

Employee Ratings for Jira Cloud - Getting Started

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About

The Employee Ratings for Jira Cloud app is a solution which neatly integrates into your workflows. You can quickly assess the speed, quality, and efficiency of your colleagues that were working on this or that task.

Assess

- quality of completed tasks
- speed of doing a specific tasks
- skills of the employee for the current position

Review

- get objective assessment of employees' performance
- view the aggregated ratings for each metric
- discuss assessment with employees

Improve

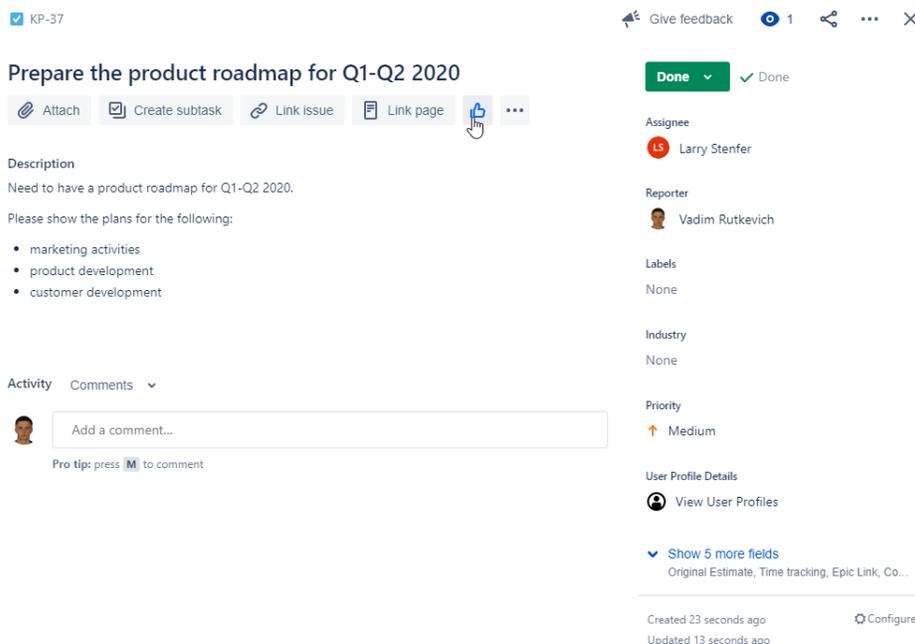
- get insights on problems in team performance
- help employees understand what to improve
- find the ways to improve skills and performance

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Assessing Work (new issue view)

 You can assess tasks that are completed or closed with the Done resolution.

1. Open the task which you are a reporter in.



The screenshot shows a Jira issue titled "Prepare the product roadmap for Q1-Q2 2020" with a status of "Done". The issue is assigned to Larry Stenfer and reported by Vadim Rutkevich. The description states: "Need to have a product roadmap for Q1-Q2 2020. Please show the plans for the following:" followed by a bulleted list: "marketing activities", "product development", and "customer development". The priority is set to "Medium". The interface includes a top bar with "Give feedback", "1" comment, and action icons. A right sidebar shows the issue's metadata. At the bottom, there is a comment input field and a "Pro tip: press M to comment" message.

2. Click the **Rate** button. The Rate section appears.

KP-37

Prepare the product roadmap for Q1-Q2 2020

Attach Create subtask Link issue Link page Like ...

Description
Need to have a product roadmap for Q1-Q2 2020.
Please show the plans for the following:

- marketing activities
- product development
- customer development

Rate
You are assessing work of **Larry Stenfer**

Work Quality: 9

Speed: 8

Skills / Efficiency: 9

Save ?

3. Set the ratings for each metric.
4. Click **Save**.

Give feedback 1

Done Done

Assignee
Larry Stenfer

Reporter
Vadim Rutkevich

Labels
None

Industry
None

Priority
Medium

User Profile Details
View User Profiles

Show 5 more fields
Original Estimate, Time tracking, Epic Link, Co...

Created 2 minutes ago Configure
Updated 2 minutes ago

Assessing Work (old issue view)

1. Open the task which you are a reporter in.

KP-31

Prepare the product roadmap for Q1-Q2 2020

Edit Comment Assign Backlog Selected for Development Workflow Admin

Type: Task Status: DONE (View workflow)
Priority: Medium Resolution: Done
Labels: None

Description
Need to have a product roadmap for Q1-Q2 2020.
Please show the plans for the following:

- marketing activities
- product development
- customer development

Attachments
Drop files to attach, or browse.

Activity
All Comments Work log History Activity

There are no comments yet on this issue.
Comment

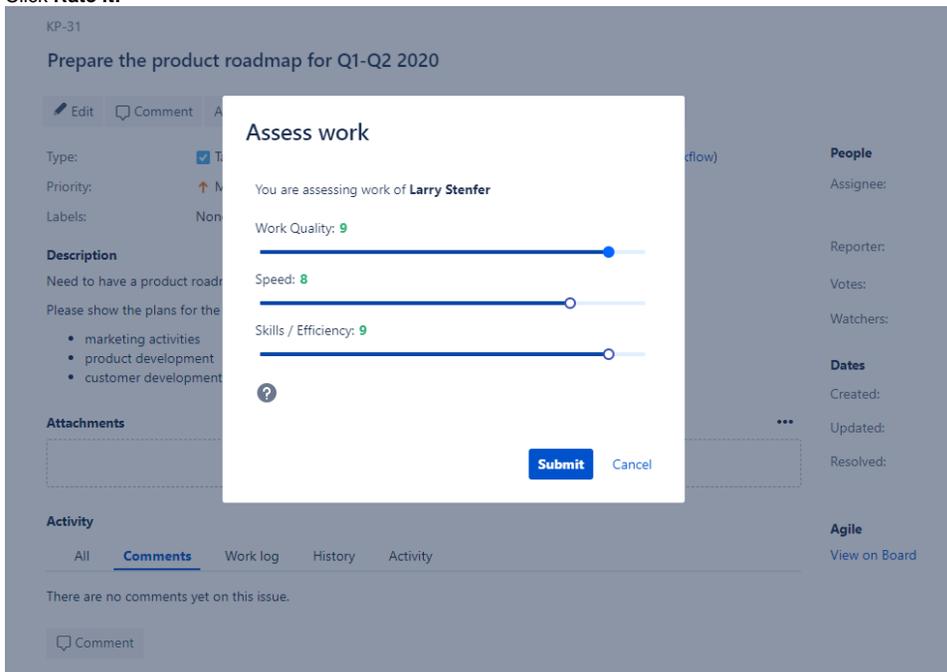
Rate It!

People
Assignee: Larry Stenfer
Assign to me
Reporter: Vadim Rutkevich
Votes: 0
Watchers: Stop watching this issue

Dates
Created: 13/Jan/20 10:41 AM
Updated: 30/Jan/20 12:19 PM
Resolved: 30/Jan/20 10:43 AM

Agile
View on Board

2. Click **Rate it!**

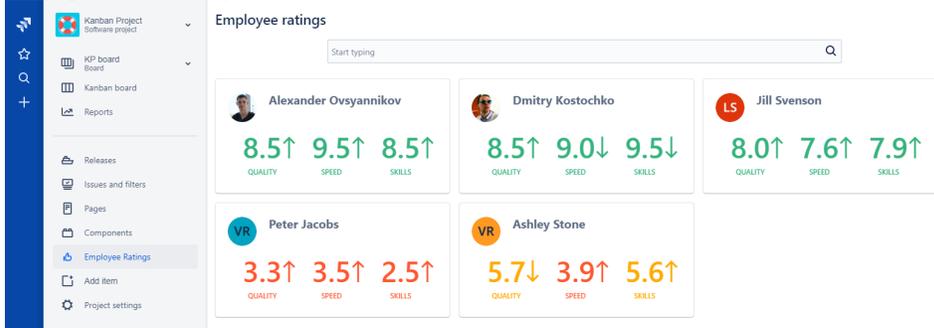


3. In the **Assess work** form, set the ratings for each metric.
4. Click **Submit**.

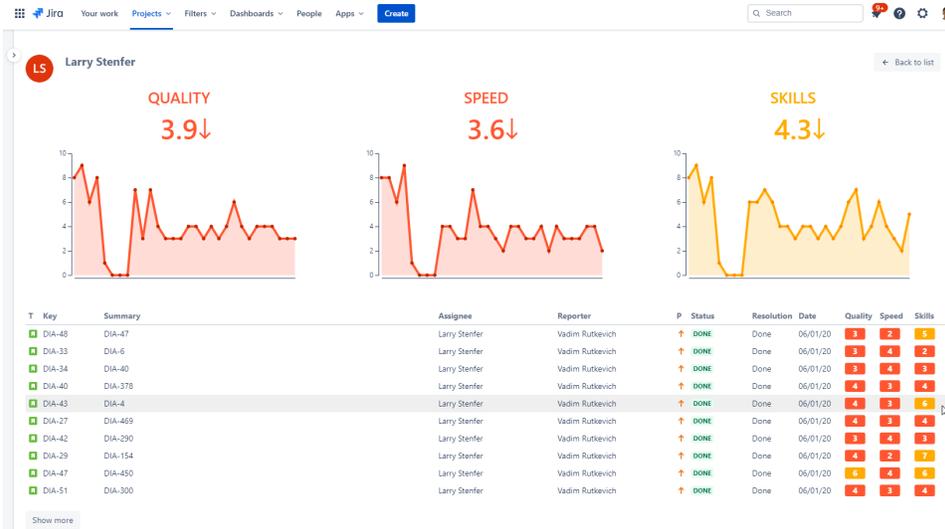
Viewing Metrics for Users

The app shows and calculates metrics per project.

1. Open the project in which you want to view metrics.
2. On the navigational sidebar, select **Employee Ratings**.
3. The page with the employees' performance metrics opens, as follows:



4. To view details on metrics, click the card of the specific user. The page with details opens, as follows:



The app calculates metrics over the last 180 days for users having ratings for two or more tasks. Metrics are shown per project.

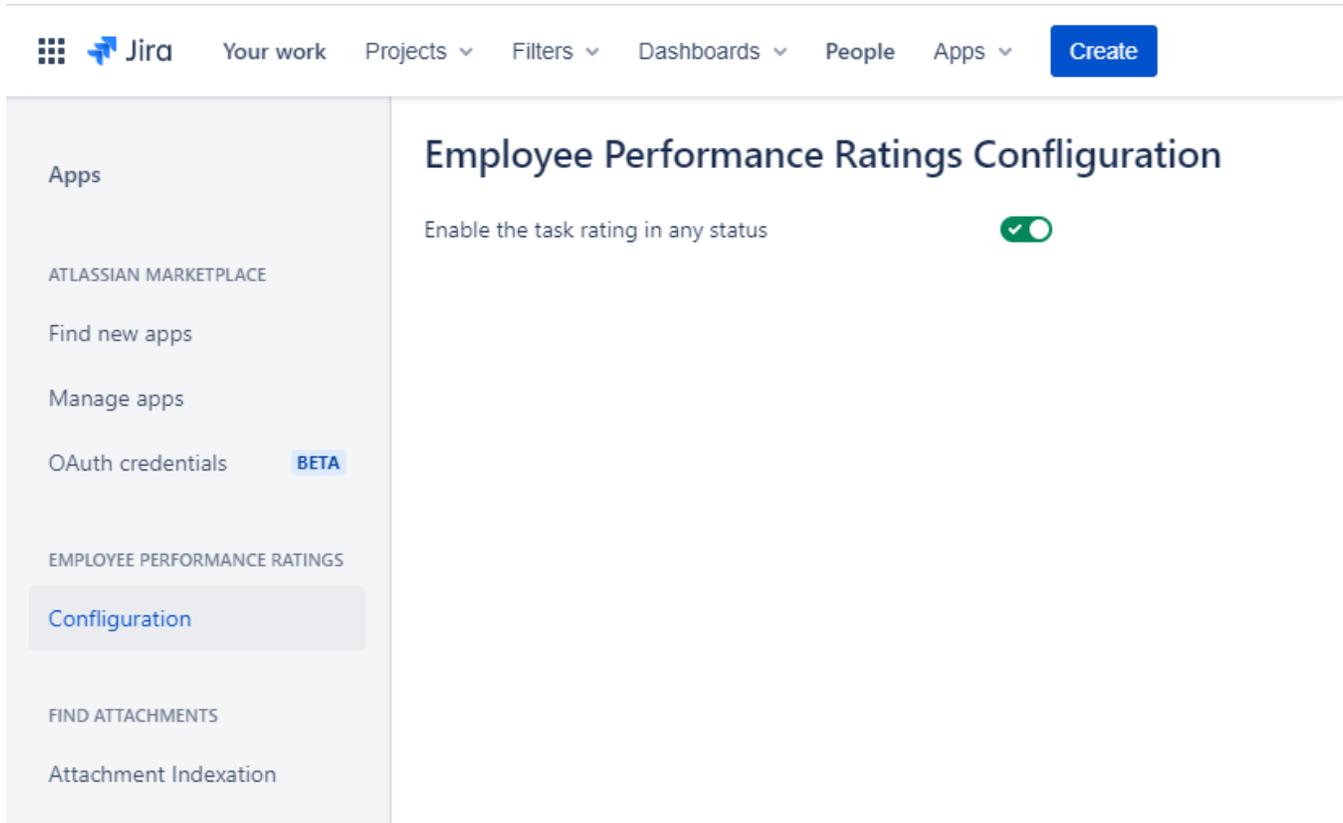
Integration with Customer Portal of Jira Service Desk

The Employee Performance Ratings app integrates with the customer portal of Jira Service Desk. This means that your customers can assess your customer support services and work of individual support agents.

Enabling the Rate assignee button for all statuses

1. Navigate to **Jira administration section > Apps**.
2. Locate the Employee Performance Ratings section, and select **Configuration**.

3. Move the toggle right.



The screenshot shows the Jira interface. At the top, there's a navigation bar with the Jira logo, 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', 'Apps', and a 'Create' button. Below this is a sidebar with 'Apps' and 'EMPLOYEE PERFORMANCE RATINGS' sections. Under 'EMPLOYEE PERFORMANCE RATINGS', 'Configuration' is highlighted. The main content area is titled 'Employee Performance Ratings Configuration' and contains a toggle switch for 'Enable the task rating in any status', which is currently turned on.

Enabling the task assessment by multiple users

You can allow multiple users to assess the same task. In this case, the app will calculate the average value for each metric on the basis of ratings from these people.

1. Navigate to **User Management**.
2. Create the user group and name it as 'task-evaluators'.
3. Add users within this user group.

All the users within this group will be able to assess tasks.

Exporting ratings data to CSV

You can export the ratings data for further evaluation. You need to create the **rating-reviewers** user group and add users into this group.

1. Open the project which ratings data you want to export.
2. Select **Employee Ratings**.
3. To the right side of the search bar, locate the  icon and click it.
4. In the **Download CSV** form, click the corresponding to download the raw or aggregated data.

Download CSV

Raw data [Download CSV file](#)

Average data [Download CSV file](#)

[Close](#)

Management of metrics sets

You can manage sets of metrics that you want to track within your Jira projects. This way you can vary the metrics that you want to track per project and depending on the project type.

1. Navigate to **Jira administration > Apps**.
2. On the sidebar, locate the **Employee Performance Ratings** section.
3. Select **Metrics**.

Once the page opens, you will see the list of metrics sets, as follows:

The screenshot shows the 'Employee Performance Ratings Configuration' page in Jira. The page has a sidebar on the left with navigation options like 'Apps', 'Find new apps', 'Manage apps', 'App requests', 'OAuth credentials', 'EMPLOYEE PERFORMANCE RATINGS', 'Configuration', 'Metrics', 'SMART ATTACHMENTS', 'Attachment Indexation', and 'Label Management'. The main content area displays a table of metrics sets with columns for Set name, Metrics, Associated Projects, Default, and Actions. There is an 'Add metric set' button in the top right corner.

| Set name | Metrics | Associated Projects | Default | Actions |
|-------------------------|-----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|-------------|
| Basic set | Work Speed Skills | SDE:SDE TR:Testing Reindexation GSDP:General Service Desk Project KP:Kanban Nextgen Project DIA:Data Inspection Analytics PWDI:Project with Deleted Tasks SD:SD KS:Kanban Standard SPT:Scrum Project Test ESDP:External Service Desk Project | <input checked="" type="checkbox"/> | Edit Delete |
| Technical Documentation | Design and layout Structure Consistency Mistakes and typos Document Quality | NPUP:Nextgen Project User Pickers KN:Kanban Nextgen SN:Scrum Nextgen TMP:Third Migration Project SP:Scrum Project | <input checked="" type="checkbox"/> | Edit Delete |
| Development | Code quality Development speed Bugs and issues Task accuracy | MP:Migration Project SMP:Second Migration Project TDP:Testing Default Project OSP:Old Scrum Project | <input checked="" type="checkbox"/> | Edit Delete |

You can perform the following operations on metrics sets:

1. create new metrics sets
2. edit the existing metrics sets
3. delete the no longer needed metrics sets

Creating a new metrics set

1. Open the list with metrics sets.
2. Click **Add metric set**.

3. On the opened page, enter the name of a new metrics set.

The screenshot shows the 'Employee Performance Ratings Configuration' page in Jira. The 'Metric Set Settings' section has a 'Set name' field with the value 'Support Service Metrics'. Below this is a table with three rows of metrics. The first row is 'Response Speed' with the description 'Metric which indicates how fast the support agent responded to the customer'. The second row is 'Quality' with the description 'Metric which indicates the quality of support'. The third row is 'Effectiveness' with an empty description. Each row has a 'Delete' button. There is an 'Add metric' button below the table. The 'Associated Projects' section shows a dropdown menu with 'Supporting Customers Project' selected and an 'Add projects' button. At the bottom are 'Save' and 'Cancel' buttons.

4. Click **Add metric** to create new metrics. Enter names for the added metrics and provide their description if needed.
5. Select projects which should use the metrics set.
6. Click **Add projects** to associate the metrics set with selected projects.
7. Click **Save** when complete.

Editing the metrics set

1. On the list with metrics sets, locate the one which you want to edit.
2. Click **Edit**.
3. Make the appropriate modifications in the metrics set.
4. Click **Save** when complete.



All modifications in the metrics set are saved when you click **Save**. If you need to discard modifications in the metrics set, click **Cancel**.

Please consider the following:

1. When you remove a metric from the metrics set, the collected data for this metric will be removed.
2. When you de-associate the metrics set from the project, all the collected data will be removed.

Deleting the metrics set

1. On the list with metrics sets, locate the one which you want to edit.
2. Click **Delete**.
3. In the confirmation form, select **I acknowledge these points**.
4. Click **Delete**.

All the collected data for the current metrics set will be deleted.

Setting the default metrics set

1. Open the list with metrics set.
2. Locate the one which you want to make as the default metrics set.
3. Move the toggle right.

The default metrics set will be automatically applied to the newly created projects.