



MANUAL

LEADERSHIP MANAGEMENT

VERSION 1.01

Model established management
methods like MBO or OKR in
Microsoft Dynamics 365 Business
Central.

FAIRNETY

Content

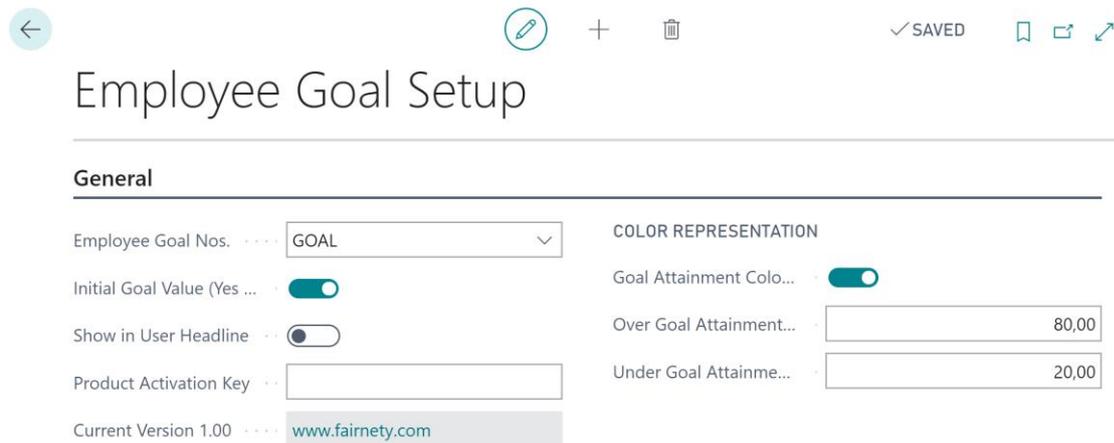
1. Setup.....	2
1.1 Employee Goal Setup	2
1.2 User Setup	3
1.3 Permission Sets	3
2. Goal Template	4
2.1 Header Information.....	4
2.2 Line Information.....	5
2.2.1 Weighting Calculation Example.....	7
2.3 Deviations.....	8
2.4 Functionalities / Use Cases.....	8
2.4.1 Copy Goal Templates.....	8
2.4.2 Copy to Employee / Team	8
2.4.3 Close Employee Goals	9
2.4.4 Reopen Employee Goals.....	9
2.4.5 Delete Employee Goals	9
3. Employee Goals.....	10
3.1. Header Information.....	10
3.2. Line Information	11
3.3 Attainment on Goals	11
3.4 Role Center.....	12
4. Team Goals.....	13
5. Scoring System	15
5.1. Special Case "Goal Attainment is linear".....	15
6. Notifications	16
7. OKR Scenario	17
8. Analysis Report.....	20

1. Setup

1.1 Employee Goal Setup

Before you start you have to fill out the Employee Goal Setup.

Choose the  icon, enter **Employee Goal Setup**, and then choose the related link.



Explanation of the fields:

Field	Meaning
Employee Goal Nos.	Enter here the number series that should be used for the employee goals
Initial Value Goal (Boolean)	Defines the initial value of a Goal line of the data type "Yes / No". A tick in this field always sets the Goal value of this Goal line to "Yes".
Show in User Headline	Show headline information in the role center
Product Activation Key	Key to activate the module. This key is only necessary if you don't want to use the In-App Purchase with credit card. You have to fill out the contact form at www.fairnety.com to request the Activation Key. After installing the App, a 10 Days Trial version started automatically.
Current Version No.	Show the current version no. and the link to the fairnety website.
Goal Attainment Colors Active	Controls whether the color visualization of Goal lines, depending on the field "Goal Attainment in%", is activated.
Over Goal Attainment % (Favorable)	If the "goal attainment %" \geq the entered value, the line "green" is displayed.
Under Goal Attainment % (Attention)	If the "goal attainment %" $<$ the entered value is reached, the line "red" is displayed.

Show in User Headline	The individual user receives various information about his agreed goals in the headline part on the role center. For Example: Goals to fill out, Goals this month and Overdue Goals
-----------------------	---

1.2 User Setup

The following fields have been added to the standard Page "User Setup":
 Choose the  icon, enter **User Setup**, and then choose the related link.

Field	Meaning
Goal Administrator	Sets the administrator for employee goals. Only the administrator can change the status or the goal type in the Employee Goal Header.
Employee No.	Link the logged in user with the associated employee. This is relevant when displaying personal goals, such as the role center tiles. The assignment of the notifications is also based on the employee number instead of.

USER SETUP | WORK DATE: 28.01.2021

 Search  New  Edit List  Delete  Open in Excel						
User ID ↑	Serv... Resp. Ctr. Filter	Time Sheet Ad...	E-Mail	Employee Goal Administrator	Employee No.	
→ MWALTER2020		<input type="checkbox"/>	MWalter@cronus.net	<input type="checkbox"/>	PS	
		<input type="checkbox"/>		<input type="checkbox"/>		

1.3 Permission Sets

Two permission sets are supplied with the app and can be used as standard.

Permission Set	Description
LEADERSHIP MGT ADMIN	Full functionality User can e.g. - do all setups - Create, edit, delete templates - Copy templates to employees - Create, edit, delete employee goals
LEADERSHIP MGT USER	Limited functionality User can - Edit your employee goals

2. Goal Template

Goal Templates are records that can be used repeatedly for any periods and employees as a basis.

Goal Templates can not be renamed. Deletion is only possible through the “goal administrator” [see point 1.2.](#)

Goal Templates consist of a header, any number of lines and the associated deviations. Choose the  icon, enter **Goal Templates**, and then choose the related link.

ENU - SALES 2020

 Levels |
  Actions |
  Navigate |
  Report |
  Fewer options

General

Code ENU - SALES 2020 End Date 31.12.2020 

Description Employee Goals for Sales Consultants in 2020 Number of agreed Goals 0

Start Date 01.01.2020  Number of max. Levels 3

Lines |  Manage

Description	Goal Definition	Weighting Factor	Weighting Percentage	Value Input Data Type	Goal Value Text	Value to set (Em...)	Notification
task-related	task-related	4	80,00			<input type="checkbox"/>	
new customers	Attracting at least 8 new custo...	2	40,00			<input type="checkbox"/>	
→ License sales	Achievement of a total license tu...	1	20,00	Number/Val...	900.000	<input checked="" type="checkbox"/>	Email
existing customers	The product "module" should b...	1	20,00	Number/Val...	12	<input checked="" type="checkbox"/>	
Leads	65 new C-leads are to be gener...	1	20,00	Number/Val...	65	<input checked="" type="checkbox"/>	Note
personal goals	personal goals	1	20,00			<input type="checkbox"/>	
Training / education	Until the end of October the 3-...	1	33,33	Date		<input checked="" type="checkbox"/>	
Review by supervisor	Review by supervisor	1	33,33			<input type="checkbox"/>	
internal communication	Communication with colleague...	1	33,33	Selection		<input type="checkbox"/>	
punctuality	How is the punctuality to appoi...	1	33,33	Selection		<input type="checkbox"/>	
preparedness	Helpfulness and work ethic	1	33,33	Selection		<input type="checkbox"/>	

Deviations |  Manage

2.1 Header Information

Field	Meaning
Code	Define a unique code to identify the Goal Template.
Description	Any free text can be entered here.
Start Date	Enter the start date of the Goal Template. If you want to use this template for different periods of time, leave this field blank.
End Date	Enter the start date of the Goal Template. If you want to use this template for different periods of time, leave this field blank.

Number of agreed Goals	Drill down an overview of all agreed employee goals using this Goal Template.
Number max. Levels	Displays the number of maximum usable hierarchy depths. This can be adjusted via Navigate > Levels.

2.2 Line Information

To create rows, you must define the number of levels for this Goal Template. This is necessary for later evaluations.

In the Header click **Levels** to create new levels.

← GOAL TEMPLATE LEVEL | WORK DATE: 28.01.2021

🔍 Search
+ New
✎ Edit List
🗑 Delete
📄 Open in Excel

	Level ↑		Description
	0		Goal Type
	1		Todo (MBO)
→	2	⋮	Detail (OKR)

In evaluations individual levels can be considered. For example, a standard definition at level 0 would capture the MBO criteria and subordinate to Level 1 the KEY-Results (OKR) subdivision of the goals into smaller time periods / units.

Afterwards, you can generate any number of Goal lines with the function "Create lines". Subordinate rows can only be created if a level exists for them.

Click in Lines Part: Manage > Create Lines

CREATE SUBLEVELS



General

Number of Lines ×

Create as ▾

The number of Lines (Sublevels) is limited by technical restrictions (approx. <50 sublevels).

Create as

New Level: create child rows

Same Level: create Lines on the same level

The line informations can then be maintained:

Field	Meaning
Description	Any free text. Will be printed on Report Goal Agreement
Description 2	Any free text.
Goal Definition	the exact Goal definition. Is printed on report "Goal Agreement"
Weighting Factor	Sets the factor in which this row is used in the overall calculation of the Attainment of the Goal. When you enter, the "Weight Percentage" field is calculated automatically. Allowed values are 0-100.
Weighting Percentage	In this percentage ratio, this line is included in the overall calculation of the Attainment of the goal.
Value Input Data Type	<p>Here it is determined in which form the value input should take place. The data type affects destination and actual values.</p> <p>Yes / No: The value entry is based on a selection between Yes and No. The Default value is taken from the table "Employee Goal Setup". See 1.1. "Employee Goal Setup"</p> <p>Number / value: The value is entered with an arbitrary decimal number. You have to define Deviations if field „Goal Attainment is linear“ = False.</p> <p>Date: The value entry requires a valid date. You have to define Deviations.</p> <p>Selection: The entry is based on an existing selection of stored options. Options are defined using the "Selection" function in the "Deviations" tab.</p> <p>“ “: this is the initial value after creating new lines</p>

Goal Value Text	Here, the desired Goal Value is entered, depending on the data type. The Goal Value is printed in the Goal agreement.
Value to set (Employee)	Set when the employee is to record the Goal progress himself. For example, in its quick capture. If NO, the Goal cannot be entered by the employee because it does not appear in the quick journal. This is used, for example, for assessments of supervisors over which the employee should have no influence.
Email Notification	A tick in this field causes the employee to be informed by Email about this goal line for maintaining the values. See point 6. "Email Notification"
Print	Only lines with "Yes" are printed in the Goal agreement.
Goal Attainment is linear	Only relevant for "Goal Value Data Type" = "number / value". If the field is set to "Yes", no deviation for individual values must be defined. The calculation of the "Goal Attainment in %" proceeds in relation to the Goal Value to the actual value. (Example: "Goal Value" = 200, Actual Value = 180 → automatic calculation of "Goal Attainment in %" = 90%). Values greater 100% are possible.
Goal Category	Used to evaluate the Attainment of goals by category (e.g. Sales).

2.2.1 Weighting Calculation Example

The percentage weighting is calculated as follows:

Example 1:

Line 1 -> Weighting Factor = 1 (Weighting Percentage = 20)

Line 2 -> Weighting Factor = 1 (Weighting Percentage = 20)

Line 3 -> Weighting Factor = 3 (Weighting Percentage = 60)

This means that the Weighting Percentage over all rows within the same level always equals 100% (rounded)

Example 2:

Line 1 -> Weighting Factor = 60 (Weighting Percentage = 50.85)

Line 2 -> Weighting Factor = 5 (Weighting Percentage = 4.24)

Line 3 -> Weighting Factor = 30 (Weighting Percentage = 25.42)

Line 4 -> Weighting Factor = 3 (Weighting Percentage = 2.54)

Line 5 -> Weighting Factor = 20 (Weighting Percentage = 16.95)

2.3 Deviations

In the register “Deviations” the goal values are defined with their associated degree of goal attainment.

Date deviations can be entered as a date formula or a fixed date.

“Goal Attainment in %” can also exceed 100%, for example if a goal has been over-fulfilled. value is the same like the actual value the attainment is 100%. Is the actual value not the target value, the attainment is 0%.

Deviations cannot be defined for Lines with subordinated Lines.

An exception is the data type “yes / no”, where no deviations can be made. If the target

	personal goals	personal goals	1	20,00		
	Training / education	Until the end of October the 3-...	1	33,33	Date	
	Review by supervisor	Review by supervisor	1	33,33		
→	internal communication	Communication with colleagues ;	1	33,33	Selection	
	punctuality	How is the punctuality to appoi...	1	33,33	Selection	
	preparedness	Helpfulness and work ethic	1	33,33	Selection	

Deviations | Manage

Belongs to	Goal Value	Goal Attainment in %	Description
→ internal communication	EXCELLENT	100,00	
internal communication	GOOD	80,00	
internal communication	ACCEPTABLE	40,00	
internal communication	NOT GOOD	0,00	

2.4 Functionalities / Use Cases

The following Actions are available in the Goal Template Card.

Levels	Actions	Navigate	Report	Fewer options
Copy Goal Template...	Copy to Employee / Team...	Close Employee Goals...	Reopen Employee Goals...	Delete Employee Goals...

2.4.1 Copy Goal Templates

Copies an existing Goal Template into a new Template with all the corresponding lines and deviations.

2.4.2 Copy to Employee / Team

Once the Goal Template has been entered, it can be transferred to one or more employees or to a team.

1. Click on Actions > “Copy to Employees / Team”.

2. Select the desired "Default Goal type", the status and, if necessary, the corresponding team (only for goal type "Team").
3. In the Request Page "Employee" you can filter the employees to whom the Goal template is to be copied.

COPY GOAL TEMPLATE TO EMPLOYEE



General

Goal Template	ENU - SALES 2020	▼
Default Status	agreed	▼
Default Goal Type	Single	▼
Team		▼
Overwrite existing goals	<input checked="" type="checkbox"/>	

Filter: Employee

× No.	PS	▼
------------	----	---

+ Filter...

Filter totals by:

+ Filter...

OK

Cancel

Note: You can create Team Goals from „Employee Teams“ too.

2.4.3 Close Employee Goals

All employee goals inside the filter receive the status "closed". This function can only be performed by the "Goal Administrator" ([see point 1.2](#)).

2.4.4 Reopen Employee Goals

All employee goals inside the filter receive the status "open". This function can only be performed by the "Goal Administrator" ([see point 1.2](#)).

2.4.5 Delete Employee Goals

All Employee Goals inside the filter are deleted, including lines and deviations. This function can only be performed by the "Goal Administrator" ([see point 1.2](#)).

3. Employee Goals

Employee goals can be copied to one or more employees based on Goal templates, see [point 2.4.2 "Copy to Employee / Team"](#).

You can also add employee goals directly to the employee without a template:

1. Choose the  icon, enter **Employees (List)**, and then choose the related link.
2. Click Actions > Goals
3. Under "New" you can create a new Goal for the employee.
4. You have to show the field "Assigned to" with Personalisation. Here you have to link the goal to an employee

The capturing of the Goal Header and the Goal Lines takes place analogously to the Templates see point 2. "Goal Templates". Employee goals can also be printed, a report is available under Report > Print.

3.1. Header Information

Only the fields that differ from the template are listed:

Field	Meaning
Assigned to	Displays the name of the linked employee.
Goal Template Code	Displays the field "Code" of the linked Goal template.
Status	<p>Open: describes the entry mode of the employee Goal. In the "Open" status, setup fields, Goal Values, levels, deviations, and structures / rows can be created. Fields are changeable.</p> <p>Agreed: this status describes the fixation or agreement of the goal, ideally together with the employee. Goal Values can no longer be changed. Actual values and notification date can be changed at any time.</p> <p>closed: Employee Goal is no longer active. It thus falls out of all evaluations and fast entry masks. Closed goals can be open again with the function see 2.4.4. "Open Employee Goals".</p> <p>Closed goals are displayed in the screen Management Management > Archive > Closed Employee Goals.</p>
Goal Type	Single: There is a 1: 1 assignment of the Goal to an Employee

	Team: There is an assignment of the Goal to a Team Job: not defined
Goal Attainment in %	The calculation takes place in the status "agreed" during the input of the actual values. All active employee rows that have a weighting factor > 0 and a "Goal Attainment in %" are included in the calculation of the total value. Calculation Example see in Point 3.3 "Attainment of Goals"
Modified on, Modified by	Displays the date, time and user of the last change of header or line information.
Score	Represents the sum of all employee lines with a score.

3.2. Line Information

Only the fields that differ from the Goal Template Line are listed:

Field	Meaning
Actual Value Text	Here the employee have to enter the actual value of his "Goal Attainment". For Input Datatype "Number / Value" or "Date" there is no lookup functionality. You have to enter your value directly in the field.
Goal Attainment in %	After entering the Actual Value, the calculation of the field "Goal Attainment in %" is triggered.
Goal Attainment Comment	Here, the employee can enter a comment that is related to his Actual Value. For Example a comment why the goal could not be achieved or other circumstances that affect the Attainment of the goal.
Goal Attainment Date	This is the date on which the goal is to be Reached. If Email Notification is true an Email will be sent on this Date. See 6. Notification
Texts	Shows if texts exists for this line

3.3 Attainment on Goals

The Goal Attainment represents the degree of fulfillment or progress of a goal.

The calculation of the field "Goal Attainment in %" field is as follows:

1. If subordinate level exists:

Calculation according to Weighting Factor and "Goal Attainment in %" of Subordinate levels:

Line 1		Goal Attainment in % = 33.33
Line 1.1	Weighting Factor: 2 (66.67%)	Goal Attainment in % = 0
Line 1.2	Weighting Factor: 1 (33.33%)	Goal Attainment in % = 100

2. If no subordinate level exists:**Yes / No Value:**

Goal Value = Actual Value -> 100%, Goal Value <> Actual Value -> 0%

Number / value:

Goal Value = 5, Actual Value = 4 -> = 80% (Goal Attainment is linear = Yes)

Non linear Attainment: The Goal Attainment is taken from table "Employee Goal Line Deviation"

Date:

Goal Attainment Percentage is taken from table "Employee Goal Line Deviation" depending on the Date Formula. Attention: The "Goal Attainment Date" is not decisive.

Selection:

Goal Attainment Percent is taken from table "Employee Goal Line Deviation" depending on the Selected Value.

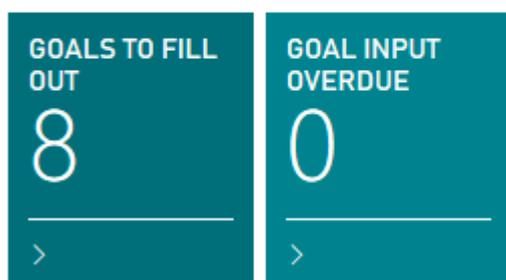
3.4 Role Center

In the role center there are 2 tiles for the module Leadership Management. Here employees can see at a glance which goals you have to maintain and which are already overdue. When clicking on the corresponding tile, the Quick Employee Entry Page opens. This is a reduced view of the Employee's Goal lines and contains exactly the information needed by the employee to quickly capture their Actual Values directly from the role center. Only Goals that have the checkbox "Value to Set (Employee)" = true and "Active" = true where displayed.



Activities

My Employee Goals



This Tiles and the headline functionality will be available in the following role centers:

- Accountant (9027)
- Business Manager (9022)
- Sales Order Processor (9006)
- Production Planner (9010)

4. Team Goals

Team Goals allow you to group multiple employees into a team, assign them to a team leader, and keep track of the overall Goal Attainments of all team members.

SALES CONSULTANTS

Employee Goals | Actions | Navigate | Fewer options

General

Code	SALES CONSULTANTS	Goal Attainment in % ...	40,77
Name	Sales Consultants Region DACH	Total Score	0
Team Manager No.	PS	Number of Members	3
Team Manager Name ...	Peter Schlösser		

Lines | Manage 

Employee No. ↑	Employee Name	Team Goal No.	Goal Attainment %	Score
LM	Laura Martin	ANL000160	47,21	0
MD	Marlies A. Dressler	ANL000170	57,56	0
→ MH	Michael Holm	ANL000180	17,56	0

First you have to create a new team:

Choose the  icon, enter **Employee Team List**, and then choose the related link.

Create a new team using New.

A team leader can be selected.

In the lines, you can any team members.

Furthermore, the field "Goal Attainment in %" provides information about the Average Goal Attainment of the "agreed" team goals of all team members.

Team members without an agreed team goal contribute 0% to the rating.

Note: Each employee can only have exactly one agreed team goal.

To create new team goals for the employees you can choose the action "Create Employee Team Goals".

COPY GOAL TEMPLATE TO EMPLOYEE



General

Goal Template *

Default Status agreed

Default Goal Type Team

Team OKR 2

Overwrite existing goals

Filter: Employee

× No.

+ Filter...

Filter totals by:

+ Filter...

You have to choose an existing goal template.

5. Scoring System

In addition to "Goal Attainment in %", the integrated Scoring system can also be used. This is a points system which simply adds up a score over all employee Goal lines.

Scores are not weighted or united. They are determined depending on the Actual Value reached and summed up over several lines.

The score can be displayed in the Register "Deviations". For each Deviation, the score is determined.

Points can represent monetary amounts, internal performance indicators (KPIs) or any other values.

5.1. Special Case "Goal Attainment is linear"

If the Goal line is the Goal data type "Number / Value" and the field "Goal Attainment is linear" = Yes, then the "Attainment in %" is automatically calculated based on the deviation from Goal Value to Actual Value.

To do this, use the field "Score Base".

Example:

Goal Value = 220

Actual Value = 165

Score Base = 100

Calculation Result = $165/220 * 100 = 75$ (Actual Value / Goal Value * Score Base)

6. Notifications

There is the possibility to send notifications by email to the respective employee. Messaging uses the standard Microsoft SMTP functionality E-mailing.

The Email is only sent if the fields in "Employee Goal Line" have these values :

1. "Goal Attainment Date" in "Employee Goal Line" = WorkDate
2. Active = true
3. Email Notification = true

To automatically send notifications, you must include the report 70300081 "Employee Goal Notification" in the Microsoft Standard "Job Queue Entry" (recommended setting: once a day).

To manually send notifications, do the following:

1. Click Management > Periodic Activities > "Create Employee Goal Notifications".
2. A tick in the field "Force Notifications" on the Options tab causes the Goal Line's "Notification Date" field to be ignored. This means that you can also later send notifications for a specific line via this manual call, even if the notification date has already been exceeded.

Prerequisites:

- The assignment of employee to user exists, see [point 1.2. "User Setup"](#)
- The standard Microsoft facilities (SMTP Mail Setup, email addresses at the user) are maintained correctly for sending emails.
- a job queue entry with report 70300081 is active for automatic dispatch

The Microsoft standard List "Sent Notification Entries" contains an overview of all sent notifications.

7. OKR Scenario

You can use the “Employee Teams” to bundle your goals.
 Create a new Employee Team, for Example “OKR Marketing 2021”.

Employee Team Card

Employee Goals
 Create Employee Goals...
 Close Employee Goals...
 Reopen Employee Goals... ⋮

General

Code

Name

Team Manager No. ▾

Team Manager Name ...

Goal Attainment in % ...

Total Score

Number of Members

Lines | Manage

Employee No. ↑	Employee Name	Team Goal No.	Goal Description	Goal Attainment %
PS	Peter Schlösser	—	—	0.00
TS	Thorsten Scholl	—	—	0.00
TZ	Thomas Zeilund	—	—	0.00
→ JR	Joachim Richter			0.00

The OKR Master can be the team manager.
 In the Lines you have to add all employees for this team.
 After this you can “Create Employee Goals” (Action) for all Employees inside the team.
 Choosing a “Goal Template” is necessary for this action. (For example the “OKR Base Structure” Template from the RapidStart package).
 Later you can customize this Employee Goal individually.
 After pressing OK, each Employee has received the same OKR Team Goal.
 Note: Only agreed goals are shown in the fields “Team Goal No.” and “Goal Description”.

COPY GOAL TEMPLATE TO EMPLOYEE 

General

Goal Template OKR - BASE STRUCTURE ▾

Default Status agreed ▾

Default Goal Type Team ▾

Team OKR MARKETING 2021 ▾

Overwrite existing goals

Filter: Employee

× No. ▾

+ Filter...

Filter totals by:

+ Filter...

Now you can go to each line in the “Employee Goals” and define individually the final “OKR Goal” for this employee.

Code	<input type="text" value="OKR MARKETING 2021"/>	Goal Attainment in %	<input type="text" value="87.06"/>
Name	<input type="text" value="Marketing Team Q1 Goals 2021"/>	Total Score	<input type="text" value="0"/>
Team Manager No.	<input type="text" value="MH"/> ▾	Number of Members	<input type="text" value="4"/>
Team Manager Name	<input type="text" value="Michael Holm"/>		

Lines		Manage 		
Empl... No. ↑	Employee Name	Team Goal No.	Goal Description	Goal Attainment %
→ JR	Joachim Richter	ANL000380	newsletter campaign new kitchen modell x19	56.25
PS	Peter Schlösser	ANL000390	update Product Catalogue x19	100.00
TS	Thorsten Scholl	ANL000400	training of team production	92.00
TZ	Thomas Zeilund	ANL000410	presentation CEO x19	100.00

If you have weekly OKR Meetings, you can go to your team goal. First change the “Actual Value” to the new one. And then via “Manage” you can add any texts to log your goal progress. With personalization you can add some fields from the corresponding employee goal line. These fields were logged by creating a new text line. The fields are:

- Actual Value Text

- Line No.
- Description
- Description 2
- Goal Definition
- Goal Attainment Date
- Changed at
- Changed from

← FTY EMPLOYEE GOAL LINE TEXTS | WORK DATE: 1/27/2022 ✓ SAVED   

Search + New Edit List Delete Open in Excel  

Comment	Comment 2	Changed at	Actual Value Text
Weekly 22.06.2021	Sending Mails to All Customers	6/22/2020 12:04 PM	45
→ Weekly 27.06.2021	Wrong Emailaddresses, resend Mails	6/22/2020 12:06 PM	70

If the OKR Period is over, you can close all goals inside the team (via Actions by pressing “Close Employee Goals”). If you want to analyze your goals after closing, you can add a “Goal Category” inside the closing process:

PROCESS EMPLOYEE GOALS 

General

Action ▼

Team Code ▼

Goal Category ▼

To have an overview over this closed bundle of goals you can filter in the analysis report by the new “Goal Category” and status = closed.

GOAL ATTAINMENT ANALYSIS | WORK DATE: 1/27/2022

✓ SAVED



FILTER

Template [dropdown] Employee [dropdown] ...

Team Code [dropdown] ... To Level [dropdown] 0 ...

Status closed Description [dropdown]

Employee Goal [dropdown]

Filters [X]

Filter list by:

× Level

[input: 0]

× Goal Category

[dropdown: OKR MARKETG Q1_2020]

+ Filter...

Reset filters

Employee No. ↑	Goal Template Code	Employee Goal No. ↑	Employee Name	Goal Category	Goal Attainment in %
JR	OKR - BASE ST...	ANL000380	Joachim Richter	OKR MARKET...	87.50
→ PS	OKR - BASE ST...	ANL000390	Peter Schlösser	OKR MARKET...	100.00
TS	OKR - BASE ST...	ANL000400	Thorsten Scholl	OKR MARKET...	92.00
TZ	OKR - BASE ST...	ANL000410	Thomas Zeilund	OKR MARKET...	100.00

Employee Goal No. ANL000390 Goal Template OKR - BASE STRUCTURE

Employee PS

8. Analysis Report

Choose the icon, enter **Goal Attainment Analysis**, and then choose the related link.

In this matrix view, you receive an overview of the current status of Goal Attainments for all Employees. When called up from the menu, the analysis is initially empty and requires a filter entry in the header. It can be filtered according to a template, a team or employees (multiple selection by marking possible).

Use the field "To level" to control the level to which the goals are displayed.

The default setup with 0 levels:

← GOAL ATTAINMENT ANALYSIS | WORK DATE: 1/27/2022

✓ SAVED  

FILTER

Template Employee

Team Code To Level

Status Description

 Employee Goal 

Employee No.	Goal Tem... Code	Employee Goal No.	Employee Name	Goal Category	Goal Attainment in % ↓	Calculated Score
→ TZ	OKR -...	ANL000410	Thomas Zeilund	OKR MARKET...	100.00	0
PS	OKR -...	ANL000390	Peter Schlösser	OKR MARKET...	100.00	0
JR	OKR -...	ANL000280	Joachim Richter		100.00	0
MH	OKR -...	ANL000130	Michael Holm		100.00	40
TS	OKR -...	ANL000400	Thorsten Scholl	OKR MARKET...	92.00	0
JR	OKR -...	ANL000380	Joachim Richter	OKR MARKET...	87.50	0
LM	ENU -...	ANL000160	Laura Martin		84.05	0
JR		ANL000100	Joachim Richter		50.00	0
MH	ENU -...	ANL000200	Michael Holm		17.23	0

Employee Goal No. : ANL000410 Goal Template : OKR - BASE STRUCTURE

Employee : TZ

view with level 1:

← GOAL ATTAINMENT ANALYSIS | WORK DATE: 1/27/2022

✓ SAVED  

FILTER

Template Employee

Team Code To Level

Status Description

 Employee Goal 

Employee No.	Goal Tem... Code	Employee Goal No.	Employee Name	Goal Category	Goal Attainment in % ↑	Calculated Score	Level 1
LM	ENU -...	ANL000160	Laura Martin		89.23	0	task-related
TS	OKR -...	ANL000400	Thorsten Scholl	OKR MARKET...	92.00	0	
TS	OKR -...	ANL000400	Thorsten Scholl	OKR MARKET...	92.00	0	OKR Goal
JR		ANL000100	Joachim Richter		100.00	0	Choose Template
MH	OKR -...	ANL000130	Michael Holm		100.00	40	
MH	OKR -...	ANL000130	Michael Holm		100.00	40	OKR Goal
JR	OKR -...	ANL000280	Joachim Richter		100.00	0	
JR	OKR -...	ANL000280	Joachim Richter		100.00	0	OKR Goal

Employee Goal No. : Goal Template :

Employee :