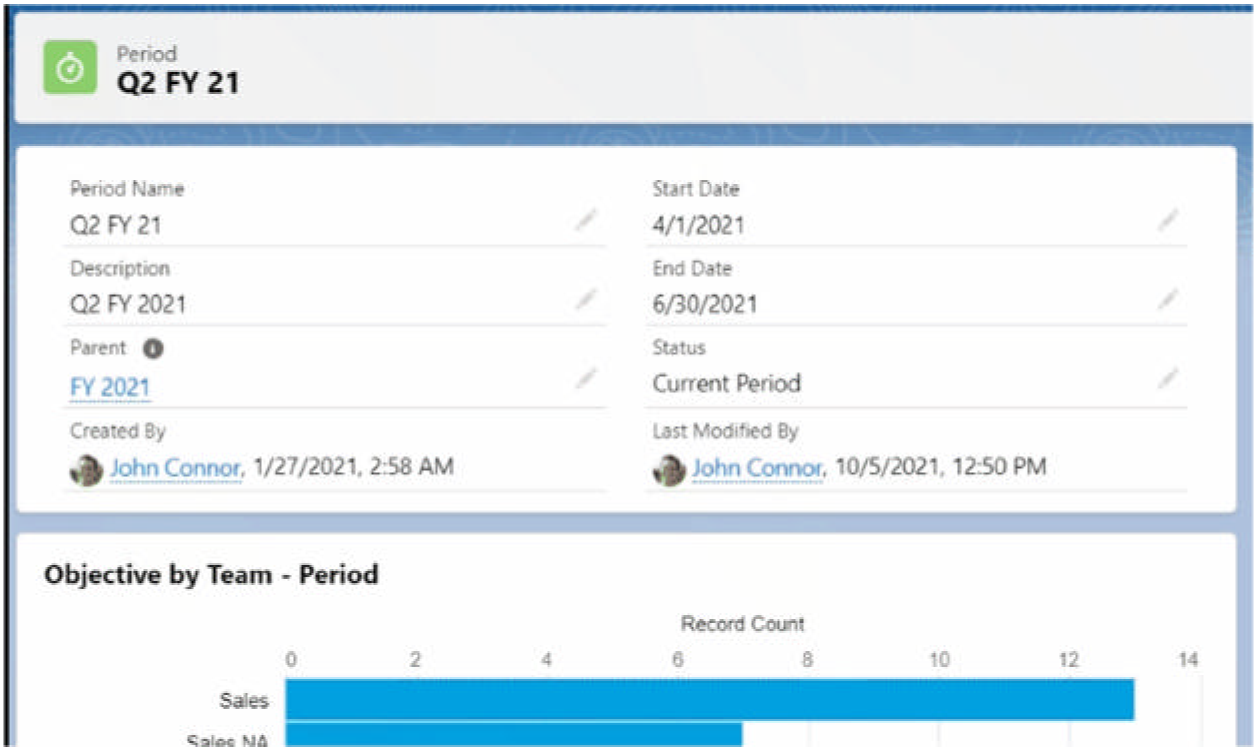
Click on the Periods tab to view the periods that have already been created. By default, the recently viewed periods will only be displayed. You can click on the downward arrow near the Recently viewed tab and select All to view all the periods that are available. You can search a period by typing the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

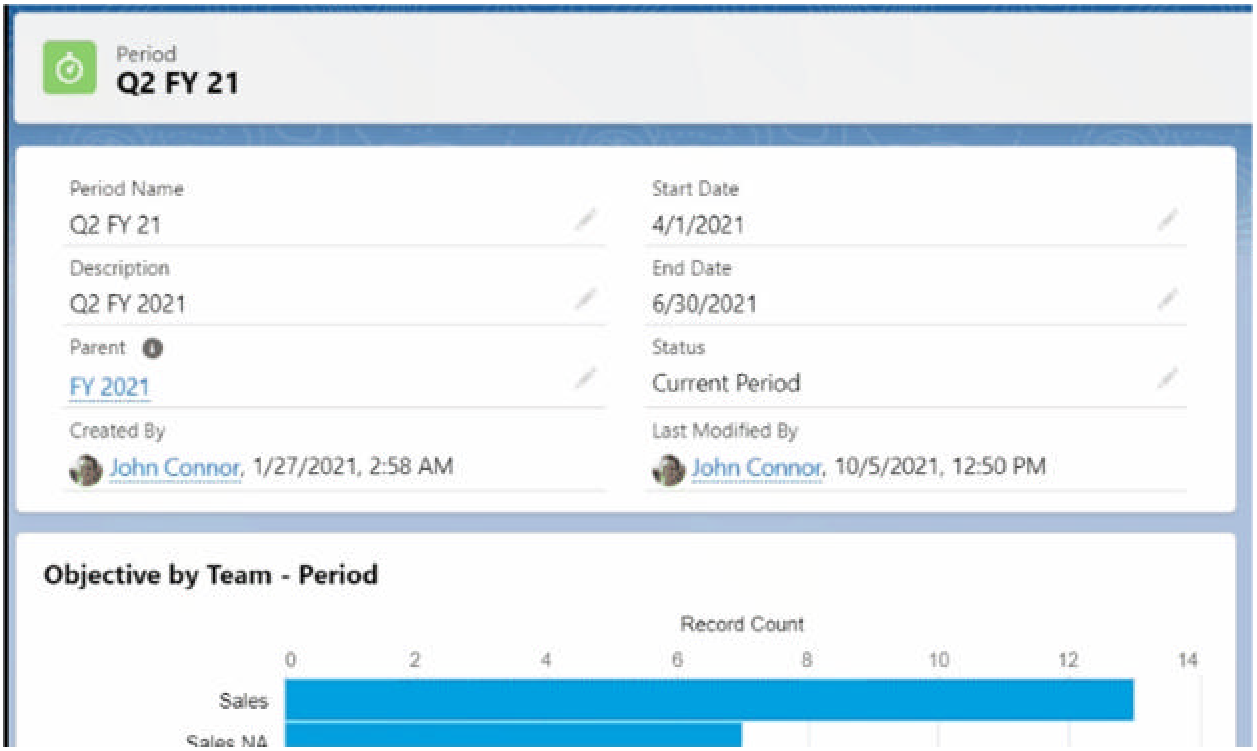
- Objective by Risk
- Objective by State
- Period (Child Periods)
- Objectives (List of Objectives created for the Period)



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.



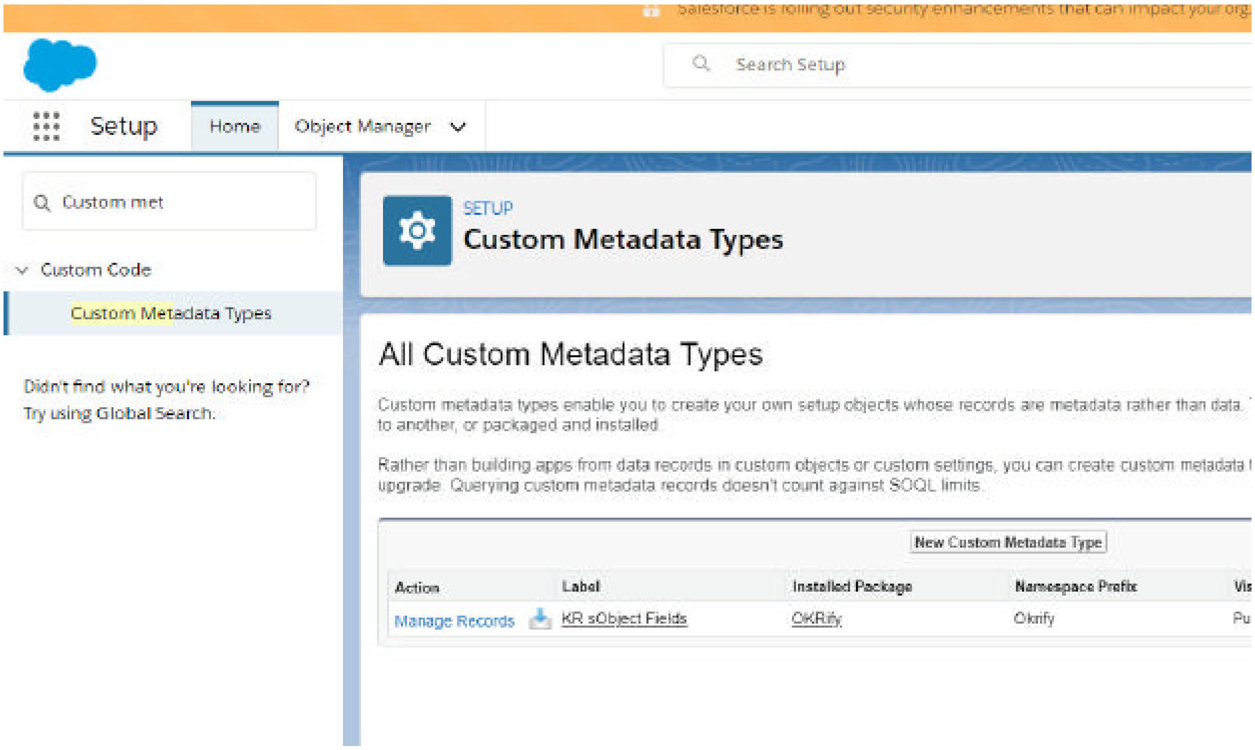
Setup Objects for Sobject Key Results

Sobject 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 Sobject Key Results. Sobject 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.

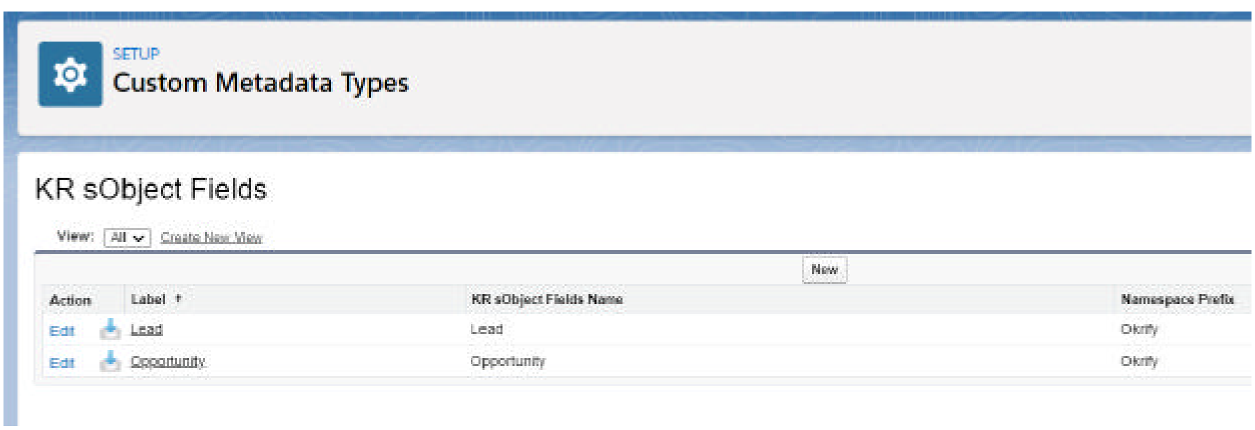
Please click here to check how an Sobject Key Result can be created.

Any Salesforce object can be added for Sobject 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 KRs Object Fields in the custom metadata types to enter the details for the object.



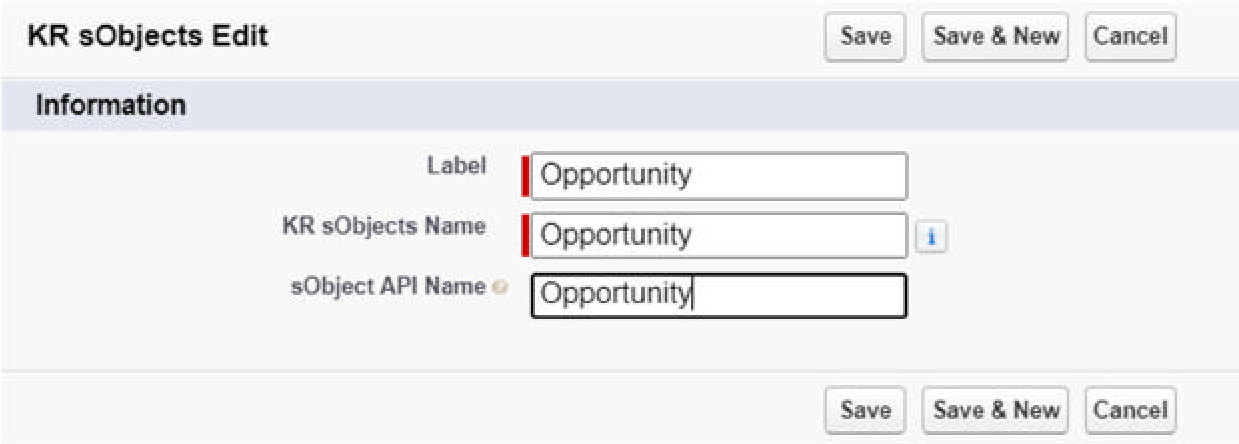
Click the New button to enter a new Object.



Enter the following fields for the object and save.

- **Label**
- **KRs Objects Name**

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



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

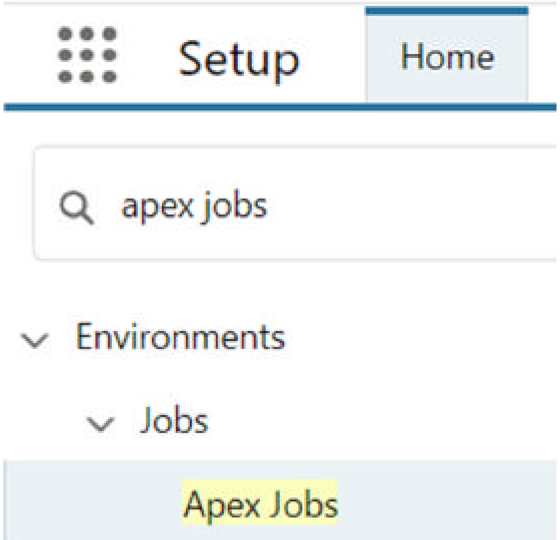
Set up Background Programs

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

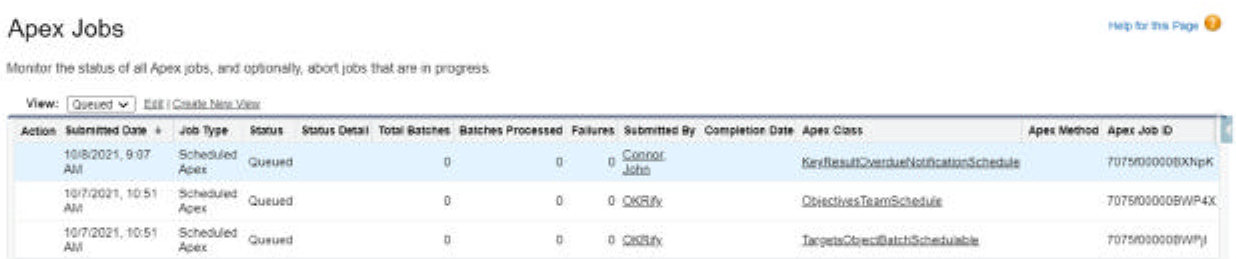
- **Weekly Consolidated Email Notification – KeyResultOverdueNotificationSchedule**
- **Sobject Key Result Update – TargetsObjectBatchSchedulable**
- **Objective Team Progress Update – TargetsObjectBatchSchedulable**

Verify Apex Jobs

Sobject 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



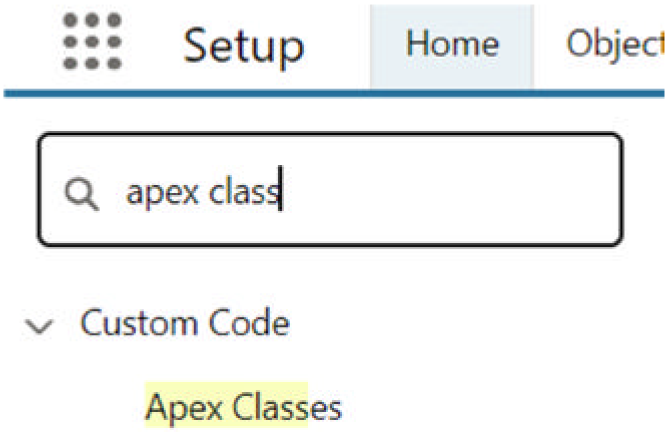
Click Apex Jobs to see all the queued and completed jobs. We recommend creating a separate view for queued jobs to view the list of jobs scheduled.



Sobject 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.

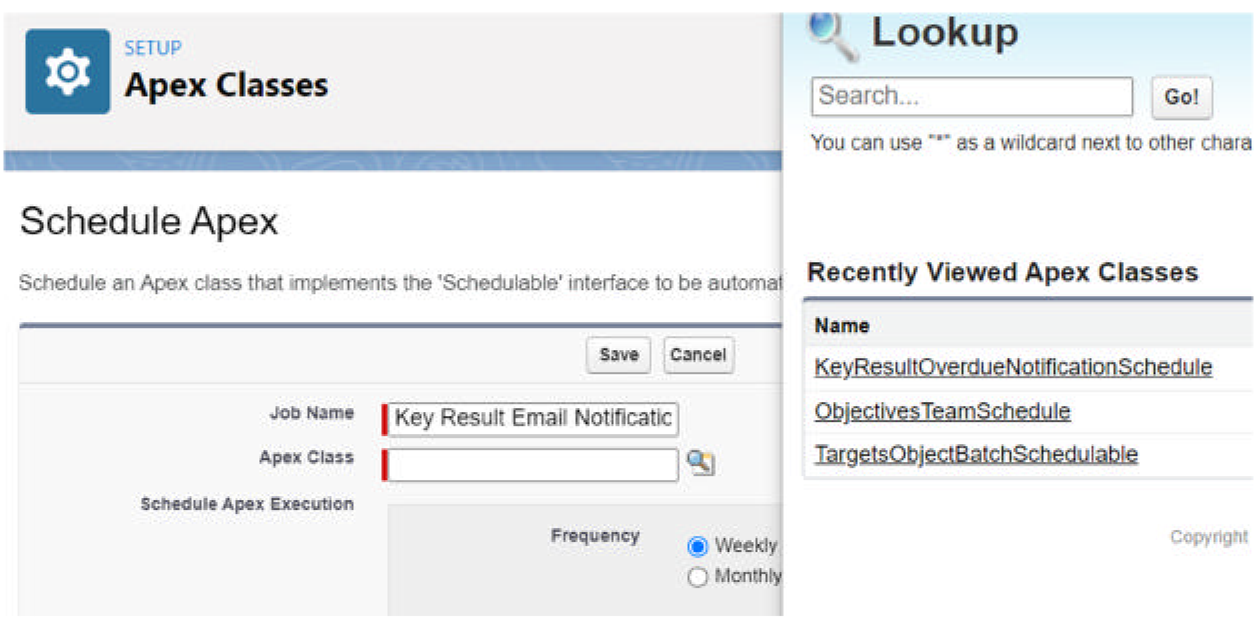
Setting a new Apex Job

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

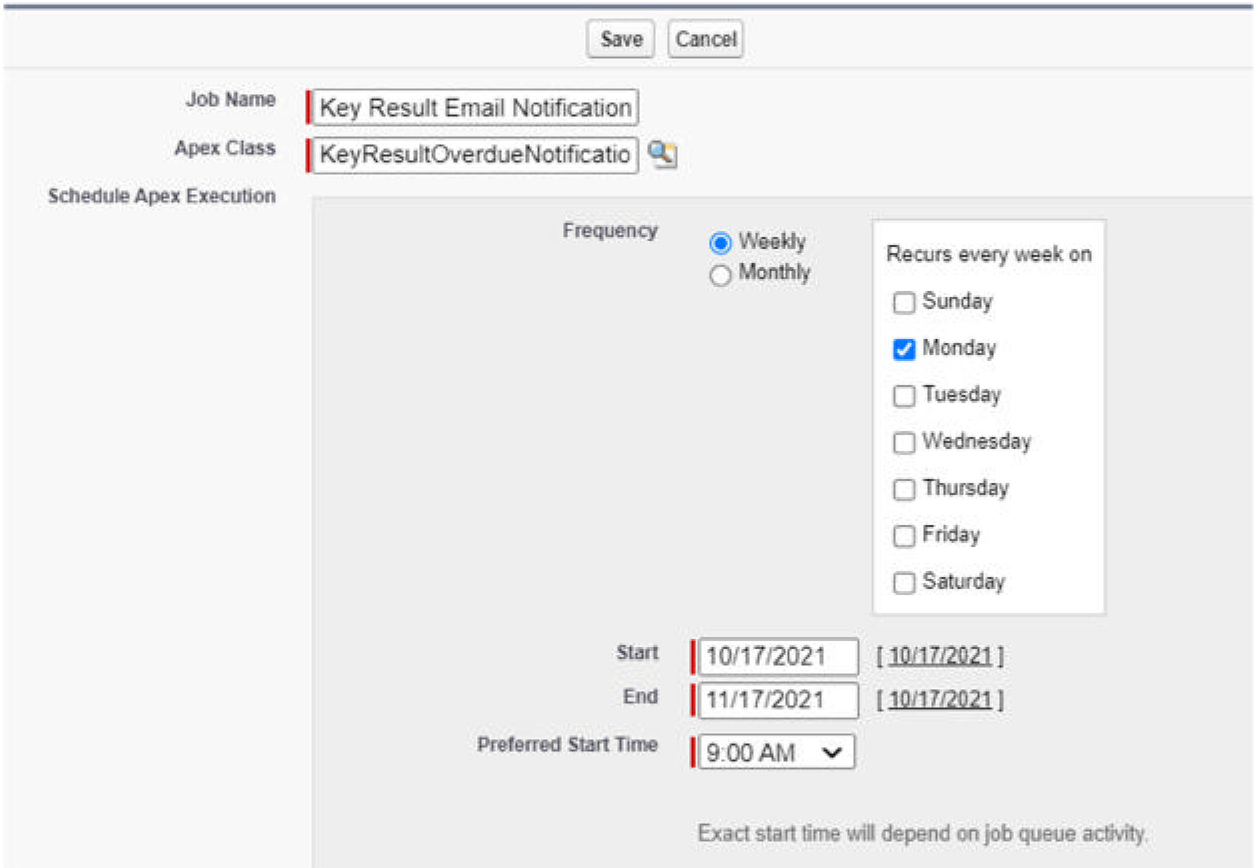


Click Schedule Apex to schedule a new Apex Job.

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



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.

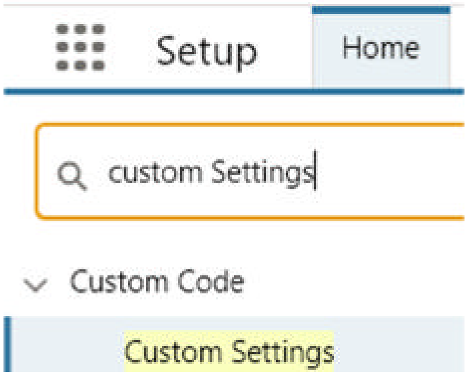


Set up default period for company goals – Custom Settings

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

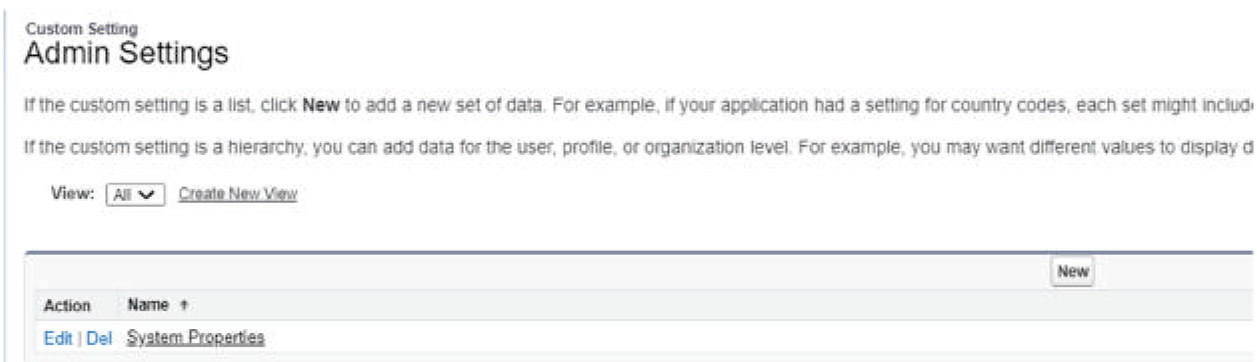
- Default period for Company Goals – Current FY or Current Period
- Activate Consolidated Email Notification
- Configure Sender Name for Consolidated Email Notification
- Activate contributors in Hub
- Enabled Key Result Update Date Editing
- Key Result Update Score Tolerance
- Show Prediction in Key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

To change Custom Settings go to setup -> Custom Settings



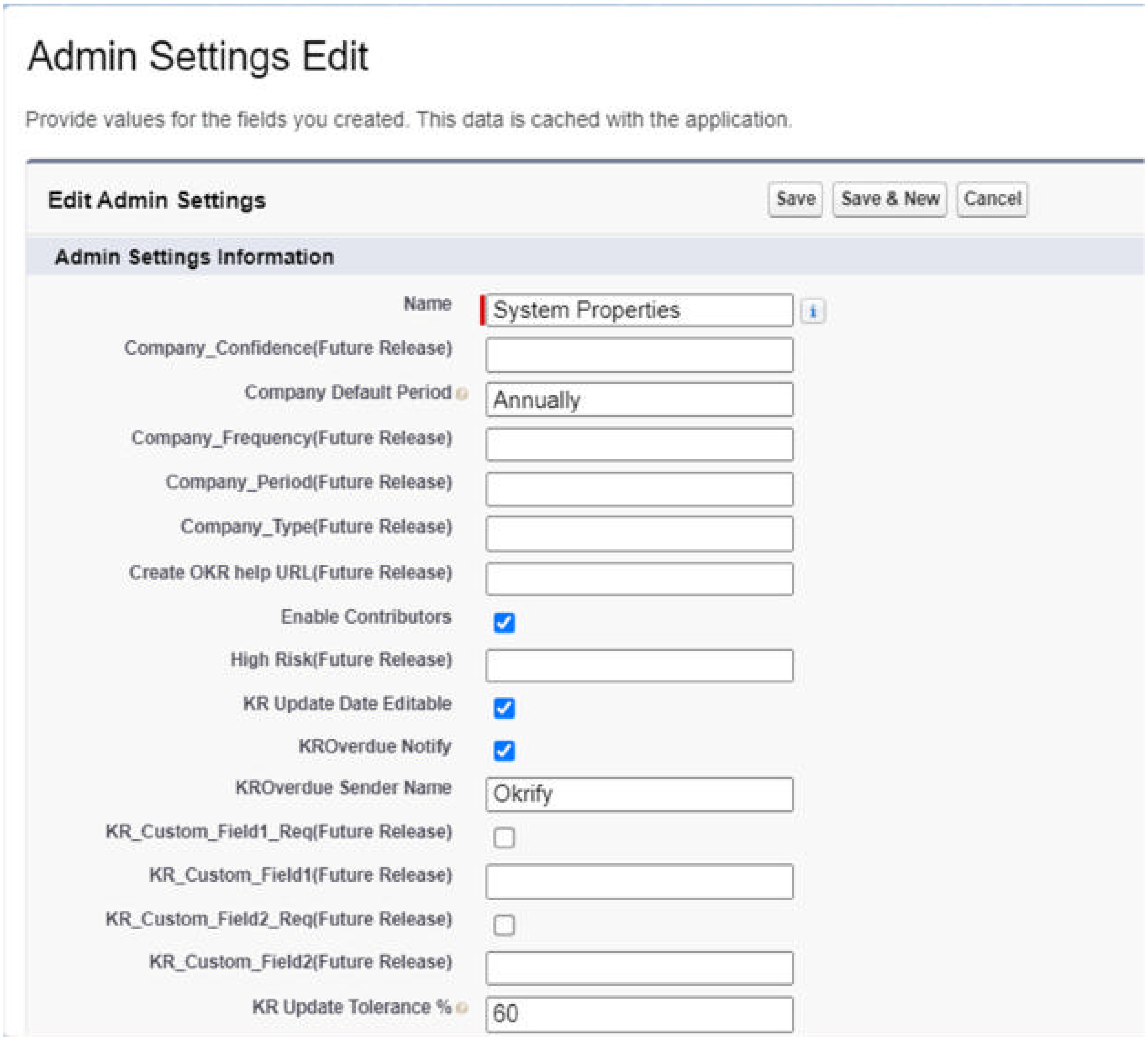
Click Manage for Admin Settings

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.



Default Period for Company Goals

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

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

Activate Consolidated Email notification

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

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

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

Key Result Update Score 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.

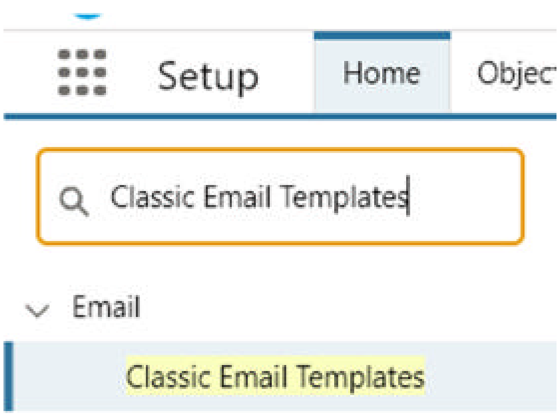
Update Email Template – Key Result Overdue Notifications

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.

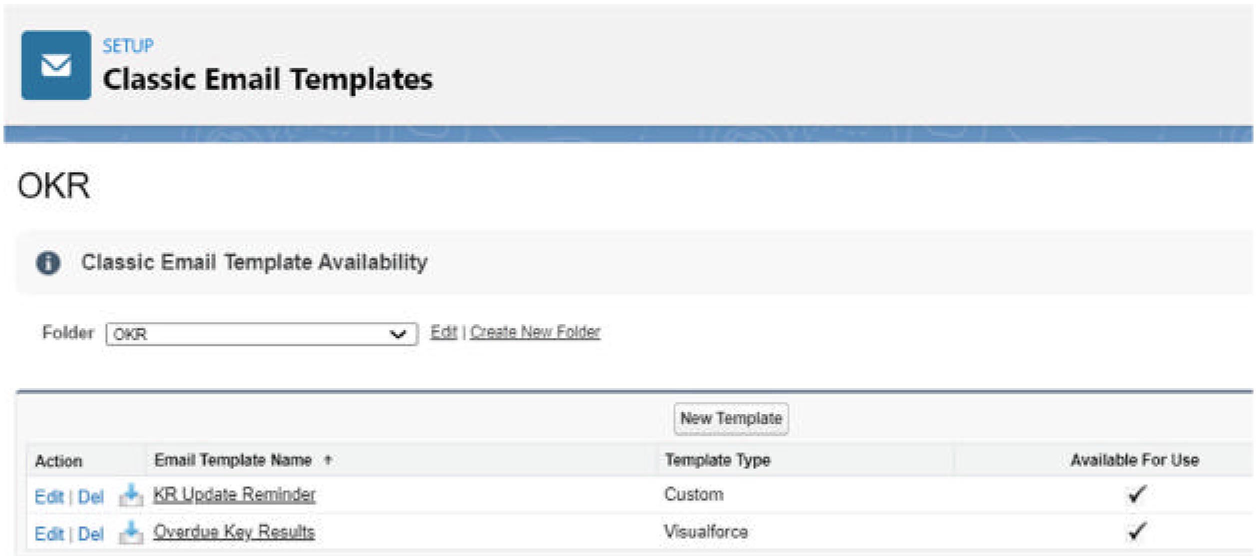
Individual Email Notification

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.

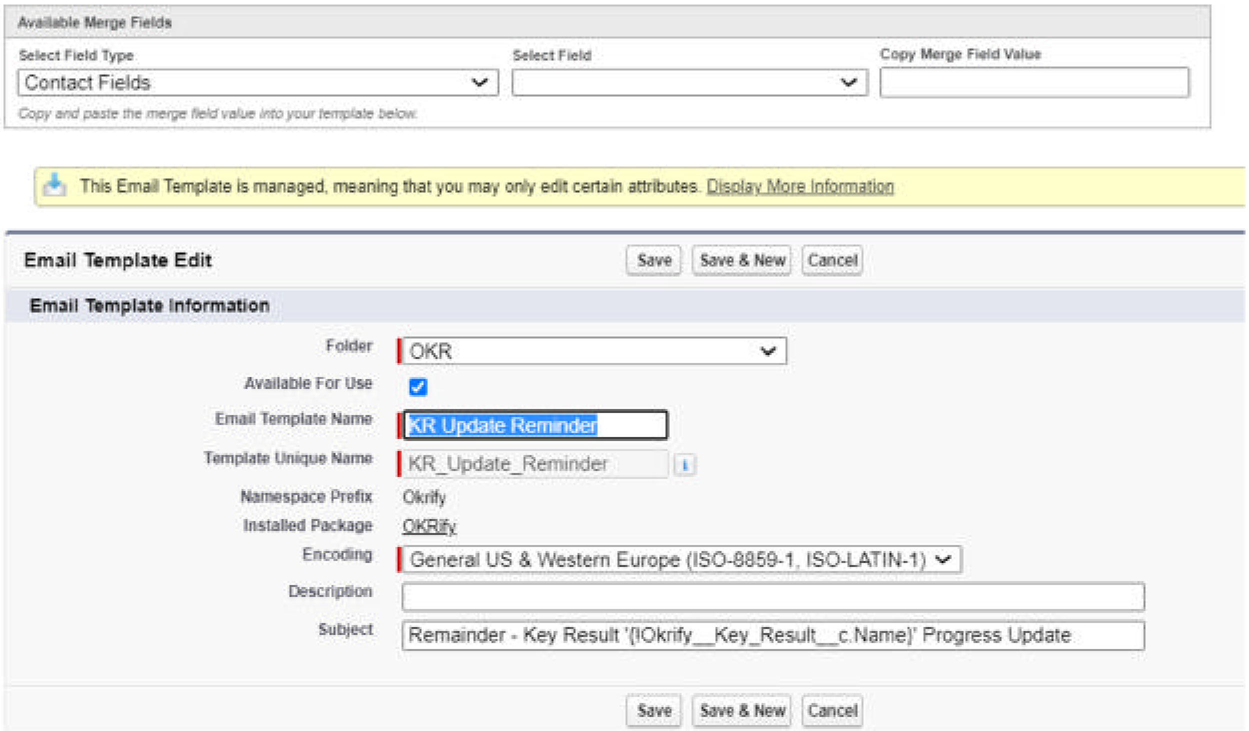
Go to Setup -> Classic Email Templates



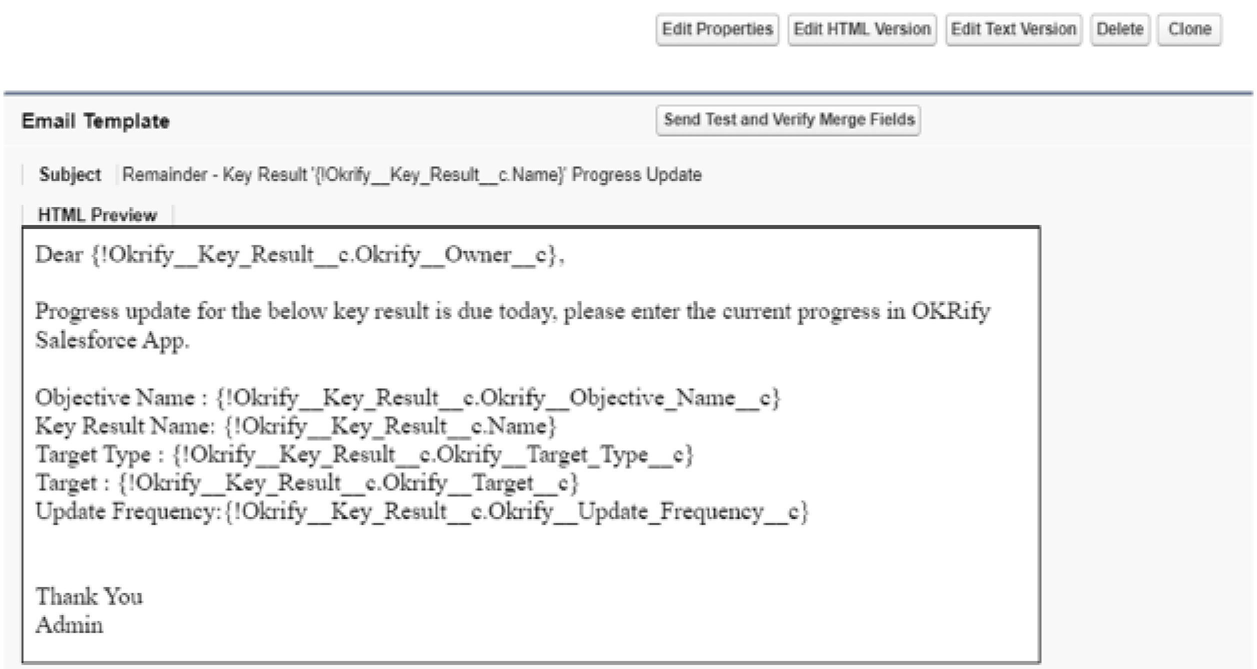
Select the OKR folder to see both the email templates. KR Update Reminder is the template for individual email notifications. Click Edit to edit the subject of the Email notification.



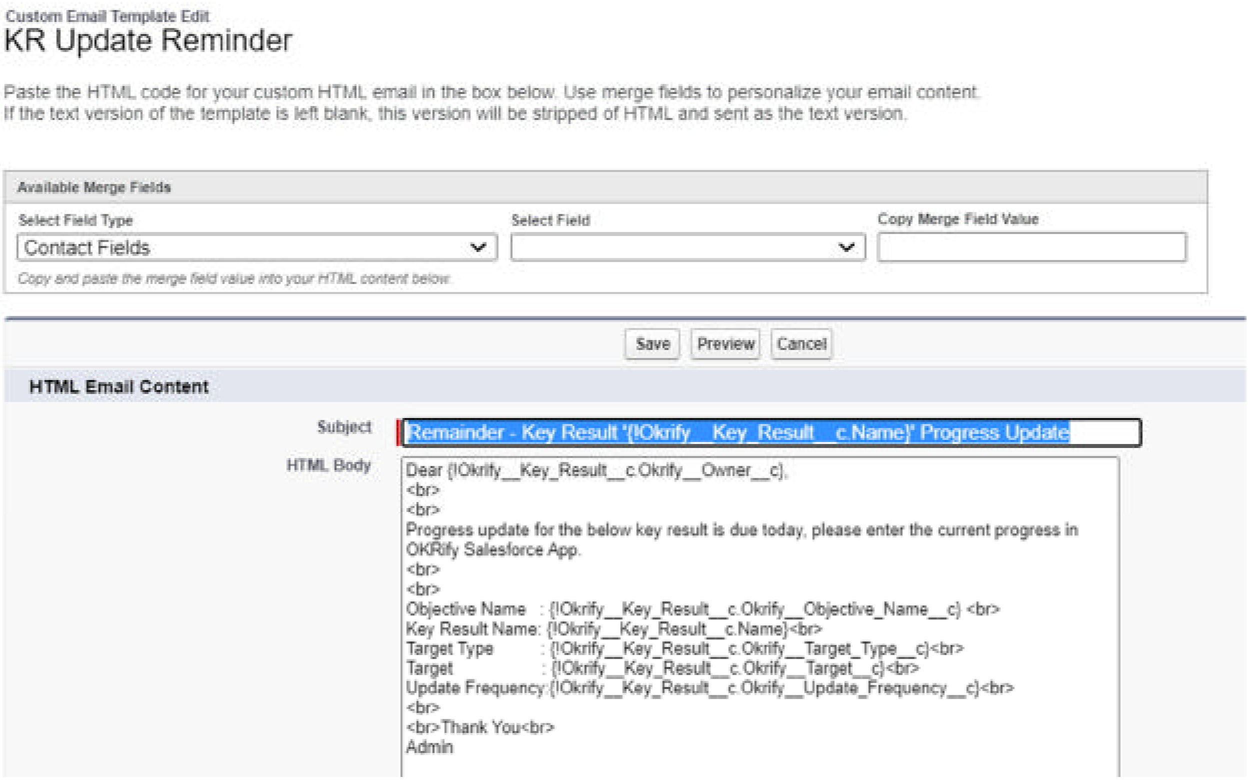
Email notification's subject can be edited and merge fields can also be added as required for your organization.



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



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.

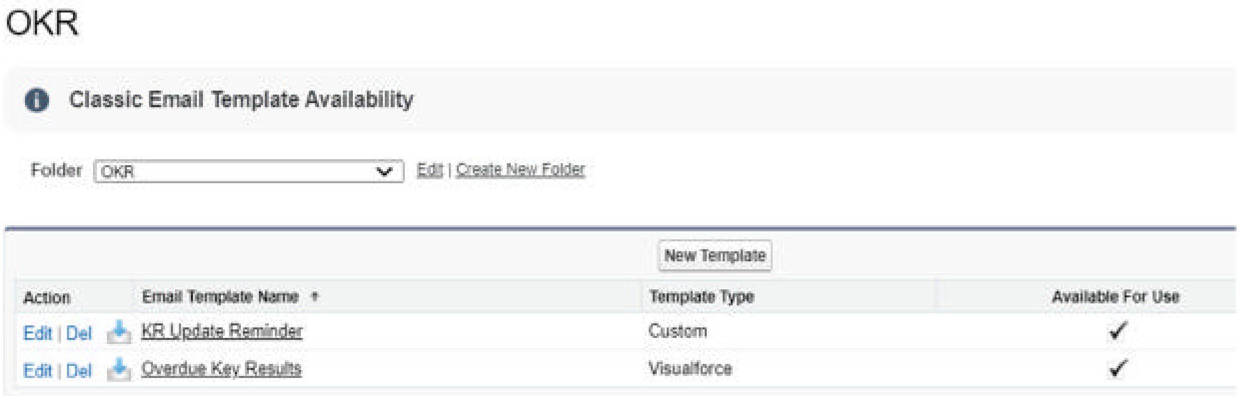


Consolidated Email Notification

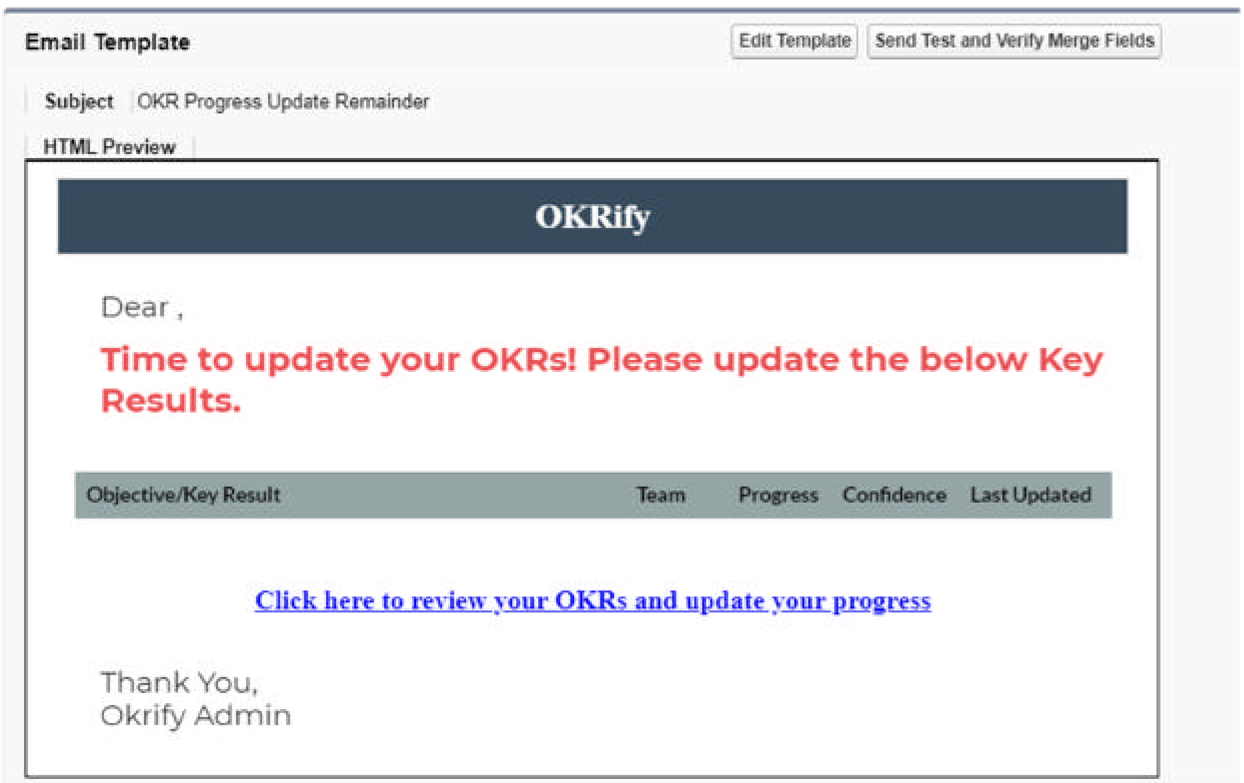
Consolidated weekly email notifications for overdue Key Results are sent using a background Apex Job, please schedule the apex job at appropriate times for sending email notifications. Consolidated weekly email notification uses a Visualforce type email template.

Go to Setup -> Classic Email Template

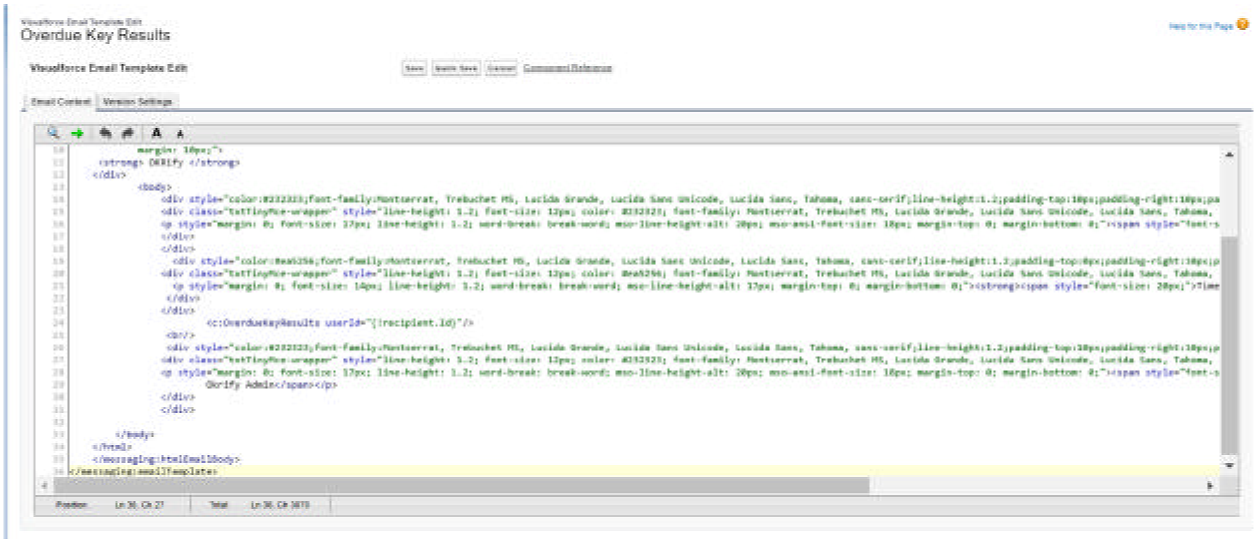
Overdue Key Results is the name of the email template for consolidated email notification. Click edit to change subject or click on the email template name to update the email notification.



Click Edit Template to update the template.



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.

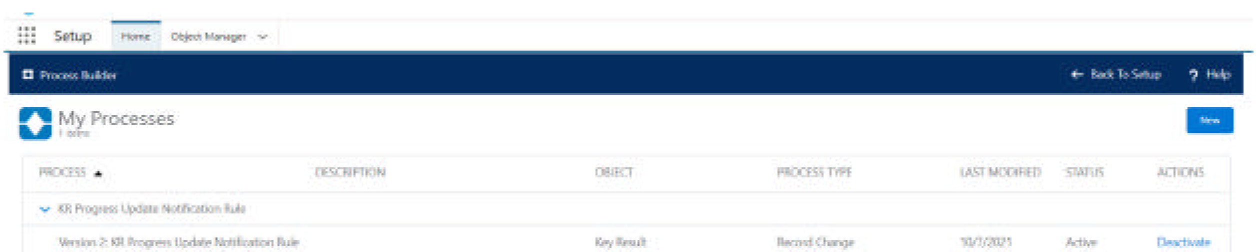


Deactivate Individual Key Result Email Notification Process Builder

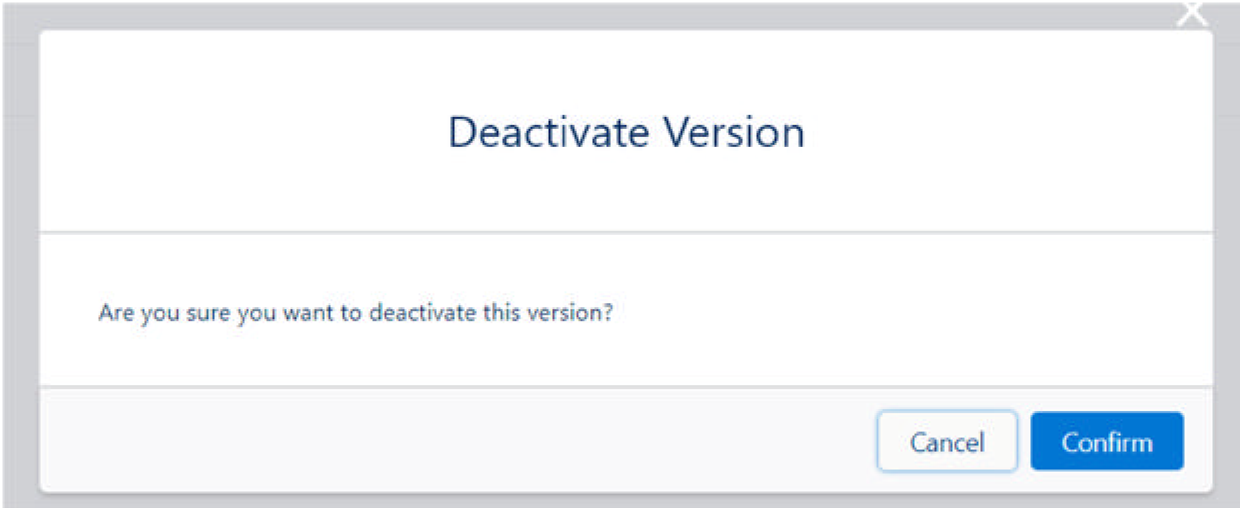
OKRify uses Process Builder – 'KR Progress Update Notification Rule' to send individual notifications for overdue Key Result progress updates.

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?
Cancel
Confirm


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
10/8/2021
Inactive