

# **OKR by BOJA Documentation**

## **Home**

Document revision v24

16 October, 2026

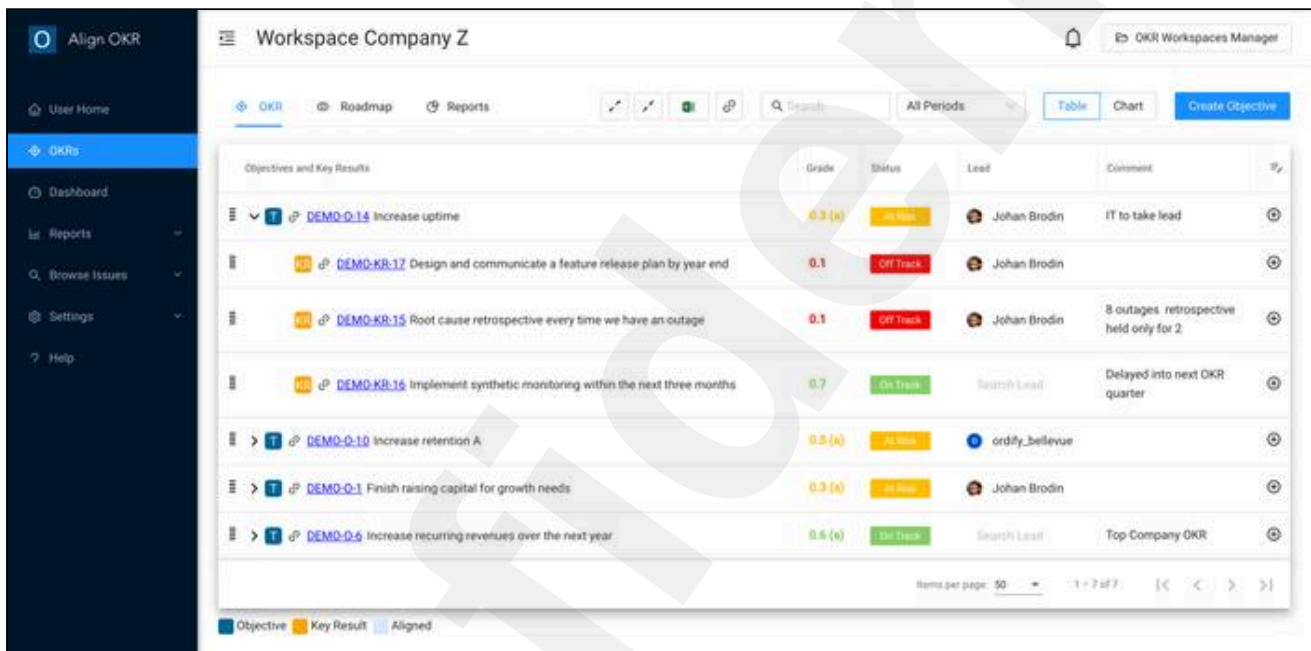
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**OKR by BOJA for Web, Jira, Confluence and monday.com** enables users to create, align and execute on common goals. It's an enterprise OKR solution developed from the ground up supporting a 4000 person company. Please see below the key solution principals (getting started)

| Design principals | Description                                                                     |
|-------------------|---------------------------------------------------------------------------------|
| Affordable        | All users within companies to have access.                                      |
| Flexible          | Full support tailoring to different OKR processes not the other way around      |
| Powerful          | The app must offer a complete OKR solution feature set driving full user value  |
| Secure            | Enterprise security and privacy. Companies must trust the security architecture |



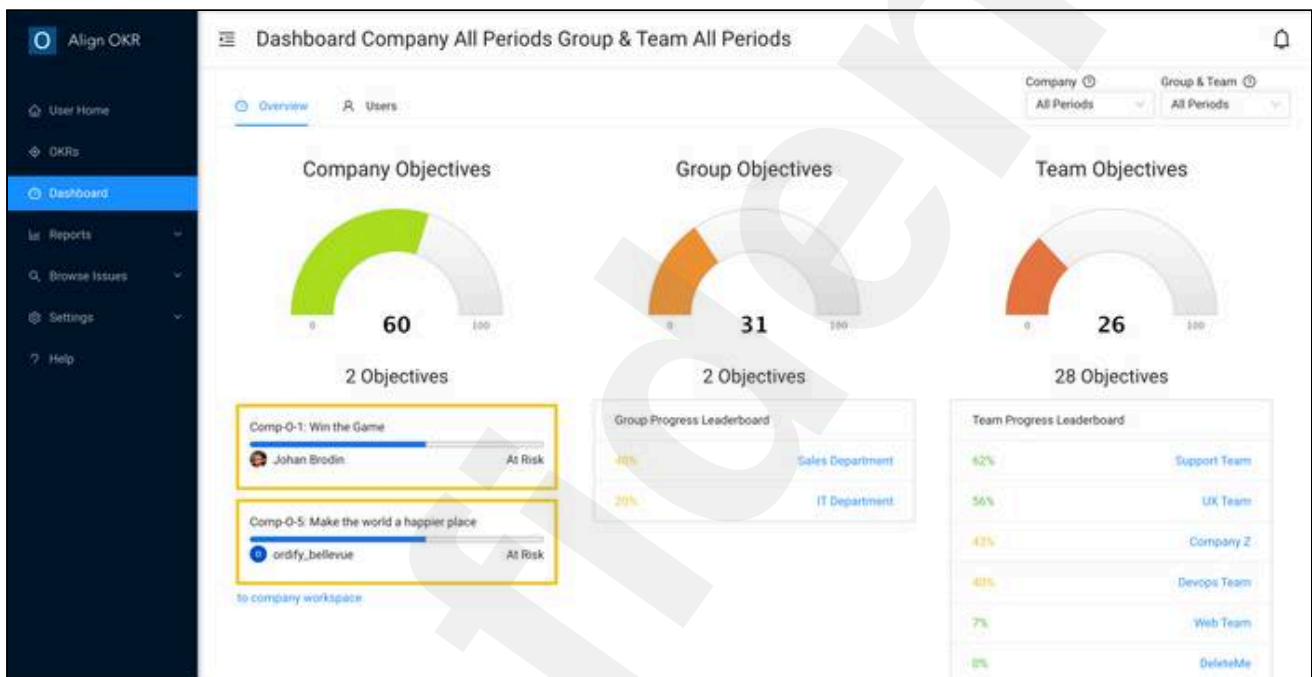
The screenshot displays the BOJA OKR application interface. On the left is a dark sidebar with navigation links: 'Align OKR', 'User Home', 'OKRs', 'Dashboard', 'Reports', 'Browse Issues', 'Settings', and 'Help'. The main content area is titled 'Workspace Company Z' and features a top navigation bar with 'OKR', 'Roadmap', and 'Reports' tabs. Below this is a search bar and a 'Create Objective' button. The central part of the interface is a table titled 'Objectives and Key Results' with columns for 'Grade', 'Status', 'Lead', and 'Comment'. The table lists several OKRs, including 'DEMO-Q-14 Increase uptime' (Grade 0.3, On Track, Lead: Johan Brodin), 'DEMO-KR-17 Design and communicate a feature release plan by year end' (Grade 0.1, Off Track, Lead: Johan Brodin), 'DEMO-KR-15 Root cause retrospective every time we have an outage' (Grade 0.1, Off Track, Lead: Johan Brodin), 'DEMO-KR-16 Implement synthetic monitoring within the next three months' (Grade 0.7, On Track, Lead: Search Lead), 'DEMO-Q-10 Increase retention A' (Grade 0.5, On Track, Lead: ordify\_bellevue), 'DEMO-Q-1 Finish raising capital for growth needs' (Grade 0.3, On Track, Lead: Johan Brodin), and 'DEMO-Q-5 Increase recurring revenues over the next year' (Grade 0.6, On Track, Lead: Search Lead). The table also includes a 'Comment' column with details like 'IT to take lead', '8 outages, retrospective held only for 2', 'Delayed into next OKR quarter', and 'Top Company OKR'. At the bottom, there is a legend for 'Objective', 'Key Result', and 'Aligned', and a pagination bar showing 'Items per page: 50' and '1 - 7 of 7'.

### Excel like Way of Working

Fully configurable OKR table. Inline editing, change order, user columns or swap in default ones, export to CSV and Excel

### Align and Assign OKRs

Align and assign OKRs between company, group, team, personal with full support for multiple OKR alignments

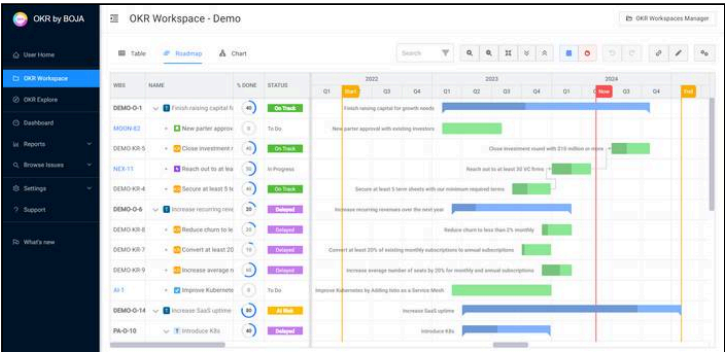
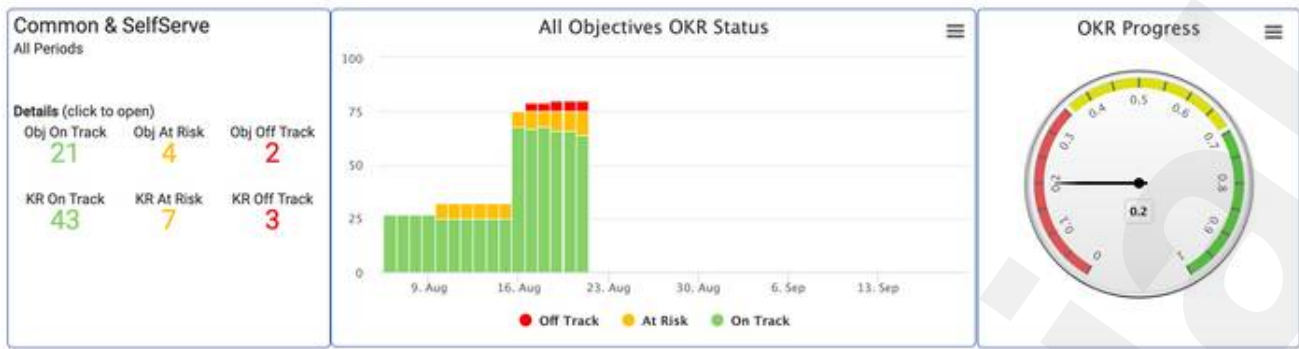


## Dashboard

Quickly see OKR status and take actions

## Multiple Reports

Drive visibility with multiple reports such as performance, alignment, custom and user. Clickable down to individual OKRs for editing



OKRs on Gantt Roadmap

Visualize OKRs roadmap on gantt chart with dependencies

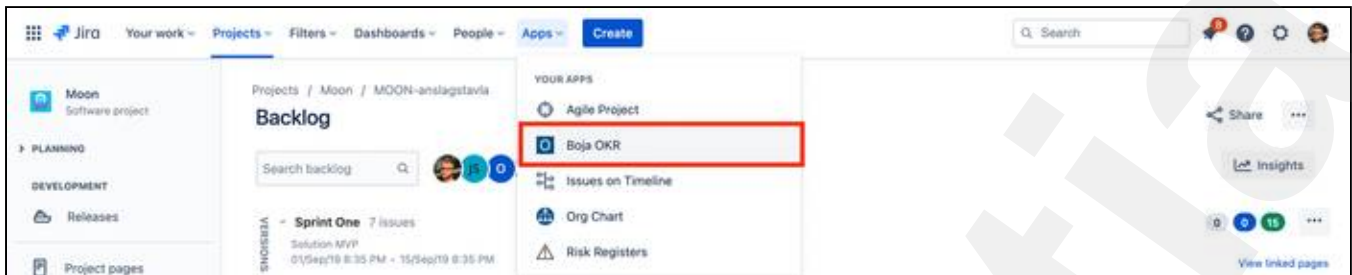
# 1 Getting Started

OKR by BOJA comes in both a Jira cloud, monday.com and web edition.

- Jira Edition
- Confluence Edition
- monday.com Edition
- Web Edition
- Online Demo

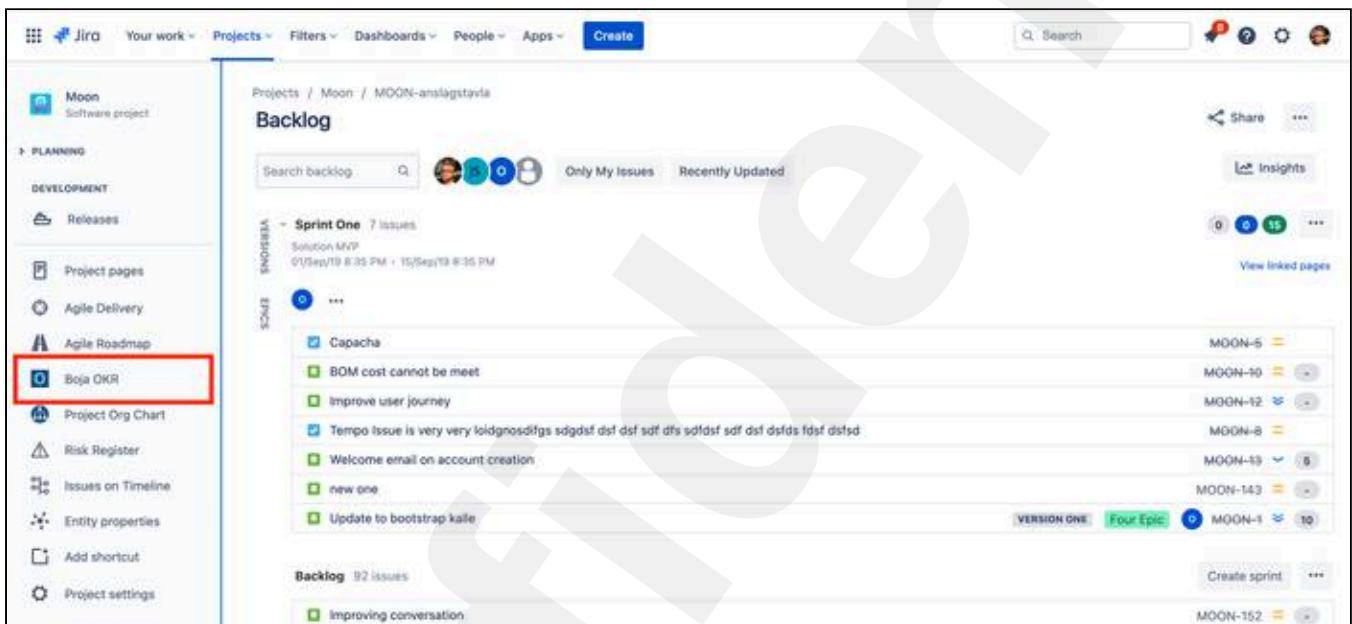
## 1.1 Jira Edition

### 1.1.1 Launch from Jira Apps menu



### 1.1.2

#### Launch from a Jira Board



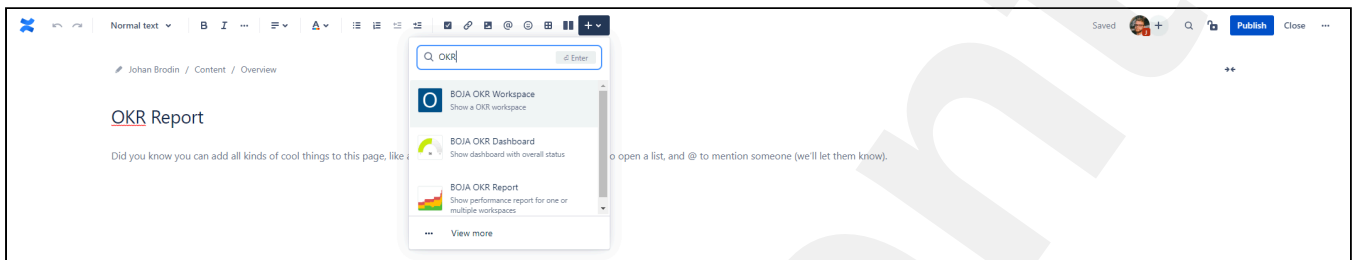
## 1.2 Confluence Edition

BOJA OKR for Confluence app is an extension to “BOJA OKR for Jira”. It adds three Confluence macros.

- Add OKR Macro to Confluence Page
- OKR Workspace
- OKR Performance Report
- OKR Dashboard

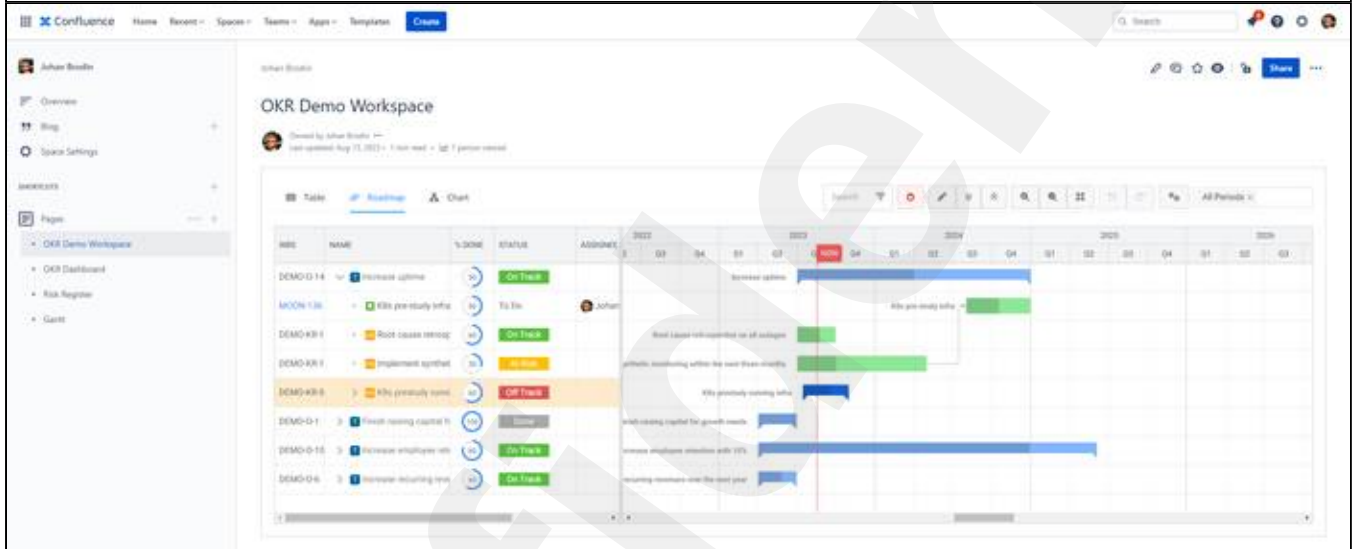
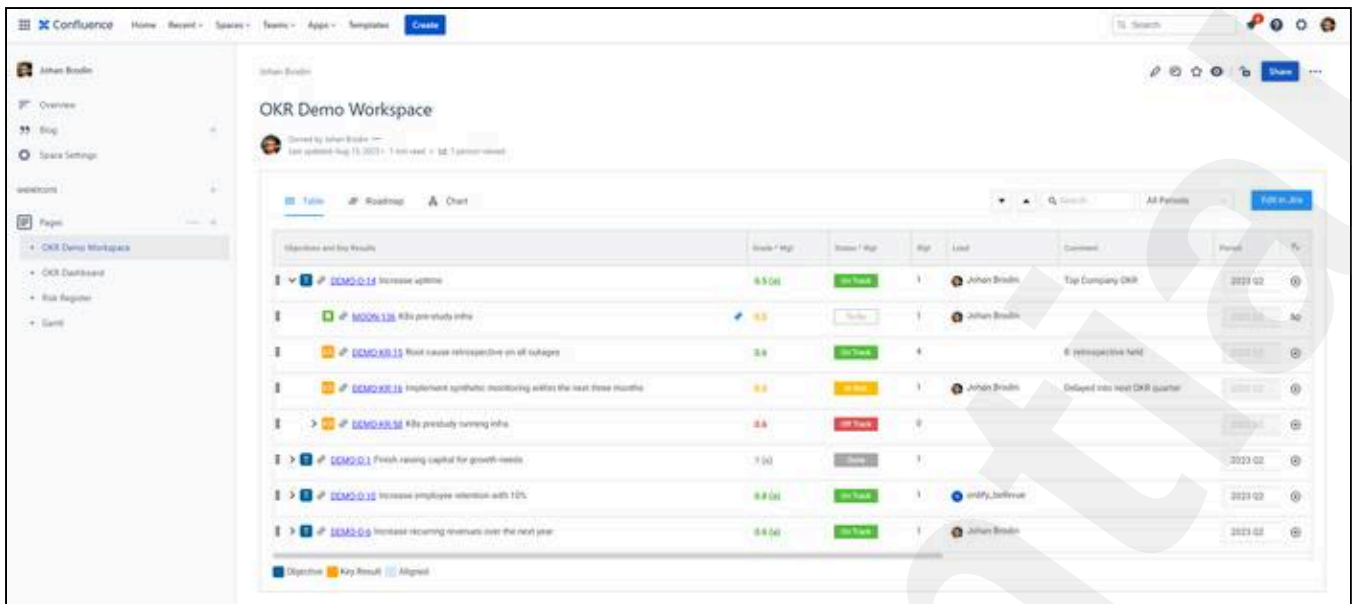
### 1.2.1 Add OKR macro to Confluence page

Three macros are available after installation: OKR Workspace, OKR Dashboard and OKR Report.



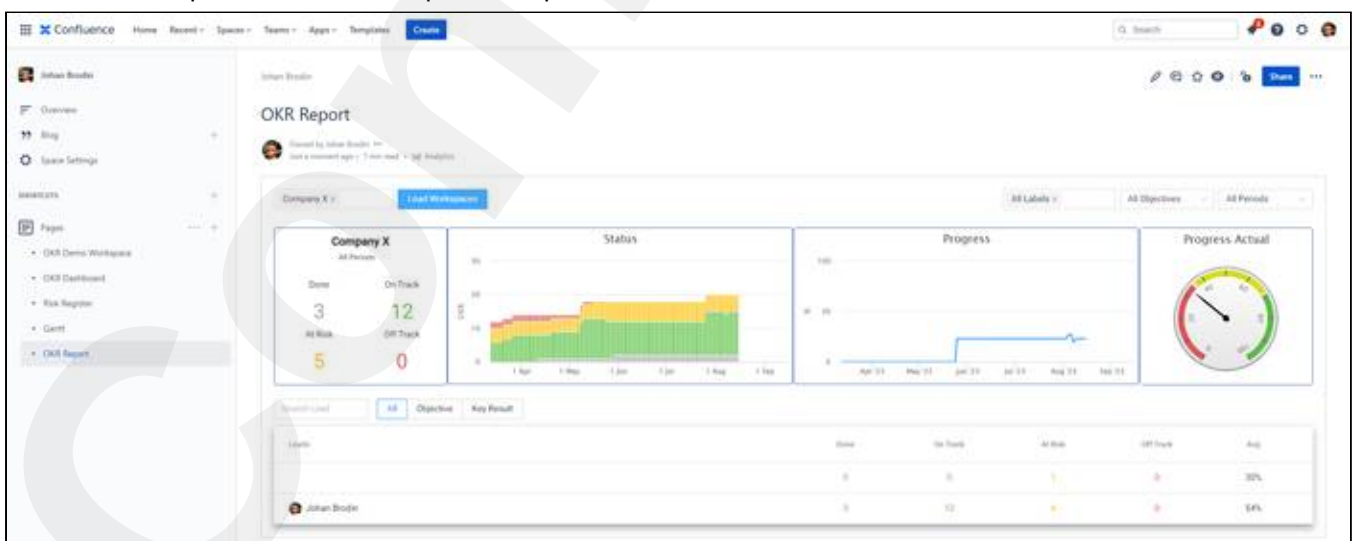
### 1.2.2 OKR Workspace

Show your OKR workspace including timelines on Gantt on Confluence pages.



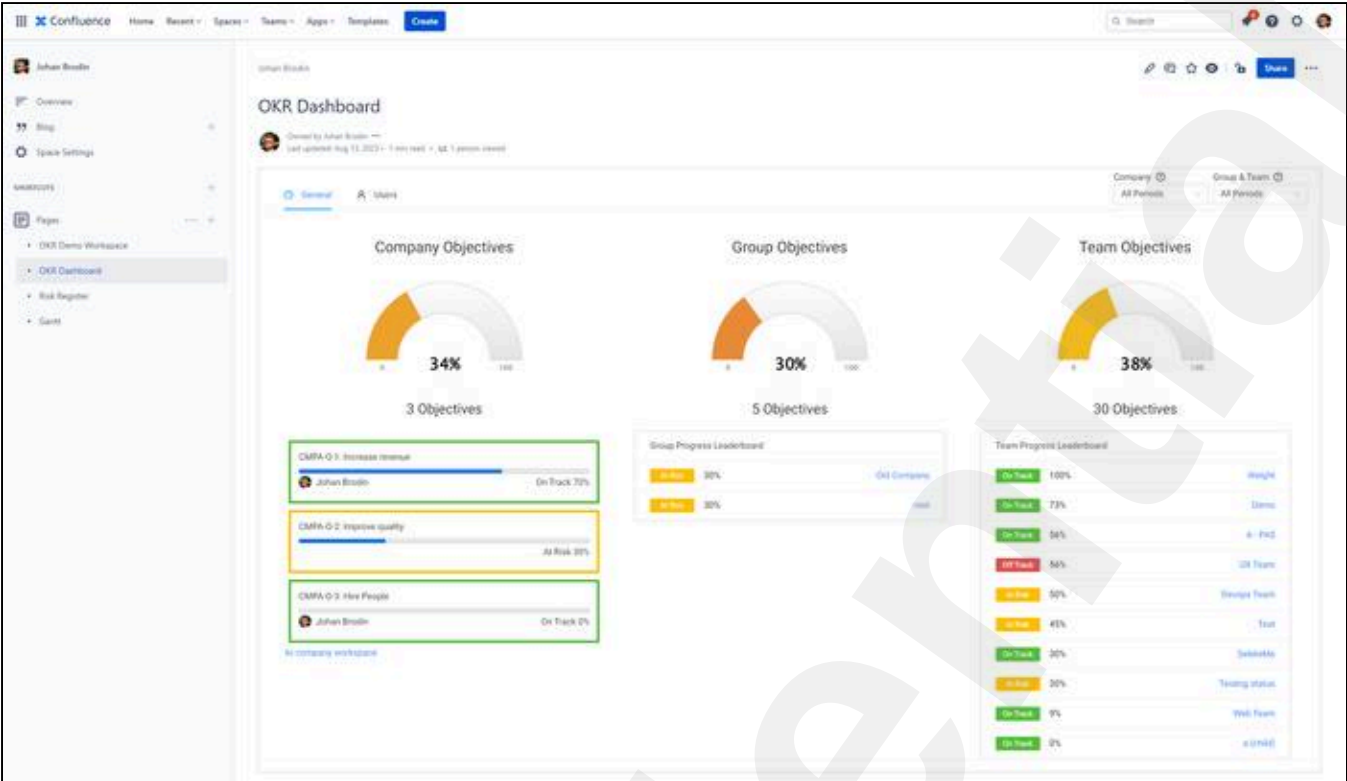
### 1.2.3 OKR Performance Report

Performance report to one or multiple Workspaces. Drill down to individual OKRs and take actions.



### 1.2.4 OKR Dashboard

Dashboard with company, group and team status. Quickly see the overall picture and take actions.



## 1.3 monday.com Edition

TBD

Confidential

## 1.4 Web Edition

Getting started is straight forward with easy signup of new companies and adding users

- Sign up your company at bjaokr.io
- Add users

### 1.4.1 Sign up your company at at bojaokr.io

The screenshot displays the Align OKR website interface. At the top, the navigation bar includes links for Home, Demo, Pricing, Why, and a green Login button. The main banner features the text "OKR Software Free Forever" and "We love OKR and our mission is to provide quality OKR software for all". Below the banner, a navigation bar contains links for User Login, Invited User, Company Signup, and alignokr.io. The "Company Signup" link is highlighted, and a modal form is displayed. The form has a red header "Company Signup" and contains the following fields: "My company", "john.doe@mycompany.com", and a password field with masked characters. A "Create Account and start using Align OKR" button is at the bottom of the form. A disclaimer at the bottom of the form states: "By clicking the button you acknowledge that you accept our [terms of service](#)".

## 1.5 Online Demo

If you want to try Boja OKR without signing up no problem! Take a look at our online demo

## 2 Workspace

Boja OKR centers around workspaces. A workspace can be of type company, group, team and personal. Each workspace has a permission scheme, lead person and unique key. A personal workspace can be public or either public or private to the user.

OKR objective and key results are then added to different workspaces. This can be done in a fully customisable table working like in Excel or in a graphical chart view. On Jira cloud Jira Issues can be linked to both objectives and key results.

Finally Objectives in different workspaces can be aligned (upstream). This means that a team can align its objective to both a group as well as a company objective. Key result can also be assigned (downstream). This means that a manager can assign one of his key result to an employee or team for them to work on.

- Workspace Manager
- Create Workspace
- Private Workspaces

### 2.1 Workspaces Manager

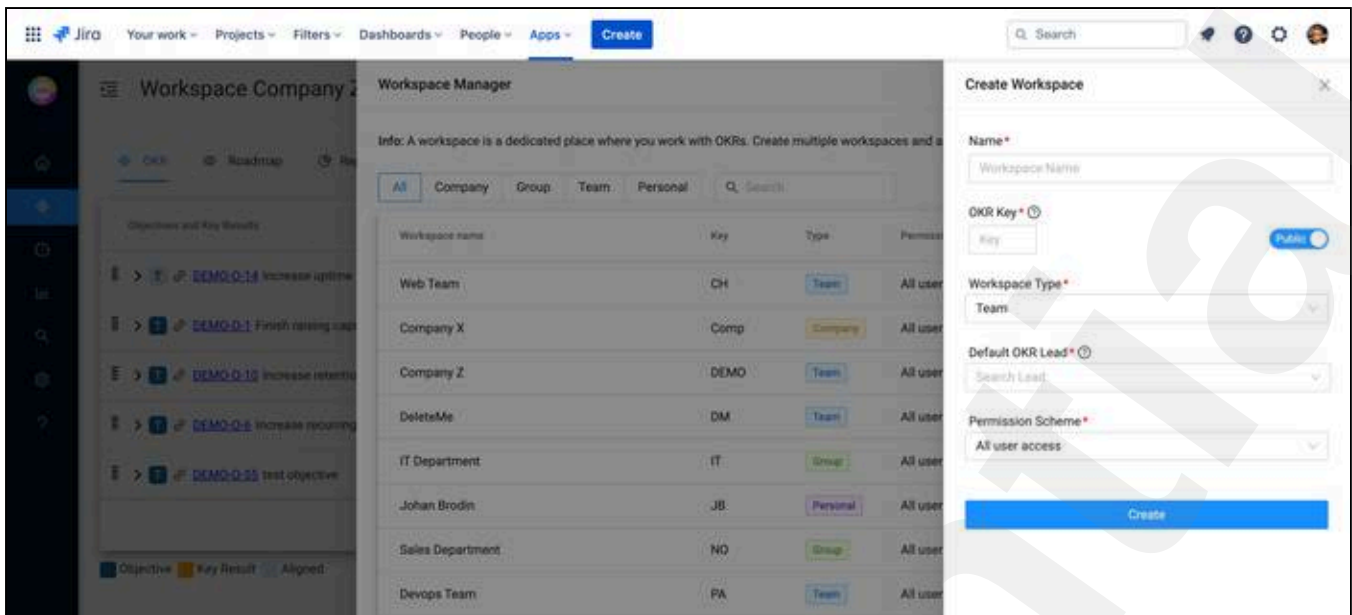
The screenshot displays the BOJA OKR interface. The top navigation bar includes 'Align OKR', 'User Home', and a 'Workspace Company Z' header. The left sidebar contains links for 'OKRs', 'Dashboard', 'Reports', 'Browse Issues', 'Settings', and 'Help'. The main content area shows a list of Objectives and Key Results (OKRs) for 'Workspace Company Z'. A red box highlights the 'OKR Workspaces Manager' button in the top right corner.

The 'Workspace Manager' modal is open, showing a list of workspaces. The modal includes a search bar and tabs for 'All', 'Company', 'Group', 'Team', and 'Personal'. The list of workspaces is as follows:

| Workspace name   | Key  | Type     | Permission scheme | Lead         | Actions |
|------------------|------|----------|-------------------|--------------|---------|
| Web Team         | CH   | Team     | All user access   |              |         |
| Company X        | Comp | Company  | All user access   |              |         |
| Company Z        | DEMO | Team     | All user access   | Johan Brodin |         |
| DeleteMe         | DM   | Team     | All user access   | Johan Brodin |         |
| IT Department    | IT   | Group    | All user access   | Johan Brodin |         |
| Johan Brodin     | JB   | Personal | All user access   | Johan Brodin |         |
| Sales Department | NO   | Group    | All user access   |              |         |
| Devops Team      | PA   | Team     | All user access   |              |         |
| LIX Team         | TE   | Team     | All user access   |              |         |
| Support Team     | TX   | Team     | All user access   |              |         |

## 2.2 Create Workspace

Press the right top "Create New Workspace" button



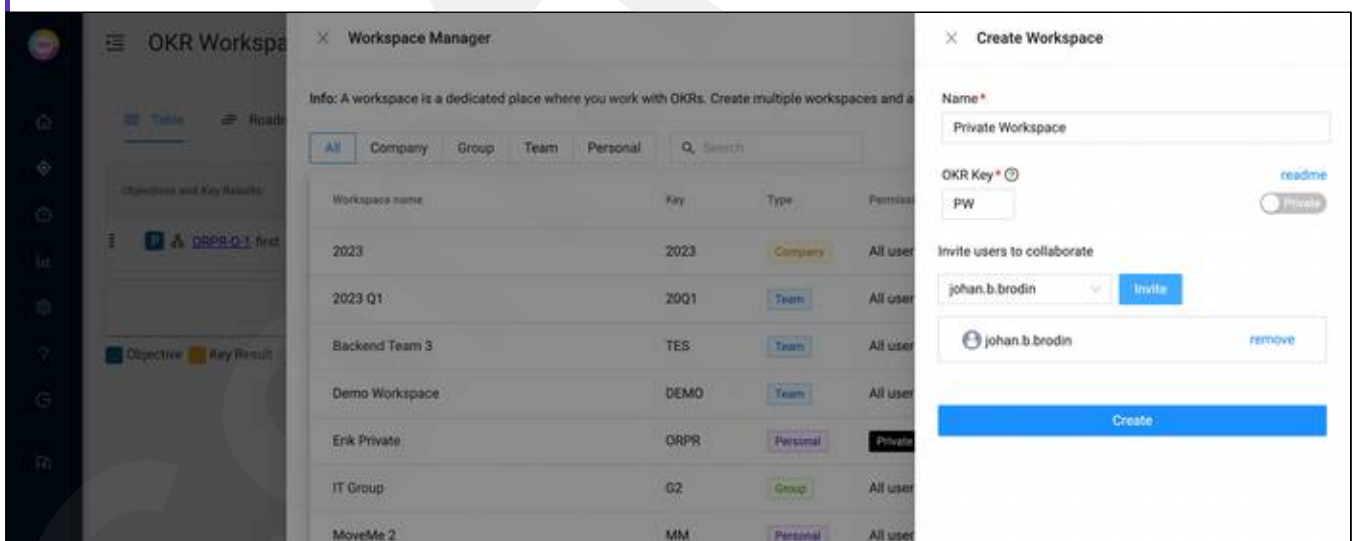
## 2.3 Private Workspace

In private workspaces only the person who created the workspace can open and view the OKRs. That person can also invite collaborators with full access.

Please note that admins can delete and change name of private workspaces but have no access to the OKR data itself.

### Limitation

OKR data in private workspaces are restricted in the user interface and not in the database layer. So trusted logged in users might with “hacking” and direct API calls get access. Please, put truly sensitive information as Jira issues linked to OKRs which are fully protected.



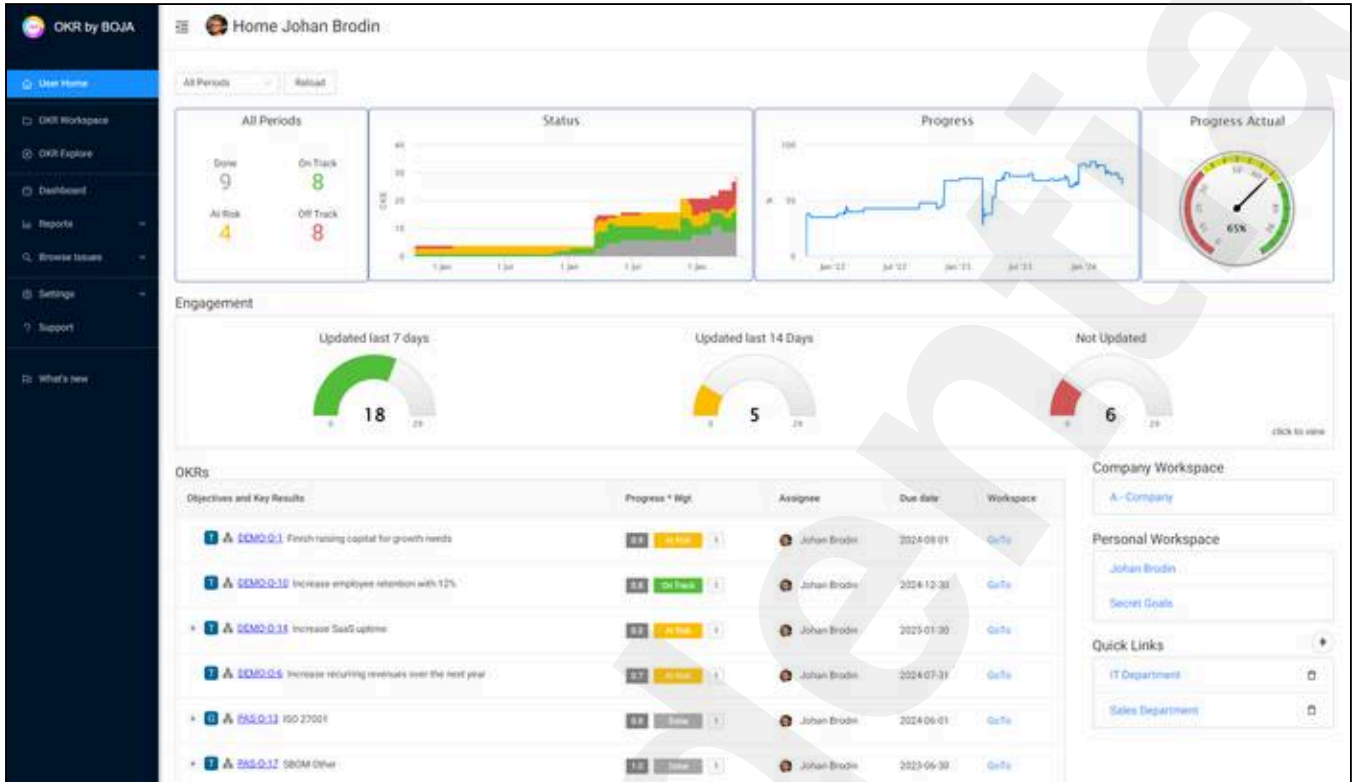
## 3 OKR

The solution supports both a customisable table view as well as a Chart view working with OKRs

- User Home
- OKR Grade & Status
- OKR Table View
- OKR Chart View
- Align & Assign OKRs
- External Links
- Restore OKR
- Jira Features
- monday.com Features

## 3.1 User Home

Quickly see all user assigned OKRs with engagement report and take actions on those in user home. There are also quick links to the company, user personal and configurable workspaces.



## 3.2 OKR Views

- OKR Table View
- OKR Roadmap View
- OKR Chart View

### 3.2.1 OKR Table View

Work with OKR as in an Excel table... Edit OKRs inline, drag & drop rows, add & delete OKRs, expand & collapse, search for OKRs, export to Excel and select Period.

- Customise Table Columns

OKR Workspace - Demo

Table | Roadmap | Chart

Search

All Periods

Create Objective

| Objective and Key Result                                                              | Create * Wgt | Status * Wgt | Wgt | Lead          | Description                                                      | Updated    |
|---------------------------------------------------------------------------------------|--------------|--------------|-----|---------------|------------------------------------------------------------------|------------|
| DEM001 Fresh raising capital for growth needs                                         | 0.9 (A)      | On Track     | 1   | Johan Brodin  | Key one for company                                              | 2024-04-23 |
| DEM002 Close investment round with \$10 million or more                               | 1            | Done         | 2   | Search Lead   | Actions<br>• Contact investors<br>• Book pitch meetings          | 2024-04-23 |
| NC11 Reach out to at least 30 VC firms                                                | 0.8          | In Progress  | 1   | Search Lead   | Contact and reach out to 30 VC firms to pitch investment round A | 2024-04-16 |
| DEM003 Secure at least 5 term sheets with our minimum required terms                  | 1            | Done         | 1   | Search Lead   |                                                                  | 2024-04-23 |
| MD002 New partner approval with existing investors                                    | 0            | To Do        | 1   | Search Lead   |                                                                  | 2024-02-16 |
| DEM004 Increase recurring revenues over the next year                                 | 0.7 (A)      | On Track     | 1   | Johan Brodin  | 2024-04-20 - on track, great work                                | 2024-04-23 |
| DEM005 Reduce churn to less than 2% monthly                                           | 0.8          | On Track     | 1   | ordly_bellise | Links<br>• Feedback<br>• Documentation                           | 2024-04-23 |
| DEM006 Convert at least 20% of existing monthly subscriptions to annual subscriptions | 0.7          | On Track     | 1   | ordly_bellise |                                                                  | 2024-04-23 |
| DEM007 Increase average number of seats by 20% for monthly and annual subscriptions   | 0.6          | On Track     | 1   | Search Lead   |                                                                  | 2024-02-17 |
| DEM008 Increase Seat uptake                                                           | 0.6 (A)      | On Track     | 1   | Johan Brodin  |                                                                  | 2024-04-23 |
| DEM009 Increase employee retention with 12%                                           | 0.8 (A)      | On Track     | 1   | Johan Brodin  |                                                                  | 2024-04-13 |

Objective Key Result Aligned

#### 3.2.1.1 Customise Table Columns

Press the top right table column manager icon or select “Column Manager” in settings. Changes are saved within the workspace and are shared with all using the workspace.

Create new columns, enable & disable and swap column order. Column width is set by drag & drop directly in the table.

BOJA OKR

OKR Workspace Company X

Table | Roadmap | Chart

Search

Column Manager (in workspace)

Drag & Drop to order columns

- ☒ Objectives and Key Results
- ☒ Grade
- ☒ Status
- ☒ Wgt
- ☒ Lead
- ☒ Comment
- ☐ Type
- ☐ Description
- ☐ Period
- ☐ DueDate
- ☐ Created By
- ☐ Labels
- ☒ Updated

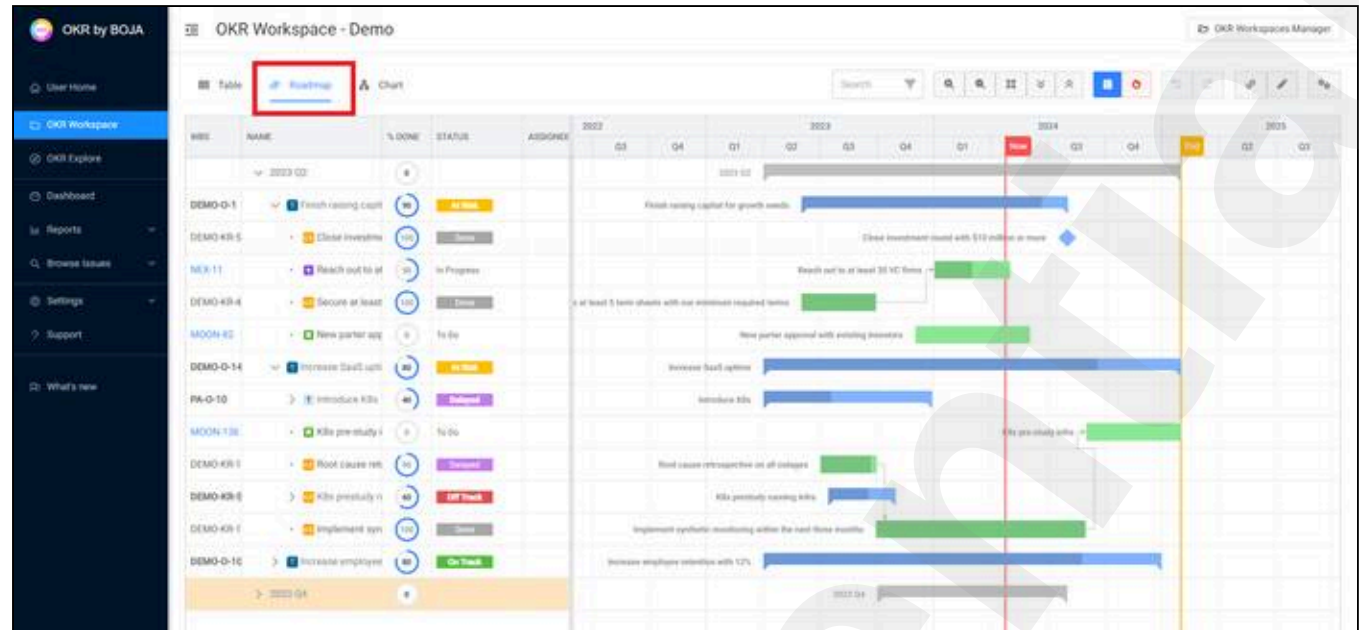
Create Column

Reset to Default Columns

| Objective and Key Result                           | Status * Wgt | Status * Wgt | Wgt | Lead         |
|----------------------------------------------------|--------------|--------------|-----|--------------|
| CMPA-0-1 Increase revenue                          | 0.7 (A)      | On Track     | 1   | Johan Brodin |
| PASO-1 SBOM Missing Packages                       | 0.4 (A)      | On Track     | 1   | Johan Brodin |
| KR PASR-20 Merge requests for all missing sent out | 0.2          | On Track     | 1   | Johan Brodin |
| CA-1 vendors                                       | 1            | Done         | 1   | Search Lead  |
| CA-1 New names reviewed                            | 1            | Done         | 1   | Search Lead  |
| CA-2 Kernel CPE added                              | 1            | Done         | 1   | Search Lead  |
| CA-2 Merge request to for all packages done        | 1            | Done         | 1   | Search Lead  |
| PASO-2 SBOM ACAP                                   | 0.7 (A)      | On Track     | 1   | Johan Brodin |
| WE-0-1 objective                                   | 1 (A)        | On Track     | 1   | Johan Brodin |
| CMPA-0-2 Improve quality                           | 0.3 (A)      | On Track     | 1   | Search Lead  |
| CMPA-0-3 Hire People                               | 0 (A)        | On Track     | 1   | Johan Brodin |

### 3.2.2 OKR Roadmap View

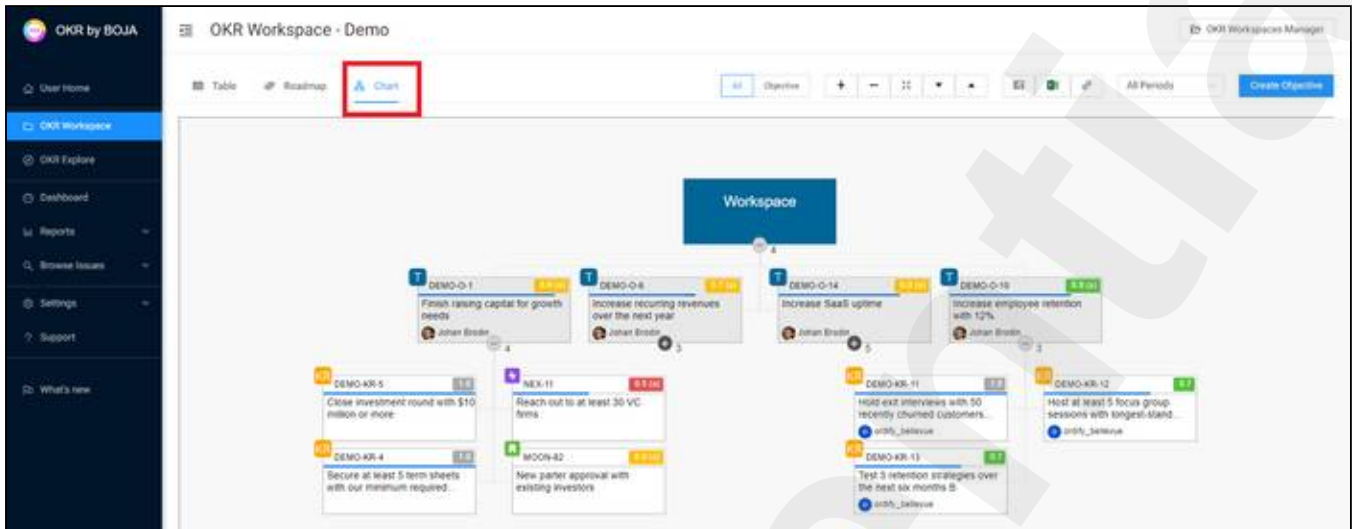
Visualise OKR timelines on best Gantt chart available from Brytum



### 3.2.3 OKR Chart View

The solution also supports working with OKRs in a graphical chart view. Toggle between table and chart in the top right switcher.

Click on OKRs to edit, view objectives or all OKRs, expand & collapse, zoom in & out and export to image.



## 3.3 OKR Progress - Manual Mode

OKRs and linked items (Jira, monday.com) progress can be set manually by users or automatic by OKR by BOJA. All can be toggled between manual and automatic mode and this page focus on the manual mode.

### 3.3.1 Grade & Status

Grade and status are set in the detail drawer or directly in the OKR table. OKR by BOJA supports the grade types Google, percent, binary and number. It enables users to fully map and track progress toward goals.

#### 3.3.1.1.1 Progress in detailed drawer

The screenshot shows the 'Edit Key Result' drawer for 'DEMO-KR-180'. The progress bar is at 70%. The status is 'On Track'. The grade type is set to 'Google'. The drawer also includes fields for 'Summary', 'Due Date', 'Lead', and 'Labels'. The background shows a list of OKRs in the workspace, with 'DEMO-KR-180' highlighted.

#### 3.3.1.1.2 Progress in OKR table

The screenshot shows the OKR table with columns: Progress, Grade, Status, Wgt, Lead, and DueDate. The table lists several OKRs, including 'DEMO-KR-150' which has a progress of 90% and a status of 'On Track'. A red box highlights the '90%' progress value.

| Progress | Grade    | Status | Wgt          | Lead    | DueDate |
|----------|----------|--------|--------------|---------|---------|
| 40% (a)  | On Track | 1      | Johan Brodin | 2025-04 |         |
| 90%      | On Track | 1      | Johan Brodin | 2024-01 |         |
| 0%       | On Track | 1      | Johan Brodin | 2025-04 |         |
| 0%       | On Track | 1      | Johan Brodin | 2025-04 |         |
| 70%      | On Track | 1      | Johan Brodin | 2025-04 |         |
| 23% (a)  | Delayed  | 1      | Johan Brodin | 2025-01 |         |
| 0% (a)   | At Risk  | 1      | Johan Brodin | 2024-01 |         |

#### 3.3.1.2 Status types

OKR by BOJA comes with pre-defined status "On Track", "At Risk", Off-Track and Done. Create and manage statuses in the status settings manager.

## 3.4 OKR Progress - Automatic Mode

OKRs and linked items (Jira, monday.com) progress can be set manually by users or automatic by OKR by BOJA. All can be toggled between manual and automatic mode and this page focus on the automatic mode.

### Automatic Mode

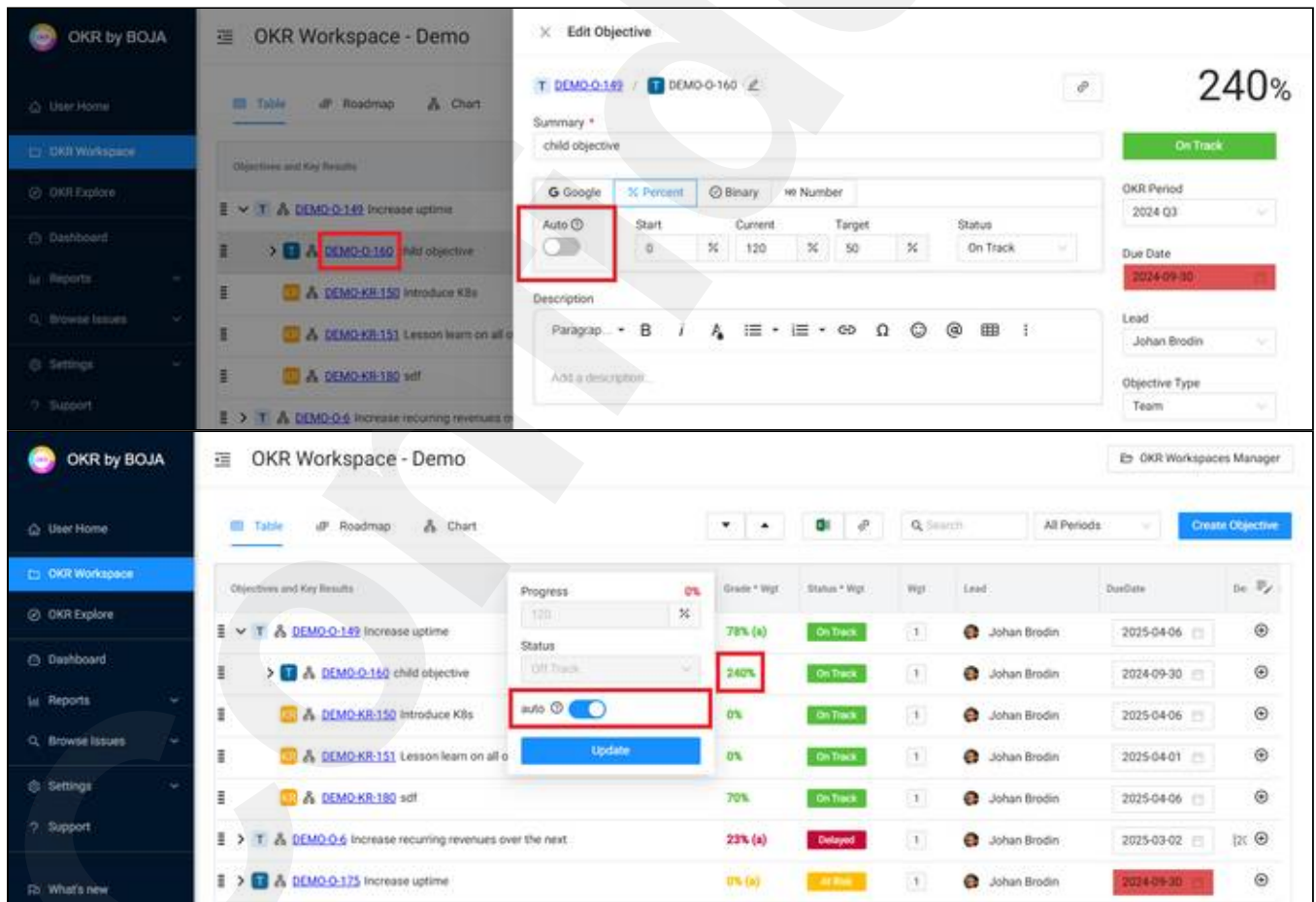
1. Calculation OKRs with children
2. Calculation linked Jira issues
3. Calculation linked monday.com items
4. OKR Threshold auto Status (grade & due-date)

#### 3.4.1 Automatic Mode

In automatic mode (auto) the solution calculates grade and status automatically based on child items grade and status. Example of child items are key results or linked Jira and monday.com items.

All items can be toggled between manual and auto mode. In the OKR table auto items have a post-fix (a) in the grade column.

##### 3.4.1.1 Toggle between manual and auto progress mode



The screenshot displays the OKR by BOJA interface. The top section shows the 'Edit Objective' modal for 'DEMO-O-160'. The modal includes a summary, a progress bar at 240%, and a table with columns: Start, Current, Target, and Status. The 'Auto' toggle is set to 'On'. The bottom section shows the 'OKR Workspace - Demo' table with columns: Progress, Grade + Wgt, Status + Wgt, Wgt, Lead, DueDate, and De. The table lists several objectives, including 'DEMO-O-160' which is highlighted with a red box around the 'Auto' toggle and the '240%' progress value.

| Progress          | Grade + Wgt | Status + Wgt | Wgt | Lead         | DueDate    | De   |
|-------------------|-------------|--------------|-----|--------------|------------|------|
| 120%              | 78% (a)     | On Track     | 1   | Johan Brodin | 2025-04-06 |      |
| Status: Off Track | 240%        | On Track     | 1   | Johan Brodin | 2024-09-30 |      |
| auto: On          | 0%          | On Track     | 1   | Johan Brodin | 2025-04-06 |      |
|                   | 0%          | On Track     | 1   | Johan Brodin | 2025-04-01 |      |
|                   | 70%         | On Track     | 1   | Johan Brodin | 2025-04-06 |      |
|                   | 23% (a)     | Delayed      | 1   | Johan Brodin | 2025-03-02 | [20] |
|                   | 0% (a)      | At Risk      | 1   | Johan Brodin | 2024-09-30 |      |

##### 3.4.1.2 1. Calculation OKRs with children

### **i** Grade calculation

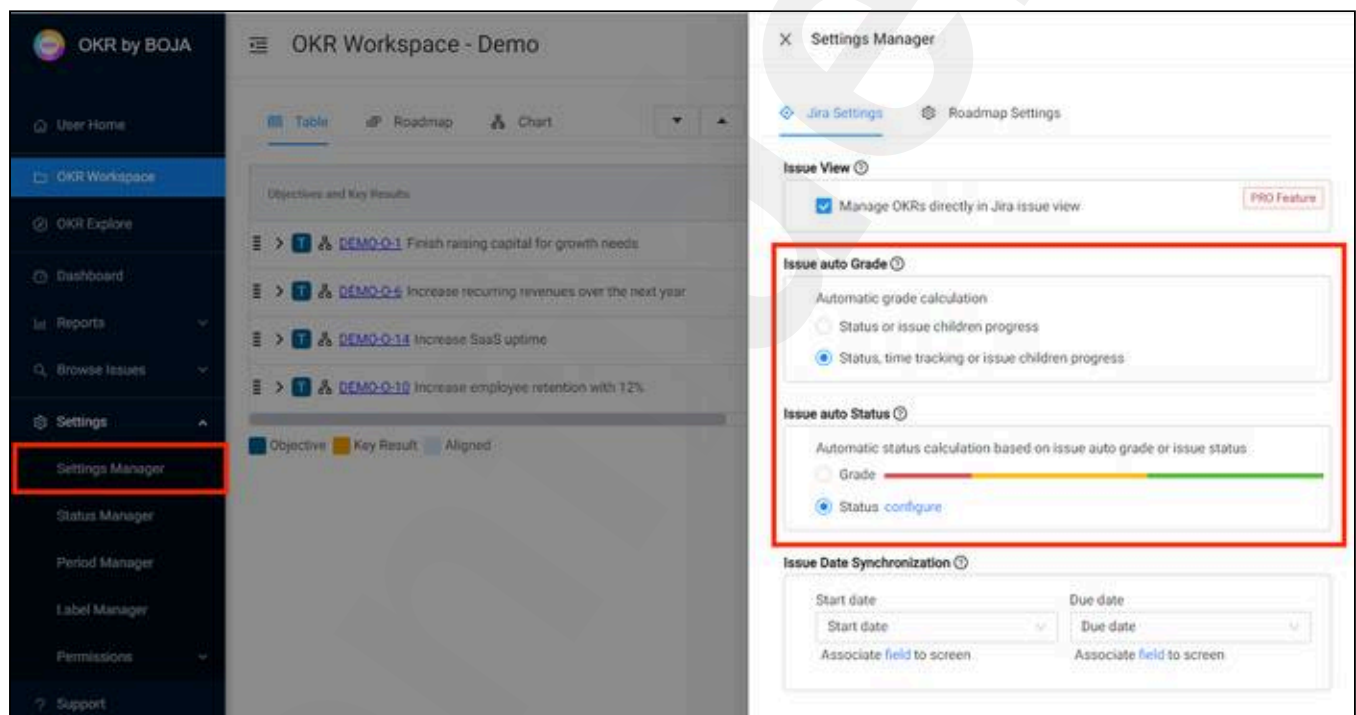
- Rounded average of all child grades

### Status calculation

- All statuses has a status category with a numeric value
  - 1 (on-track, done), 2 (at-risk), 3 (off-track)
- Status values from the children are summed up
- Then the total value is divided with num children and finally rounded to either 1, 2 or 3
  - As an example 2 on track and 1 at risk has a total status value of 4. That divided with number of OKRs which is 3 in this case is 1,33. Rounded to the closest integer is 1 which is status on-track.
- Finally if all children have the done status category the OKR is assigned to the done status

#### 3.4.1.3 2. Calculation linked Jira issues

Jira issues can be linked to both objectives and key results. The auto calculation for both grade and status are configured in the settings manager (see below)

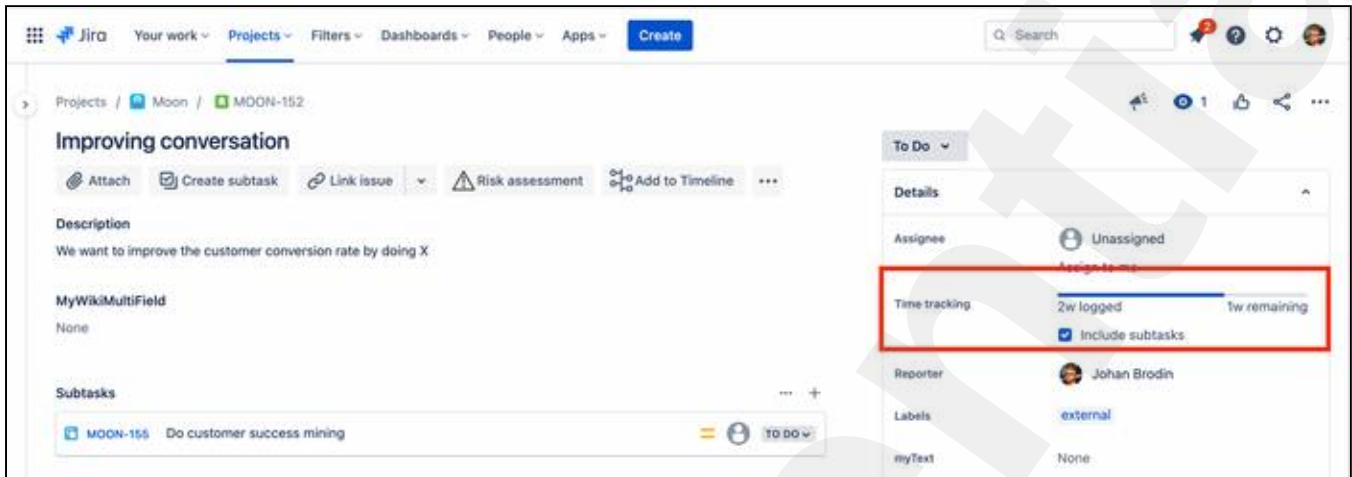


##### 3.4.1.3.1 Issue auto Grade

| Issue                                                                                                                                           | Grade (progress)    |
|-------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Issue in a Jira done status                                                                                                                     | 1                   |
| Epics issue (in-progress status) <ul style="list-style-type: none"> <li>• An Epic with 10 child issues with 7 done has the grade 0.7</li> </ul> | Jira Epic progress  |
| Issue with sub-tasks                                                                                                                            | Jira issue progress |

|                                                                                                           |                             |
|-----------------------------------------------------------------------------------------------------------|-----------------------------|
| <ul style="list-style-type: none"> <li>An issue 4 sub-tasks where 2 are done has the grade 0.5</li> </ul> |                             |
| Issue with time tracking (picture below)                                                                  | Jira time tracking progress |
| All other issues                                                                                          | 0                           |

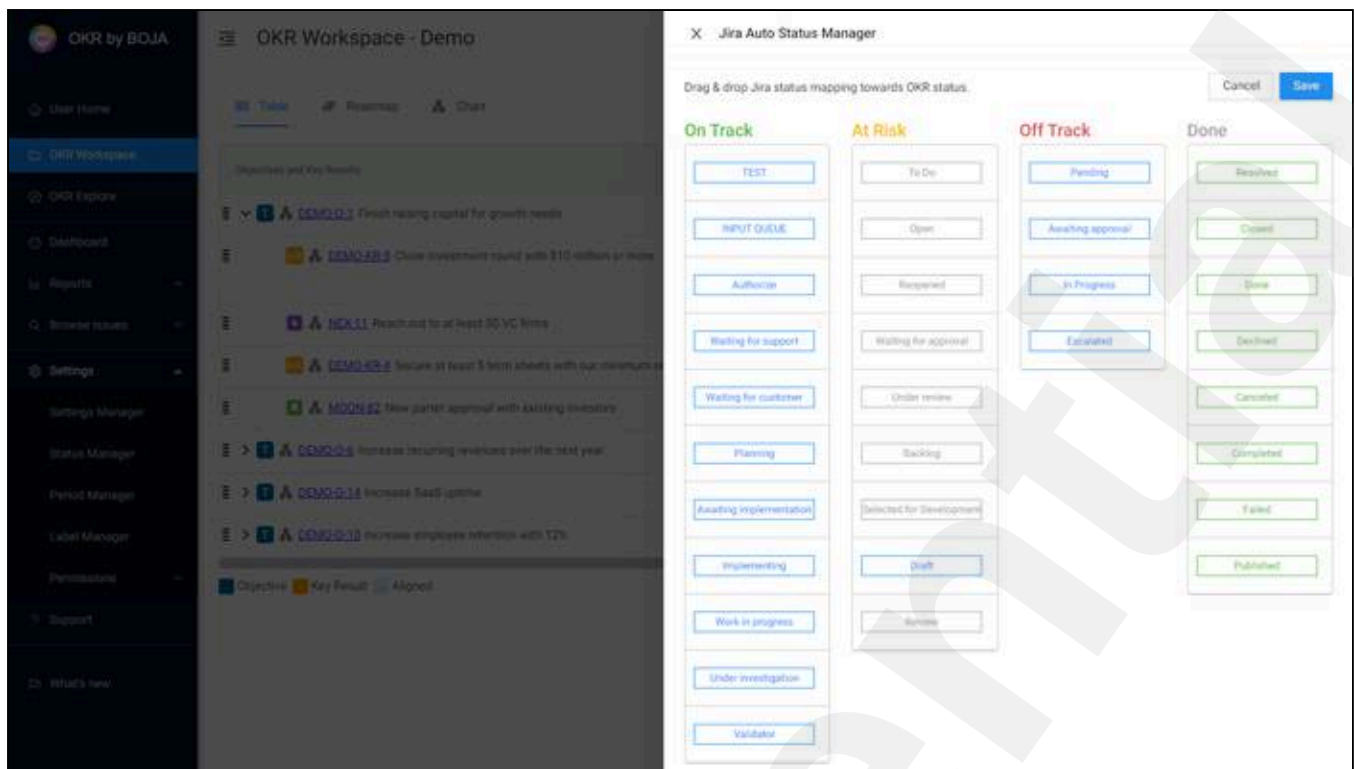
Example: Issue with time tracking



#### 3.4.1.3.2 Issue auto Status - based on issue grade (option 1 in settings manager)

| Grade (progress) | Status    |
|------------------|-----------|
| 0% - 19%         | Off Track |
| 20% - 59%        | At Risk   |
| 60%-99%          | On Track  |
| 100%             | Done      |

#### 3.4.1.3.3 Issue auto Status - based on Jira status mapped to OKR status (option 2 in settings manager)



### 3.4.1.4 3. Calculation linked monday.com items

Item grade and status are calculated according to below. Progress of items with sub-items are calculated based on the sub-items. All items can be switched between manual and automatic progress mode.

#### Grade calculation

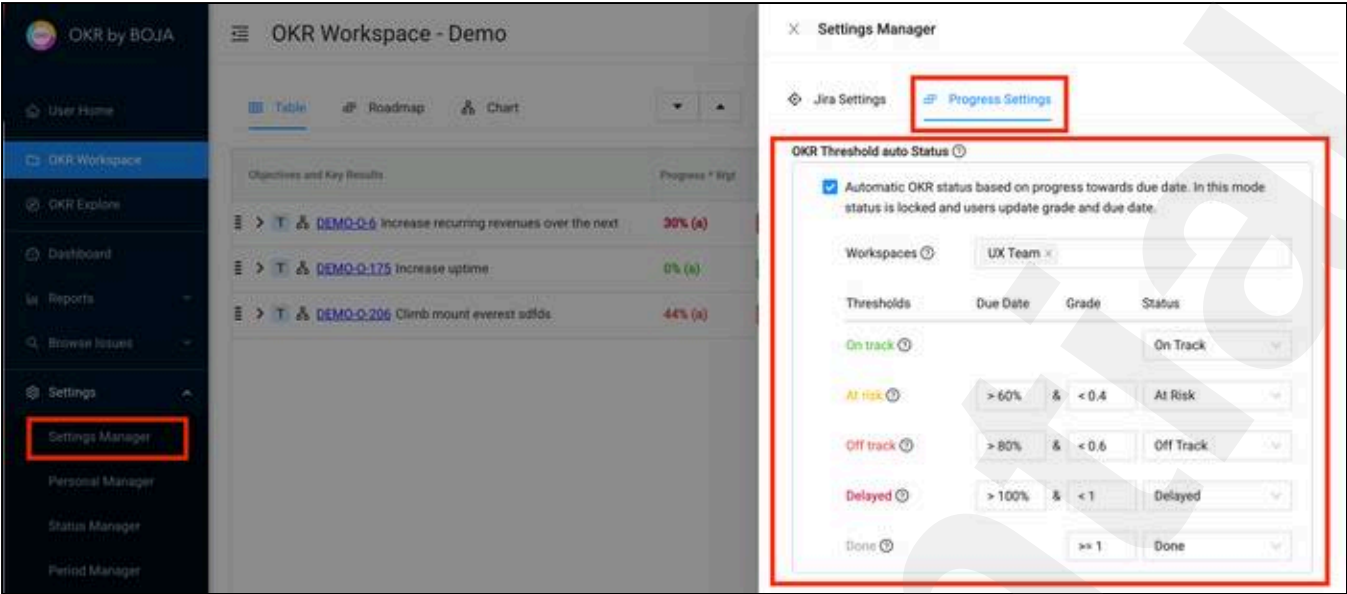
| Items                                                         | Grade (progress)                                   |
|---------------------------------------------------------------|----------------------------------------------------|
| Number of done status columns divided with all status columns | 0% - 100%<br>(1 done with 4 status columns is 25%) |
| Items without done columns                                    | 0                                                  |

#### Status calculation

| Grade (progress) | Status    |
|------------------|-----------|
| 0% - 19%         | Off Track |
| 20% - 59%        | At Risk   |
| 60%-99%          | On Track  |
| 100%             | Done      |

### 3.4.1.5 4. Calculation OKR auto Status (grade & due-date)

In OKR auto Status users cannot set status manually. Progress status is automatically calculated based on grade and time left to item due date configured in the settings manager.



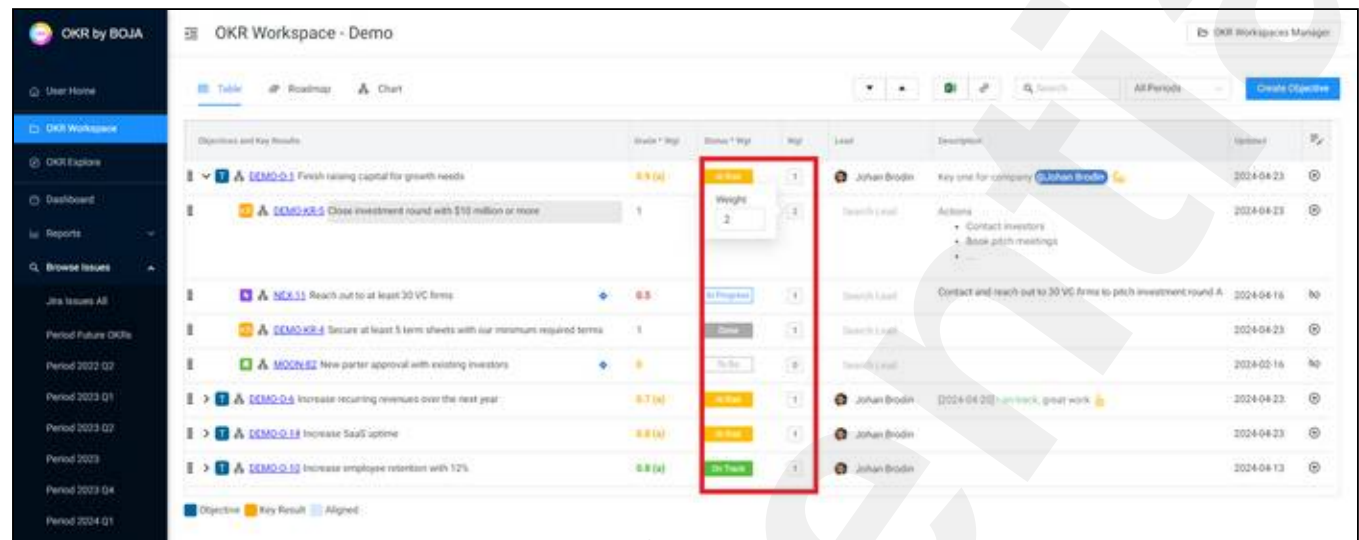
| Example Calculation |          |         |          |  |                                                                                                             |
|---------------------|----------|---------|----------|--|-------------------------------------------------------------------------------------------------------------|
| Thresholds          | Due Date | Grade   | Status   |  | Example                                                                                                     |
| On track            |          |         | On Track |  | If more then 60% of task duration has been consumed, and if grade is less then 50%, then set status At Risk |
| At risk             | > 60%    | & < 0.4 | At Risk  |  |                                                                                                             |

OKR Threshold auto Status.mov

### 3.5 OKR Weight

OKR weight allows users to mimic that some OKRs are more important then others. Default weight is one (1) and are set on all items. They are used auto calculating parent progress.

#### 3.5.1 Set weight - option 1



#### 3.5.2 Set weight - option 2

OKR by BOJA

User Home

OKR Workspace

OKR Explore

Dashboard

Reports

Browse Issues

Jira Issues All

Period Future OKRs

Period 2022 Q1

Period 2023 Q1

Period 2023 Q2

Period 2023

Period 2023 Q4

OKR Workspace - Demo

Table

Roadmap

Chart

Search

All Periods

Create Objective

| Objectives and Key Results                                                                                                                                                                                                                                                                   | Grade 1 Wgt | Status 1 Wgt | Wgt | Lead | Summary | Updated |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|--------------|-----|------|---------|---------|--|
| <div>OKMO-Q-1</div> <div>Finish raising capital for growth needs</div> <div>0.5 (a)</div> <div>On Hold</div> <div>1</div> <div>Johan Brodin</div> <div>Key unit for company</div> <div>0.5 Johan Brodin</div> <div>2024-04-23</div> <div></div>                                              |             |              |     |      |         |         |  |
| <div>OKMO-KR-5</div> <div>Close investment round with \$10 million or more</div> <div>1</div> <div>Done</div> <div>2</div> <div>Search Lead</div> <div> <div>Actions</div> <div> <div>Contact investors</div> <div>Book pitch meetings</div> </div> </div> <div>2024-04-23</div> <div></div> |             |              |     |      |         |         |  |
| <div>HEX-11</div> <div>Reach out to at least 30 VC firms</div> <div>6.5</div> <div>In Progress</div> <div>3</div> <div>Search Lead</div> <div>Contact and reach out to 30 VC firms to pitch investment round</div> <div>2024-04-23</div> <div></div>                                         |             |              |     |      |         |         |  |
| <div>OKMO-KR-3</div> <div>Secure at least 5 term sheets with our minimum required terms</div> <div>1</div> <div>Done</div> <div>4</div> <div>Search Lead</div> <div></div> <div>2024-04-23</div> <div></div>                                                                                 |             |              |     |      |         |         |  |
| <div>MOON-82</div> <div>New partner approval with existing investors</div> <div>9</div> <div>On Hold</div> <div>9</div> <div>Search Lead</div> <div></div> <div>2024-04-23</div> <div></div>                                                                                                 |             |              |     |      |         |         |  |
| <div>OKMO-Q-6</div> <div>Increase recurring revenues over the next year</div> <div>0.7 (a)</div> <div>On Hold</div> <div>1</div> <div>Johan Brodin</div> <div>2024-04-20</div> <div>See track, great work</div> <div>2024-04-23</div> <div></div>                                            |             |              |     |      |         |         |  |
| <div>OKMO-Q-18</div> <div>Increase SaaS uptime</div> <div>0.8 (a)</div> <div>On Hold</div> <div>3</div> <div>Johan Brodin</div> <div></div> <div>2024-04-23</div> <div></div>                                                                                                                |             |              |     |      |         |         |  |
| <div>OKMO-Q-10</div> <div>Increase employee retention with 12%</div> <div>0.8 (a)</div> <div>On Hold</div> <div>4</div> <div>Johan Brodin</div> <div></div> <div>2024-04-13</div> <div></div>                                                                                                |             |              |     |      |         |         |  |

Objective

Key Result

Aligned

Custom Weights

OKMO-Q-1

Finish raising capital for growth needs

0.7

| Contribute                                                                                                                             | Weight | Impact | Grade |
|----------------------------------------------------------------------------------------------------------------------------------------|--------|--------|-------|
| <div>OKMO-KR-5</div> <div>Close investment round with \$10 million or more</div> <div>2</div> <div>25%</div> <div>1</div>              |        |        |       |
| <div>HEX-11</div> <div>Reach out to at least 30 VC firms</div> <div>5</div> <div>60%</div> <div>0.5</div>                              |        |        |       |
| <div>OKMO-KR-3</div> <div>Secure at least 5 term sheets with our minimum required terms</div> <div>1</div> <div>10%</div> <div>1</div> |        |        |       |
| <div>MOON-82</div> <div>New partner approval with existing investors</div> <div>0</div> <div>0%</div> <div>0</div>                     |        |        |       |

Adjust children weights to balance grade and status. New children are assigned weight one.

Save

### 3.5.3 Set weight - option 3

## 3.6 OKR Custom Fields

Custom fields extend OKR by BOJA with company specific editable fields. Fields are injected directly in OKRs, Jira issues, monday.com items as well as columns in the OKR table. Create and manage them in settings.

### 3.6.1 Custom Fields in a OKR

The screenshot shows the 'Edit Objective' dialog in the OKR Workspace. The dialog has a 'Description' field with a rich text editor. Below the description, there are three custom fields (CF) highlighted with red boxes: 'Text multi-line (CF)' with the value 'User editable text custom field...', 'User picker (CF)' with the value 'johan.b.brodin', and 'Date picker (CF)' with the value '2025-01-08'. The 'Delete' button is at the bottom right.

### 3.6.2 Custom Fields in OKR table (add in column manager)

The screenshot shows the OKR table in the OKR Workspace. The table has columns for 'Objectives and Key Results', 'Status + Wgt', 'Wgt', and three custom fields: 'Text multi-line (CF)', 'User picker (CF)', and 'Date picker (CF)'. A red box highlights the custom fields section. The table shows several objectives and key results with their status and weights.

| Objectives and Key Results                 | Status + Wgt | Wgt | Text multi-line (CF)               | User picker (CF) | Date picker (CF) |
|--------------------------------------------|--------------|-----|------------------------------------|------------------|------------------|
| DEMO-O-1 Finish raising capital for growth | On Track     | 1   | User editable text custom field... | johan.b.brodin   | 2025-01-08       |
| DEMO-O-56 chills objective                 | On Track     | 1   |                                    |                  | Select date      |
| DEMO-KR-55 my kr                           | On Track     | 1   | Another custom field...            | erik.larsson     | 2025-01-09       |
| DEMO-KR-131 hej                            | At Risk      | 1   |                                    |                  | Select date      |
| DEMO-O-10 Increase retention rates         | On Track     | 1   |                                    |                  | 2025-01-13       |
| DEMO-O-14 Increase uptime                  | On Track     | 1   |                                    |                  | Select date      |
| DEMO-O-144 Q3 2023 objective               | On Track     | 1   |                                    |                  | Select date      |

## 3.7 Align & Assign OKRs

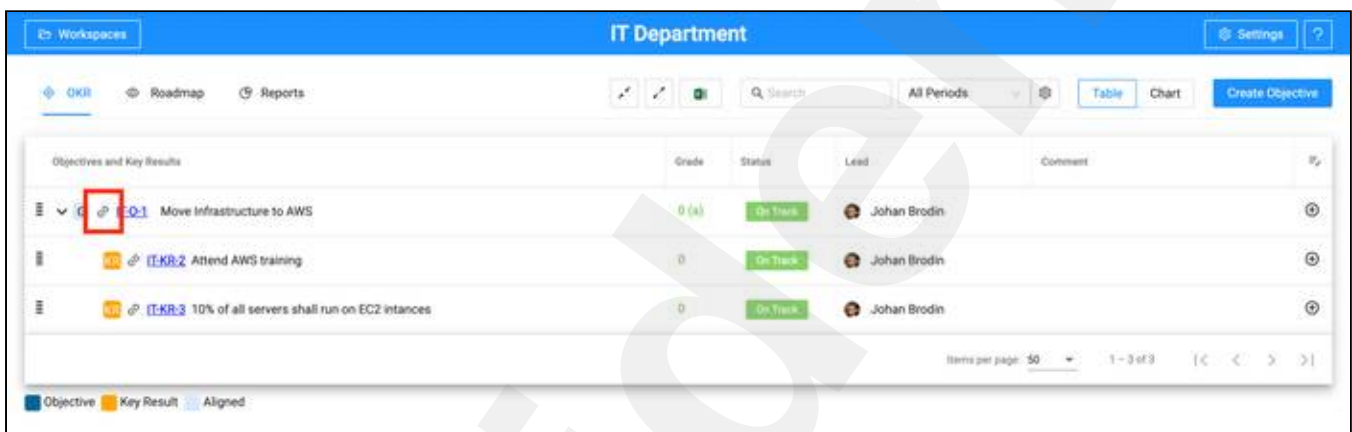
Align and Assign OKRs to other workspaces with a few clicks. Then use the graphical alignment view to see the bigger picture on how OKRs are aligned to other OKRs and overall goals.

As one of few solutions Align OKR supports multi OKR alignment and assignments. As an example this means that a team can align its OKRs both to the department as well as company OKRs (upstream). And that a manager can assign dedicated key result to individuals or teams (downstream)

- View Alignments
- Align Objective (upstream)
- Assign Keyresult (downstream)

### 3.7.1 View Alignments

Click the OKR align icon to view how the OKR is aligned to OKRs in other workspaces.



| Objectives and Key Results                            | Grade | Status   | Lead         | Comment |
|-------------------------------------------------------|-------|----------|--------------|---------|
| IT-O-1 Move Infrastructure to AWS                     | 0 (A) | On Track | Johan Brodin |         |
| IT-KR-2 Attend AWS training                           | 0     | On Track | Johan Brodin |         |
| IT-KR-3 10% of all servers shall run on EC2 instances | 0     | On Track | Johan Brodin |         |

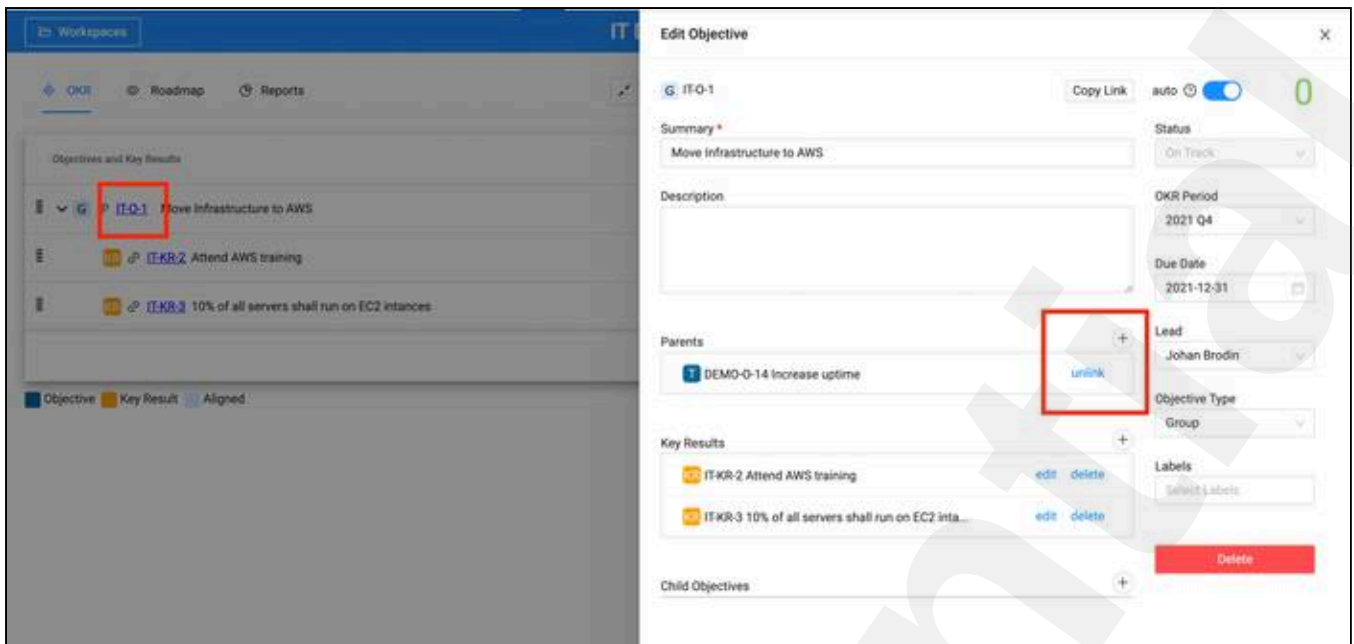
The selected OKR is highlighted with a red box. Below you can see how the IT Department “Move Infrastructure to AWS” Objective (IT-O-1) is aligned to the “Increase Uptime” Objective (DEMO-O-14). Switch between viewing only objectives and including key results.



### 3.7.2 Align Objective (upstream)

Objectives can be aligned to other objectives or key results in two ways.

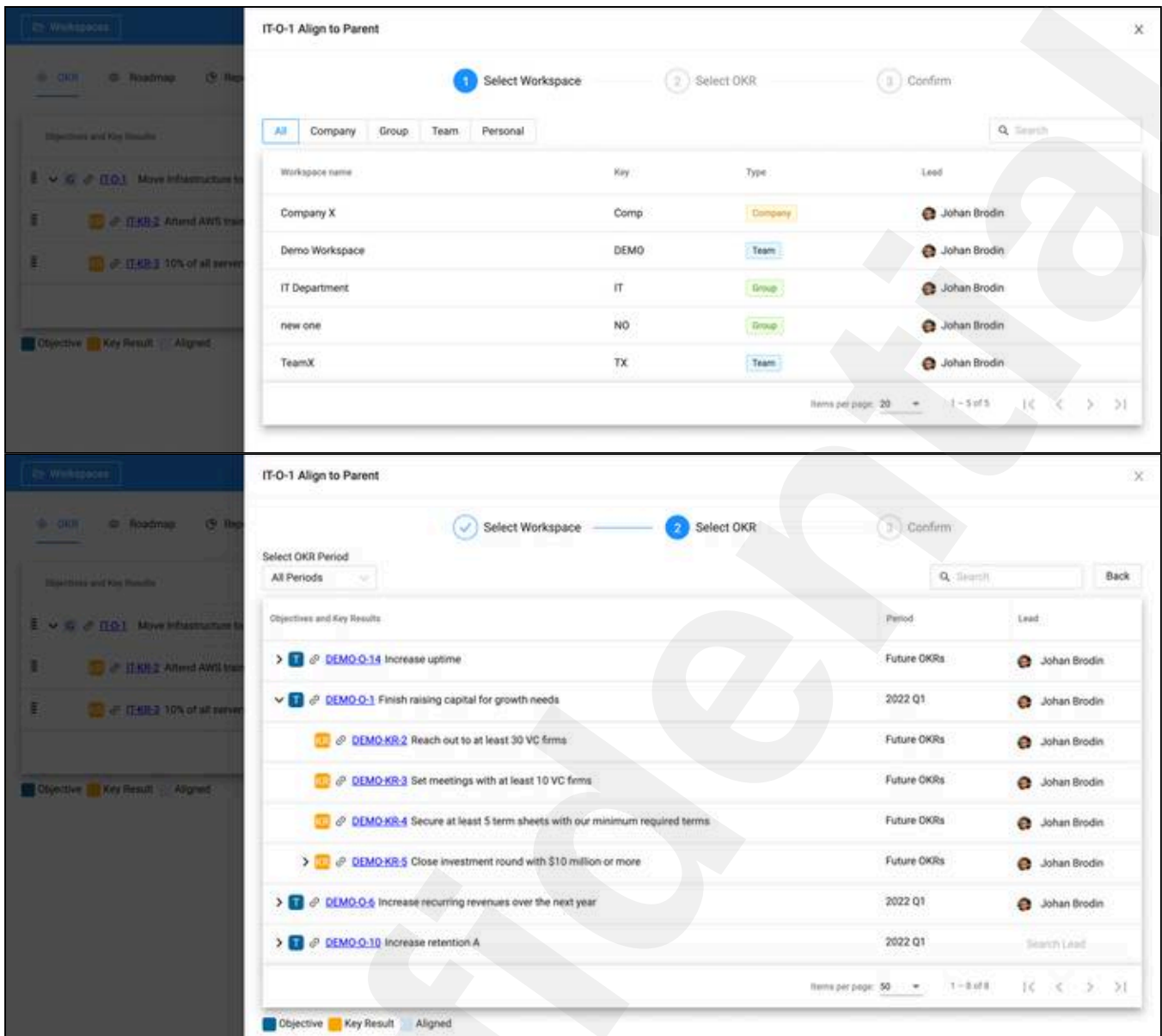
- Press the objective identifier link and then the parents plus button.



- Or press the objective alignment icon and then “Align to Parent”



Then select the target workspace (can be both a remote workspace and the active one). Finally select the objective or key result you want to align to.

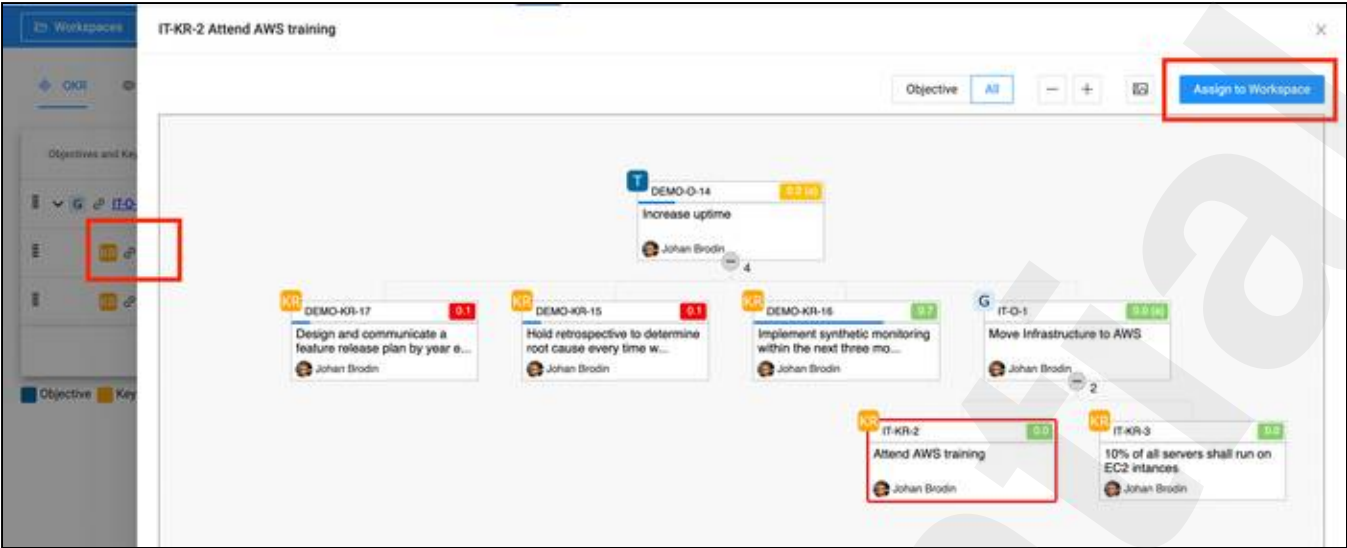


### 3.7.3 Assign Keyresult (downstream)

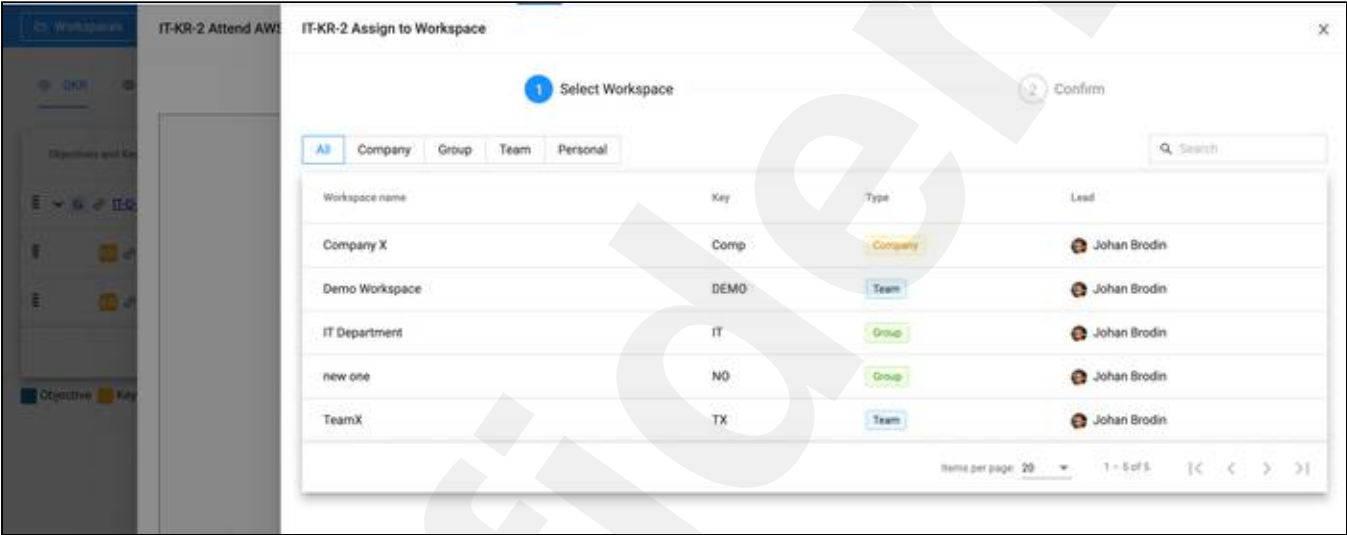
A key result can be assigned to another workspace. In that workspace a new objective will be created aligned to the assigned key result.

The typical use case is to assign key results from top workspaces to team or personal workspaces. That can be a manager assigning to employees or departments to various teams.

- Press the key result alignment icon and select "All" to see the key results (Objective/All switch)
- Press the "Assign to Workspace" button



- Finally select the workspace to assign the key result to



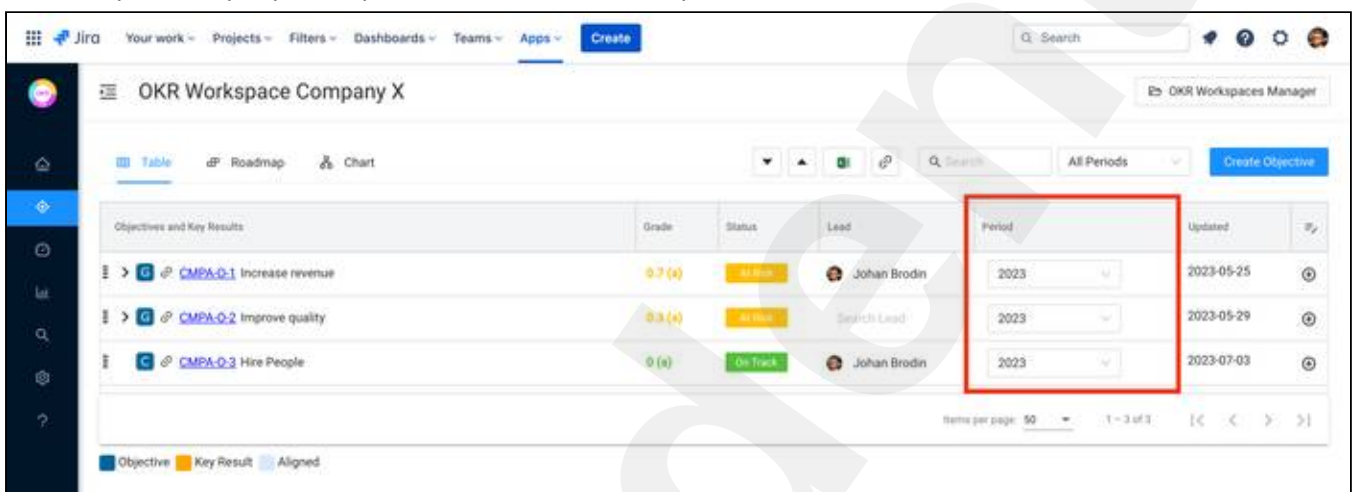
## 3.8 Yearly Company OKRs

Yearly company OKRs with group, teams and individual working on a quarterly OKR cadence is best practice. Boja OKR fully support this way of working!

- Company Workspace
- Group/Team/Personal Workspace
- Reporting Yearly OKRs

### 3.8.1 Company Workspace

- In the OKR period manager create a yearly period e.g. 2023 (your Jira admin)
- In your company workspace create OKRs with the period 2023



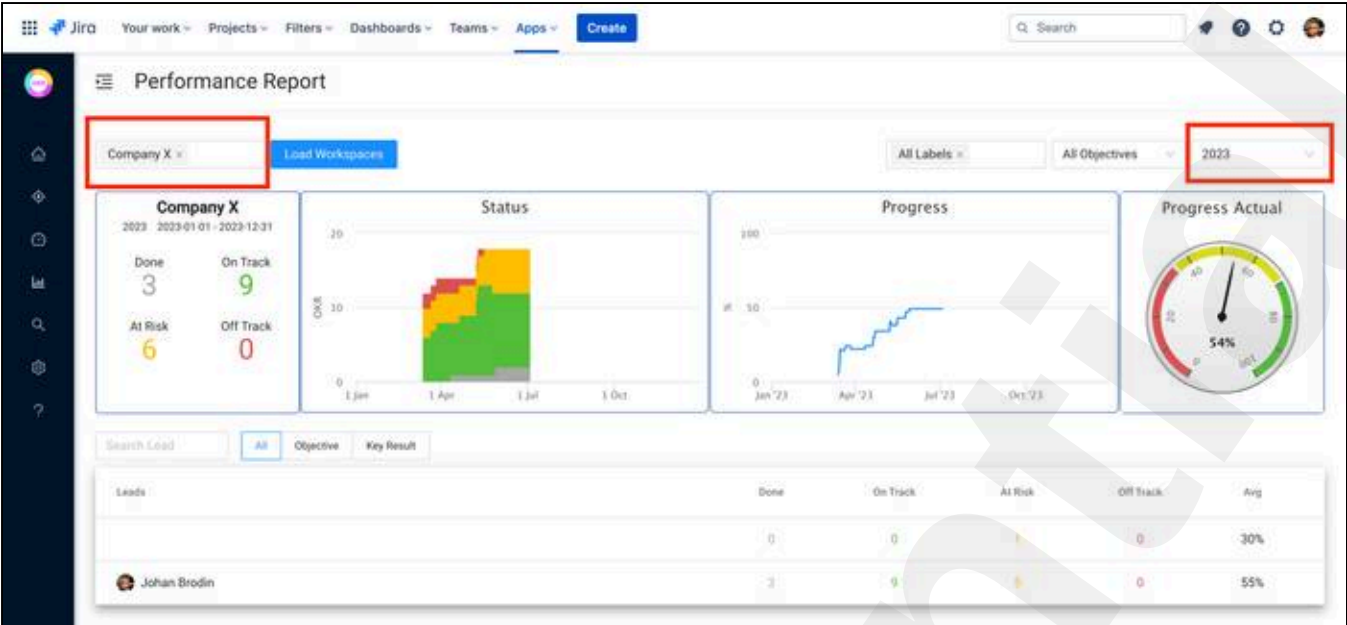
| Objectives and Key Results    | Grade   | Status   | Lead         | Period | Updated    |
|-------------------------------|---------|----------|--------------|--------|------------|
| > G CMPA-Q-1 Increase revenue | 0.7 (x) | At Risk  | Johan Brodin | 2023   | 2023-05-25 |
| > G CMPA-Q-2 Improve quality  | 0.3 (x) | At Risk  | Search Lead  | 2023   | 2023-05-29 |
| C CMPA-Q-3 Hire People        | 0 (x)   | On Track | Johan Brodin | 2023   | 2023-07-03 |

### 3.8.2 Group/Team/Personal Workspace

- In the OKR period manager create a quarter period e.g. Q1 2023 (your Jira admin)
- In the child group/team/personal workspace create OKRs with the period Q1 2023
- Align those OKRs to the relevant company 2023 OKRs

### 3.8.3 Reporting Yearly OKRs

In the performance report select the previous company workspace and period 2023. Then all OKRs including the aligned child workspace OKRs are shown. This is a very powerful view to keep track of how overall OKR status are trending toward the company objectives.



## 3.9 External Links

Quickly copy and share links to OKRs, workspaces and roadmaps. There are multiple link icons throughout the solution copying the link to clipboard.

### 3.9.1 Examples

The top screenshot shows the 'Workspace Company Z' dashboard. It features a table of objectives and key results. A red box highlights a link icon in the top right corner of the table.

| Objectives and Key Results                                           | Grade   | Status    | Lead         | Comment         |
|----------------------------------------------------------------------|---------|-----------|--------------|-----------------|
| DEMO-Q-14 Increase uptime                                            | 0.3 (A) | At Risk   | Johan Brodin | IT to take lead |
| DEMO-KR-17 Design and communicate a feature release plan by year end | 0.1     | Off Track | Johan Brodin |                 |

The bottom screenshot shows the 'Edit Objective' form for 'DEMO-Q-160'. A red box highlights a link icon in the top right corner of the form. The form includes fields for 'Summary', 'Description', 'Start', 'Current', 'Target', 'Status', 'Lead', and 'Objective Type'. The 'Status' is 'On Track' and the 'Lead' is 'Johan Brodin'.

### 3.10 Restore OKR

Deleted OKRs can be restored from bin. Restoring OKRs with child key results or child okrs also restore all children.

 OKR by BOJA

User Home

OKR Workspace

OKR Explore

Dashboard

Reports

Browse Issues

Support

Settings

Bin

What's new

Bin

Tip: Objectives are restored with its key results

Search

Empty Bin

| Objectives and Key Results                                                                              | Deleted by                                                                                     | Deleted at         | Actions                 |
|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|--------------------|-------------------------|
|  SG-O-8 secret goal 3  |  Johan Brodin | 12 Feb 2025, 17:47 | <a href="#">restore</a> |
|  SG-KR-10 sdf          |  Johan Brodin | 12 Feb 2025, 17:47 | <a href="#">restore</a> |
|  SG-KR-9 f             |  Johan Brodin | 12 Feb 2025, 17:47 | <a href="#">restore</a> |
|  TEST-KR-353 b         |  Johan Brodin | 12 Feb 2025, 17:35 | <a href="#">restore</a> |
|  TEST-O-351 kalle anka |  Johan Brodin | 12 Feb 2025, 17:35 | <a href="#">restore</a> |
|  TEST-KR-352 a         |  Johan Brodin | 12 Feb 2025, 17:35 | <a href="#">restore</a> |
|  root-O-2 sdf          |  Johan Brodin | 12 Feb 2025, 17:33 | <a href="#">restore</a> |

## 3.11 Jira Features

OKR by BOJA integrates seamless with Jira

- Link Jira issues to OKRs
- Linked Jira issues searchable with JQL
- OKRs in Jira issue view
- Issue auto status and auto grading
- Issue dates synchronization to roadmap

### 3.11.1 Link Jira issues to OKRs

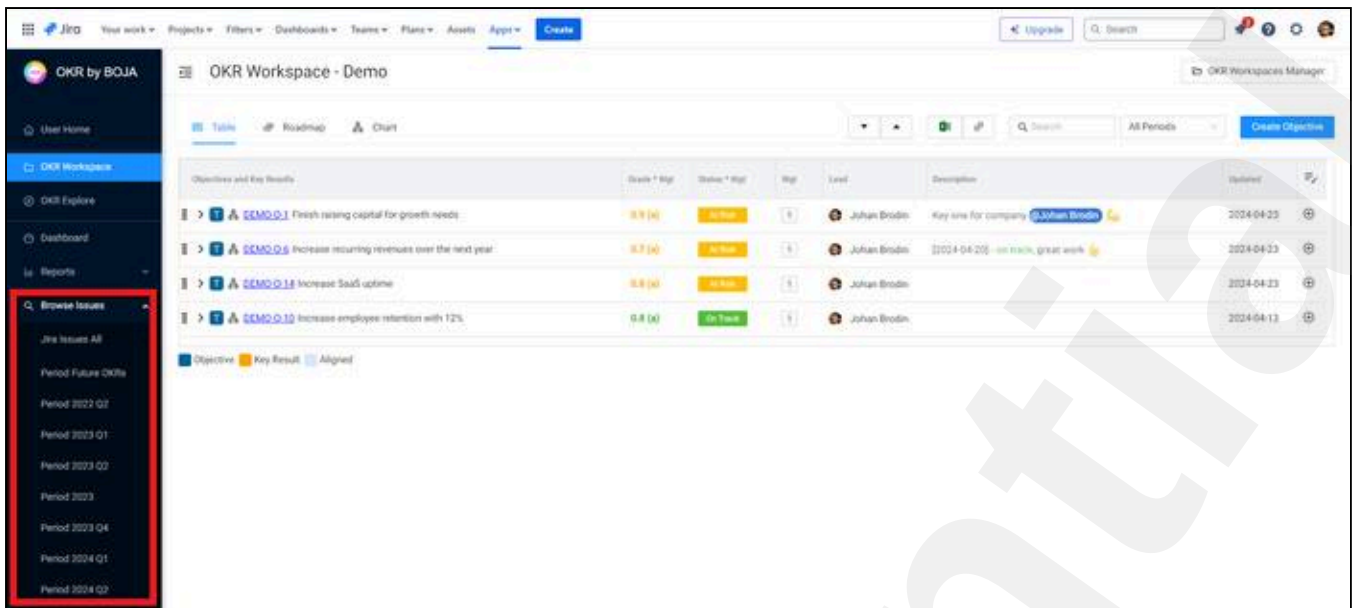
Jira Issues can be linked to both Objectives and Key results. You can link one Jira Issue to multiple OKRs however only one in a workspace. Please press the plus button to the right on the OKR row. Then either link an existing Jira Issue to that OKR or create a new one.

The top screenshot shows the 'OKR Workspace - Demo' interface. It features a table of OKRs with columns for Grade, Weight, Status, Level, and Description. A red box highlights the plus icon in the rightmost column of the first row. A second red box highlights the 'Link Jira Issue' option in the dropdown menu that appears.

The bottom screenshot shows the 'Link Jira Issue' modal. A red box highlights the 'Select Jira Issue' search bar, which contains a list of Jira issues. Another red box highlights the 'Link' button at the bottom right of the modal.

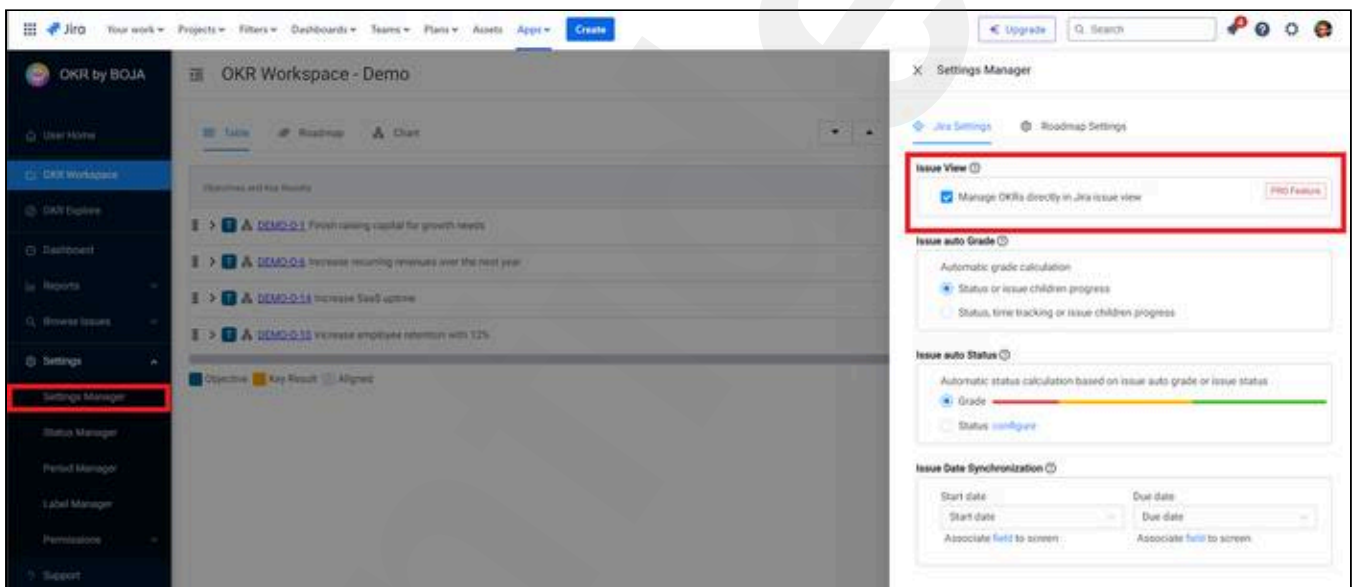
### 3.11.2 Linked Jira issues searchable with JQL

All linked issues are searchable with JQL with quick link as highlighted in the picture

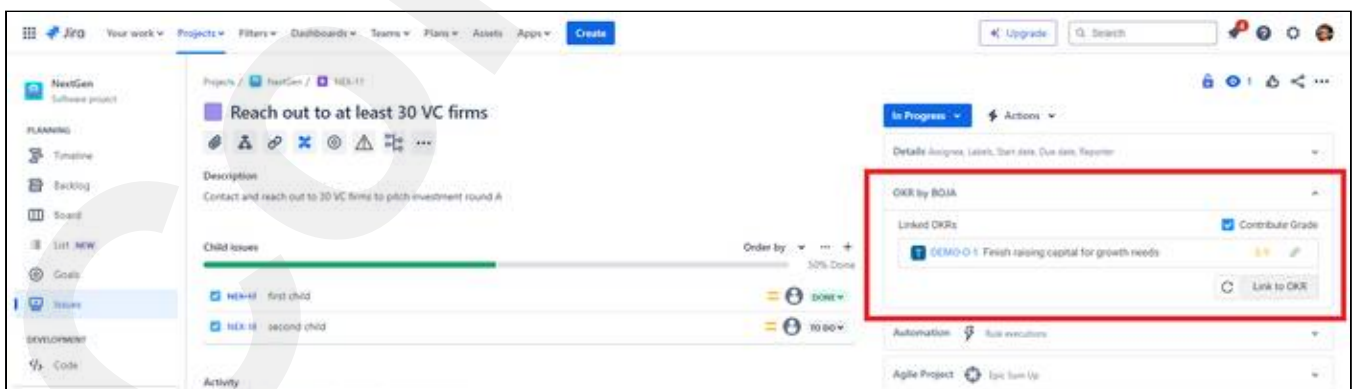


### 3.11.3 OKRs in Jira issue view

In “General Settings” please set “Show OKRs in Issue View”. All OKRs that the Issue is linked too is then showing up on the Issue view right panel. Clicking on any of those OKRs takes the user directly to the OKR in the app.



### Detailed Issue view



### 3.11.4 Issue auto status and auto grading

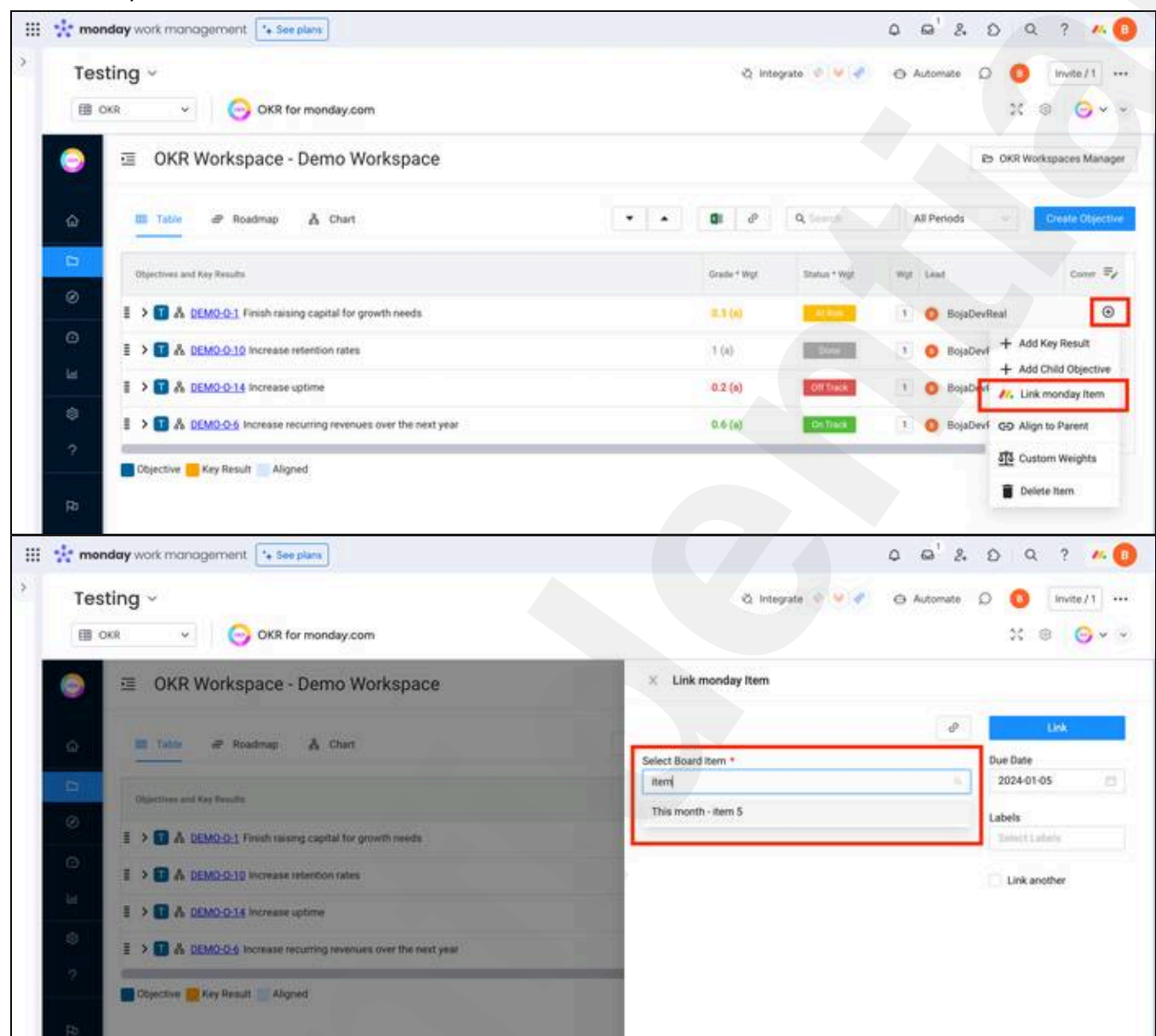
settings

### 3.11.5 Issue dates synchronization to roadmap

settings

### 3.12 monday.com Features

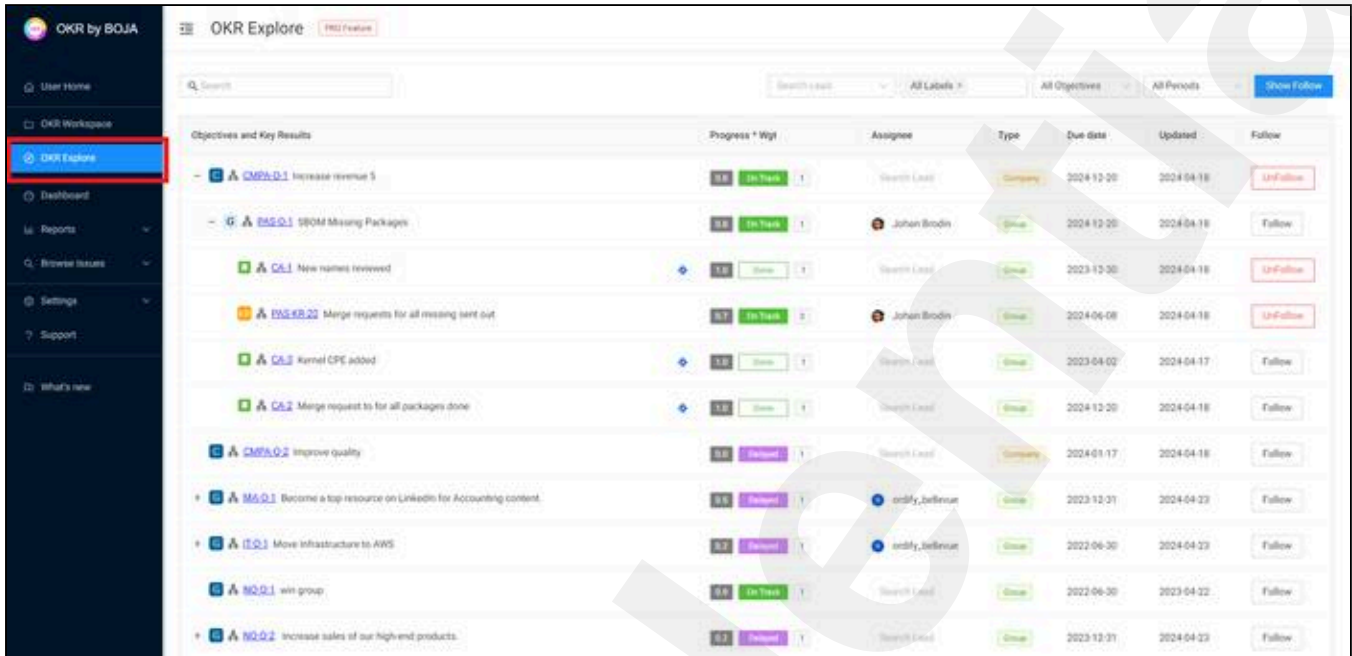
Link monday.com items to OKRs



## 4 Explore

Explore all OKR in one place. Quickly search and find OKRs among all available ones. Edit grade, status and weights directly in the explore table or jump to OKR workspace.

- Follow OKRs



| Objectives and Key Results                                      | Progress * Wgt | Assignee        | Type    | Due date   | Updated    | Follow   |
|-----------------------------------------------------------------|----------------|-----------------|---------|------------|------------|----------|
| CMPS.0.1 Increase revenue \$                                    | 0.8 On Track 1 | Search Lead     | Company | 2024-12-30 | 2024-04-18 | UnFollow |
| ESG.0.1 SBOM Missing Packages                                   | 0.8 On Track 1 | Johan Brodin    | Group   | 2024-12-30 | 2024-04-18 | Follow   |
| CA.1 New names reviewed                                         | 1.0 Done 1     | Search Lead     | Group   | 2023-12-30 | 2024-04-18 | UnFollow |
| PMS.0.2 Merge requests for all missing sent out                 | 0.7 On Track 2 | Johan Brodin    | Group   | 2024-06-08 | 2024-04-18 | UnFollow |
| CA.2 Kernel CPE added                                           | 1.0 Done 1     | Search Lead     | Group   | 2023-04-02 | 2024-04-17 | Follow   |
| CA.2 Merge request to for all packages done                     | 1.0 Done 1     | Search Lead     | Group   | 2024-12-30 | 2024-04-18 | Follow   |
| CMPS.0.2 Improve quality                                        | 0.8 Pending 1  | Search Lead     | Company | 2024-01-17 | 2024-04-18 | Follow   |
| MA.0.1 Become a top resource on LinkedIn for Accounting content | 0.8 Pending 1  | ordly, bellieur | Group   | 2023-12-31 | 2024-04-23 | Follow   |
| IS.1 Move infrastructure to AWS                                 | 0.2 Pending 1  | ordly, bellieur | Group   | 2022-06-30 | 2024-04-23 | Follow   |
| NS.0.1 win group                                                | 0.8 On Track 1 | Search Lead     | Group   | 2022-06-30 | 2023-04-22 | Follow   |
| NS.0.2 Increase sales of our highest products                   | 0.2 Pending 1  | Search Lead     | Group   | 2023-12-31 | 2024-04-23 | Follow   |

### 4.1 Follow OKRs

In the explore table users can mark and follow individual OKRs. Followed OKRs are available as:

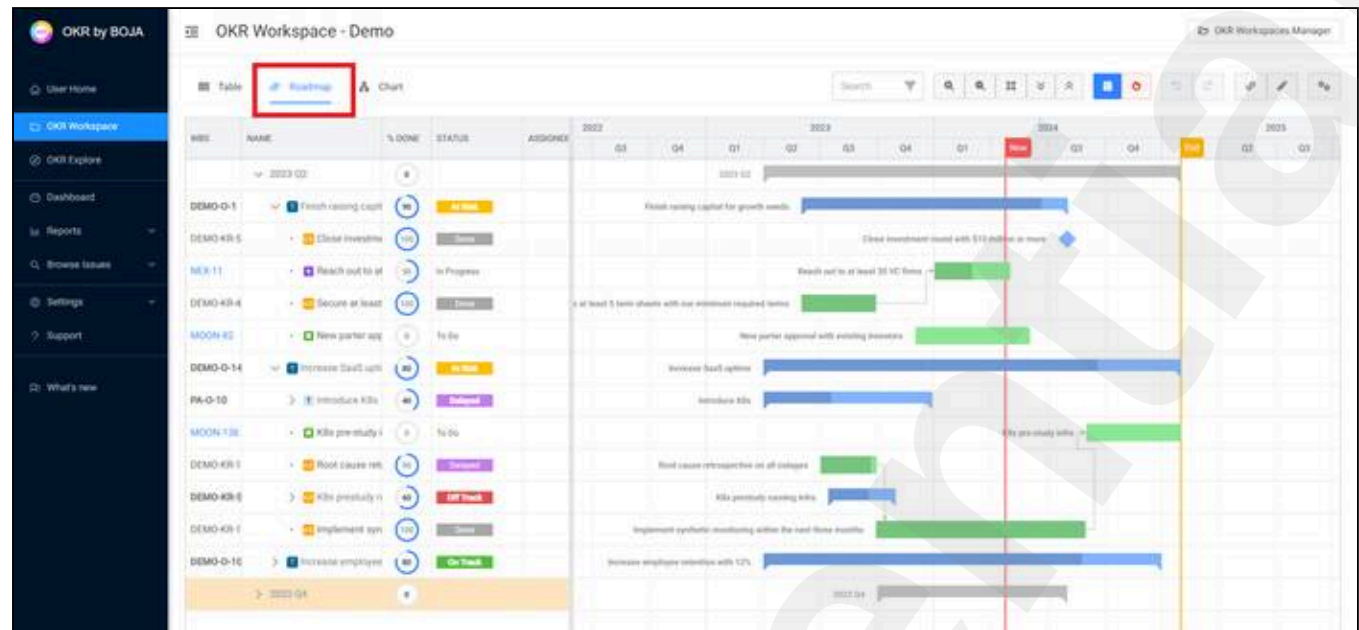
- Follow OKR filter directly in the OKR table
- Follow OKR custom report
- Follow email notifications on OKR updates configurable in settings



| Objectives and Key Results                      | Progress * Wgt | Assignee     | Type    | Due date   | Updated    | Follow   |
|-------------------------------------------------|----------------|--------------|---------|------------|------------|----------|
| CMPS.0.1 Increase revenue \$                    | 0.8 On Track 1 | Search Lead  | Company | 2024-12-30 | 2024-04-18 | UnFollow |
| ESG.0.1 SBOM Missing Packages                   | 0.8 On Track 1 | Johan Brodin | Group   | 2024-12-30 | 2024-04-18 | Follow   |
| CA.1 New names reviewed                         | 1.0 Done 1     | Search Lead  | Group   | 2023-12-30 | 2024-04-18 | UnFollow |
| PMS.0.2 Merge requests for all missing sent out | 0.7 On Track 2 | Johan Brodin | Group   | 2024-06-08 | 2024-04-18 | UnFollow |
| CA.2 Kernel CPE added                           | 1.0 Done 1     | Search Lead  | Group   | 2023-04-02 | 2024-04-17 | Follow   |
| CA.2 Merge request to for all packages done     | 1.0 Done 1     | Search Lead  | Group   | 2024-12-30 | 2024-04-18 | Follow   |

# 5 Roadmap

Visualise OKR timelines on best Gantt chart available from Brytum

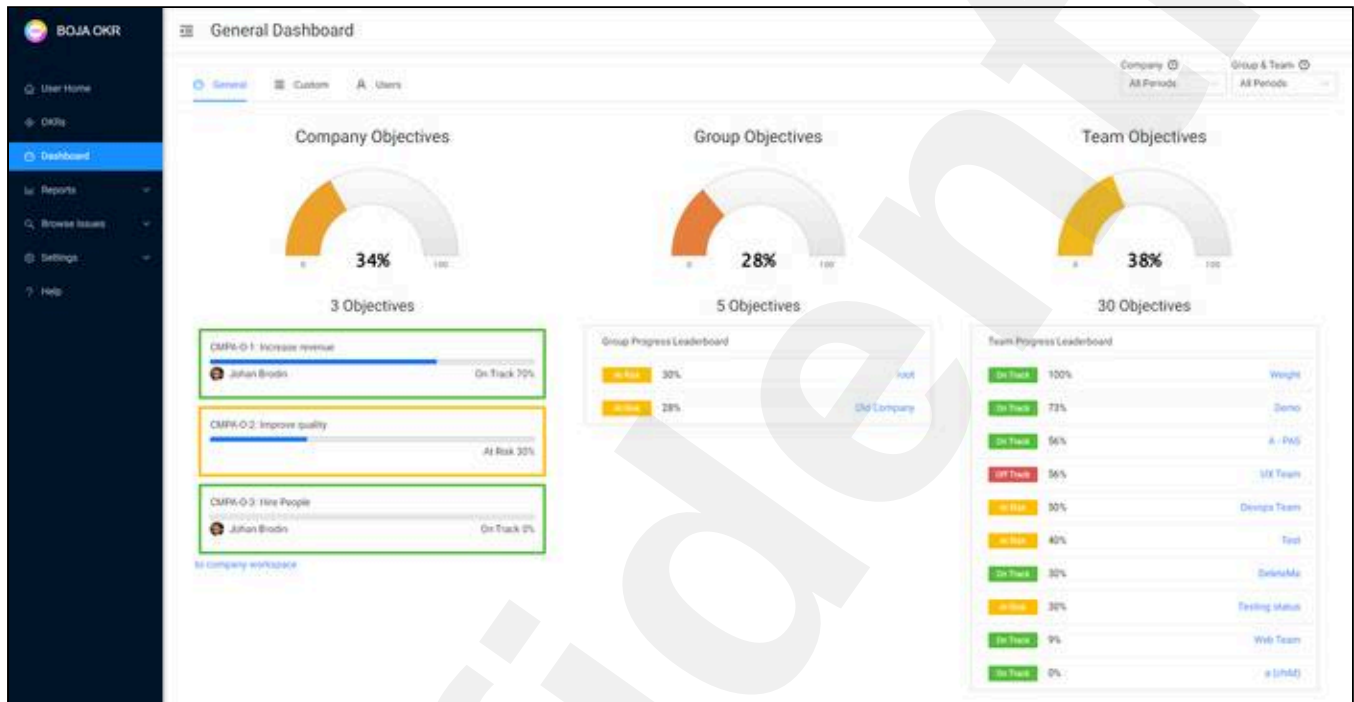


## 6 Dashboard

The dashboard shows the grade and status for all company, group and team workspaces. Top right there are two period pickers. One for the company workspace and one for the groups and teams. Normally company OKRs has a cadence of one year with group and teams quarterly.

Quickly take actions:

- Click on a workspace quick link. Then view and edit ORKs in the OKR table view.
- In dashboard users menu. OKRs are directly shown and editable grouped by assignee and status.



**All Users**

General | Custom | **Users** | All Periods

Search Lead: [ ] | All | Objective | Key Result

| Leads           | Done | On Track | At Risk | Off Track | Avg |
|-----------------|------|----------|---------|-----------|-----|
|                 | 8    | 77       | 9       | 10        | 25% |
| Johan Brodin    | 5    | 28       | 9       | 1         | 43% |
| ordify_bellevue | 3    | 12       | 2       | 9         | 54% |

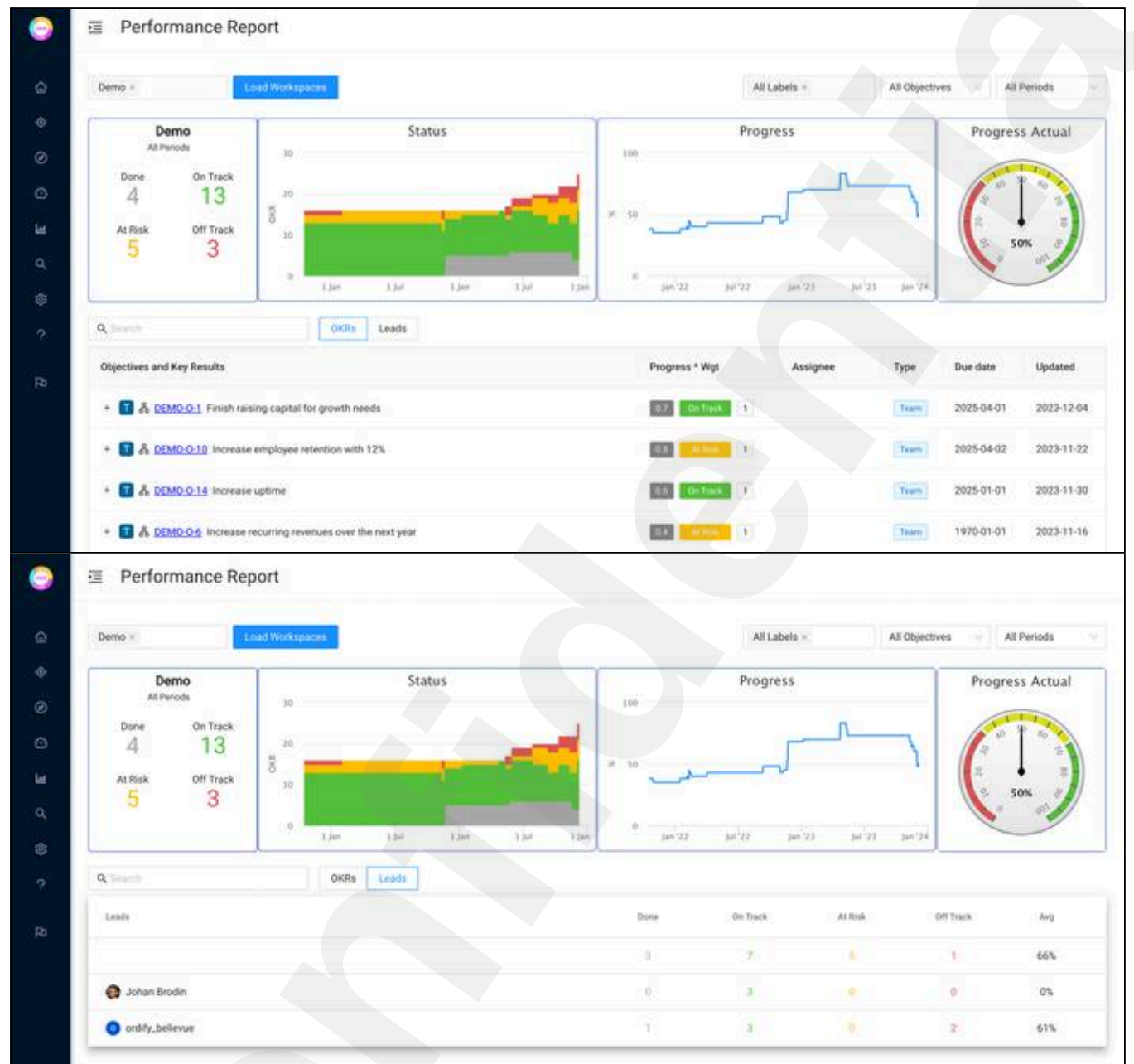
## 7 Reports

In reports the user can select any combination of workspaces, filter on labels, periods and users. It is fully clickable down to individual OKRs supporting editing also in report mode. At the moment two reports are supported.

- Performance Report
- Alignments Report
- User Report

## 7.1 Performance Report

The performance report is build to give you instant visibility on your OKR performance now and over time. You can select any combination of workspaces, users, labels and periods and its clickable down to individual OKRs.

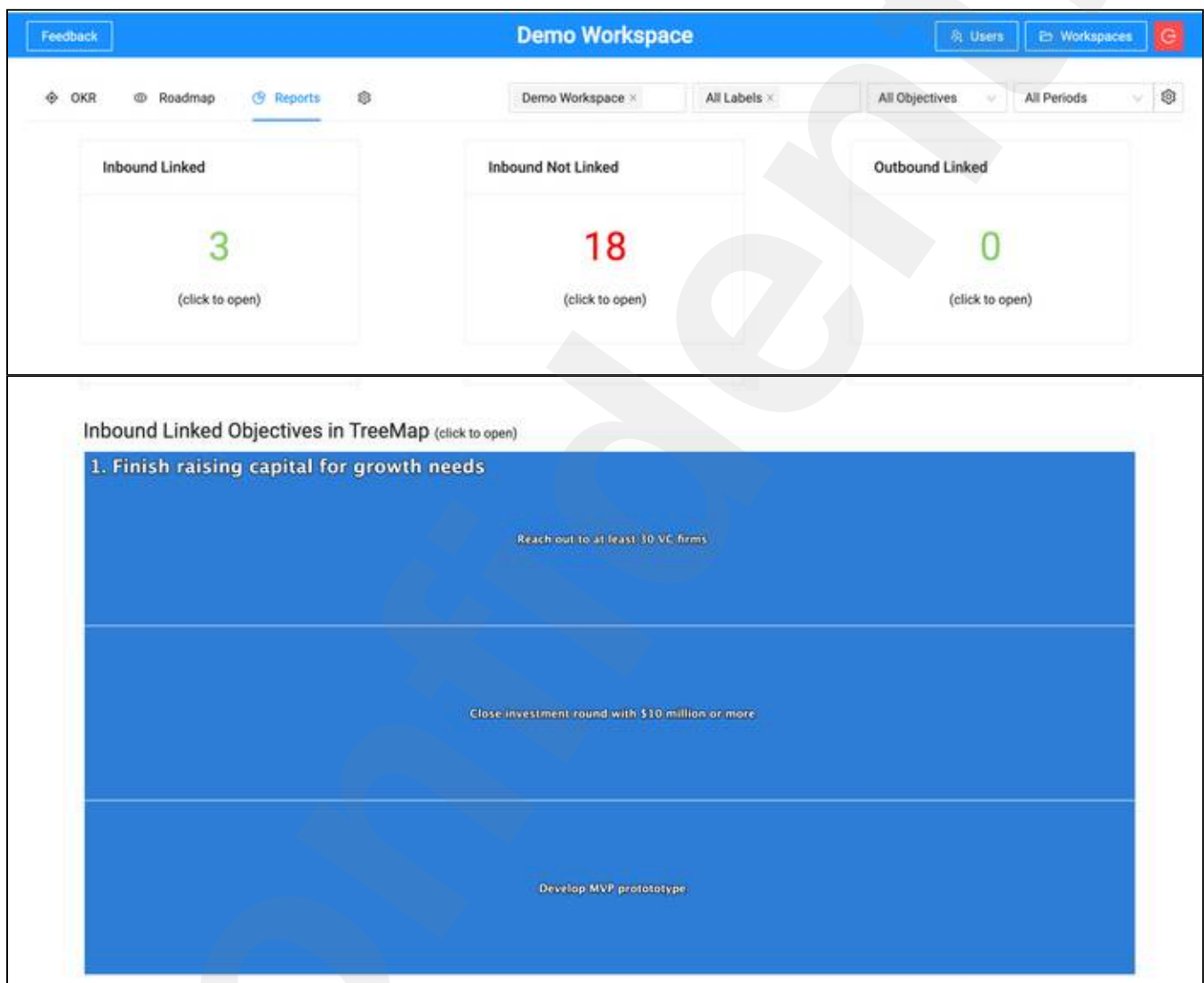


## 7.2 Alignment Report

The alignments report enable you to easily keep track on how many of the selected workspace OKRs have been aligned by other workspaces. Looking at the Company OKRs it then easy to see which of the Objective and Key Result other teams have picked up and are working on.

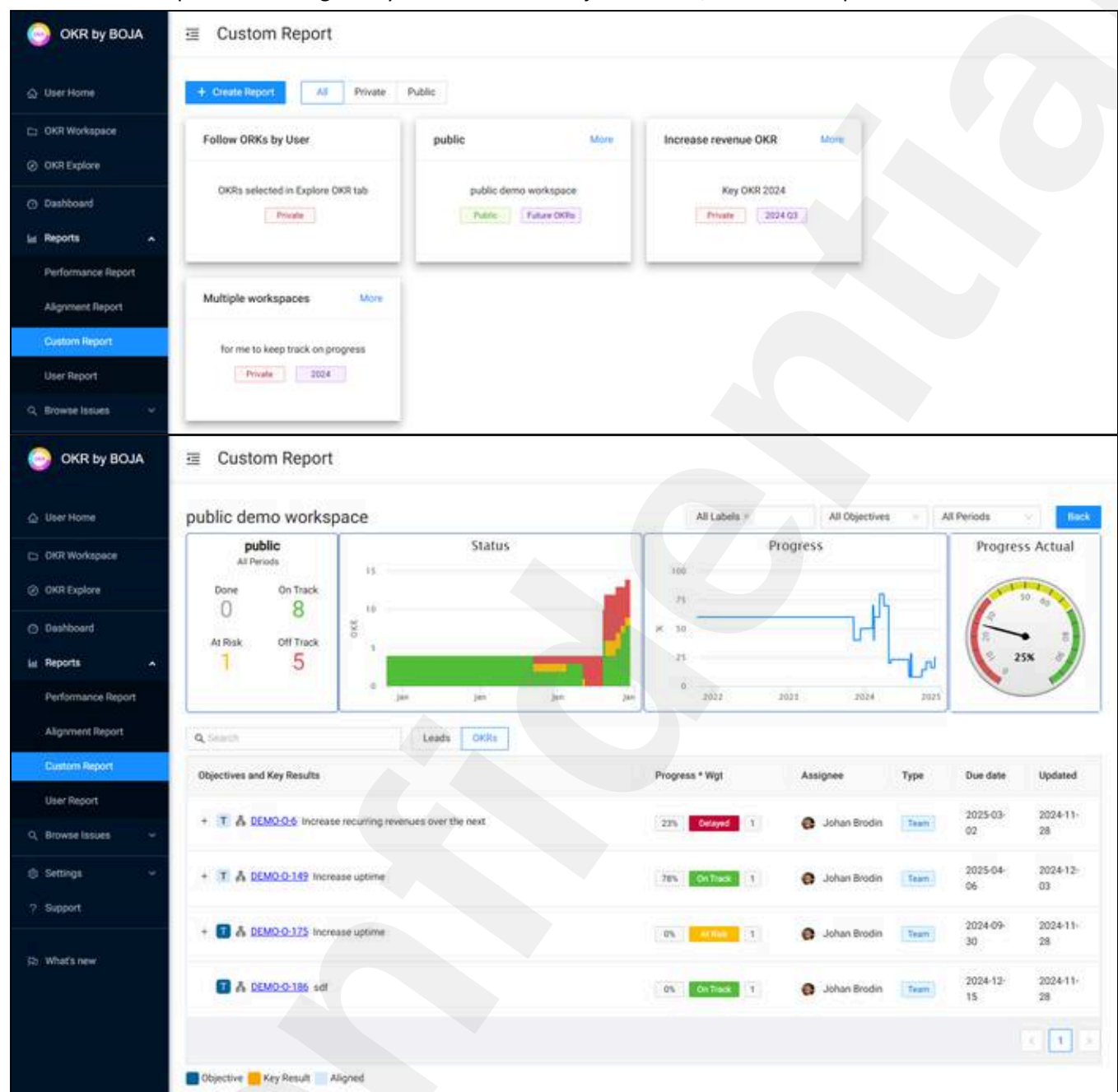
The below report shows that out of 21 OKRs in the demo workspace only 3 have been aligned to (inbound link)by other teams or persons (workspaces).

The Treeview in the same report also shows that the linking has been done to 3 key results and all of them is having the objective “Finish raising capital for growth needs”



## 7.3 Custom Report

Create custom reports consisting of any combination of Objectives and/or OKR workspaces.



## 7.4 User Report

Select users and get a user report with all OKRs assigned. OKRs are editable from within the report.



## 8 Confluence

OKR by BOJA supports both Jira and Confluence within a single app, all powered by the same shared data. Anything you can do in Jira, you can also do seamlessly in Confluence.

1. Connect Jira App to Confluence
2. Add to Confluence Pages
3. Examples

### 8.1 1. Connect Jira App to Confluence

At app installation connect the app to both Jira and Confluence. This can also be done after installation according to below.

The image shows two screenshots of the OKR by BOJA application. The top screenshot is from the Jira interface, showing the 'OKR Workspace - Demo Workspace' with a sidebar menu where 'Manage apps' is highlighted. The bottom screenshot is from the Confluence interface, showing the app's configuration page. In this page, the 'CONNECTED TO' section is highlighted with a red box, showing that both 'Jira Apps' and 'Confluence' are connected. The 'Jira Apps' connection is marked as 'REQUIRED'.

**Connected apps**

**OKR and Goals for Jira & Confluence**  
by BOJA Technology  
RUNS ON ATlassian

**Details** | Connections | Authorization

**DESCRIPTION**  
A complete OKR solution that runs natively on Atlassian. Create clear goals, align teams, turn strategy into measurable results

**CONNECTED TO**

- Jira Apps **REQUIRED**
- Confluence

[Manage connections](#)

**CURRENT EDITION**

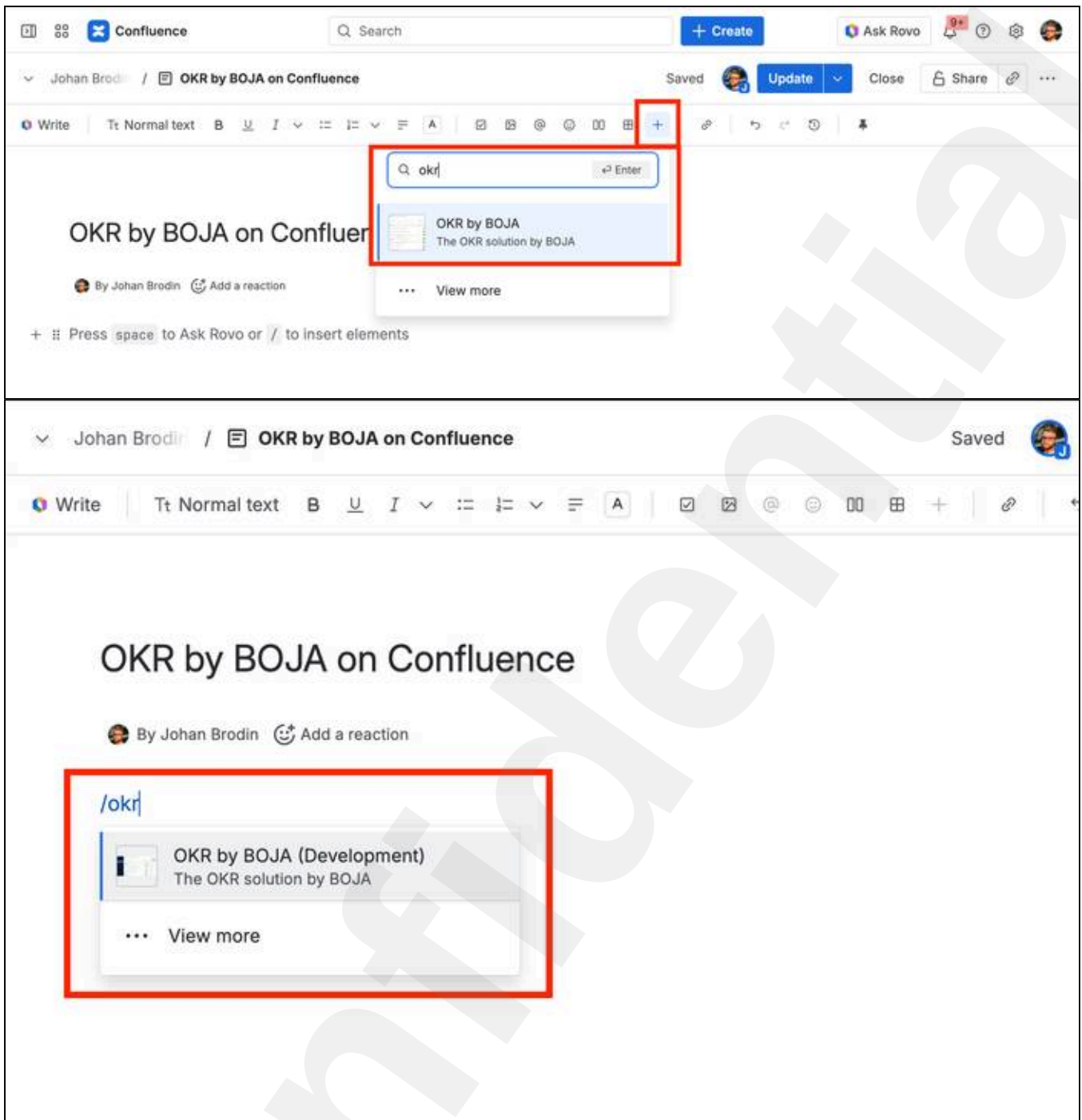
**RELATED LINKS**

- [Marketplace Listing](#)
- [EULA](#)
- [Data Security & Privacy](#)
- [Support & Issues](#)
- [Write a Review](#)

**VENDOR DETAILS**  
Vendor  
BOJA Technology

### 8.2 2. Add to Confluence Pages

Easily add OKRs with BOJA using the OKR macro. It's fully editable in Confluence, and the data seamlessly syncs with the Jira app.



### 8.3 3. Examples

Johan Brodin / OKR by BOJA on Confluence

Updated just now

Edit

Share

...

OKR Workspace - Demo Workspace

OKR Workspaces Manager

Table

Map

Roadmap

Chart

Search

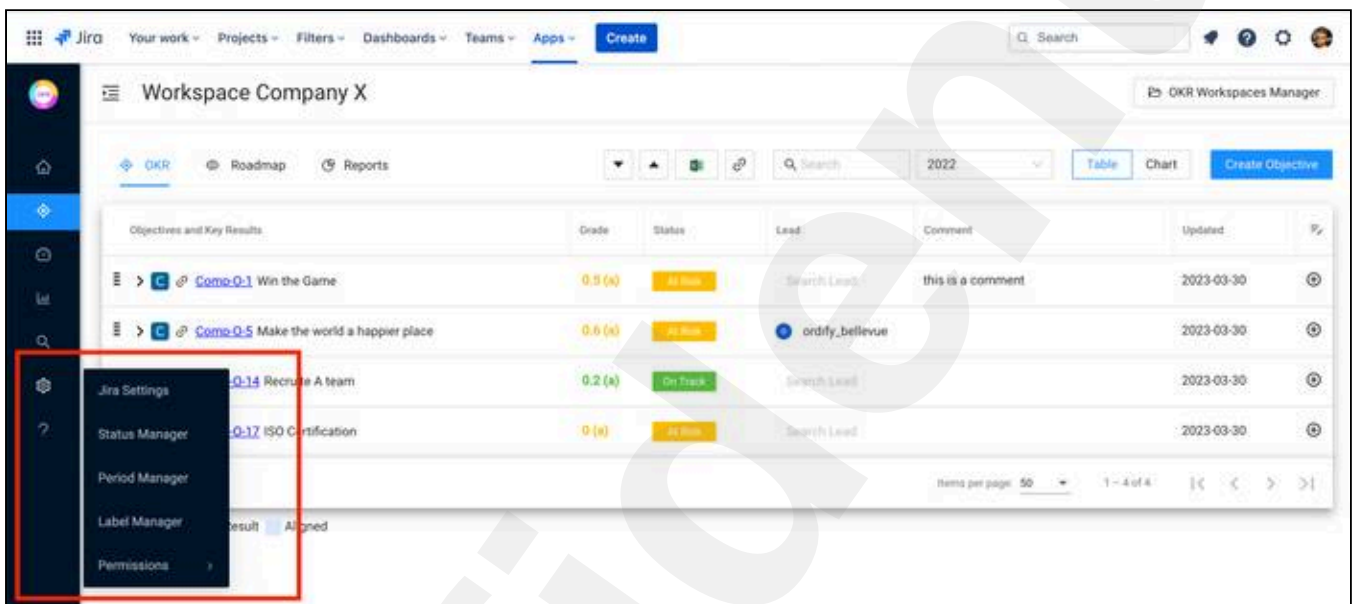
All Periods

Create Objective

| Objectives and Key Results |           |                                                               |      |     | Grade * Wgt | Status * Wgt | Wgt          | Lead       | Updated |
|----------------------------|-----------|---------------------------------------------------------------|------|-----|-------------|--------------|--------------|------------|---------|
| 1                          | DEMO-O-1  | Finish raising capital for growth needs                       | 30%  | (A) | Off Track   | 1            | Johan Brodin | 2026-02-12 |         |
| 10                         | DEMO-KR-2 | Reach out to at least 30 VC firms                             | 60%  |     | On Track    | 1            | Search Lead  | 2026-02-12 |         |
| 10                         | DEMO-KR-3 | Set meetings with at least 10 VC firms                        | 40%  |     | Off Track   | 1            | Search Lead  | 2026-02-12 |         |
| 10                         | DEMO-KR-4 | Secure at least 5 term sheets with our minimum required terms | 20%  |     | Off Track   | 1            | Search Lead  | 2026-02-12 |         |
| 10                         | DEMO-KR-5 | Close investment round with \$10 million or more              | 10%  |     | Off Track   | 1            | Search Lead  | 2026-02-12 |         |
| 1                          | DEMO-O-6  | Increase recurring revenues over the next year                | 63%  | (A) | On Track    | 1            | Johan Brodin | 2026-02-12 |         |
| 1                          | DEMO-O-10 | Increase retention rates                                      | 100% | (A) | Done        | 1            | Search Lead  | 2026-02-12 |         |
| 1                          | DEMO-O-14 | Increase uptime                                               | 16%  | (A) | Off Track   | 1            | Search Lead  | 2026-02-12 |         |

## 9 Settings & Permissions

- Settings Manager
  - Jira Settings
  - Progress Settings
- Notification Manager
- Status Manager
- Period Manager
- Label Manager
- Custom Field Manager
- Permissions



## 9.1 Settings Manager

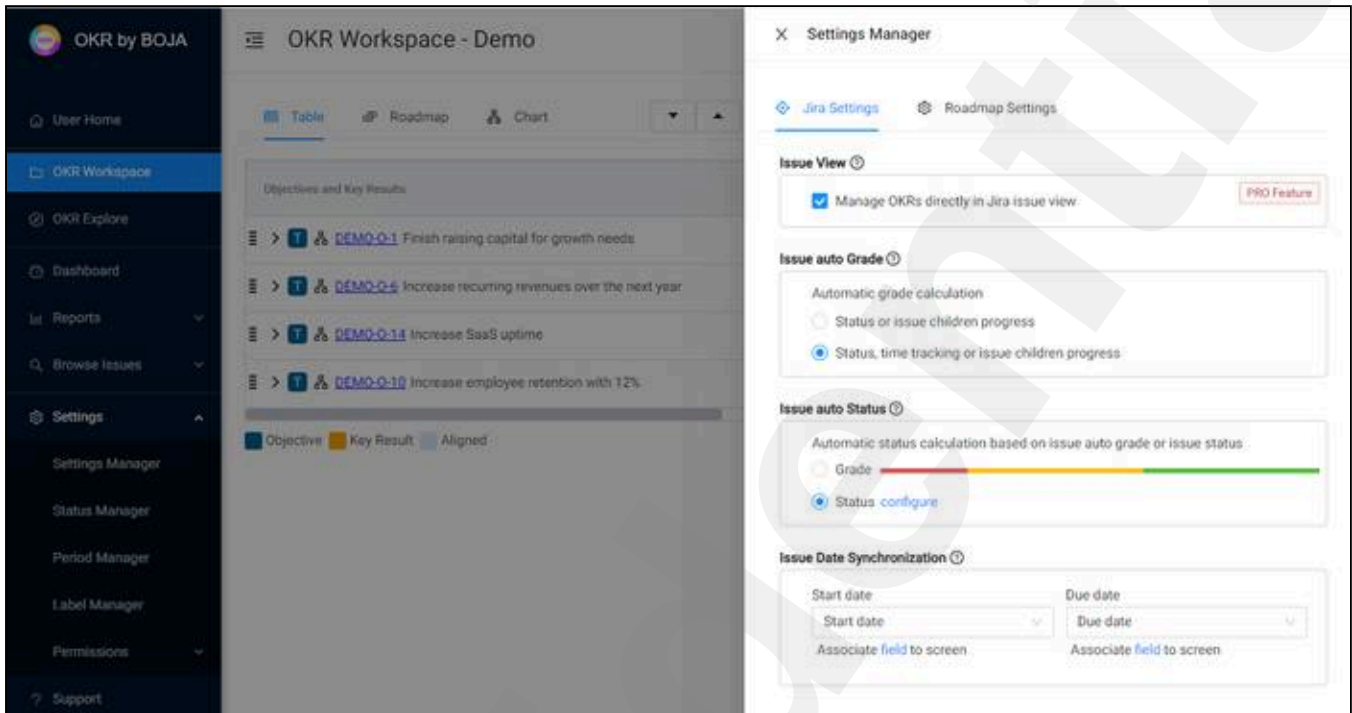
Configure how Jira is integrated into OKR by BOJA as well as general progress settings.

- Jira Settings
- Progress Settings

## 9.1.1 Jira Settings

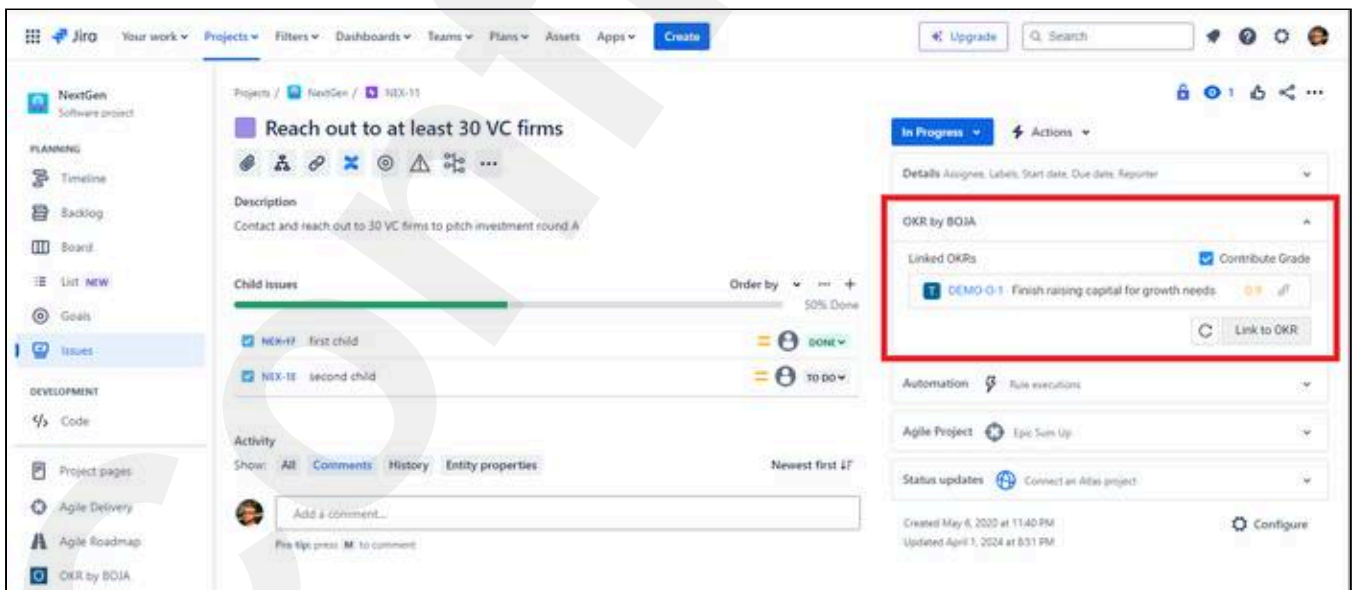
OKR by BOJA comes with a rich set of Jira configuration.

- Issue View
- Issue auto Grade
- Issue auto Status
- Issue Date Synchronization



### 9.1.1.1 Issue View

Manage OKRs directly from the Jira issue view



### 9.1.1.2 Issue auto Grade

Linked Jira issues can be set to auto or manual grading. In manual mode the user grades progress manually between 0-1. In auto mode grading is done based on issue status, child progress and time tracking.

**Issue auto Grade ?**

Automatic grade calculation

- ☒ Status or issue children progress
- ☐ Status, time tracking or issue children progress

**9.1.1.3 Issue auto Status**

Linked Jira issues can be set to auto or manual status. In manual mode the user sets OKR status manually and in auto mode status is automatically calculated based on issue auto grade or status.

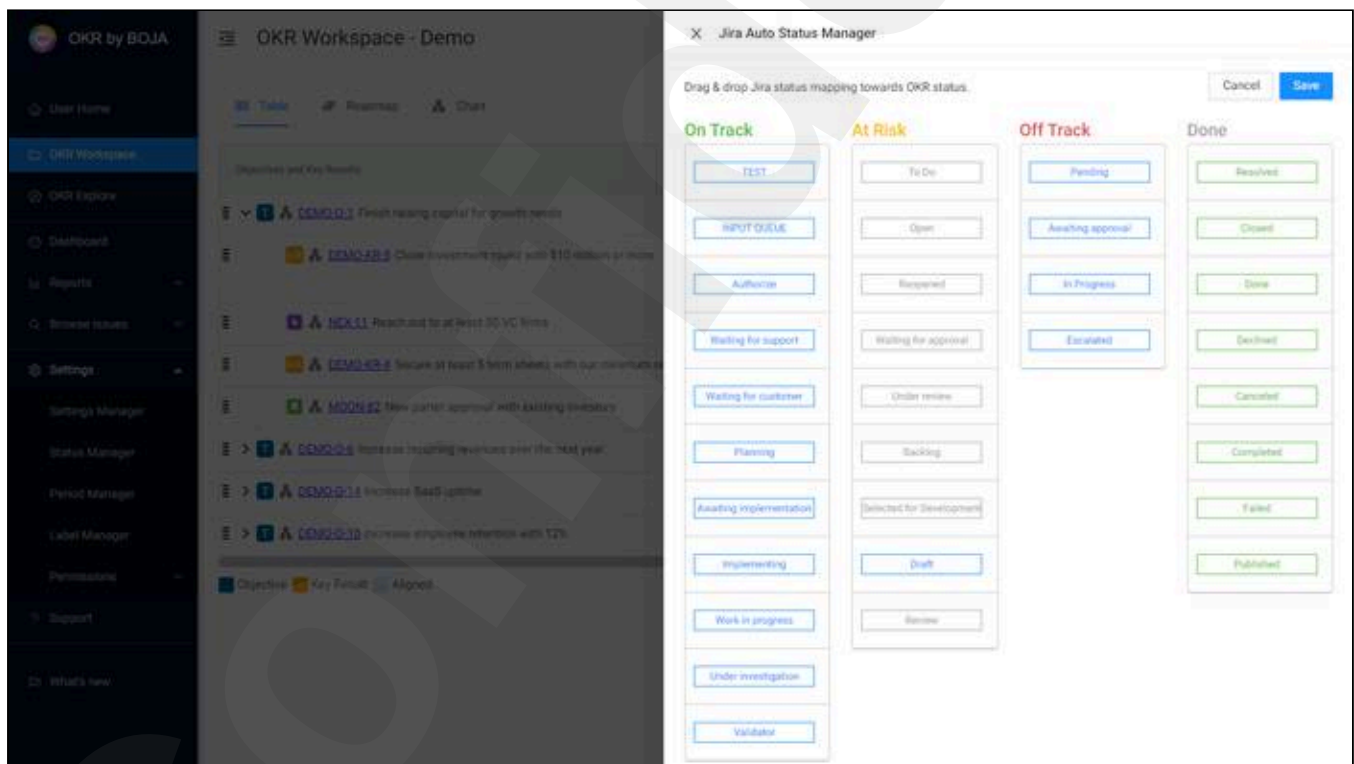
**Issue auto Status ?**

Automatic status calculation based on issue auto grade or issue status

- ☒ Grade 
- ☐ Status [configure](#)

Option 1: Status based on grade: 0-20% off track, 20-60% at risk, 60+ on track

Option 2: Map Jira status to OKR status


**9.1.1.4 Issue Date Synchronization**

Synchronize solution start & due date fields used in e.g. roadmap with Jira date fields

Issue Date Synchronization ?

|                                           |                                           |
|-------------------------------------------|-------------------------------------------|
| Start date                                | Due date                                  |
| <div>Start date</div>                     | <div>Due date</div>                       |
| Associate <a href="#">field</a> to screen | Associate <a href="#">field</a> to screen |

## 9.1.2 Progress Settings

OKR by BOJA can be configured to automatically set status based on grade and progress towards due-date. The recommended way to update due-date is by drag & drop in the roadmap however it can also be updated the due-date field.

### 9.1.2.1 Threshold auto Status

Automatic status updated based on schedule and progress. Configure grade and due-date thresholds and map them to OKR statuses. If thresholds are passed the status is automatically updated for both OKRs as well as linked Jira and monday.com issues. Please note that in this mode status is locked and cannot be updated manually.

The screenshot displays the OKR by BOJA interface. On the left, a sidebar menu lists various settings, with 'Settings Manager' highlighted. The main area shows the 'OKR Workspace - Demo' with a table of objectives. A 'Settings Manager' modal is open on the right, showing 'Progress Settings' selected. The 'OKR Threshold auto Status' section is active, with a checkbox for 'Automatic OKR status based on progress towards due date' checked. Below this, a table defines thresholds for different statuses based on due date and grade.

| Thresholds | Due Date | Grade   | Status    |
|------------|----------|---------|-----------|
| On track   |          |         | On Track  |
| At risk    | > 60%    | & < 0.4 | At Risk   |
| Off track  | > 80%    | & < 0.6 | Off Track |
| Delayed    | > 100%   | & < 1   | Delayed   |
| Done       |          | >= 1    | Done      |

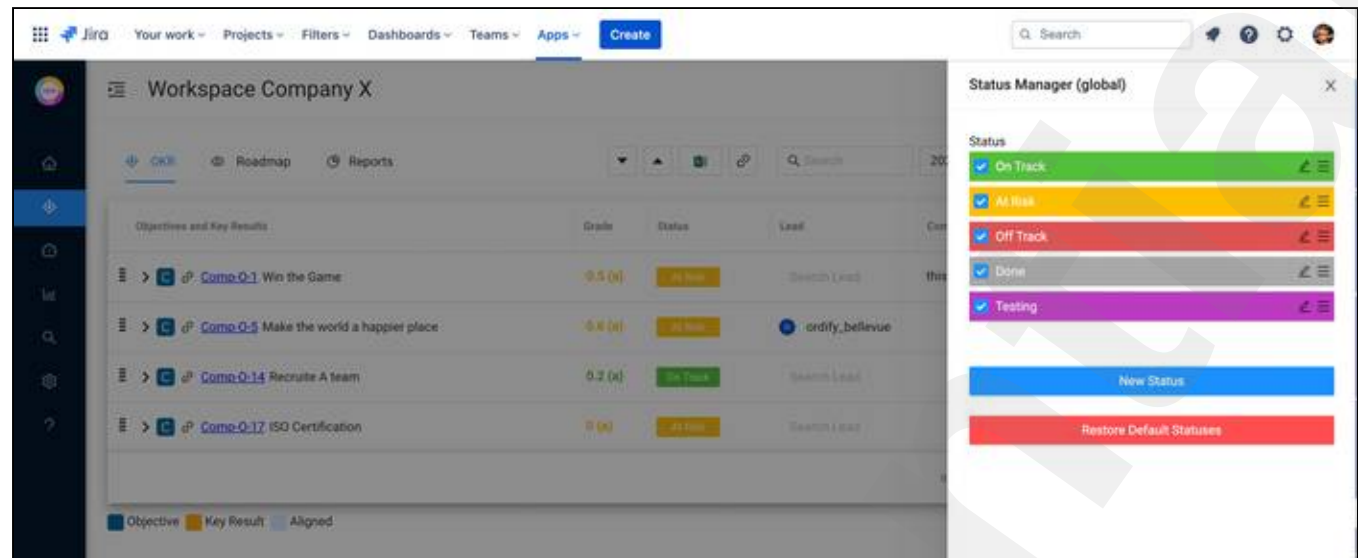
## 9.2 Notification Manager

Users can individually configure email notifications on OKR activity. Notifications are only in the Jira edition.

The screenshot displays the OKR by BOJA interface. On the left, a sidebar menu lists various settings, with 'Personal Manager' highlighted by a red rectangle. The main area shows the 'OKR Workspace - Demo' with a list of objectives and key results. Overlaid on the right is a 'Personal Manager' dialog box with a 'Notifications' tab. Under the 'Email Update on OKR Activity' section, the email address 'johan.b.brodin@gmail.com' is listed. Three notification options are shown: 'OKR assigned to you is updated' (unchecked), 'OKR that you follow is updated' (unchecked), and 'You are @mentioned in a comment, replay or description' (checked).

### 9.3 Status Manager

Create, delete and edit OKR statuses and use within all workspaces.



## 9.4 Period Manager

Periods are created and managed in the settings “Period Manager”. All OKRs belong to one period and the recommended way of working is to have quarterly periods with company OKRs having yearly. The solution also provides two (2) static periods “All periods” and “Future OKRs” available in period pickers.

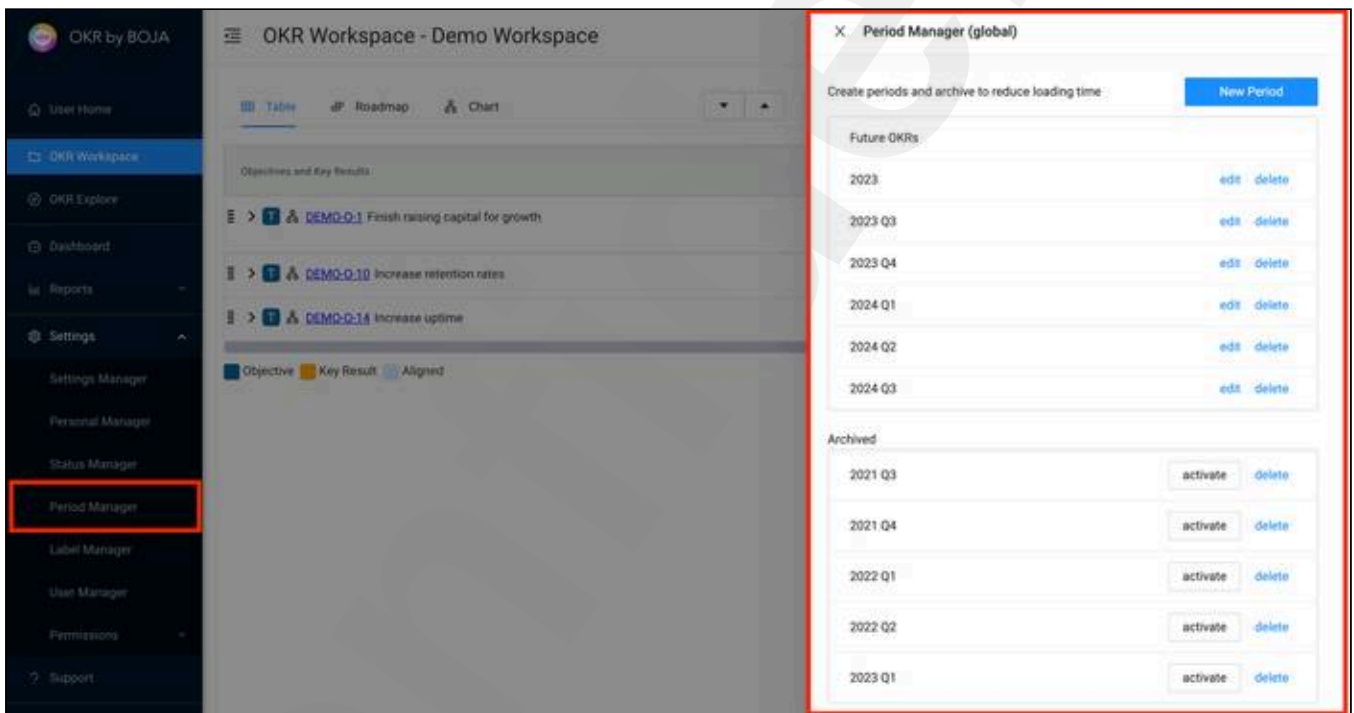
### Archive periods to improve performance

When loading a workspace, all OKRs with active period are loaded. If there are linked active OKRs those remote workspaces are also loaded. OKRs with archived periods are not loaded.

To improve load speed and overall solution performance we recommend to archive old periods.

### Active periods are global and can be used throughout the solution.

### Access to the period manager can be configured in the permission manager.



The screenshot displays the OKR by BOJA application interface. On the left, a sidebar menu lists various settings, with 'Period Manager' highlighted in a red box. The main content area shows the 'OKR Workspace - Demo Workspace' with a table of objectives and key results. A modal window titled 'Period Manager (global)' is open on the right, showing a list of periods categorized into 'Future OKRs' and 'Archived'. The 'Future OKRs' section includes periods from 2023 to 2024 Q3, while the 'Archived' section includes periods from 2021 Q3 to 2023 Q1. Each period entry has 'edit' and 'delete' buttons. The 'Archived' section also includes an 'activate' button for each period.

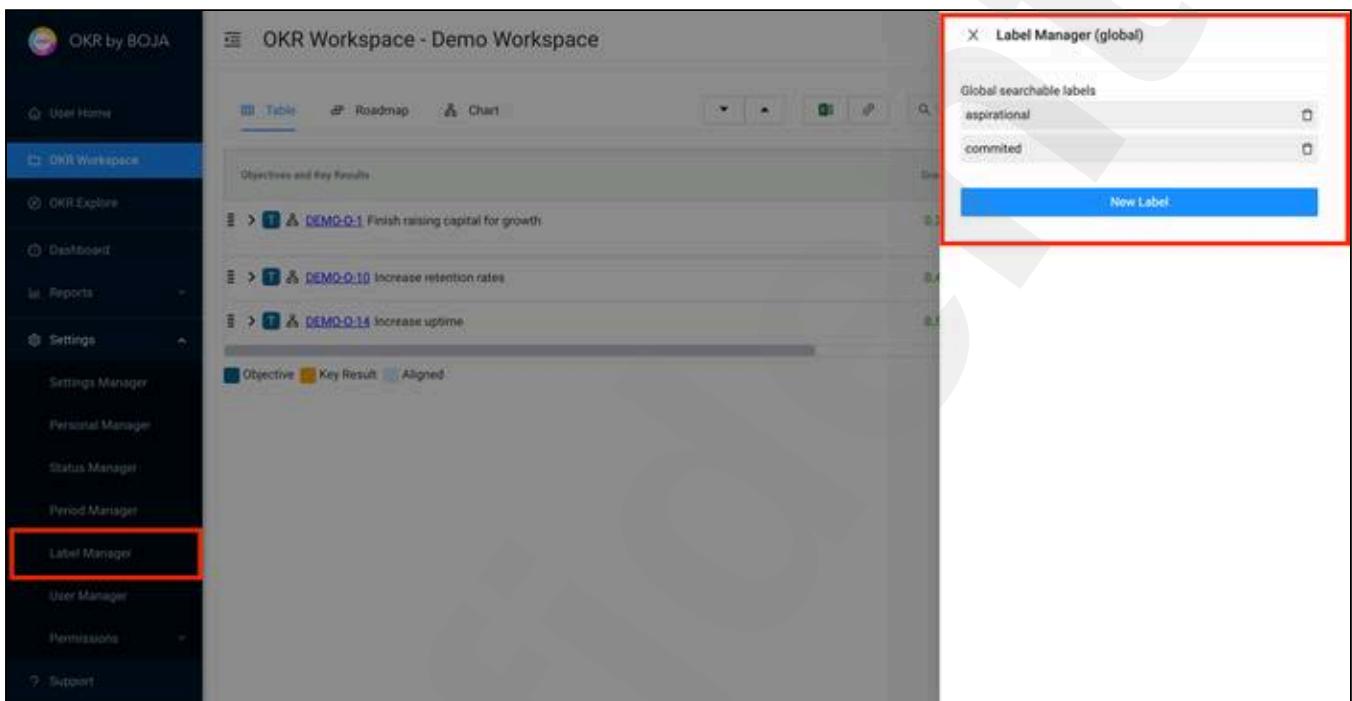
| Category    | Period  | Actions         |
|-------------|---------|-----------------|
| Future OKRs | 2023    | edit delete     |
|             | 2023 Q3 | edit delete     |
|             | 2023 Q4 | edit delete     |
|             | 2024 Q1 | edit delete     |
|             | 2024 Q2 | edit delete     |
|             | 2024 Q3 | edit delete     |
| Archived    | 2021 Q3 | activate delete |
|             | 2021 Q4 | activate delete |
|             | 2022 Q1 | activate delete |
|             | 2022 Q2 | activate delete |
|             | 2023 Q1 | activate delete |

## 9.5 Label Manager

Create labels then assign them to OKRs. Labels can be viewed as tags and are created and managed in the “Labels Manager”. Typical types of labels are OKR commitment levels e.g. Committed or Aspirational. Labels are used throughout the solution to drive visibility and focus e.g. as filter in reports.

**i** Labels are global and can be used throughout the solution.

**i** Access to the period manager can be configured in the permission manager.

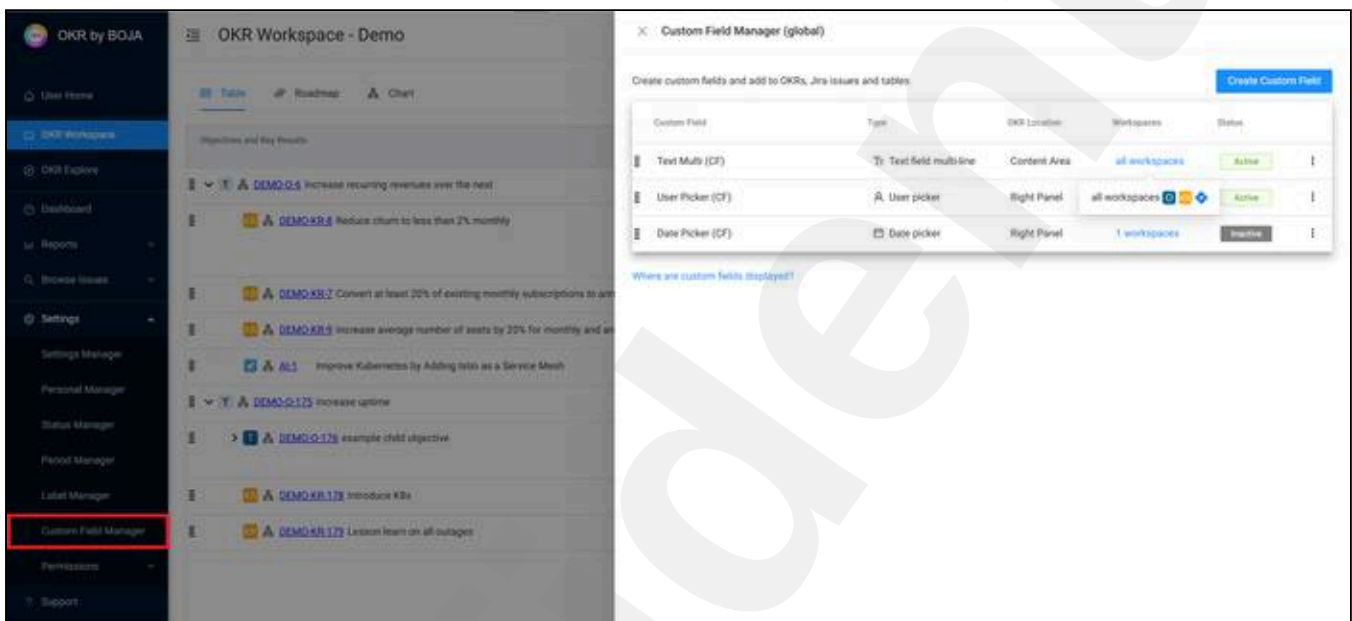


## 9.6 Custom Field Manager

Create custom fields and add to OKR, Jira issues and monday.com tasks. This is a powerful feature enabling companies to add editable company data fields into the OKR by BOJA solution (more info).

Current custom fields types (on request we are happy to add more)

- Text multi-line
- User picker
- Date picker
- Rick text (HTML) - planned
- Jira custom field - planned



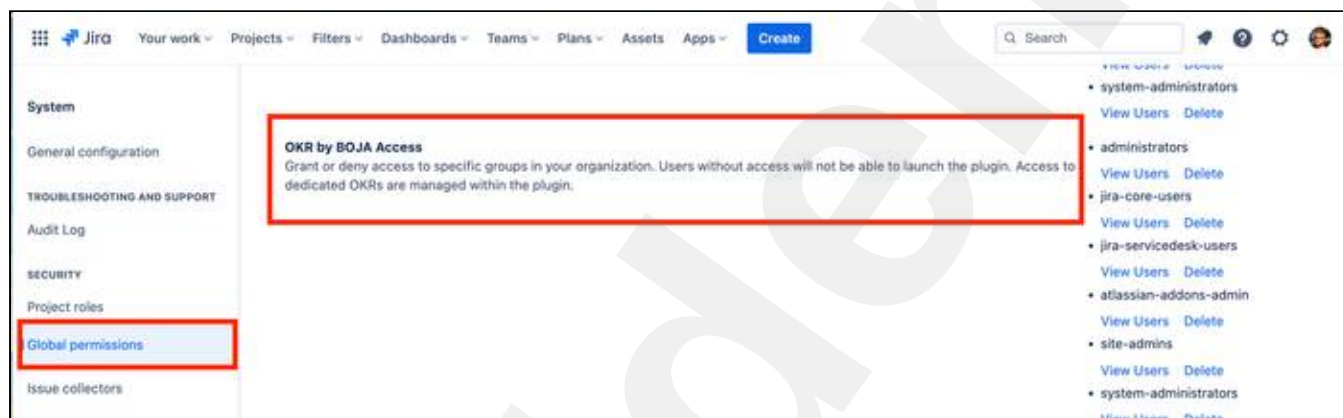
## 9.7 Permissions

Align OKR has a rich set of permissions controlling both user, workspace and OKRs rights.

- User Access
- User Admin
- Permission Manager
- OKR Workspace Permission Scheme
- Permission Limitations (readme)

### 9.7.1 User Access

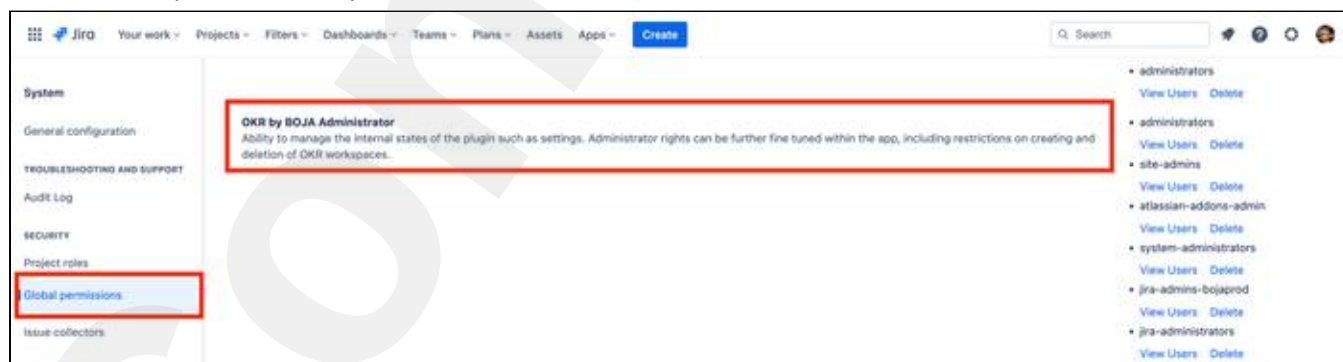
- Jira edition - Users with Jira Global Permission “OKR by BOJA Access” can launch the add-on.
- Web edition - All users invited
- monday.com - All users except viewers



### 9.7.2 User Admin

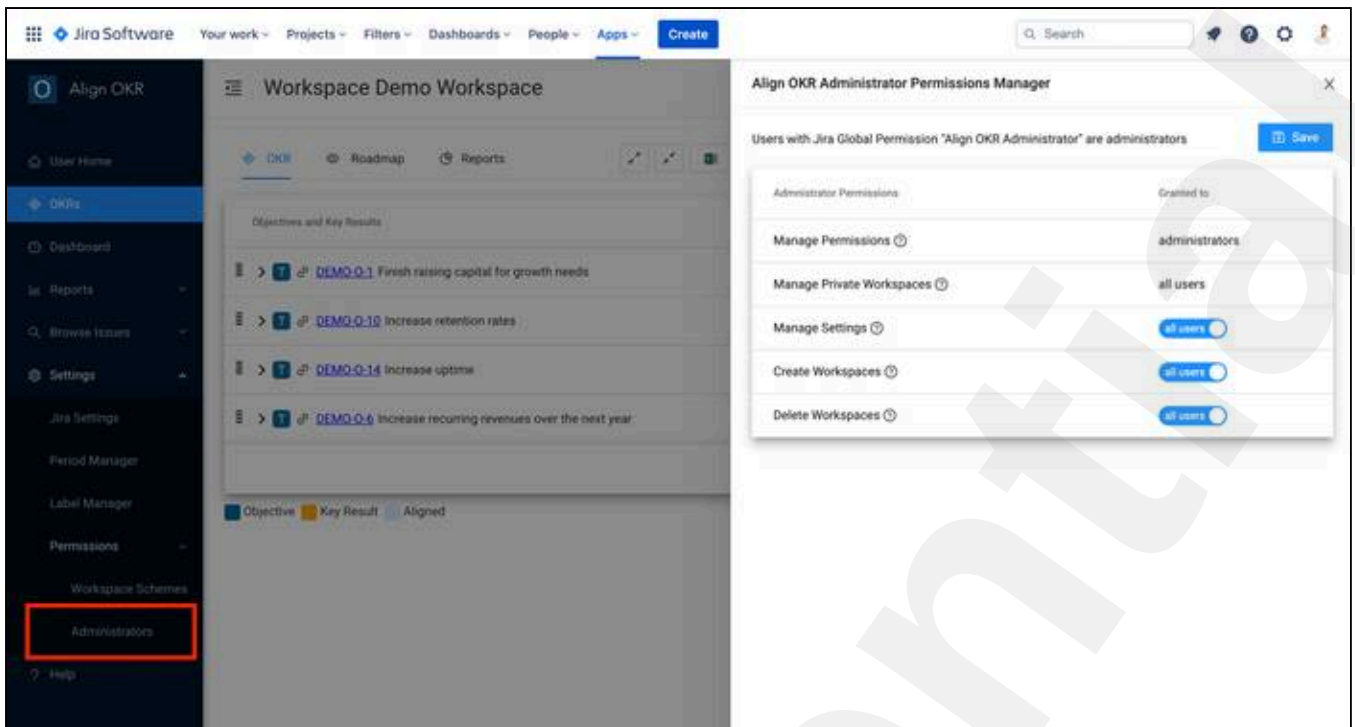
Admin users differs between the web and Jira edition.

- Jira edition - Users with Jira global permission “OKR by BOJA Administrator” (limitations)
- Web edition - All users with the role admin
- monday.com - monday.com admins



### 9.7.3 Permission Manager

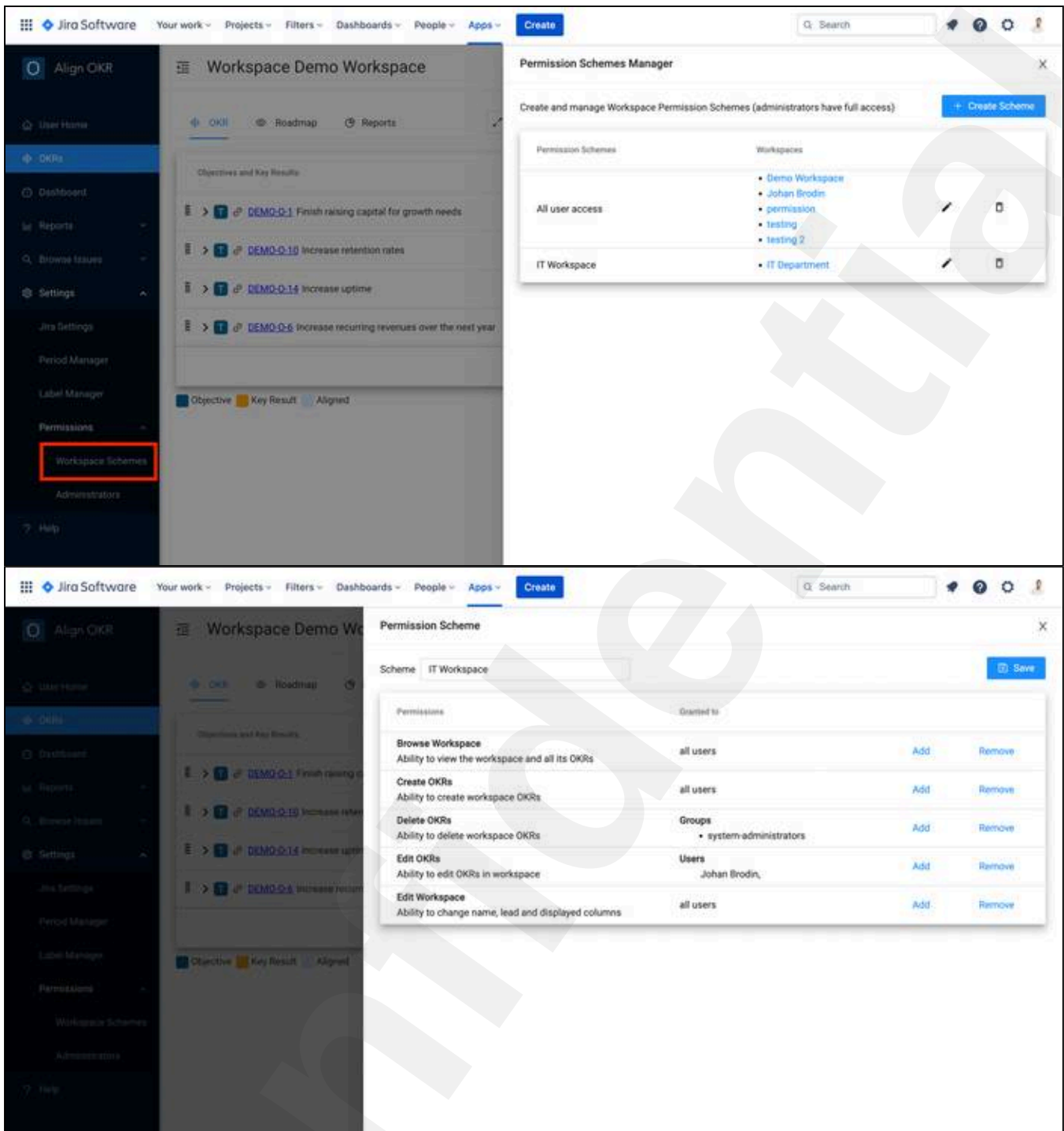
Restrict or grant actions such as “delete workspace” to admins or all users.



#### 9.7.4 OKR Workspace Permission Scheme

Create workspace permission schemes and assign too workspaces. Schemes enable full control over who can view and edit workspaces as well as view, edit and delete permissions to individual OKRs. The “all user access” scheme is the default scheme creating workspaces.

Private workspaces can only be accessed by the creator and persons invited by the creator. Admins can manage private workspaces such as delete however not view the data.



### 9.7.5 Permission Limitations

BOJA OKR permissions limit user access to app functionality through the BOJA OKR user interface. Permissions are not checked at the database level so Atlassian logged-in users with access to the Jira instance might through “hacking” and direct API calls gain access.

Please note that access to Jira and monday.com data is protected by those build in permissions.

## 10 User Management

- Jira User Management
- monday.com User Management
- Web User management

## 10.1 Jira - User Management

By default all Jira users can directly launch the app and start working with OKRs. This means that there is no additional work or configuration to add users to Align OKR.

If users access needs to be restricted please use the Jira global permission “Align OKR Access” as described in the permission section.

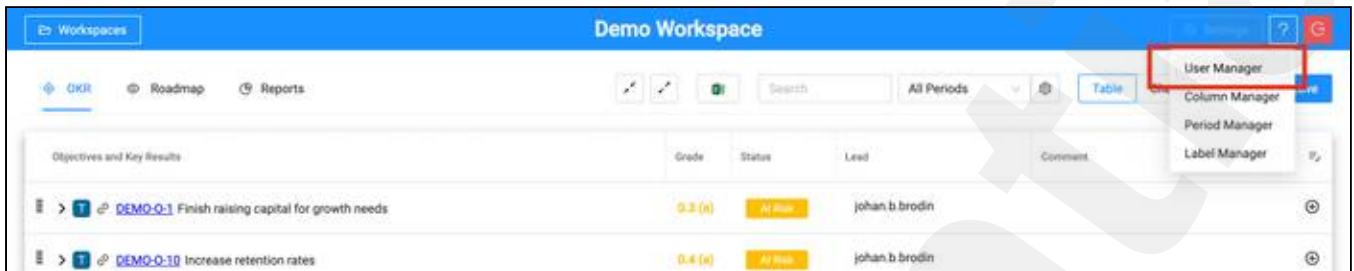
## 10.2 monday.com - User Management

All monday users with the exceptions of viewers and guest can launch the app from the monday board view. Those viewers are also available within the solution assigning owners to OKRs, linked monday.com items and workspaces.

## 10.3 Web - User Management

In settings select “User Manager”. Users can be added, inactivated and modified including permission change.

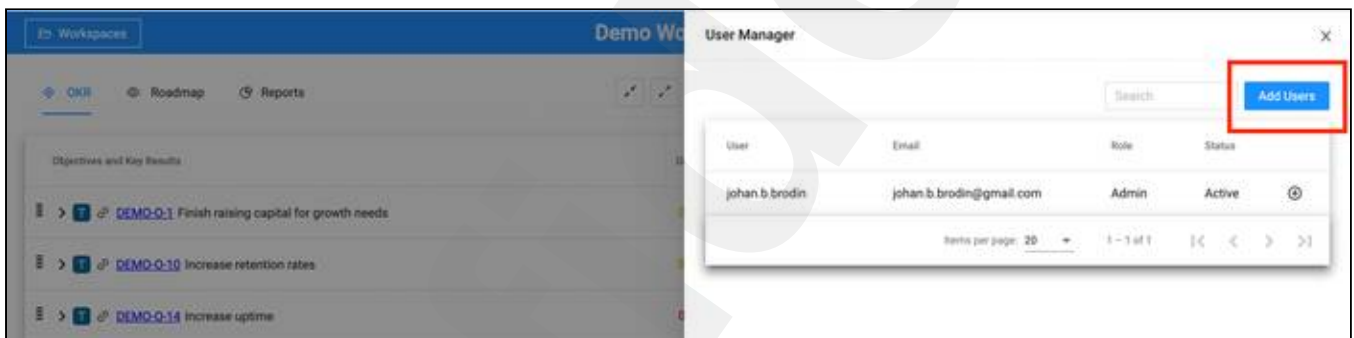
- Add Users
- Remove Users
- User Roles



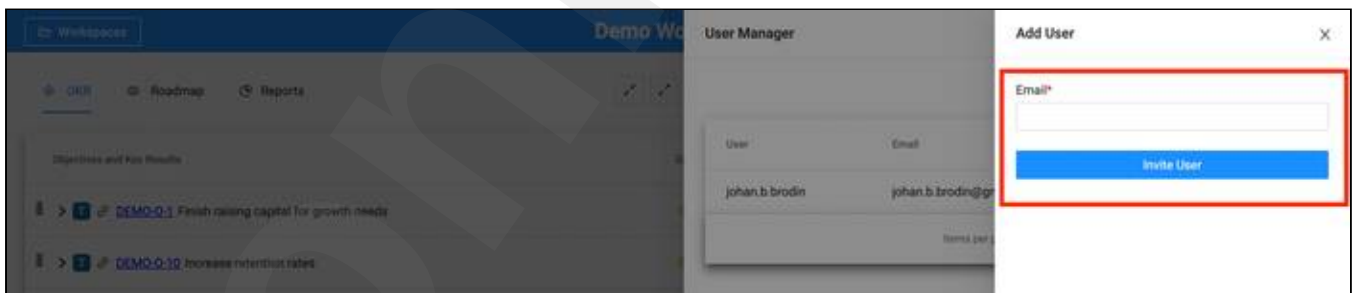
### 10.3.1 Add Users

Press the “Add User” button. Then enter the user email address and press “Invite User”. A welcome email is sent out and the user ready to login at <https://alignokr.web.app/login>. At first time login the user must request a password over email selecting the “Invited User” tab.

*(The welcome email might be blocked by spam filters however its informative so not needed for login)*



Enter the email address and press “Invite User”

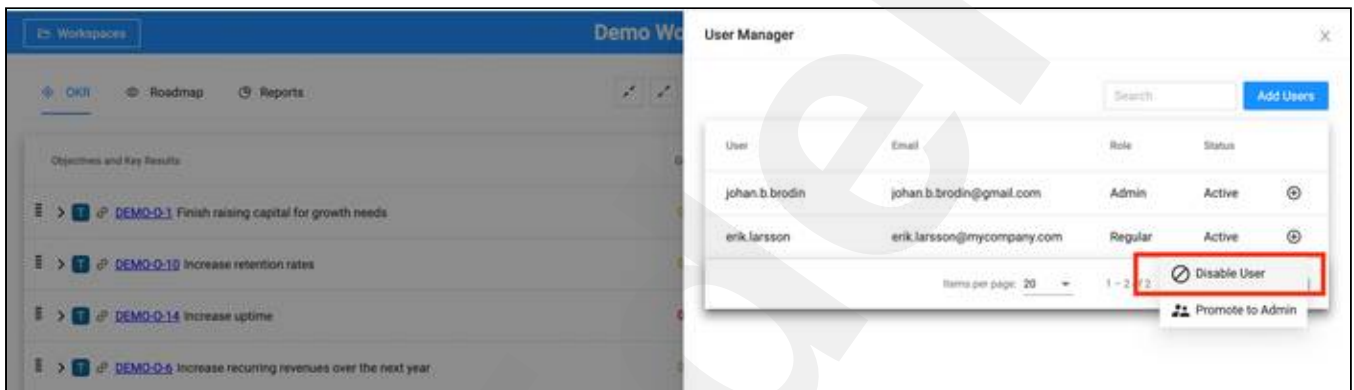


At first login request email password reset under “Invited User”



### 10.3.2 Remove Users

Press the plus button for the user that shall be removed. Select “Disable User” and the user is not able to login. The user can be enabled at a later point in time.



### 10.3.3 User Roles

There are four different user roles. Different roles can be assigned to different permissions in the workspace permission scheme. Admin users are also allowed to enable the “Admin permission” restricting or granting actions such as “Delete a Workspace”.

- Regular
- Lead
- Viewer
- Admin
-

# 11 Security and Privacy

Boja OKR are part of the Atlassian “Cloud Security Participant” program. This means that independent security researchers are invited to find security weaknesses with SLA too correct issues found.

## Security and Privacy Policy

- Atlassian Marketplace Security & Privacy
- Boja OKR Security
- Boja OKR Privacy Policy

## 12 Miscellaneous

- OKR by BOJA Jira Pro Version

## 12.1 OKR by BOJA Jira Pro Version

OKR by BOJA Jira Pro version enables below features

| Feature                                         | Explanation                                                        |
|-------------------------------------------------|--------------------------------------------------------------------|
| Grade OKR progress in Percent Binary and Number | Set individual OKR grading in both manual and automatic mode       |
| Restore deleted OKRs from Bin                   | Restore deleted OKRs from bin (info)                               |
| Jira issue view OKR widget                      | Manage OKRs directly from Jira issue view (info)                   |
| Jira issues as objective                        | Work entirely with Jira issues as both Objective and Key Results   |
| Email notifications                             | Email notification on OKR activity (info)                          |
| Private workspaces                              | Work in private workspaces and invite collaborators (info)         |
| Custom reports                                  | Create custom reports base on individual OKRs or Workspaces (info) |
| Custom fields                                   | Add custom fields OKR (info)                                       |
| OKR Explore                                     | View and edit all OKRs in one place (info)                         |