OKR Product Overview/Guide

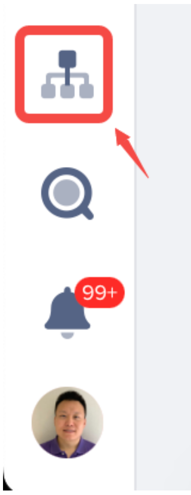
Overview

Not only can OKR help enterprises to clarify their organisational goals, but also measure the goals. Organization members can align their goals to boost overall efficiency & achieve common goals.
The OKR dashboard explicitly showed the fill & follow-up progress of the team, so the organization can learn from its mistakes and grow rapidly.

Basic Setups

First of all, the enterprise can do the following setups based on its own using habits: build up organization structure, configure OKR Visibility, and set up if the modification of OKR requires approvals and notifications.

Build up organization structure

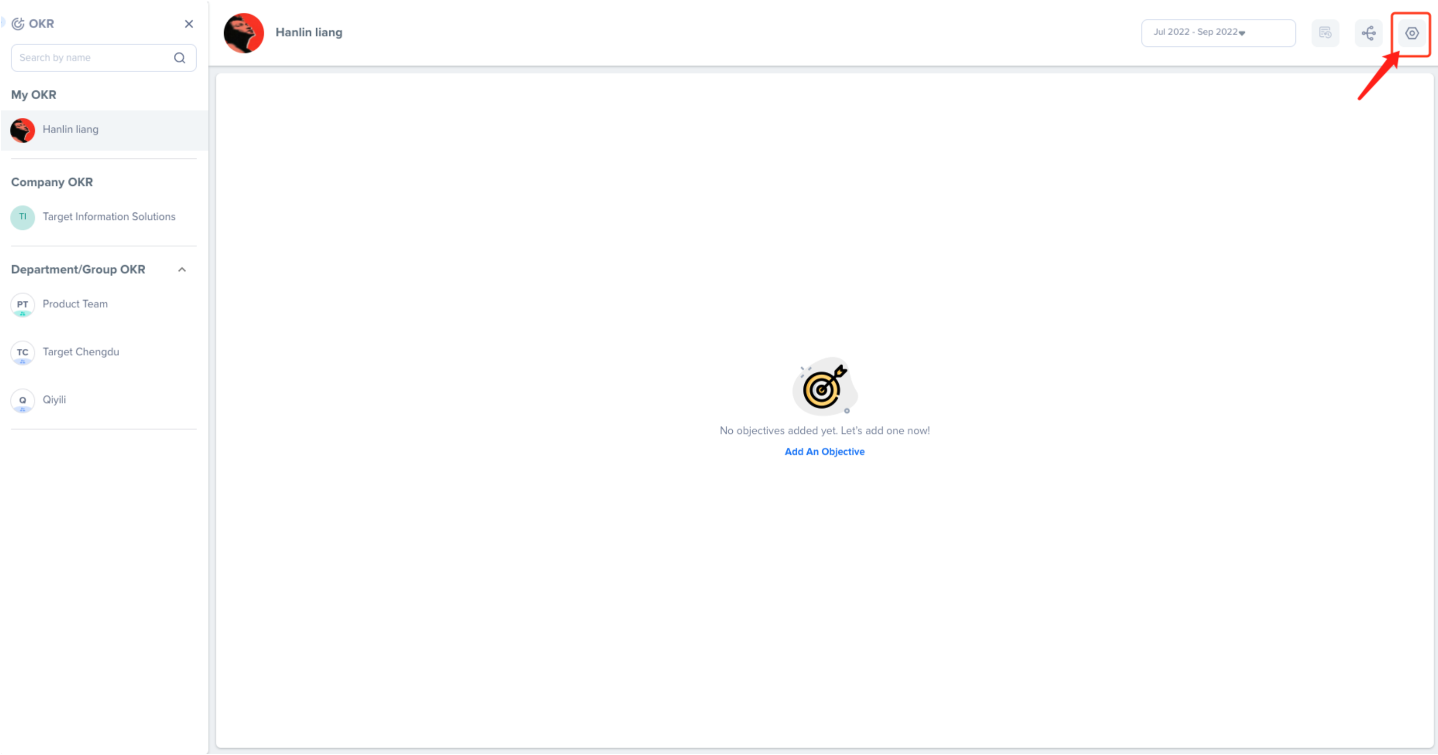


👆A shortcut to Organization Structure is through the icon at the bottom of the sidebar

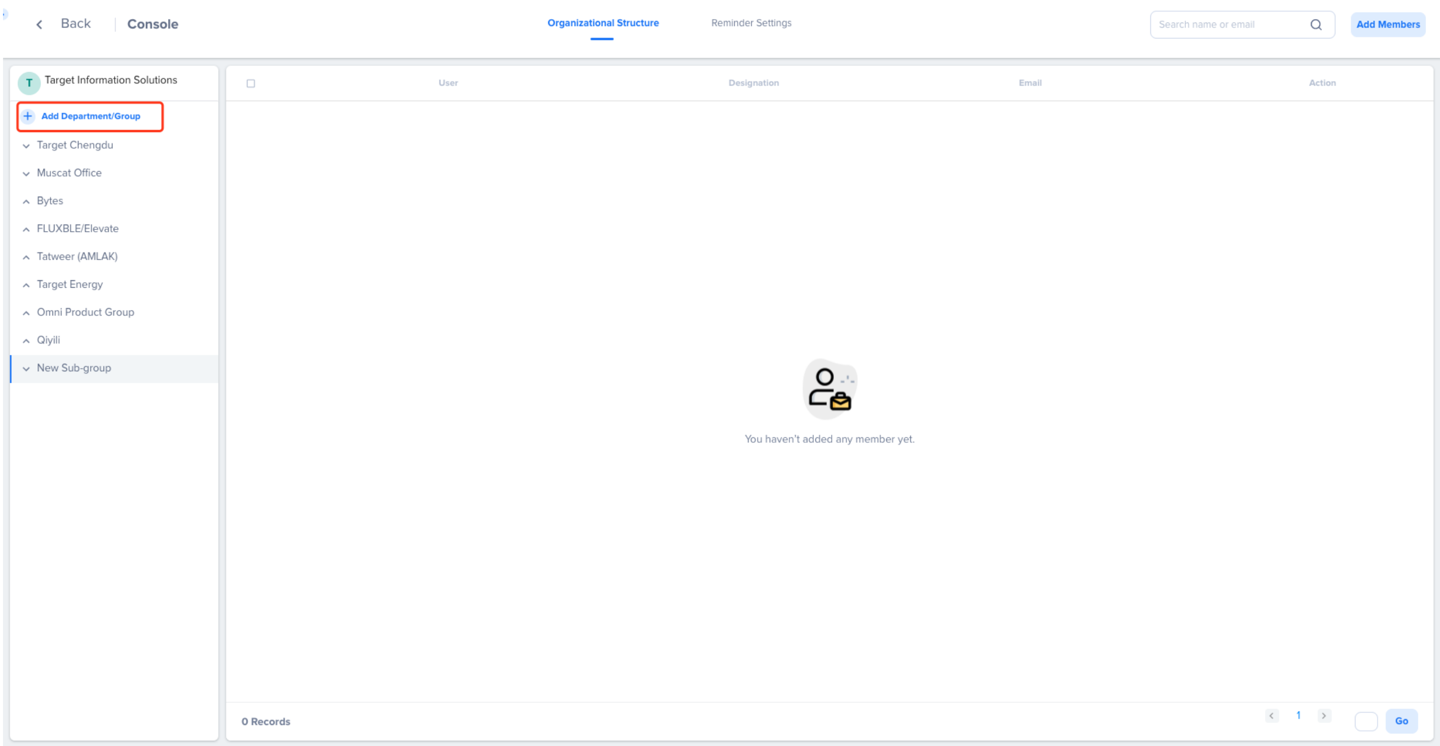
👇The path below is from within the OKR module:

1. Enter the organization structure page

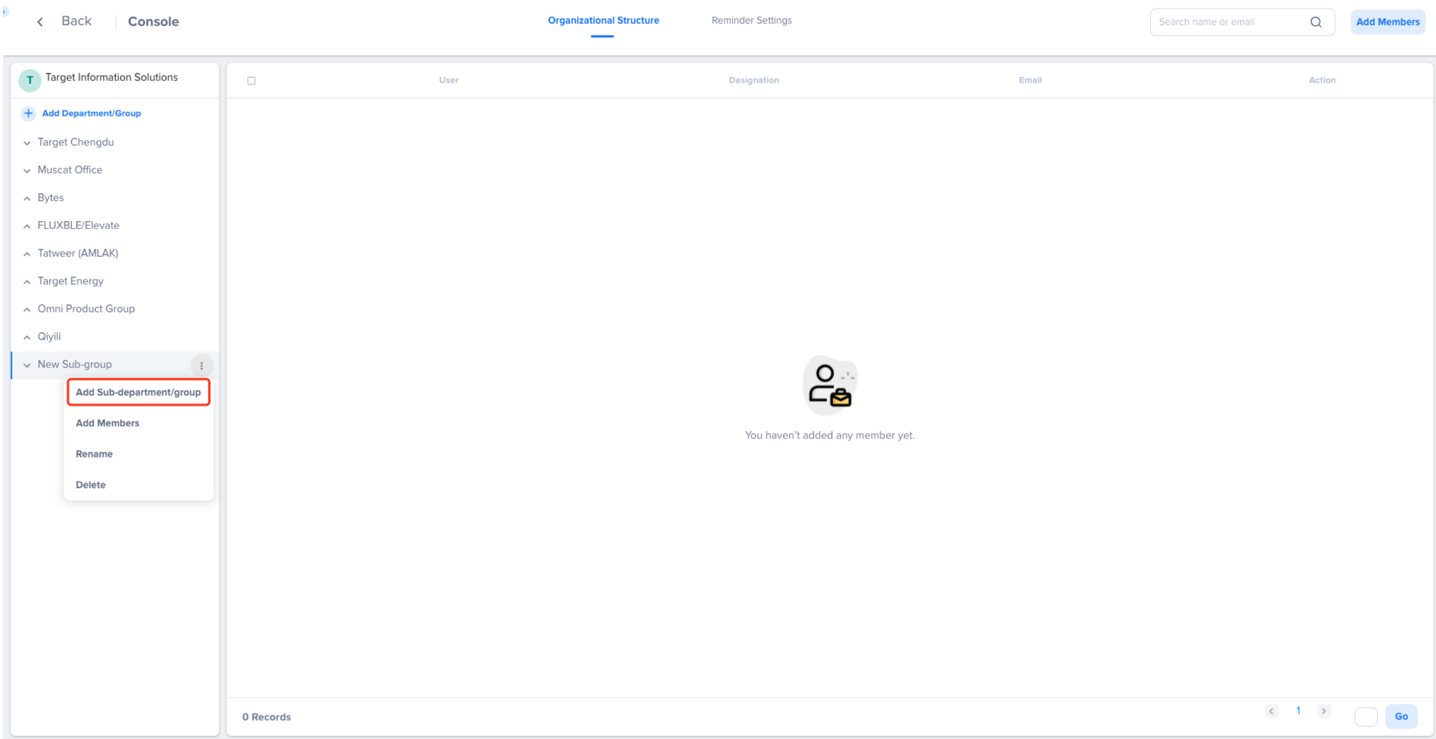
On the OKR home page, the organization manager can click the "console" button in the upper right corner, and enter the organization structure management page.



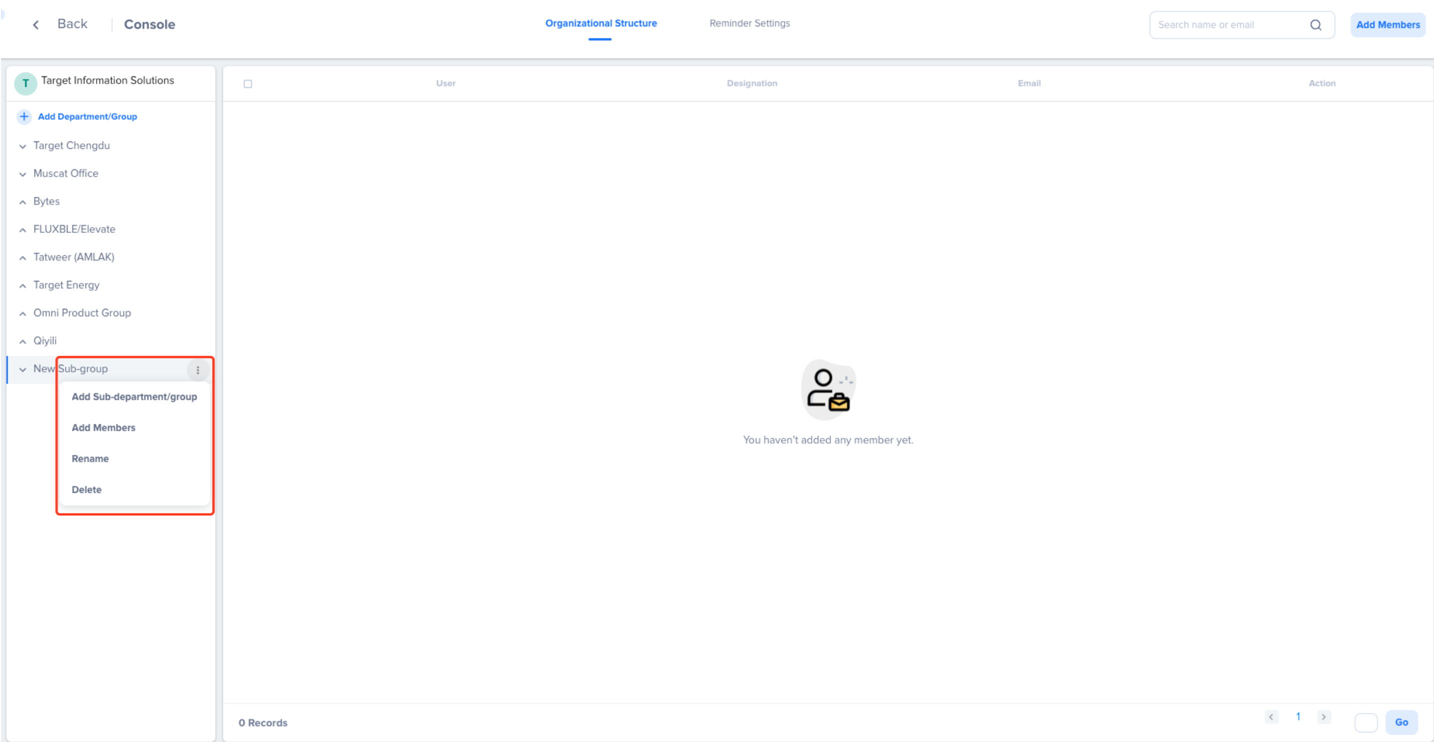
2. Build up the organisational structure of the company
   On the organization structure page, click the "Add Department/Group" button and create all the departments in the organization.



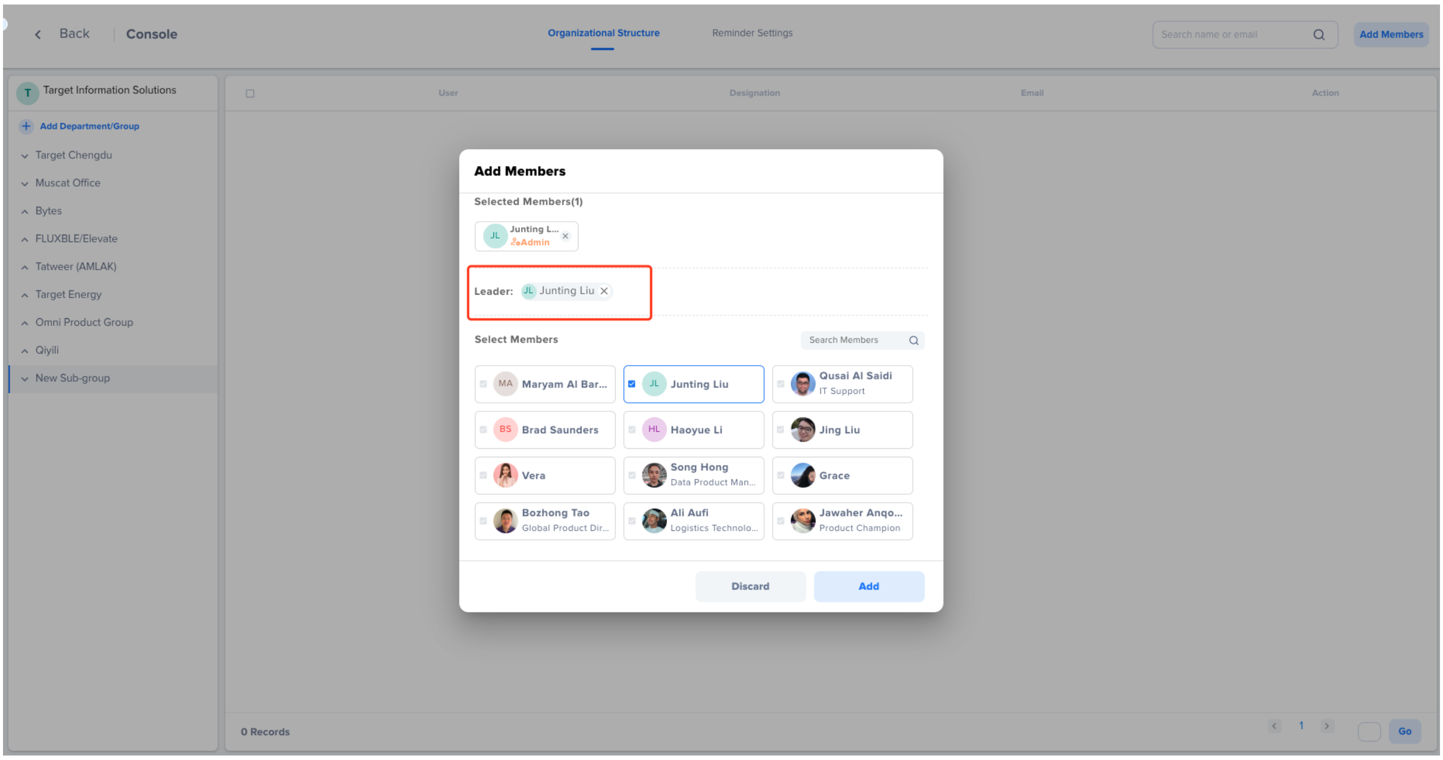
3. Add Sub-department/group
   The organization manager can add a sub-department/group under the department/group.



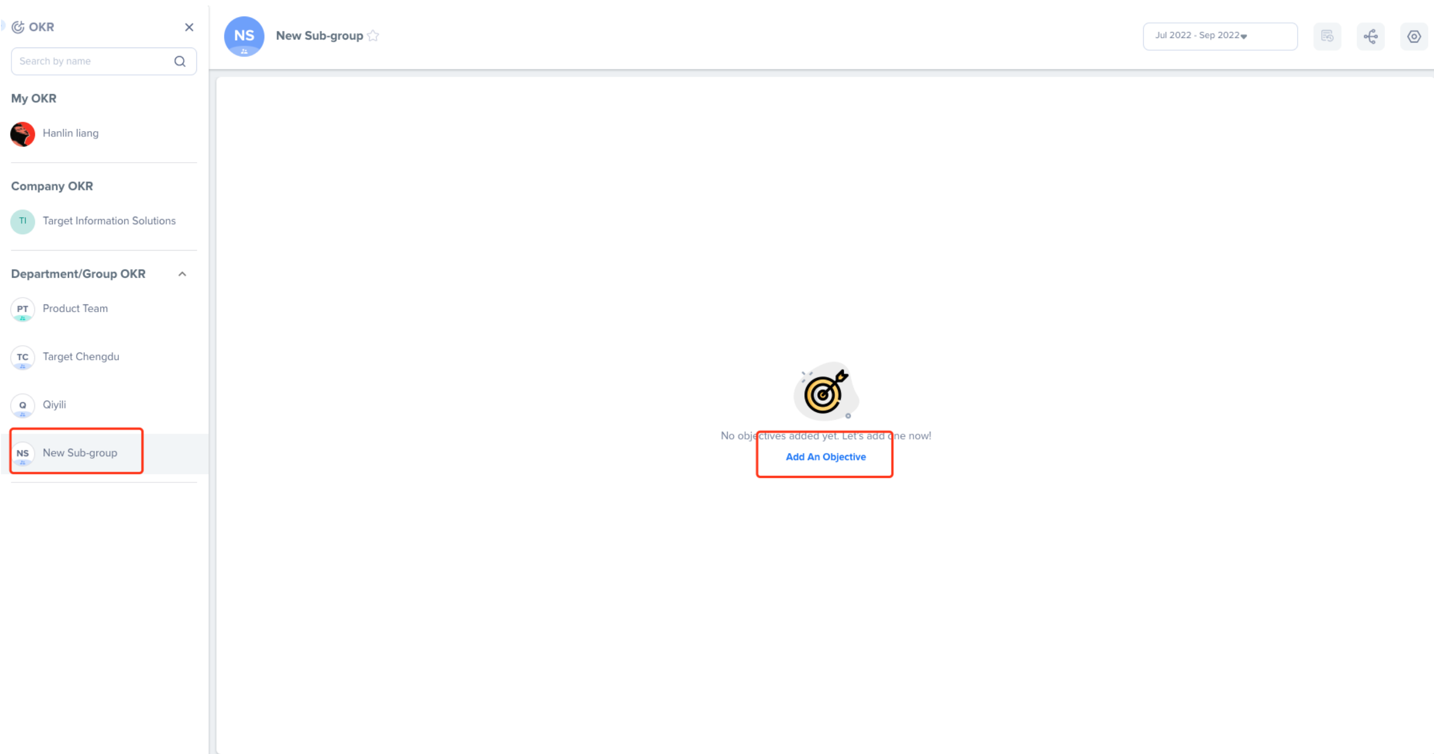
4. Manage organization structure
   In the "more" button of each group, there are functions such as "Add Sub-department/group", "Add Members", "Rename", and "Delete". The organization manager can continue to create sub-department/group, and add members to corresponding department/group.



5. Add leader
   Select "Add Members" after creating a department/group successfully, and add leader of the department/group in the "Add Members" pop-up window. The leader will be in charge of the department/group OKR. Click the "cross" sign following the leader to reselect a leader.



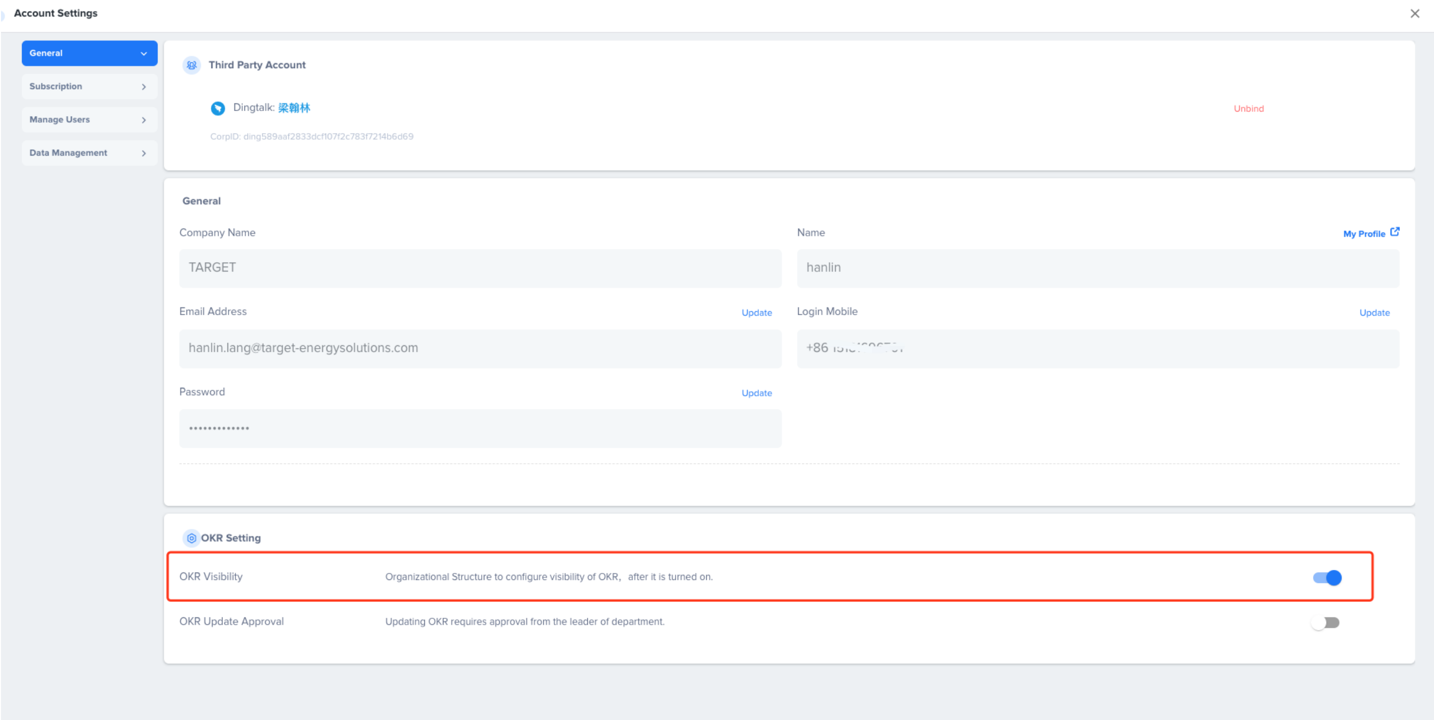
6. Manage department/group OKR
   The department/group leader added to the organization structure will take charge of the corresponding department/group. The members added to the department/group can see their department/group OKR on the OKR home page.



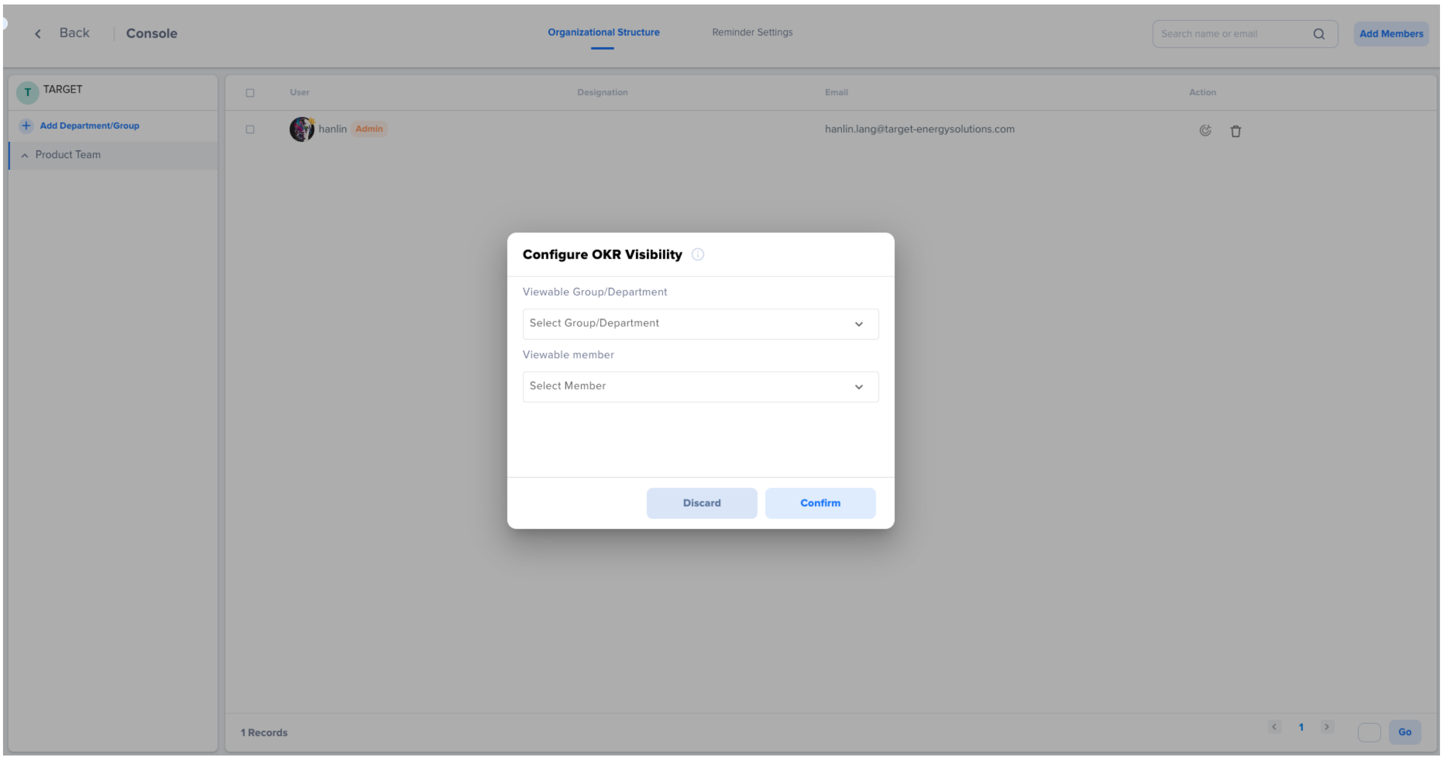
Configure OKR Visibility

1. The organization manager can select whether to turn on "OKR Visibility" in Account Settings - General - OKR Setting.

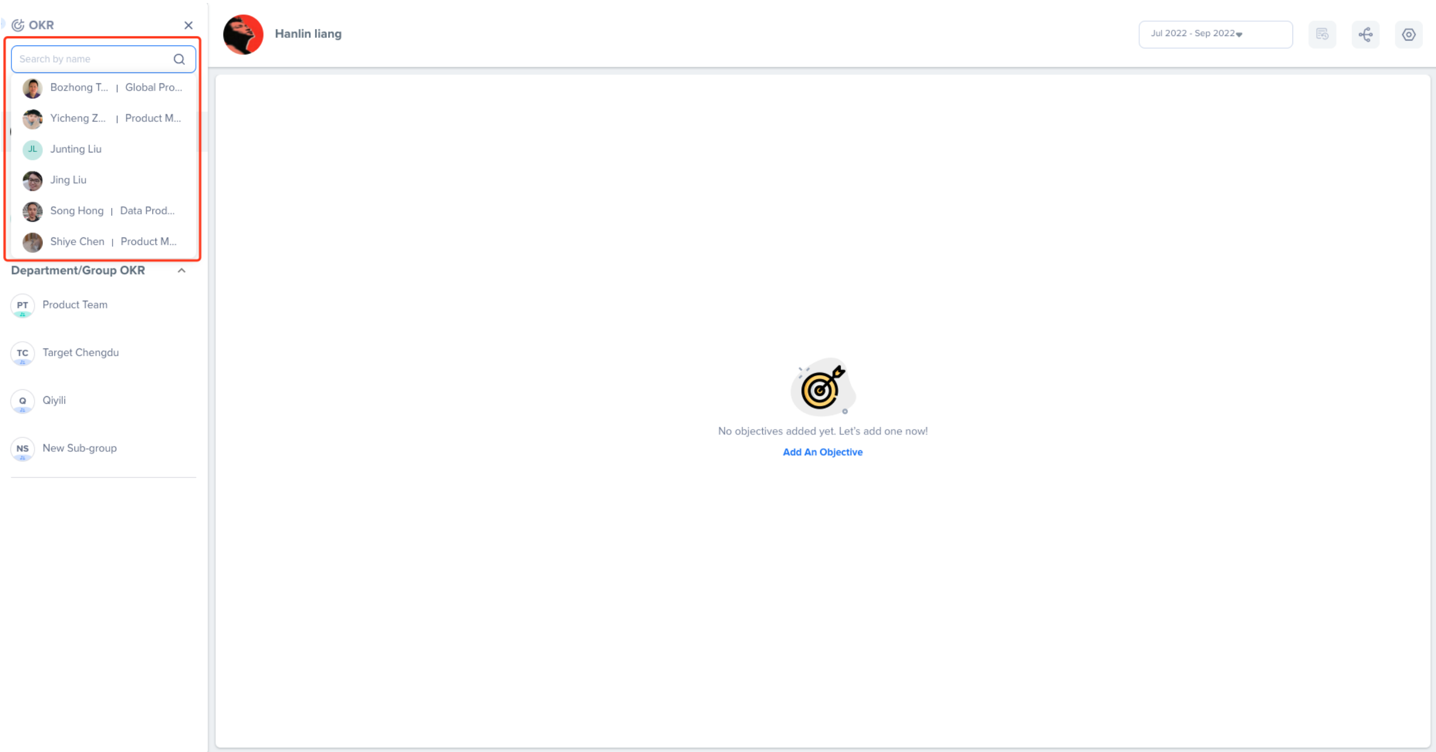
When the switch is turned off, the OKRs of all members in the organization are completely open and transparent, and the members can search and check other members' OKRs and alignment. When the switch is turned on, the users cannot see the OKRs information of other members and department, but can configure OKR Visibility of each department/group in the organization structure.



2. Configure OKR Visibility
   Click "Configure OKR Visibility", select department and members who can view OKRs in this Department/Group".

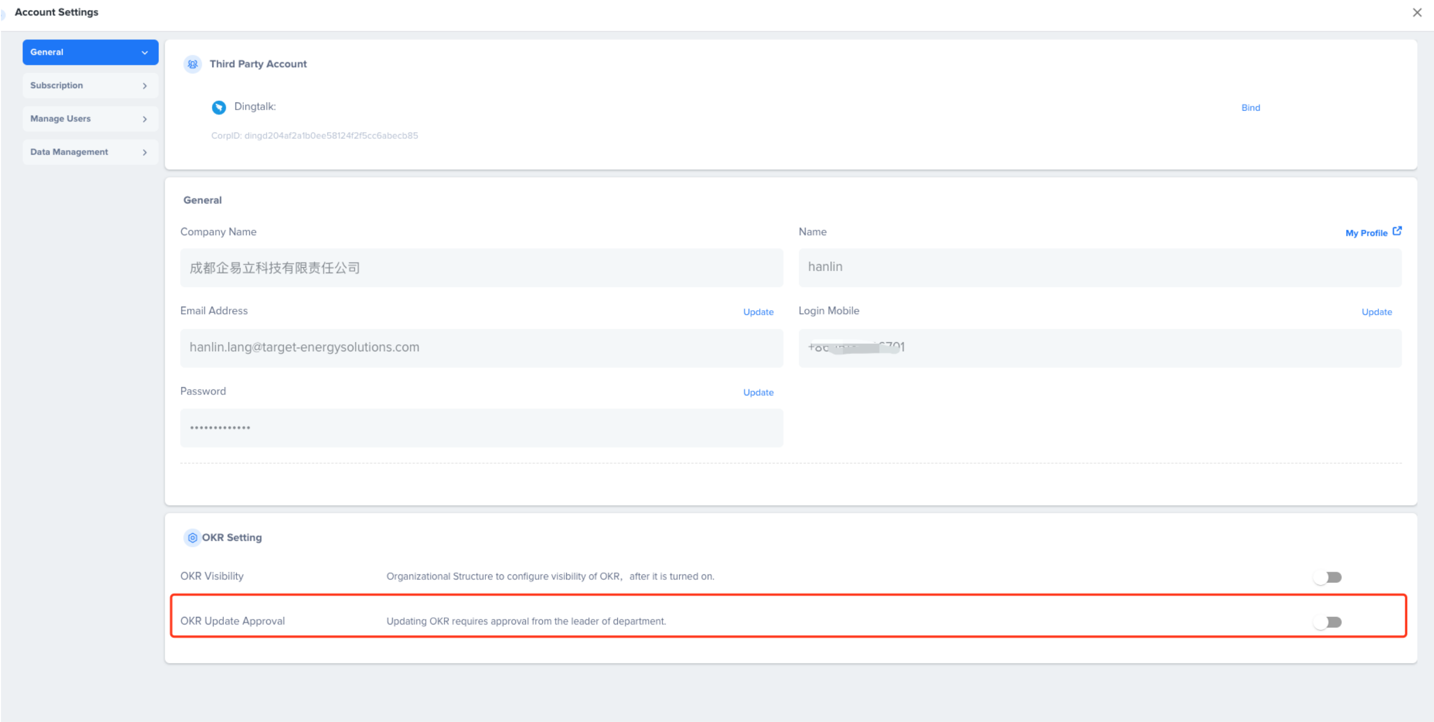


3. Configuration complete
   After OKR Visibility configuration is complete, in search boxes "search member" and "add alignment", only members and departments/groups which have been set to visible can be searched.

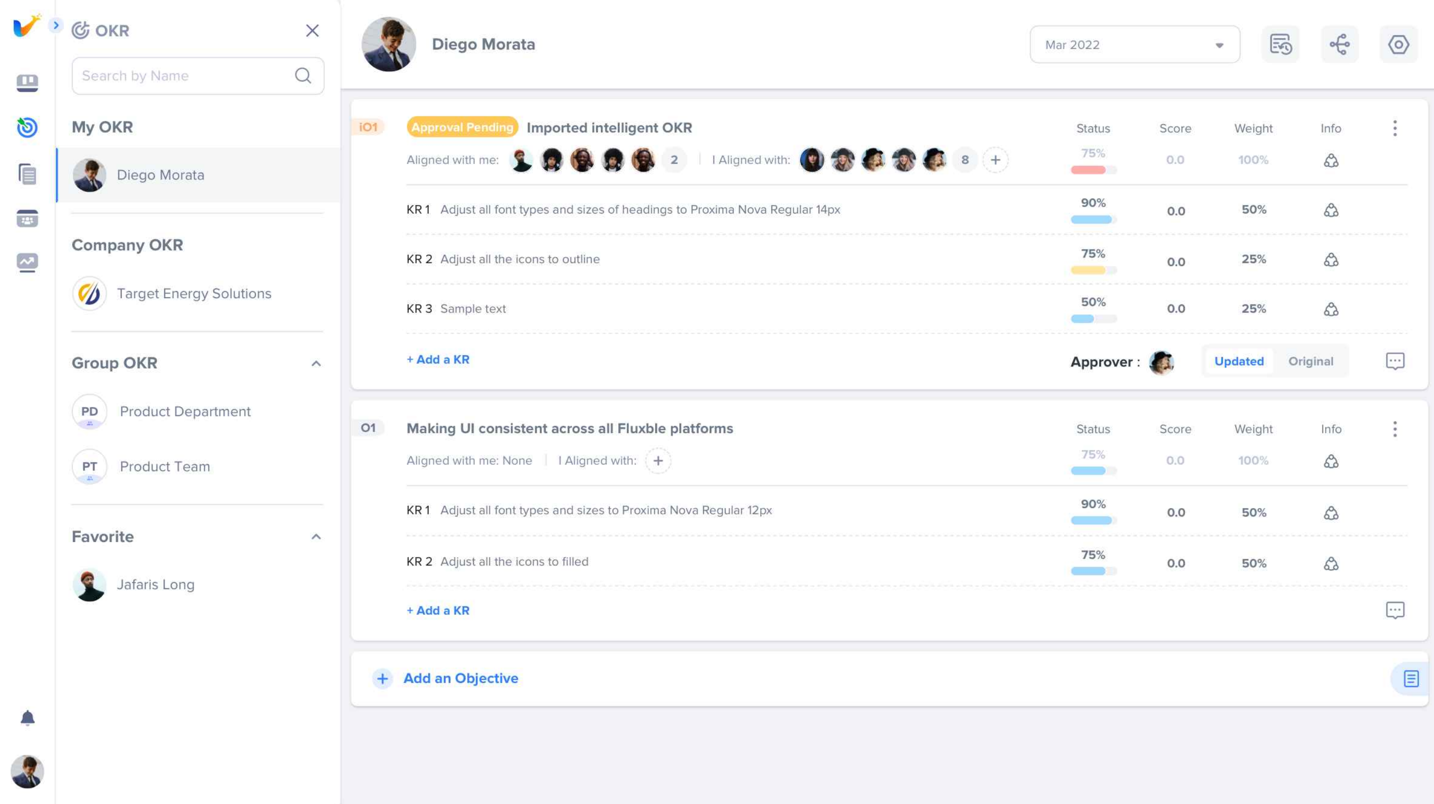


OKR modification and approval

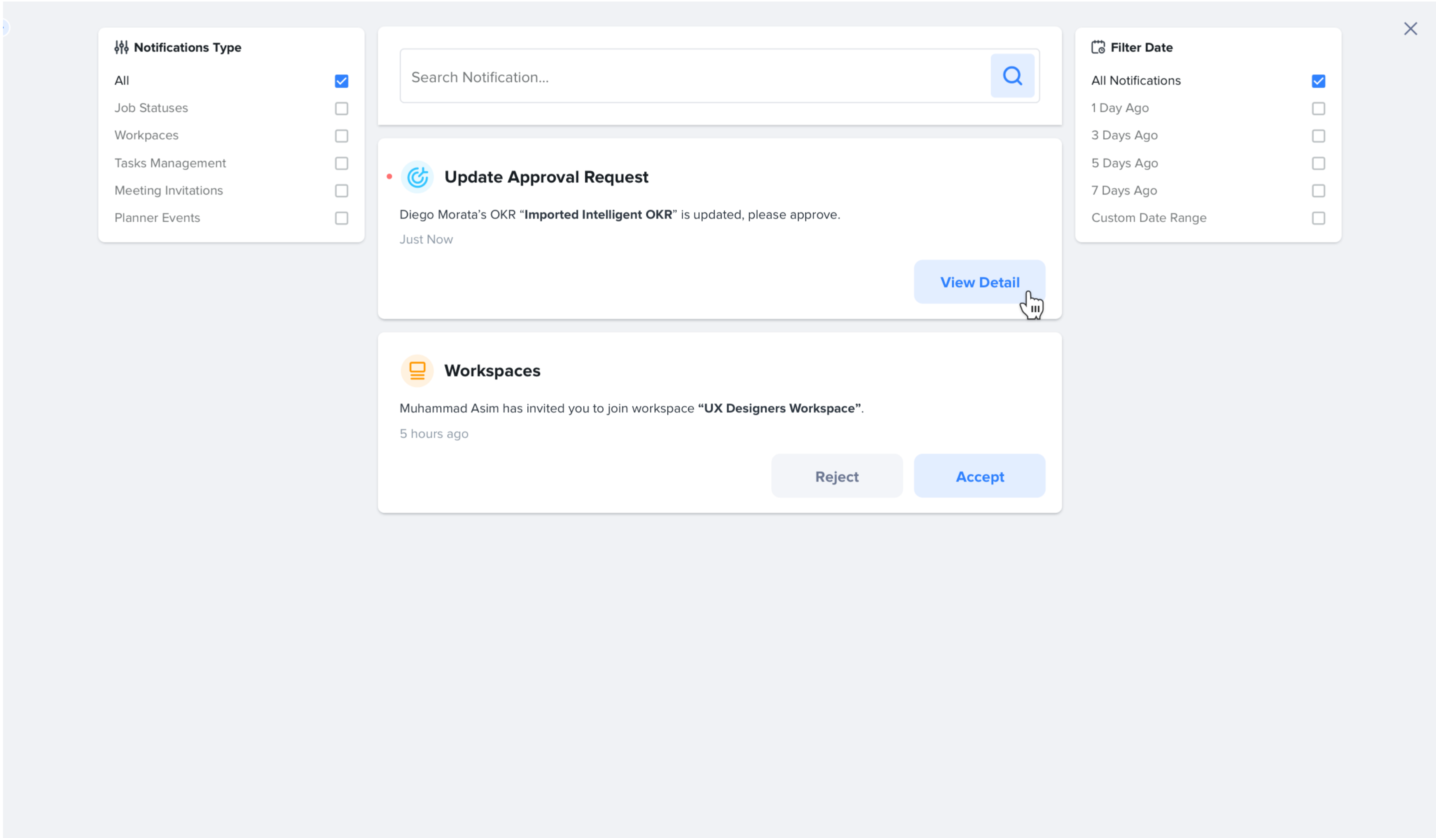
1. The organization manager can select whether to turn on "OKR Update Approval" switch in Account Settings - General - OKR Setting.
   When the switch is turned off, the user's OKR can be freely edited. When the switch is turned on, it requires department/group leader's approval to update OKR.

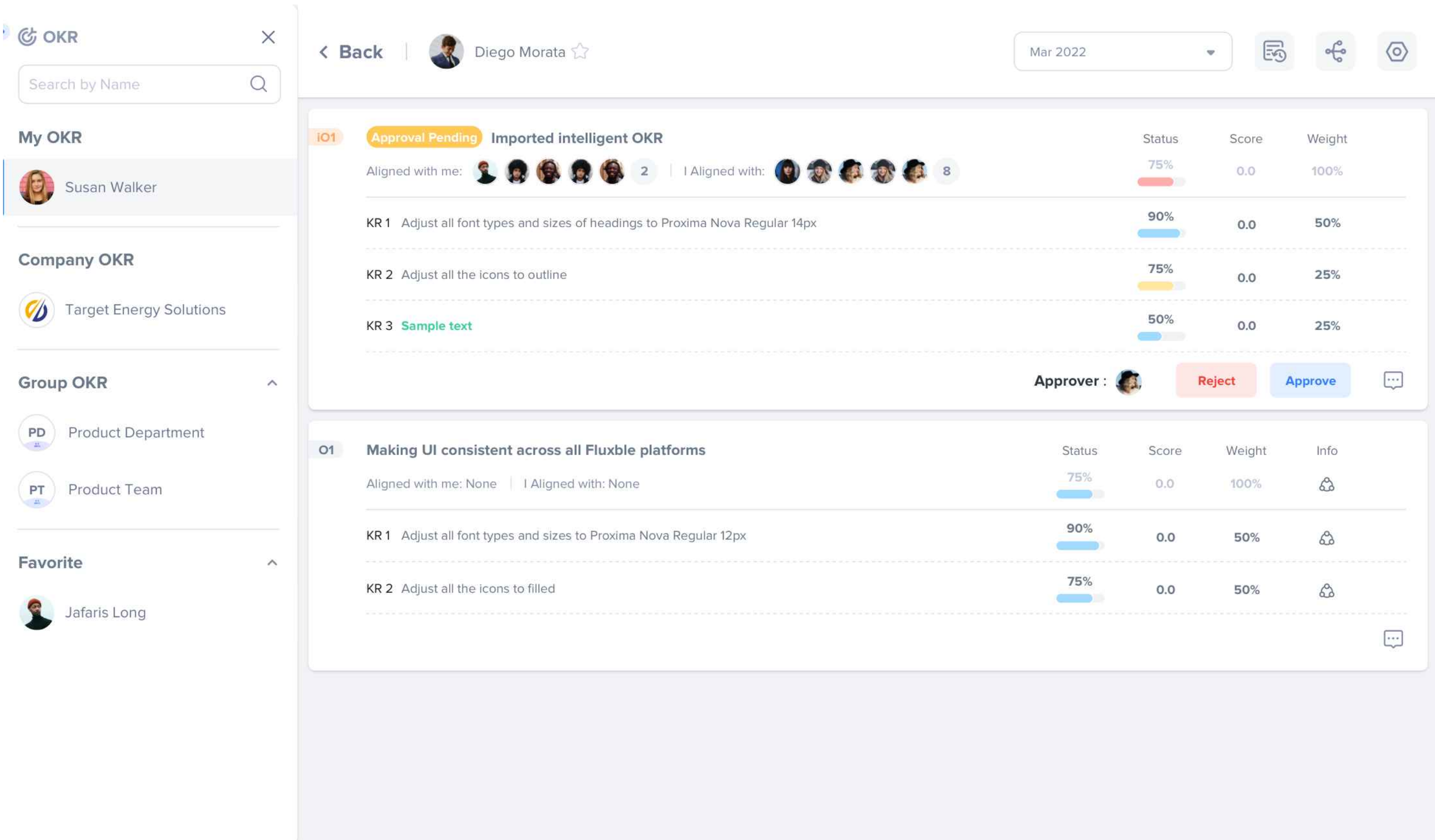


2. After the user completes editing OKR, the status of OKR is "Approval Pending". The user can view approver and the content of OKR before and after modification. It also supports the user recalling and revising the edit before it gets approved/rejected.



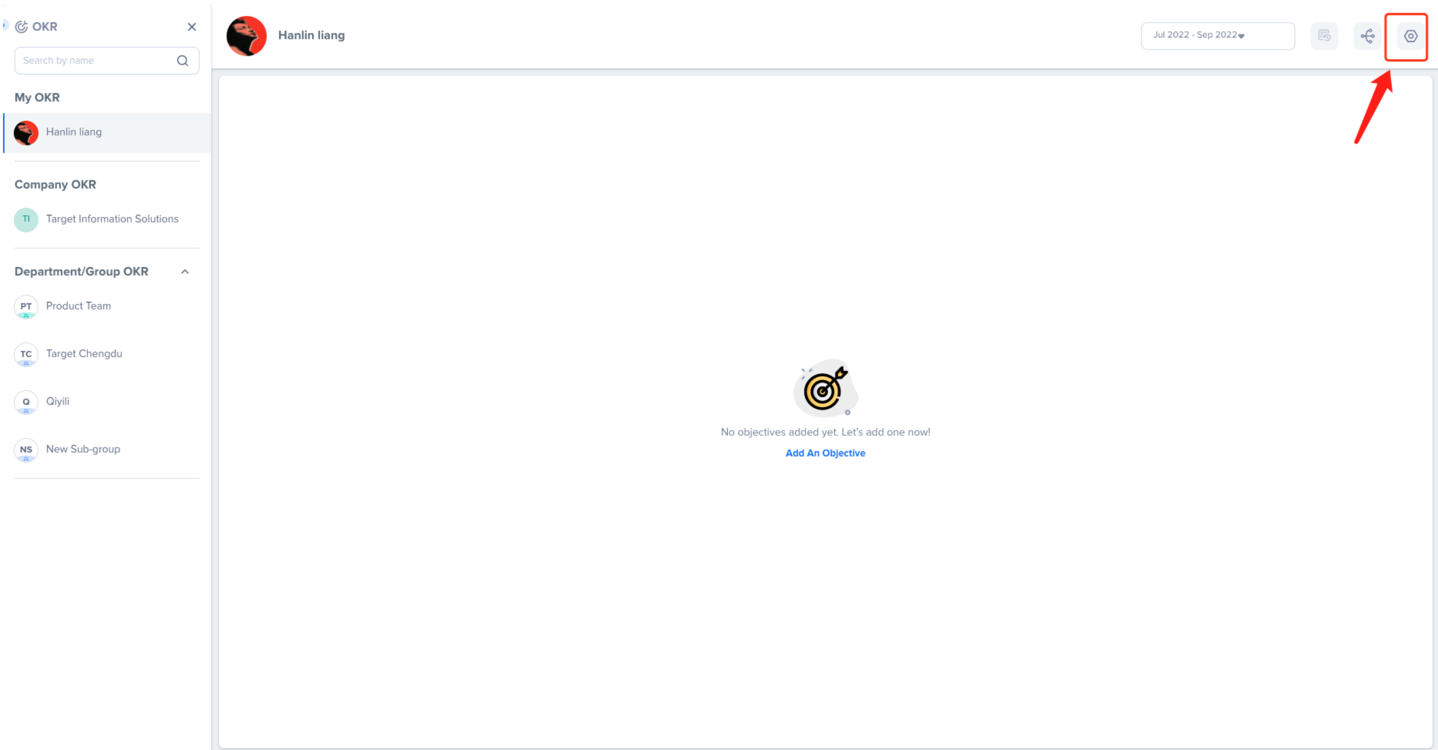
3. After the department/group leader receives the approval application notification, he/she can click the notification which will bring him/her onto the member's OKR home page to approve or reject the application.



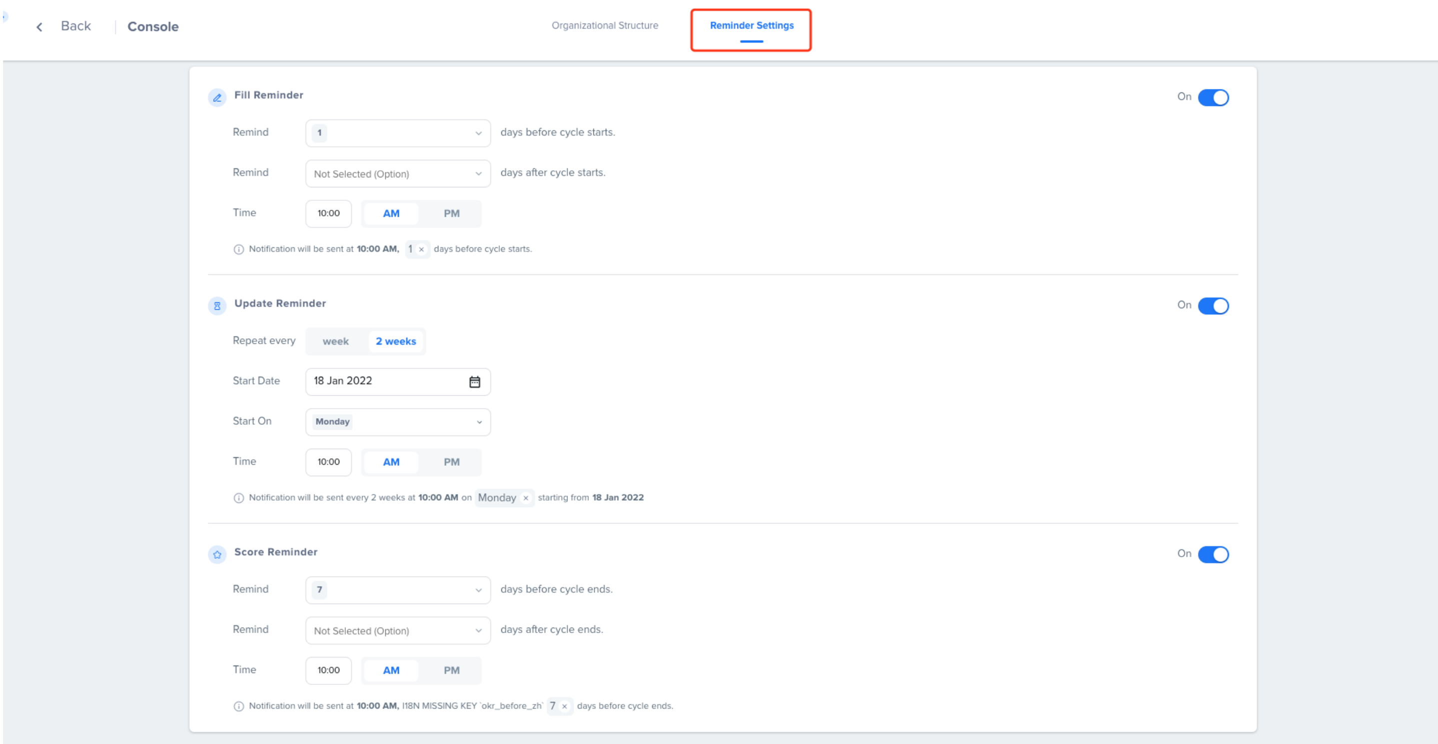


Reminder Settings

1. The manager enters the 【**Console**】



2. Click on the "Reminder Settings" tab, and he/she can set "Fill Reminder", "Update Reminder", and "Score Reminder"
   After the "Fill Reminder", "Update Reminder", and "Score Reminder" switches are turned on, the user can set up the notification sending time and frequency, and the system will send the notification automatically based on the setup.



Configure OKR

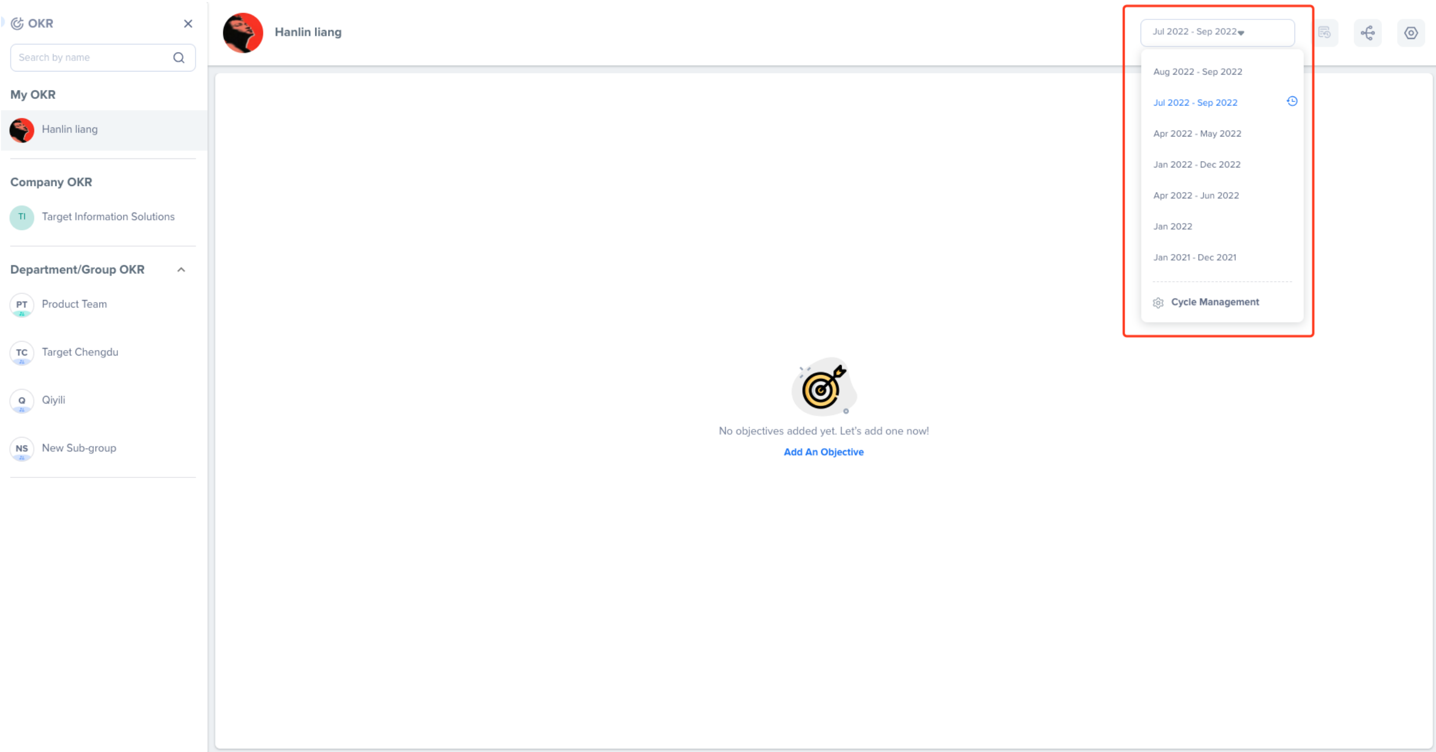
After the basic setting is completed, organization manager can further configure OKR to set up OKR cycles, set visibility of organization/department and leaders/managers' OKR, fill in the

OKRs, associate tasks & charts, add alignment and more...

Setup OKR Cycle

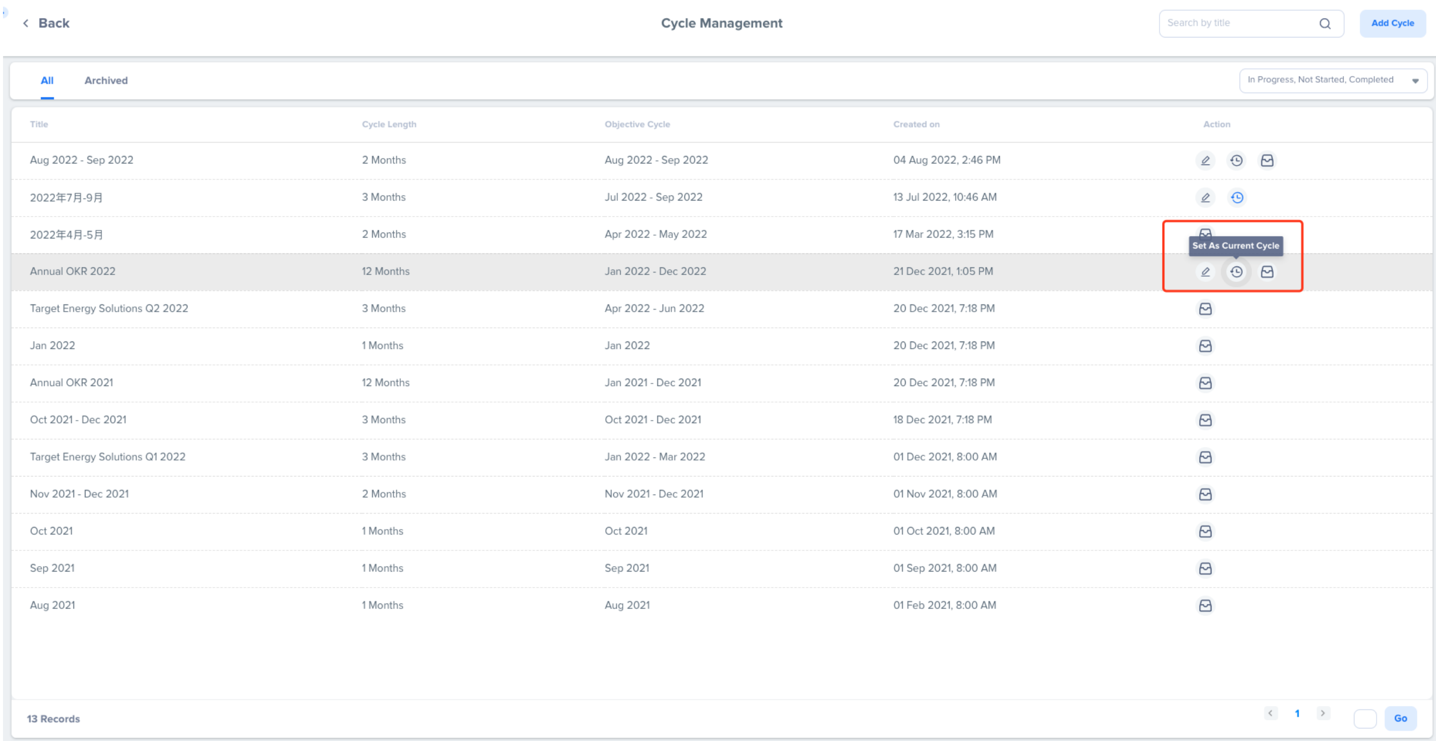
1. Select a cycle.

Select the current cycle in use in the cycle selector to ensure that all members of the organization are using OKR under the same cycle.



2. Manage cycle

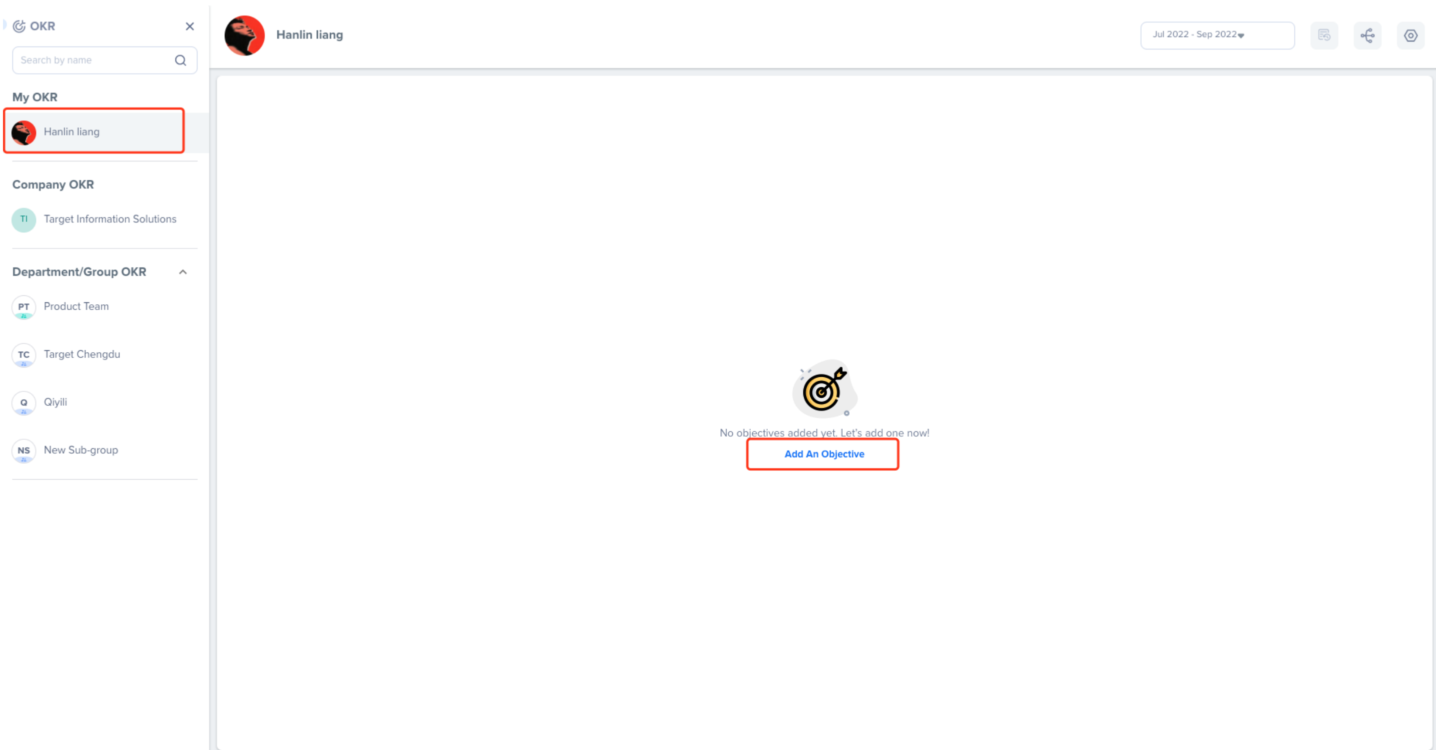
The administrator can click the "Cycle Management" button in the cycle selection list to enter the cycle management page to manage all cycles, or set a cycle as the "current cycle", so that all members of the organization can work under the same cycle. Operation of OKR.



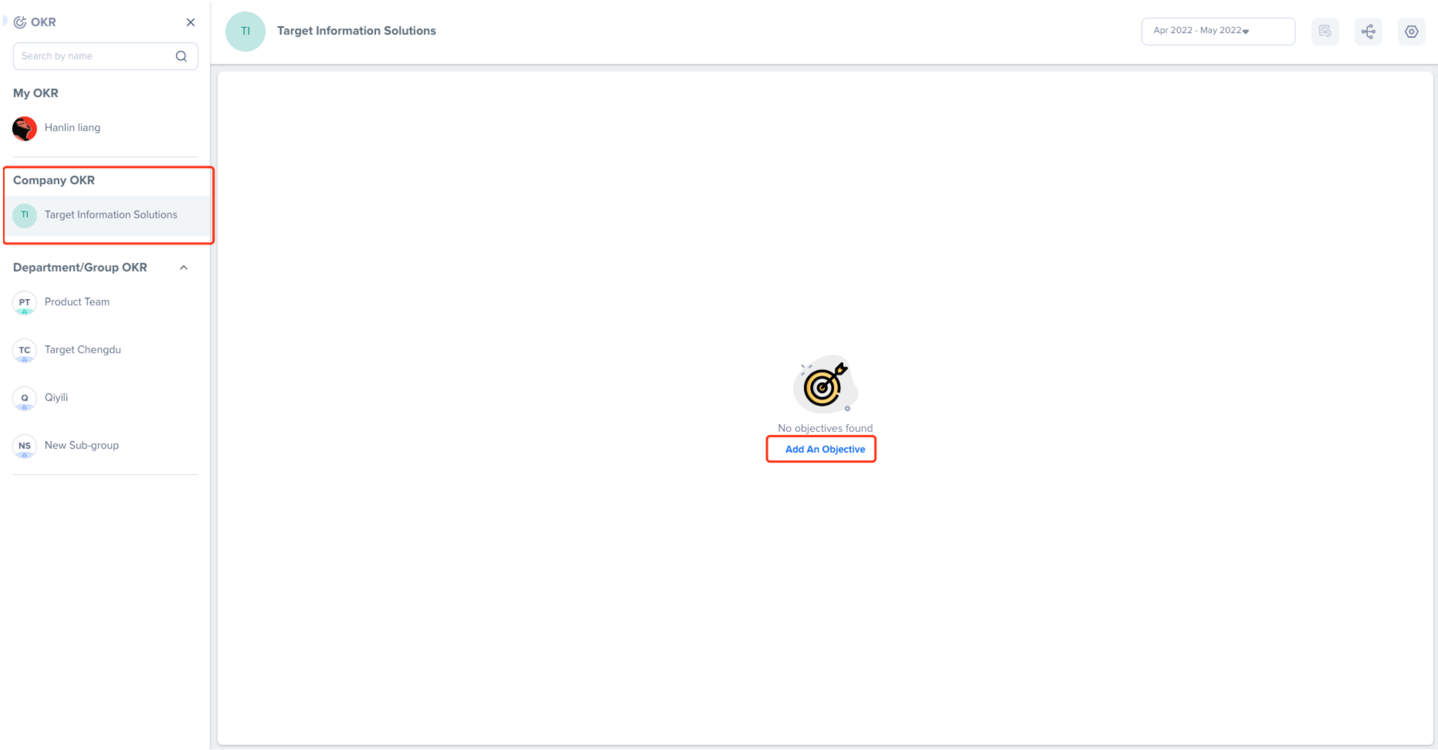
Title	Cycle Length	Objective Cycle	Created on	Action
Aug 2022 - Sep 2022	2 Months	Aug 2022 - Sep 2022	04 Aug 2022, 2:46 PM	
2022年7月-9月	3 Months	Jul 2022 - Sep 2022	13 Jul 2022, 10:46 AM	
2022年4月-5月	2 Months	Apr 2022 - May 2022	17 Mar 2022, 3:15 PM	
Annual OKR 2022	12 Months	Jan 2022 - Dec 2022	21 Dec 2021, 1:05 PM	
Target Energy Solutions Q2 2022	3 Months	Apr 2022 - Jun 2022	20 Dec 2021, 7:18 PM	
Jan 2022	1 Months	Jan 2022	20 Dec 2021, 7:18 PM	
Annual OKR 2021	12 Months	Jan 2021 - Dec 2021	20 Dec 2021, 7:18 PM	
Oct 2021 - Dec 2021	3 Months	Oct 2021 - Dec 2021	18 Dec 2021, 7:18 PM	
Target Energy Solutions Q1 2022	3 Months	Jan 2022 - Mar 2022	01 Dec 2021, 8:00 AM	
Nov 2021 - Dec 2021	2 Months	Nov 2021 - Dec 2021	01 Nov 2021, 8:00 AM	
Oct 2021	1 Months	Oct 2021	01 Oct 2021, 8:00 AM	
Sep 2021	1 Months	Sep 2021	01 Sep 2021, 8:00 AM	
Aug 2021	1 Months	Aug 2021	01 Feb 2021, 8:00 AM	

Personal OKR, corporate OKR, departmental OKR

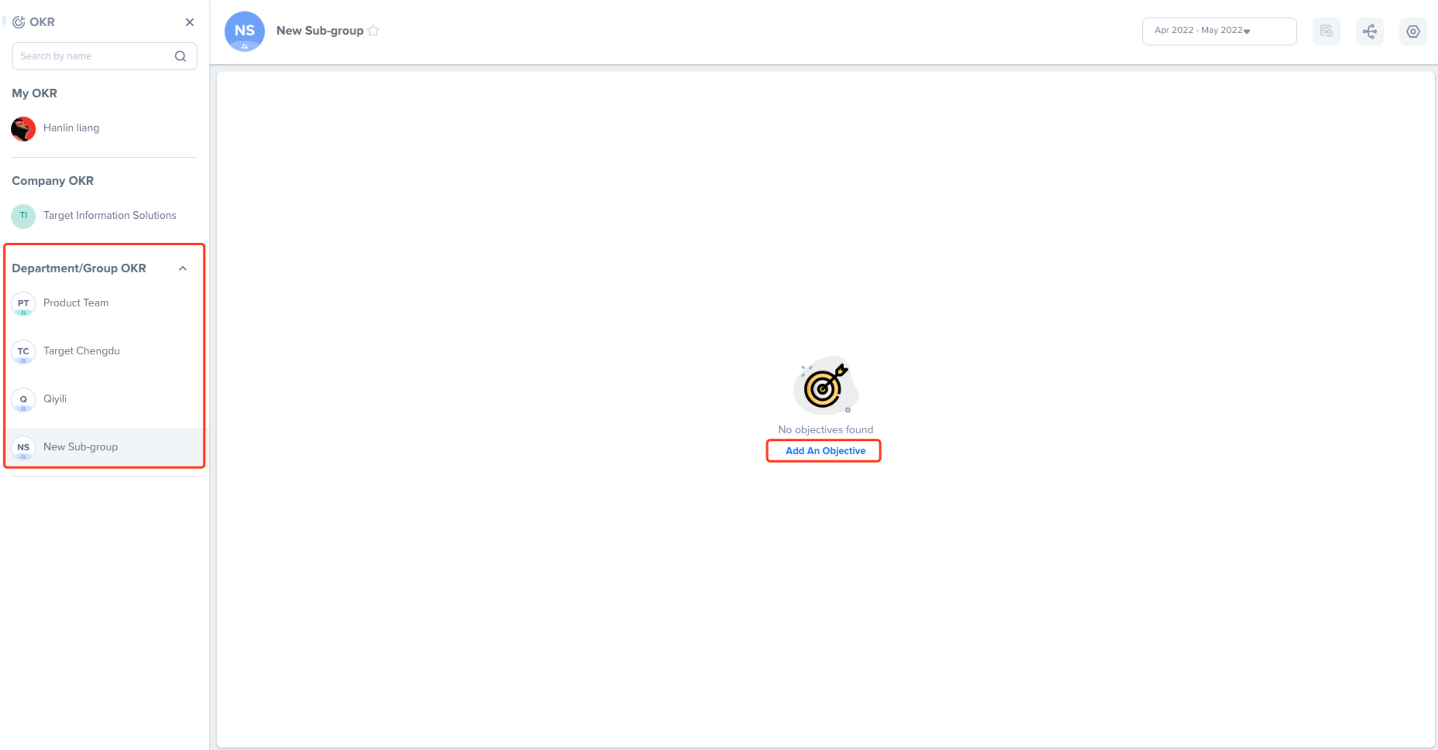
1. My OKR: Every user can fill in their own OKR on the OKR homepage.



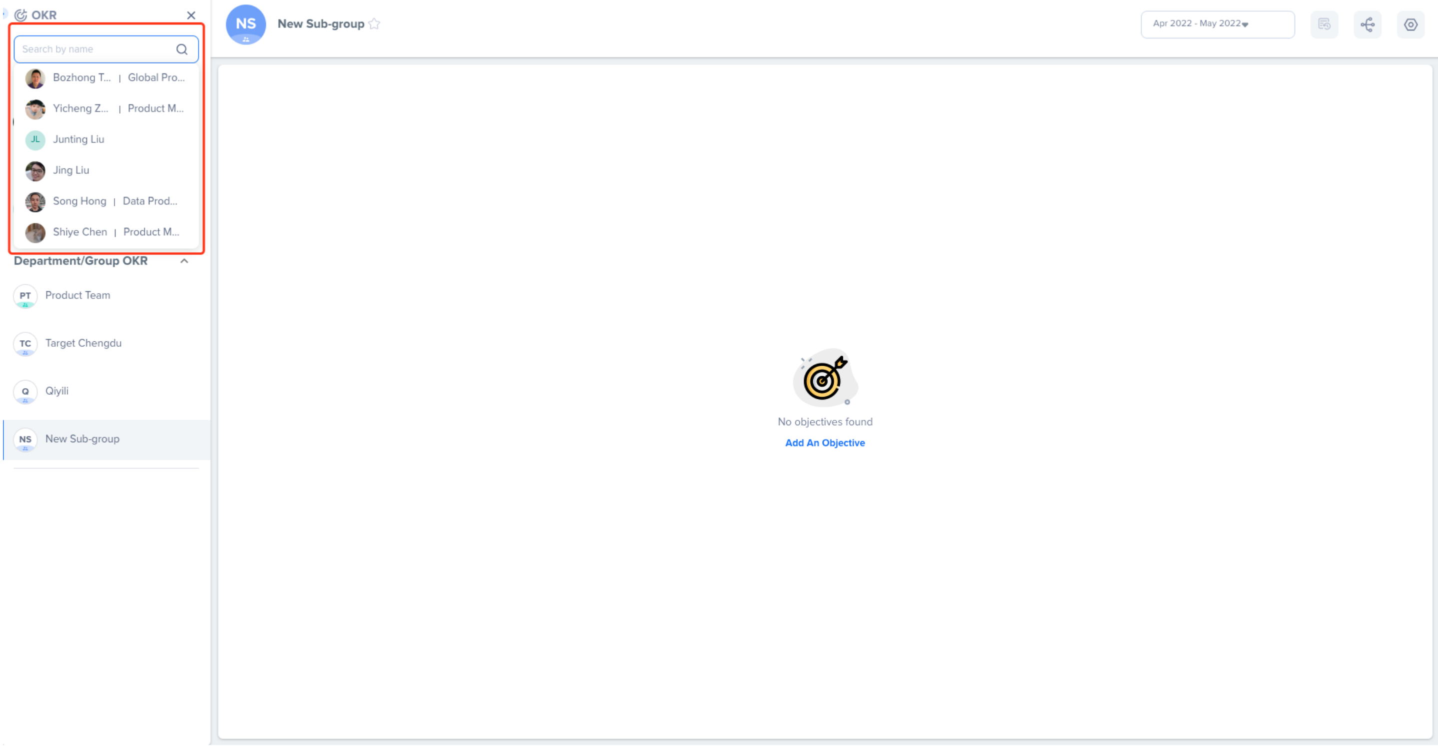
2. Company OKR: Organization administrators can manage (fill in, delete, and edit) company OKR, and members of the organization can view company OKR.



3. Department OKR: Leader can manage the OKR of their own departments.

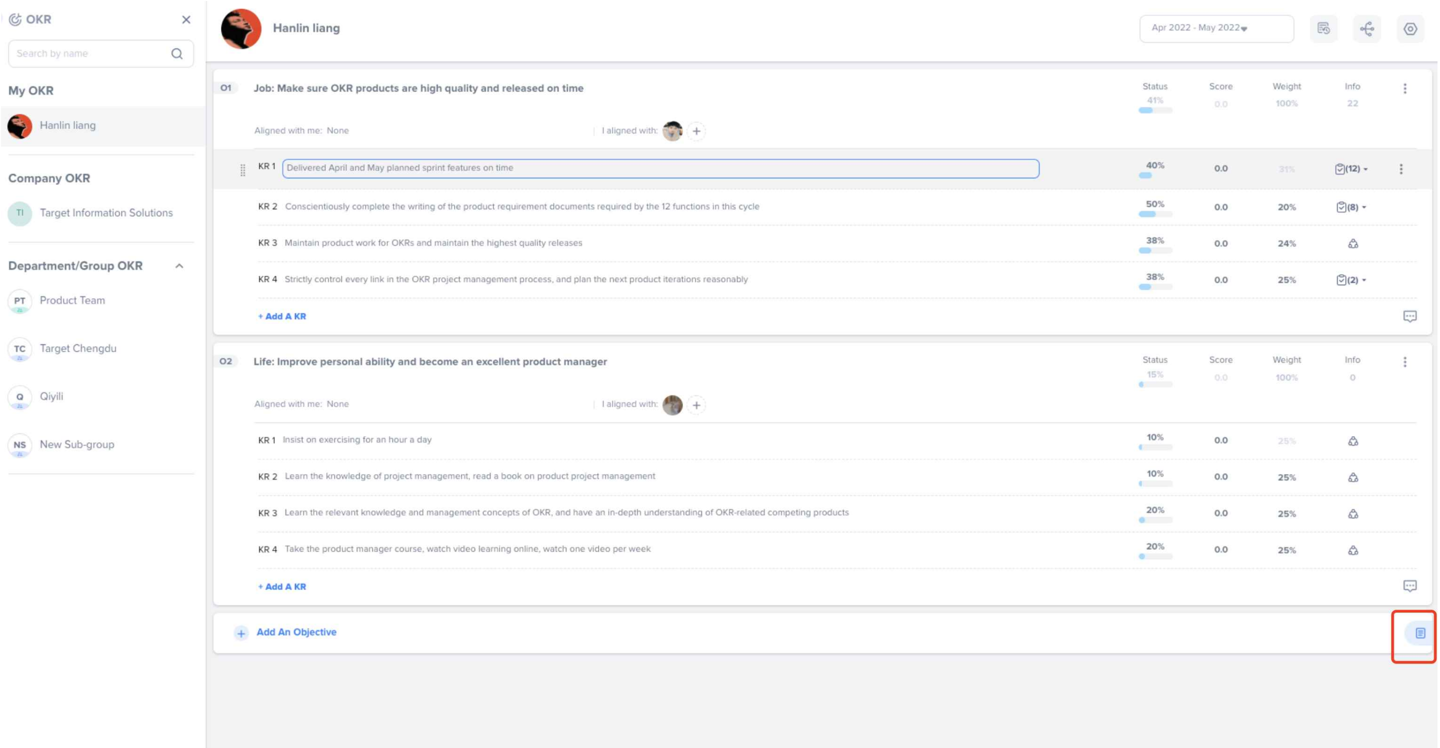


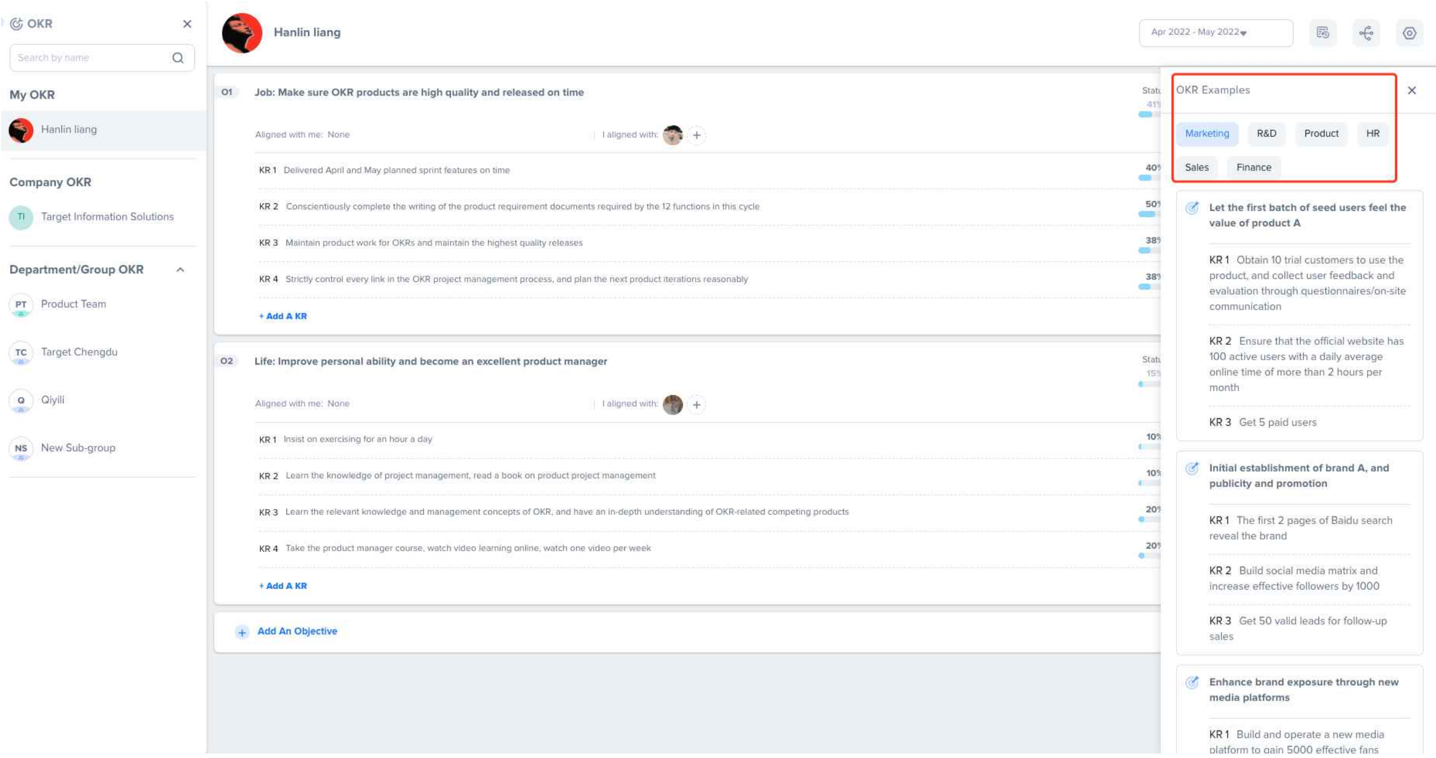
4. Search the OKR of other members of the company, for example: view the OKR of department leaders.



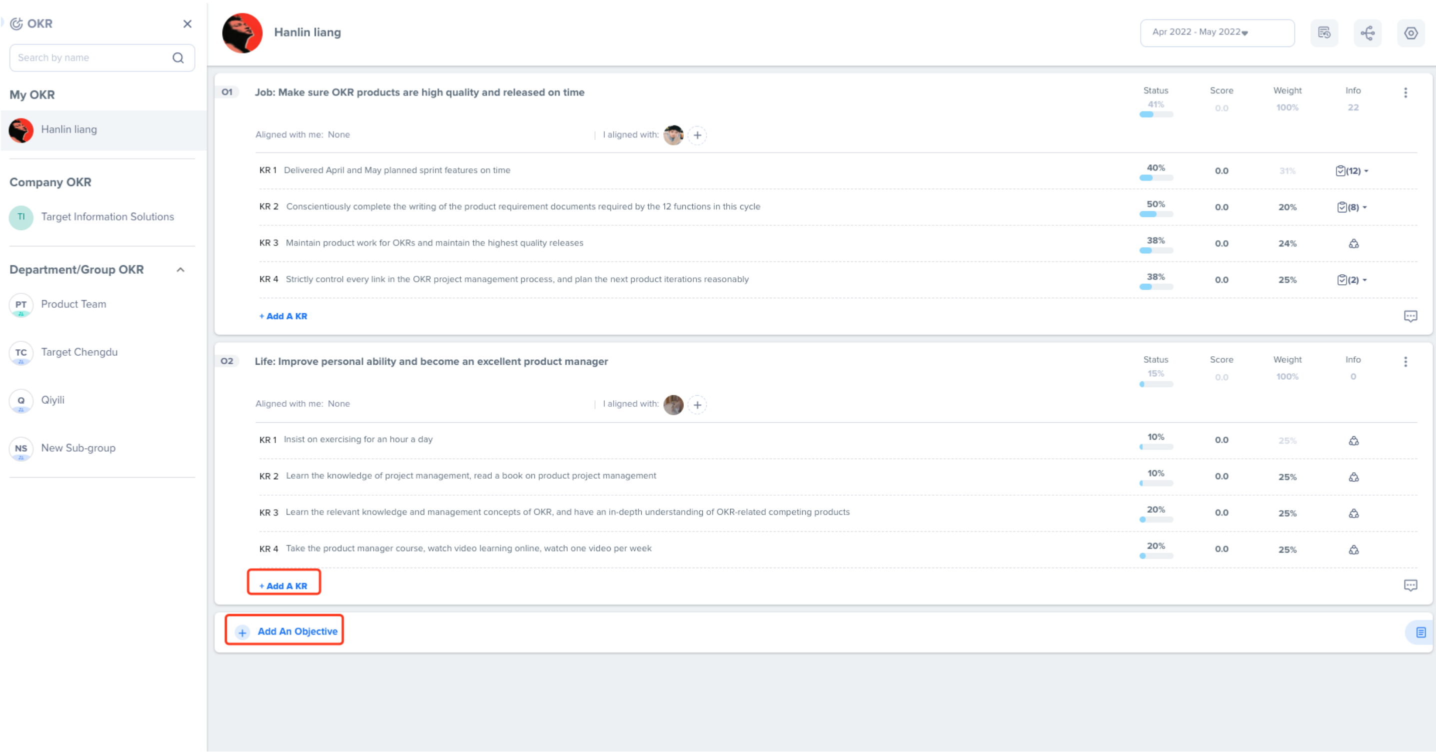
Fill in OKR

1. Click "Case" to open the OKR case library. When filling in OKR, you can refer to the OKR templates of different positions to assist in filling in.

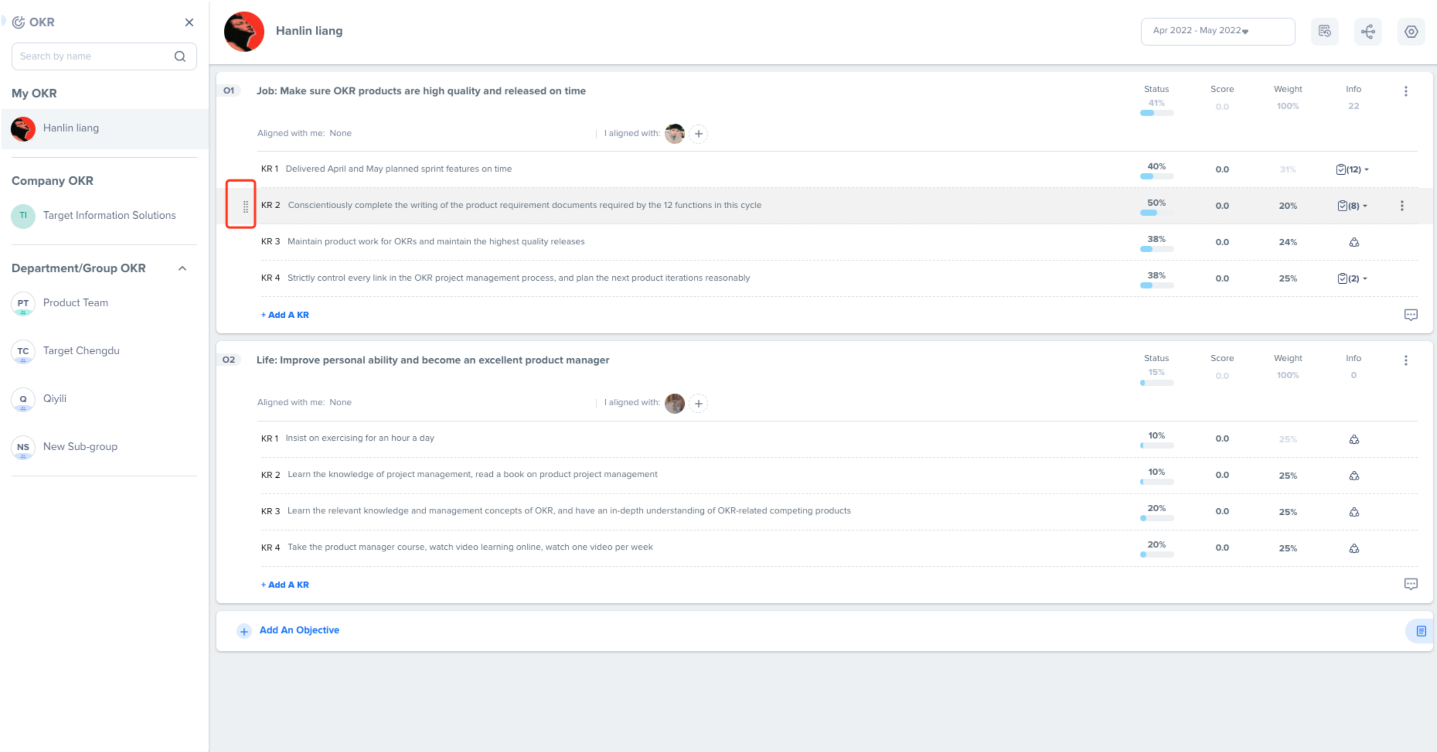




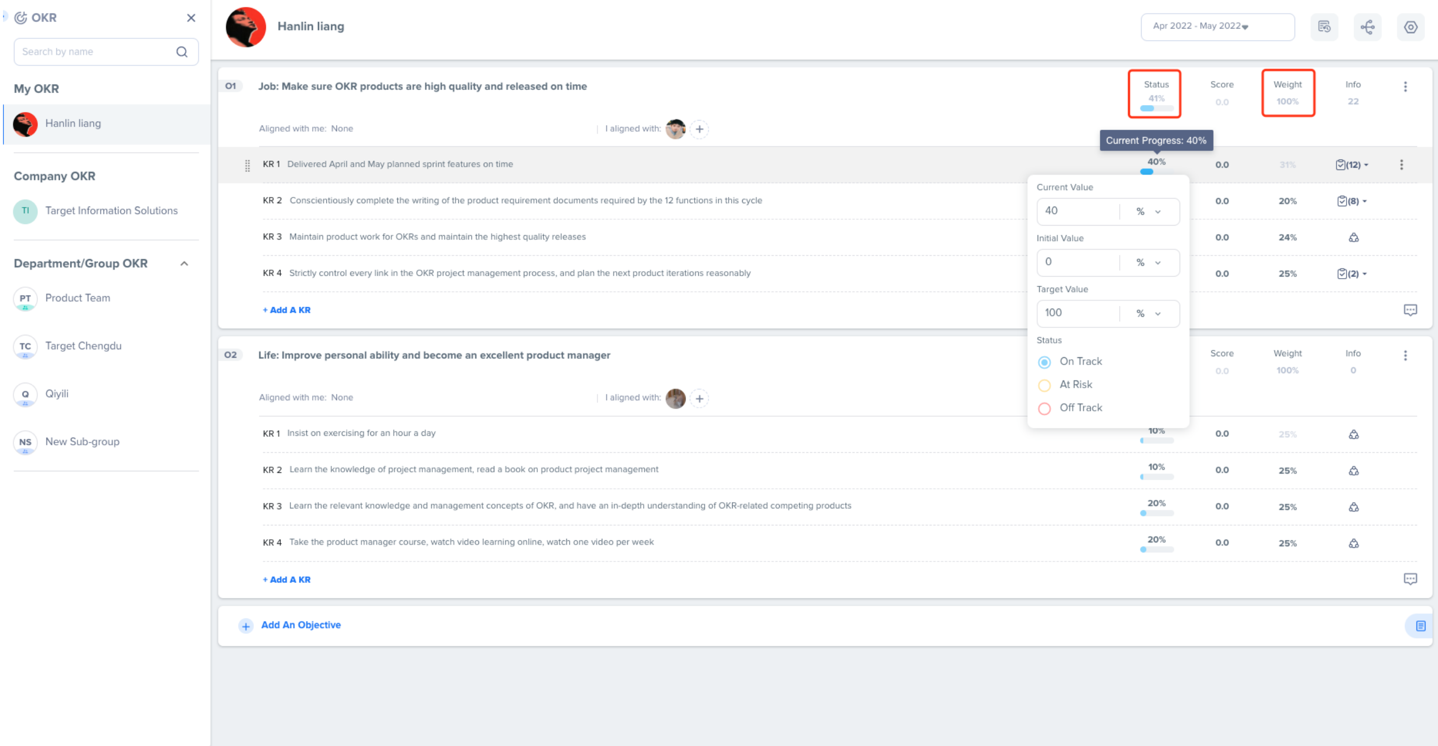
2. Click "Add Goal" to set your own goal, and click "Add KR" to fill in the key results that support the goal.



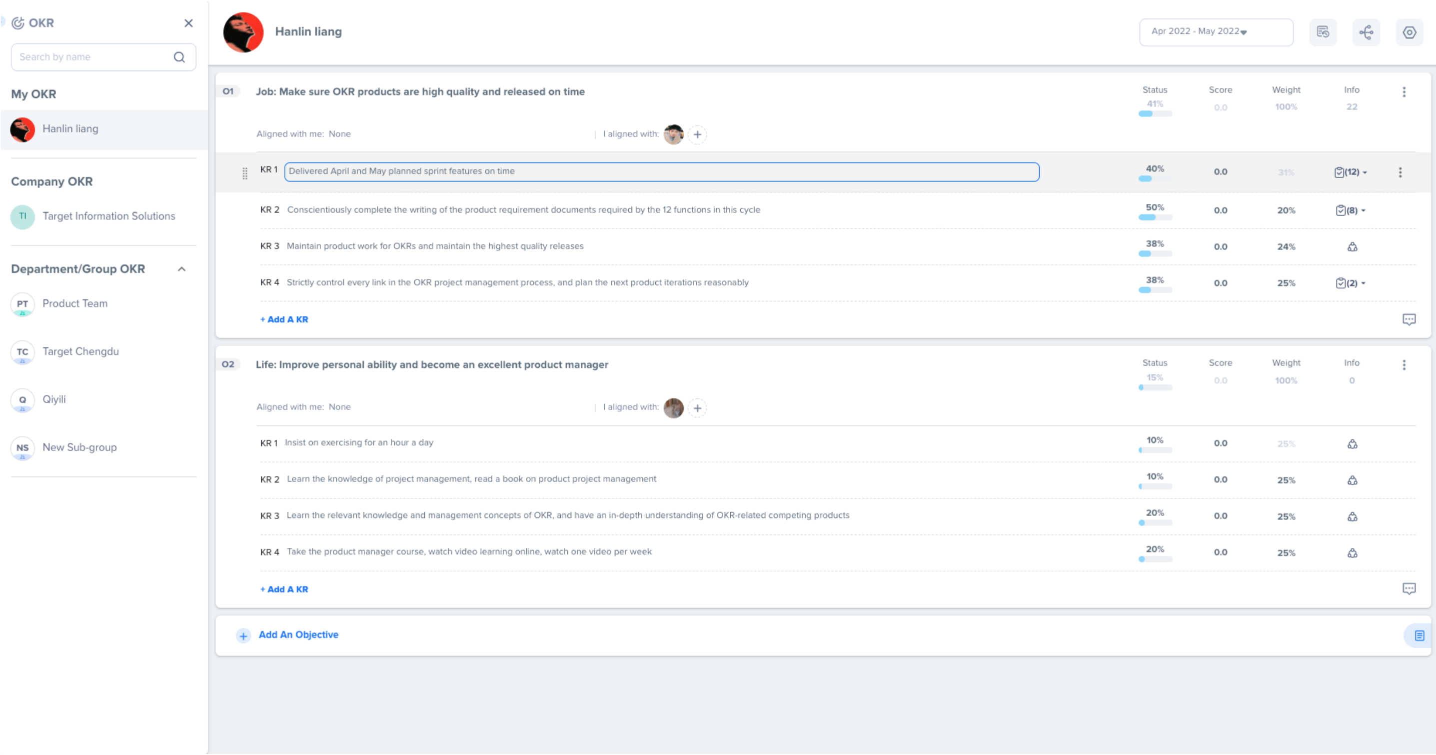
3. The number of O and KR is preferably three to five. In addition, you can adjust the order of goals and KR by dragging and dropping, which is conducive to focusing on key goals and sorting out priorities.



4. After the OKR is filled out, the weight, progress and status of each KR can be adjusted.

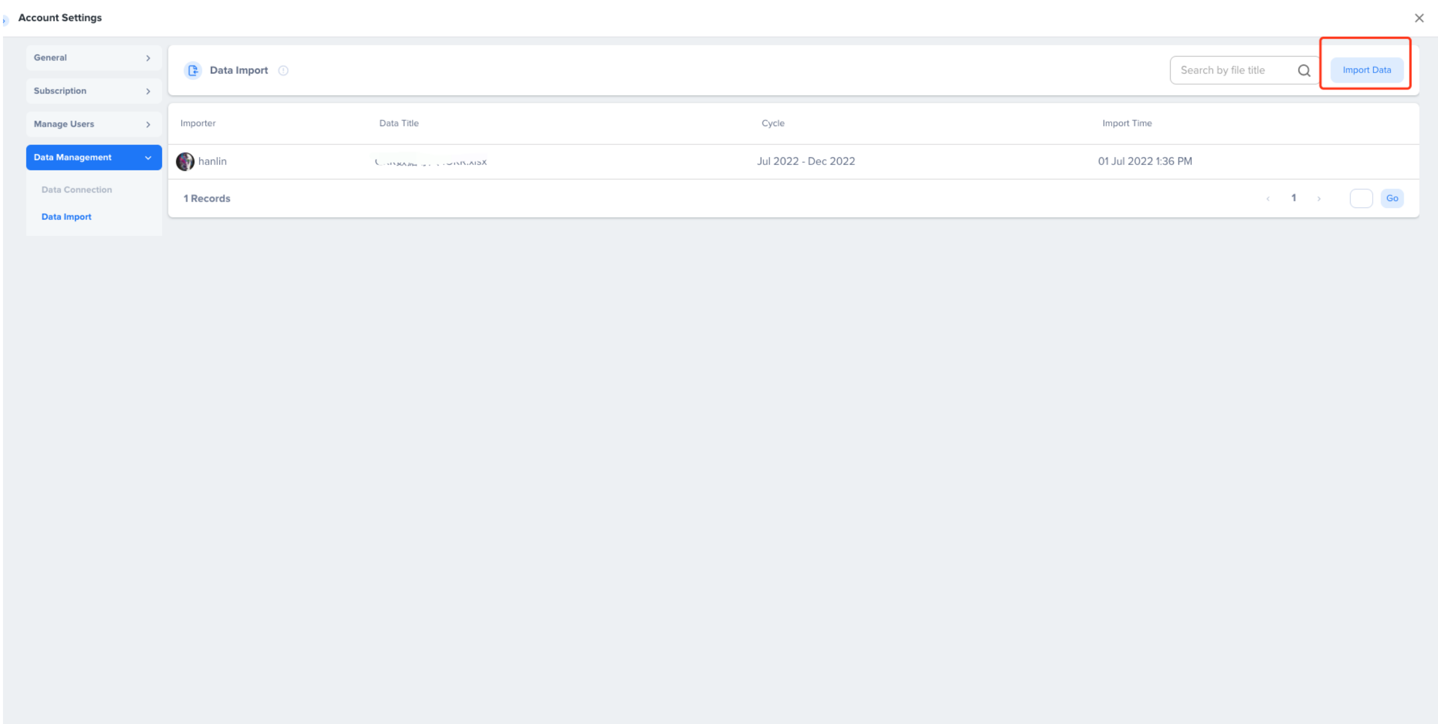


5. Edit OKR, and click "O" or "KR" to edit directly.

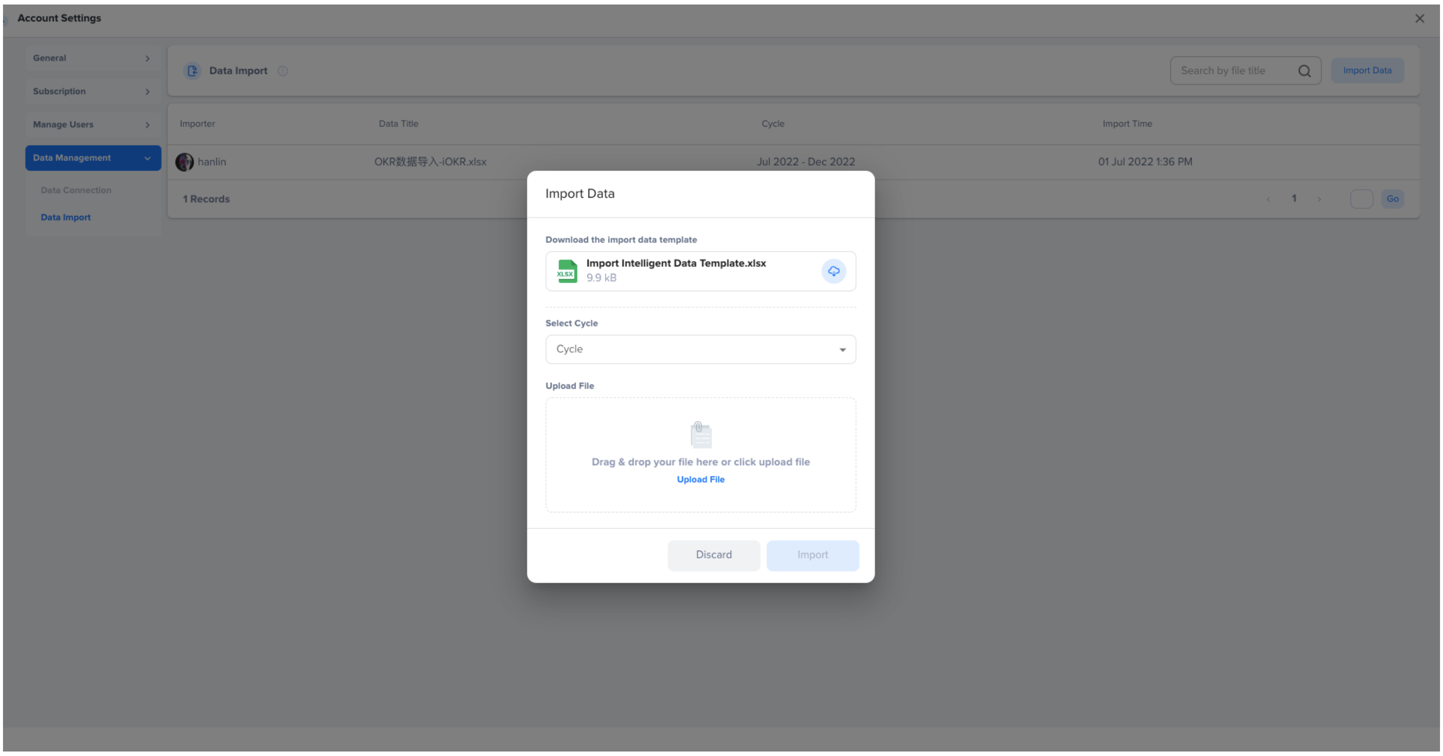


Automatically generated iOKR

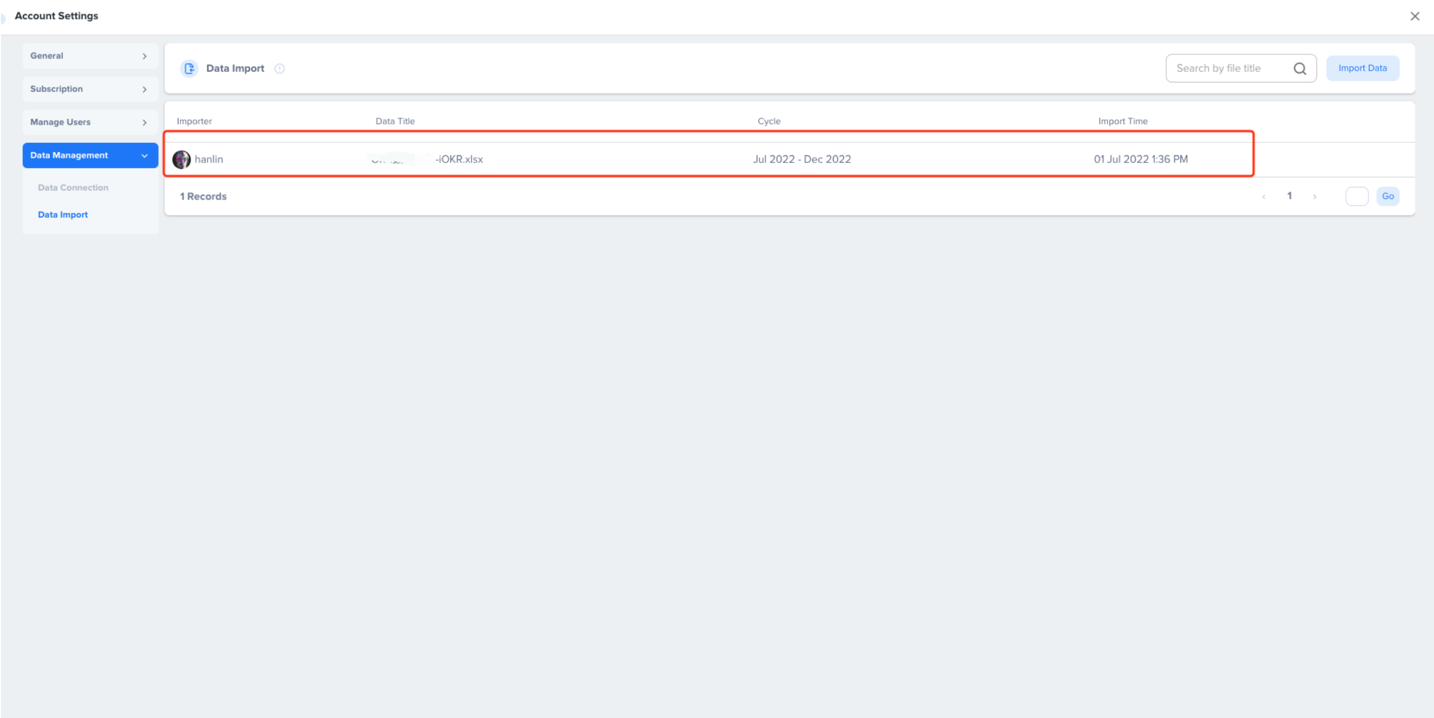
1. While supporting manual filling in OKR, it also supports importing data to generate iOKR automatically. The administrator clicks "Import Data" in Settings - Data Management - Data Import.



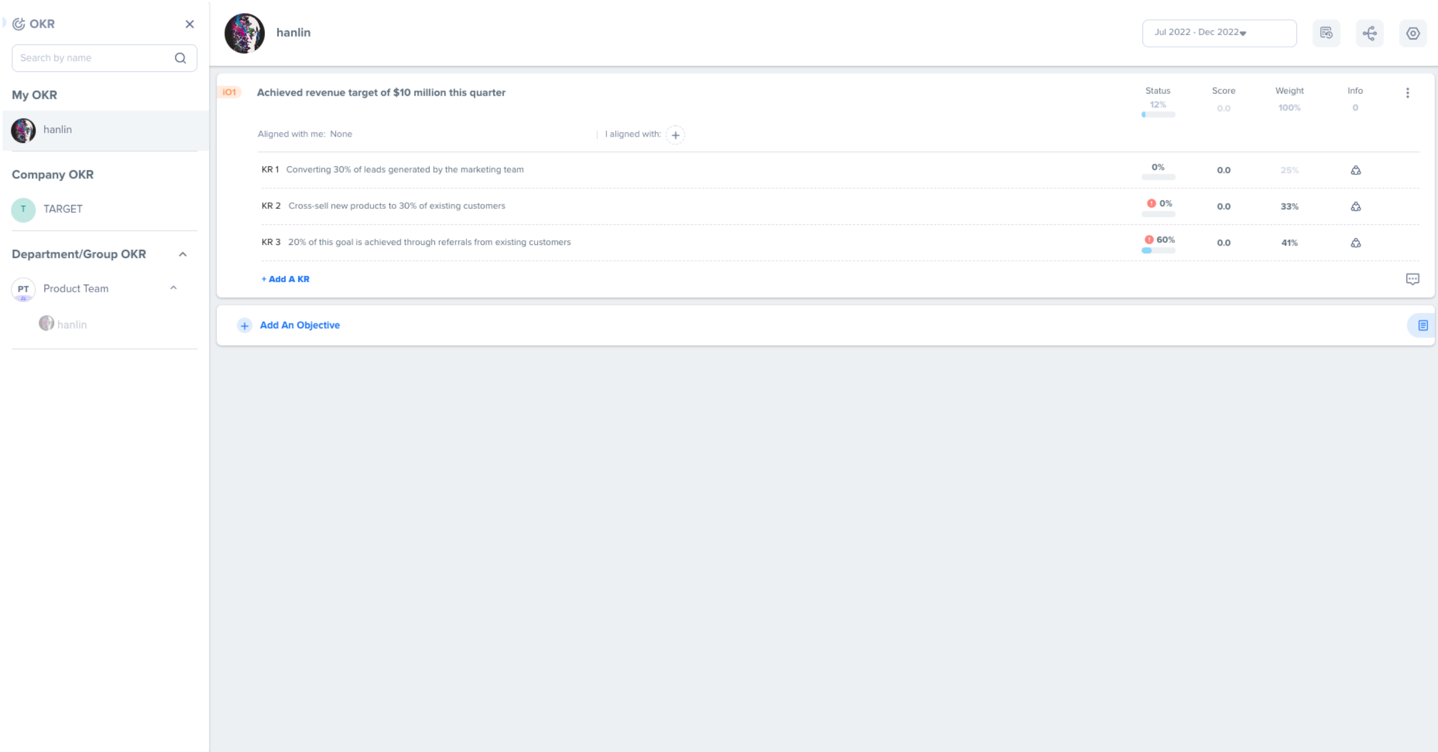
2. Download the template for importing data, fill in the data according to the template format and requirements, select the cycle to be imported into, and upload the file.



3. After the file is uploaded, the successfully imported data information will be recorded in the "Data Import" page.

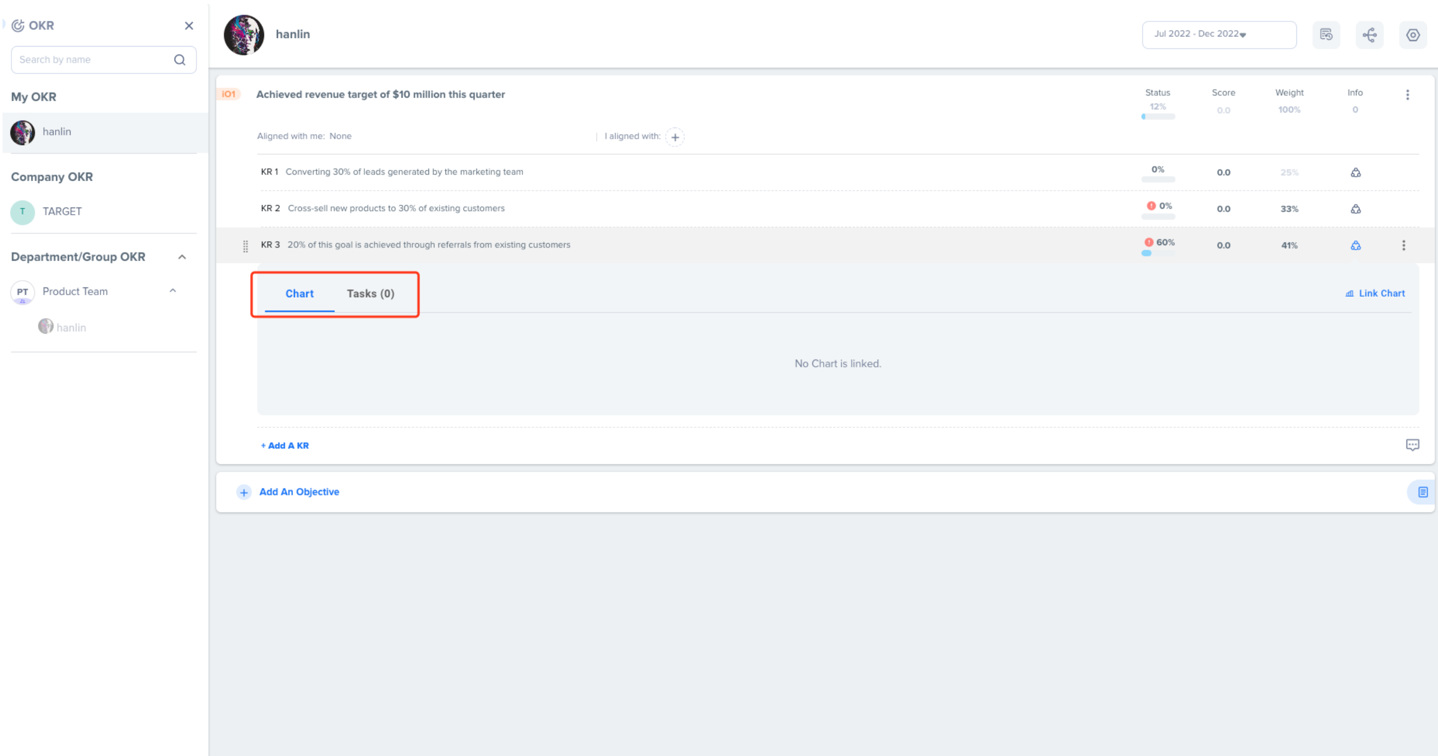


4. After the data is imported, the user can see the iOKR automatically generated based on the imported data on the OKR homepage.



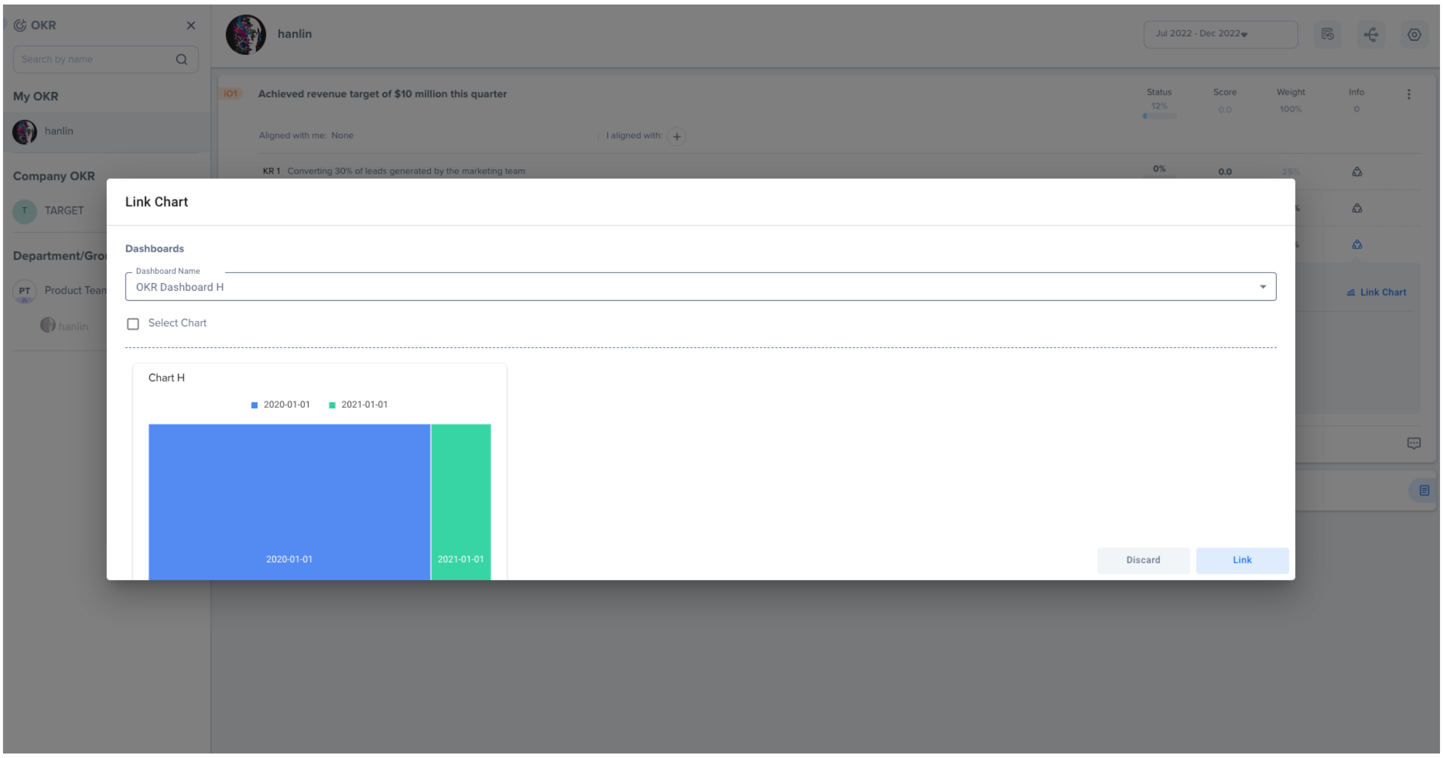
Related information

1. The “info” on the OKR homepage includes two parts: "chart" and "task", which support linking related chart data and specific tasks in KR.

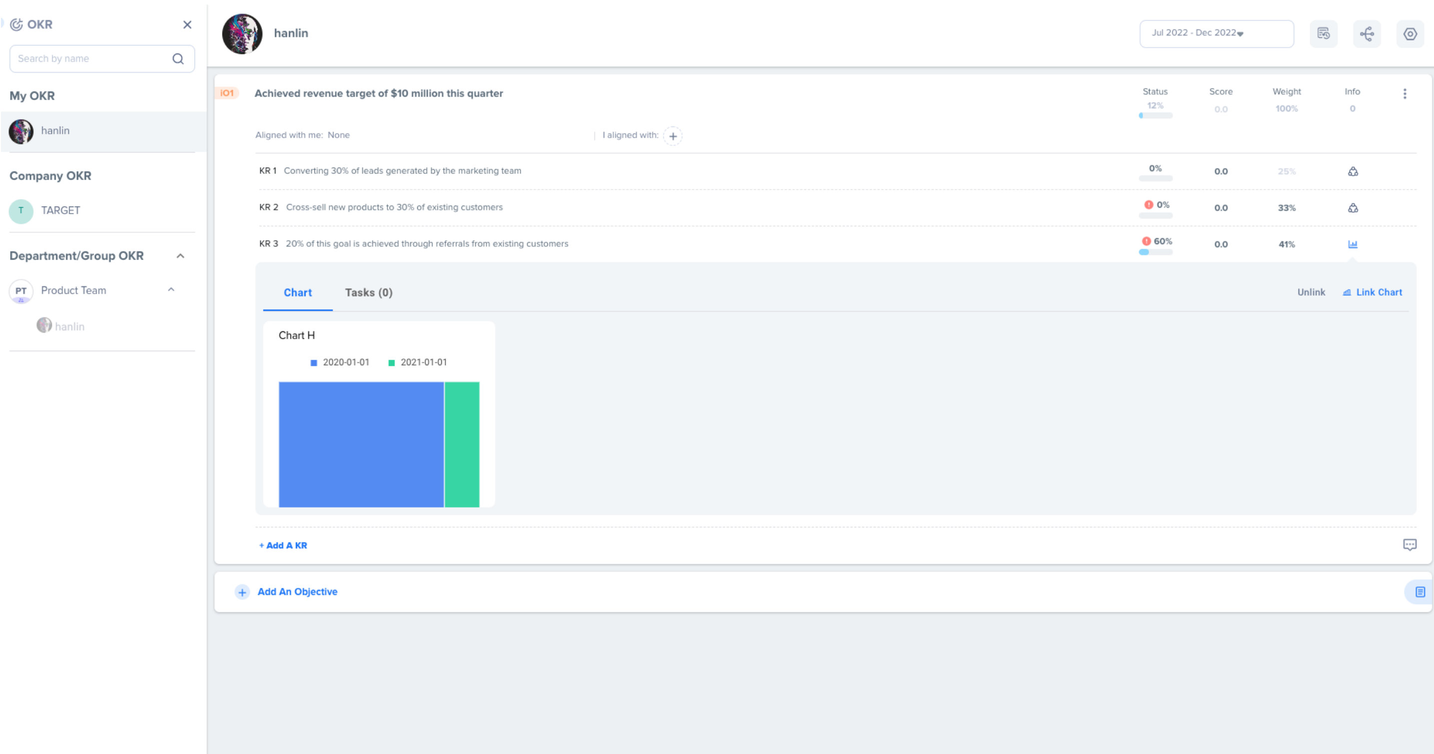


2. Link chart

Click “Link Charts” and select the “Dashboard” or “Chart” to link.

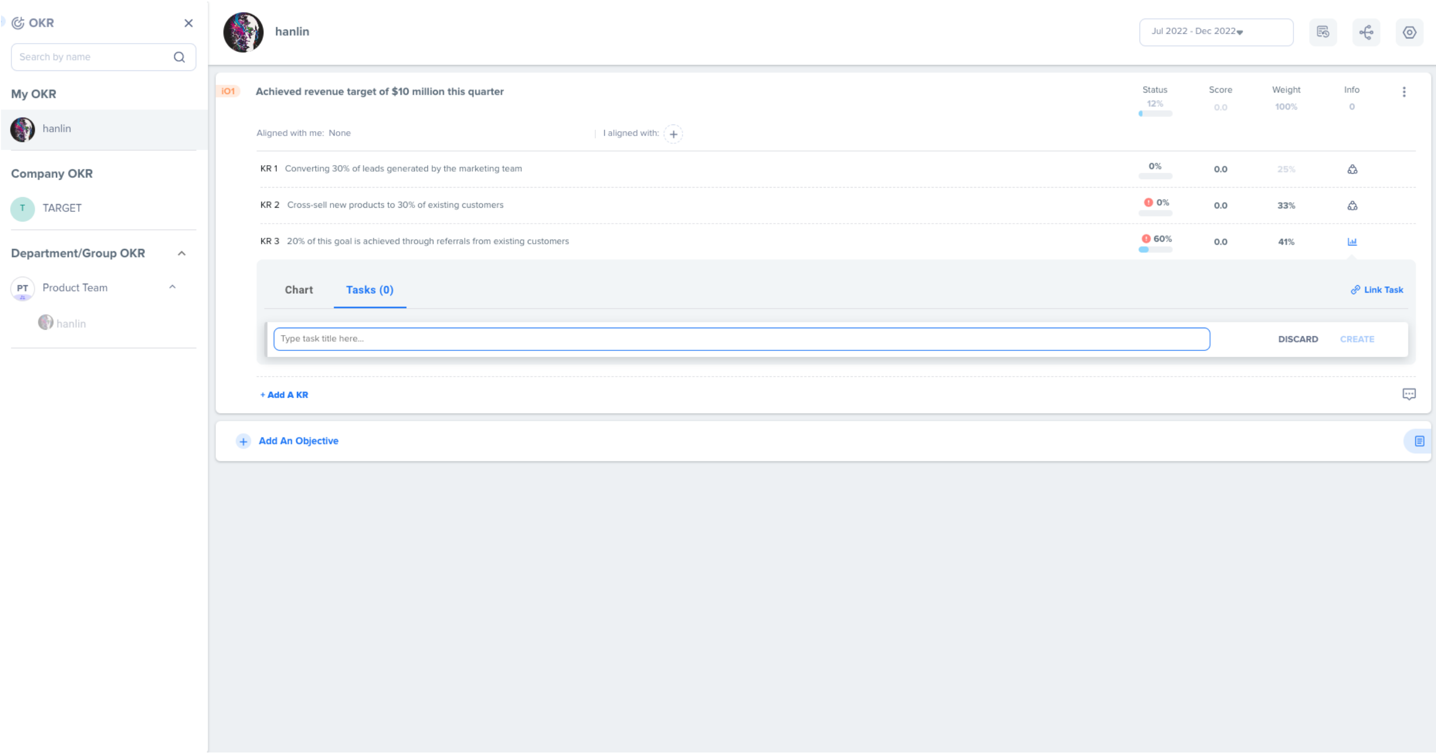


3. After the chart link is completed, you can see the chart details in "link Information". Let each O and KR have corresponding data support.



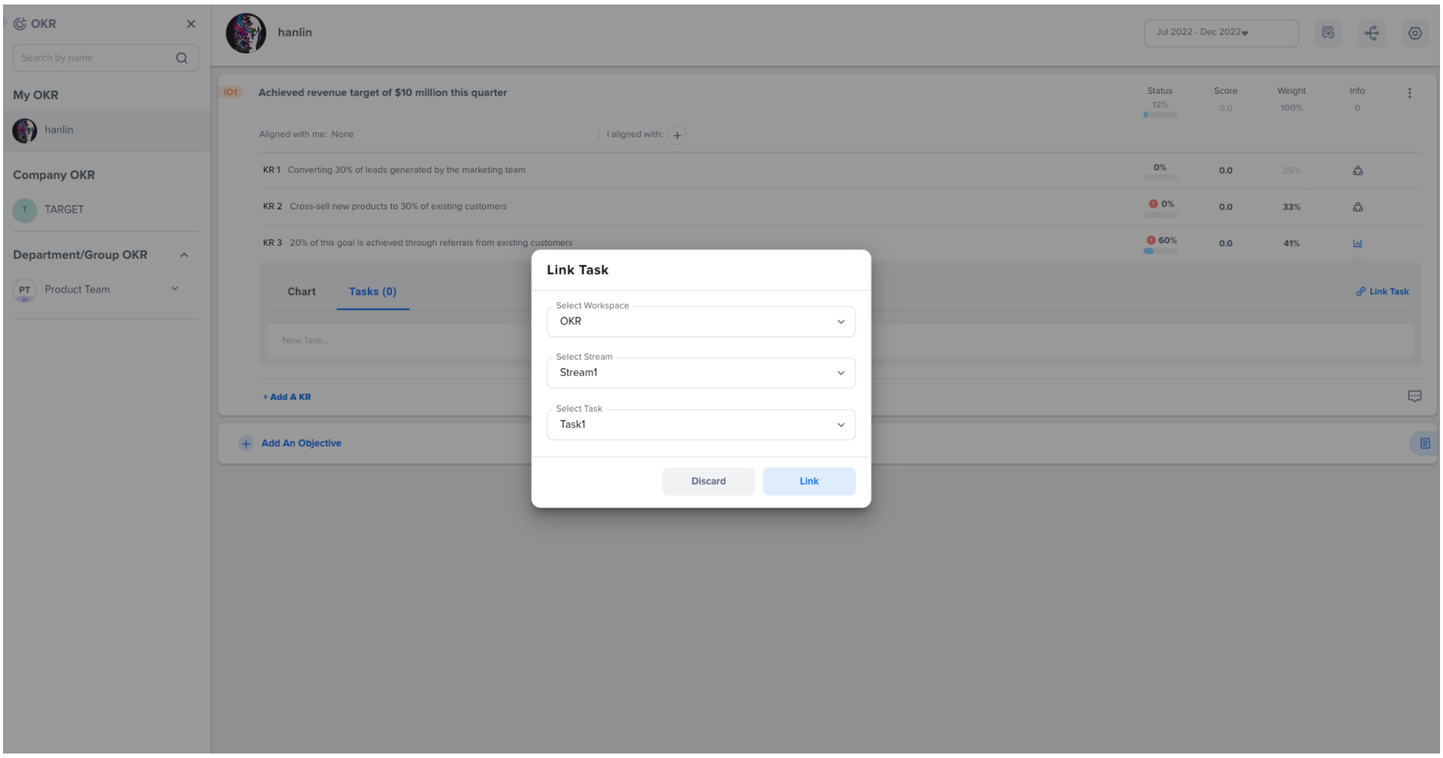
4. Create task

Create tasks are supported in the task list, click "New Task" to create a task directly.

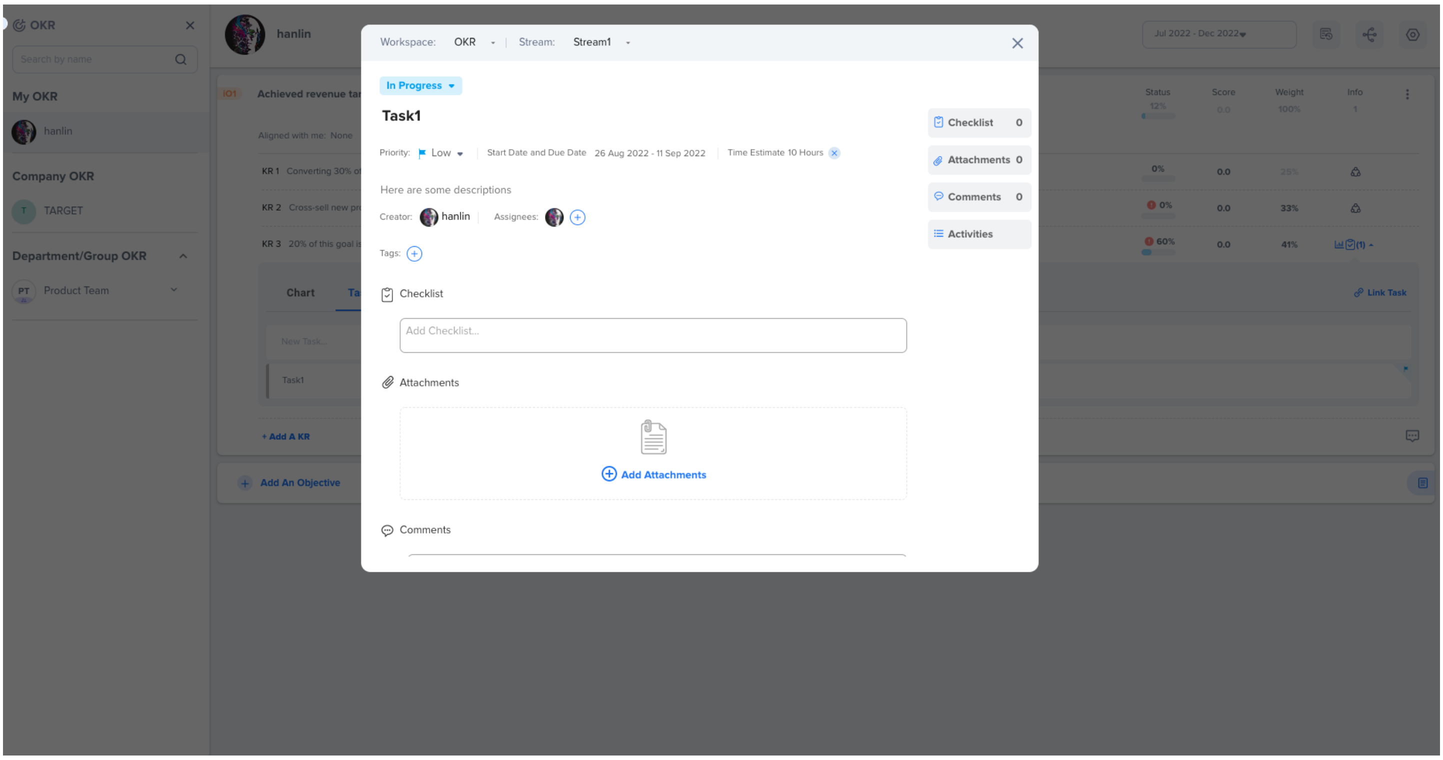


5. Link task

KR can be linked with tasks in the workspace module, click "Link Tasks" - select workspace, columns and tasks to link.

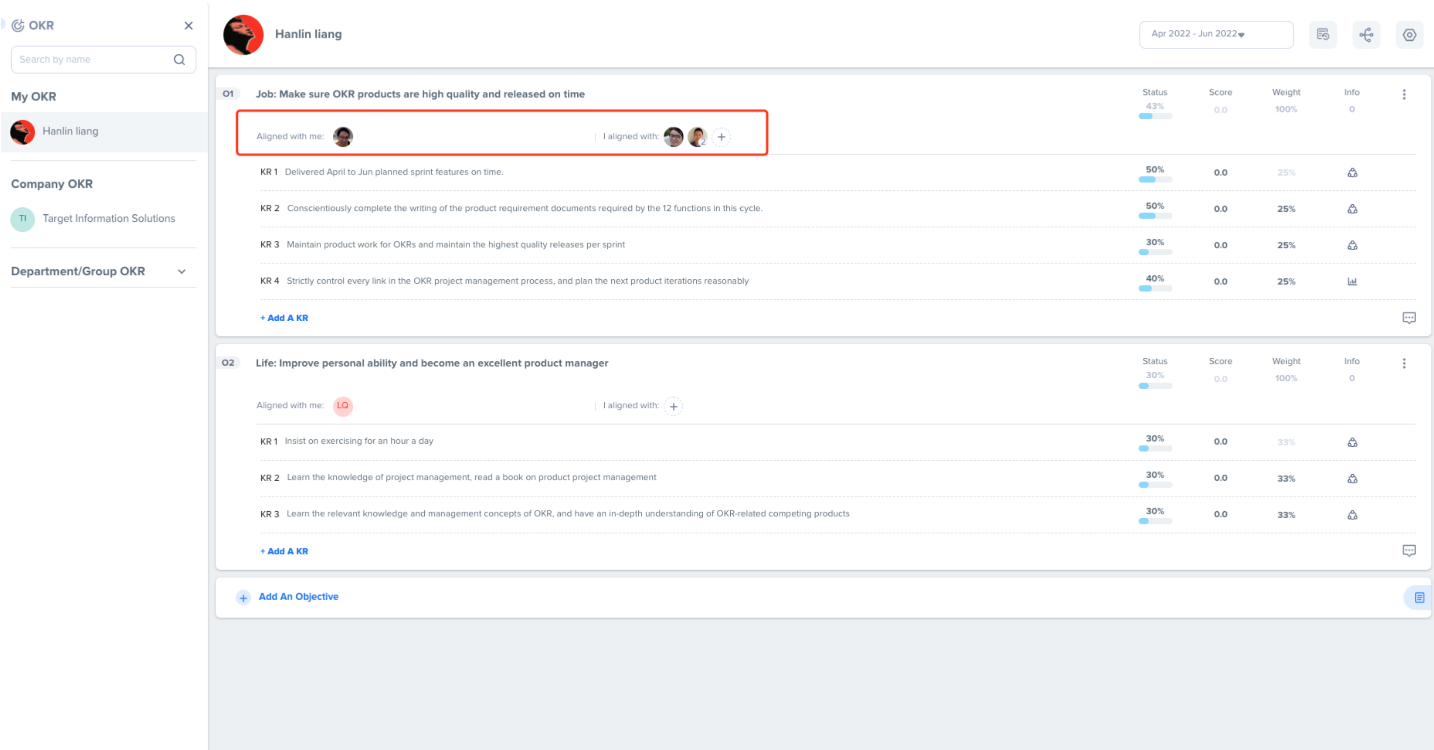


6. After the tasks are linked, they will be arranged under KR in order. Click to view the task details.

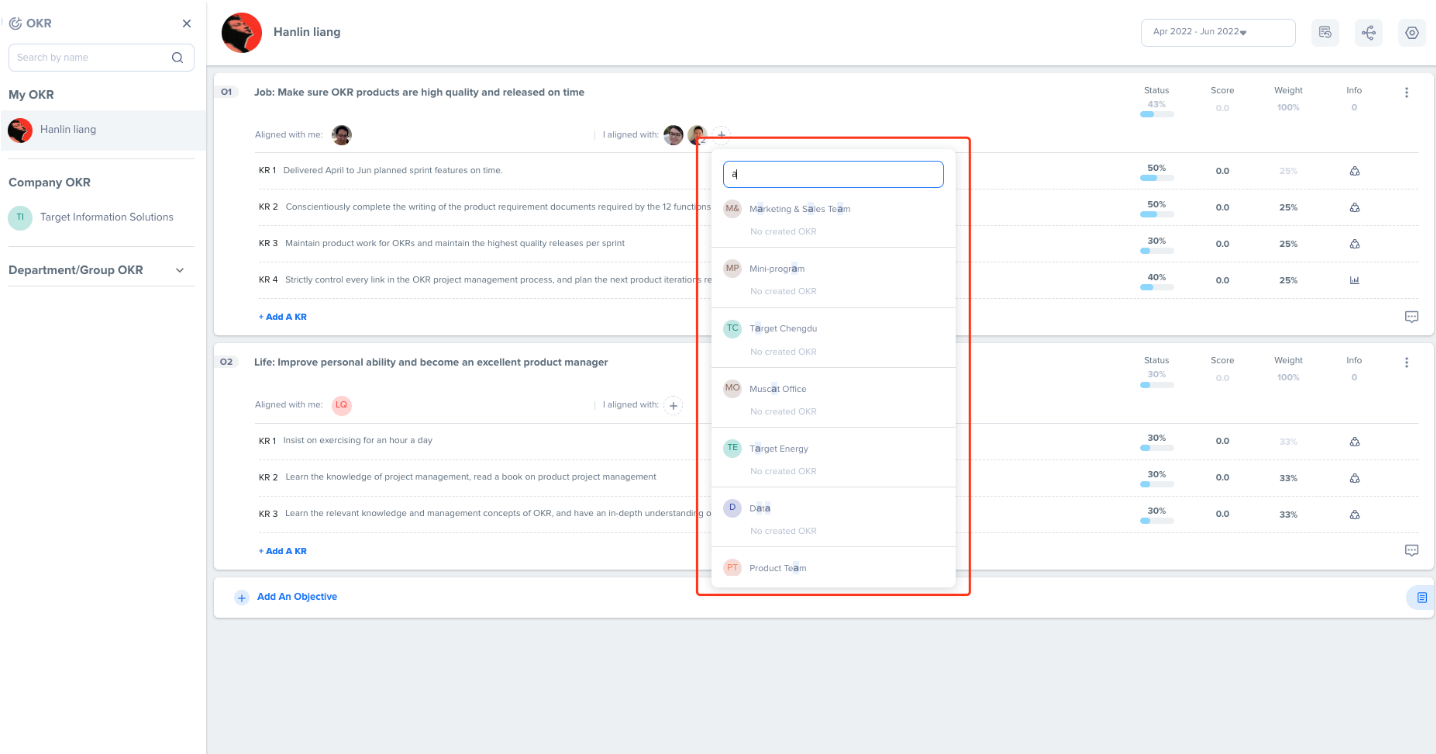


Alignment

1. After the OKR is filled out, who is aligned with me and the specific situation of who I am with on the OKR homepage.

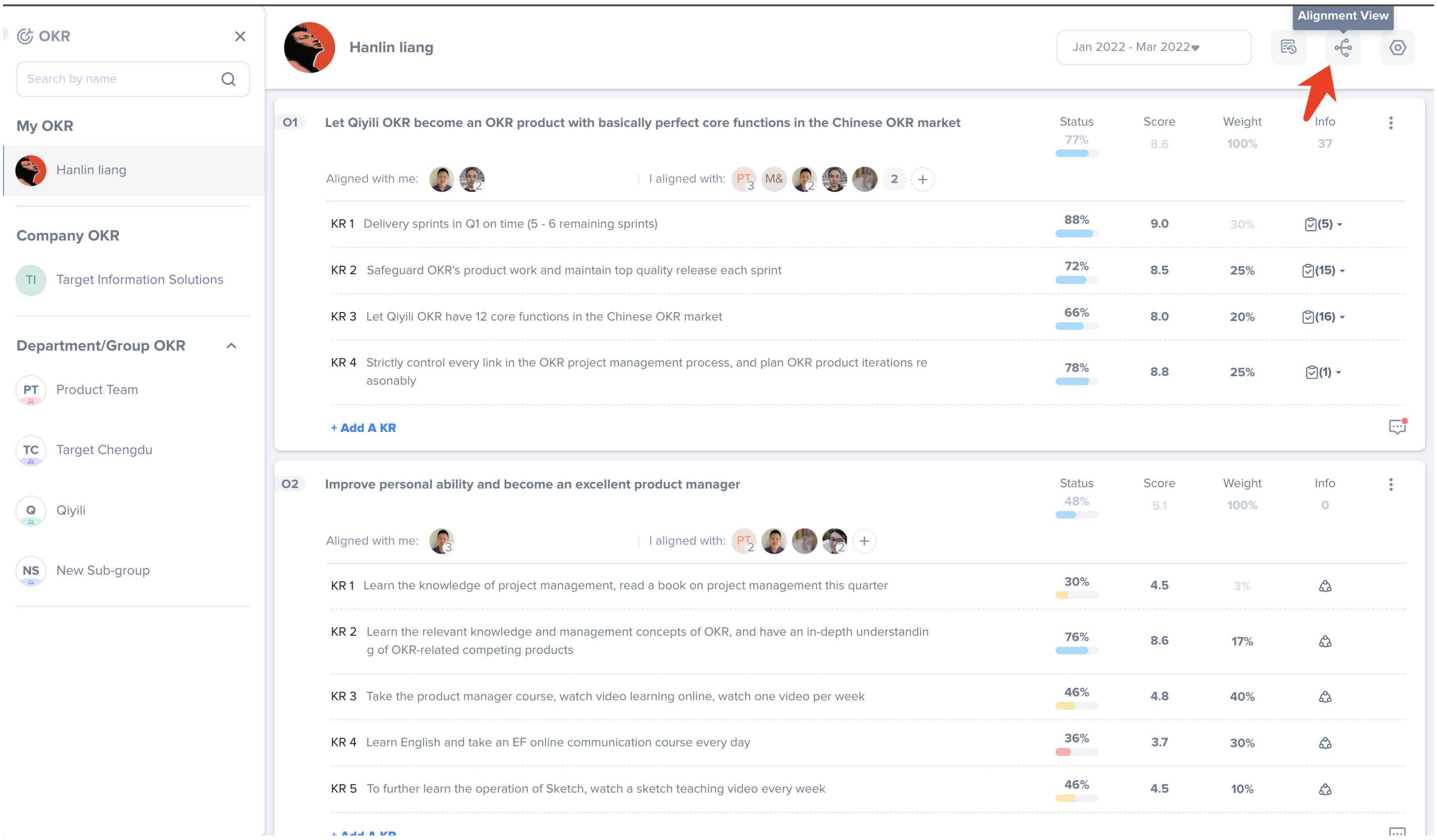


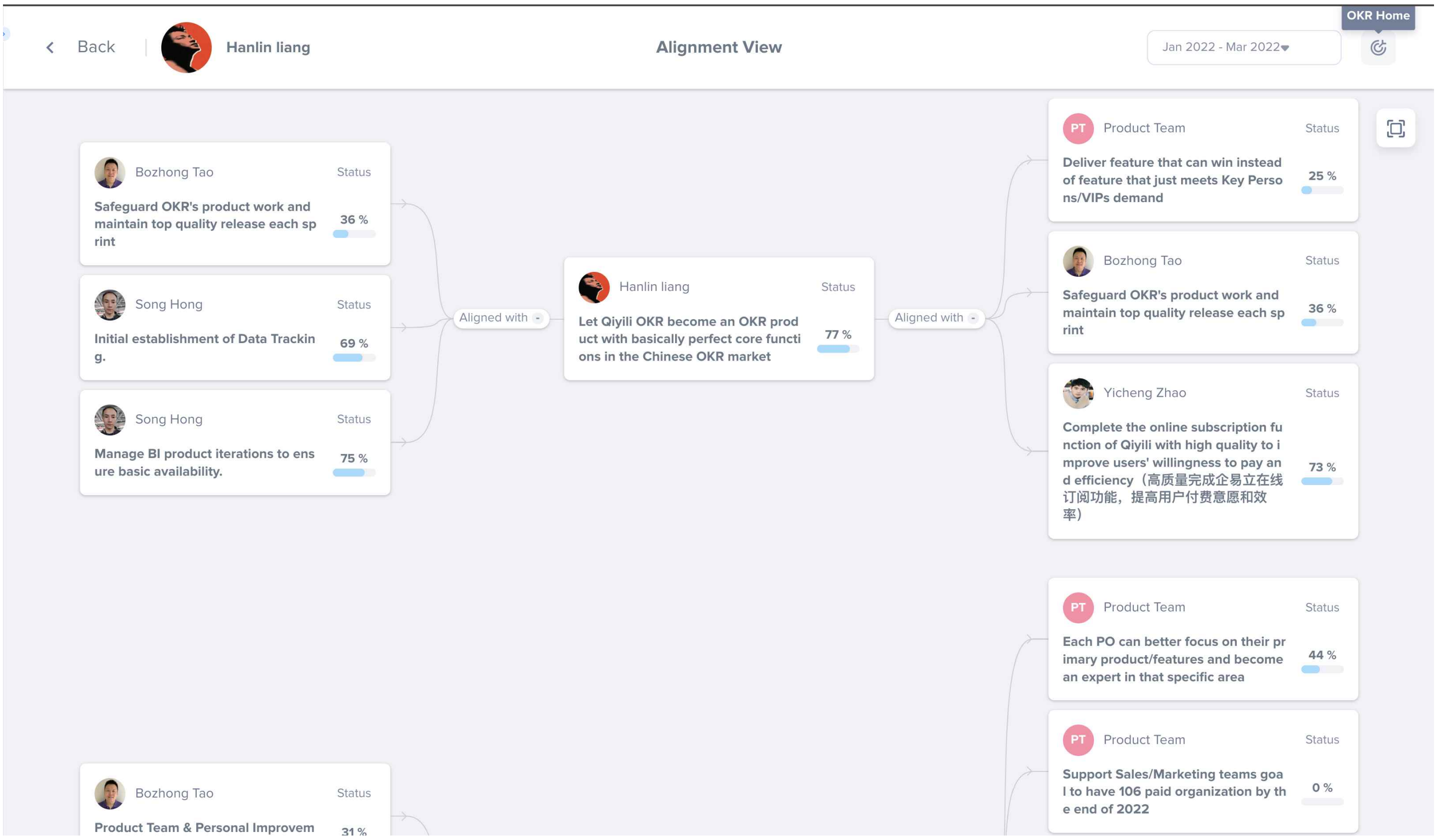
2. Click the "Add Alignment" button to search for the goals of other departments and users, and click the goals to directly align with them.



3. Align view

After adding the alignment, click "Align View" . In the alignment view, you can see the overall situation of my target alignment.



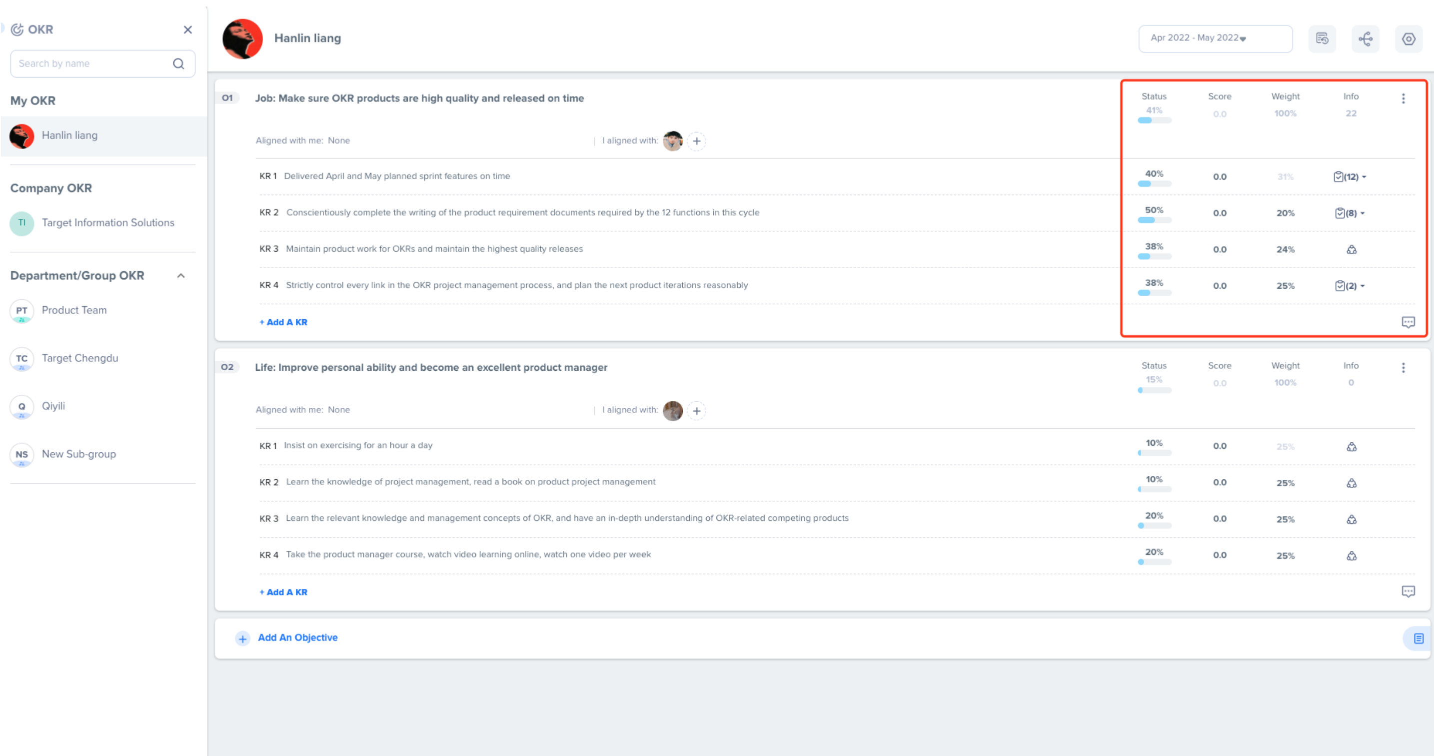


Follow up OKR

It requires adjusting OKR and keeping following up OKR in OKR follow-up stage. You can leave corresponding comments in the user's OKR when following up.

Adjust OKR

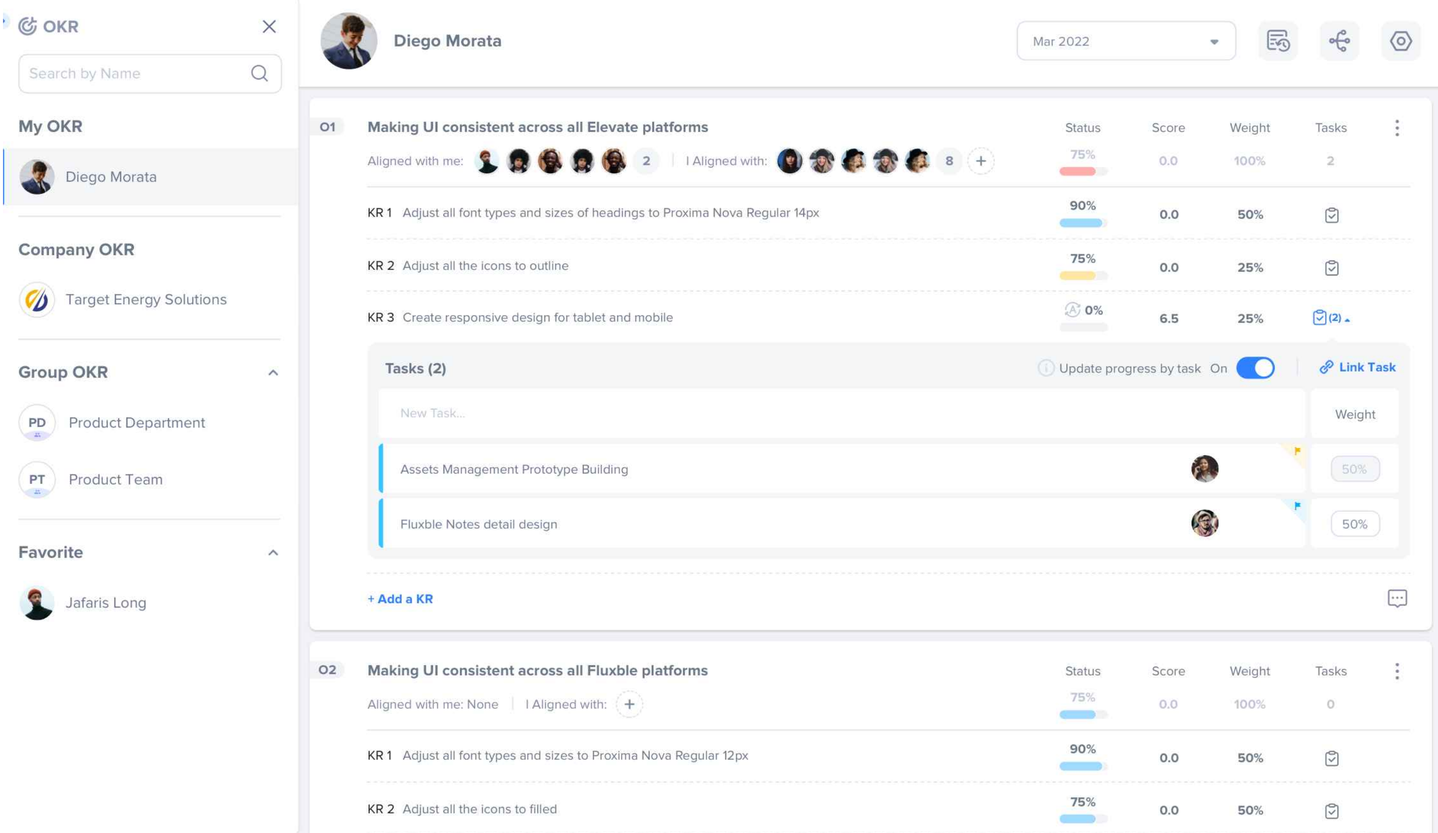
Manually adjust the content, status, weight, and related information of OKR.



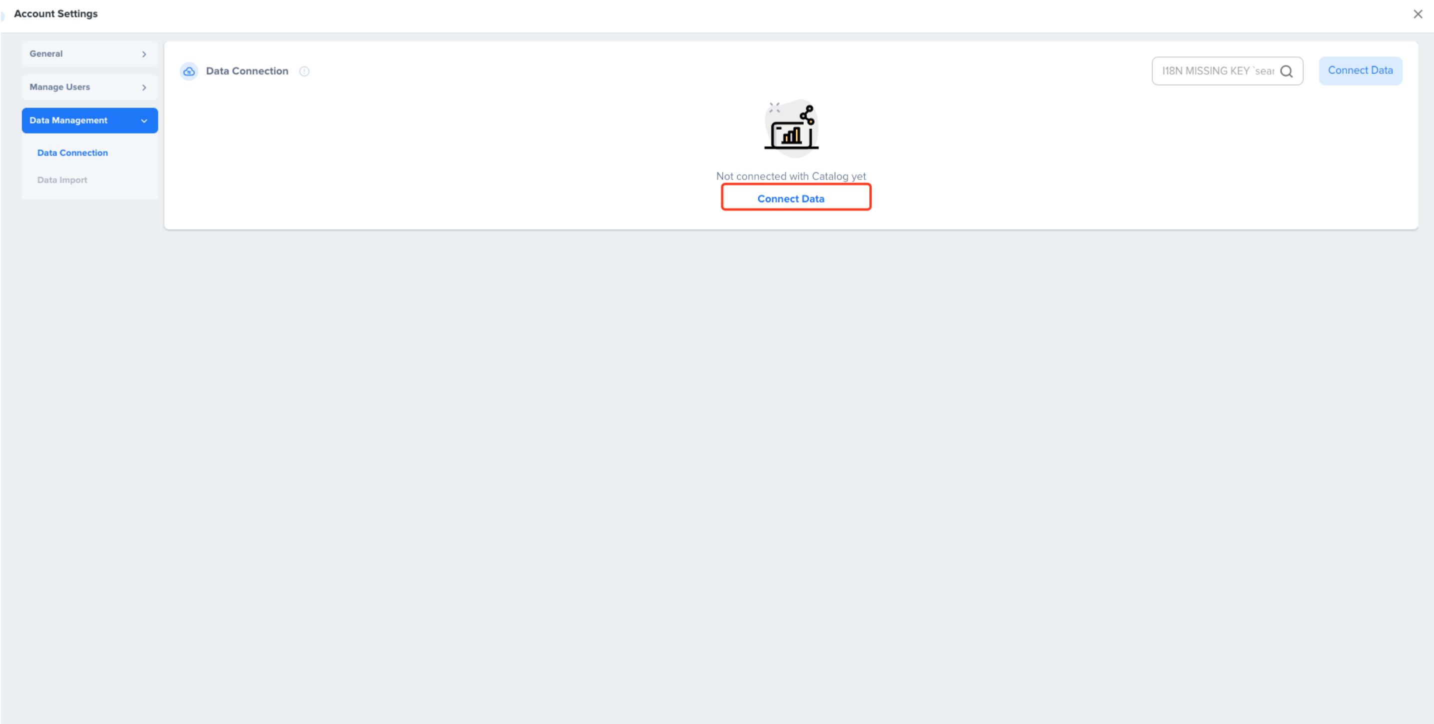
Automatically update progress

1. KR progress can update automatically based on tasks.

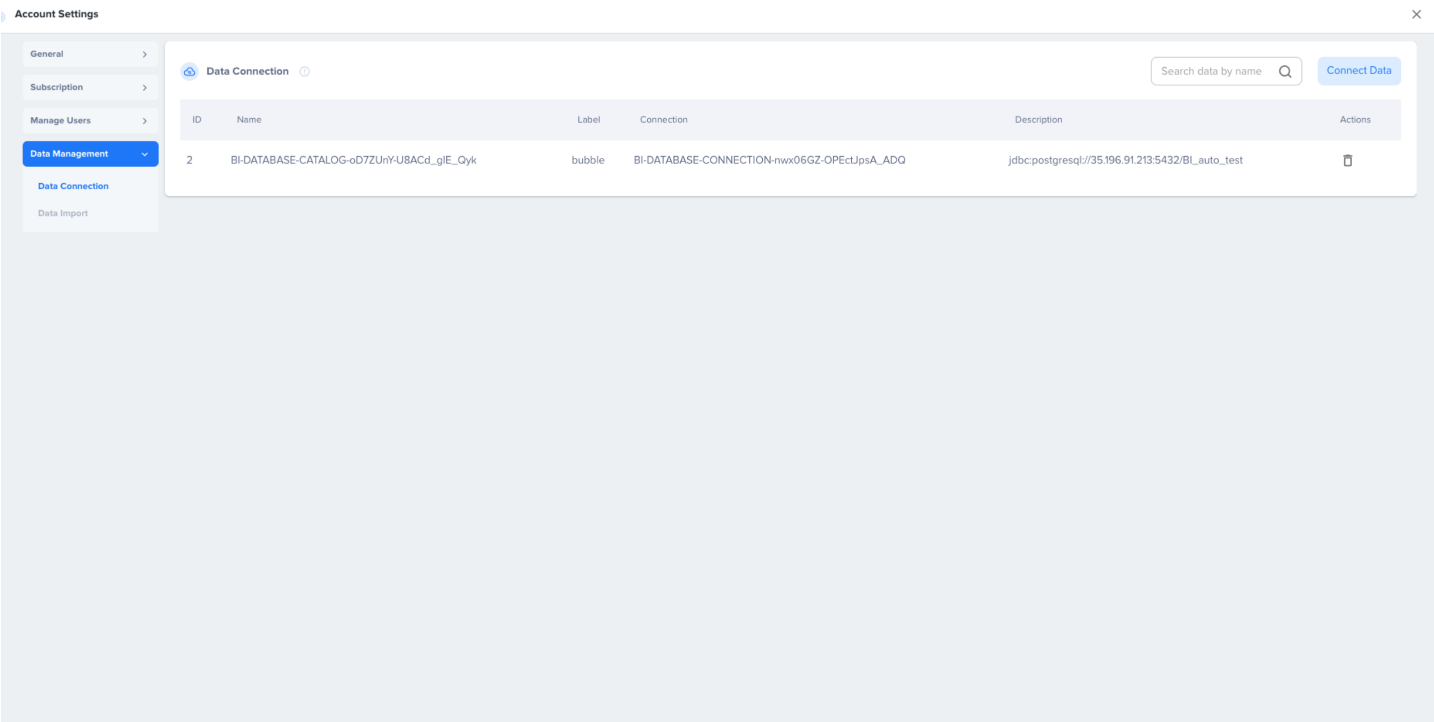
The user can turn on auto-update switch in the tasks list of KR. After the switch is turned on, the user can define the weight of each task based on its importance. Then the KR progress and current value will update automatically according to the weight and complete status of the task. After the "Update progress by task" switch is turned on, the current value, initial value and target value will not support manual editing anymore.



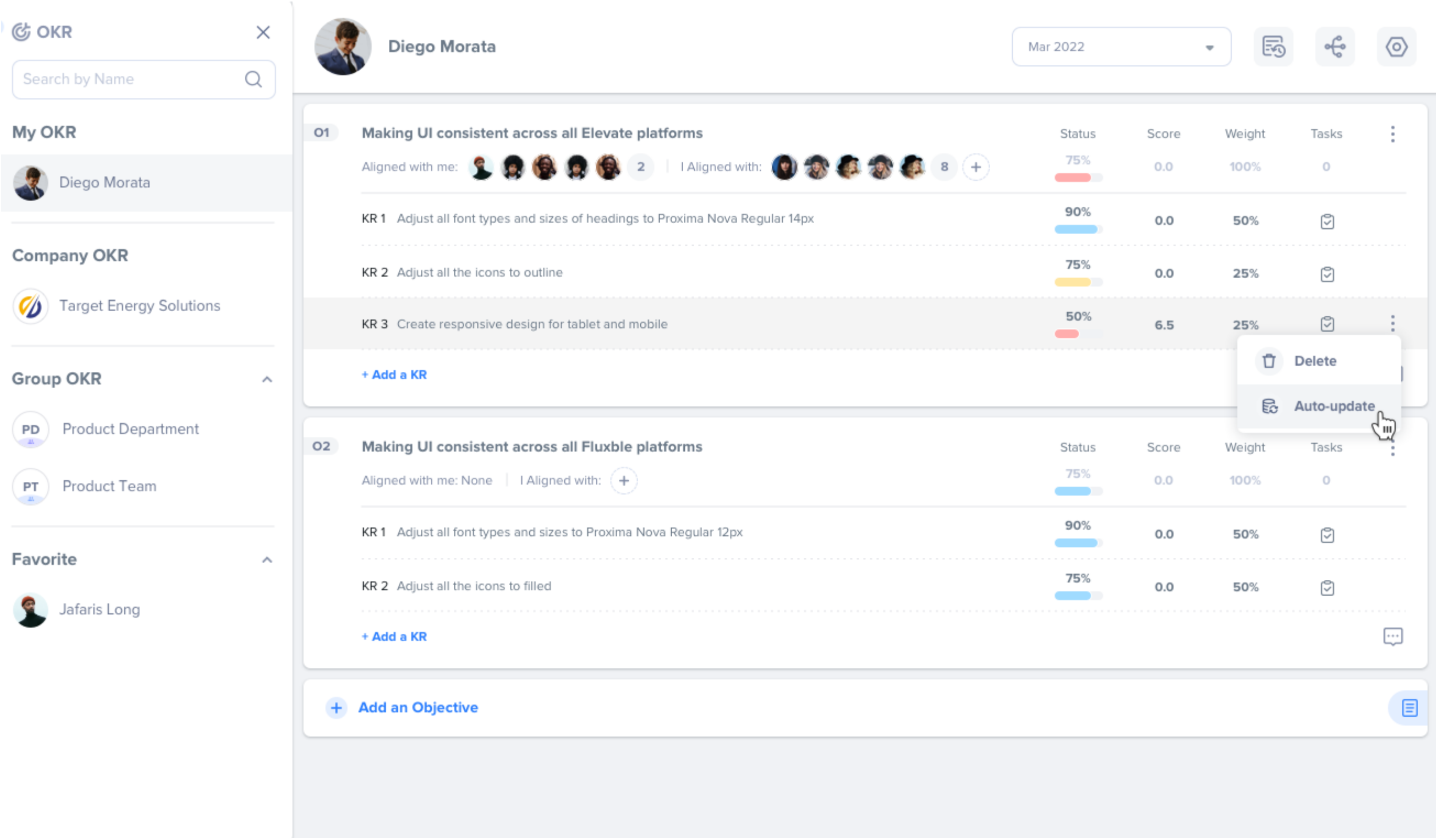
2. KR progress updates automatically based on data. Manager connects data of the enterprise in Account Settings - Data Management - Data Connection page.



3. After you type in "catalog" label, you can select "catalog" to connect. After the data is connected successfully, the details of the successfully connected data will be recorded on the "Data Connection" page.

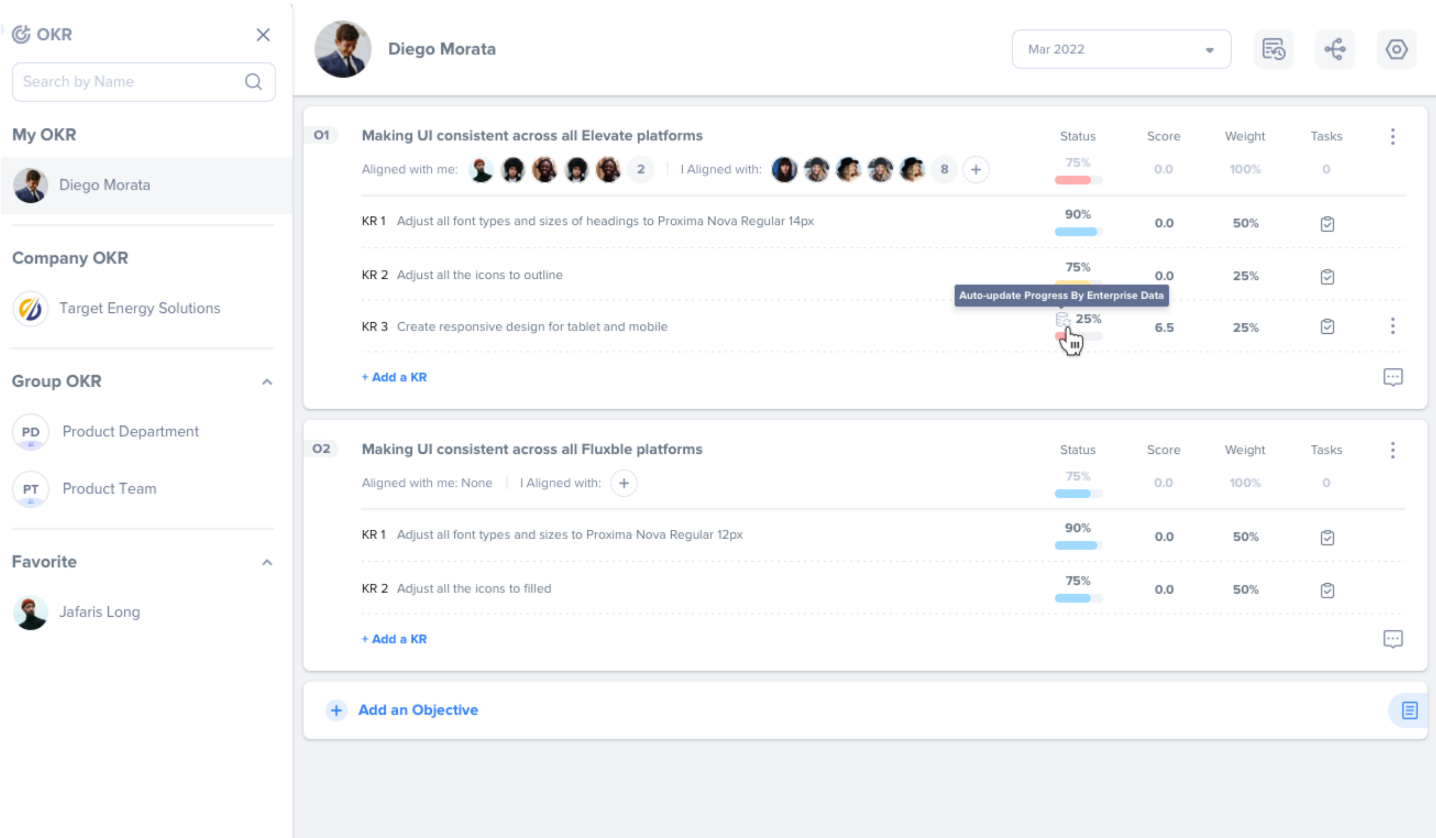


4. After the data is connected, the user can use KR progress "auto-update" feature on the OKR home page



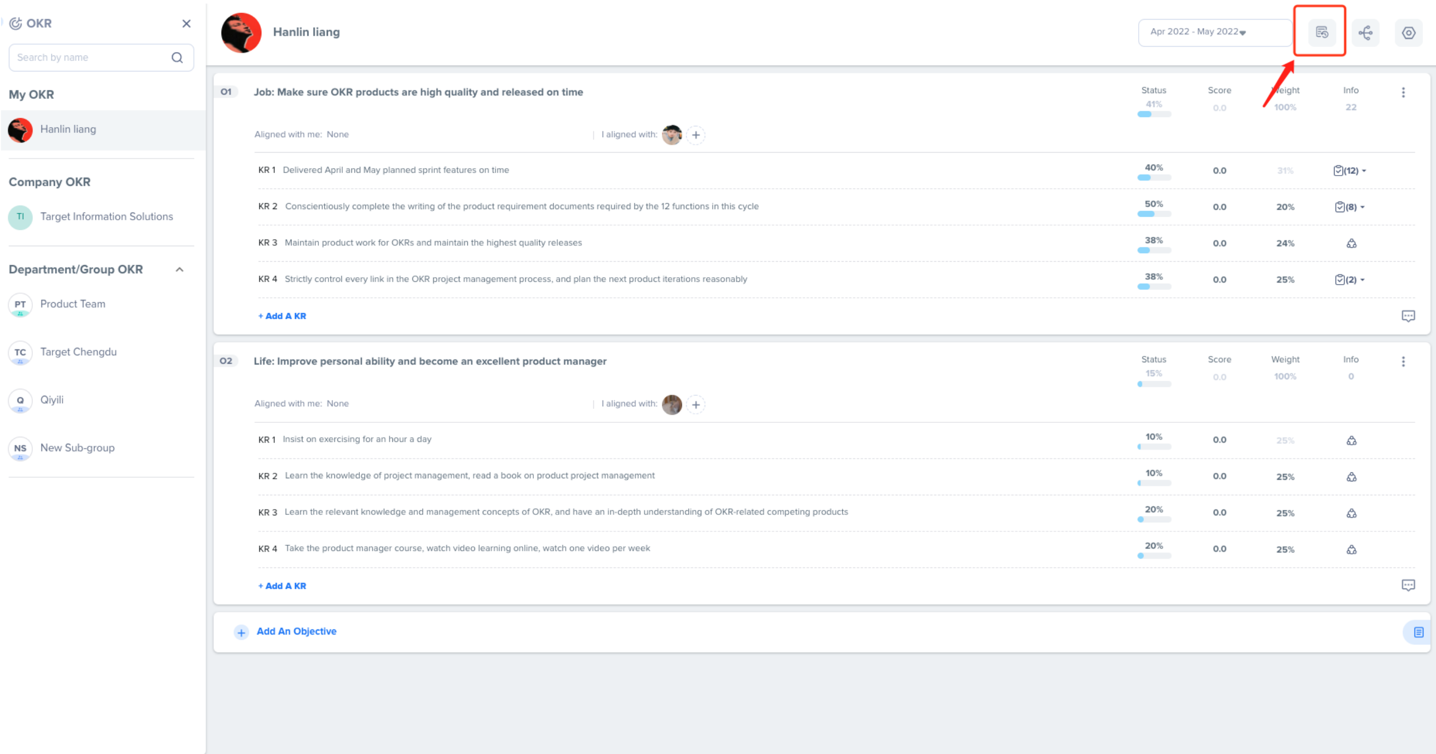
5. After typing in the correct "query criteria", you can turn on the auto-update function.

After the auto-update function is turned on, the current value and current progress of KR will auto-update according to data; And you can view auto-updating KR based on data in status.

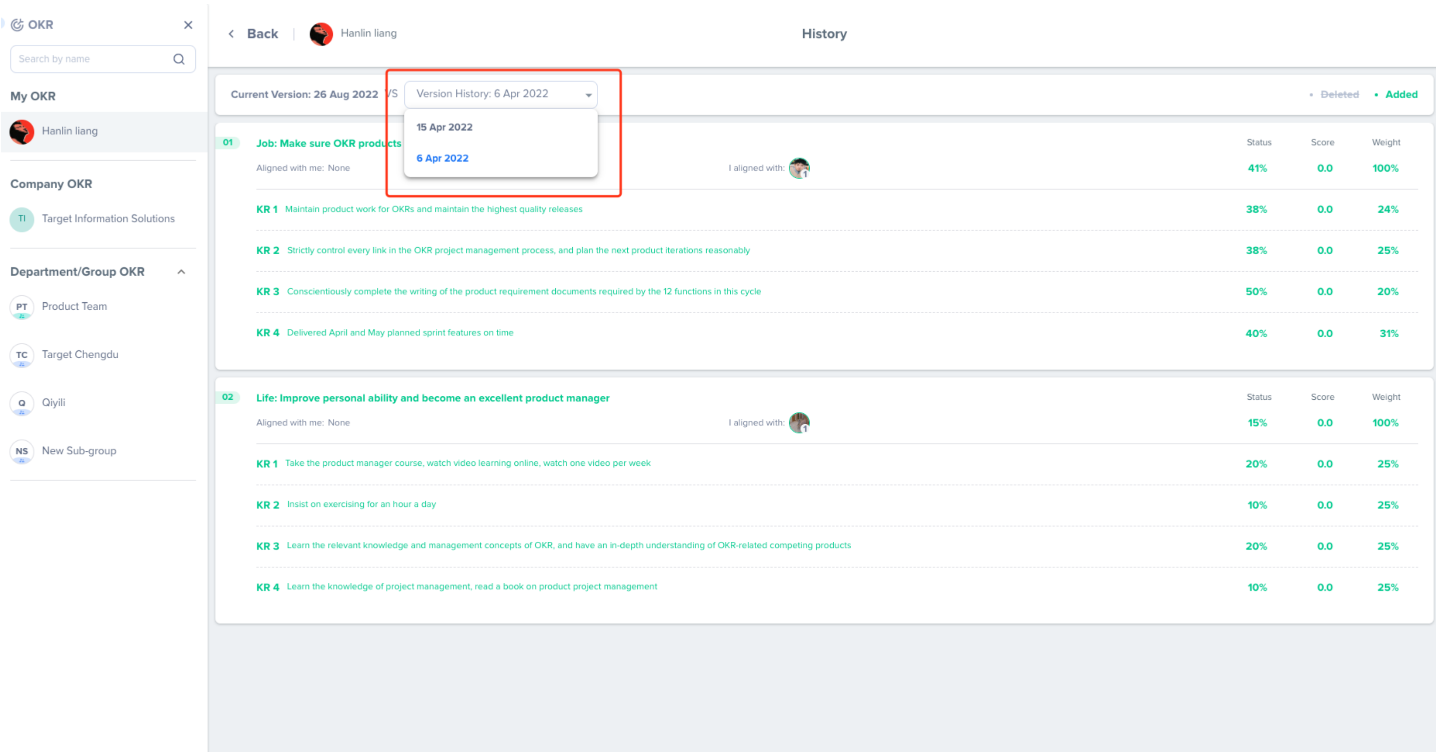


History record

1. Click the "History" button, you will enter the history record page.

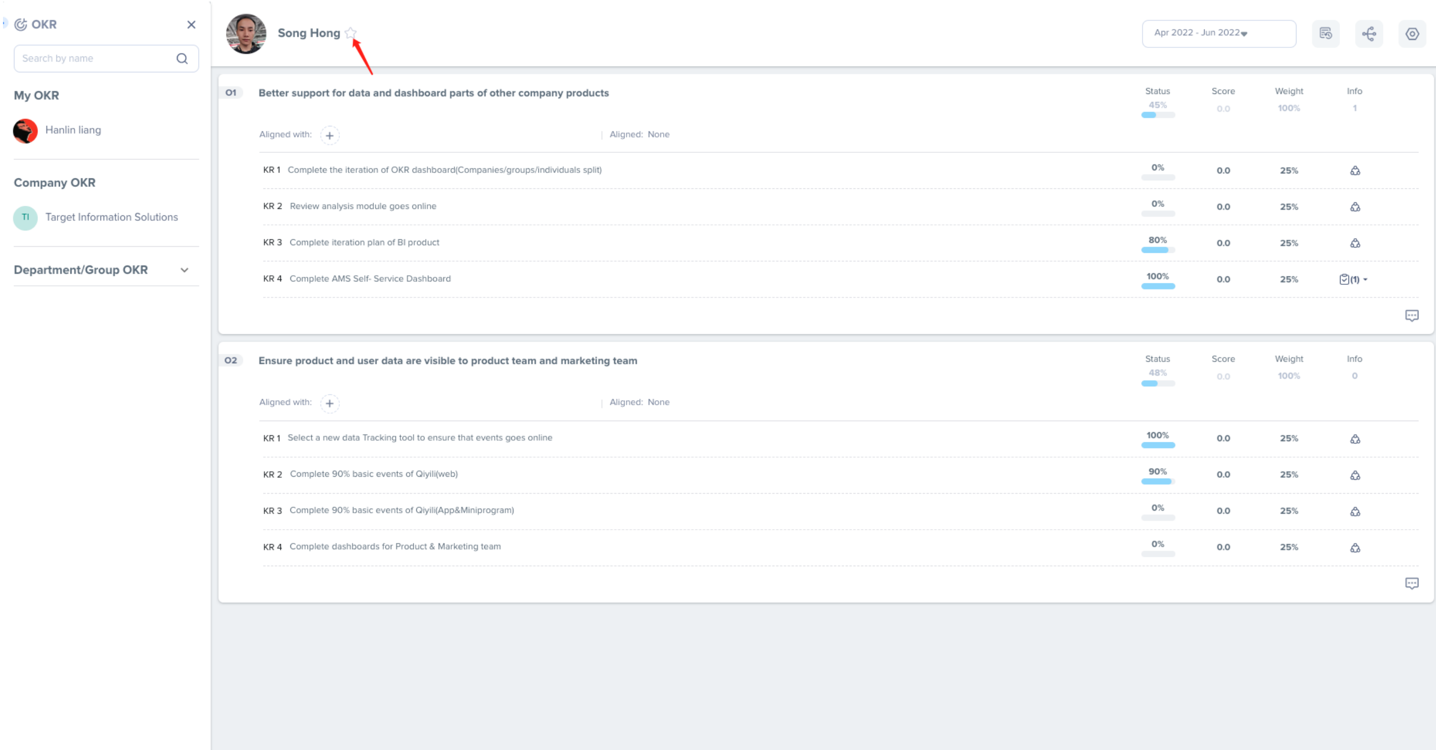


2. By switching "Version History", you can view the detailed editing and revising state of each version of OKR.

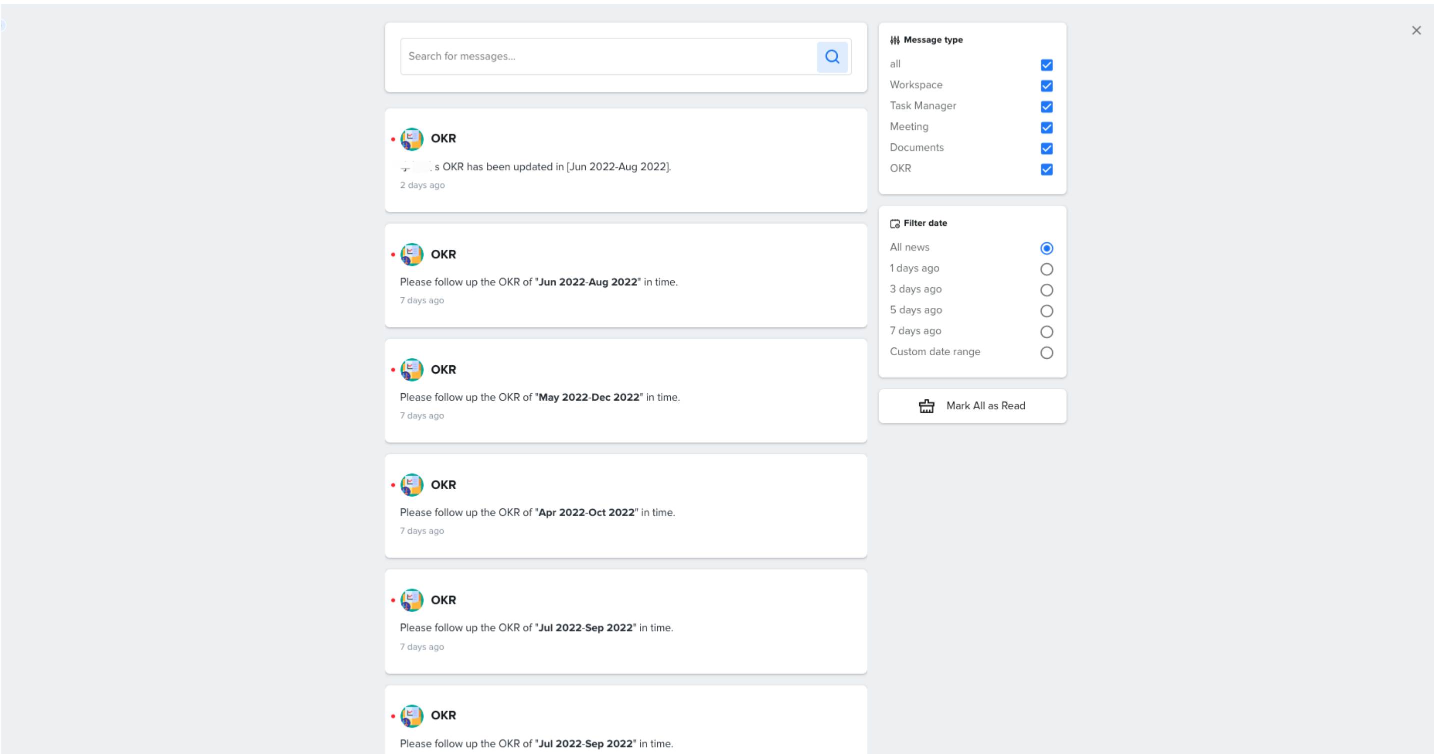


Follow the OKR of someone or some department

1. The user can enter a department's or a member's OKR home page, and click the "follow" icon. Then the member or the department will appear in the "Following" list.

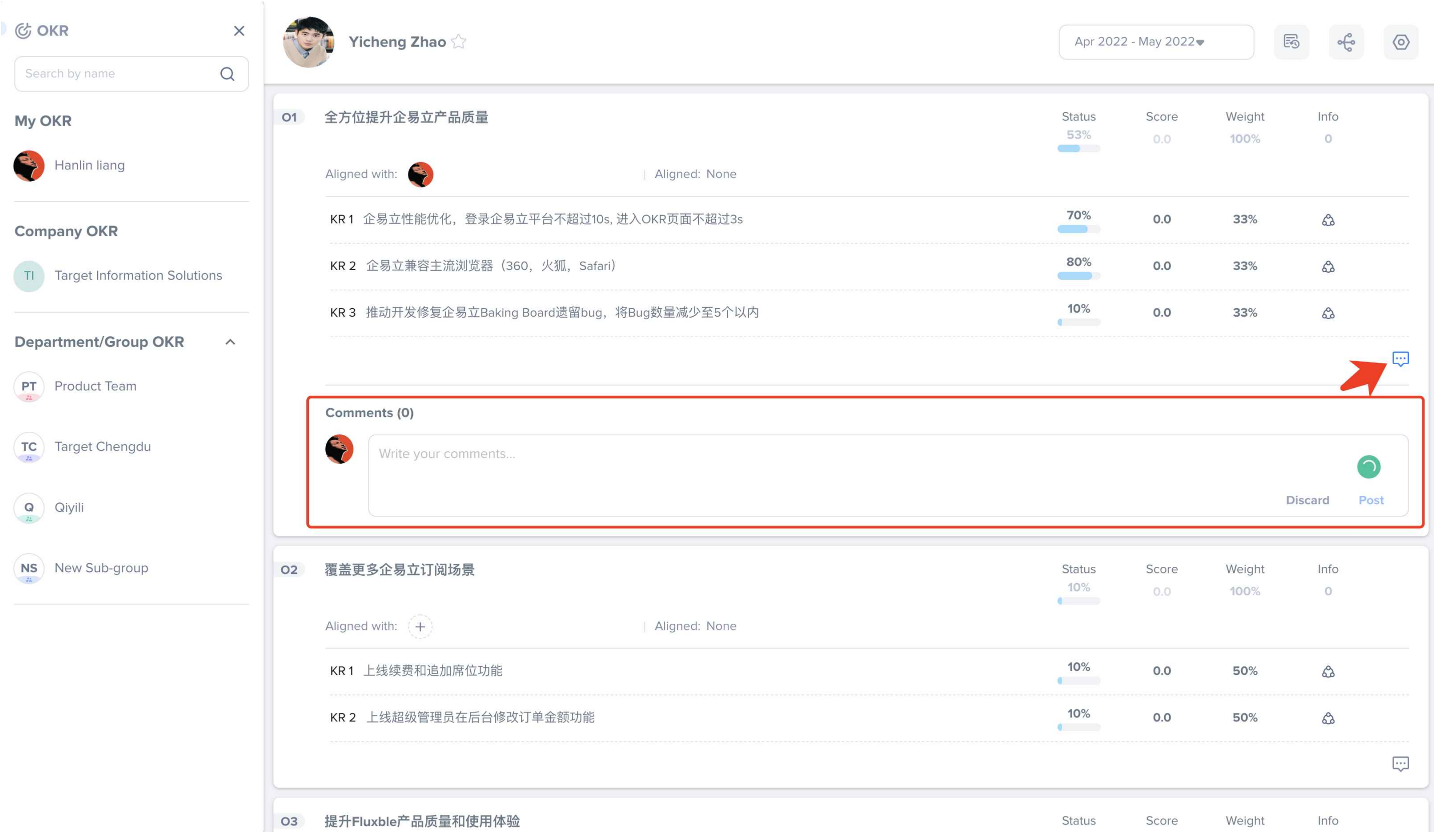


2. When there are OKR adding, deleting, editing, progress updating, etc for the departments and members being followed by the user, the user will receive notifications. By clicking the notifications, the user can enter the corresponding page to look at the details.



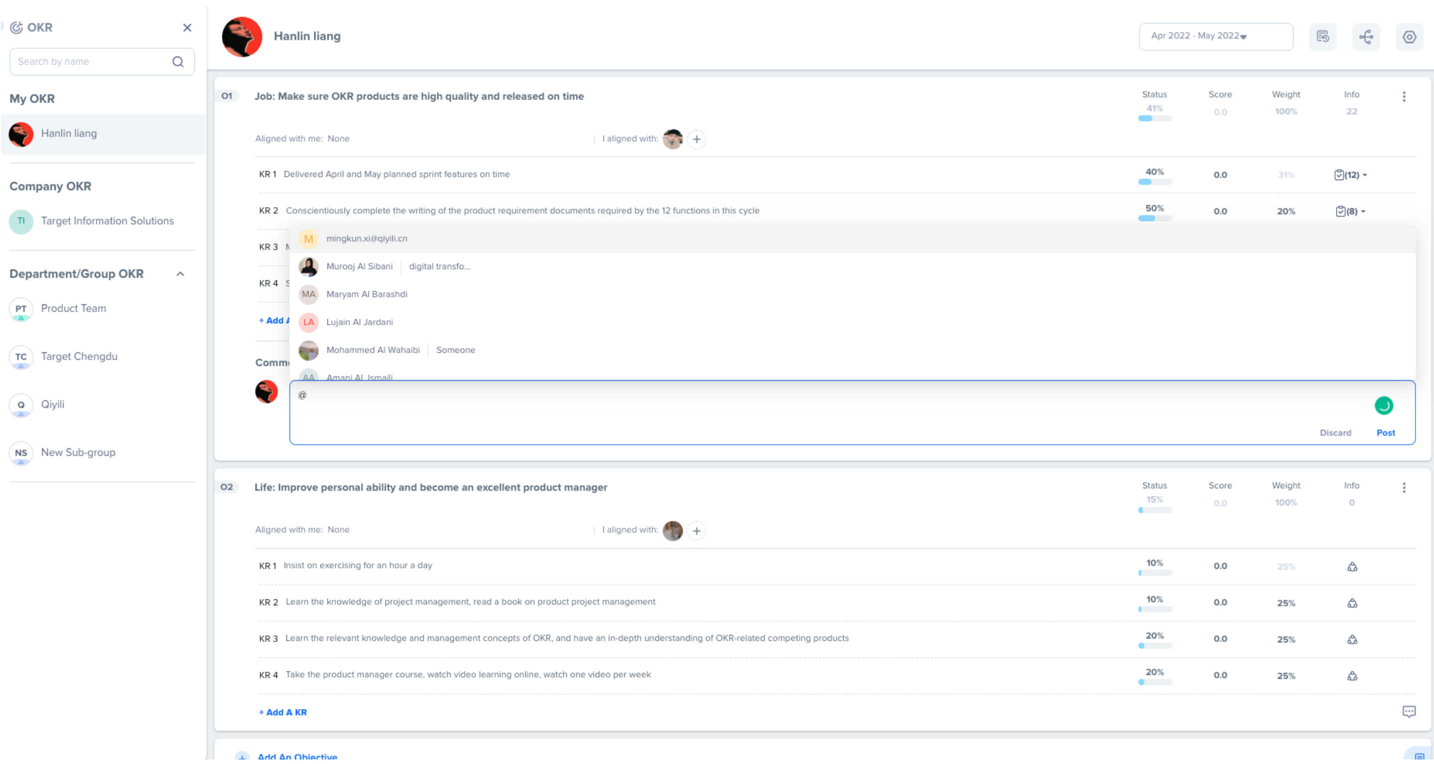
Comment

1. Click the comment button， and you can comment on the current "O".



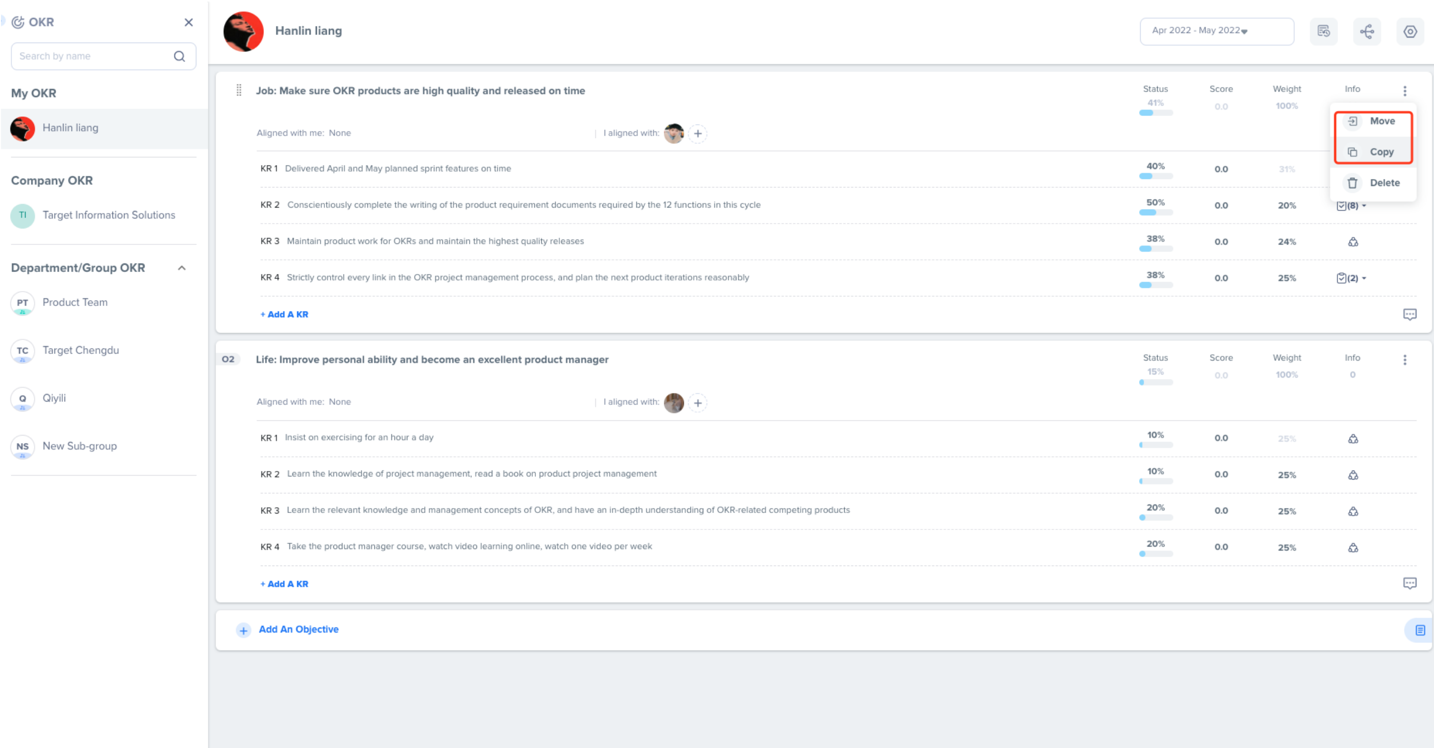
2. When you need other people to know or follow the objective, you can directly "@" their name.

People being "@" will receive notifications in the notification module, and they can jump into the corresponding comment positions by clicking the notifications.

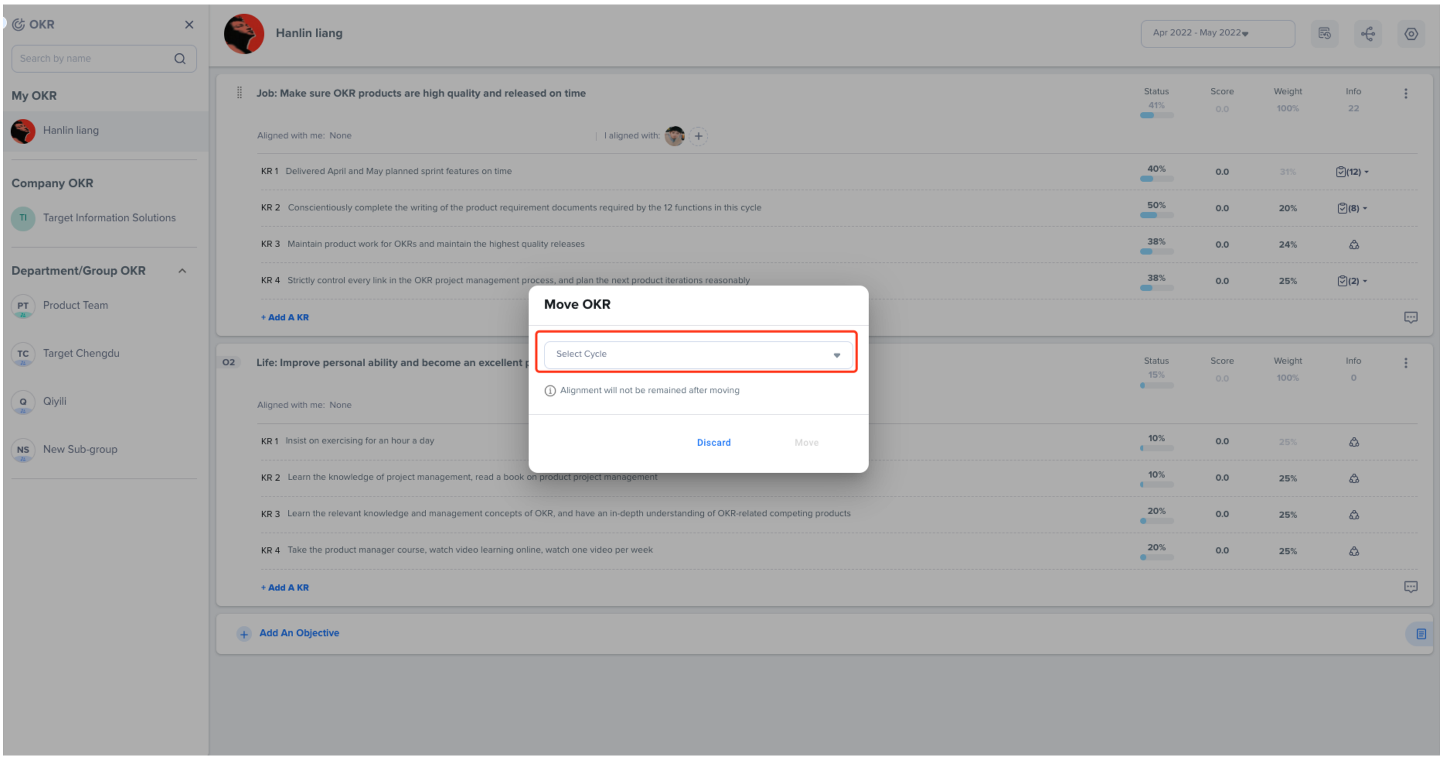


Move and copy OKR

1. Click the "more" button in the upper right corner of OKR, and you can move or copy OKR to other cycles.



2. After clicking 【Move】/【Copy】, you can select the cycle to be moved to. After selecting the cycle, you can click 【Move】/【Copy】 to move or copy the OKR successfully.

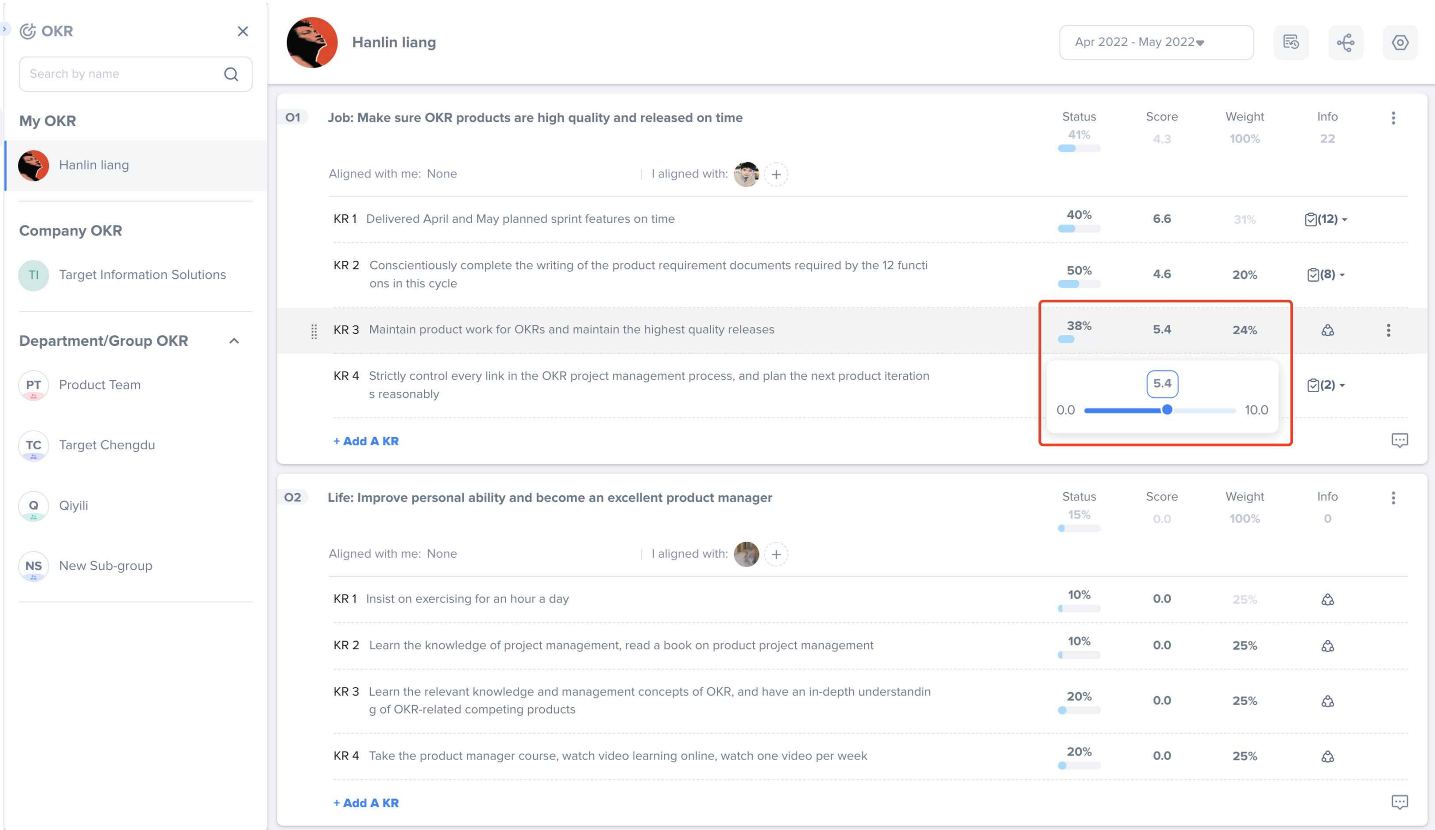


OKR Review

The review stage mainly focuses on writing a report based on the implementation of OKR in the current cycle and holding a review meeting to summarise it.

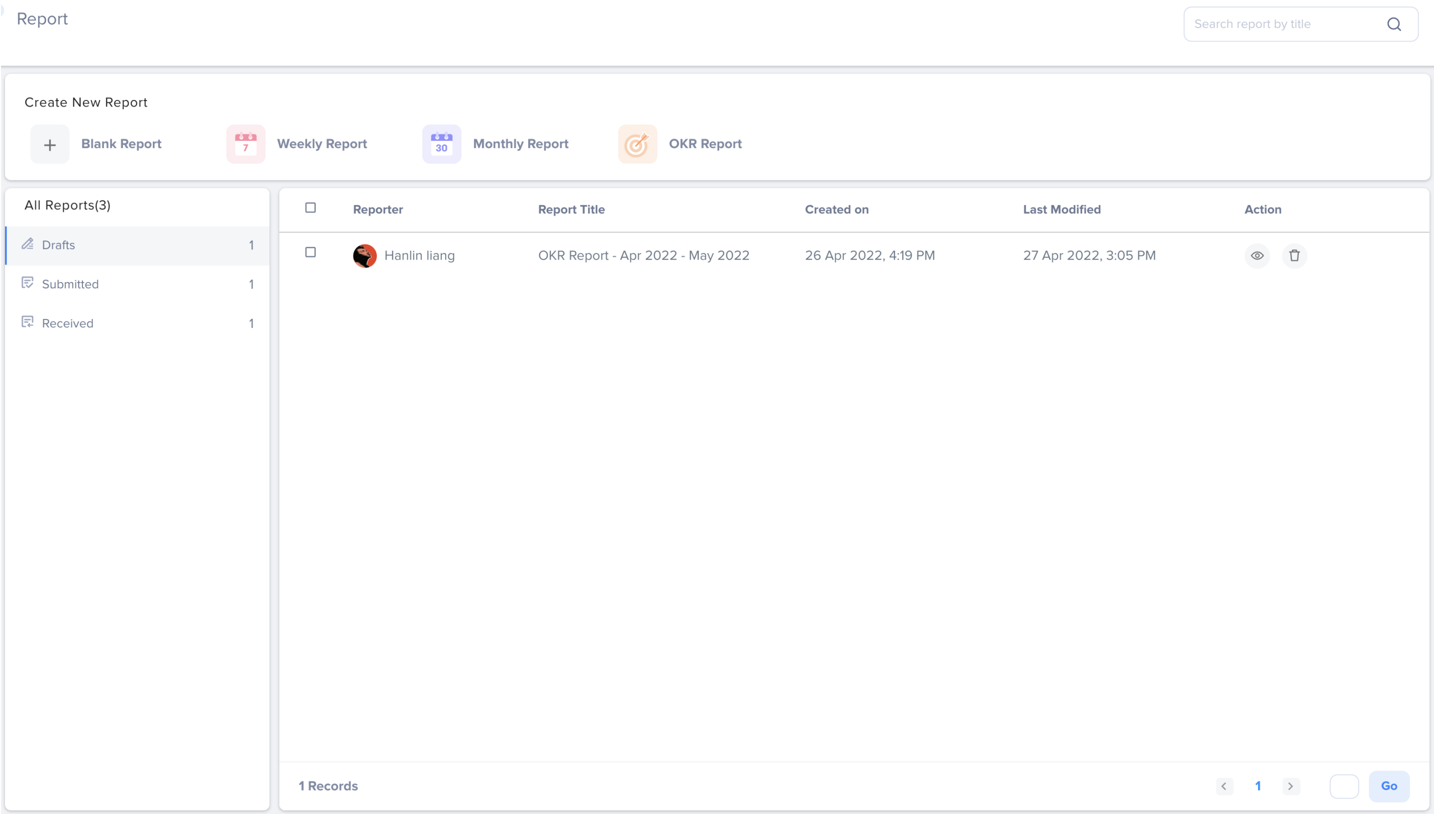
Score

Self-assessment scores for each of KR indicators to report and summarise.

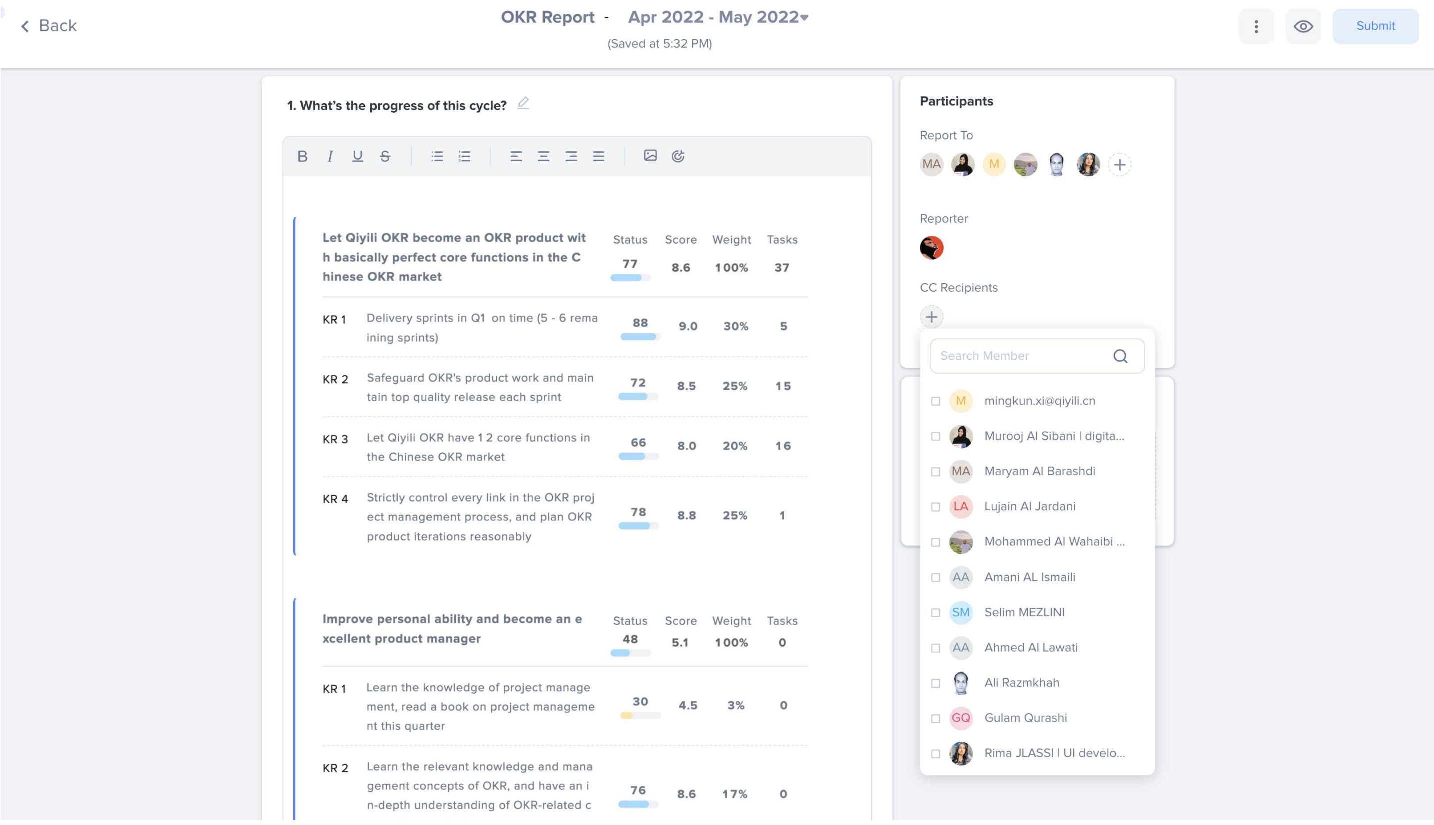


Report

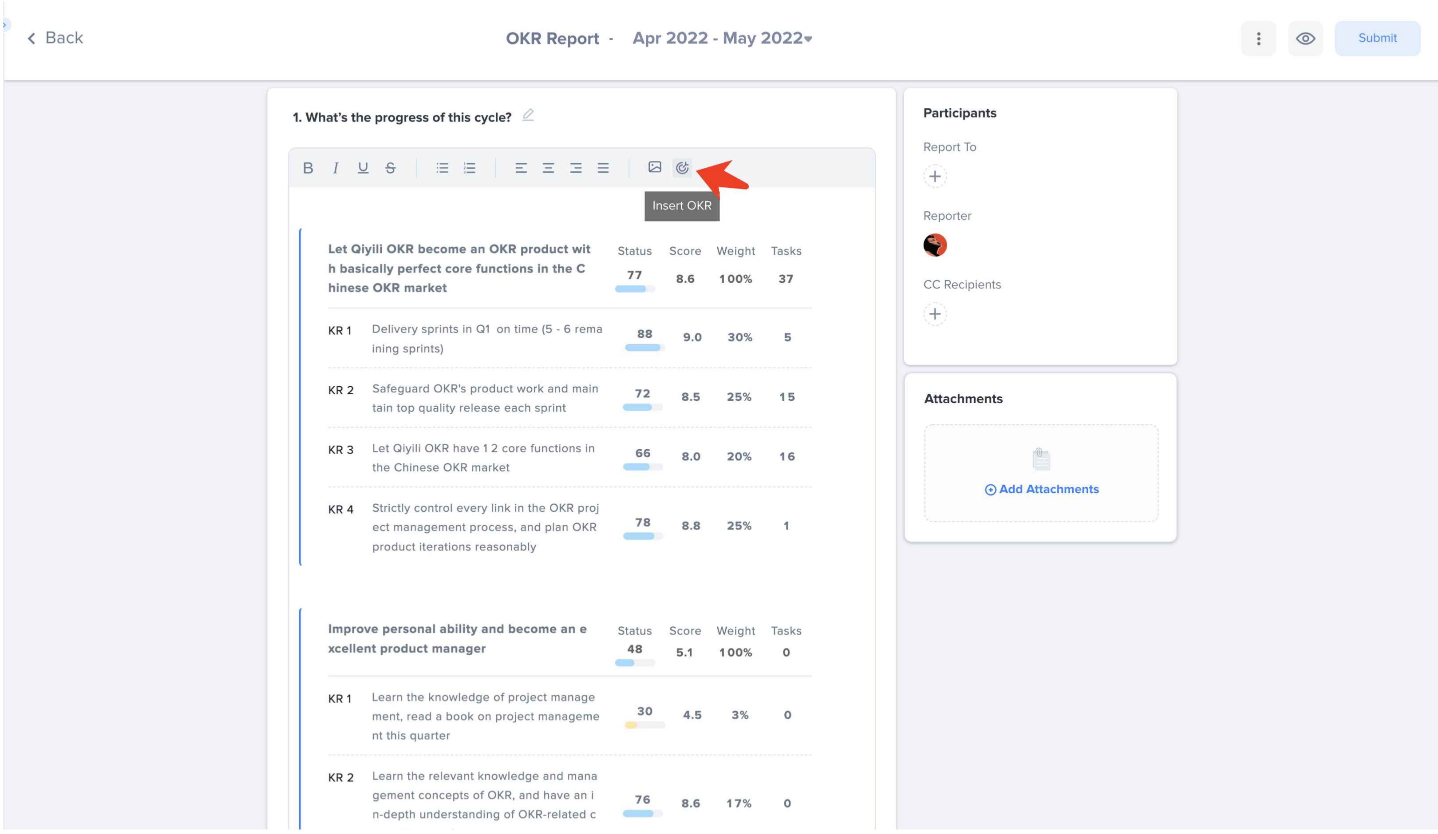
In the reporting module, you can write reports corresponding to different stages of OKR, such as Blank Report, Weekly Report, Monthly Report and OKR Report. On the Report page, you can see submitted and received reports as well as drafts.



1. Fill report
   Each content can be written accordingly to the heading guidelines. You can choose who to report to and who to copy in the report.

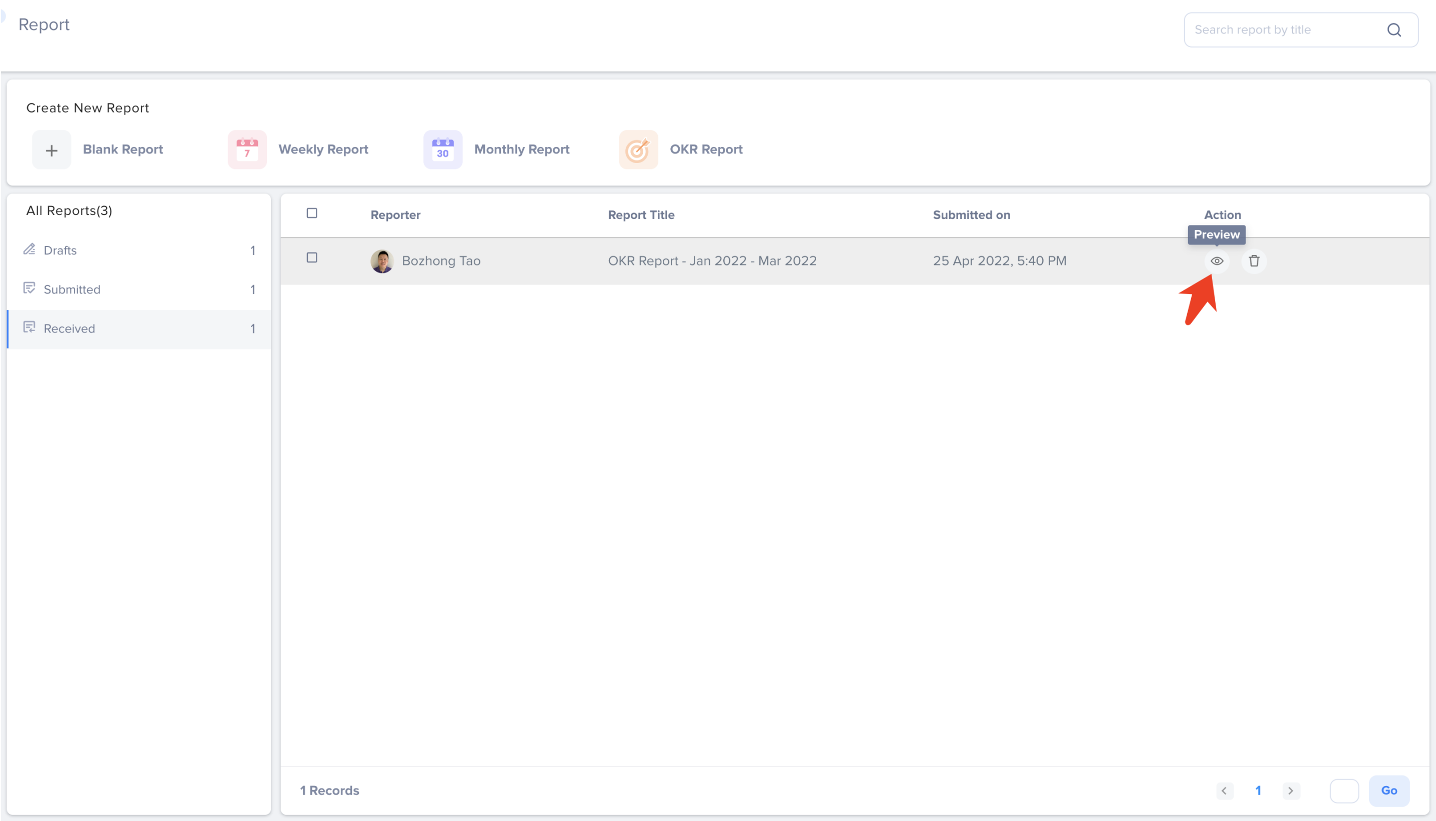


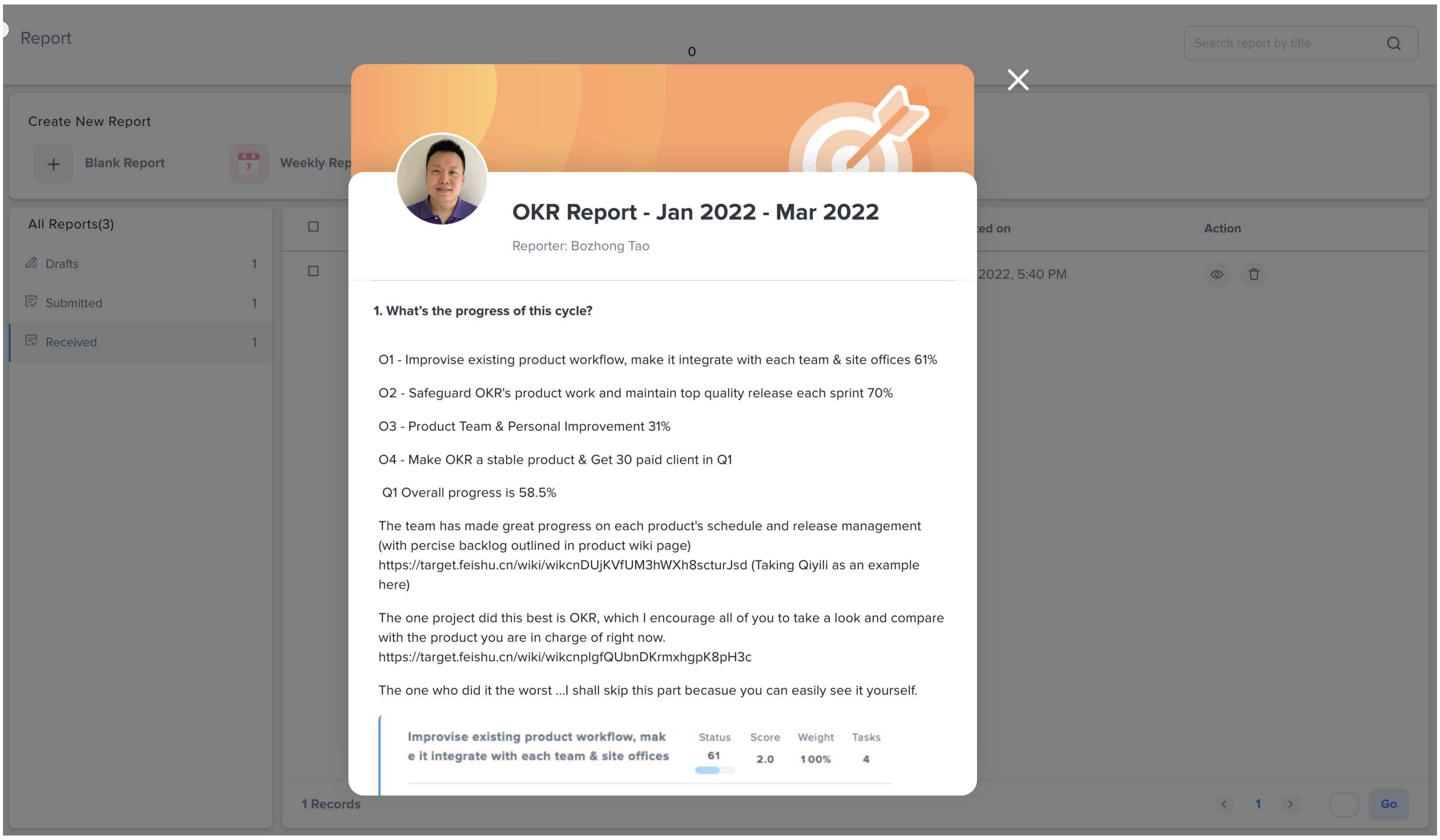
2. Insert OKR into the report.
   When writing a report, users can select the OKR of the corresponding cycle to insert it into the content, making it easy to view detailed information.



3. Preview report

You can click on the "Preview" button to view the report information in Drafts, Submitted and Received list, which supports the switch between left and right for a quick view of content.



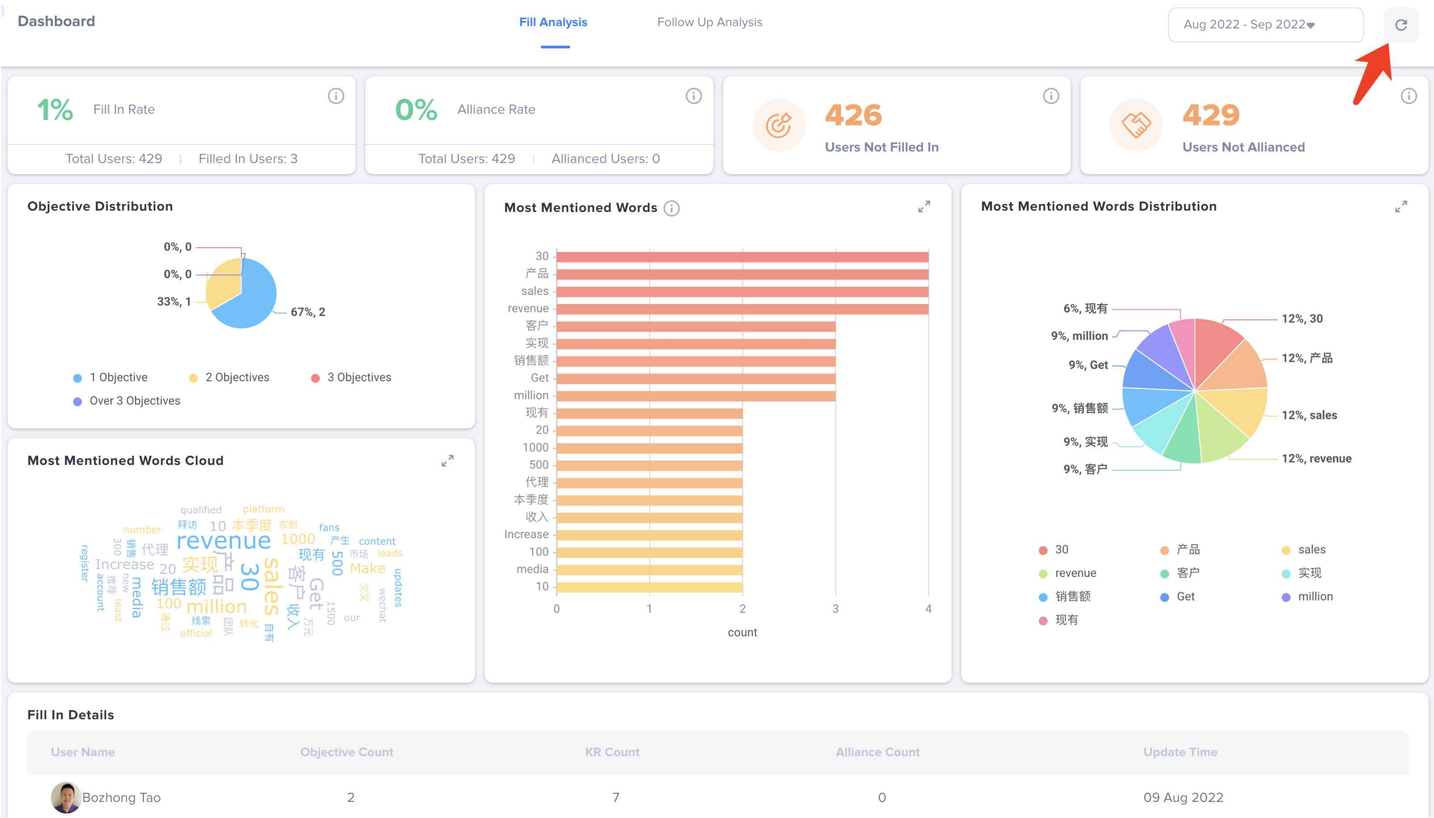


OKR Dashboard

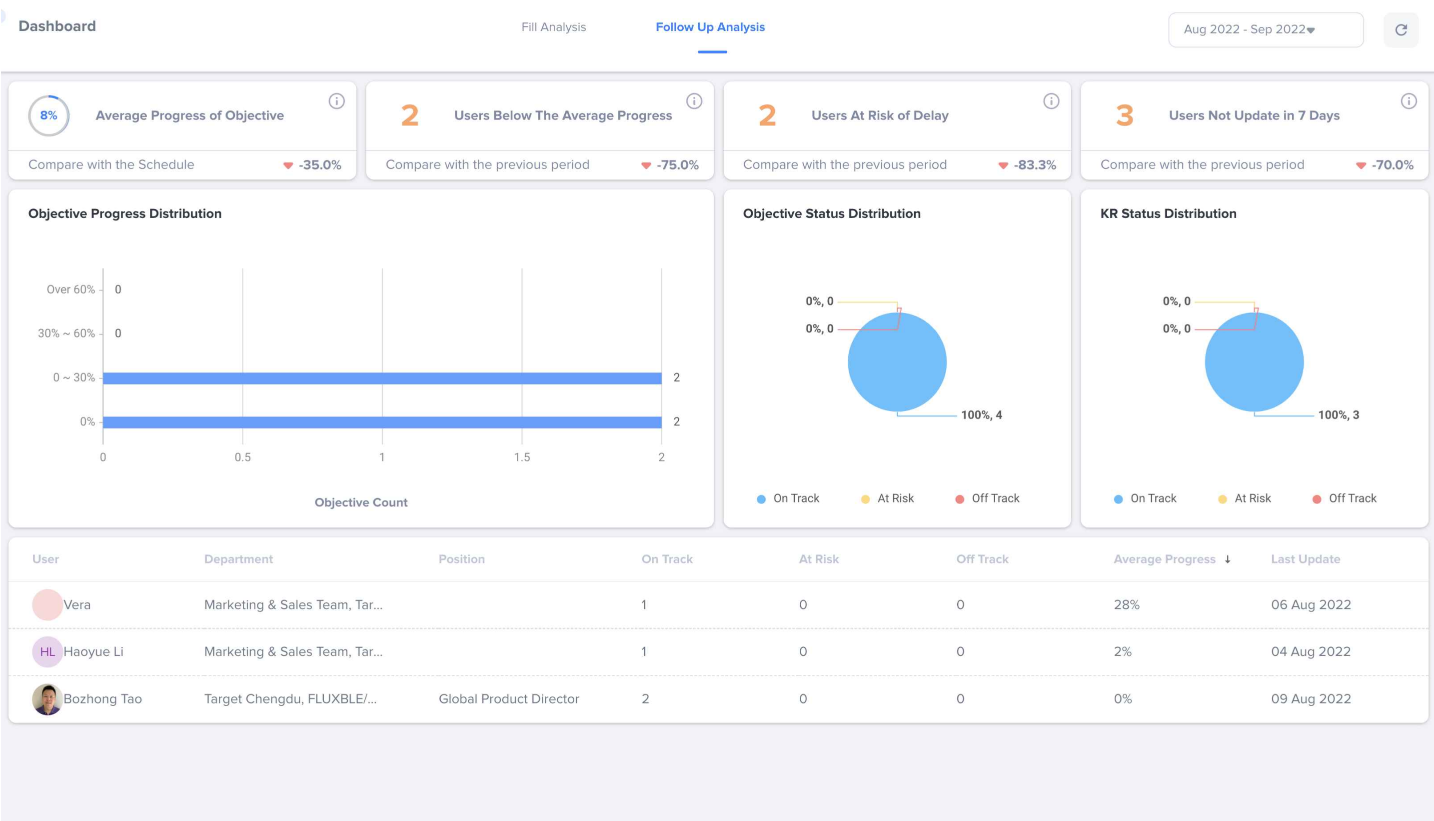
The dashboard provides a clear visualisation of the OKR completion and follow-up data in the form of charts. In the detailed table of data, it can be seen that the specific information of the users when filling out and following up OKR. The specific data of the company filling out and following up OKR can be analysed to determine if risks exist currently.

View data

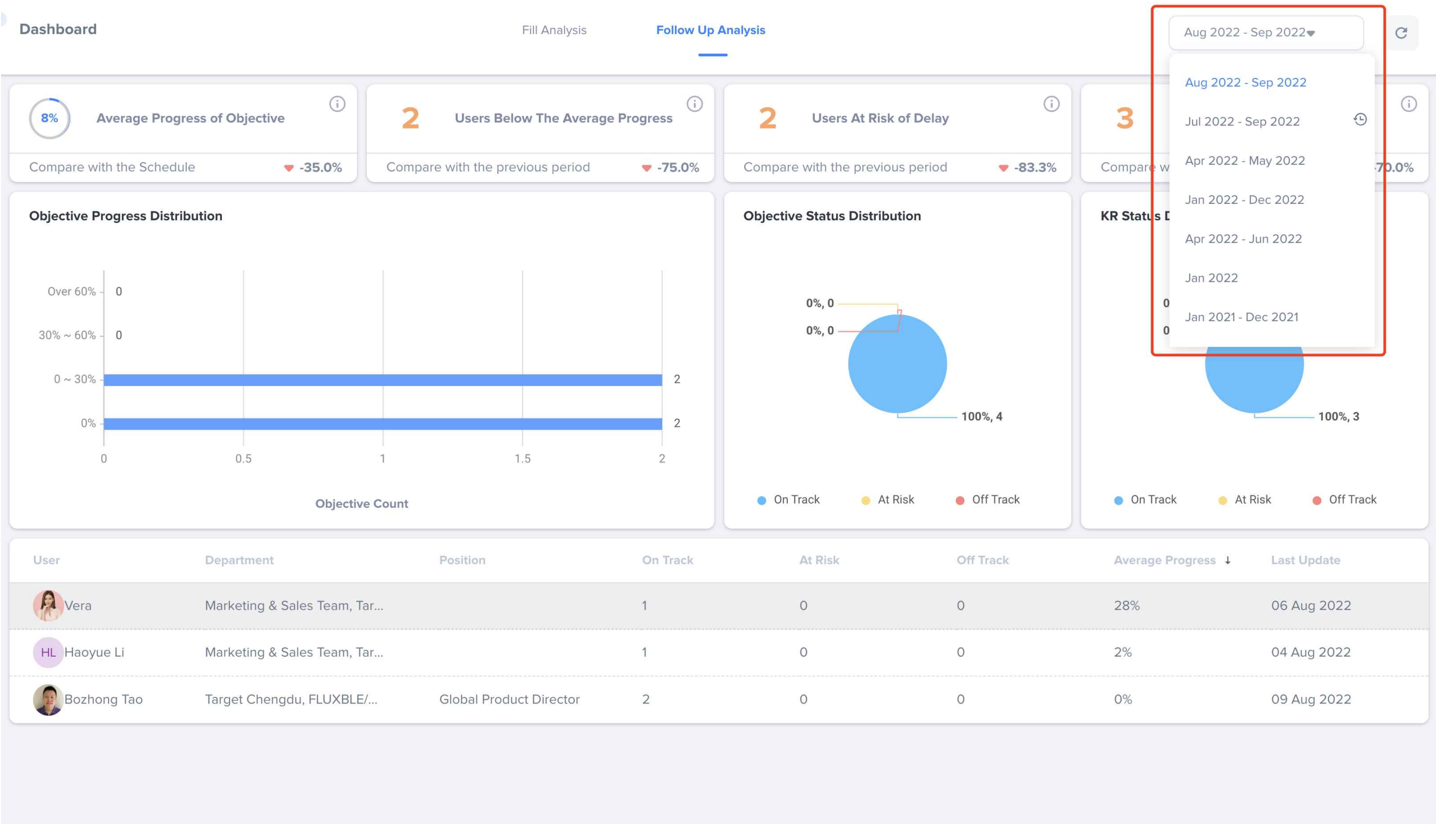
1. Click on “Dashboard" to access the OKR dashboard page, which includes "Fill Analysis" and "Follow-up Analysis". Click on the Refresh button in the upper right corner to update the data of the current cycle to the latest one.
   Fill Analysis



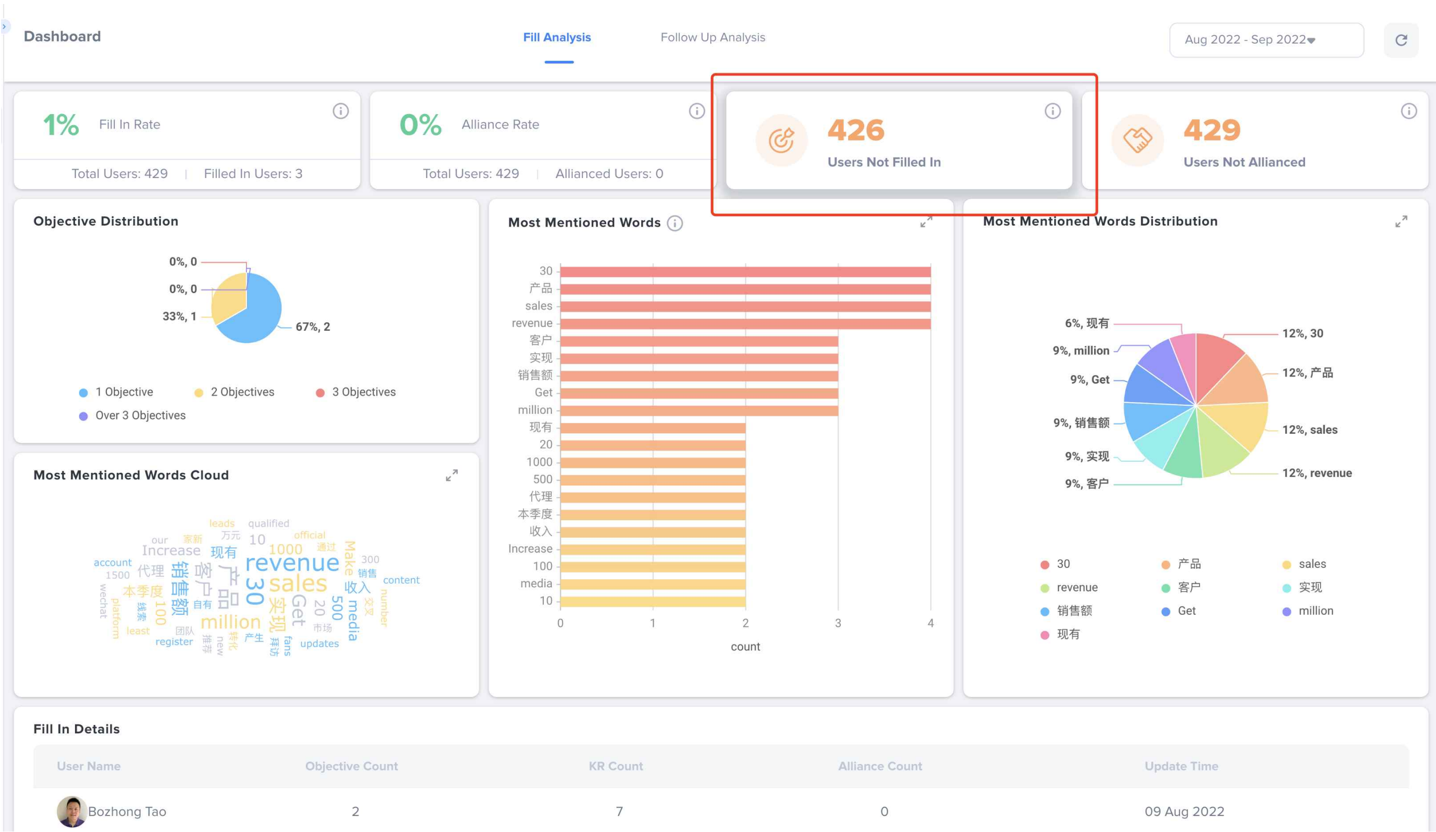
Follow Up Analysis



2. The dashboard's cycle selector gives you the option to view data charts for different cycles.



3. Drill-down function
   Part of the charts in the dashboard support drill-down functionality. Click on "Remind" on the drill-down detailed table page to send a reminder to the specific user.



Dashboard > Users Not Filled In Details

User Name	Department	Position	Fill-in Status	Action
Aamir Hussain Awan		DevOps	Not Filled	Remind
AA Abayomi Arigbabu			Not Filled	Remind
Abbas Mahdian			Not Filled	Remind
Abdesslam LIMAM			Not Filled	Remind
Abdul Waheed		Senior Geoscientist	Not Filled	Remind
AA Abdulaziz Al Mahrazy		Senior Document Controller	Not Filled	Remind
AA Abdulrahman Albalushi		Document control	Not Filled	Remind
Abhay Pawar		Geospatial Analyst	Not Filled	Remind
Abid		dummy test account	Not Filled	Remind
Abir Abidi		Managing Director	Not Filled	Remind
Adem UZUN		Front-end Developer	Not Filled	Remind
Adnan Raza		Software Engineer	Not Filled	Remind
Afra Al-Hasni		Urban Development Lead Engineer	Not Filled	Remind
AA Ahlam Abdullah Al Wahibi		Document Controller	Not Filled	Remind