STEP-BY-STEP GUIDE FOR SETTING UP AND USING AXY OKR

Axy OKR V1.19, August 2020

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Axy OKR

Axy OKR is the best tool to implement *Objectives and Key Results* methodology and management system into your organization.

Objectives and Key Results (OKRs) methodology is a widely spread strategy for goal setting within the best and high growth organizations. The purpose of OKRs is to connect company, team, and personal goals to measurable results while having all team members working together in one unified direction.

OKRs were first introduced and defined in Intel by Andy Groove. And nowadays OKRs are a fundamental piece for guiding organizations like Google, LinkedIn, Intel, Zynga, Sears, Oracle….

Objectives and Key Results: OKRs

An **Objective** represents **WHAT** you want to achieve. Objectives are **qualitative** goals. They have to be ambitious and set the direction and focus of the company, team or individual in a **period** of time. The objective has to be significant and action-oriented but challenging: the principle of inspiration.

The **Key Results** define **HOW** you are going to achieve that Objective. Key Results have to be specific, time-bound, and metric-driven; measurable and verifiable. They have to show the path to reach the objective.

The Objective is the desired outcome and the Key Results are the measurable steps or “pieces” required to achieve that outcome. It is necessary to define enough and relevant KRs that, when reached, produce the outcome. To produce the outcome when reached, it will be necessary to define the quantity and relevant KRs.

OKRs, to which we will refer frequently throughout this guide, are the set of objectives with its key results.

Let's see it with an example:

Objective:

- Improve Sales Team satisfaction

Key Results:

- Define Team Building Activities plan by April
- Coaching of key people in the Sales team by May
- Team building activities Q1 plan execution
- Employee Satisfaction Survey by mid-June: Employee Satisfaction Index >89%

This objective has been defined for the second quarter of the year (**Period**) and it has four Key Results, each of them with a **Due Date** and a **Target Result,** so therefore totally measurable.

OKRs have to enable the whole organization to work in the same direction (**Alignment**), with a common and clear target (**Focus**), easily measurable (**Tracking**) that motivates people to deliver the best of themselves (**Stretching**).

Focus-Alignment-Tracking-Stretching are the characteristics of good OKRs and as John Doerr defined in his book *Measure what matters*, the **"Superpowers"** that OKRs provide to organizations.

OKRs are driven and conveyed from the top-level of the organization: CEO or organization leader will set the **Company Goal**, normally for the year.

Alignment is key for organization success.
By aligning OKRs, you can set **Top-Down** or ask for **Bottom-Up** objectives

Setting Top-Down objectives will ensure that the organization is totally aligned with Company Goals. And asking for Bottom-Up objectives will leverage the commitment, innovation, and knowledge of every person in your organization to reach your goals.

A good balance between both types of objectives is key for OKRs implementation success. A best practice is set at least 50%-60% of the objectives Top-Down.

In order to guarantee alignment in the organization, any sort of objective has to be related to the Company Goal in some way: it could be related directly to the Company Goal or it could be related to an upper Objective through a parent Key Result. Each objective in the organization has to be related and contribute to another objective through one of its key results.

In this way the whole organization will be aligned with the Company goal and the Main Objectives.

On the following pages, we will show you how to use Axy OKR to easily set and manage OKRs within your company or organization.

What is this guide about

This guide will show you how to:

- **Setup OKRs for the first time**, following a quick and easy wizard that will help you define your Company Goal: the main OKRs at the company level, the periods in which you will focus your execution and the planning and wrap-up cycles.
- **Align the OKRs** definition and execution **for your organization**, setting Top-Down and Bottom-Up OKRs in a very easy manner thanks to the Tree view. We will explain these concepts later in detail.
- **Use Axy OKR** to manage the **planning, execution, and wrap-up** cycles for your OKRs.
- **Define Objectives and Key Results in detail**, to leverage all the functionalities of Axy OKR.
- **Analyze the OKRs** implementation, thanks to the **Axy OKR dashboards.**
- **Administrate the settings** to customize Axy OKR for your own organization.

In this guide, **Salesforce admin** will find as well how to:

- **Install** Axy OKR in your Salesforce org.
- Assign app **profiles and permissions.**
- Assign Axy OKR **licenses.**

- Access to **app logs.**

If you are installing for the first time Axy OKR, please go to Axy OKR Installation section

STARTING UP WITH YOUR OKRS

Company Goal, Main Objectives and Periods

With Axy OKR you must first define the **Company Goal**. The Company Goal sets the direction for the year. It defines the whole organization's target. The concept of Company Goal represents a Single Strategic view that the entire organization should follow during a year. It defines as well the cycle where your team is going to organize the OKRs.

Company Goal will be split into the **Main (Company) Objectives**. You should define 2 to 5 Main OKRs for your organization to stick to and follow the Company Goal.

Main Objectives have to be defined for the year. Owners of these Main Objectives can be the CEO or his/her Directors or VPs.

Then you have to think of the **Period** for OKRs execution and management. The quarter is the period that is most used. A quarter is short enough to ensure we maintain the focus on the objective and long enough to execute and to be reviewed several times.

Axy OKR will also allow you to define the **Planning** and **Wrap-Up cycles. Planning cycle** is the number of days you will use to plan (define) the OKRs for the next period. **Wrap-Up cycle** is the number of days used to review and learn from OKR execution from the previous period.

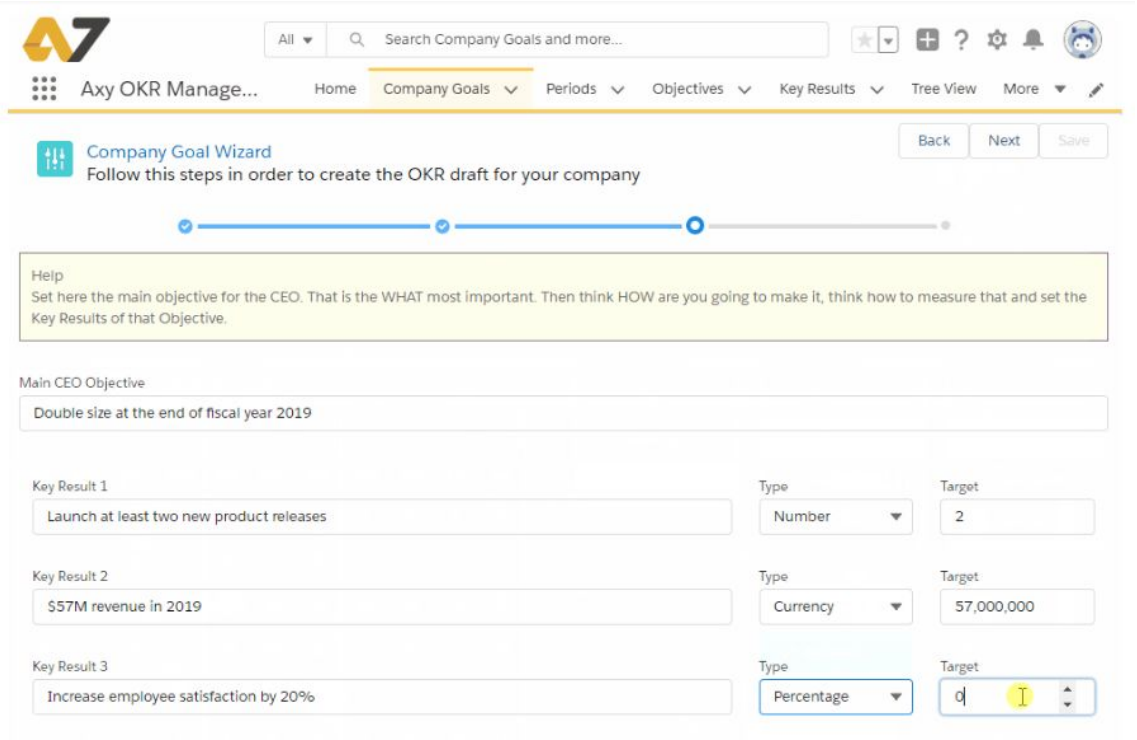
Axy OKR provides a **Wizard** that will guide you through 4 simple steps, to define your *Company Goal*, the *Period and Cycles*, the first *Main (Company) Objective* and its Key *Results*.

1. Navigate to ***Company Goal*** tab
2. Click on ***New***
3. Define **Company Goal** and Company Goal **Period** to achieve it
4. Define OKRs **Period Frequency, Planning** and **Wrap-Up**

5. Define the first **Main OKR** for the CEO or Main Manager
6. Review what you have defined and save

In our example:

- Company Goal: First one in market share in 2019
- Main Objective: Double size at the end of fiscal year 2019
  - Yearly objective
  - Period for OKRs: Quarter
  - Planning and Wrap-Up cycles: One week
- Key Result 1: Launch at least two new product releases
  - Type: Boolean
- Key Result 2: $57M revenue in 2019
  - Type: Currency
- Key Result 3: Increase employee satisfaction by 20%
  - Type: Percentage



Axy OKR will generate everything automatically and you can/should define other 2 to 4 Main Objectives and their related Key Results (Go to section Objectives to learn how to define them).

Important note: The ***Company Goal*** created with the ***Wizard*** is set as ***Not Public***, and the ***Main Objectives*** are set as ***Private***.

- You must change the **Main Objectives** to ***Not Private*** to permit other users to see them. With this and as long as you maintain the **Company Goal** as **Not Public**, only the C Level users will see that Company Goal.
- This behavior is enforced in order to permit C Level users to define and agree to the main OKRs prior to making them public to the rest of the organization.
- Once you are ready to start the OKR setting for the rest of the organization, change the **Company Goal** to **Public**.

Now you are ready to start with your OKRs planning cycle and for the alignment with your team.

ALIGNING YOUR OKRS

Alignment is key for organization success. For aligning OKRs, as we have mentioned previously, you can set Top-Down or ask for Bottom-Up objectives.

A good balance between both types of objectives is key for OKRs implementation success. A best practice is set at least 50%-60% of the objectives Top-Down.

Top-Down Objectives

Top-Down objectives should be set at **company** and **team** levels:

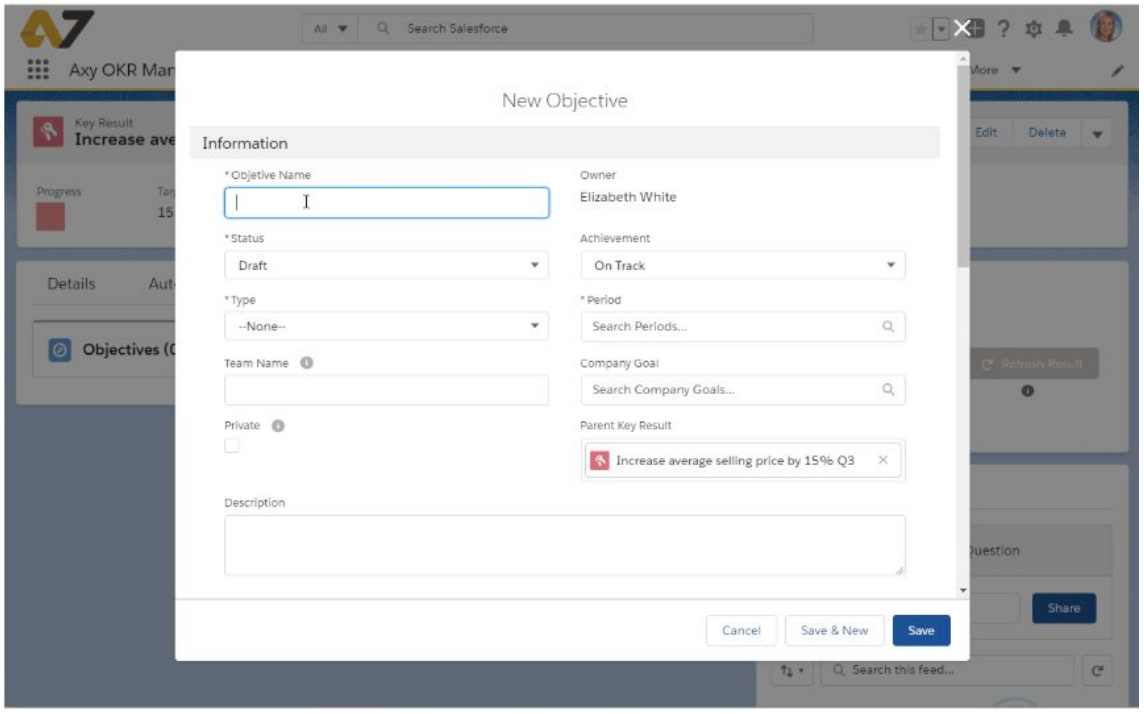
- CEO/Organization leader set Top-Down objectives to their VPs
    - VPs set Top-Down objectives to their Managers
        - ➢ Managers set Top-Down objectives to their team members

You can set Top-Down objectives defining the child objectives of one of your KRs and assigning them to your team.

Each of your KRs that you want to align Top-Down should have 2-5 Objectives for your team.

Let's see how to do it with Axy OKR:

1. Navigate to ***Objectives***
2. **Go to the objective** you want to set Top-Down
3. Navigate to ***Key Result*** tab in the Objective
4. Select one of the KRs and go to ***Child Objectives***
5. Define a ***New*** objective
6. **Assign** it to a person in your team



Repeat for every Objective you want to set Top-Down.

TIP: You can as well create a child objective directly from a Key Result using the ***Convert to Child Objective*** button or even from the Tree View.

A best practice is to leave the Key Results for the team. You know WHAT you want them to achieve and they know HOW to do it.

Bottom-Up Objectives

Your team will align their objectives, either defining their Bottom-Up OKRs or the KRs for the Objectives you have set Top-Down. Ask them to do it (Go to section Objectives to learn how to define them).

Each of the objectives of your team has to be related and contribute to one of your OKRs or other upper OKRs.

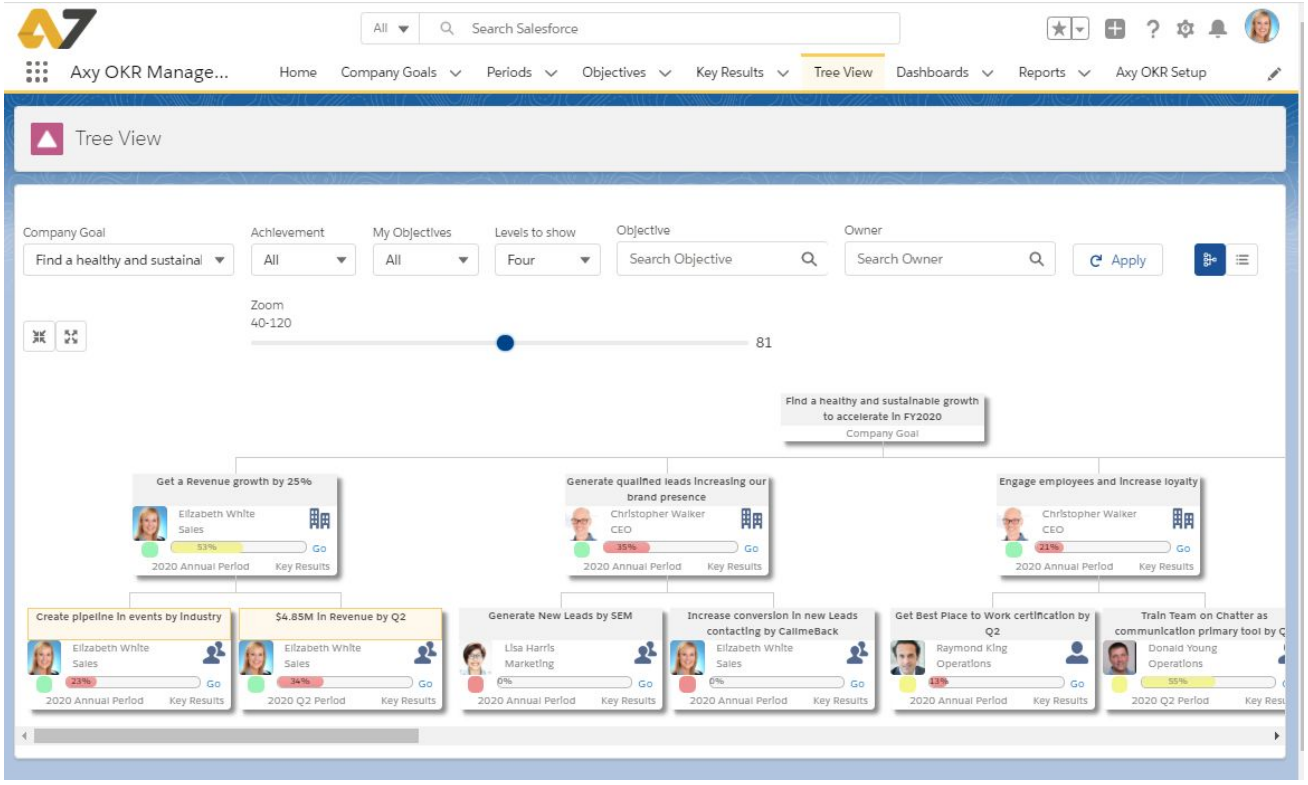
Alignment view

At this moment in the PLANNING of your OKRs for the year, the complete organization will see your company OKRs and can align their efforts towards them. (Be sure your company goal and the objectives that have already been set have the **PUBLIC switch** checked)

Then your team will continue setting down the objective through the different levels of your organization, following the same process.

This process of Bottom-Up and Top-Down objectives definition, performed sequentially at every level and by every team in the organization, will end with the complete alignment of everyone with the Company Goal and the main objectives.

Axy OKR has a powerful **Tree view** of the objectives, so anyone in the company can see the alignment of everyone else´s objectives.



USING Axy OKR

Planning

The planning cycle for the Year

The first step is to **set up the OKRs for the company for the year:** the **Company Goal** and the **Main Objectives.** The Wizard that was previously described will guide you on how to achieve it. This is the first planning phase. To give an example, **at the C-Level** you will:

- Define Company Goal
- Set the Top-Down objectives, several or all Main Company Objectives to the C-level.
- The C-level team will define Key Results for those Main Objectives
- Ask them for Bottom-Up objectives. C-Level will discuss and set them.

Then **Planning will go down through the organization**:

- C-Level will set Top-Down and ask for Bottom-Up objectives.
- The same process will be followed by Managers with their teams
- Every individual will have their Top-Down objectives and set the Bottom-Up ones.

Period planning cycles

During the year you will have other planning cycles, one for each of the periods you have defined. Typically per quarter, you have to:

- Define the quarterly Objectives for the company
- Cascade Top-Down OKRs into the organization
- Ask for Bottom-Up OKRs
- Have team objectives discussions
- Approve objectives if needed by managers

In order to manage the progress of Planning cycle, Axy OKR provides the Planning Dashboard

Execution

Execution cycle starts automatically at the Period starting date.

The most important thing during the execution phase is the **Check In.** Axy OKR can help and encourage your users to review every week their OKRs progress (See Check In & Pulse setup in the Axy OKR setup section):

- Update manual type KRs
- Update Tasks in TODO type KRs
- Review KRs progress automated by bound reports (see *Tracking key results* to know about tracking Automation)
- Review and assess the **Objective Achievement**

Checking In every week will help users to establish a discipline for tracking their Objectives and KRs in order to take actions and understand the validity of the planned OKRs

And, of course, Execute, Execute, Execute!!

In order to manage the progress of Execution cycle, Axy OKR provides the Execution Dashboard

Wrap-Up

The wrap-up cycle starts automatically at the Period end date.
What to do in Wrap-Up cycle:

- Update the final result of every manual type OKRs, including the last tasks for the KRs based on tasks
- Sit down with your manager to **discuss** your progress on OKRs during the past period.
- Receive his/her **feedback**
- Think of and **review** the validity of the actions and key results that have been defined in order to reach the objective. Analyze whether obtaining the key results have actually contributed to the objective or not
- **Score** the objectives. Axy OKR will show you, as a guidance, the **Achievement** and the **Progress %**, according to the KR actual results and the assigned weights. But you and your manager have to really score the Objective. This scoring is a number between 0 and 1:

    - 0.7 to 1.0 = green. (We delivered.)
    - 0.4 to 0.6 = yellow. (We made progress, but fell short of completion.)
    - 0.0 to 0.3 = red. (We failed to make real progress.)
- **Learn** from it to plan the following period

In order to manage the progress of Wrap-Up cycle, Axy OKR provides the Wrap-Up Dashboard

OBJECTIVES AND KEY RESULTS IN DETAIL WITH Axy OKR

Objectives

Define an objective

An Objective represents WHAT you want to achieve. The Objective will also require defining HOW you are going to achieve that by creating Key Results.

In order to guarantee alignment in the organization, any objective has to be related to the Company Goal in some way:

- It can be related directly to the Company Goal, as with the Main Objectives
- It can be related to a parent Key Result

Relating a **child objective** to a **parent Key Result** means that your objective is aimed to contribute in some way to that OKR.

Objectives have **Level** and **Type**. The Level is implicitly detected from the parent relation. The Type could be **Company, Team or Individual**.

The Objective also needs to have a **Period** where it is supposed to be achieved

An objective is normally related to an upper-level Key Result. But it can be related as well to someone's key result at the same level, in his/her team or in other areas of the organization.

An Objective has a **Status**. This status governs the behavior of the objective during OKRs periods:

- **Draft**. This status is used when OKRs are in the planning process. Draft Objectives are not shown in the Tree view.
- **Active**. This status implies that the objective is in execution mode.
- **Completed**. At Wrap-Up time, the objectives should be set to completed
- **Cancelled**. The objective is not taken in account any more.

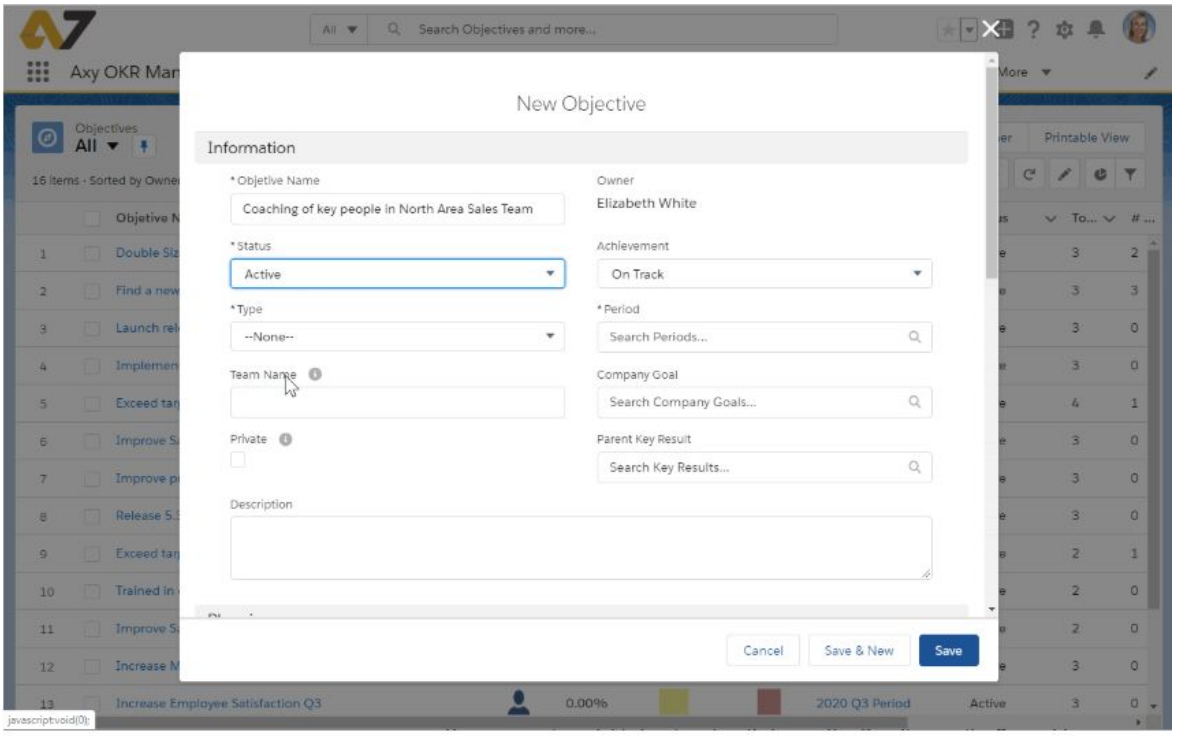
New Objective

Follow the next steps to define an Objective:

1. Navigate to ***Objectives*** tab
2. Click on ***New***
3. Define **Objective Name, Status, Type, Period** and **Parent Key Result** to align
4. Decide **start** and **end dates** for your objective
5. Review what you have defined and save

In our example:

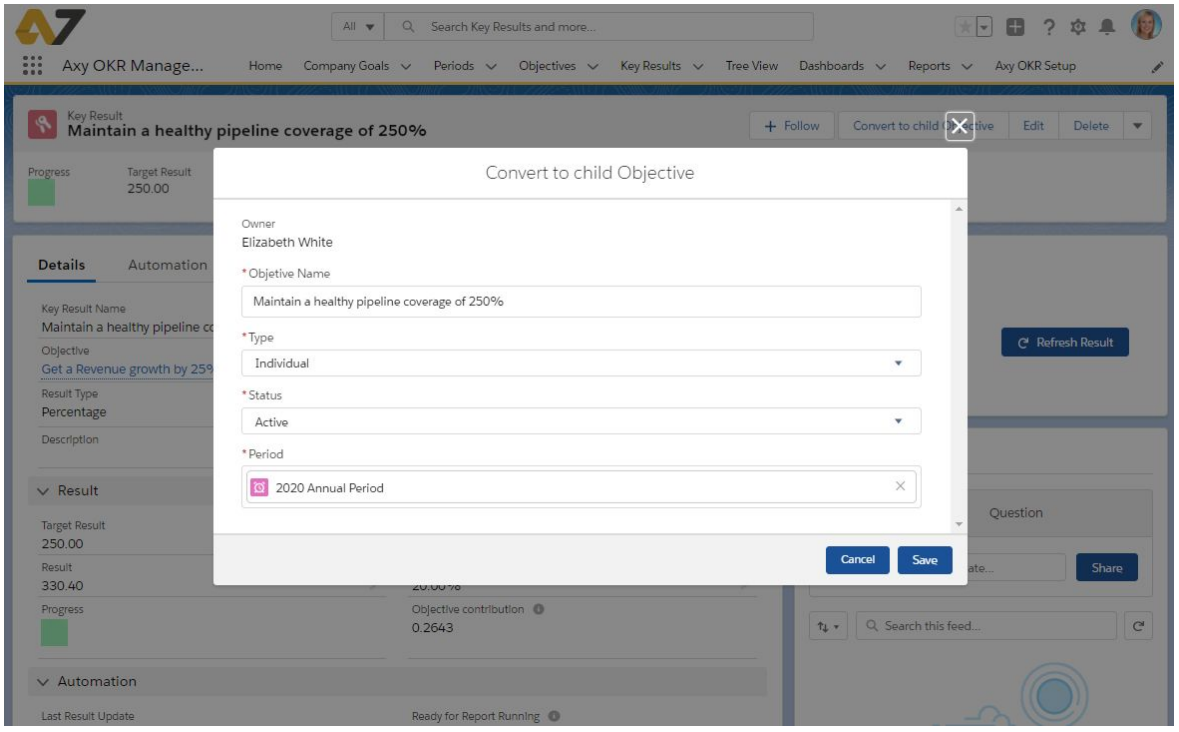
- Objective Name: Coaching of key people in North Area Sales Team
- Status: Active
- Type: Individual
- Period: 2020 Q3 Period
- Parent Key Result: Coaching of key people in the Sales team Q3



Convert a Key Result into an Objective

You can create a child objective directly from a Key Result using the ***Convert to Child Objective*** button. This is a fantastic way to contribute and directly align your objectives with the OKRs of other people in the organization.

1. From any Key Result page, click on ***Convert to Child Objective*** button
2. A pop-up window with default information from the Key Result appears
3. Edit **Objective Name, Type, Status** and **Period** if needed and save
4. If you go now to **Child Objectives tab**, you will see your new Objective



Objective Ownership

The owner of an objective is, by default, the one that has created it. But sometimes an objective needs to be reassigned to another user. For example, when you create OKRs for others following the Top Down practice, you have to change the owner.

Who can change the owner of an objective?

The objective ownership can be changed to other person by

- The current owner of the Objective
- The Salesforce Admin user that have full access to any object

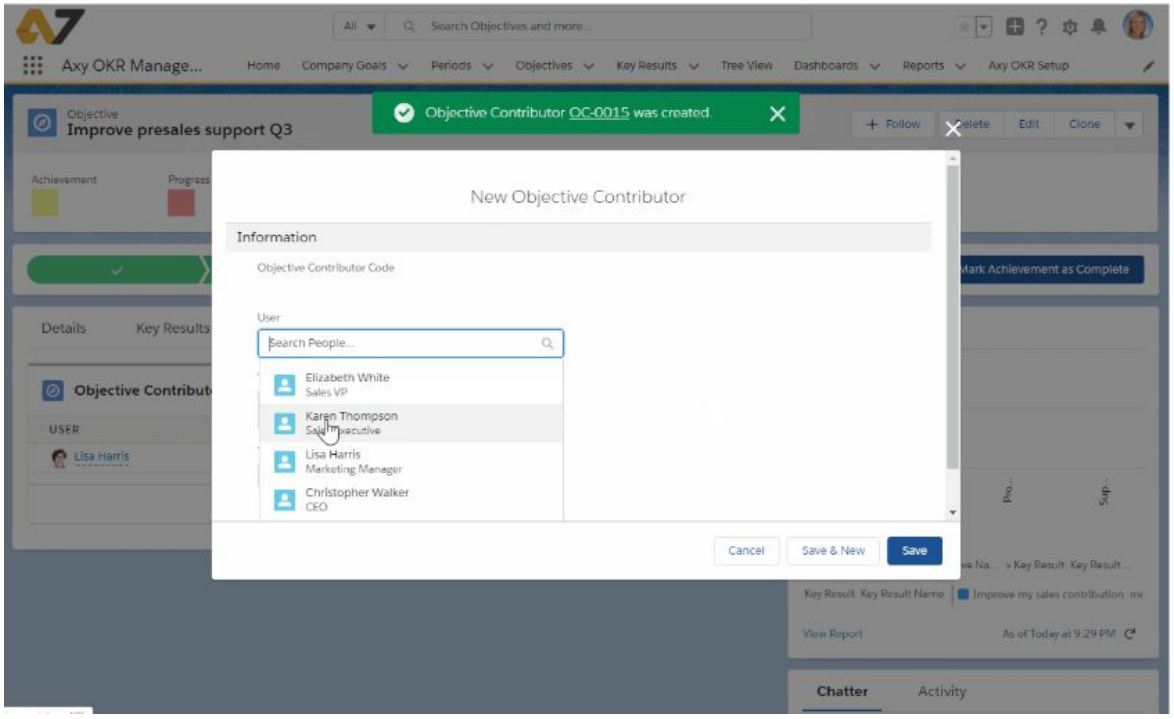
- Any user above the current owner in the hierarchy

If any user different from these three types tries to change the owner of an objective, the following error will appear:

“Insufficient access rights on cross-reference ID”

Objective Contributors

When an objective is ***Team*** type, the members (users) of the team can be defined in Axy OKR as ***Contributors*** to that objective.
A team member can be ***Responsible*** or just a Contributor. This ***Role*** must be defined when you are assigning the contributors to the objective.



Objective Tracking and Progress Status

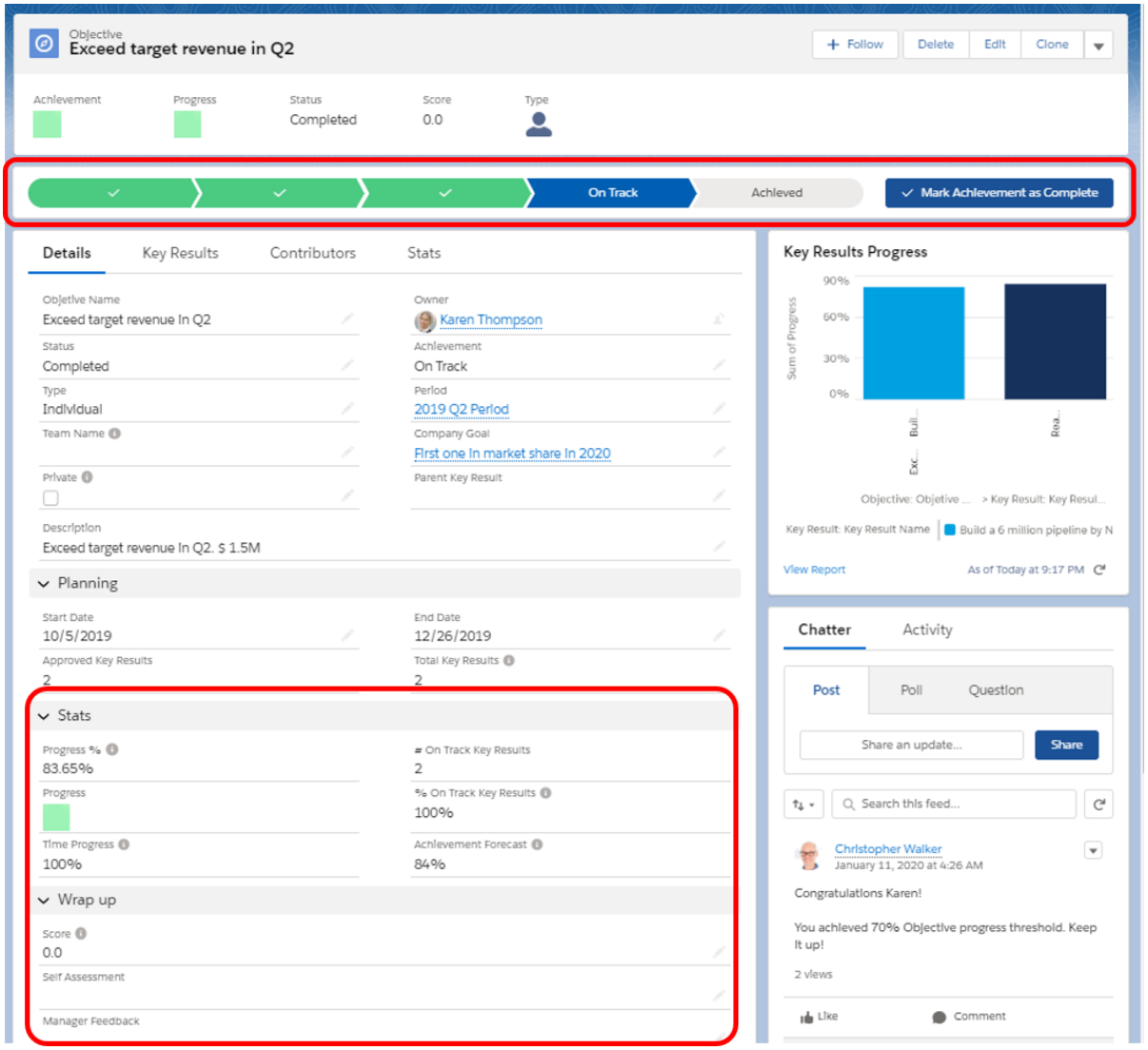
Axy OKR has several parameters for assessing the forward or completeness status of both Objectives and Key Results.

OBJECTIVES have several fields that indicate status, and all are automatically calculated. During the Execution, you have to track the following fields:

- **On TRACK key results**: Indicates the number of KRs whose progress is above 70%.
- **PROGRESS (%).** Indicates the percentage of progress based on the Progress of KRs and the weight of each KR in its contribution to the OBJECTIVE

  Example: An OBJECTIVE with two KRs, one with 100% progress and a weight of 40% and another with 40% progress and a weight of 60% will result in an OBJECTIVE PROGRESS of 64%.
- **ACHIEVEMENT FORECAST**. It is an indicator of the progress depending on the elapsed time. If it is less than 100% it indicates that there may be a risk of not reaching it
- **ACHIEVEMENT**. This field is calculated automatically if desired, or assigned manually. It is an indicator of the good progress of the OBJECTIVE. If it is automatic, it is calculated based on the Achievement forecast and the time remaining to reach the OBJECTIVE.

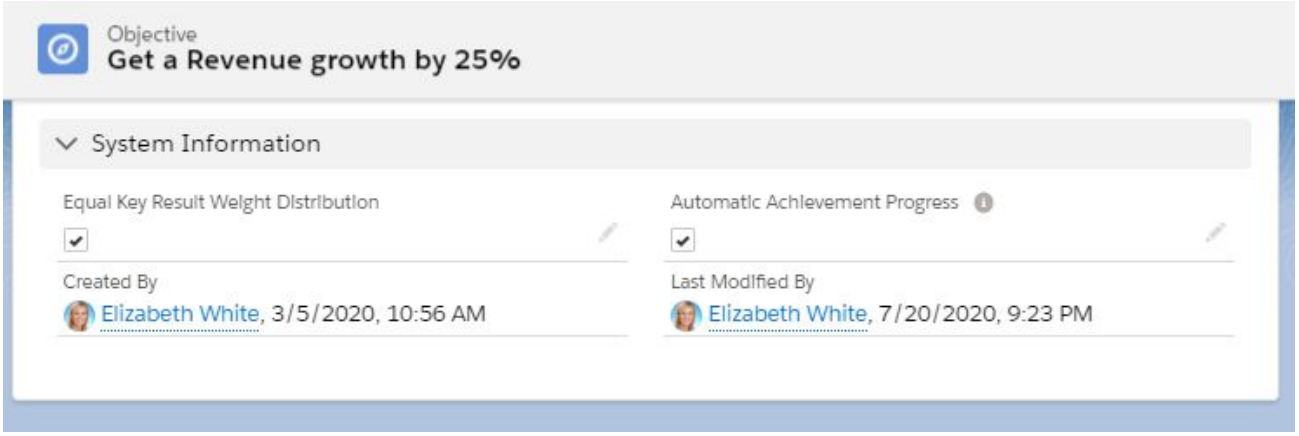
When entering into the Wrap Up cycle, the objective has to be graded in the **SCORE** field. The owner decides, based on his/her analysis of the achievement and the way in which he/she has worked to achieve the objective, how to score the final Objective result.



Achievement and Progress automation

Both Achievement and Progress have an automation switch at the bottom of the Details tab in the Objective view:

- If the **Automatic Achievement Progress** checkbox is marked, Axy OKR will calculate Achievement based on Achievement Forecast and on the elapsed time. Manual entry for Achievement will not be permitted.
- If the **Equal Key Result Weight Distribution** checkbox is marked, Axy OKR will assign the same weight value (in %) to every defined Key Result. No manual entry on Key Results individual weights will be taken in account.



Key Results

Define a Key Result

Every objective should have from 3 to 5 Key Results. These Key Results define HOW we aim to reach our objective (the WHAT).

Key results in Axy OKR can be typed as **boolean, number, percentage, currency, TODO** lists… any of the types allow assigning a **target value** to a Key Result in order to measure the progress. These types are used to measure different categories of KRs:

- To reach or meet an specific outcome, you can use NUMBER or CURRENCY
- To reduce or increase any metric in a portion, use PERCENTAGE
- For reaching thresholds or meeting specific conditions, use BOOLEAN (Yes/No)
- If you want to track milestones or activities, then use TODO type

A really powerful feature is the possibility of **binding a Salesforce report** to automate the progress tracking of the key result.

Axy OKR automatically runs the bound report every night in order to update the Key Result's result and update the objective progress.

The Key Results have the same **Status** field than Objectives. The KR status follows the status behavior of the Objective: when an Objective changes to Active, Complete or Cancelled, the Key Results are updated accordingly.

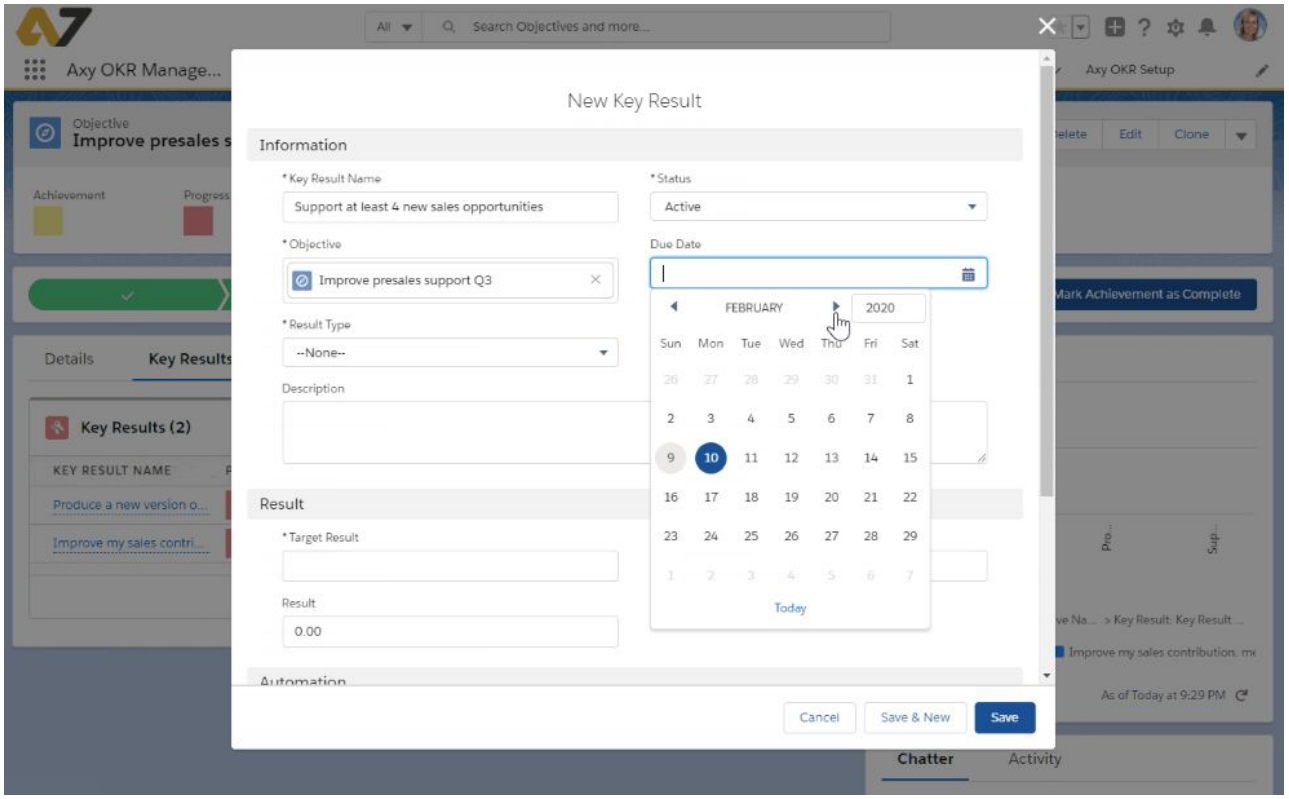
New Key Result

Go through the following steps to define a Key Result

1. Navigate to ***Key Results*** tab or, if you are on the Objective page, navigate to ***Key Results*** subtab
2. Click on ***New***
3. Define **Key Result Name, Status, Objective, Result Type,** and **Target Key Result**
    i. Note: If the **Objective is Active**, then the **KR Status is set to Active** by default
4. Decide **Due Date** for your key result
5. Define the **Weight**: Percentage of objective contribution. This is normalized by default.
6. Review what you have defined and save

In our example:

- Key Result Name: Support at least 4 new sales opportunities
- Status: Active
- Objective: Improve pre-sales support
- Result Type: Number
- Target Key Result: 4
- Due Date: June, 20th 2109
- Weight: 35%



Key Results using Positive or Negative metrics

Usually you meet a Key Result when you reach or pass it. So when the result is higher than the target, you are done. In an example:

- You define a KR to reach an NPS of 150. You will use NUMBER as type.
    - If you have an NPS of 100, Axy OKR will calculate progress as 66%
    - If you have a 165 NPS, Axy OKR will calculate progress as 110%

This is what we call a **Positive metric**: the progress is higher when the number or % is higher.

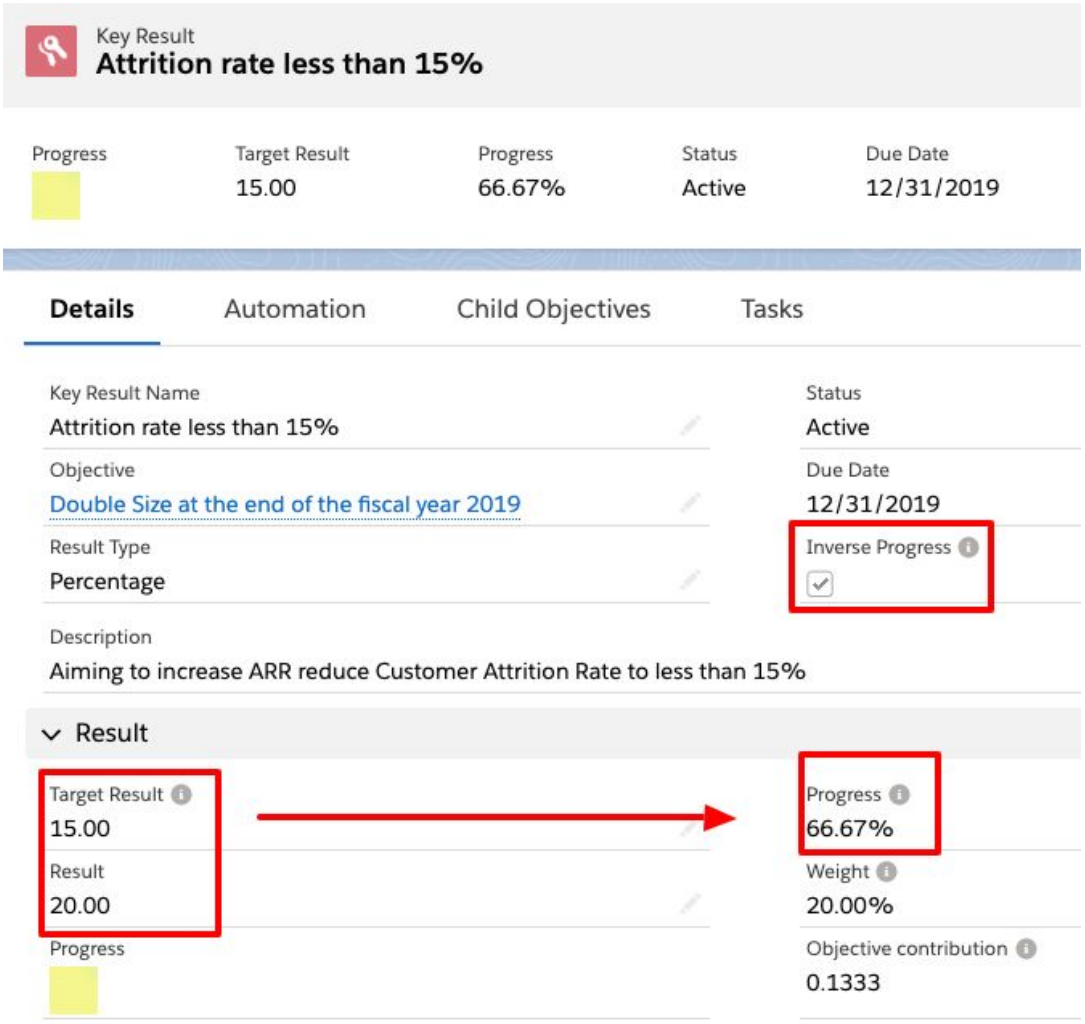
But sometimes you need to track a reduction of any business parameter. They are called **Negative metrics**:

- Reduce the Customer churn rate to 10%
- Employee attrition lower than 12%
- Average Age Opportunity less than 65 days

Axy OKR measures as well the progress on a Negative metric. We called it: **Inverse Progress** since you are progressing well when lower results are getting.

It is quite simple: by just **checking the Inverse Progress checkbox** in the Key Result the system will automatically calculate the Key Result progress in Inverse mode.

The following Key Result has a target of 15%, and a result of 20%. Being negative, the lower the result the better the progres:



Tracking Key Results with Reports

A very unique feature of Axy OKR is the possibility to track and measure the progress of a Key Result binding Salesforce reports to them.

You can set any aggregated report field of any report to the Key Result you want to track. A few examples:

- Pipeline coverage, quota attainment, revenue amount… for Sales KRs
- Average case time resolution, percentage of First Call Resolution… for Customer Care KRs
- Number of MQLs, SEM efficiency by UTMs… for Marketing KRs
- The number of New Distributors, revenue from Dealers… for Channel Sales KRs

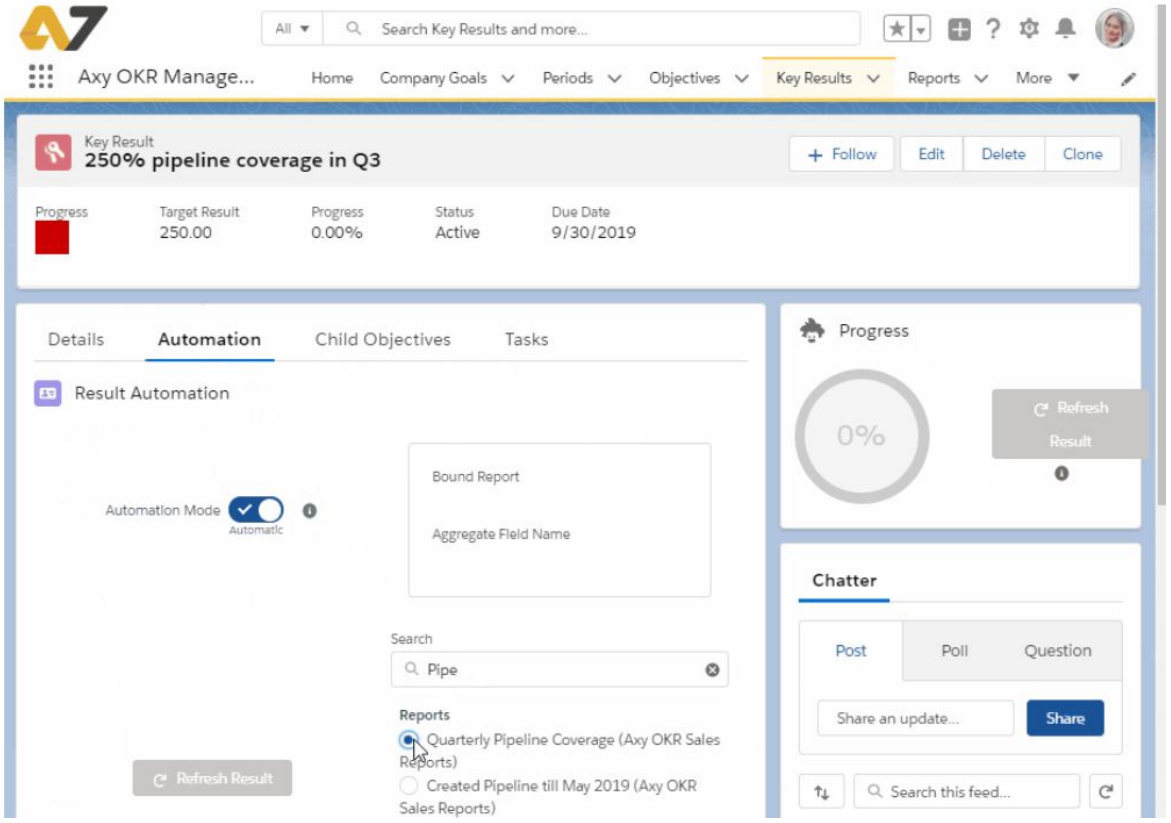
Go through the following steps to bind a report to a Key Result

1. Browse to any Key Result page
2. Click on ***Automation*** sub-tab
3. Toggle on the ***Automation Mode*** switch
4. ***Search the report*** you want to bind
5. Select the ***Aggregate Field*** of the report you want to use to track the Key Result
6. A success message will appear as Axy OKR is running the report and updating the result

In our example:

- Key Result Name: 250% Pipeline coverage in Q
- Bound report: Quarterly Pipeline Coverage
- Aggregate Field Name: Pipeline coverage

Important note: Axy OKR **runs the report using the objective's owner user**. This means that visibility sharing settings are applied, so the data gathered from the report is the correct one for every Key Result owner.

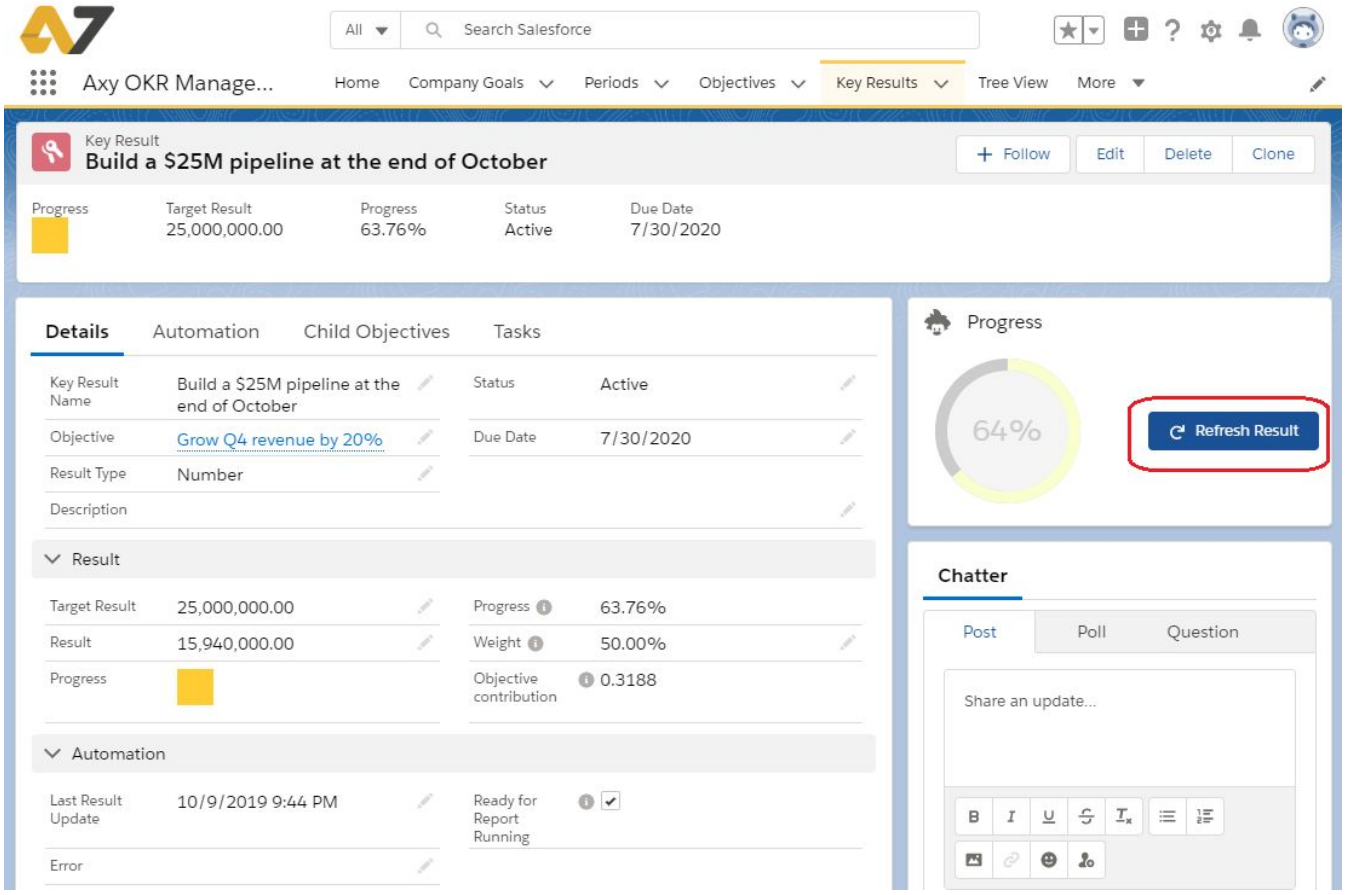


When and How bound reports are Refreshed

Axy OKR will refresh automatically each KRs with a bound report scheduling a job to run the report on behalf of the owner.

Axy OKR will schedule the jobs with the frequency defined in the ***Automation Interval in minutes*** field defined in the ***Axy OKR Setup*** tab in the **Automation** section.

Bound reports can be refreshed as well by pressing the ***Refresh Result*** button at any time in the Key Result main view. This will **only work for the owner of the OKR** or any other **Team member** if the **OKR is Team type**.



Check In and Pulse

The real value of OKRs is obtained when every individual and team is frequently tracking the progress of the Objective and the validity of the KRs. It's the only way to take corrective actions and modify the KRs when needed to get to the objective.

Adopting regular OKR check-ins requires constant push and team commitment. Weekly Check-ins are the most powerful tool to assure that OKR practice is delivering value.

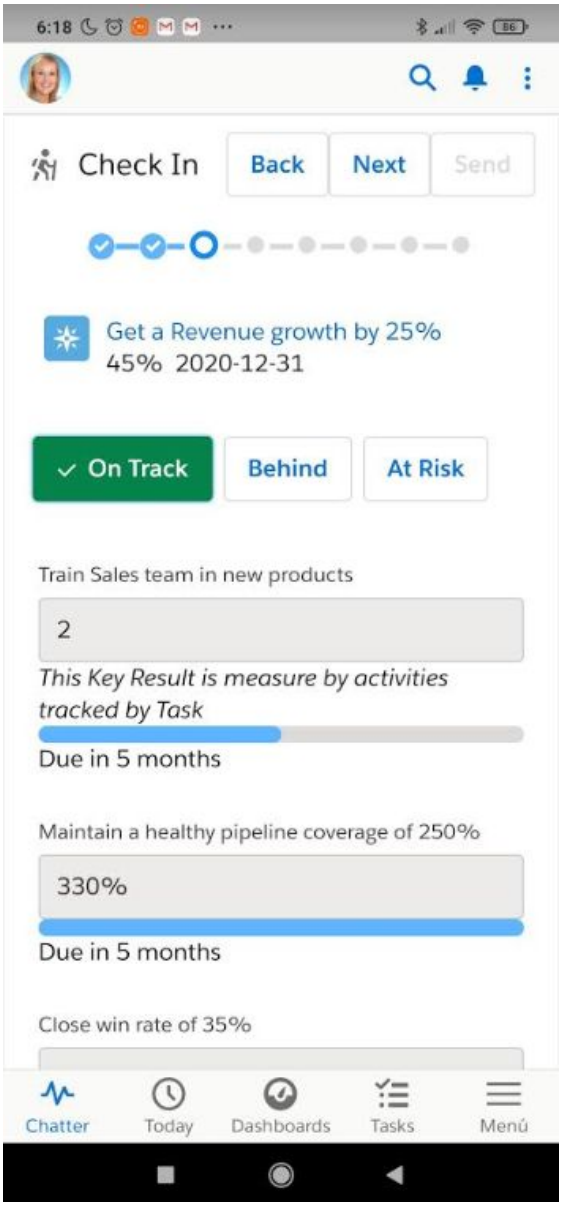
Axy OKR provides the way to kindly remember every user the need of checking and facilitates it through an easy wizard.

Every user will receive a **weekly notification in the Mobile App** to start the Check In if this notification is set (See Check In & Pulse setup in the Axy OKR setup section). When the user clicks on the Notification, the Check In wizard is launched.

The **Check In wizard** guides you all through your objectives. For each objective, you can easily:

- **Update any KR** manually. To help you track them, the progress bar and the days to due date are shown.
- **Review** any **automated KR**.
- Assess and **set** the Objective **Achievement status**.

The Check In wizard launches as well a **Pulse** score track. The user will value his/her mood on a scale from 1 to 5.



TREE VIEW

Using the Tree View

Alignment is key for organization success. For aligning OKRs, the **Tree View** is a powerful visual tool. You will be able to:

- See the **complete scheme** of OKRs **dependencies and contributions**.
- Find how **every objective owner is contributing to the parent OKR**
  - **Objective details and key results** are accessible by clicking on every box
- Navigate through the tree using the **filters** and **search boxes:**
  - Selecting the **root company goal**
  - **Filtering** by objective **achievement**
  - Showing **all** or only **your objectives**
  - Showing the **complete hierarchy** from the objectives, or a **number of tree levels**
  - **Searching** objectives by **name** or by **owner**
- Switch from a pure **Tree Hierarchy view** to a **Tab List view**, whatever is more convenient for you
- **Expand** and **collapse** the tree levels clicking on the “yellowed” OKRs boxes

A good practice to define and align objectives is to create them directly from the Tree View.

Tree view always shows by default (when you enter) the first three levels of OKRs.

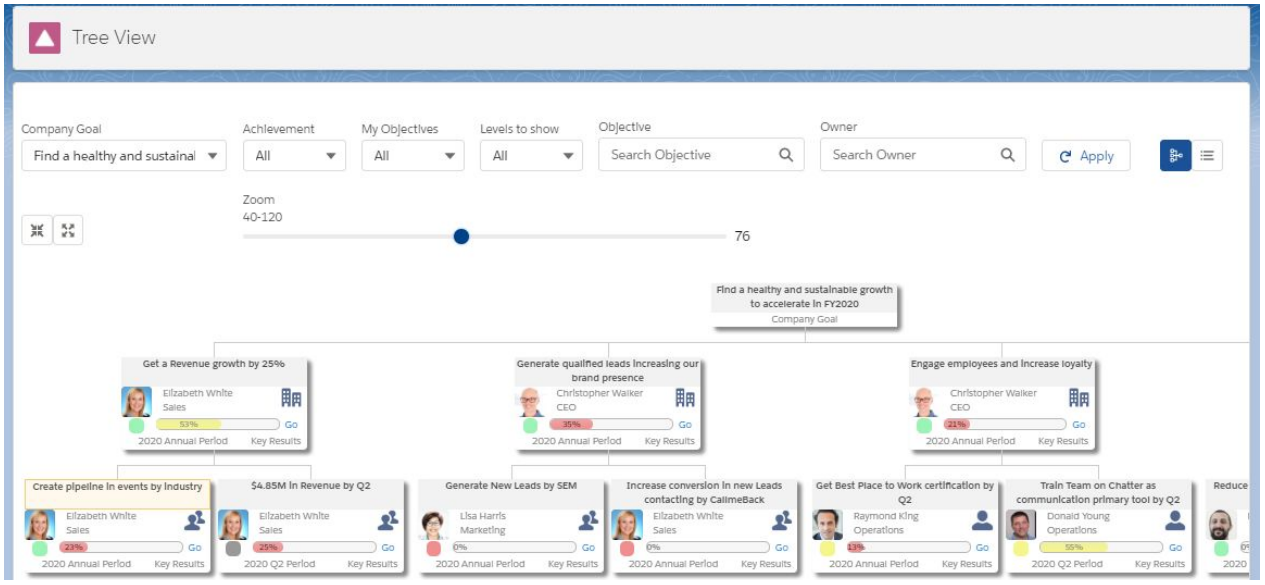
Important note: To **see any OKR in the Tree View** it has to be ***Active*** and ***Not Private.***

The two Views of the Tree

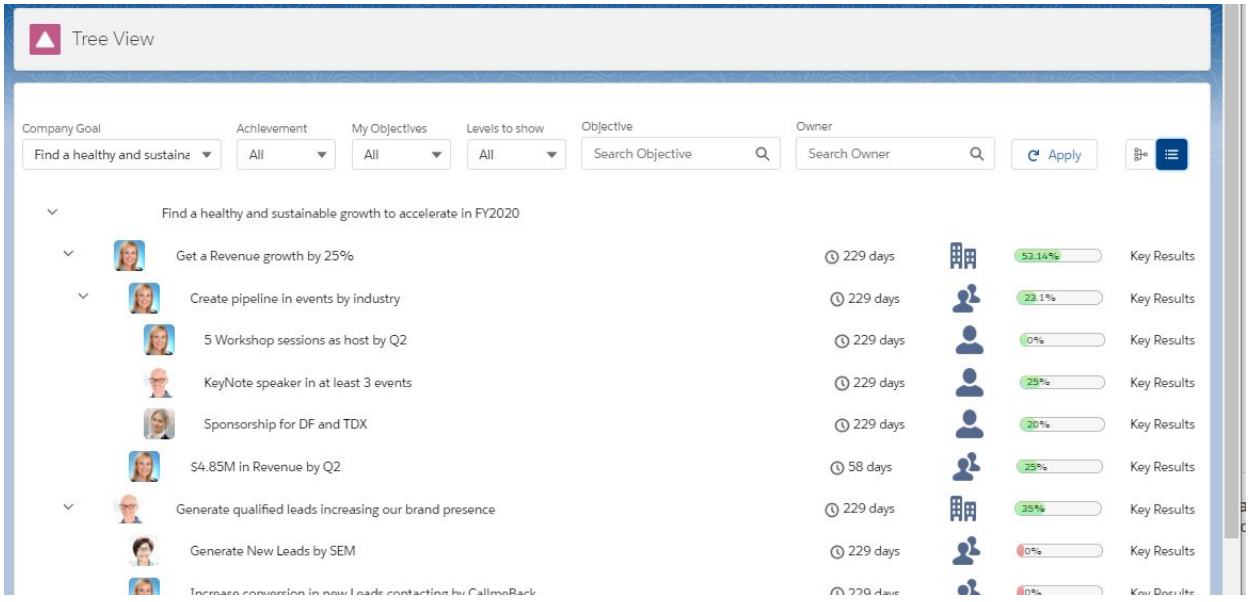
You have two different views to navigate through the tree:

- A graphic view with the objectives boxes joined with lines by their dependencies and contribution relationships: the **Tree Hierarchy view**
- A **Tab List view** where the contribution and relationships among objectives are ordered and showed with tabs

Tree Hierarchy view



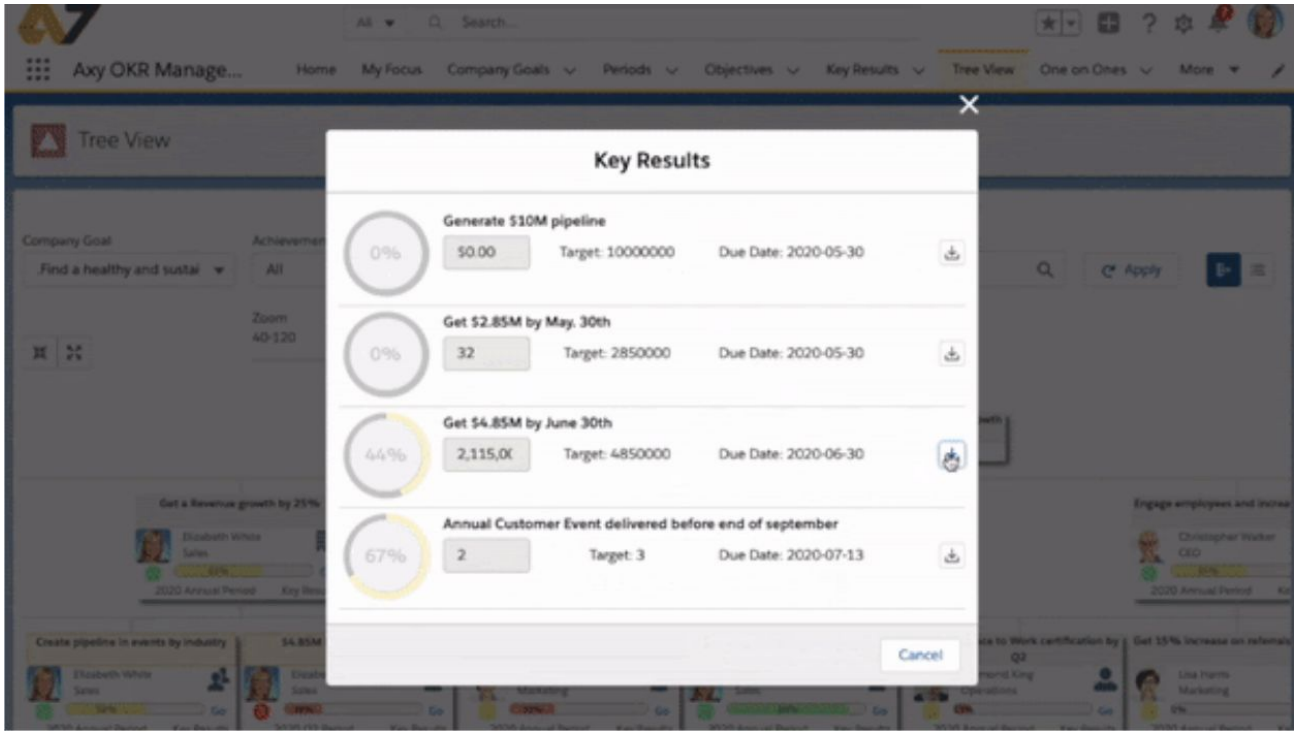
Tab List View



New Objective from Tree View

Go through the following steps to define an Objective

1. Navigate to ***Tree View*** tab
2. Look into the tree for the **Objective you want to contribute**, using the **Filters** and **Search boxes** (see deeper explanation on these filters below)
3. Click on the ***Key Results*** label in the objective box. A popup with the Key Results will appear
4. Choose the Key Result and click on the symbol to directly **convert** it **into an Objective**
5. A pop-up window with default information from the Key Result appears
6. Edit **Objective Name, Type, Status** and **Period** if needed and save
   a. Your new Objective Details page appears
7. Set yourself as the **Objective owner**



Filtered view of the Tree

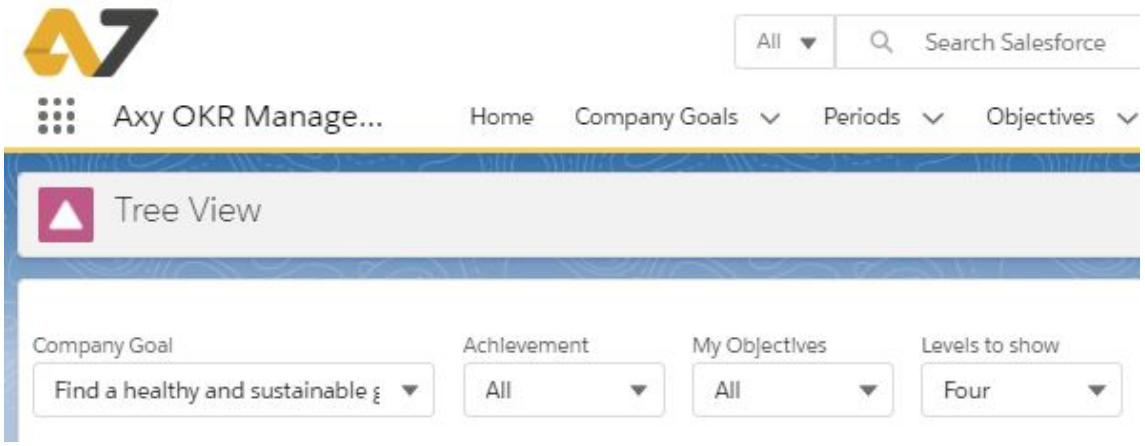
There is a powerful set of **filters** and **search boxes** in the Tree to help you navigate and go to the OKRs you want to review or manage.

Tree Filters

You have three main filters to help you focus on the objectives you want to review:

- **Company Goal filter**. With this you select the root company goal. You normally will have one only Company Goal, but some organizations can have several ones. As an example, the different business units of a multinational company can have different and isolated company goals
- **Achievement filter**. You can decide to see only the objectives **At Risk** or **On track…** or all of them
- **My Objectives filter**. With this filter, the tree will show **your objectives** only (**My objectives**) or **your objectives and all the objectives related to yours** in the levels behind (**My Hierarchy**).
- **Levels to show**. You will see the objectives and all the objectives that contribute to them up to the level number that you select.

These **four filters act combined**, presenting the objectives that meet ALL the selected conditions.

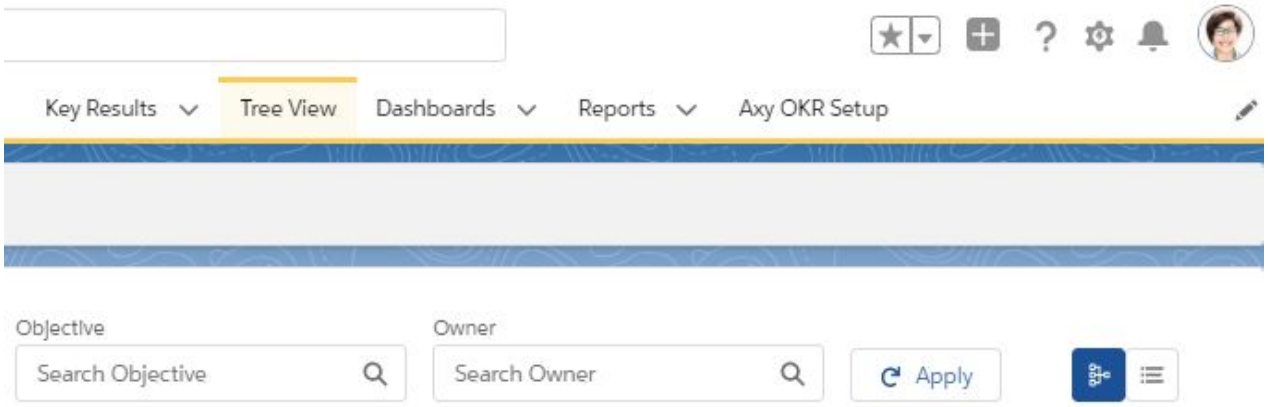


Tree Search Boxes

You have two search boxes to help you focus on the objectives you want to review:

- **Search Objective**. You can find a concrete objective searching by its name. You will see the fist five objectives matching your text, narrowing the results as you are writing, so you can select the right one.
- **Search Owner**. The tree will show only the objectives owned by the user you select.

When you use one of these search boxes, the **filters are applied with the exception of the My Objectives** one

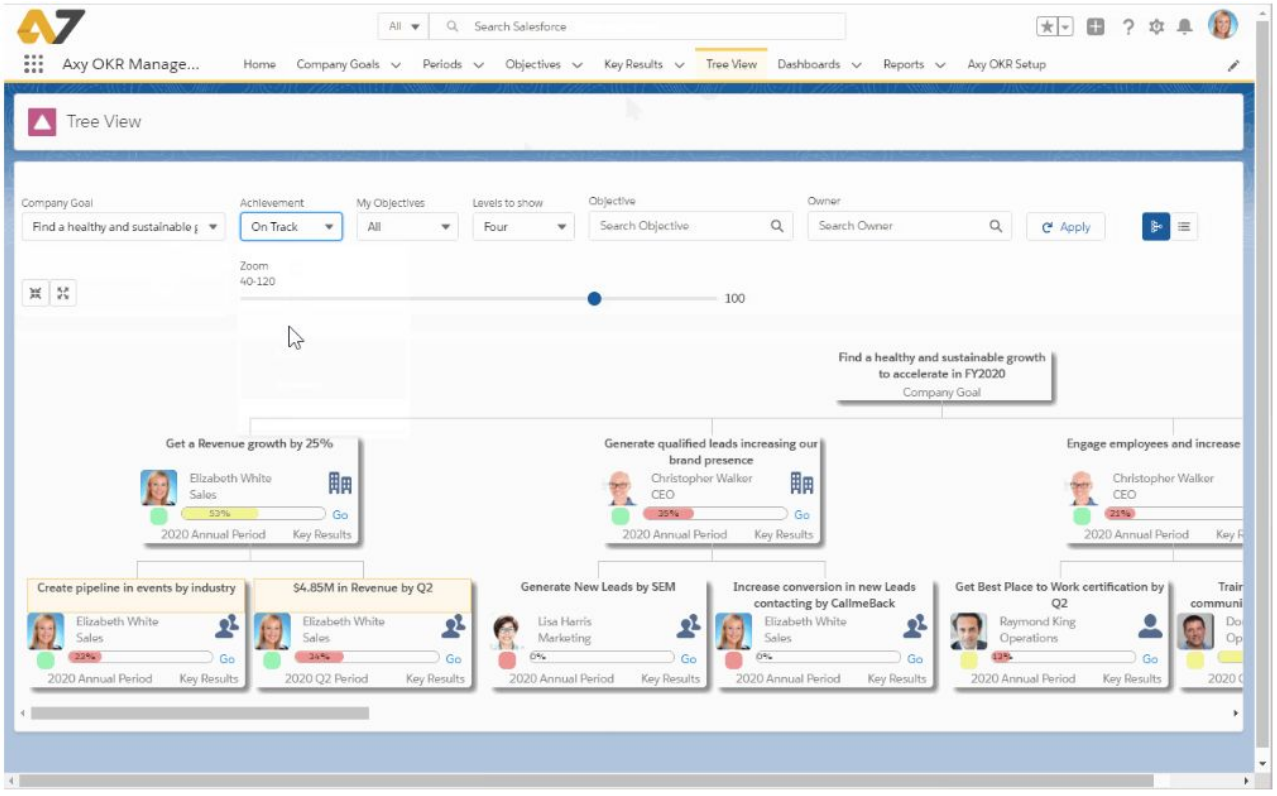


Navigating through the Tree

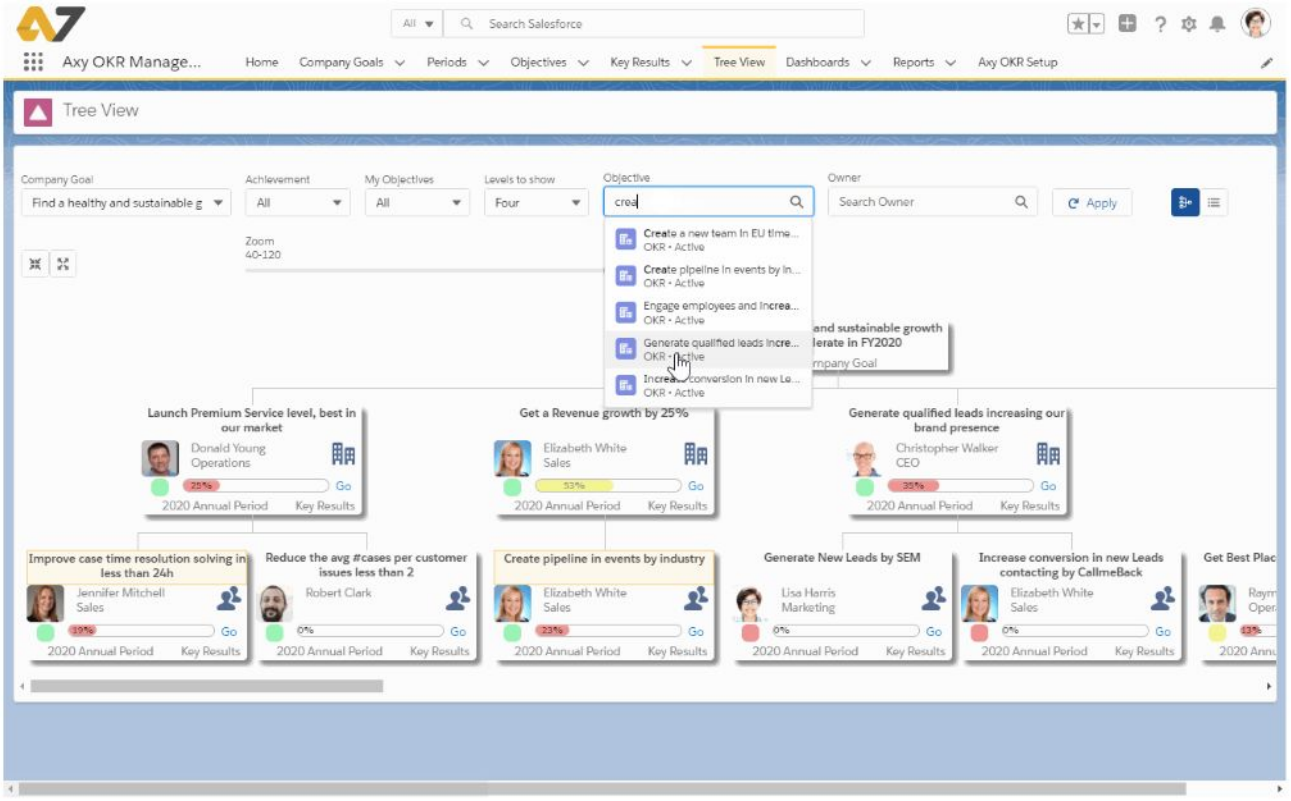
You can navigate the Tree using the filters and search boxes.

Let's see it with an example, **using the Filters**:

- Company goal: Find a healthy and sustainable growth to accelerate in FY2020
- Achievement: On Track
- My Objectives: All
- Levels to show: Five
- Objective: N/A
- Owner: N/A



Let's see another example, **using the Search Boxes** and playing with filters at the same time.



Note: When using the Objective search box or the Owner search box, the My Objectives filter is disabled

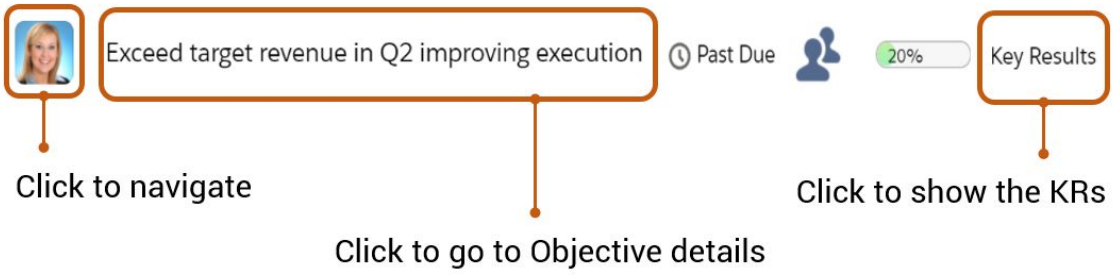
When Axy OKR displays the filtered OKRs, **those that do not meet with the conditions are shown in light gray.** This is to see clearly which are the ones you are looking for, but at the same time see where they are in the tree and how they contribute to others.

You can always navigate through the entire tree

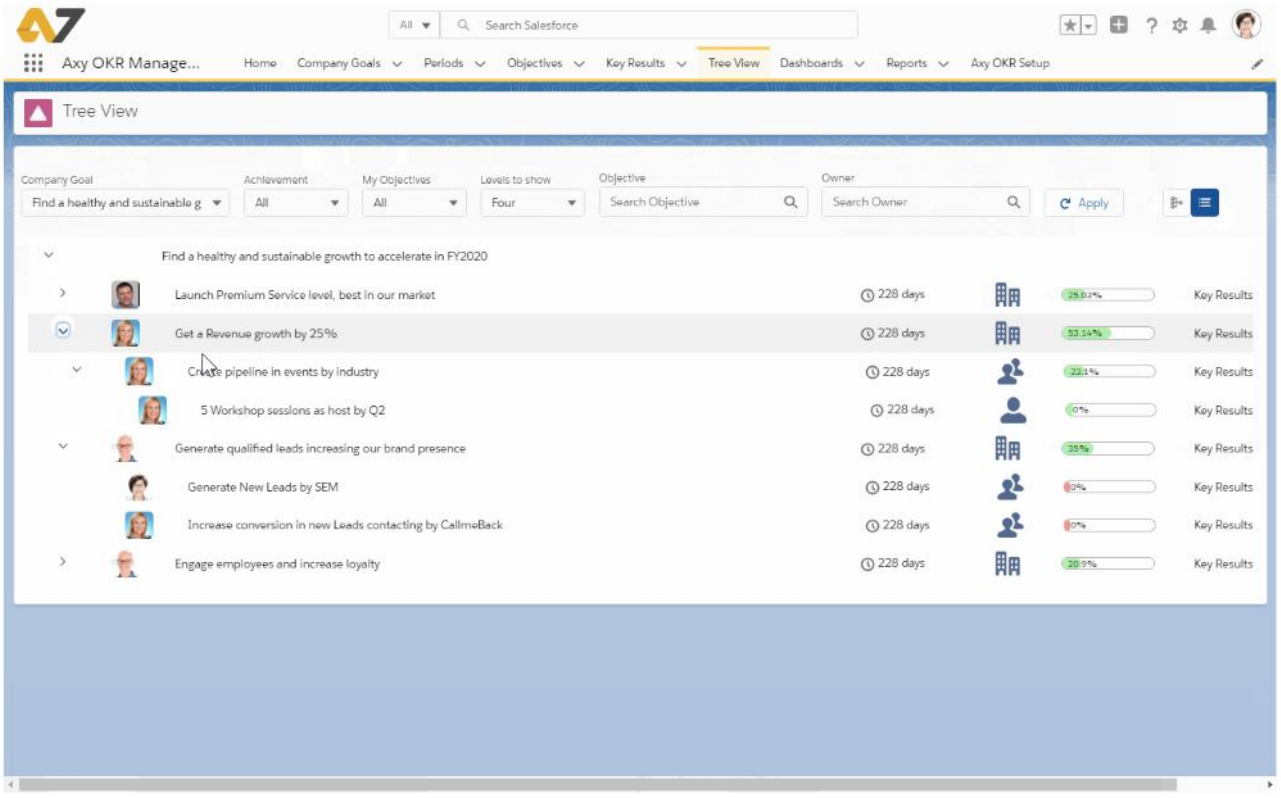
- **Changing from one view to another** using the buttons:

- In the **Tree view**, you can show and collapse the levels by clicking in the OKR box. When you see an **OKR box colored with yellow**, this means there are OKRs in the levels behind contributing to it.

- In the **Tab list view,** you can show and collapse the levels by clicking on the owner picture or on the tab symbols



- In this view, you can see the target end date. It will show Past Due (if this is the case) and hovering over the text will show the end date.
- Using the button to **Collapse everything** and start to navigate from the company goal
- **Expanding the whole tree** by clicking the button

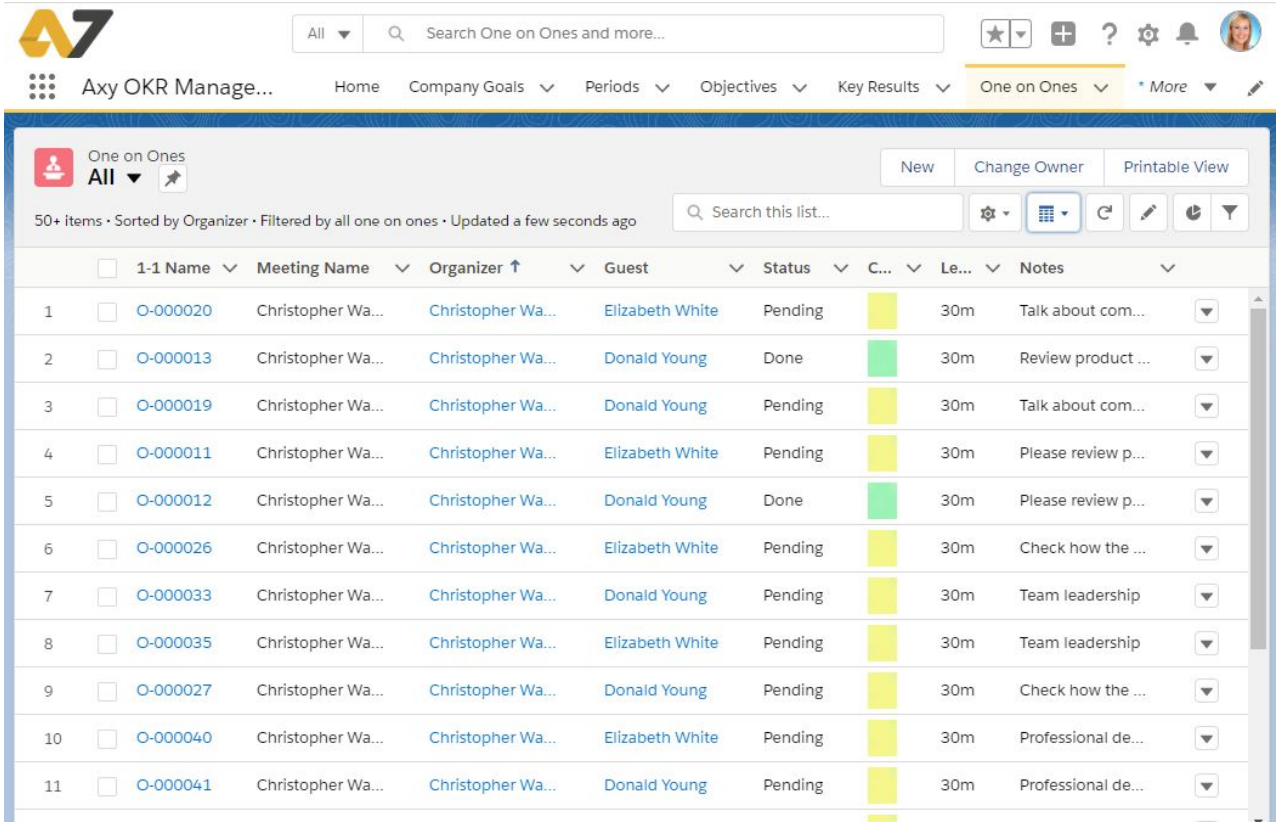

Axy OKR Manage...
Home
Company Goals
Periods
Objectives
Key Results
Tree View
Dashboards
Reports
Axy OKR Setup
Search Salesforce
Tree View
Company Goal
Find a healthy and sustainable g
Achievement
All
My Objectives
All
Levels to show
Four
Objective
Search Objective
Owner
Search Owner
Apply
Find a healthy and sustainable growth to accelerate in FY2020
Launch Premium Service level, best in our market
228 days
Key Results
Get a Revenue growth by 25%
228 days
53.14%
Key Results
Create pipeline in events by industry
228 days
22.1%
Key Results
5 Workshop sessions as host by Q2
228 days
0%
Key Results
Generate qualified leads increasing our brand presence
228 days
35%
Key Results
Generate New Leads by SEM
228 days
0%
Key Results
Increase conversion in new Leads contacting by CallmeBack
228 days
0%
Key Results
Engage employees and increase loyalty
228 days
20.9%
Key Results

ONE ON ONE MODULE

Using the One on One module

OKRs practice is based on communication. Communication to establish the objectives, to align through the organization and to be sure everyone is focused on them.

Probably the One on One meetings are the most powerful communication tool in an organization. Axy OKR helps users to handle those regular meetings with a complete **One on One module**



New One on One

Follow the next steps to define a One on One meeting

1. Navigate to ***One on Ones*** tab
2. Click on ***New***
3. Define **Guest, Organizer, Status, Length** of the meeting and optional **Notes**
4. Decide **Date** and **Time** for the One on One
5. Define the **Repeat** rule, weather you want make it recurring or not
6. Review what you have defined and save

In our example:

- Guest: Lisa Harris
- Organizer: Christopher Walker
- Status: Pending
- Repeat: One week after completed
- Length: 30 minutes
- Notes: Weekly One on One with Lisa

Note: One on One meeting owner is the one that creates the One on One. She/he can be the Organizer but not necessarily.

Talking Points

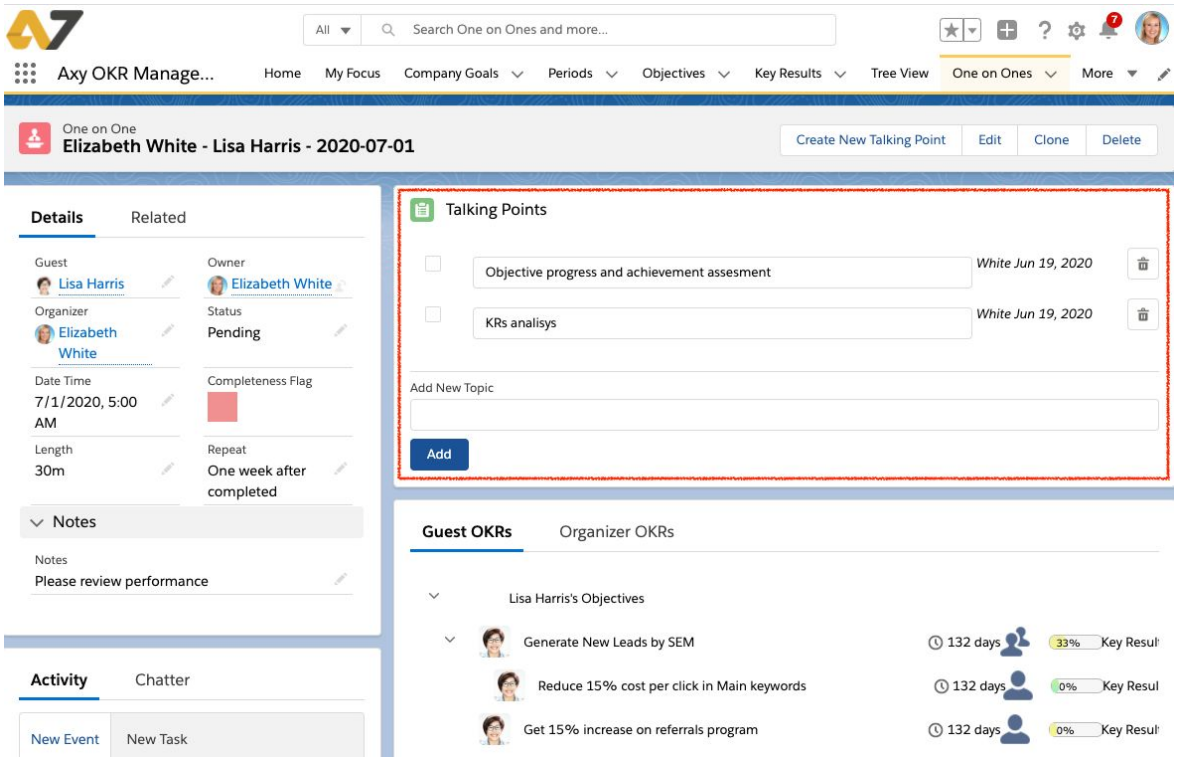
You should define the talking points of your One on One meeting. If you define several talking points in a recurring One on One, you will be sure that you review and discuss the main points in every meeting.

Defining a **Talking Point** when you are in the One on One page is quite simple

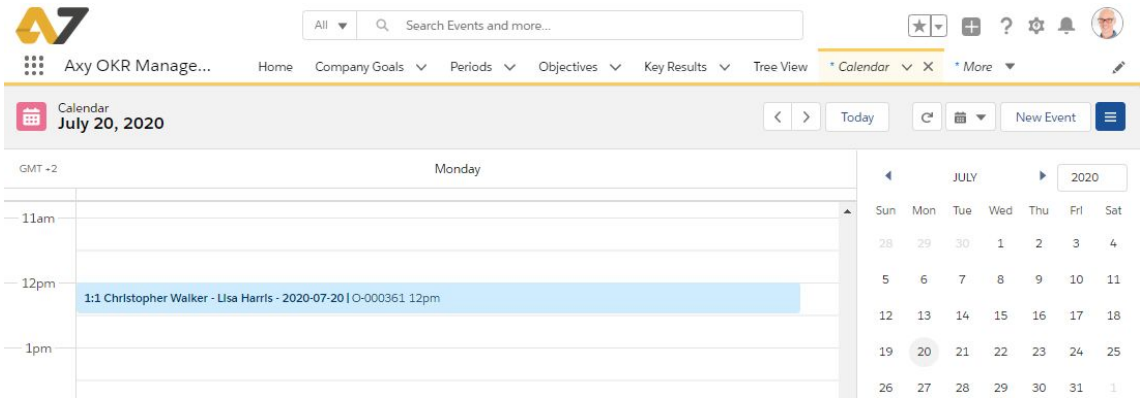
1. Go to the **Talking Points** frame and start writing your ***Topic***.
2. Click on ***Add*** when it is finished.

Repeat the process for every Talking point you want to define.

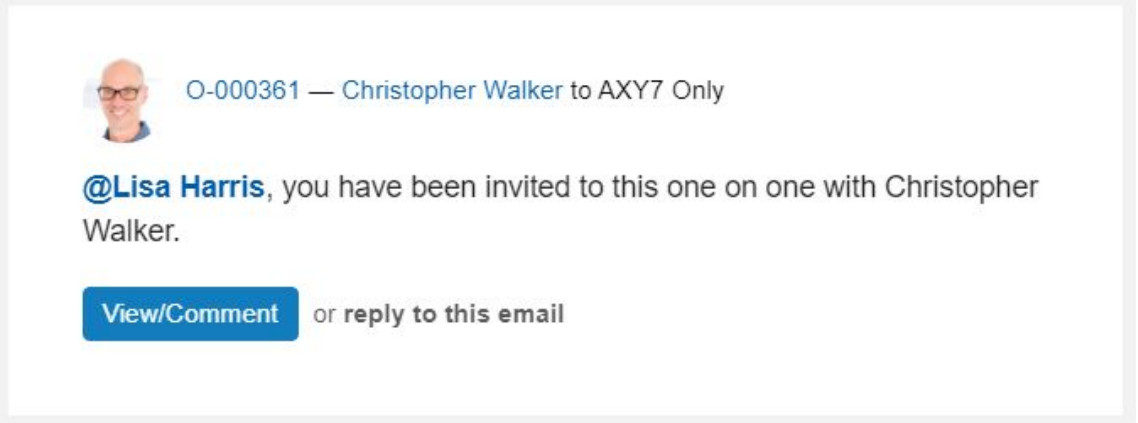
Talking points can be defined by both, the **Organizer** and the **Guest**. You can see, aside the topic, the person that has defined it.

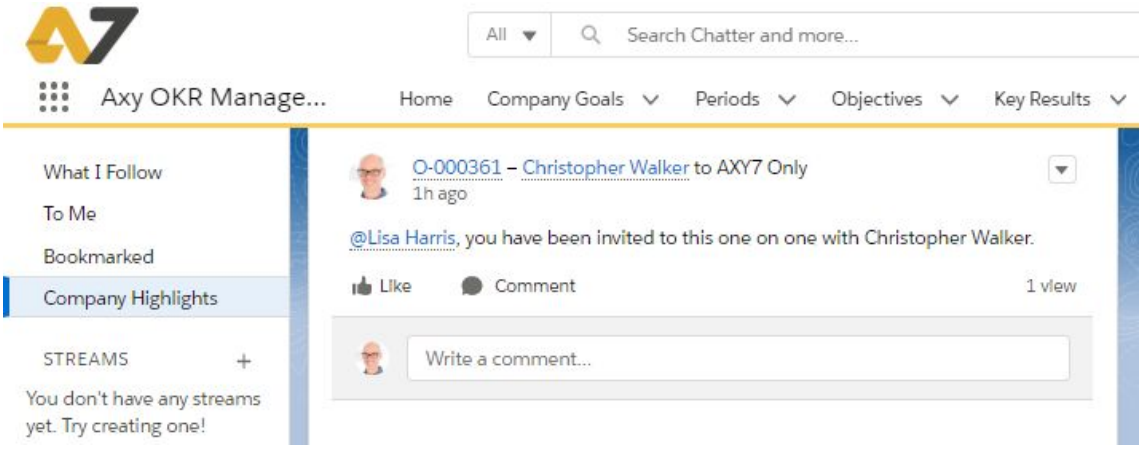


Axy OKR **creates automatically an event in the calendar** of both, Organizer and Guest, if ***Sync Calendar Event*** is checked in the Setup



Organizer and Guest will receive **emails and chatter notifications** of the One on One.

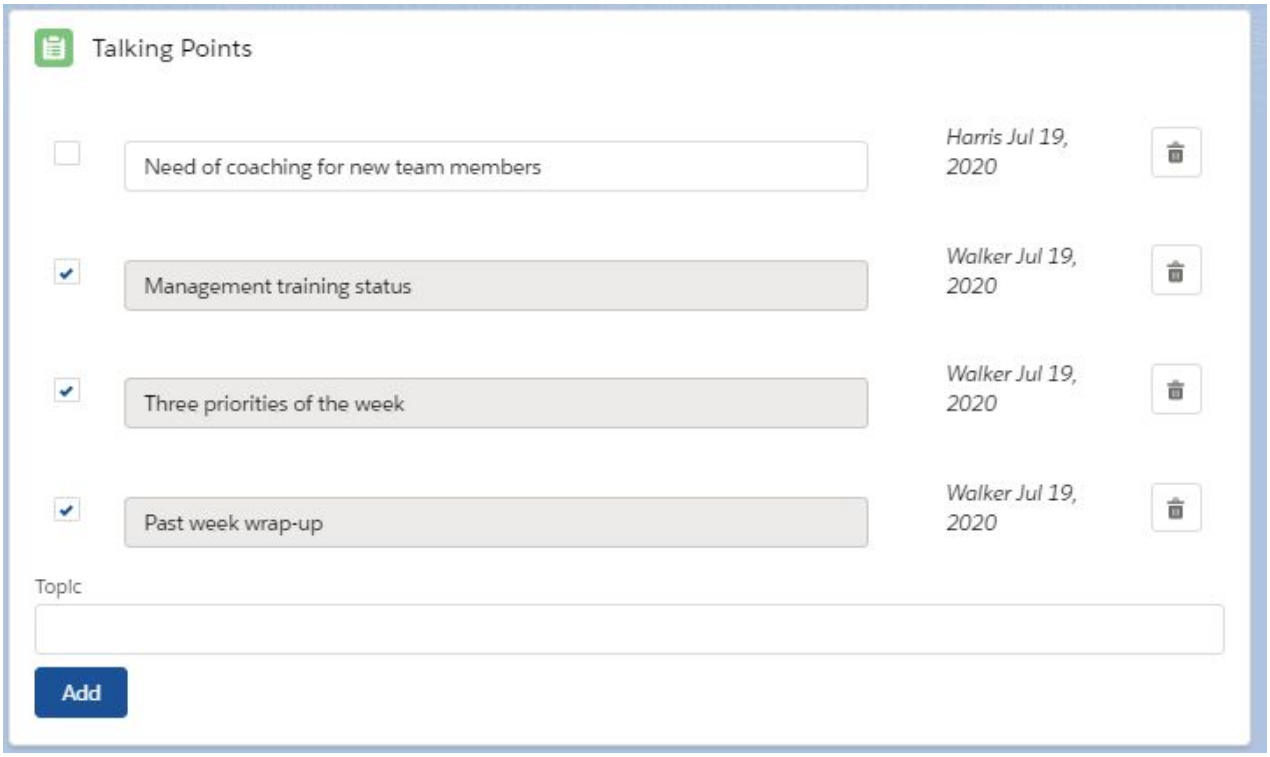




If a ***Repeat*** rule is applied, **Axy OKR will create a new One on One** anytime the previous meeting is marked as ***Done*** in the Status field.

Having the One on One

When you run the One on One meeting you will review the talking points, add others if needed, and mark the **checkbox** once you have gone through them.



If any **talking point is not** checked as **done** and you have marked the One on One as ***Done***, that **talking point is automatically moved to the next One on One** (If Repeat rule is applied).

As One on Ones are so important for organization and individuals success, Axy OKR provides a **dashboard and a set of reports** to manage and drill down the One on Ones.

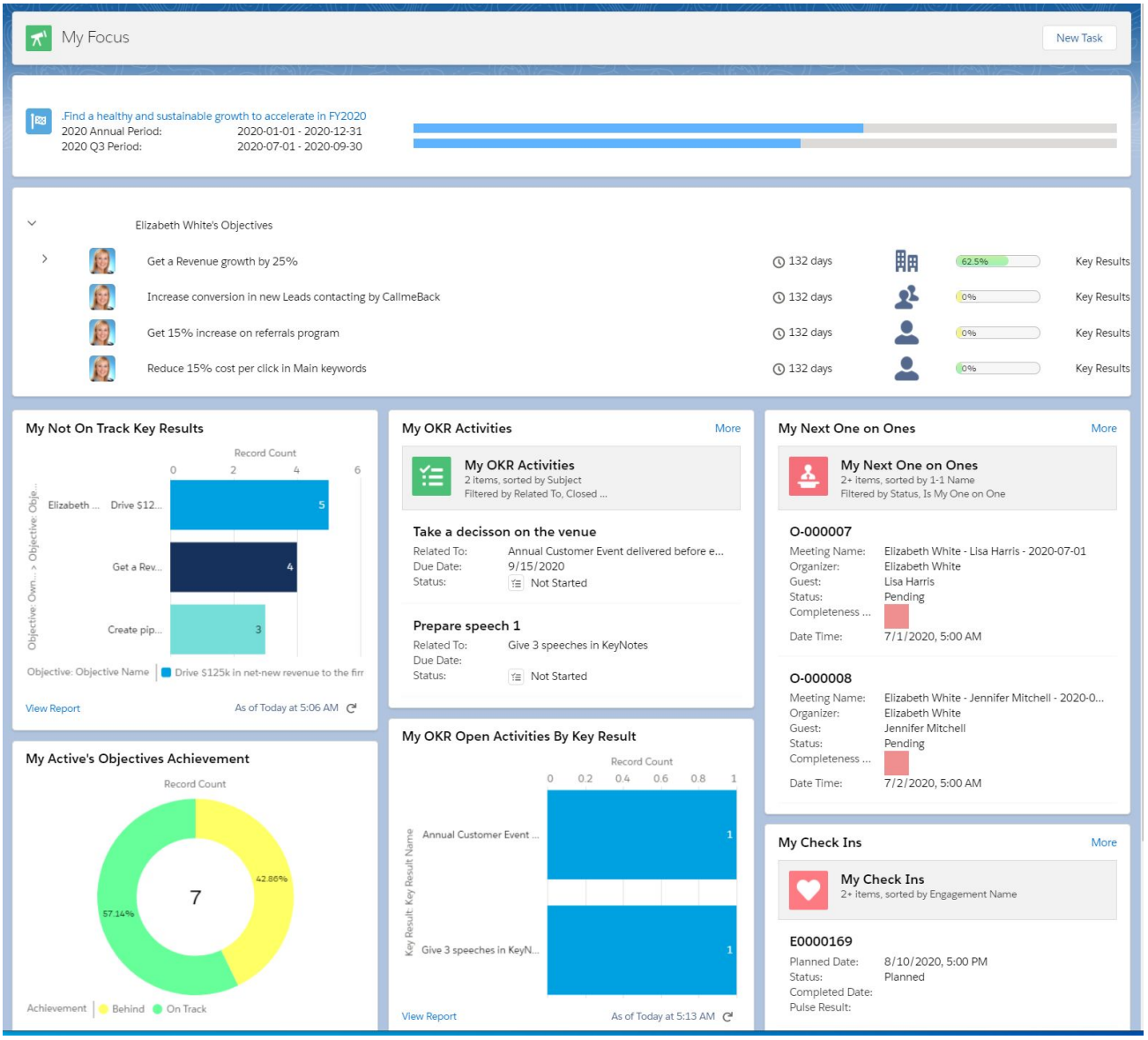
My Focus

In Axy OKR, the **My Focus** view summarizes the most important information for the user with regards to determining what's most important. This is done by referring to the company strategy and quarterly goals, as well as by showing the planned activities and One on Ones for the week.

This module is designed to be the entry page for the user, providing all the information needed to quickly know their OKR statuses and priorities. Here are the features that you'll find.

- **Strategic view**. Company Goal and active Periods progress. Users can easily see how much time is left in the active periods to complete their OKRs. This helps to prioritize their focus and activities.
- **Tactic View**. My Active OKRs view. How is the user performing against her/his OKRs.
- **Activity & Focus**
    - New Reports section for **Not on Track Key Results** and **OKRs Achievement** status - where the **users have to focus** their efforts.
    - **My Open Activities** - a list of pending tasks.
    - Report on **pending tasks by KR** - What the **user has to do** to progress the KRs.
- **Engagement**
    - **My Next One on Ones** - a list of the next One on Ones scheduled for the user.
    - Overview of the **last two Check-Ins** with planned date, status, completion date, and pulse result.

Below we can see a general view of the My Focus module. Let's go in more depth through every section.


My Focus
New Task
.Find a healthy and sustainable growth to accelerate in FY2020
2020 Annual Period: 2020-01-01 - 2020-12-31
2020 Q3 Period: 2020-07-01 - 2020-09-30
Elizabeth White's Objectives
Get a Revenue growth by 25%
132 days
62.5%
Key Results
Increase conversion in new Leads contacting by CallmeBack
132 days
0%
Key Results
Get 15% increase on referrals program
132 days
0%
Key Results
Reduce 15% cost per click in Main keywords
132 days
0%
Key Results
My Not On Track Key Results
Record Count
0
2
4
6
Objective: Obje... > Objective: Own...
Elizabeth ... Drive $12...
5
Get a Rev...
4
Create pip...
3
Objective: Objective Name
Drive $125k in net-new revenue to the firr
View Report
As of Today at 5:06 AM
My OKR Activities
More
My OKR Activities
2 items, sorted by Subject
Filtered by Related To, Closed ...
Take a decisson on the venue
Related To: Annual Customer Event delivered before e...
Due Date: 9/15/2020
Status: Not Started
Prepare speech 1
Related To: Give 3 speeches in KeyNotes
Due Date:
Status: Not Started
My Next One on Ones
More
My Next One on Ones
2+ items, sorted by 1-1 Name
Filtered by Status, Is My One on One
O-000007
Meeting Name: Elizabeth White - Lisa Harris - 2020-07-01
Organizer: Elizabeth White
Guest: Lisa Harris
Status: Pending
Completeness ...
Date Time: 7/1/2020, 5:00 AM
O-000008
Meeting Name: Elizabeth White - Jennifer Mitchell - 2020-0...
Organizer: Elizabeth White
Guest: Jennifer Mitchell
Status: Pending
Completeness ...
Date Time: 7/2/2020, 5:00 AM
My Active's Objectives Achievement
Record Count
7
42.86%
57.14%
Achievement
Behind
On Track
My OKR Open Activities By Key Result
Record Count
0
0.2
0.4
0.6
0.8
1
Key Result: Key Result Name
Annual Customer Event ...
1
Give 3 speeches in KeyN...
1
View Report
As of Today at 5:13 AM
My Check Ins
More
My Check Ins
2+ items, sorted by Engagement Name
E0000169
Planned Date: 8/10/2020, 5:00 PM
Status: Planned
Completed Date:
Pulse Result:

Strategic and tactic view. "*WHY I have my OKRs*"

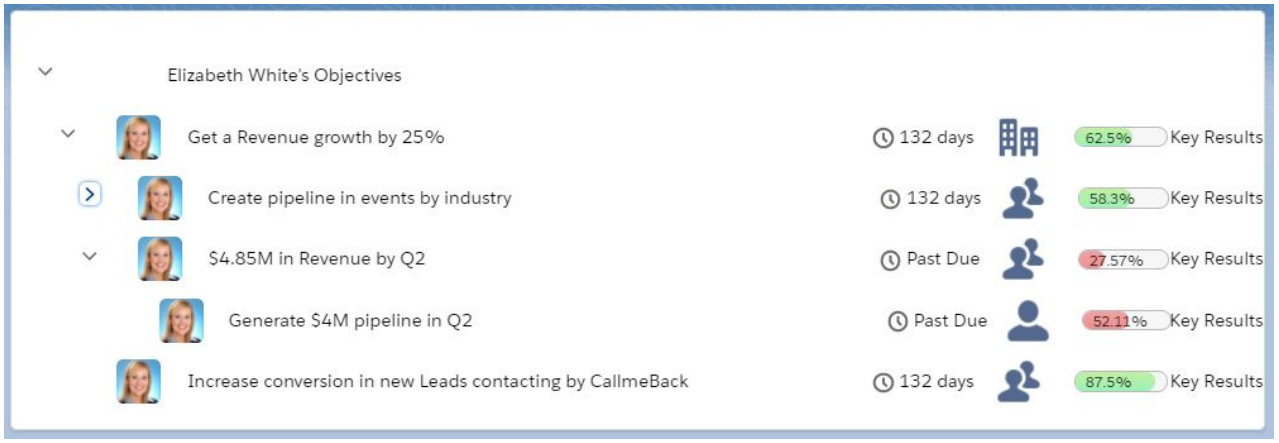
Every user needs to have the context of what they are working on to better collaborate with the common goal. That's what this section is presenting to the user.

Company Goal and Active Periods

Users see the Company Goal and how they are contributing to it with their daily efforts. It makes it easy to view how much time is left in the active periods to achieve the OKRs..

Active OKRs

This section presents the **user´s active OKRs**. It shows the progress of every Objective as well as the days left until they are due, and allows the user to navigate to the Key Results by clicking on them, just like in the Tree View.



Focus. *“WHERE I have to put my effort”*.

Once users have a good overview of their OKRs, it is important to highlight the OKRs that require the most attention due to being behind schedule. Both the Key Results progress and Objective achievement are shown in this section to help decide where to focus their efforts.

My Not On Track Key Results

A report presents those KRs that have a progress lower than 70%. If we are at the start of the period, most of them will be here, which is normal. But as time passes, the **user will see which KRs have to be given special attention**, letting them know that they need to focus their efforts and take corrective actions.

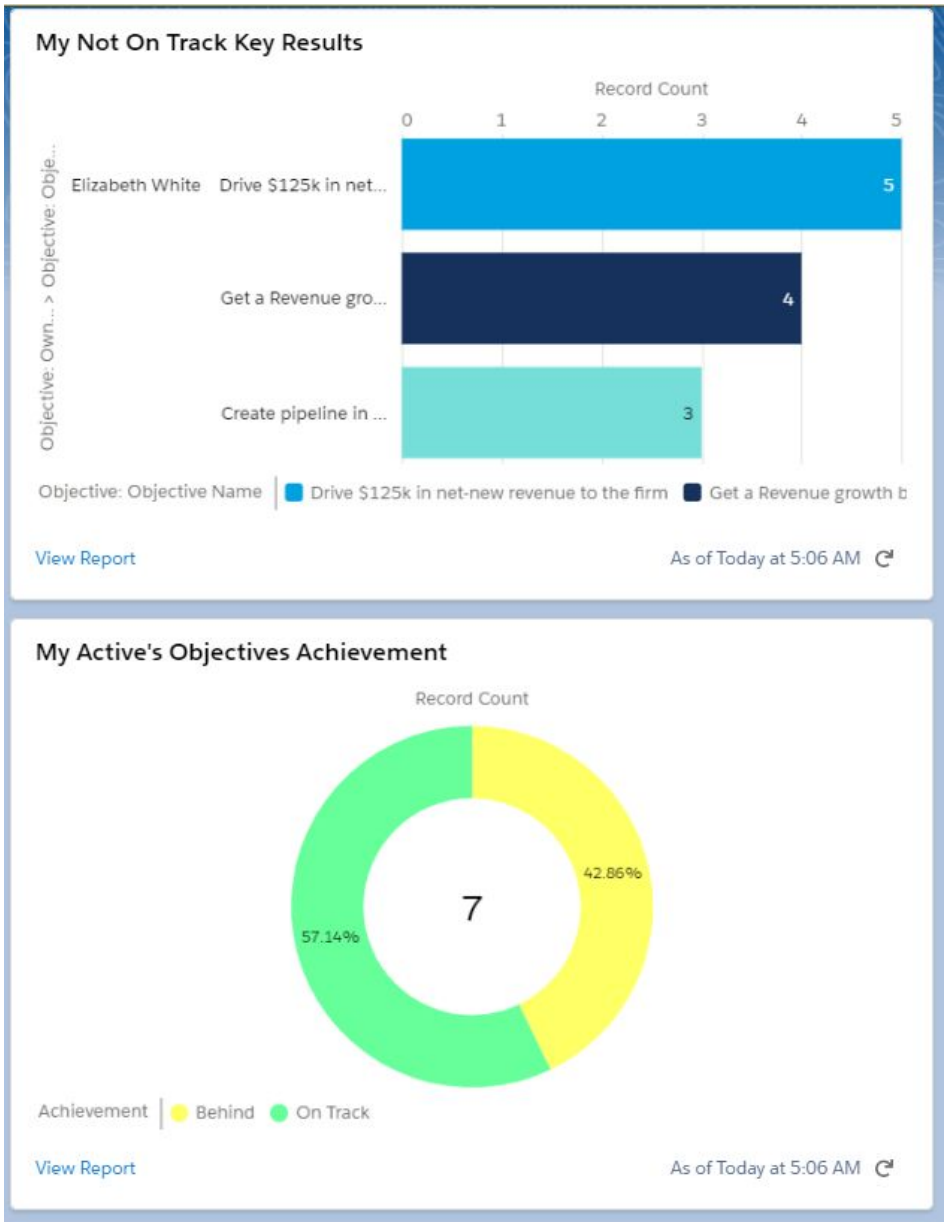
Note: To see the latest data, it is necessary to refresh the report by clicking on

My Active Objectives Achievement

This report shows the Achievement status of the user´s Objectives. This is another way to get the user’s **attention on their high priority objectives such as the ones that are behind schedule, indicated by the Yellow and Red colors**.

Note: To see the latest data, it is necessary to refresh the report by clicking on

In both reports, users can click on the View Report label to go to the OKRs they want to review in detail.


My Not On Track Key Results
Record Count
0
1
2
3
4
5
Objective: Own... > Objective: Obje...
Elizabeth White
Drive $125k in net...
Get a Revenue gro...
Create pipeline in ...
5
4
3
Objective: Objective Name
Drive $125k in net-new revenue to the firm
Get a Revenue growth b
View Report
As of Today at 5:06 AM
My Active's Objectives Achievement
Record Count
42.86%
7
57.14%
Achievement
Behind
On Track
View Report
As of Today at 5:06 AM

Activity. *“WHAT I have to do now”*.

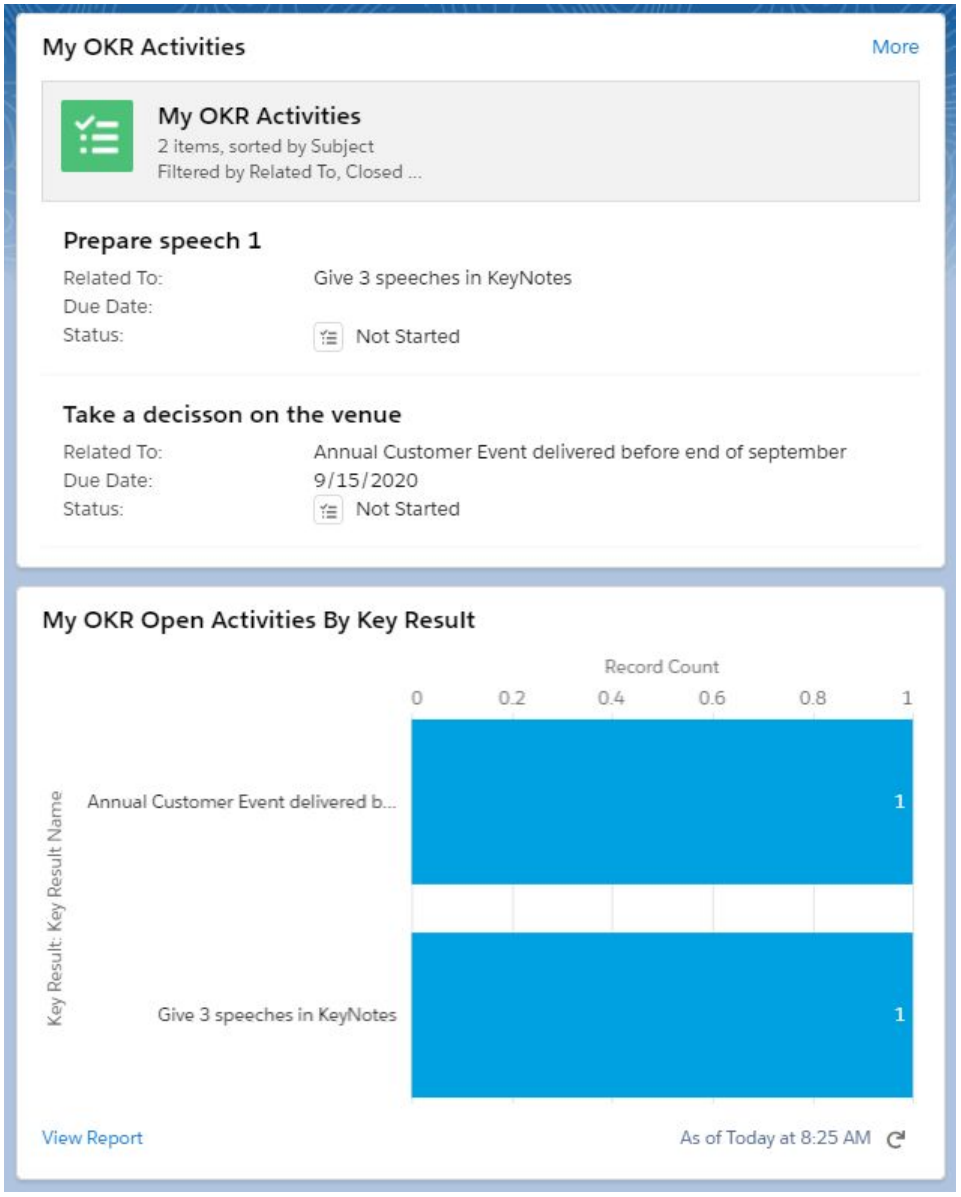
Now that the user has determined which OKRs are top priority as per the Focus section, the next thing they need to know is what activities and tasks are needed to advance them.

My OKR Activities

This section shows two views of the OKR activities that the user has planned to take on:

- One view with **every open or planned activity in the period**, including the ones related to the OKRs. The user can go directly to the Activity shown in the screen or look for others by clicking in More.
- A report with the **open activities per each Key Result**. With this report the user can navigate through each of the activities clicking in View Report

Note: To see the latest data, it is necessary to refresh the report by clicking on


My OKR Activities
More
My OKR Activities
2 items, sorted by Subject
Filtered by Related To, Closed ...
Prepare speech 1
Related To: Give 3 speeches in KeyNotes
Due Date:
Status: Not Started
Take a decisson on the venue
Related To: Annual Customer Event delivered before end of september
Due Date: 9/15/2020
Status: Not Started
My OKR Open Activities By Key Result
Record Count
0
0.2
0.4
0.6
0.8
1
Key Result: Key Result Name
Annual Customer Event delivered b...
1
Give 3 speeches in KeyNotes
1
View Report
As of Today at 8:25 AM

Engagement. *“Am I ALIGNED and COMMITTED with the team”*.

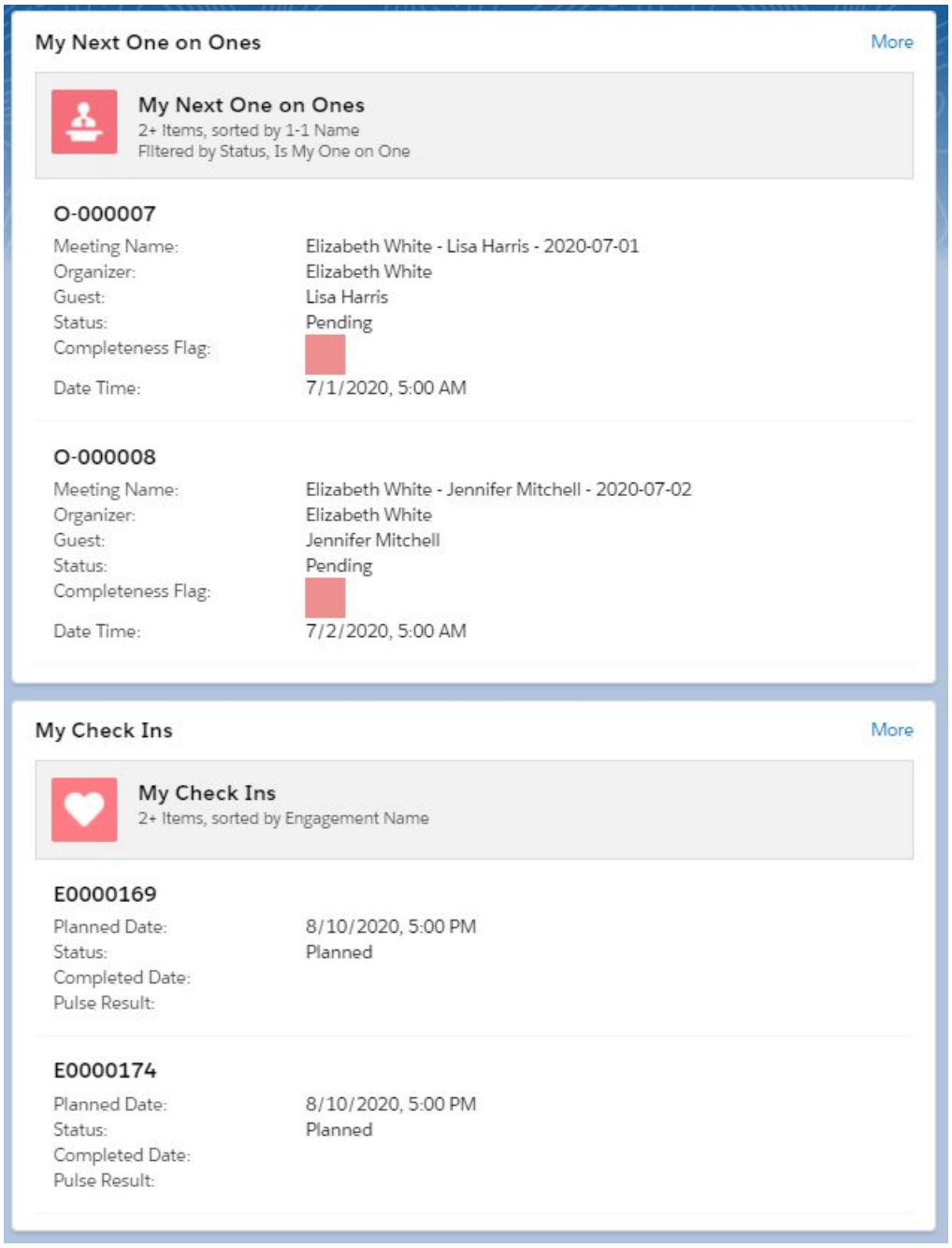
This section of My Focus presents the One on Ones and the Check-In pending instances.

- **My Next One on Ones**: a list of the next One on Ones for the user. Who the user is scheduled to meet with and for what topics the user has to review and act upon. These are usually done with their managers but can be done with anyone. One on Ones help ALIGN with managers, teammates, and anyone else that users are working with to achieve their OKRs.

  The user can go directly to the One on One shown in the screen or look for others by clicking in More.

- A quick view of the **last two Check-Ins** with their planned dates, statuses, completion dates, and pulse results. This section shows users are reviewing their OKRs regularly. A good Check-In culture is essential for effective OKR execution. Checking in on the OKRs regularly shows that the user is COMMITTED.

  The user can go directly to the Check-In shown in the screen or look for others by clicking in More.


My Next One on Ones
More
My Next One on Ones
2+ Items, sorted by 1-1 Name
Filtered by Status, Is My One on One
O-000007
Meeting Name: Elizabeth White - Lisa Harris - 2020-07-01
Organizer: Elizabeth White
Guest: Lisa Harris
Status: Pending
Completeness Flag:
Date Time: 7/1/2020, 5:00 AM
O-000008
Meeting Name: Elizabeth White - Jennifer Mitchell - 2020-07-02
Organizer: Elizabeth White
Guest: Jennifer Mitchell
Status: Pending
Completeness Flag:
Date Time: 7/2/2020, 5:00 AM
My Check Ins
More
My Check Ins
2+ Items, sorted by Engagement Name
E0000169
Planned Date: 8/10/2020, 5:00 PM
Status: Planned
Completed Date:
Pulse Result:
E0000174
Planned Date: 8/10/2020, 5:00 PM
Status: Planned
Completed Date:
Pulse Result:

Axy OKR DASHBOARDS

Managing OKRs evolution

OKR methodology success depends very much on continuous management, planning, executing and wrapping up, and then starting again.

Axy OKR provides a complete set of reports and dashboards to facilitate the adoption and the management of OKRs for every phase and stage.

Dashboard Filters

Axy OKR has a dashboard for each cycle of OKR management:

- Planning
- Execution
- Wrap-Up

In each of these dashboards you will see several reports, all related to a set of OKRs. Axy OKR decides the Objectives shown on each dashboard by filtering if they are in Planning, Execution and/or Wrap Up cycles

To calculate this, the systems uses the **current date** and the **Objective Start and End dates**:

- An objective is in **Planning** if the current date is within the Planning Cycle and between Objective Start and End Date
- An objective is in **Execution** if the current date is within the Execution Cycle and between Objective Start and End Date
- An objective is in **Wrap-Up** if the current date is within the Planning Cycle and between Objective Start and End Date

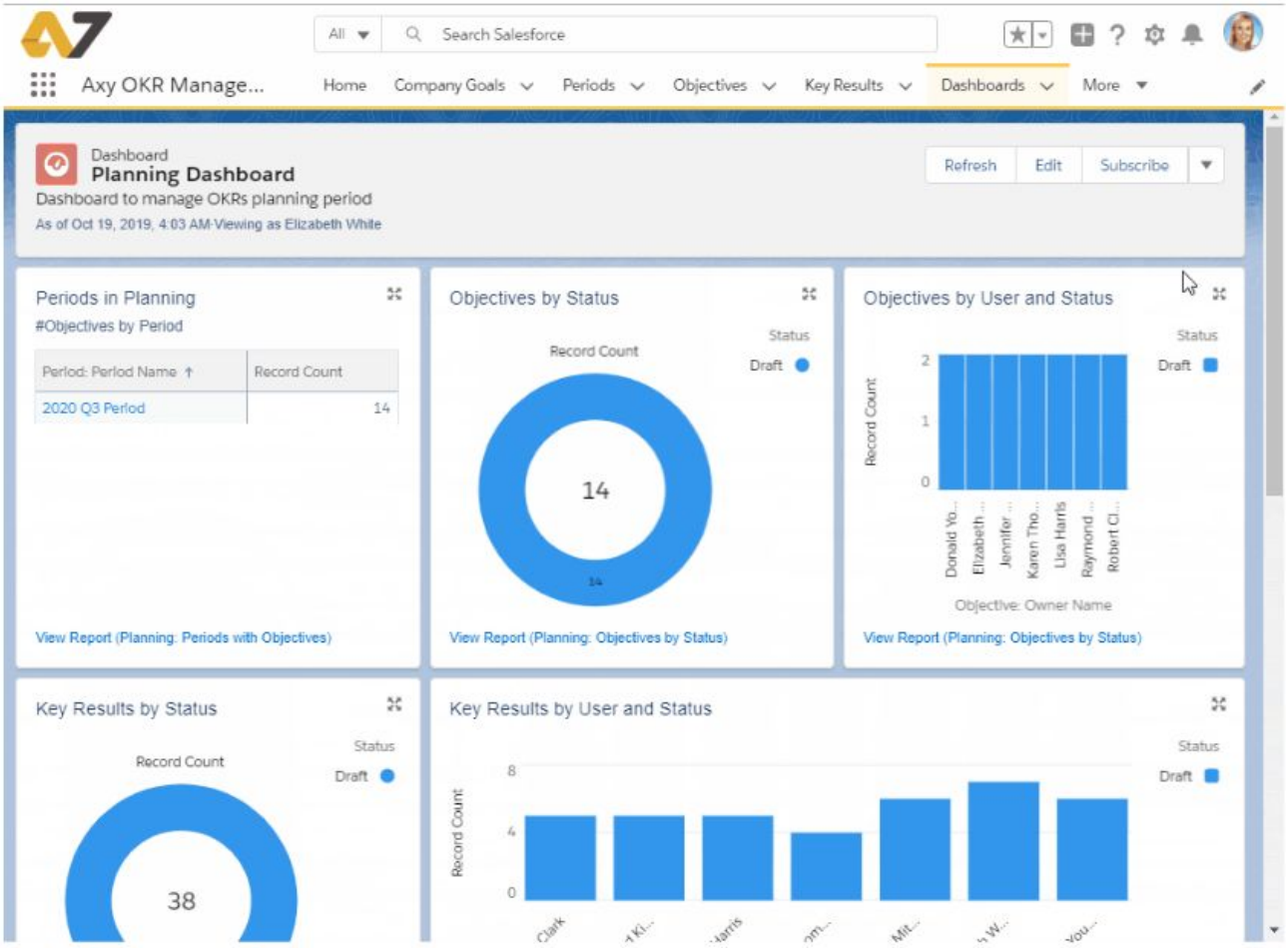
Planning Dashboard

In the Planning cycle, you want to make sure everything is ready to start execution. Planning dashboard shows to you:

- **Periods in Planning Cycle**. Usually the following quarter
- **Objectives by Status**. How the organization is progressing on objectives definition and approvals
- **Objectives by User and Status**. How everyone is progressing on objectives definition and approvals
- **Key Results by Status**. How the organization is progressing on Key Results definition and approvals
- **Key Results by User and Status**. How everyone is progressing on Key Results definition and approvals
- **Automatic vs Manual Key Results.** How “automated” is your OKR structure
- **Automatic vs Manual Key Results, by User.** In percentage.
- **Users with objectives with more than 3 KRs**. Having more than 3 Key Results in an objective can imply you are not focusing on the important levers for your objective. This is only a “common sense” rule. But if most of the objectives have more than 3 KRs, you probably need to review some of them.
- **Users with objectives with less than 3 KRs**. To be sure that everyone applies OKR best practice of having at least 3 KRs per objective. Or investigate if they have a reason for that.
- **# Objectives by user.** How many objectives has every user. Three on average is good practice.

Go through the following steps to access to Planning Dashboard

1. Navigate to ***Dashboard*** tab
2. Go to ***Planning OKR Dashboard*** *in* ***Axy OKRs Dashboards folder***
3. Refresh it and browse



Execution Dashboard

When you are in execution you should review every two weeks how the organization is progressing towards the OKRs. You can not wait till the last moment to see if you, your team or the organization are in the good direction.

OKRs should be flexible, and if any of them is not working, you should decide to change it even before the period ends.

Axy OKR provides a set of reports in the Execution Dashboard that allows you to detect the OKRs progress, and take action on it.

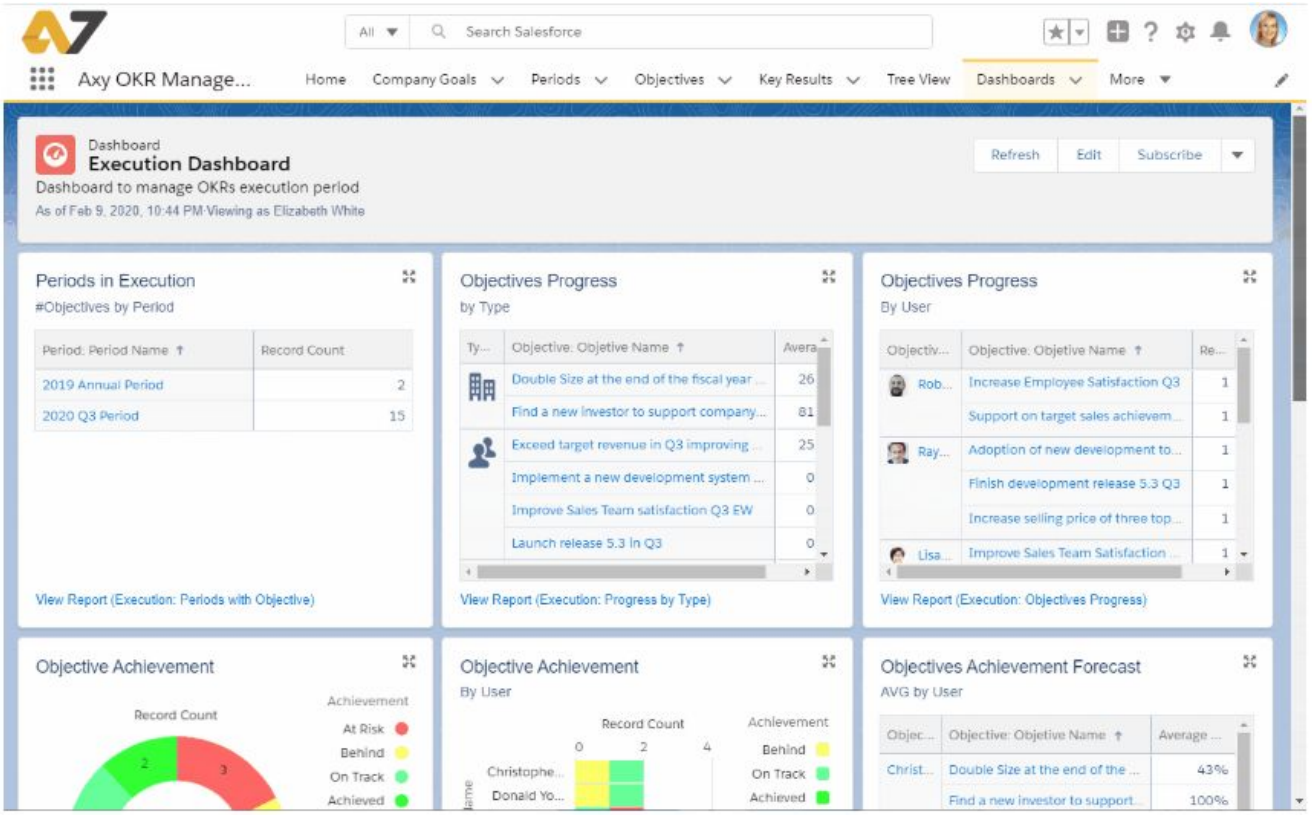
Execution dashboard shows to you:

- **Periods in Execution Phase**. Usually the actual quarter and the year
- **Objectives Progress by Type.** It shows the percentage of objective progress per type: Company, Teams, and Individuals
- **Objectives Progress by User**. It shows the percentage of objective progress per user.
- **Objectives achievement.** Displays the number of objectives per achievement level: At risk, Behind, On Track or Achieved
- **Objectives achievement by User.** Displays the number of objectives per achievement level and by user.
- **Objectives achievement forecast**. Axy OKR calculates achievement forecasts based on Time Progress and Objective Progress. This report helps to focus on those objectives that probably will not be accomplished, so corrective actions should be taken.
- **# Not On Track Key Results by user**. You can see the users with the number of Key Results they have not on track.
- **Key Results Achieved by Period**. The number of already achieved and not yet achieved
- **Objectives with Overdue Date**. Tracking of objectives with a past due date
- **Objectives progress by user**. Showing the objectives progress evolution classified by type (Company, Team and Individual) and users.

Go through the following steps to access to Execution Dashboard

1. Navigate to ***Dashboard*** tab

2. Go to ***Execution OKR Dashboard*** *in* ***Axy OKRs Dashboards folder***
3. Refresh it and browse



Wrap-Up Dashboard

Wrap-Up is probably the most important phase of the OKRs methodology. In this phase, you have to have conversations with your team, analyze, be critical and honest, assess whether the activities defined in the Key Results have actually contributed to the Objectives. And assess how the Objectives within the organization have contributed to the Main Objectives and the Company goal.

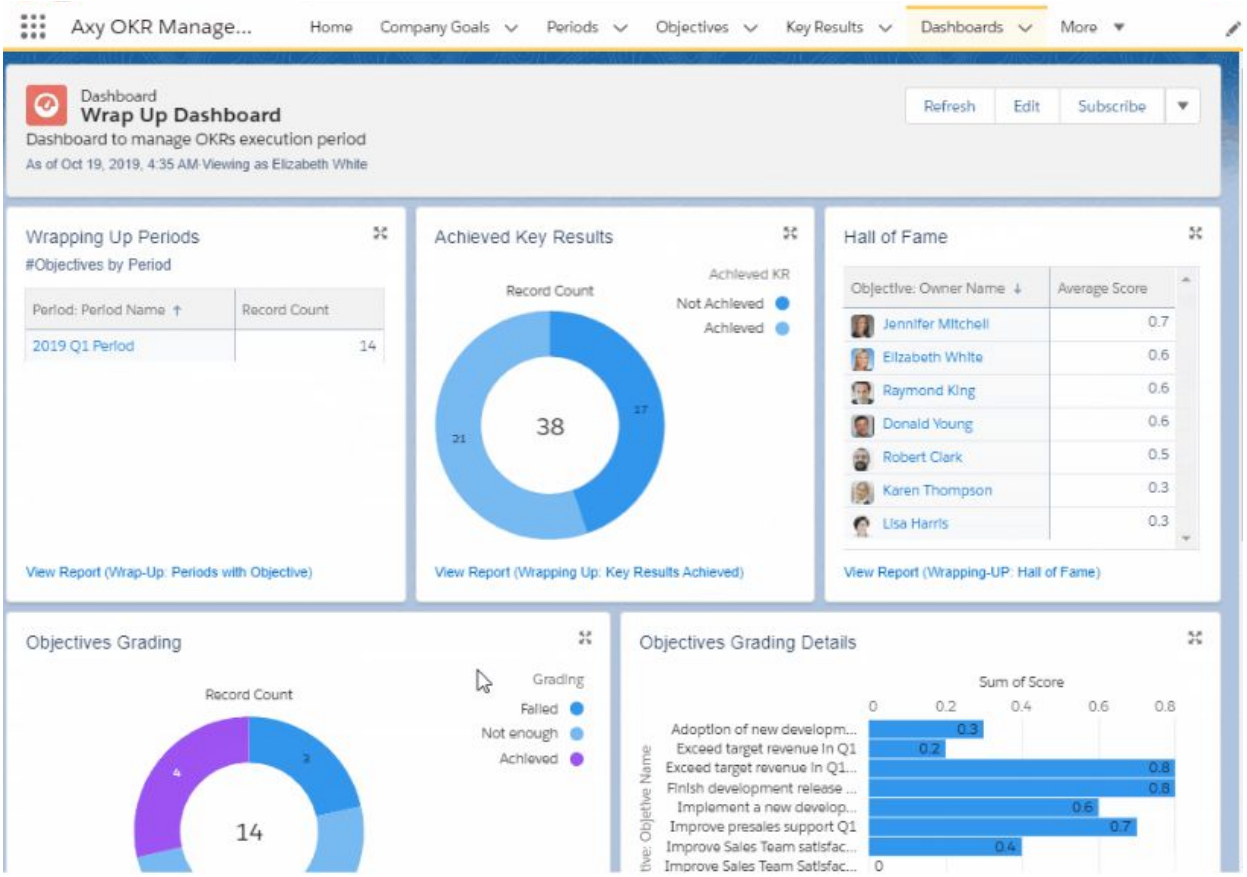
This is the time to set the **Scoring (Grading)** to the objectives. This scoring, discussed and agreed with the Managers, shows the actual progress and achievement of the objectives.

Wrap-Up dashboard shows:

- **Wrapping up Periods**. Usually the past quarter.
- **Achieved Key Results**. The total number of key results Achieved and Not Achieved
- **Hall of Fame.** Ranking of individuals as per objective scoring
- **Objectives Grading.** The number of Objectives classified as Failed, Not Enough and Achieved
- **Objectives Grading details.** The scoring ranking of Objectives.
- **Users with objectives not scored**. The list of people with no yet scored objectives
- **Objectives with Overdue Date**. Tracking of objectives with a past due date, classified by type (Company, Team or Individual)

Go through the following steps to access to Execution Dashboard

1. Navigate to ***Dashboard*** tab
2. Go to ***Wrap-Up OKR Dashboard*** *in* ***Axy OKRs Dashboards folder***
3. Refresh it and browse

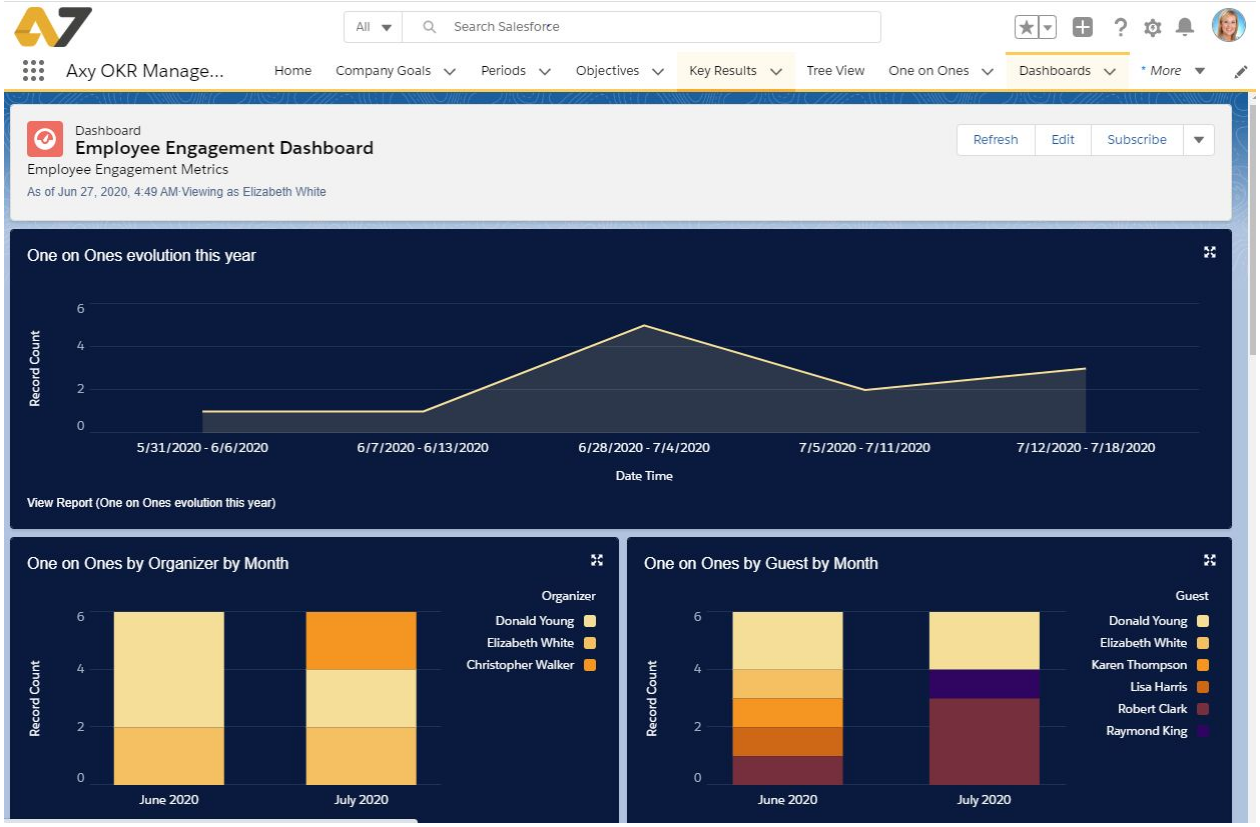


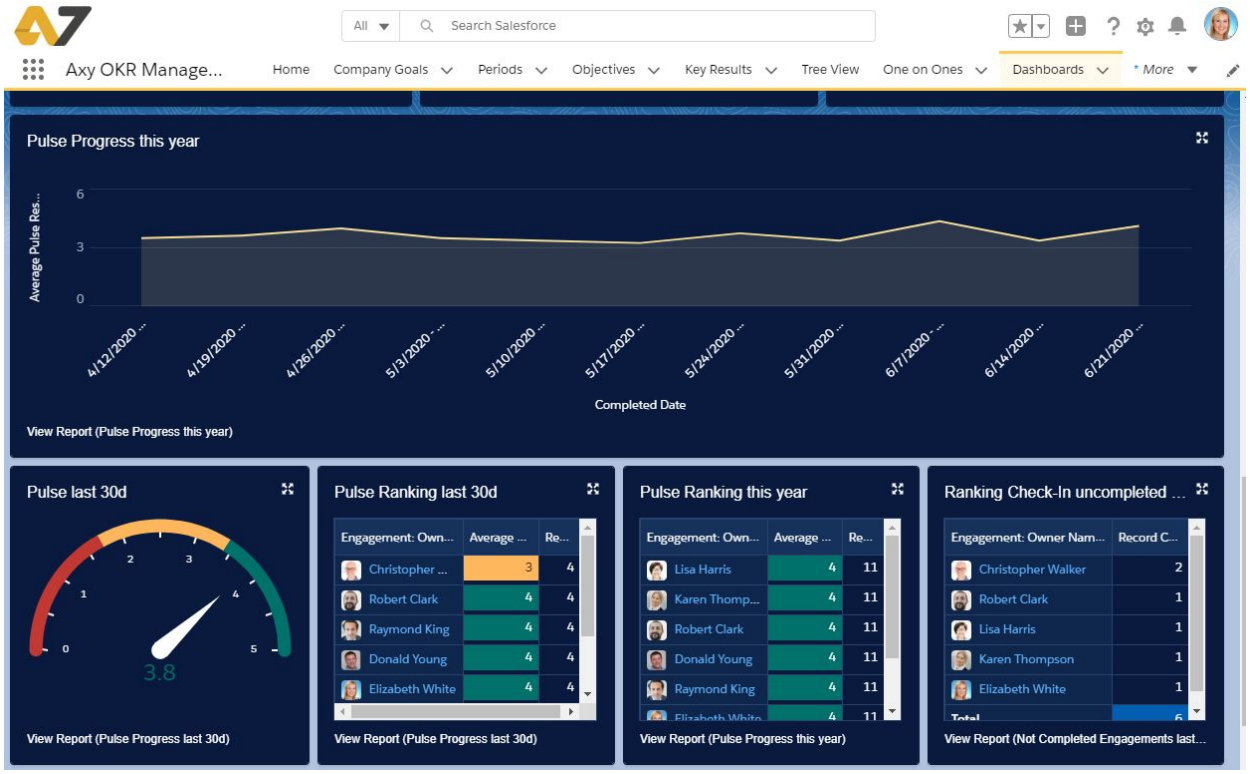
Employee Engagement Dashboard

This is an additional dashboard to facilitate analytic information about your employees **engagement** on the communication, interaction between managers and individual contributors and the satisfaction pulse of the team.

Employee Engagement dashboard shows to you:

One on Ones Evolution This Year	Pulse Progress this year
One on Ones by Organizer by Month	Pulse last 30d
One on Ones by Guest by Month	Pulse Ranking last 30d
Guest Ranking	Pulse Ranking this year
Organizer Ranking	Ranking Check-In uncompleted last 30d
Organizers	Engagements this year





Axy OKR CUSTOMIZATION SETUP

Axy OKR permits us to customize several configuration options to better adjust it to your OKR Management process. As an example, you can establish best practices, such as the quantity of OKRs per person or the thresholds for OKR scoring and grading.

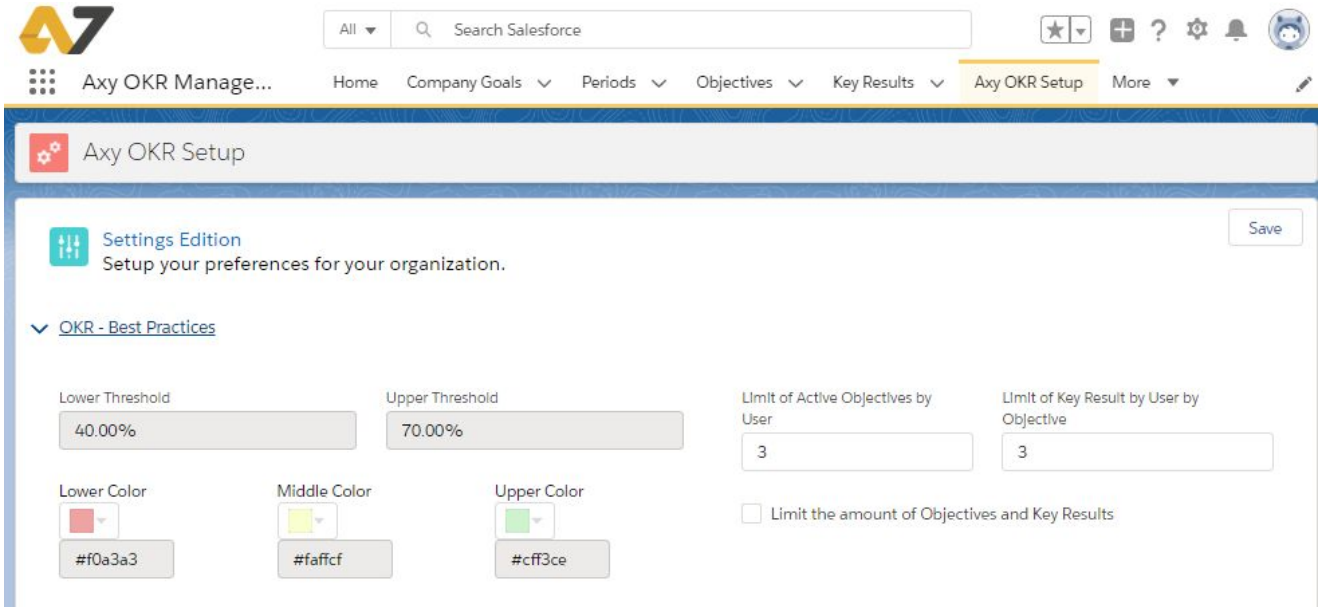
- **OKR - Best Practices**
- **Automation**
- **Notifications**
- **Org Hierarchy**
- **One on One**
- **Engagement - Checkins**

Let's explain each of them:

OKR - Best Practices

Go through the following steps to access to Axy OKR Setup > OKR - Best Practices

1. Navigate to ***Axy OKR Setup*** tab
2. Go to ***OKR - Best Practices***



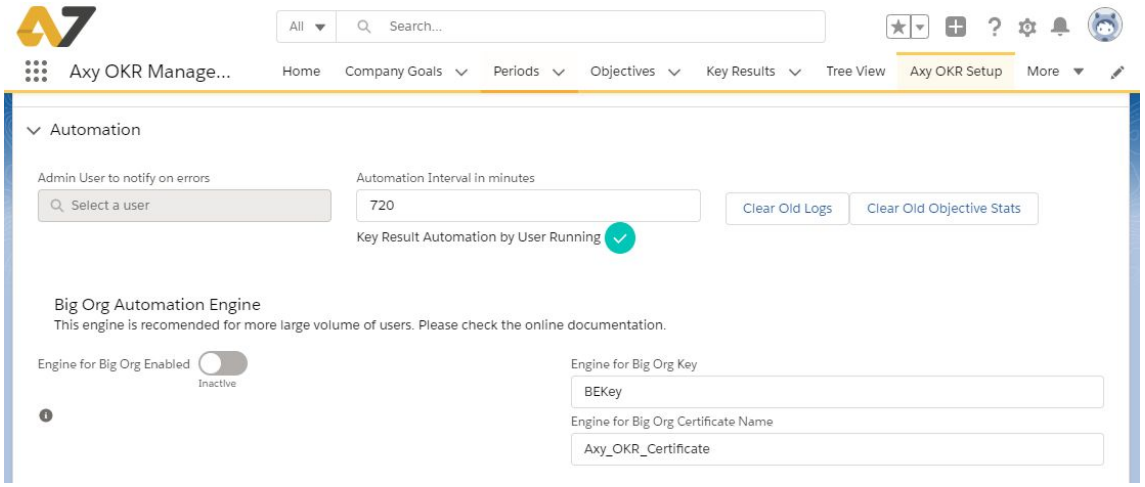
Here you can find some configuration parameters to "help" your users to follow several best practices:

- **Lower and Upper Thresholds.** These numbers define the intervals for Objective progress: bad, regular or good. These values are not editable.
- **Lower, Middle and Upper Colors.** Red, yellow and green by default to graphically show the wealth of your objective progress.
- **Limit of Active Objectives by User.** Best practice for setting Objectives is having from 3 to 5 per person.
- **Limit of Key Result by Objective.** Best practice for setting Key Results is having from 3 to 5 per each objective.
- **Limit the amount of Objectives and Key Results.** If you check this box, the limits for OKRs will be enforced.

Automation Parameters

Go through the following steps to access to Axy OKR Setup > Automation

1. Navigate to ***Axy OKR Setup*** tab
2. Go to ***Automation***



Here you can find some configuration parameters to govern the automation functions:

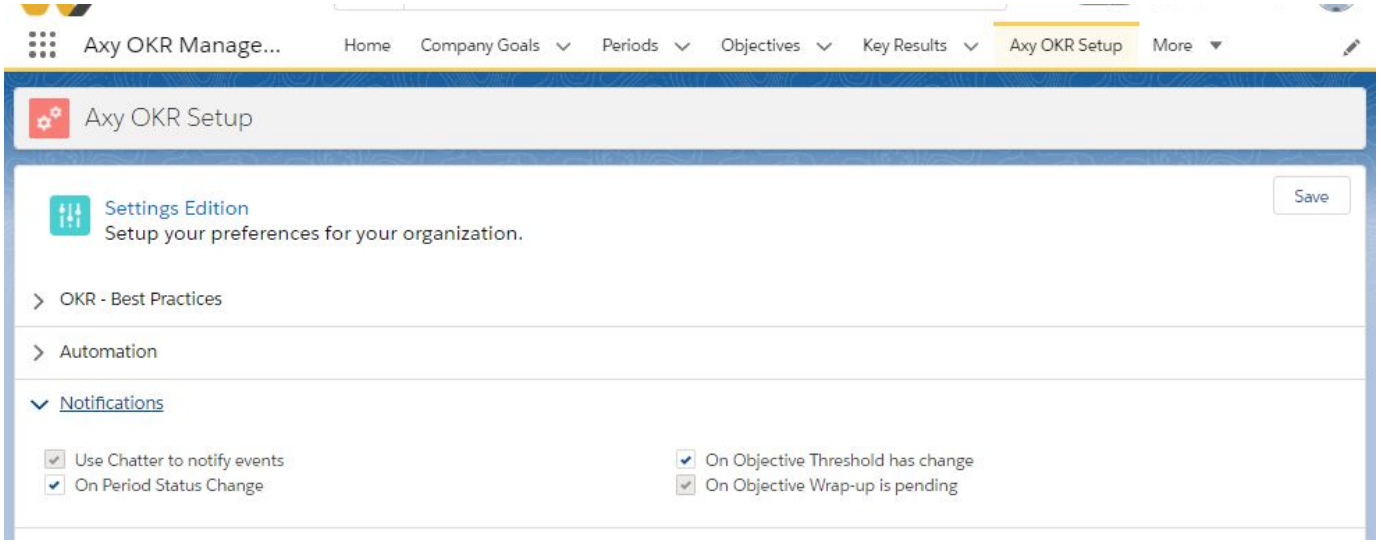
- **Admin User to notify on errors.** Select the user you want to be notified in case of any unlikely error
- **Automation Interval in minutes.** Define the frequency of the Automation process that runs the bound reports and update the results in the KRs.
    - Axy OKR will schedule a job on behalf of the OKR user XX minutes after the last refresh.
    - **Refresh cycles are per KR.** This means that, per each KR, the cycle will start individually at the time of the report binding.
- **Key Result Automation by User Running.** If you check this box, the Automation process will run.
- **Clear Old Logs.** When you push the button, the log records older than a week are deleted.
- **Clear Old Objective Stats**. When you push the button, the Objective stats from completed periods are removed.

- **Big Org Automation Engine.** This section is to define whether you will use an special Reports Automation Engine for organizations with a big number of users or not. The goal of this feature is to maintain performance when a big quantity of reports have to be run to update the automated key results progress. Please contact support@axy7.com in order to activate and set it up.

Notifications Parameters

Go through the following steps to access to Axy OKR Setup > Notifications

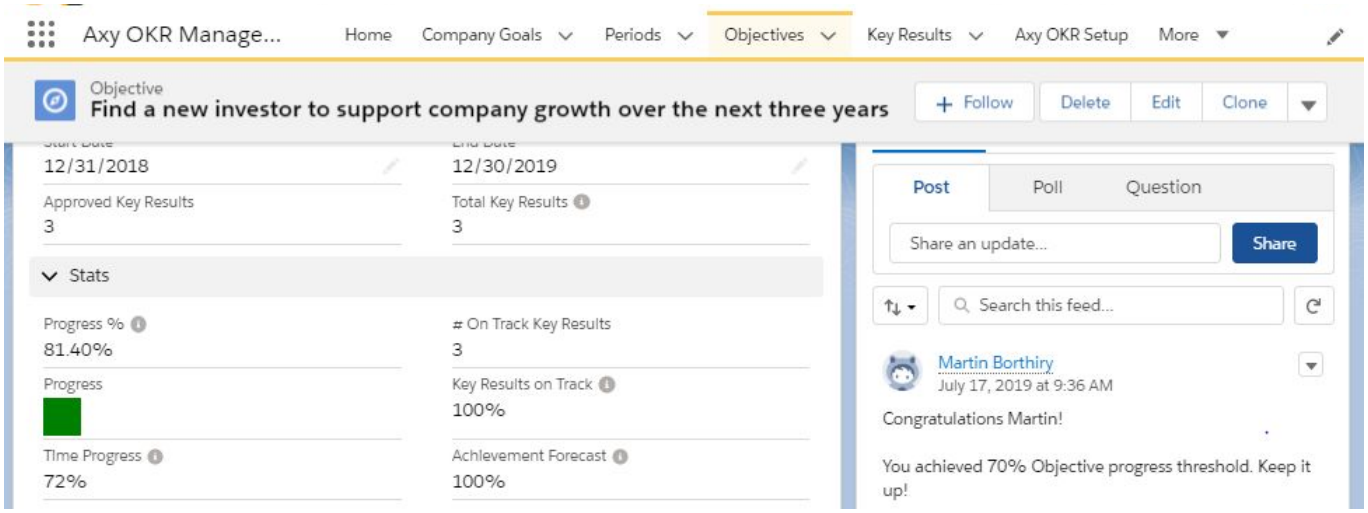
1. Navigate to ***Axy OKR Setup*** tab
2. Go to ***Notifications***



Here you can find some configuration parameters to govern the notifications

- **Use Chatter to notify events.** If you check this box, Chatter will be used to notify events.

Example:



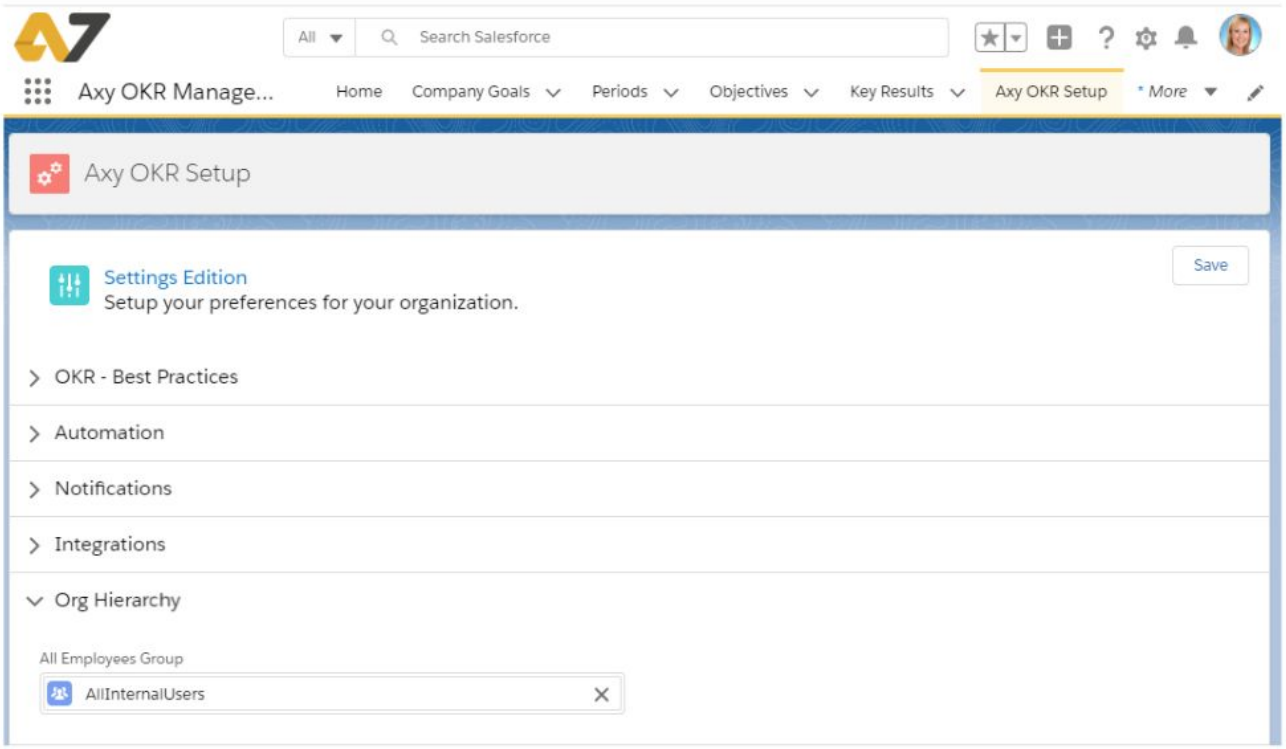
The following check boxes manage the type of events will be notified

- **On Reached Objective Threshold.** When the objective progress passes one of the thresholds. See previous example.
- **On Period Status Change.** To notify everyone the period is changing. The possible states are Planning, Active, Wrapping-Up, Completed or Cancelled
- **On Objective Wrap-up is pending.** Notifies an Objective is not Wrapped-Up yet

Org Hierarchy

Go through the following steps to access to Axy OKR Setup > Org Hierarchy

1. Navigate to ***Axy OKR Setup*** tab
2. Go to ***Org Hierarchy***

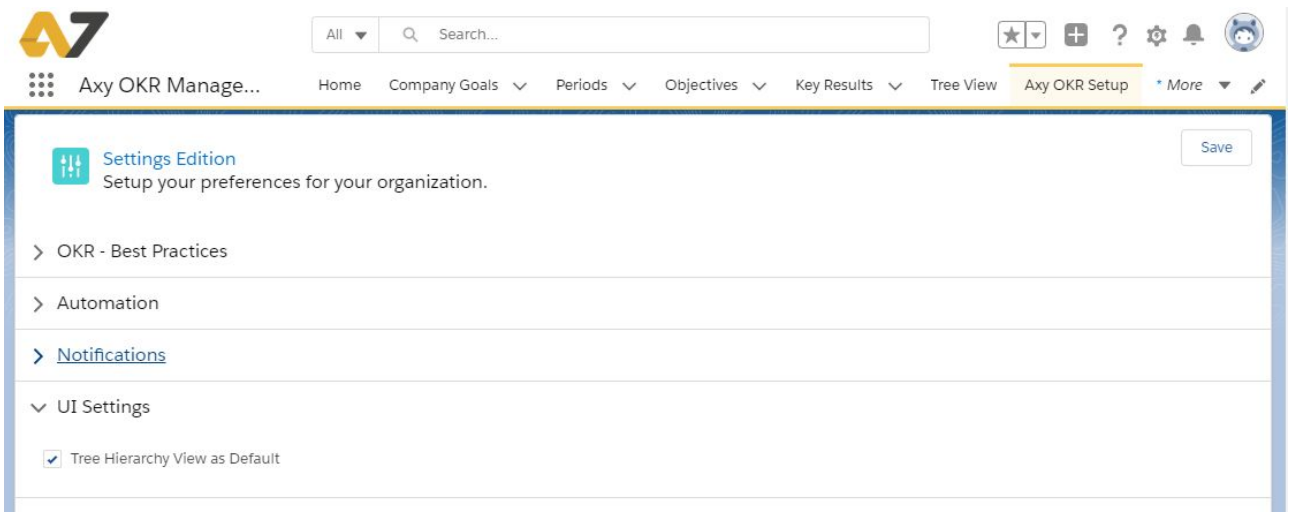


You can decide the **Group of users** with whom the **public OKRs will be shared**.

UI Settings

Go through the following steps to access to Axy OKR Setup > UI Settings

3. Navigate to ***Axy OKR Setup*** tab
4. Go to ***UI Settings***

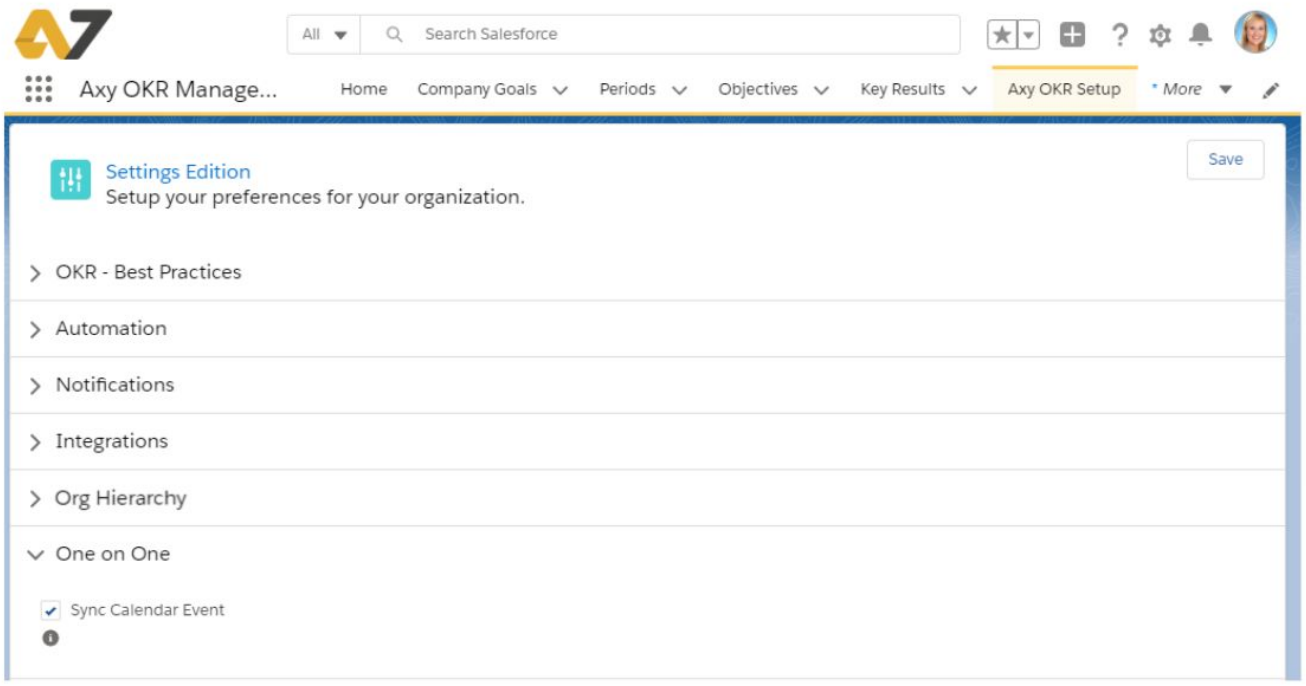


You decide whether **Tree Hierarchy View** or **Tab List View** will be used by default when you use the Tree View module.

One on One

Go through the following steps to access to Axy OKR Setup > One on One

1. Navigate to ***Axy OKR Setup*** tab
2. Go to ***One on One***



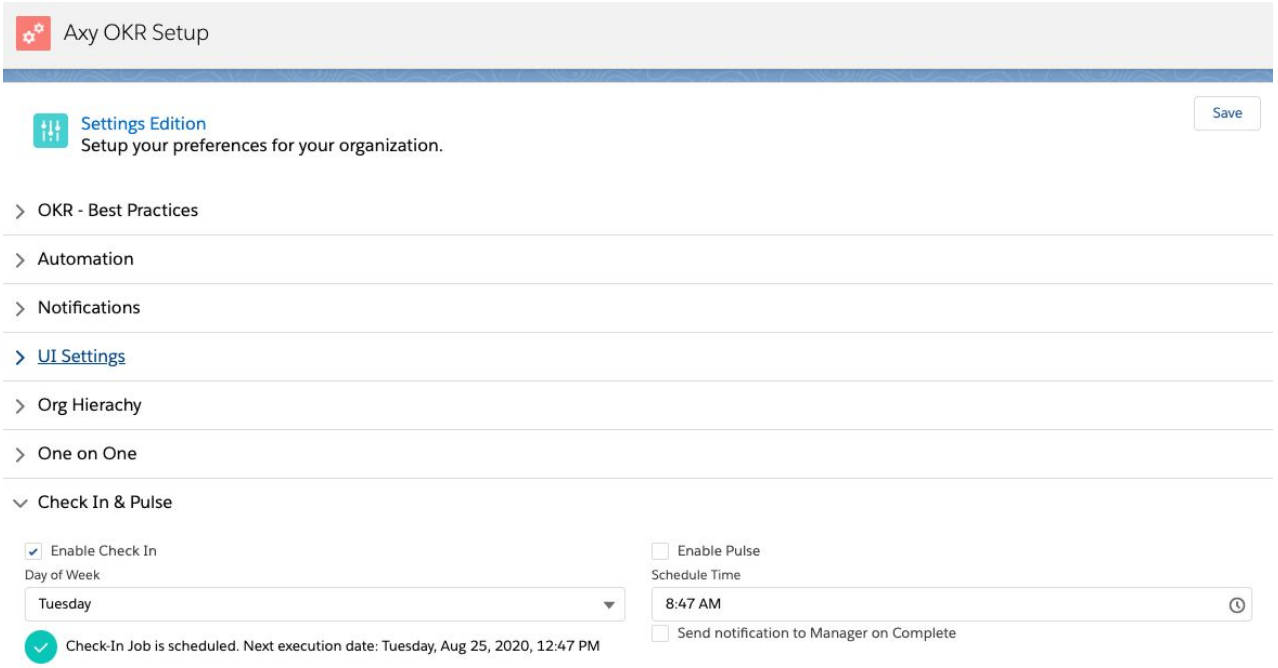
Axy OKR permits you to define whether you want to **create events in your Salesforce calendar** for the One on One´s or not.

In this way, every user will see in his/her calendar the time slots for doing the One on One. If you have the Salesforce connector for Gmail or for Outlook activated, **these events will be synchronized with your Gmail or Outlook agenda**.

Check in & Pulse

Go through the following steps to access to Axy OKR Setup > Check in & Pulse

1. Navigate to ***Axy OKR Setup*** tab
2. Go to ***Check in & Pulse***



In the options, a user can enable or disable the Check in & Pulse features. Also in the dropdown menú can select the day for the week and the time according to the company profile.

A green icon shows if the Check-In Job is scheduled, and the next execution date.

If the manager needs to review the Check in & Pulse performed by the users, the option “Send notification to Manager on Complete” has to be enabled. Once the Check-in is completed a notification and an email are sent to the user’s manager containing the Pulse information and a link to the engagement record details.

Axy OKR INSTALLATION

In this section, **Salesforce admin** will find how to:

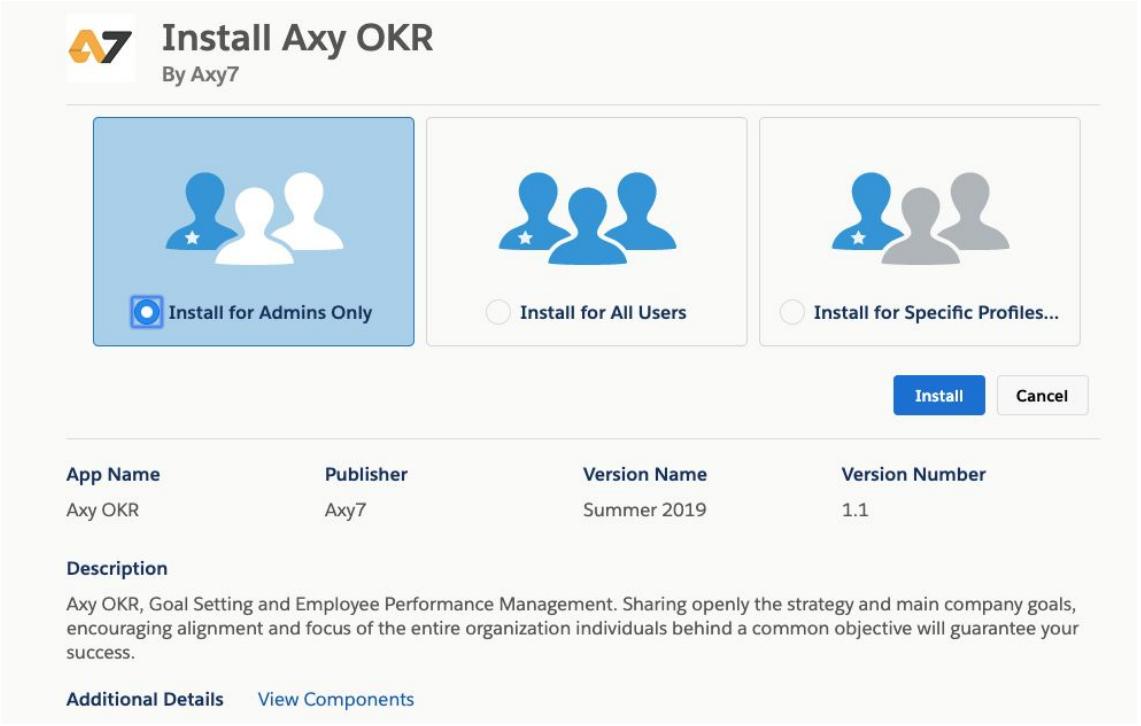
- **Install** Axy OKR in your Salesforce org.
- Assign Axy OKR **licenses**
- Assign app **Permission Sets**
- Provide access to **Axy OKR Reports and Dashboards**
- Access to **app logs**
- Activate the **Field History Tracking** (Recommendation)
- **Uninstall** Axy OKR

Install Axy OKR in your Salesforce org

Axy OKR is an app from appexchange that you can install in any Salesforce org type: production, sandbox, developer...

To install Axy OKR you need *Download AppExchange Packages* permission on your profile for your Production environment.

1. Go to our ***App listing***.
2. Log in with your production Salesforce user.
3. Click on ***Get It Now***.
4. Select if you want to install it in a ***sandbox*** or ***production*** environment.
5. Check installation details, the ***number of licenses*** that you want to have and click on ***Confirm and Install***. It is possible that you need to write again your user and password.
6. Select ***Install for Admins Only.*** After the installation process, you are going to assign permission sets to the different users

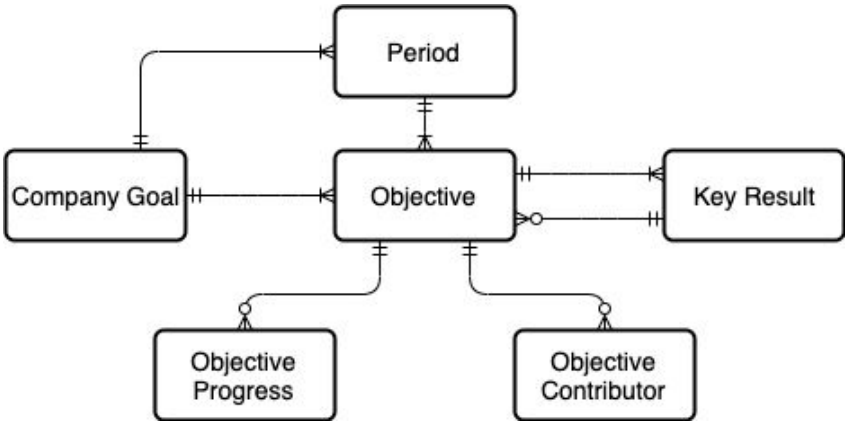


In some cases the Axy OKR installation could fail because the installation user doesn't have the 'Change Dashboard Color' permission. If this is your case, please follow these steps:

1. Create a new permission set.
2. Find the ***Change Dashboard Color*** permission and select it.
3. Assign the new permission to the installation user.
4. Try to install the app again.

Axy OKR Objects and Relationships

Below you have the Entity and Relationship Diagram of the main Axy OKR Objects.



Axy OKR Main ERD

Assign Axy OKR licenses in your Production environment

Once you have installed Axy OKR for your production org, it is time to assign the Axy OKR licenses to the users. You decide who will have access to the app so you will get a license for each of them.

1. Go to ***Setup***
2. Find for ***Installed Packages***
3. Click on ***Axy OKR Management***
4. Click on ***Manage Licences***
5. Click ***Add Users***
6. Select the users you want to assign to the package (After selecting the user, Salesforce automatically moves to the Selected Users list).
7. Click ***Add***.

Salesforce will show you the list of the users with an active license.

To **assign a license to an specific user**, you can follow these steps:

1. From Setup, enter Users in the Quick Find box, then go to **Users**
2. **Select the User** you want to assign a license.
3. **Scroll down** and go to **Managed Packages** list. Click **Assign Licenses**.
4. Salesforce automatically shows the **Unassigned Packages list**
5. Select **Axy OKR Management** and click **Add**

If you want to **remove a License,** so you can use it for other user:

1. From Setup, enter Users in the Quick Find box, then go to **Users**
2. **Select the User** you want to remove a license.
3. **Scroll down** and go to **Managed Packages** list.
4. Click on **Remove** button

Now you have to assign the Axy OKR Permission Sets

Assign Axy OKR Permission Sets

In Axy OKR you have three Permission Sets to assign to users with different functions and permissions:

- **Axy OKR – User.** Every user that will have standard access to the app including every app object, mainly Objectives and Key Results
- **Axy OKR – C-Level User**. This permission is designed for C-Level people, Directors, Managers… the members with responsibility for managing the organization. These users will have the same access as an Axy OKR - User but with ***Full Access to Company Goal records*** including View All and Modify All permissions.
- **Axy OKR – Admin User.** With this permission set, the assigned user will have the same access as an Axy OKR - User, with the ability to access and set up the app in the Setup tab.

Important note: You have to assign ***at least one*** Axy OKR – Admin User **and one** Axy OKR – C-Level User permission set.

You can add several permission sets to the same user. As an example, you can assign Axy OKR – Admin User and Axy OKR – C-Level User to an user.

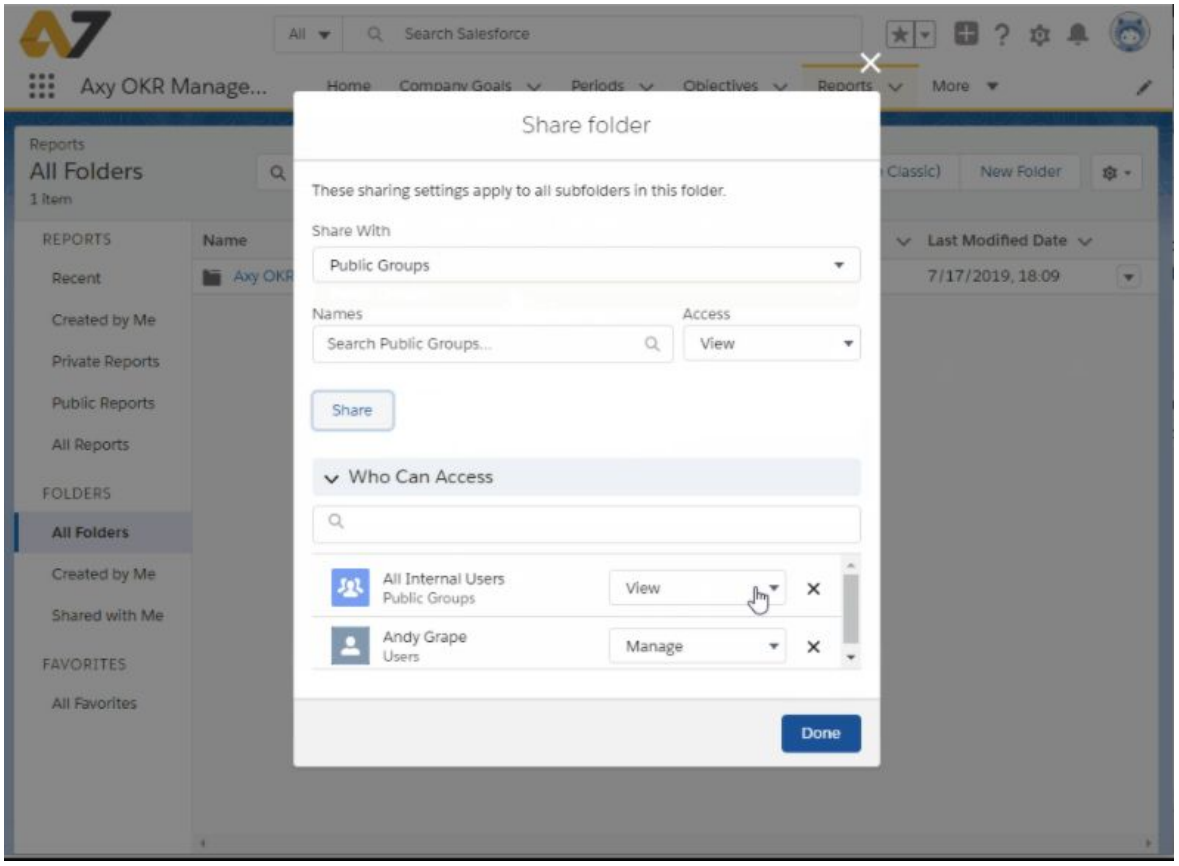
To assign them, follow the next steps for each of the three Axy OKR permission sets:

1. Go to ***Setup***
2. Find for ***Permission Sets***
3. Click on any of the Axy OKR permission sets and then ***Manage Assignments***
4. Click on ***Add Assignments***
5. You will access the list of users in your Salesforce org. ***Check the boxes*** of the users you want to assign that permission set and click ***Assign***

Providing access to Axy OKR Reports and Dashboards

Axy OKR provides a set of predefined Reports and Dashboards. **Admin user has to share access to those reports and dashboard** with the Axy OKR users.

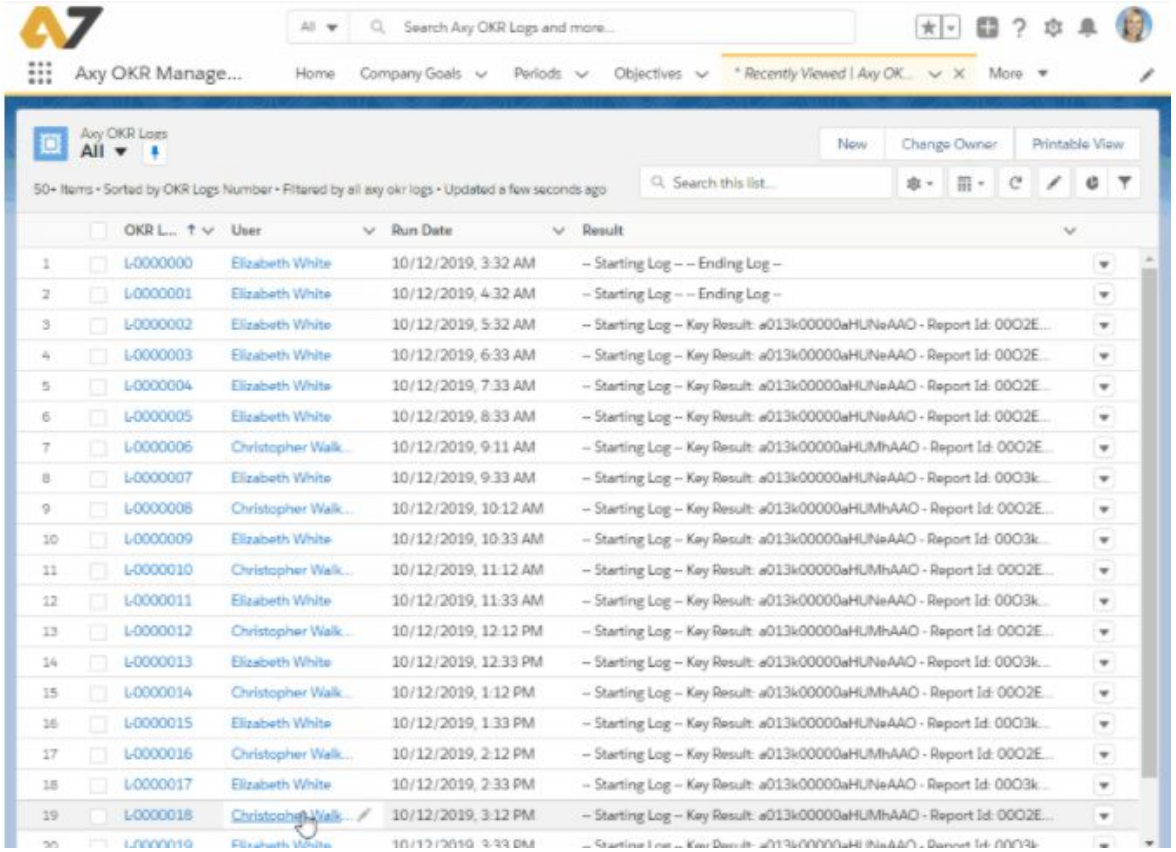
1. Go to ***Reports***
2. Browse to ***All Folders***
3. Go to ***Axy OKR Reports*** and **share** the folder with the **Internal Users group**, only for **viewing.**
4. Follow the same steps for ***Dashboards***



Access to Axy OKR Logs

As an app admin, you can see the Axy OKR Logs tab. To get the automatic Key Results results, we schedule a job by user. Each time the job is executed, we save a log record in this object to check that everything is working right.

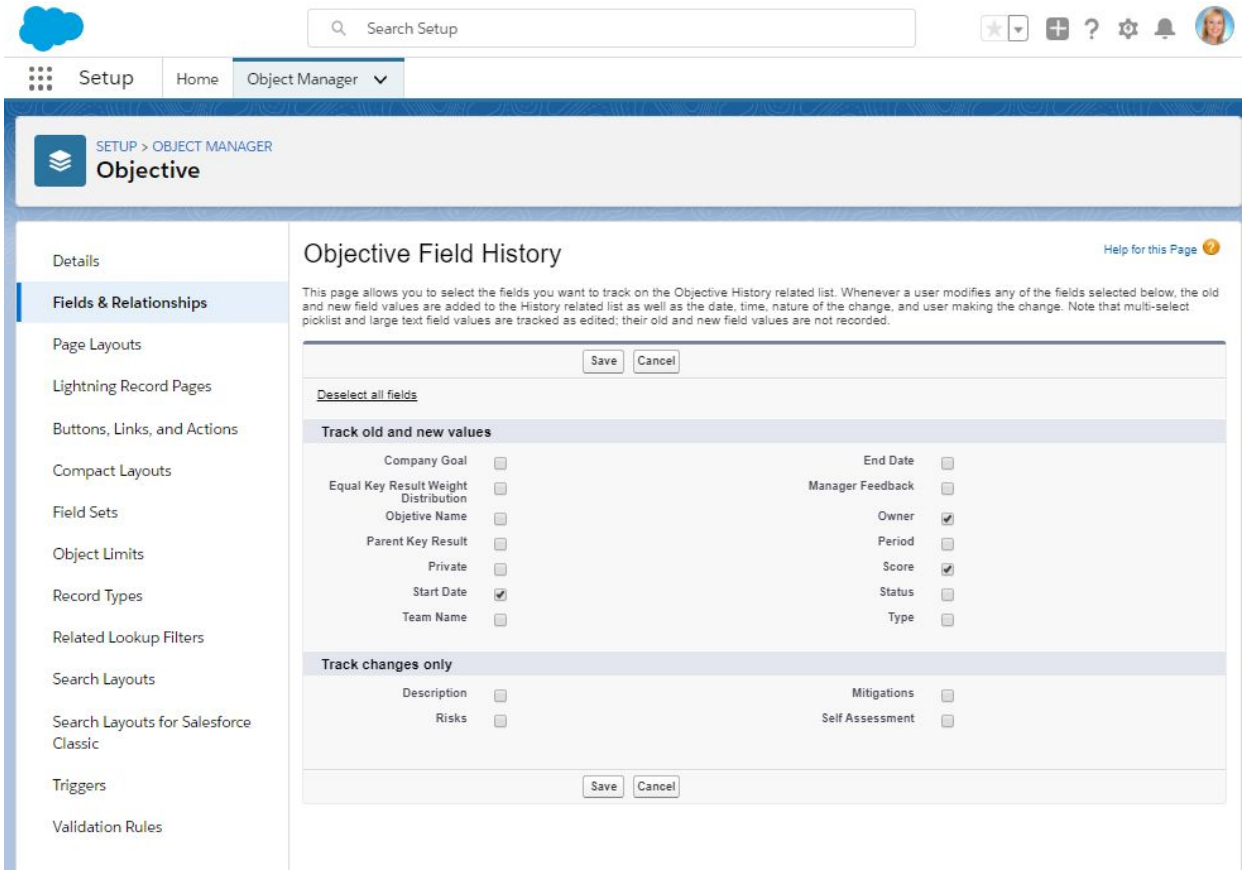
1. Navigate to ***Axy OKR Logs*** tab
2. Select the list view you want to review



Activate Field History Tracking.

We consider that tracking the changes on several Objective and Key Result fields is a good practice, as you are managing with Axy OKR the execution of your business. Therefore, our recommendation is to activate the Field History Tracking.

1. Go to ***Setup***
2. Navigate to ***Object Manager***
3. Find for any ***Object*** you want to track. For example, Objective.
4. Select Objective and then ***Fields & Relationships***
5. Select ***Set History Tracking***
6. **Check the fields** you want to track. Owner, Score and Start Date could be a good election.



Uninstall Axy OKR

In order to uninstall Axy OKR, there are **two processes that must be previously manually disabled**.

1. Go to ***Setup***
2. Find for ***Process Builder***
3. Deactivate ***Axy OKR Objective*** and ***Axy OKR Period***

Axy OKR also has a **Flow that must be disabled.**

1. Go to ***Setup***
2. In Quick Find, look for ***Flows.*** You will see ***Quick KR Creation***
3. Click on the Drop-Down list at the right and select ***View Details and Versions***
4. Deactivate the flow

If you have already been using the app, you have probably assigned the Axy OKR Permission sets. Prior to uninstalling it, you have to **remove the assignments of every permission set.**

1. Go to ***Setup***
2. Find for ***Permission Sets***
3. Click on any of the Axy OKR permission sets and then ***Manage Assignments***
4. Click on ***Add Assignments***
5. You will access the list of users in your Salesforce org. ***Check the boxes*** of the users you want to remove that permission set and click ***Remove Assignments***

Now is the moment to uninstall the package:

1. Go to ***Setup***
2. Find for ***Installed Packages***
3. Click on ***Uninstall*** link near to ***Axy OKR Management package***

Please read the information provided by the uninstall process, taking into account what you want to do with the data you created while you were using the app.

If you want to **save a copy of your data**, please **select the option "Save a copy of this package's data for 48 hours after uninstall"** and you will receive an email to save your data locally.