Employee Ratings for Jira Cloud - Getting Started

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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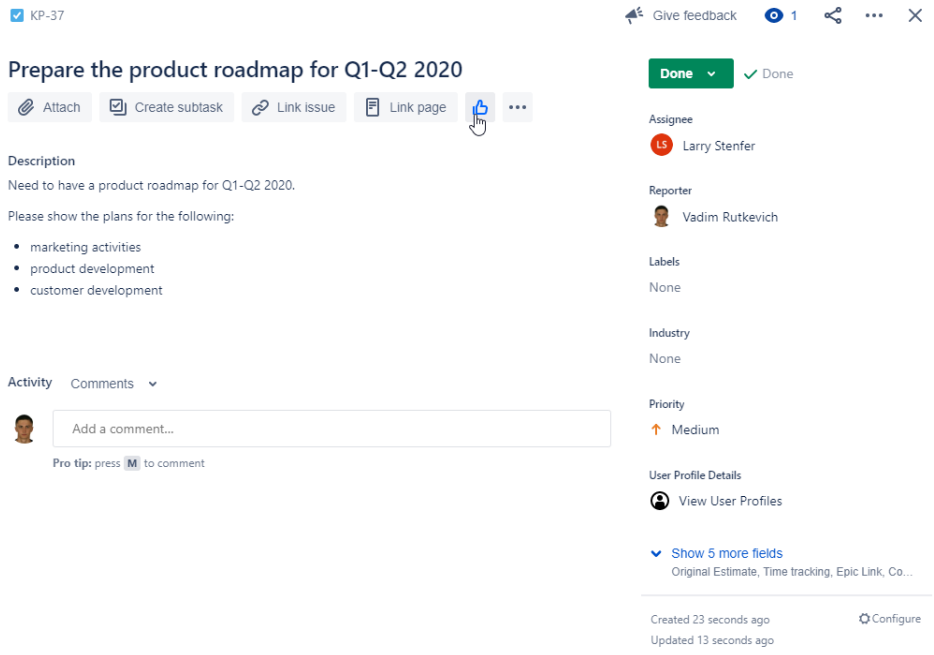
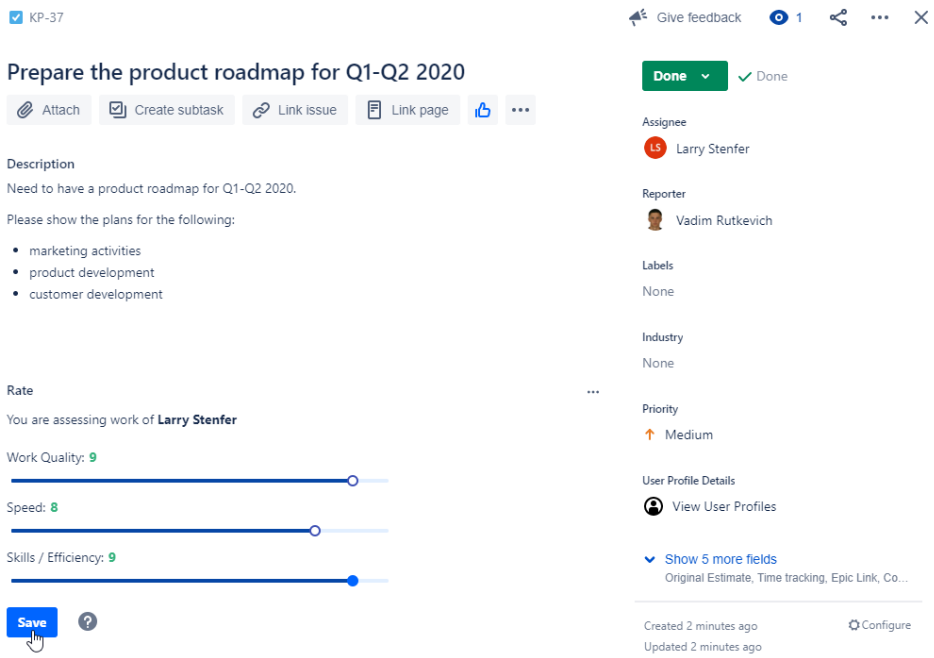
Assessing Work (new issue view)

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

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



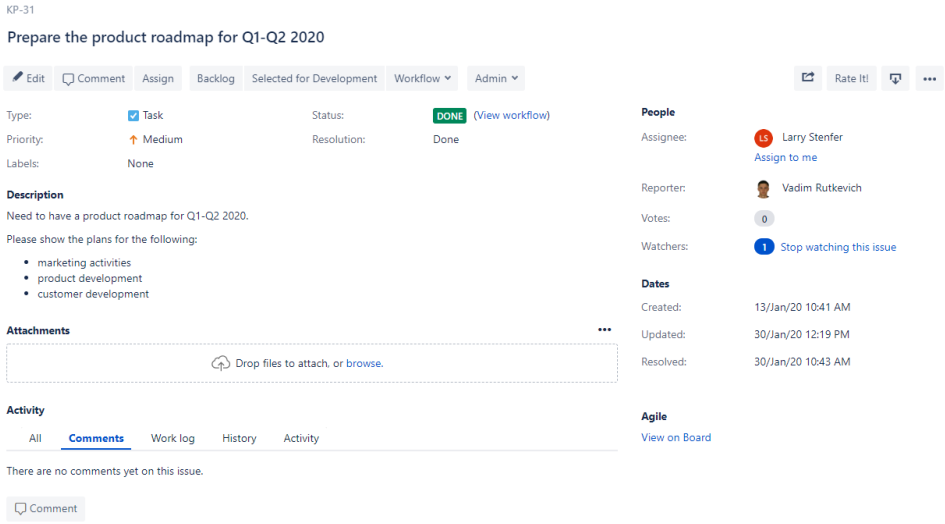
2. Click the **Rate** button. The Rate section appears.



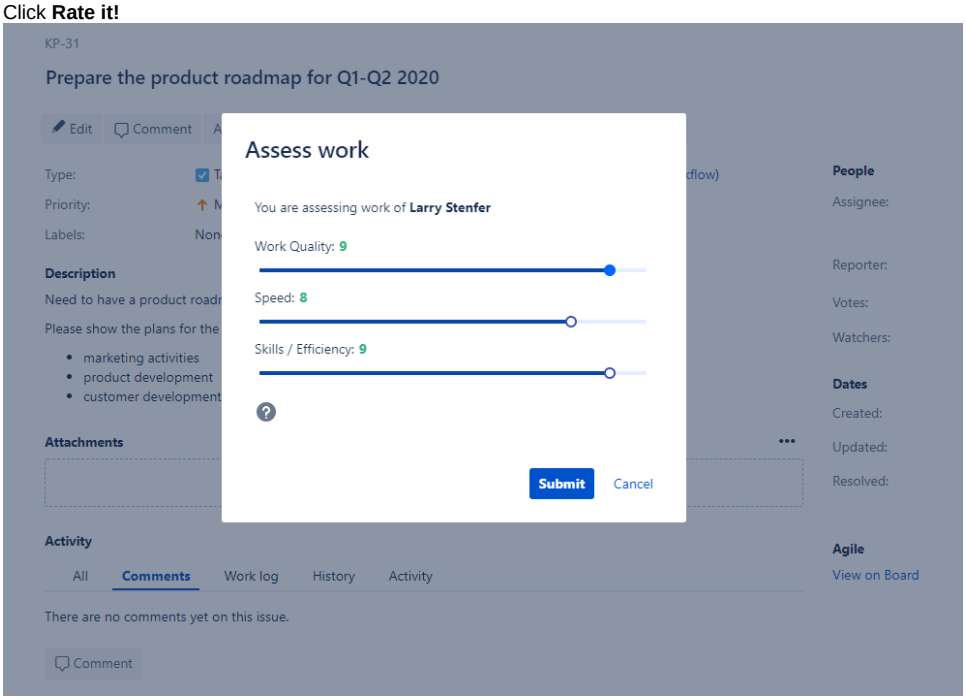
3. Set the ratings for each metric.
4. Click **Save**.

Assessing Work (old issue view)

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



2. Click **Rate it!**

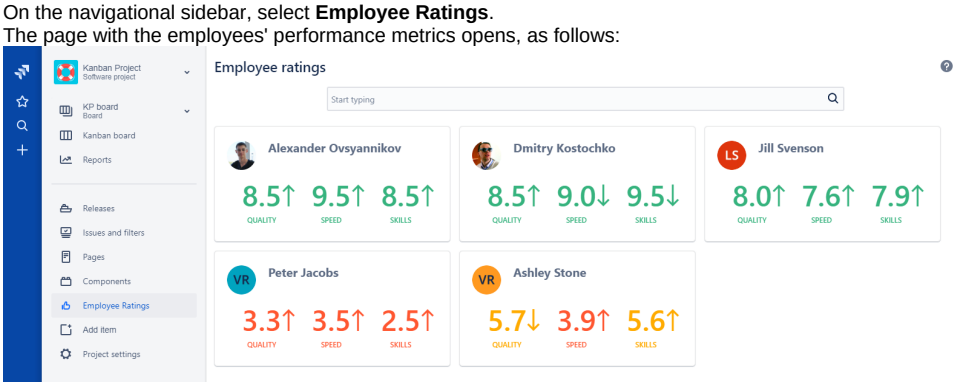


3. In the **Assess work** form, set the ratings for each metric.
4. Click **Submit**.

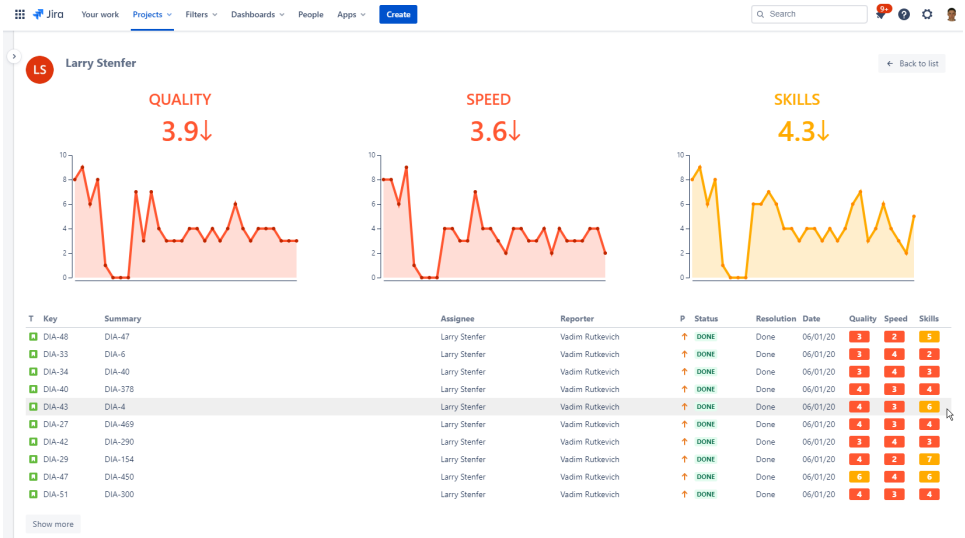
Viewing Metrics for Users

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:



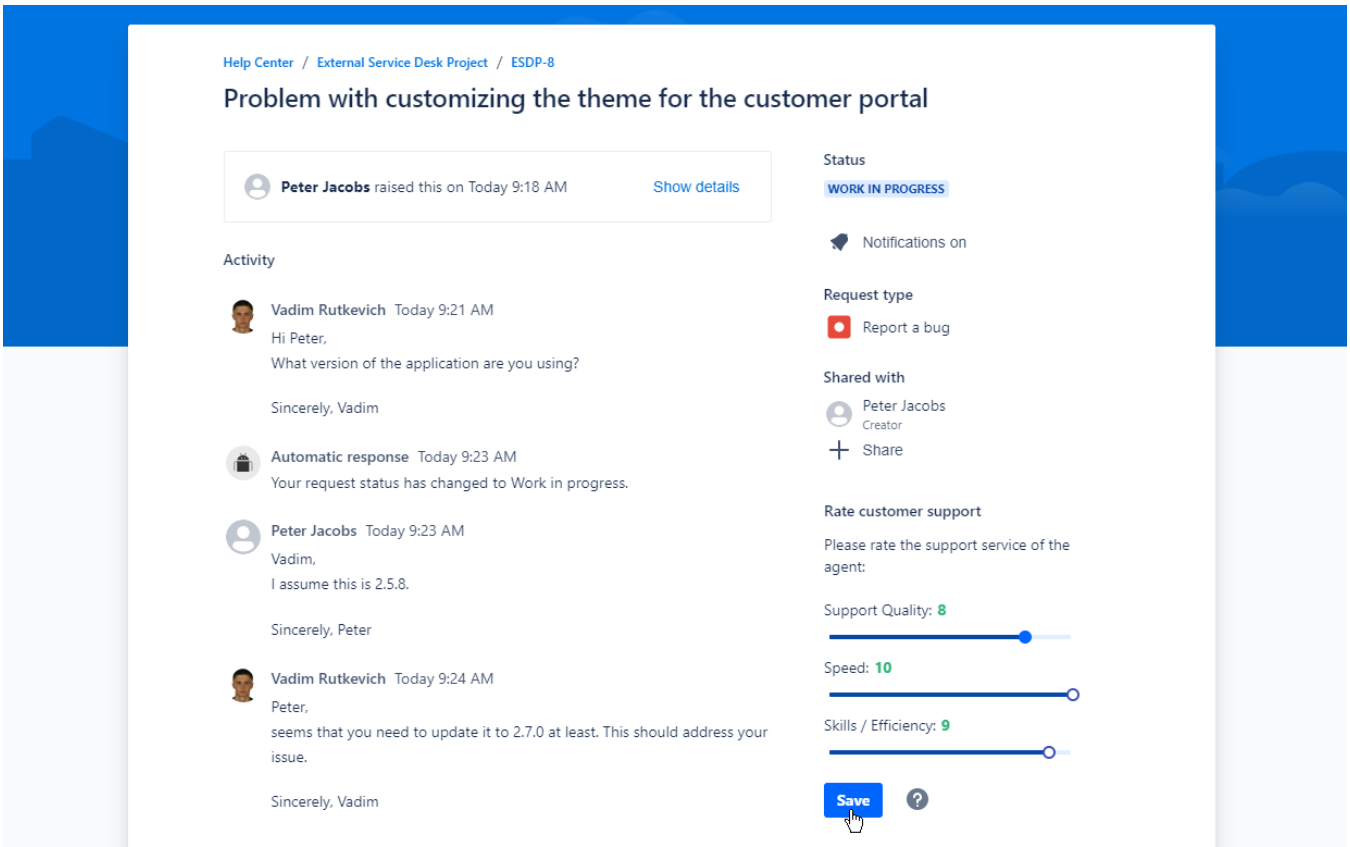
4. To view details on metrics, click the card of the specific user. The page with details opens, as follows:



> 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

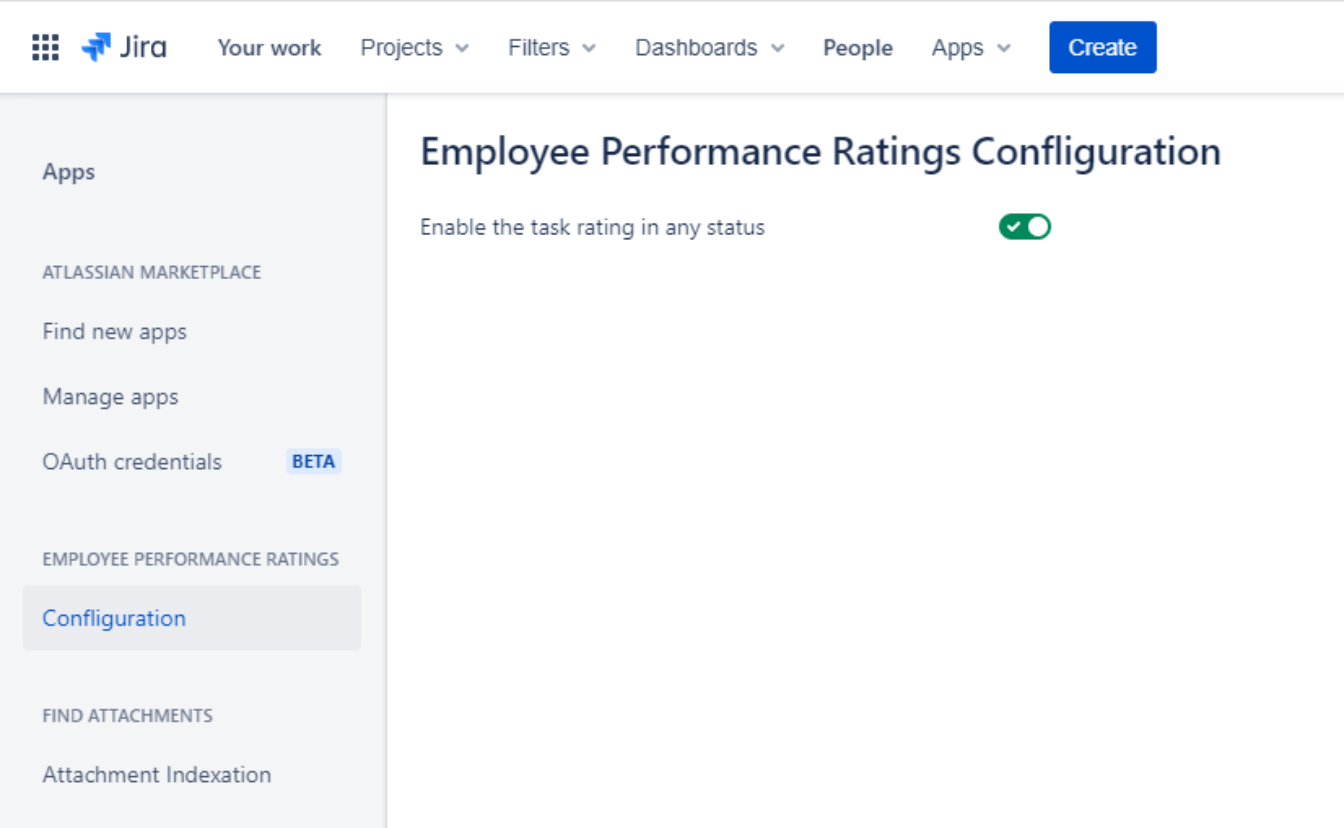
The Employee Performance Ratings app integrates with the customer portal of Jira Service Desk. This means that your customers can assess your customer support services and work of individual support agents.



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.



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.

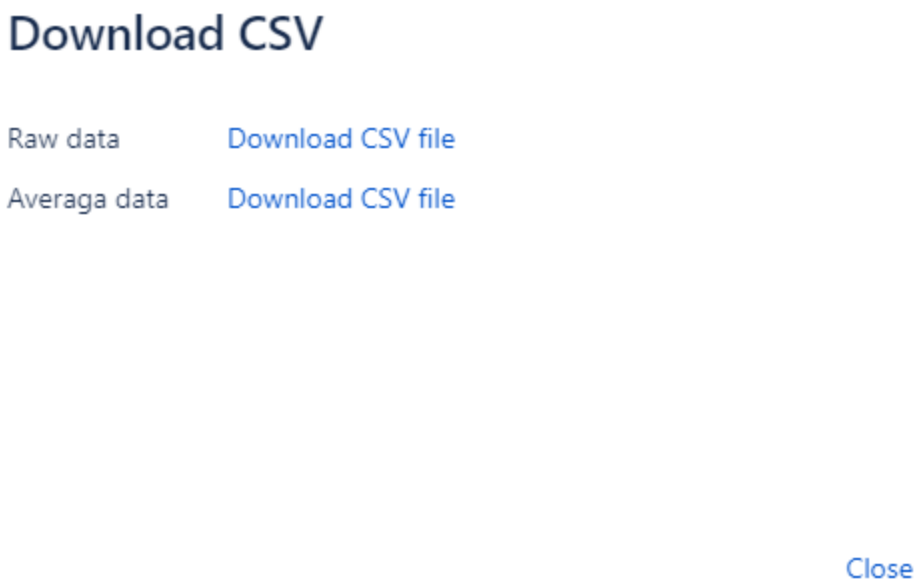
1. Navigate to **User Management**.
2. Create the user group and name it as 'task-evaluators'.
3. Add users within this user group.

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.

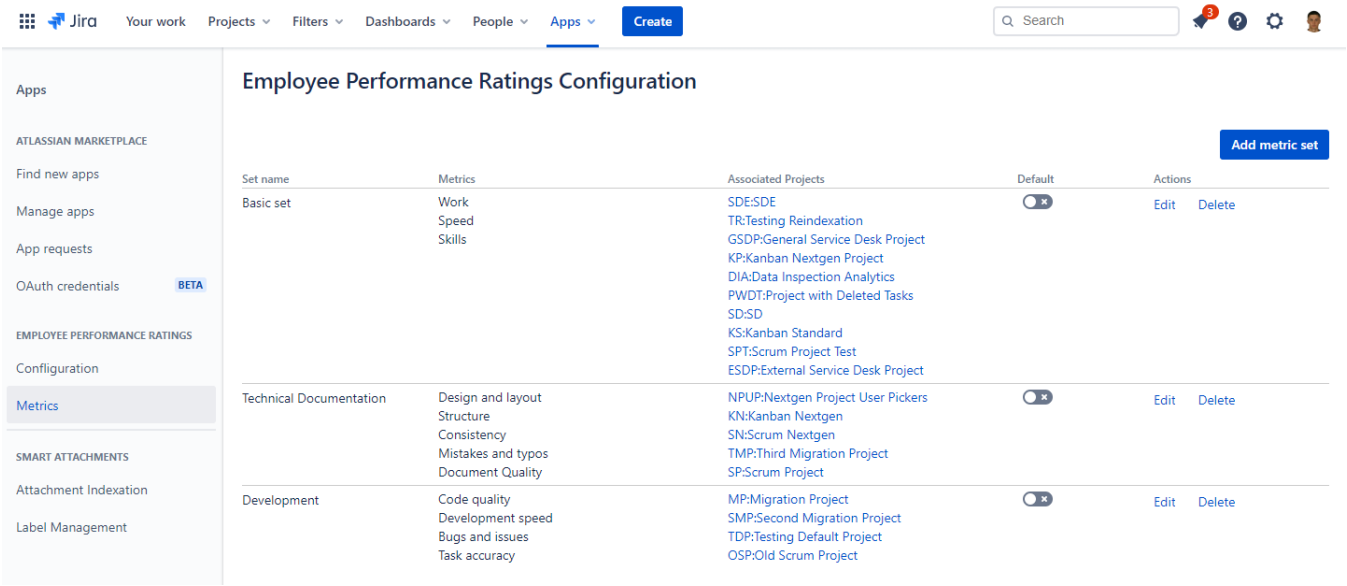


Management of metrics sets

You can manage sets of metrics that you want to track within your Jira projects. This way you can variate 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:



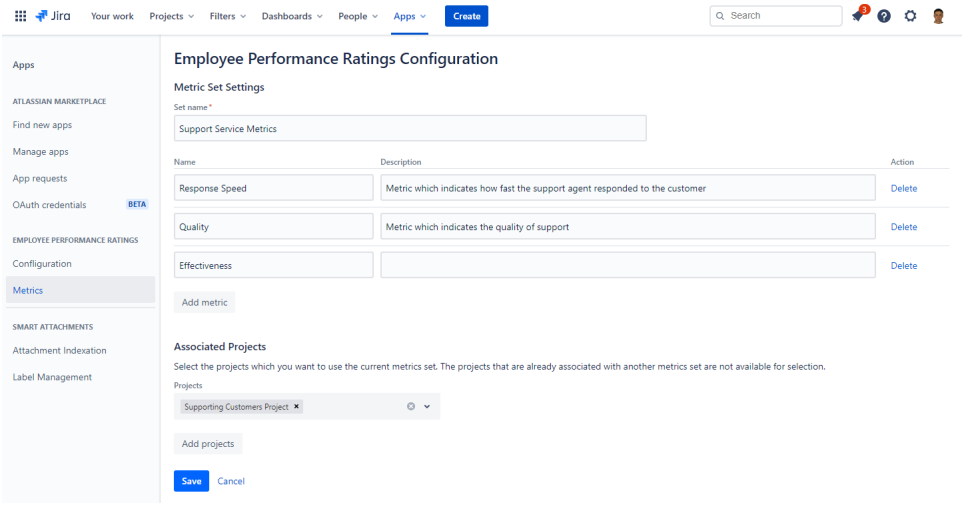
You can perform the following operations on metrics sets:

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.



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.