# OKR Dashboard
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## Business Requirement

- Dashboard allows the user to have an overview of the company objectives, team objectives and individual objectives.
- Allows the user to get insights on objectives that require their attention and lets them take action on it.
- Allows user to get a high level picture of the status and details of objectives that they are owners of.

***By roles,***

- It helps the top level management or people who have the access to create company objectives to have an overall look and details of how the company or departments are performing in order to achieve their targets.
- Managers can have insights of their team objectives and individual objectives of their team members.

## New feature addition

**Period:**

When user clicks on the period drop down list box, a calendar should be displayed where the user can choose the time period (From and to). On clicking **Apply,** the dashboard should be set to display details of objectives falling within this applied time period.
For example, if the user chooses 01-03-2023 to 02-04-2023 as the period, all the segments in the dashboard should display details of objectives that have their starting date within this period.

*Note:By default, the current financial year will be displayed.*

**Company Overview:**

- ✓ **Overall Progress:** Average percentage completion of all objectives.
- ✓ **Total no. of OKRs:** Should display the total number of objectives created in the organization. This should be a clickable widget where clicking on 'View details' should open a pop-out with the list of all objectives with details such as objective name, owner, due date, status and completion percentage. The pop-out should have a search bar, sort by, filter and export button.

  - The pop out should have **search bar** for users to search the objectives. User should be allowed to enter any word or sentence that match the objectives and once the search icon is clicked, the list of objectives containing the searched word or sentence should be listed. [Same functionality as is the live product on Teams objectives page]
  - Clicking on the **export icon** should enable the system to send the exported report to the user's email id.

- Clicking on **filter icon** should display a pop-out with the following fields on the left pane - Objective type, status, due date, objective details, organization unit.

1. Objective type:

**a)** When user clicks on this section, it should display a drop down list on the right pane with these options: All, company objective, team objectives, individual objectives.
**b)** Two check boxes to choose **Show aligned objectives** and **Show unaligned objectives.**

Choosing any of the types from the drop down should filter the list based on the selected objective type. *[For example:* If the user chooses type as **Team objectives** from the drop down and **Show unaligned objectives** from the check box. The list should be filtered to show all the unaligned team objectives.]

2. **Status, due date, objective details, organization unit** - These are of same functionality of the existing filters from our already existing filter pop out. (Same functionality as is the live product on Teams objectives page)

- When user click the **sort by** drop down, these options should be listed: Owner Name, status, due date, % of completion. (Same functionality as is the live product on Teams objectives page)

The pop-out should display 5 objectives by default and added with more pages to view more objectives.
The objectives listed should have these details: Objective name, type, OKR Owner, due date, status, progress % bar and last updated date. [as is the objective listing pages]

**Number of aligned objectives:** Displays the count of all aligned objectives. This should be a clickable widget where clicking on **'View details'** should open a pop-out with the list of all aligned objectives showing details such as objective name, owner, due date, status and completion percentage.

The pop-out functionality is same as the above mentioned, except that in the Objectives type, **Show aligned objectives** should be auto-checked/ selected and **Show unaligned objectives** check box option should be disabled.

**Number of unaligned objectives:** Displays the number count of all unaligned objectives. This should be a clickable widget where clicking on **'View details'** should open a pop-out with the list of all unaligned objectives showing details such as objective name, owner, due date, status and completion percentage.

The pop-out functionality is same as the above mentioned, except that in the Objectives type, **Show unaligned objectives** should be auto-checked/ selected and **Show aligned objectives** check box option should be disabled.

**OKR Status- Pie Chart (Default - Company)**

The status diagram of company objectives should be shown by default.
There should be a drop down where the list should have team objectives and individual objectives. Clicking on any of them should show the chart representation of their objectives' statuses.

## 1. Company Objectives - Pie chart

For company objectives, the chart should display the following status keys representing the status colors : **Completed, Closed, not started, In progress, dropped.**

When the user hovers over any of these status segments on the pie chart, it should display their respective status and their percentiles. Each status segment should also be clickable, which when clicked should show a pop out that lists the objectives related to that status with details such as **objective name, type, OKR owner, due date, status, last updated on.**
These objectives should be clickable where, when user clicks on the title of the objectives, it should take them to its respective **OKR detail page**.
Filter: In the Objectives type section, the drop down should be disabled as we already using this filer on company objectives. Only the check box fields- **Show unaligned objectives** and **Show aligned objectives** should be enabled.
When any one of them are checked, the list should be filtered to show only the chosen objectives:
There should be option to export this list in this pop out and clicking on the export icon should trigger this report as mail to the users mail id.

(Functionality same as is any export we do in the product)

**For Team objective and Individual objectives:** Pie chart should show the count of team and individual objectives according to their status as found below.

**Team objectives**: No. of team objectives **completed, in progress, awaiting review, not started, rejected, closed, awaiting approval.**

**Individual objectives**: No. of individual objectives **completed, in progress, awaiting review, not started, rejected, closed, awaiting approval.**

(The same functionality of company objectives pie chart applies to Teams and Individual objectives)

**For your attention:**

This section consists of widgets that needs the users attention to take action on, like the following: **Due today, Pending approval, Over due, Awaiting review.**
The widgets should have **View details** when it contains objectives.

**Due today:** Widget to display the number of objective's that have due date as the present day of login for the user. This should be a clickable widget which when clicked by users, a pop-out should display the list of the objectives that have their due date as that particular day with the following details: **objective name, completion progress percentage, due date, status and owner.**

**Pending approvals:** Widget to display the total number of OKRs waiting for user's approval and sent for approval to the user's reporting manager or aligned objective's owner (OKRs sent by user for approval + awaiting the users approvals that are sent by other employees).

Clicking on **View Details** this widget should display these objective's details in a pop-out.

Two types of list should be shown:

1. **Awaiting your approval-** List of objectives of employees that requires the users approval.
2. **Sent for approval-** List of objectives of the user that they have sent for approval to someone else (Manager/ Aligned objective owner).

For OKR awaiting the users approval, Clicking on the listed OKR should take the user to the **OKR approve/ reject objective** page of that OKR.

Clicking on the OKRs that are sent to someone else for approval, user should be taken to their **OKR details page.**

**For example:** If the user is a team manager, they would receive objectives for their approval from their team members and they would also send their objectives to their reporting manager. In which case, both these types of approvals will be listed under **Awaiting your approval** and **Sent for approval** section respectively.

**Overdue:** Objectives that have crossed the due date and not been completed are displayed. Clicking on this widget should display these objective's details list.
When user clicks on any of the objective it should take them to the **OKR details page.**

**Awaiting Review:** Widget to display the total number of OKRs waiting for user's review and sent for review to the user's reporting manager or aligned objective's owner ( OKRs sent by user for review + awaiting the users review that are sent by other employees).

Clicking on **View Details** this widget should display these objective's details in a pop-out.

Two types of list should be shown:

1. **Awaiting your review-** List of Objectivess of employees that requires the users review.
2. **Sent for review-** List of Objectives of the user that they have sent for review to someone else (Manager/ Aligned objective owner).

(Note: Similar to approval functionality)

For OKR awaiting the users review, Clicking on the listed OKR should take the user to the **OKR approve/ reject objective** page of that OKR.

Clicking on the OKRs that are sent to someone else for review, user should be taken to their OKR details page.

**My Insights:**

This section is to display the objectives of various progress status. Objectives should be segregated by their progress status in separate widgets.
User should be able to look at the objectives of different progress status by organizational unit. i.e., filtering objectives by organizational unit. Clicking on the OU filter should show a pop-out displaying the list of OUs that can be selected.
Once the OU is chosen, the objectives that are created in those OUs should be displayed according to their progress status.
Introducing a presentation functionality where, clicking on the presentation icon should expand screen from **my insights** section to the end of the screen.

**The following widgets should be displayed:**

- Total Objectives
- Leading
- On-track
- Lagging

Each of the widget is view-able unless it displays ‘0’.
When the widget contains objectives and displays its count, **View Details-** clickable field should be displayed inside the widget. When user clicks on **View Details,** a pop out should be displayed containing the list of the respective objectives according to the Progress status.
The pop-out is same as mentioned previously except for the **Sort by** and **Filter** section, where the status option should be removed from these two sections.
When the user clicks on the objectives in pop-out, they should be taken to OKR details page.

**Growth Chart:**

**Filter:** Two options are given to the user to pick from:
>**Department wise Team Objectives**
>**Department wise Individual Objectives.**

The Graph should have the **progress %** scale on its **Y-axis** and the **departments** on the **X-axis.**

> When **Department wise Team objectives** is selected, the progress bars on the graph should indicate the all the team objective’s progress percentage with respecct to each each department.
The fields and entities in the pop-out are same as mentioned earlier in this document, expect that the Objectives type section where in the **Please select** drop field,**Team objectives** should be pre-selected and should stay constant, while other options should be disabled.

> Like wise, when **Department wise Individual Objectives** is selected, the system should generate and showcase the total progress percentage of all individual objectives in every department. Clicking on each bars should open a pop-out that displays the list of the respective individual objectives in each department.
The fields and entities in the pop-out are same as mentioned earlier in this document, expect that the Objectives type section where in the **Please select** drop field, **individual objectives** should be pre-selected and should stay constant, while other options should be disabled.

User can **sort** their team/ individual OKR from each department using the **sort by** option ad choosing OKR owner name, due date, objective’s status and completion percentage. (Same as the existing functionality in the product).

**Export** icon should be present to export the list of the objectives displayed. ( same functionality as is existing product).

**Search** bar should be displayed to allow the user to search for the objective ( same functionality as is existing product).

**My Objectives:**

This section has 4 segments categorized into **All, Company objective, Team Objective** and **Individual objective.**

- ✧ **All Objectives-** Should display objectives of all types such as company, team and individual objectives that the user is the owner.

- ✧ **Company objective-** Should display only the company objectives created by the user who has privilege to create company objectives. This section should not be displayed for users other than the privileged ones ( Top management who has access to create company objectives)

- ✧ **Team objectives-** Should displays only the team objectives created by the users with Team objective creation privilege. If no objective is found in any of this segment, an information message should be displayed by default **- " No objectives found'**

- ✧ **Individual Objectives-** Should display only the individual objectives that are created by the user and assigned to the user by others. If no objective is found in any of this segment, an information message should be displayed by default **- " No objectives found'.**

**Objectives in the above segments should be displayed with functionality as below:**

Objectives of the user are displayed in widget with key results, its progress percentage and objective's progress percentage in a pie chart.

- ✧ The name of the objective should be clickable and when clicked should take the user to tbe OKR details page of that objective.
- ✧ Widget should have a three dot icon, clicking on which a dropdown should be displayed with 3 options**- View, Edit** and **Update.**

    - ■ When user clicks on **View** and **Update**, the page should be redirected to OKR details page of that particular objective.
    - ■ Clicking on the **Edit**, user should be taken to the Edit Objective page of that particular objective.

*[Note: All the objectives will be accessible based on their privileges set at configurations. For example: Any user will be able to view company objectives but only the privileged user (CEO or similar) will be able to take action on it once they navigate to their respective OKR details page.]*