

# OKR Intake Tool User Guide

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## **2 Scope**

This QuickStart Guide (QSG) covers the basic steps to the OKR Intake data entry process. A more detailed User Guide will be published at a later date after development of the OKR Intake Tool is closer to production release.

## **3 Synopsis**

The OKR Intake Tool is documented by breaking down the OKR Intake Process Flow into the Stages appearing in the User Interface (UI). Each Stage is defined by the UI fields required to advance from a given stage to the

next stage in the Process Flow. Required and optional fields are clearly defined for each stage, as are the criteria required to advance to the next Stage. A glossary appears in the appendix.

## 4 Target Audience

The OKR Intake Tool is used by Leadership, Management, Project Managers, DCS-BI Team members, and anyone else who requires usability of, or visibility into, the OKR process.

## 5 Interface Navigation

### 5.1 Menu bar

[Screen shot here]

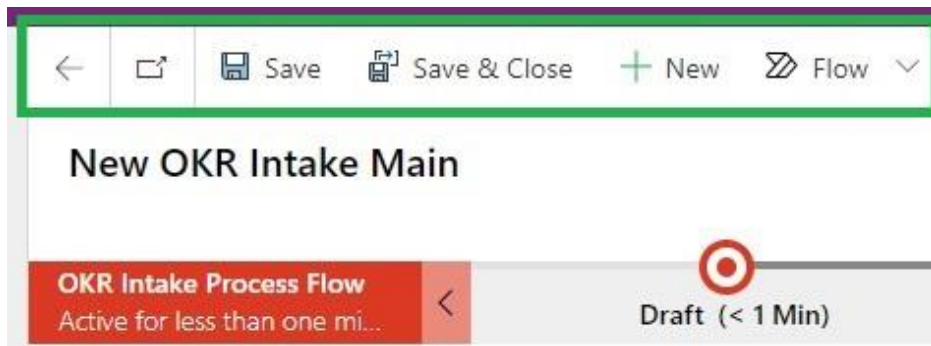


FIGURE 5.1. MENU BAR AT THE TOP OF THE BROWSER WINDOW

The menu bar at the top of the browser contains the New, Save, and the Save & Close buttons.

NOTE: The OKR can be saved at any point during the data entry process.

### 5.2 OKR Intake Tool Process Flow menu bar



FIGURE 5.2. OKR INTAKE TOOL PROCESS FLOW MENU BAR

The OKR Intake Process Flow menu bar contains the Stage indicators and controls for moving the KR to the next (or) previous stage. When clicked the Stage icons display dialog boxes indicating data required to move the KR to the next Stage and the buttons for moving the KR to the next stage. (See 6.6 Move to Next Stage Button in Controls below).

## 6 Document Conventions

- Mouse clicks are performed with the left mouse button unless otherwise instructed.
- Variables are [bracketed].
- Buttons, zones, and items to be clicked on are boxed.

## 7 Controls

### 7.1 Drop down selection field

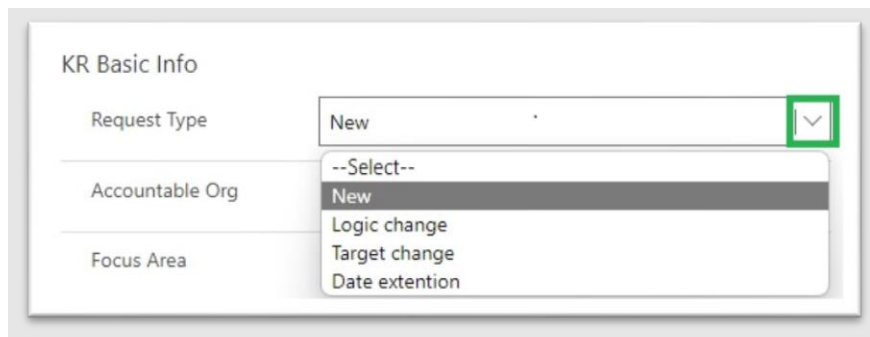


FIGURE 7.1 DROP DOWN SELECTION FIELD

Click the **down caret** to reveal the selectable options, then click the **desired option** to select it.

### 7.2 Searchable lookup field

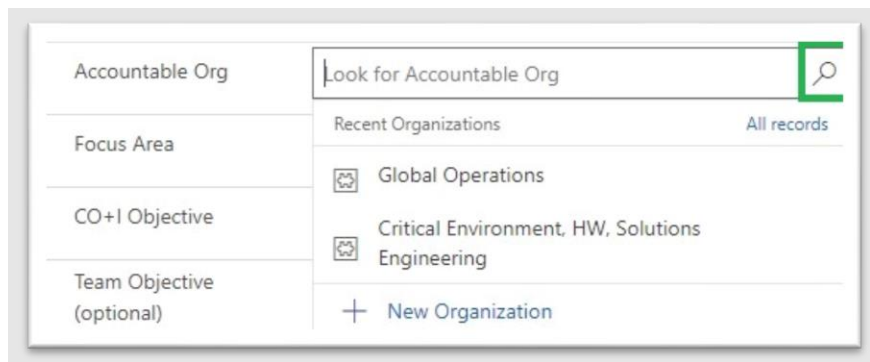


FIGURE 7.2.1. SEARCHABLE LOOKUP FIELD

Click the **search icon** to reveal the selectable options, then click the **desired option** to select it.

**NOTE:** Searches using wildcards (\*.variable) can be performed in the searchable lookup fields.

To add a new selectable option in the searchable lookup field, click **+ New** [field name]

A dialog box will appear.

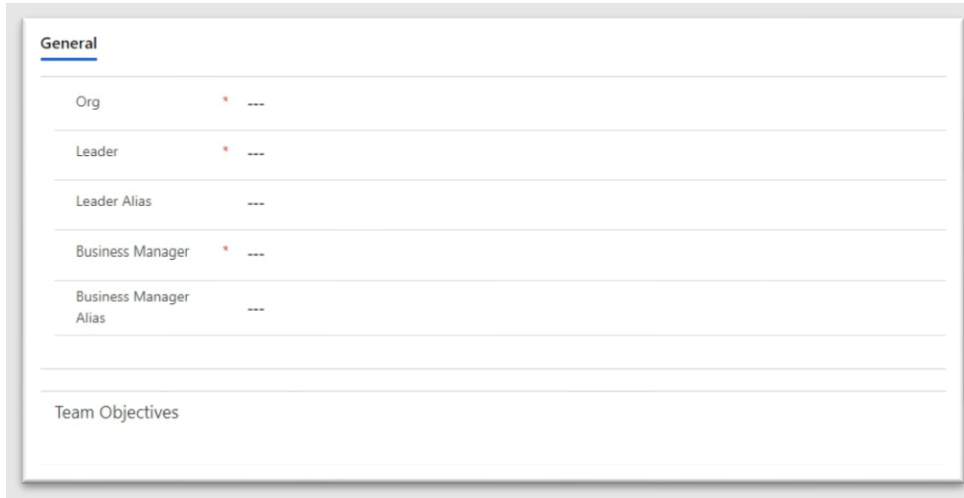


FIGURE 7.2.2. ADD NEW SELECTABLE OPTION DIALOG BOX

Click each **data entry field** and enter the [requested information] to add the new selectable option.

### 7.3 Text entry field

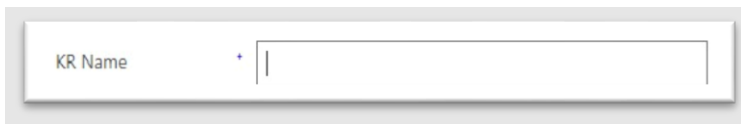


FIGURE 7.3. TEXT ENTRY FIELD

Click the **field** to enter the text data.

### 7.4 Rich text entry field



FIGURE 7.4. RICH TEXT ENTRY FIELD

Click the **field** to enter the rich text data.

## 7.5 Calendar date selection box

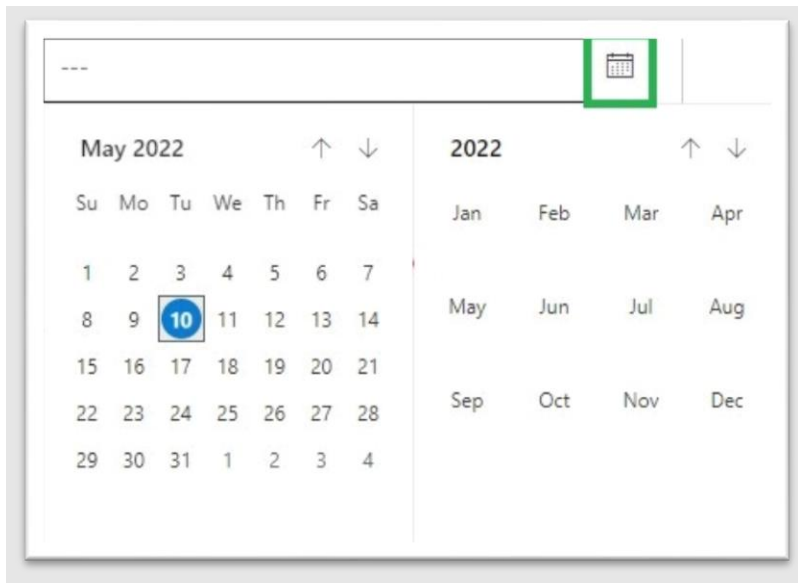


FIGURE 7.5. CALENDAR DATE SELECTION BOX

Click the **calendar icon** to reveal the date selection dialog box.

Click the **desired option(s)** to select them.

## 7.6 Move to Next Stage button

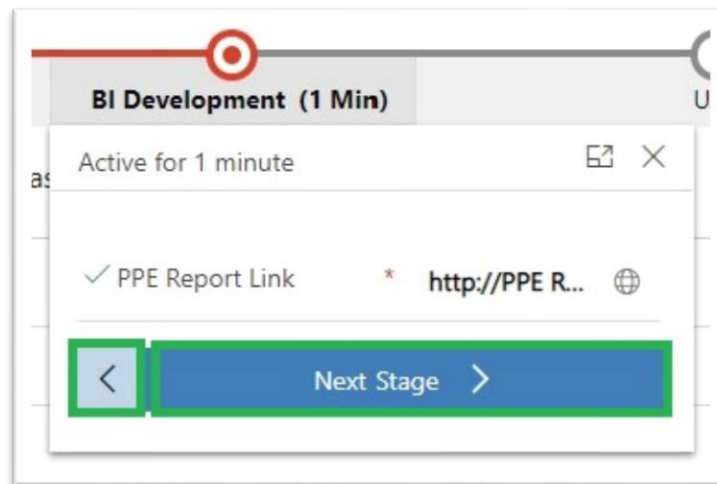


FIGURE 7.6. MOVE TO NEXT STAGE BUTTON

Click the **Next Stage >** button to move the KR to the next Stage.

Click the < in the Next Stage button to revert to the previous stage.

## 8 Process Diagram

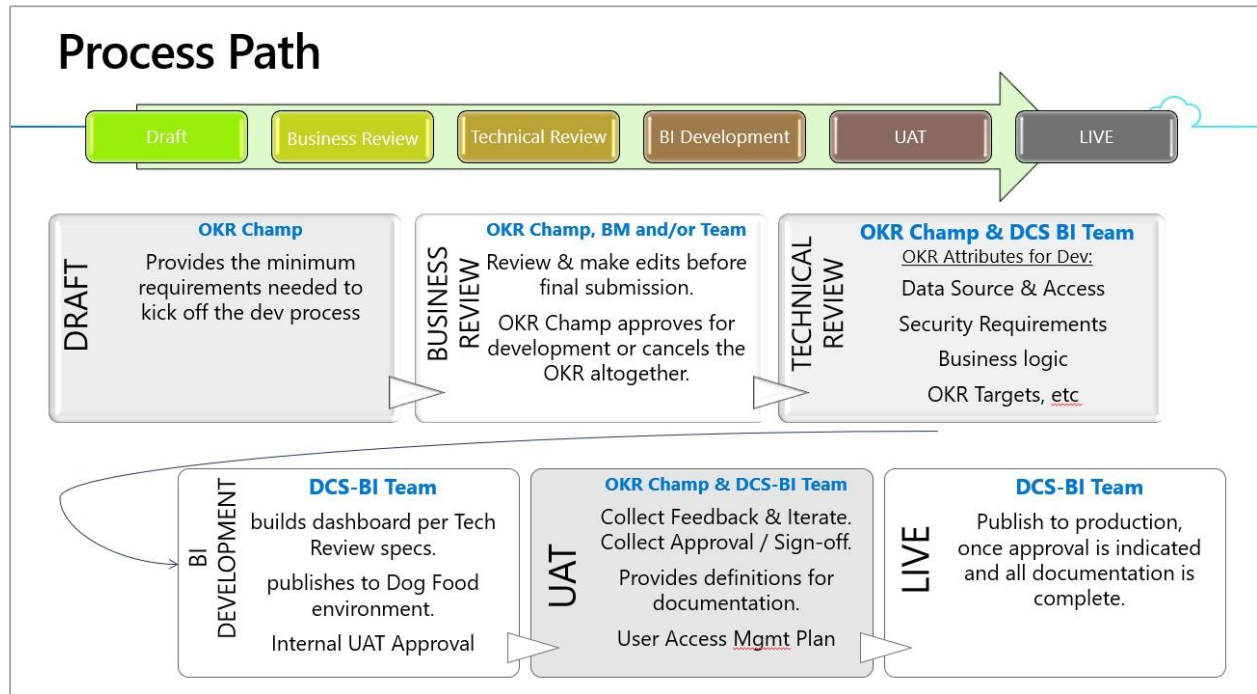


FIGURE 8. PROCESS DIAGRAM

## 9 Process

### 9.1 Draft Stage

Description: During the Draft stage the essential business requirements for the KR are specified by the KR Champion.

NOTE: All required fields for this stage appear in the Business Input Tab.

#### 9.1.1 Open a New OKR

Click + New in the menu bar at the top of the screen.

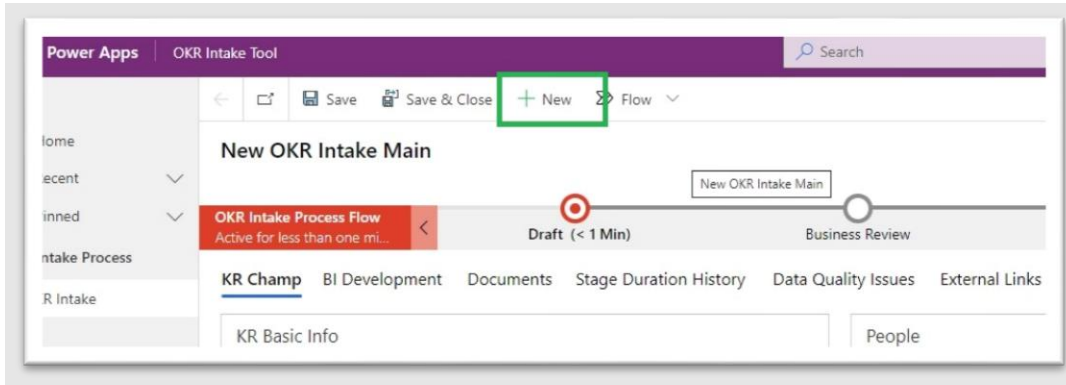


FIGURE 9.1.1. THE + NEW BUTTON IN THE OKR INTAKE TOOL MENU BAR

A new OKR draft screen is displayed

NOTE: The browser does not open a new tab.

## 9.1.2 KR Basic Info Section (required fields\*)

KR Basic Info	
Request Type	New
Accountable Org	---
Focus Area	---
CO+I Objective	---
Team Objective (optional)	---
KR Name	+ ---
Fiscal Year	---
Target Maturity	Baselining
Target	---
Highest Reporting Level	---
KR Description	Enter text...

FIGURE 9.1.2.1. THE BASIC INFO SECTION OF THE BUSINESS INPUT TAB

### 9.1.2.1 Request Type\*

Definition	Used to specify the type of request the KR makes
------------	--



Selectable options	<ul style="list-style-type: none"> <li>• New (a new KR)</li> <li>• Logic Change (a change to the logic of an existing KR)</li> <li>• Target Change (a change to the target of an existing KR)</li> <li>• Date Extension (a change to the scheduled delivery date of an existing KR)</li> </ul>
Field Type	Drop down selection field
Field Location	OKR Intake Main form > Business Input tab

### 9.1.2.2 Accountable Org\*

Definition	Used to specify the organization accountable for requesting the KR
Field type	Searchable lookup field
Field location	OKR Intake Main form > Business Input tab
NOTE: The Leader Full Name and Business Manager fields in the People section will be populated after the accountable org selection is made.	

### 9.1.2.3 Focus Area\*

Definition	Used to specify the CO+I Focus Area applicable to the KR. Each Focus Area has specific CO+I objectives associated with it
Field type	Searchable lookup field
Field location	OKR Intake Main form > Business Input tab

### 9.1.2.4 CO+I Objective\*

Definition	Used to specify the CO+I objective applicable to the KR. These objectives are tied to the Focus Area previously selected
Field type	Searchable lookup field
Field location	OKR Intake Main form > Business Input tab

### 9.1.2.5 Team Objective (optional)

Definition	An optional field used to specify a team objective that maps to the CO+I objective
Field type	Searchable lookup field
Field location	OKR Intake Main form > Business Input tab

### 9.1.2.6 KR Name\*

Definition	Used to specify the name of the KR. This will be the name that will be used for the Fundamentals (or equivalent/other) meetings
Field type	Text input field

Field location	OKR Intake Main form > Business Input tab
NOTE: The Dashboard may need to shorten the KR Name due to space constraints	

### 9.1.2.7 Fiscal Year\*

Definition	Used to specify the Fiscal Year for which reporting/budgeting will be tracked
Selectable options	<ul style="list-style-type: none"> <li>FY22 (7/1/2021 - 6/30/2022)</li> <li>FY23 (7/1/2022 - 6/30/2023)</li> <li>FY24 (7/1/2023 - 6/30/2024)</li> </ul>
Field type	Searchable lookup field
Field location	OKR Intake Main form > Business Input tab

### 9.1.2.8 Target Maturity\*

Definition	Used to specify the current maturity of the KR
Selectable options	<ul style="list-style-type: none"> <li>Established- The KR has been tracked for a year [or] at least a semester. Current performance is understood.</li> <li>Baselining- a new KR [or] a substantial change to an existing KE where the performance is not well understood</li> </ul>
Field type	Drop down selection field
Field location	OKR Intake Main form > Business Input tab

### 9.1.2.9 Target\*

Definition	Used to specify the fiscal year target for the KR along with the unit(s) of measurement for the KR
Field type	Text input field
Field location	OKR Intake Main form > Business Input tab
Examples	Count of X, MW, Percent, count of X per MW

### 9.1.2.10 Highest Reporting Level\*

Definition	Used to specify the highest level of visibility for the KR
Selectable options	<ul style="list-style-type: none"> <li>CO+I Fundamentals (Noelle)- Selecting this option means that this KR will be presented in CO+I Fundamentals, and will be visible</li> <li>1 level below (Noelle direct reports)</li> <li>2 levels below (Noelle skip reports)</li> <li>Local Team Only (all other OKRs)</li> </ul>

Field type	Drop down selection field
Field location	OKR Intake Main form > Business Input tab

### 9.1.2.11 KR Description\*

Definition	Used to add any additional information about the OKR
Field type	Rich text entry field
Field location	OKR Intake Main form > Business Input tab
NOTE: Include Year over Year (YoY) changes being made to the KR	

The screenshot shows a 'KR Basic Info' form with the following fields and values:

- Request Type: New
- Accountable Org: Global Operations
- Focus Area: Innovation
- CO+I Objective: Lead the industry in innovation
- Team Objective (optional): test description
- KR Name: Documentation Test for QuickStart Guide
- Fiscal Year: FY23
- Target Maturity: Baselining
- Target: To be complete when OKR Intake Tool is released
- Highest Reporting Level: CO+I Fundamentals
- KR Description: The OKR Intake Tool QuickStart Guide will enable new users to generate new OKRs in the OKR Intake Tool. It will consist of step-by-step instructions for generating a new OKR and a synopsis of the OKR Process. An expanded User Guide will be published subsequently

FIGURE 9.1.2.2. THE KR BASIC INFO SECTION OF THE BUSINESS INPUT TAB WITH EXAMPLE ENTRIES.

## 9.1.3 Optional Section

FIGURE 9.1.3.1. THE OPTIONAL SECTION OF THE BUSINESS INPUT TAB.

### 9.1.3.1 Optional Report Link

Definition	Used to add a link to any report that is ready to integrate
Field type	Text entry field
Field location	OKR Intake Main form > Business Input tab
Example	<a href="https://msit.powerbi.com/groups/abc123/reports/def456">https://msit.powerbi.com/groups/abc123/reports/def456</a>

### 9.1.3.2 Optional App/Database Name

Definition	Used to enter the name of the application used to collect the data (or) the database in which the data resides
Field type	Text entry field
Field location	OKR Intake Main form > Business Input tab
Example	Monthly Diesel Fuel Usage

FIGURE 9.1.3.2. THE OPTIONAL SECTION OF THE BUSINESS INPUT TAB WITH EXAMPLE ENTRIES.

## 9.1.4 People Section (required fields\*)

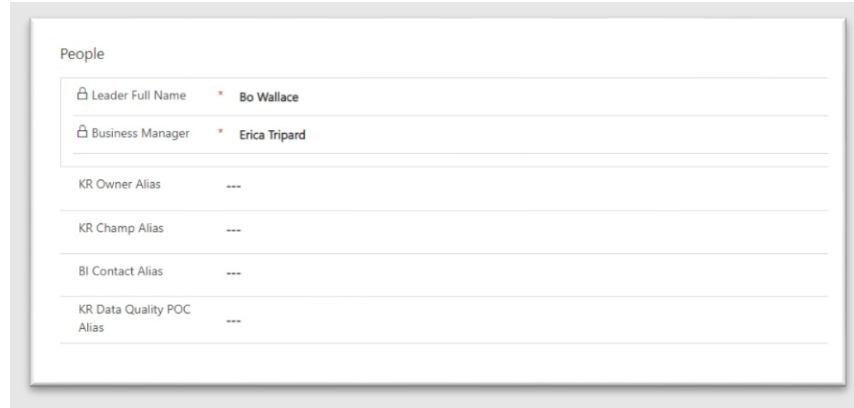


FIGURE 9.1.4.1. THE PEOPLE SECTION OF THE BUSINESS INPUT TAB.

#### 9.1.4.1 Leader Full Name\*

Definition	The Leader Full Name is autofilled after the Accountable Org is selected
Field type	Autofilled
Field location	OKR Intake Main form > Business Input tab
NOTE: The Leader Full Name field cannot be edited by the user	

#### 9.1.4.2 Business Manager\*

Definition	The Business Manager field is autofilled after the Accountable Org is selected
Field type	Autofilled
Field location	OKR Intake Main form > Business Input tab
NOTE: The Business Manager field cannot be edited by the user	

#### 9.1.4.3 KR Owner Alias\*

Definition	Used to identify the person who owns and reports on the KR
Field type	Email address input field
Field location	OKR Intake Main form > Business Input tab
Example	alias@microsoft.com

#### 9.1.4.4 KR Champ Alias\*

Definition	Used to identify the person who provides input to the BI Team during development
Field type	Email address input field
Field location	OKR Intake Main form > Business Input tab
Example	alias@microsoft.com

### 9.1.4.5 KR Contact Alias\*

Definition	Used to identify the person on the BI Team who is working on the OKR Dashboard for the KR
Field type	Email address input field
Field location	OKR Intake Main form > Business Input tab
Example	alias@microsoft.com
NOTE: The BI Team may reroute the KR as required	

### 9.1.4.6 KR Data Quality POC Alias\*

Definition	Used to identify the person serving as the Data Steward for the KR
Field type	Email address input field
Field location	OKR Intake Main form > Business Input tab
Example	alias@microsoft.com

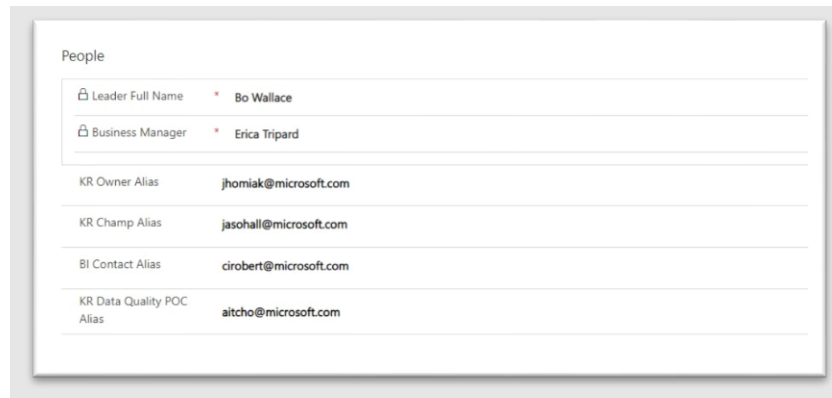


FIGURE 9.1.4.2. THE PEOPLE SECTION OF THE BUSINESS INPUT TAB WITH EXAMPLE ENTRIES.

## 9.1.5 Additional People Section (required fields\*)

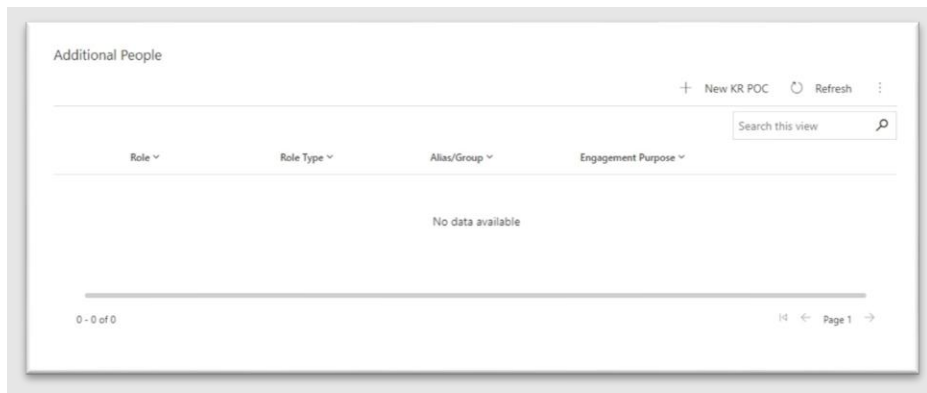


FIGURE 9.1.5.1. THE ADDITIONAL PEOPLE SECTION OF THE BUSINESS INPUT TAB.

### 9.1.5.1 Additional People

Definition	Used to identify any additional personnel who are associated with the KR after the draft is saved
Field type	Related table
Field location	OKR Intake Main form > Business Input tab
NOTE: This section of the UI becomes active only after the draft is saved.	

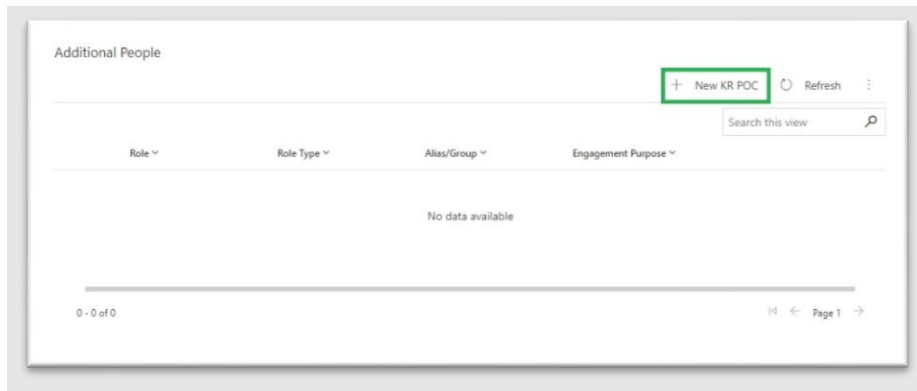


FIGURE 9.1.5.1.1. THE + NEW KR POC BUTTON IN THE ADDITIONAL PEOPLE SECTION OF THE BUSINESS INPUT TAB.

Click the +New KR POC icon to add a new KR POC.

The New KR POC dialog box is displayed.

### 9.1.5.2 New KR POC

FIGURE 9.1.5.1.2. NEW KR POC DIALOG BOX.

### 9.1.5.3 Alias/Group

Definition	Used to add the Alias/Group of a new KR point of contact to the KR
Field type	Text entry field
Field location	OKR Intake Main form > Business Input tab > New KR POC form

### 9.1.5.4 KR Main\*

Definition	Used to select the main KR (the currently viewed/modified KR) in the new KR point of contact to the KR
Field type	Searchable lookup field
Field location	OKR Intake Main form > Business Input tab > New KR POC form

### 9.1.5.5 Role Type

<u>Definition</u>	Used to select the role type of a new KR point of contact to the KR
<u>Selectable options</u>	<ul style="list-style-type: none"> <li>• Accountable</li> <li>• Consulted</li> <li>• Drive</li> <li>• Informed</li> <li>• Responsible</li> </ul>



Field type	Drop down selection field
Field location	OKR Intake Main form > Business Input tab > New KR POC form

### 9.1.5.6 Role

Definition	Used to select the role of a new KR point of contact to the KR
Field type	Searchable lookup field
Field location	OKR Intake Main form > Business Input tab > New KR POC form

### 9.1.5.7 Engagement Purpose

Definition	Used to enter the engagement purpose when adding a new KR point of access to the KR
Field type	Text input field
Field location	OKR Intake Main form > Business Input tab > New KR POC form

**9.1.5.8 Click Save in the OKR Intake Tool menu bar at the top of the browser screen.**

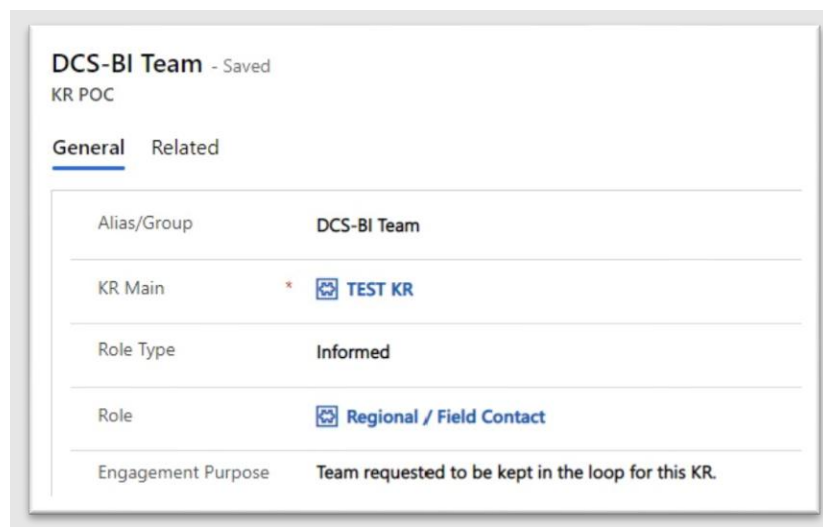


FIGURE 9.1.5.1.3. THE + NEW KR POC DIALOG BOX WITH EXAMPLE ENTRIES.

## 9.1.6 Move to Business Review Stage

### 9.1.6.1 Criteria

- Completion of all required fields in the Business Input tab.
- Review with the KR Owner and Business Manager to confirm they are ready to review the KR with the Organization Leader. If this KR is not in-scope for a Leader, then review with the highest applicable manager.

### 9.1.6.2 Procedure

- 1 Check all fields for completion and accuracy.
- 2 Click **Save** in the Menu Bar at the top of the browser.
- 3 Click the **Draft icon** in the OKR Intake Process Flow menu bar.
- 4 Click **Next Stage >** to move the KR to the Business Review stage.

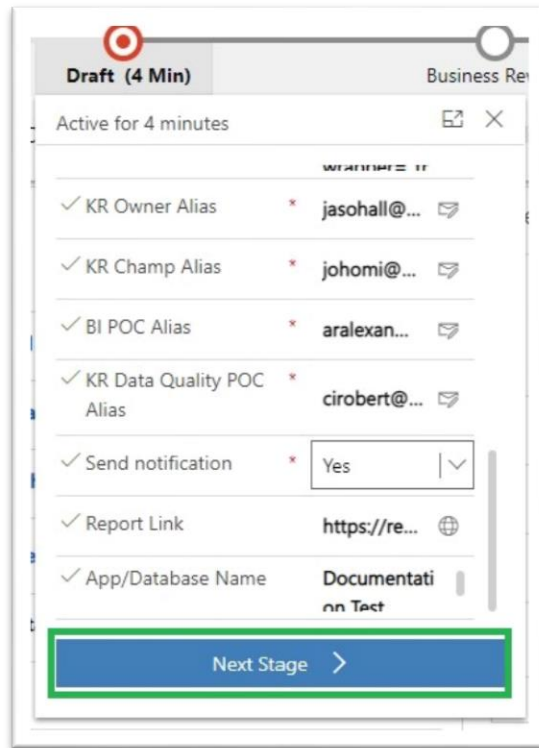


FIGURE 9.1.6. THE DRAFT- NEXT STAGE DIALOG BOX WITH EXAMPLE ENTRIES.

## 9.2 Business Review Stage

Description: During the Business Review stage the KR is reviewed and final edits are made. The OKR Champ then either approves the KR for development or cancels it.

NOTE: The only required field (Request Type) for this stage was completed during the Draft stage in the Business Input tab.

### 9.2.1 Move to Technical Review Stage

#### 9.2.1.1 Criteria

- Completion of all required fields in the Business Input tab.
- Review with the KR Owner and Business Manager to confirm they are ready to review the KR with the Organization Leader. If this KR is not in-scope for a Leader, then review the KR with the highest applicable manager.

### 9.2.1.2 Procedure

- 1 Check all fields for completion and accuracy.
- 2 Click **Save** in the Menu Bar at the top of the browser.
- 3 Click the **Business Review icon** in the OKR Intake Process Flow menu bar.
- 4 Click **Next Stage >** to move the KR to Technical Review stage.

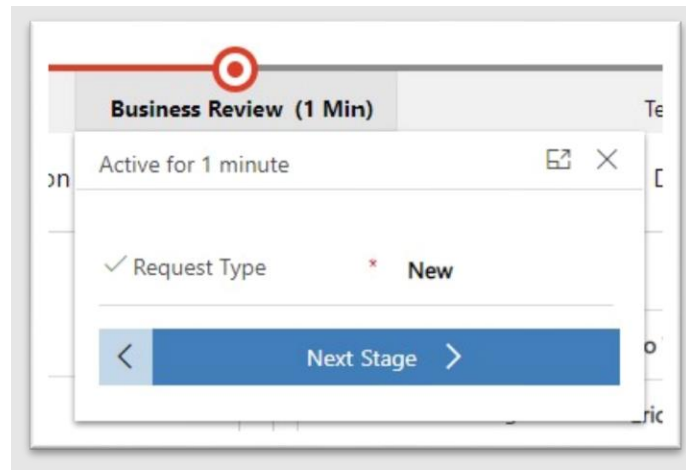


FIGURE 9.2.1.2. THE BUSINESS REVIEW- NEXT STAGE DIALOG BOX WITH EXAMPLE ENTRIES.

## 9.3 Technical Review Stage

Description: During the Technical Review stage the KR is reviewed and data sources and access to that data, security requirements, business logic, and OKR targets are comprehended.

**NOTE:** All required fields for this stage appear in the BI Development tab.

### 9.3.1 KR Target Info Section (required fields\*)

FIGURE 9.3.1.1. THE KR TARGET INFO SECTION OF THE BI DEVELOPMENT TAB.

#### 9.3.1.1 Target Type\*

Definition	Used to specify the target for the KR
------------	---------------------------------------

Selectable options	<ul style="list-style-type: none"> <li>• Flat</li> <li>• Cumulative</li> <li>• Custom</li> </ul>
Field type	Drop down selection field
Field location	OKR Intake Main form > BI Development tab

### 9.3.1.2 Target Direction\*

Definition	Used to specify the desired outcome either above or below the target
Selectable options	<ul style="list-style-type: none"> <li>• Above</li> <li>• Below</li> </ul>
Field type	Drop down selection field
Field location	OKR Intake Main form > BI Development tab
Examples	SLA <i>above</i> X% (or) Safety Incidents <i>below</i> Y threshold

### 9.3.1.3 Target Unit\*

Definition	Used to specify the unit of measurement for the desired outcome
Field type	Searchable lookup field
Field location	OKR Intake Main form > BI Development tab

### 9.3.1.4 Target Value\*

Definition	Used to specify the fiscal year and the description of the value of the desired outcome
Field type	Text entry field
Field location	OKR Intake Main form > BI Development tab
Example	Percent units

### 9.3.1.5 Target Starting Value\*

Definition	Used to specify the value at the beginning of the fiscal year
Field type	Text entry field
Field location	OKR Intake Main form > BI Development tab
NOTE: Enter 0 if starting at zero and working toward a goal. Enter the baseline value if it is already established.	

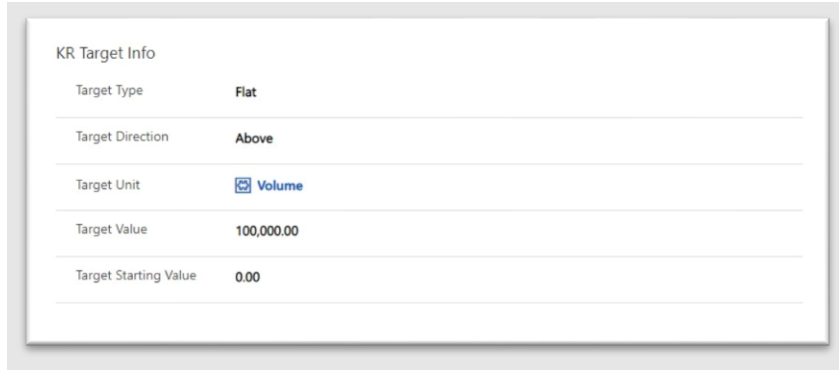


FIGURE 9.3.1.2. THE KR TARGET INFO SECTION OF THE BI DEVELOPMENT TAB WITH EXAMPLE ENTRIES.

## 9.3.2 KR Custom Target Info Section (required fields\*)

### 9.3.2.1 KR Custom Target Info

Definition	Used to specify custom target information for the KR
Field type	Related table
Field location	OKR Intake Main form > BI Development tab

Click **+New KR Custom Target** in the KR Custom Target Info section

The New KR Custom Target dialog box is displayed.

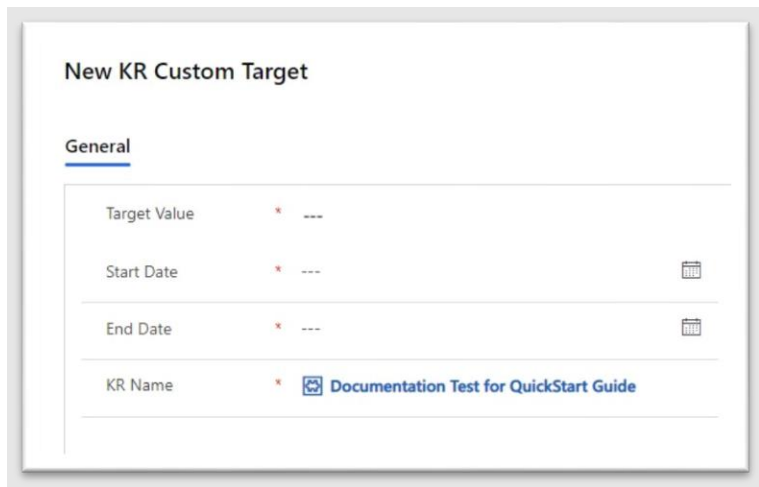


FIGURE 9.3.2.1. THE KR CUSTOM TARGET INFO DIALOG BOX.

### 9.3.2.2 Target Value\*

Definition	Used to specify the fiscal year and the description of the value of the desired outcome for a custom target for the KR
Field type	Text entry field
Field location	OKR Intake Main form > Business Input tab > New KR Custom Target form

### 9.3.2.3 Start Date\*

Definition	Used to specify a start date for a custom target for the KR
Field type	Calendar date selection box
Field location	OKR Intake Main form > Business Input tab > New KR Custom Target form

### 9.3.2.4 End Date\*

Definition	Used to specify an end date for a custom target for the KR
Field type	Calendar date selection field
Field location	OKR Intake Main form > Business Input tab > New KR Custom Target form

### 9.3.2.5 KR Name\*

Definition	Used to specify the KR name for a custom target for the KR
Field type	Searchable lookup field
Field location	OKR Intake Main form > Business Input tab > New KR Custom Target form

9.3.2.6 Click **Save** in the OKR Intake Tool menu bar at the top of the browser screen.

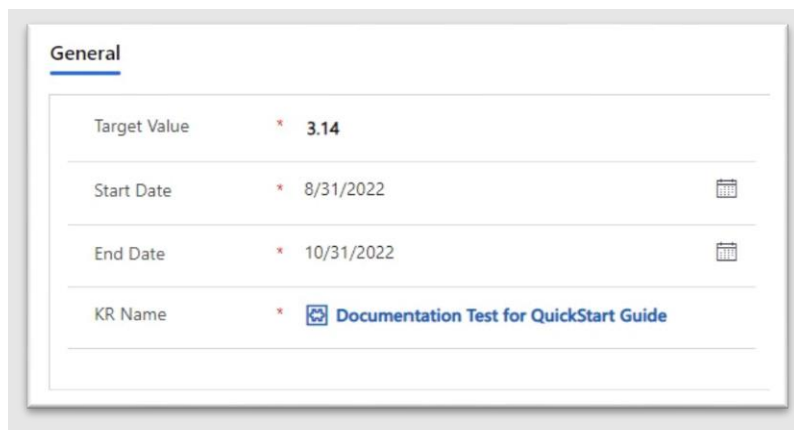


FIGURE 9.3.2.2. THE KR CUSTOM TARGET INFO DIALOG BOX WITH EXAMPLE ENTRIES.

## 9.3.3 Development Info Section (required fields\*)

### 9.3.3.1 Ally.io Report Link

Definition	Used to enter a URL to the Ally.io link pertaining to the KR
Field type	Text entry field
Field location	OKR Intake Main form > BI Development tab
Example	<a href="https://Ally.ioLink.microsoft.com">https://Ally.ioLink.microsoft.com</a>

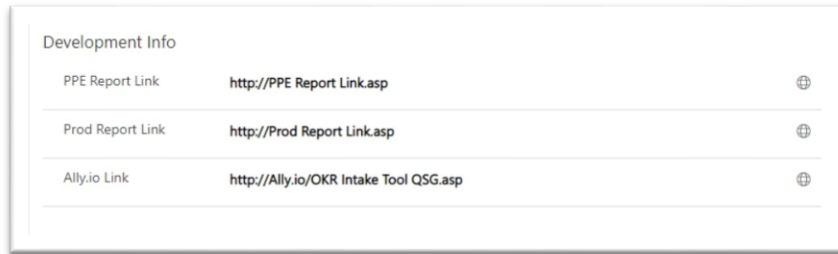


FIGURE 9.3.3. THE DEVELOPMENT INFO SECTION OF THE BI DEVELOPMENT TAB WITH EXAMPLE ENTRIES.

### 9.3.4 Technical Info Section (required fields\*)

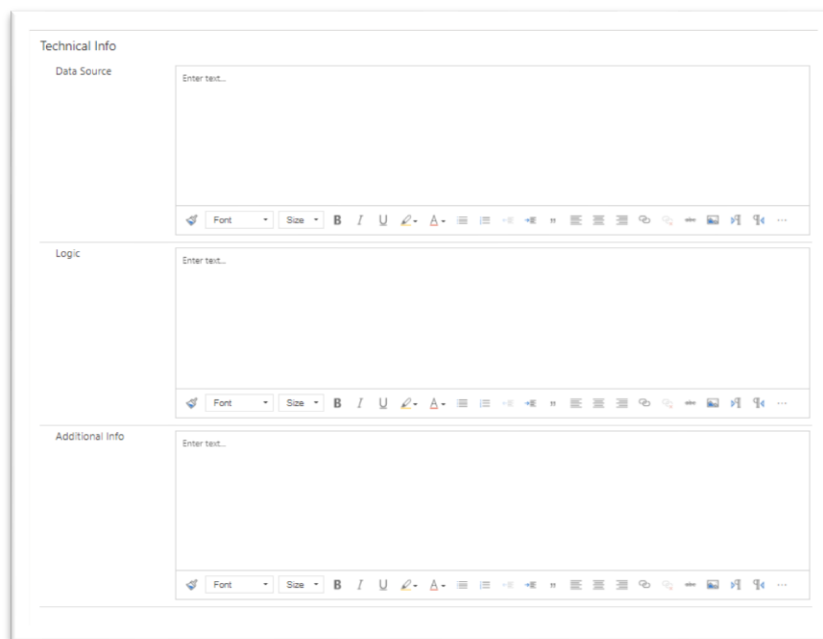


FIGURE 9.3.4.1. THE TECHNICAL INFO SECTION OF THE BI DEVELOPMENT TAB.

#### 9.3.4.1 Data Source\*

Definition	Used to specify the source of, and any additional information about, the data used for the KR
Field type	Rich text entry field
Field location	OKR Intake Main form > BI Development tab

#### 9.3.4.2 Logic\*

Definition	Used to specify the logic used for the KR
Field type	Rich text entry field
Field location	OKR Intake Main form > BI Development tab

### 9.3.4.3 Additional Info\*

Definition	Used to specify any additional information about the KR
Field type	Rich text entry field
Field location	OKR Intake Main form > BI Development tab

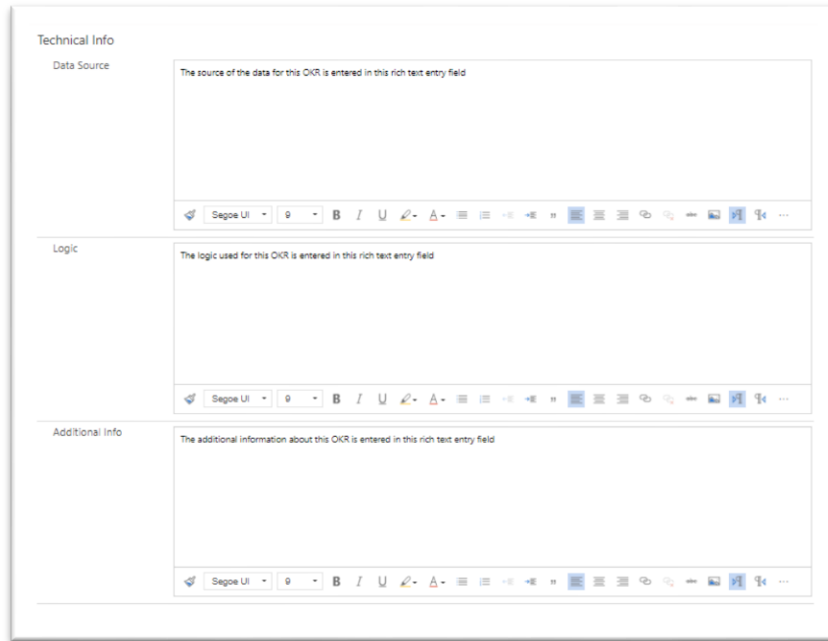


FIGURE 9.3.4.2. THE TECHNICAL INFO SECTION OF THE BI DEVELOPMENT TAB WITH EXAMPLE ENTRIES.

**9.3.4.4 Click Save in the OKR Intake Tool menu bar at the top of the browser screen.**

## 9.3.5 Move to BI Development Stage

### 9.3.5.1 Criteria

- Completion of all required fields in the Business Input tab.
- Review with the KR Owner and Business Manager to confirm they are ready to review the KR with the Organization Leader. If this KR is not in-scope for a Leader, then review with the highest applicable manager.

### 9.3.5.2 Procedure

- 1 Check all fields for completion and accuracy.
- 2 Click Save in the Menu Bar at the top of the browser.
- 3 Click the Technical Review icon in the OKR Intake Process Flow menu bar.
- 4 Click Next Stage > to move the KR to the BI Development stage.



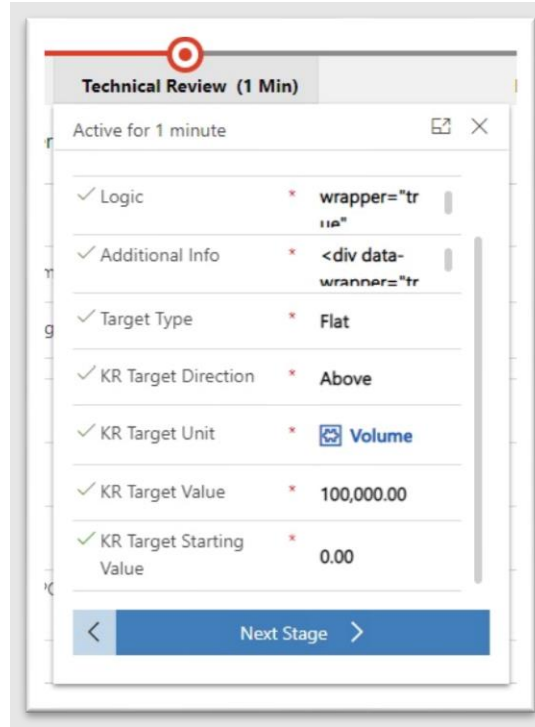


FIGURE 9.3.5. THE TECHNICAL REVIEW- NEXT STAGE DIALOG BOX WITH EXAMPLE ENTRIES.

## 9.4 BI Development Stage

Description: During the BI Development stage the DCS-BI Team builds the dashboard as defined in the technical review specifications, publishes the dashboard for User Acceptance Testing (UAT), and pushes for UAT approval.

NOTE: All required fields for this stage appear in the BI Development tab.

### 9.4.1 Development Info Section (required fields\*)

Development Info

PPE Report Link ---

---

Prod Report Link ---

---

Ally.io Link ---

---

FIGURE 9.4.1.1. THE DEVELOPMENT INFO SECTION OF THE BI DEVELOPMENT TAB.

#### 9.4.1.1 PPE Report Link\*

Definition	Used to enter a URL for the PPE Report pertaining to the KR
Field type	Text entry field
Field location	OKR Intake Main form > BI Development tab

Example	<a href="https://PPEReport.microsoft.com">https://PPEReport.microsoft.com</a>
---------	---

Development Info		
PPE Report Link	<a href="http://PPE Report Link.asp">http://PPE Report Link.asp</a>	🌐
Prod Report Link	<a href="http://Prod Report Link.asp">http://Prod Report Link.asp</a>	🌐
Ally.io Link	<a href="http://Ally.io/OKR Intake Tool QSG.asp">http://Ally.io/OKR Intake Tool QSG.asp</a>	🌐

FIGURE 9.4.1.2. THE DEVELOPMENT INFO SECTION OF THE BI DEVELOPMENT TAB WITH EXAMPLE ENTRIES.

## 9.4.2 Move to UAT Stage

### 9.4.2.1 Criteria

- Completion of all required fields in the Business Input tab.
- Review with the KR Owner and Business Manager to confirm they are ready to review the KR with the Organization Leader. If this KR is not in-scope for a Leader, then review with the highest applicable manager.

### 9.4.2.2 Procedure

- 1 Check all fields for completion and accuracy.
- 2 Click **Save** in the Menu Bar at the top of the browser.
- 3 Click the **BI Development icon** in the OKR Intake Process Flow menu bar.
- 4 Click **Next Stage >** to move the KR to the UAT stage.

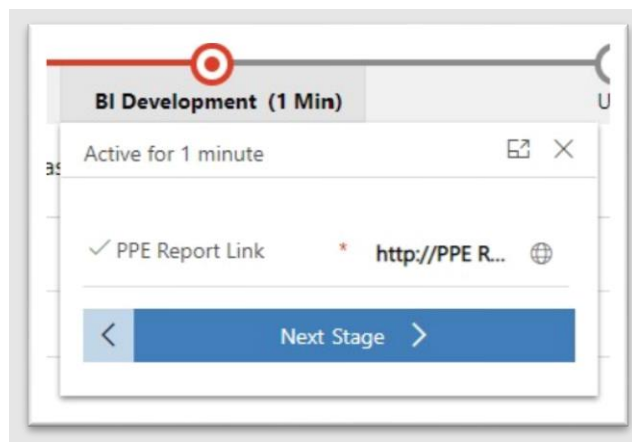


FIGURE 9.4.2. THE BI DEVELOPMENT- NEXT STAGE DIALOG BOX WITH EXAMPLE ENTRY.

## 9.5 UAT Stage

Description: During the User Acceptance Testing (UAT) stage the DCS-BI Team collects UAT feedback and iterates changes to the dashboard as necessary, collects approvals, and gains signoff for the KR. Definitions for documentation and the user access management plan are also completed during UAT.

**NOTE:** All required fields for this stage appear in the BI Development tab.

### 9.5.1 UAT Info Section (required fields\*)

FIGURE 9.5.1.1. THE UAT INFO SECTION OF THE BI DEVELOPMENT TAB.

#### 9.5.1.1 Security Groups for Access\*

Definition	Used to specify any Security Groups who will be granted access to the KR
Options	Group email alias
Field type	Searchable lookup field
Field location	OKR Intake Main form > BI Development tab

FIGURE 9.5.1.2. THE UAT INFO SECTION OF THE BI DEVELOPMENT TAB WITH EXAMPLE ENTRIES.

## 9.5.2 Move to Live Stage

### 9.5.2.1 Criteria

- Completion of all required fields in the Business Input tab.
- Review with the KR Owner and Business Manager to confirm they are ready to review the KR with the Organization Leader. If this KR is not in-scope for a Leader, then review with the highest applicable manager.

### 9.5.2.2 Procedure

- 1 Check all fields for completion and accuracy.
- 2 Click **Save** in the Menu Bar at the top of the browser.
- 3 Click the **UAT icon** in the OKR Intake Process Flow menu bar.
- 4 Click **Next Stage >** to move the KR to the Live stage.

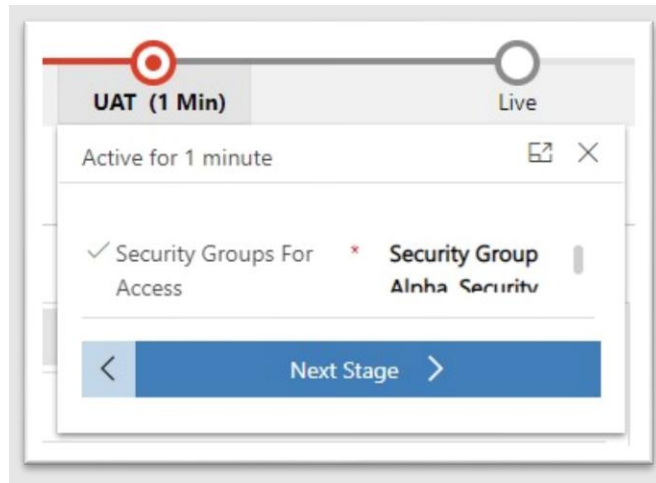


FIGURE 9.5.2. THE UAT- NEXT STAGE DIALOG BOX WITH EXAMPLE ENTRY.

## 9.6 Live Stage

Description: During the Live Stage, after approval is granted and all documentation is completed, the dashboard is published to production.

NOTE: All required fields for this stage appear in the BI Development tab.

### 9.6.1 Move to Finished Stage

#### 9.6.1.1 Development Info Section (required fields\*)

Development Info	
PPE Report Link	---
Prod Report Link	---
Ally.io Link	---

FIGURE 9.6.1.1. THE DEVELOPMENT INFO SECTION OF THE BI DEVELOPMENT TAB.

#### 9.6.1.2 Prod Report Link\*

Definition	Used to enter a URL for the Prod Report pertaining to the KR
Field Type	<u>Text entry field</u>
Field location	OKR Intake Main form > BI Development tab
Example	<a href="https://ProdReport.microsoft.com">https://ProdReport.microsoft.com</a>

Development Info		
PPE Report Link	<a href="http://PPE Report Link.asp">http://PPE Report Link.asp</a>	⊕
Prod Report Link	<a href="http://Prod Report Link.asp">http://Prod Report Link.asp</a>	⊕
Ally.io Link	<a href="http://Ally.io/OKR Intake Tool QSG.asp">http://Ally.io/OKR Intake Tool QSG.asp</a>	⊕

FIGURE 9.6.1.2. THE DEVELOPMENT INFO SECTION OF THE BI DEVELOPMENT TAB WITH EXAMPLE ENTRIES.

### 9.6.1.3 Criteria

- Completion of all required fields in the Business Input tab.
- Review with the KR Owner and Business Manager to confirm they are ready to review the KR with the Organization Leader. If this KR is not in-scope for a Leader, then review with the highest applicable manager.

### 9.6.1.4 Procedure

- 1 Check all fields for completion and accuracy.
- 2 Click **Save** in the Menu Bar at the top of the browser.
- 3 Click the **Live icon** in the OKR Intake Process Flow menu bar.
- 4 Click **Next Stage >** to move the KR to the Live stage.
- 5 Click **Finish** to complete the ORK Intake Process Flow procedure.

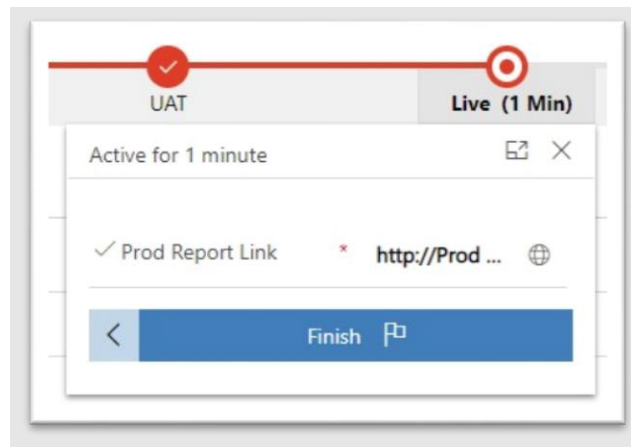


FIGURE 9.6.3.1. THE LIVE- (FINISH) DIALOG BOX WITH EXAMPLE ENTRY.

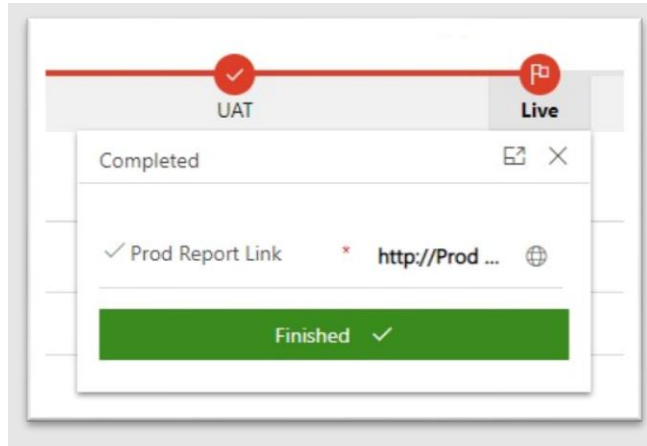


FIGURE 9.6.3.2. THE LIVE (FINISHED) DIALOG BOX.

## 10 Additional Tables

### 10.1 Key Results

New Key Result

OKR Intake Process Flow  
Active for less than one mi...

Draft (< 1 Min)    Business Review    Technical Review    BI Development

Business Input    BI Development    KR Manual Entry    Documents    Data Quality Issues    External Links    Data Source    Reports/Dashboards

KR Basic Info		People	
Request Type	New	KR Owner Alias	---
Accountable Org	---	KR Champ Alias	---
Focus Area	---	BI Contact Alias	---
CO+I Objective	---	KR Data Quality POC Alias	---
Team Objective (optional)	---	Additional People	
KR Name	* ---		
Metric Name	---		
Fiscal Year	---		
Target Maturity	Baselining		
Target	---		
Highest Reporting Level	---		

FIGURE 10.1. THE NEW KEY RESULT UI (PARTIAL SCREENSHOT).

#### 10.1.1 KR Basic Info Section

KR Basic Info	
Request Type	<b>New</b>
Accountable Org	---
Focus Area	---
CO+I Objective	---
Team Objective (optional)	---
KR Name	* ---
Metric Name	---
Fiscal Year	---
Target Maturity	<b>Baselining</b>
Target	---
Highest Reporting Level	---

FIGURE 10.1.1. THE KR BASIC INFO SECTION OF THE NEW KEY RESULT UI (PARTIAL SCREENSHOT).

**10.1.1.1 Request Type**

**10.1.1.2 Accountable Org**

**10.1.1.3 Focus Area**

**10.1.1.4 CO+I Objective**

**10.1.1.5 Team Objective**

**10.1.1.6 KR Name**

**10.1.1.7 Metric Name**

**10.1.1.8 Fiscal Year**

**10.1.1.9 Target Maturity**

**10.1.1.10 Target**

**10.1.1.11 Highest Reporting Level**

**10.1.1.12 KR Description**

**10.1.2 Optional Section**

Optional

Report Link ---

---

App/Database Name ---

---

FIGURE 10.1.2. THE OPTIONAL SECTION OF THE NEW KEY RESULT UI.

### 10.1.2.1 Report Link

### 10.1.2.2 App/Database Name

## 10.1.3 People Section

People

KR Owner Alias ---

---

KR Champ Alias ---

---

BI Contact Alias ---

---

KR Data Quality POC  
Alias ---

---

FIGURE 10.1.3. THE PEOPLE SECTION OF THE NEW KEY RESULT UI.

### 10.1.3.1 KR Owner Alias

### 10.1.3.2 KR Champ Alias

### 10.1.3.3 BI Contact Alias

### 10.1.3.4 KR Data Quality POC Alias

## 10.1.4 Additional People Section

Definition	Used to identify any additional personnel who are associated with the KR after the draft is saved
Field type	Related table
Field location	OKR Intake Main form > Business Input tab
NOTE: This section of the UI becomes active only after the draft is saved.	

## 10.2 Power BI Dashboards



**New Power BI Reports**

**General**

**General Info**

Report Name *	---
Prod Link	---
Prod Embed Link	---
PPE Link	---
Create a Bug Link	---
Create a Feature Link	---
Is OKR Dashboard	<b>No</b>

List the KR's on this Dashboard

**People**

BI Team Owner Alias	---
Requirement Owner	---
Security Group	---

FIGURE 10.2. THE NEW POWER BI REPORTS UI.

### 10.2.1 General Info Section

**General Info**

Report Name *	<input style="width: 100%;" type="text" value="---"/>
Prod Link	---
Prod Embed Link	---
PPE Link	---
Create a Bug Link	---
Create a Feature Link	---
Is OKR Dashboard	<b>No</b>

FIGURE 10.2.1. THE GENERAL INFO SECTION OF THE NEW POWER BI REPORTS UI.

### 10.2.1.1 Report Name\*

Definition	Used to specify the name of the Power BI report.
Field type	Text input field
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports
NOTE:	

### 10.2.1.2 Prod Link

Definition	Used to specify the URL of the production link
Field type	Text input field
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports
NOTE:	

### 10.2.1.3 Prod Embed Link

Definition	Used to specify the URL of the embedded production link.
Field type	Text input field
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports
NOTE:	

### 10.2.1.4 PPE Link

Definition	Used to specify the URL of the PPE link.
Field type	Text input field
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports
NOTE:	

### 10.2.1.5 Create a Bug Link

Definition	Used to specify the URL of the bug.
Field type	Text input field
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports
NOTE:	

### 10.2.1.6 Create a Feature Link

Definition	Used to specify the URL for the feature link.
Field type	Text input field
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports
NOTE:	

### 10.2.1.7 Is OKR Dashboard

Definition	Used to specify whether or not the OKR assigned to a Dashboard
Field type	Dropdown selection field
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports
NOTE:	

## 10.2.2 People Section

The screenshot shows a section titled 'People' with three rows of dropdown menus. The first row is 'BI Team Owner Alias' with a three-dot menu icon. The second row is 'Requirement Owner' with a three-dot menu icon. The third row is 'Security Group' with a three-dot menu icon. Each row is separated by a horizontal line.

FIGURE 10.2.2. THE PEOPLE SECTION OF THE NEW POWER BI REPORTS UI.

### 10.2.2.1 BI Team Owner Alias

Definition	Used to identify the person on the BI Team who is working on the OKR Dashboard for the KR
Field type	Email address input field
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports
NOTE:	

### 10.2.2.2 Requirement Owner

Definition	Used to identify the person who is the requirement owner.
Field type	Email address input field
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports
NOTE:	

### 10.2.2.3 Security Group

Definition	Used to specify any Security Groups who will be granted access to the KR
Field type	Email address input field (Group email alias)
Field location	OKR Intake Main form > Power BI Dashboards > New Power BI Reports

NOTE:

## 10.2.3 List the KR's on this Dashboard

## 10.3 Data Source

### 10.3.1 General Info Section

### 10.3.2 Optional Info Section

### 10.3.3 People Section

### 10.3.4 Linked Key Results Section

## 10.4 Initiatives

### 10.4.1 External Links Info Section

### 10.4.2 People Section

### 10.4.3 Limited Key Results Section

## 10.5 Additional Table Tabs

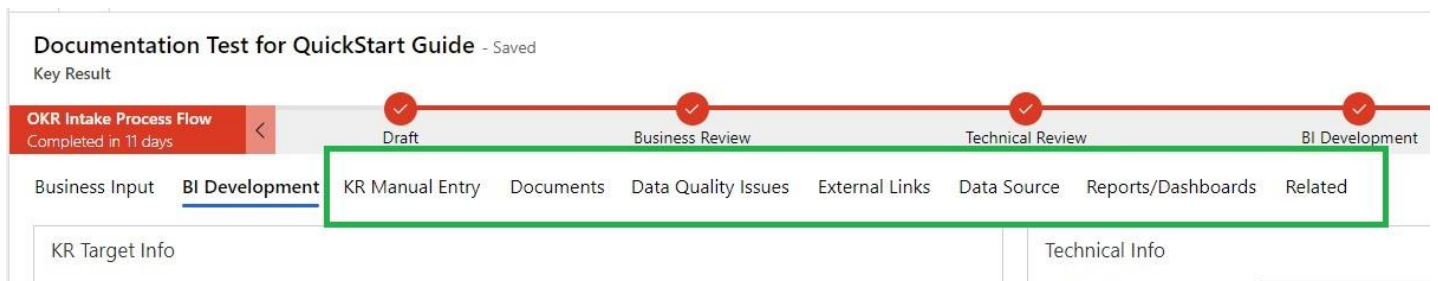


FIGURE 10.5.1. UI TABS IN THE OKR INTAKE TOOL UI.

10.5.1 The OKR Intake Tool provides for adding several types of additional information at any point during the Process Flow. The following Additional Tables provide the interface for adding:

- KR Manual Entry
- Documents
- Data Quality Issues
- External Links
- Data Source
- Reports Dashboards
- Related information

10.5.2 Adding information using the tabs above is done by clicking the tab name to open the desired tab. For this example the KR Manual Entry tab is used.

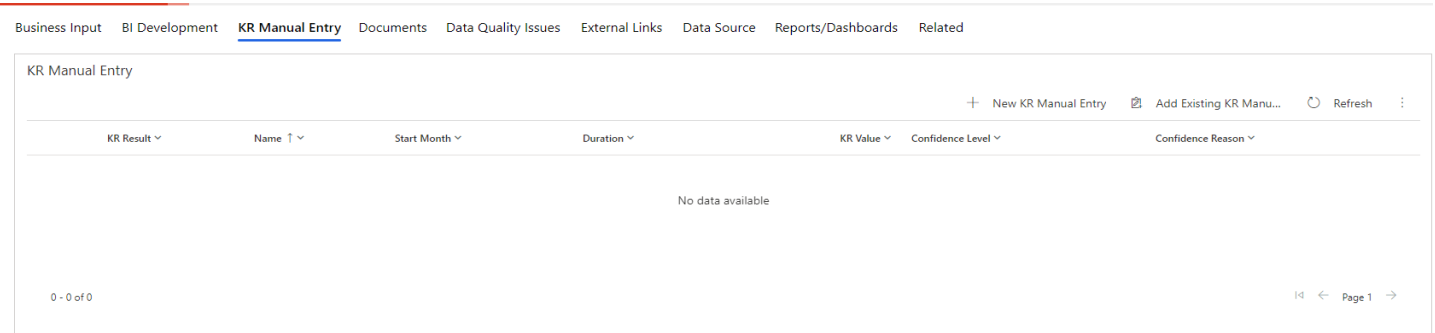


FIGURE 10.5.2. THE KR MANUAL ENTRY TAB OPENED IN THE OKR INTAKE TOOL.

10.5.3 Click the **+ New [tab name] button** in the desired tab to add the information to the OKR Additional Tables tabs above.

*NOTE: For this example the New KR Manual Entry dialog box options are used, but all UI Tabs have the + New [tab name] button and are completed using the same basic process.*

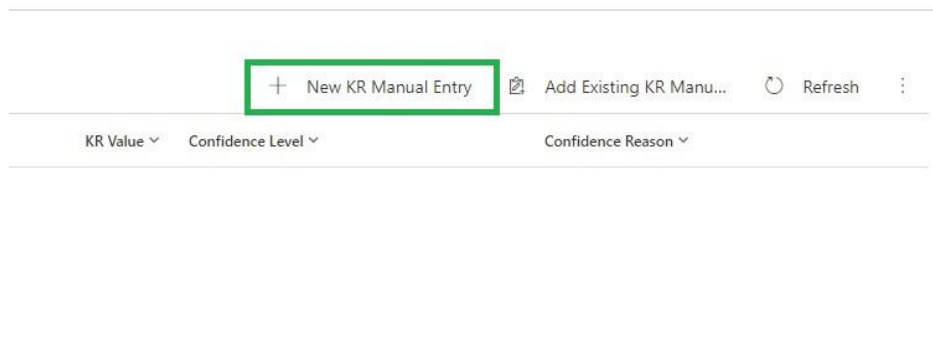


FIGURE 10.5.3. THE + NEW KR MANUAL ENTRY BUTTON IN THE KR MANUAL ENTRY TAB.

10.5.4 Once the + New [tab name] button is clicked a new dialog box will appear.

**New KR Manual Entry**

General

Key Result Documentation Test for QuickStart Guide

Start Month ---

Duration Monthly

KR Value ---

Confidence Level **Confident**

Confidence Reason Enter text...

Font Size B I U

FIGURE 10.5.4. THE NEW KR MANUAL ENTRY DIALOG BOX.

10.5.5 Provide [the requested information] in the displayed fields.

*NOTE: The Field types are the same as those described in the Controls section above.*

10.5.6 Click **Save** in the menu bar at the top of the UI to add the information to the KR.

## 11 Appendix

### 11.1 Glossary

Term/Acronym	Definition
ADO	<b>A</b> zure <b>D</b> evelopment <b>O</b> perations
Alias	Microsoft email address
Ally.io	OKR Management software package
API	<b>A</b> pplication <b>P</b> rogram <b>I</b> nterface
CO+I	<b>C</b> loud <b>O</b> perations + <b>I</b> nnovation
DCS-BI	<b>D</b> ata <b>C</b> enter <b>S</b> ervices- <b>B</b> usiness <b>I</b> ntelligence. AKA DCSBI
FY	<b>F</b> iscal <b>Y</b> ear

High Pri	<b>High Priority</b>
MAC	<b>M</b> ove <b>A</b> dd <b>C</b> hange
Max Hours	This is the estimated maximum (Max) hours it would take to complete a Work Item end to end. The dedicated time could span multiple business days. This is the time spent on the Work Item itself.
Min Hours	This is the estimated minimum (Min) hours it would take to complete a Work Item end to end. The dedicated time could span multiple business days. This is the time spent on the Work Item itself.
OKR	<b>O</b> bjective [and] <b>K</b> ey <b>R</b> esult
PM Hours	<b>P</b> roject <b>M</b> anagement Hours- The number of hours that a Project Manager will be dedicated to managing a single Work Item. This work consists of gathering requirements, scheduling meetings, removing blocking items, and organizing deployment. The dedicated time could span multiple business days. This is the time spent on the Work Item itself. Overhead Ratio has been locked at 28% of the Development Time in line with common industry standards. See Min Hours [and] Max Hours
POC	<b>P</b> oint <b>O</b> f <b>C</b> ontact
PPE	<b>P</b> re- <b>P</b> roduction <b>E</b> ngineering
Prod	<b>P</b> roduction
QSG	<b>Q</b> uick <b>S</b> tart <b>G</b> uide
SLA	<b>S</b> ervice <b>L</b> evel <b>A</b> greement
UAT	<b>U</b> ser <b>A</b> cceptance <b>T</b> esting
UG	<b>U</b> ser <b>G</b> uide