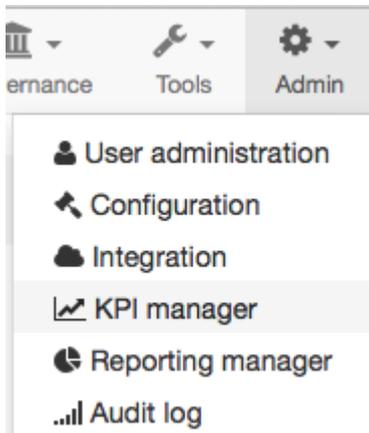


KPI Manager

→ To get access to the KPI Manager, the permission ADMIN_KPI_MANAGER_PERMISSION is required.

The administration of BizDock KPIs is available via the “Admin” menu.



The KPIs are displayed in BizDock either as a “cell” in the tables or as a “box” in the dashboards:

Risks & Issues	Allocated employees' days	Allocated org units' days
3	0	20
0	0	0
1	0	0
0	0	0

 OPEN REQUIREMENTS

6

TOTAL 8 CLOSED 2

  Trend

Available KPIs

After clicking on “KPI manager” in the “Admin” menu, all available KPIs are displayed. They are grouped by object type (Release, Portfolio and Initiative). A KPI could be “standard”, meaning provided and provisioned directly by BizDock, or “custom”, meaning created by a User and provisioned by an external source for example with the [REST API](#).

KPI manager  

Portfolio 

	Name	Active	Trend	Box display
↓ ↑	Number of initiatives	✓	✓	✓
	CAPEX Deviation	✓	✓	✓
	OPEX Deviation	✓	✓	✓

Initiative 

	Name	Active	Trend	Box display
↓ ↑	Risks & Issues	✓	✓	✓
↓ ↑	Employees	✓	∅	✓
↓ ↑	Resources requests	✓	∅	✓
↓ ↑	Open story points	✓	✓	✓
↓ ↑	Open requirements	✓	✓	✓
↓ ↑	Open defects	✓	✓	✓
↓ ↑	In-scope requirements	✓	✓	✓
↓ ↑	Progress	✓	✓	✓

The inactive KPIs are also included in the lists.

For each group of KPIs, it's possible to change the order with the up and down arrows. The order is used when a set of KPIs is displayed.

It is not possible to change the order of some KPIs because they are never displayed with a set (for security reasons).

By clicking on a KPI, its management page is displayed.

Create a custom KPI

For each object type, it is possible to create custom KPIs: simply click on the add icon  in the wished panel.

The data related to a custom KPI should be externally provided, for example thanks the [REST API](#).

The management of a custom KPI is done with the same principle as a standard one, see next sections for more details.

Custom KPI attributes

Field	Description
Name	Name of the KPI. It corresponds to the name of the main value's definition.
First additional value's label	Name of the addition 1 value's definition.
Second additional value's label	Name of the addition 2 value's definition.
Icon	Icon of the KPI

Manage a KPI

Details

The Details panel contains the main information about the KPI.

Details 	
Active	✓
Data source	BizDock
Trend	✓
Filterable	✓
Box display	✓
UID	KPI_PORTFOLIO_DEVIATION_CAPEX
Parameters	-

Field	Description
Active	A KPI that is not active is never displayed in BizDock, and if it has a Scheduler , this last is not started.
Data source	Define the data source for the values of the KPI. It could be inside or outside BizDock. Usually a standard KPI is inside, and a custom is outside.
Trend	Define if the KPI has a trend chart. This is true when: The data source is outside BizDock, or The data source is inside BizDock and the Scheduler is configured.
Filterable	Define if the KPI could be filtered in the Roadmap. This is true when: The data source is outside BizDock, or The data source is inside BizDock and the Scheduler is configured with the “Real time” flag as disabled.
Box display	Define if the KPI has a box display (available in the dashboards). This is true when the KPI has 3 defined values .
Parameters	Some KPIs could be parametrized in order to contextualize them.

It's possible to edit the “Active” and “Parameters” attributes by clicking on the edit icon  .

Values' definition

The Values' definition panel allows to update the render of the KPI values.

A KPI could have 1 (main) or 3 (main, additional1, additional2) values.

Values' definition					
Name	Type	Displayed in trend	Render type	Render pattern	
CAPEX Deviation	main	✓	Pattern	:si %	
Budget	additional1	✓	Pattern	:default_currency_code :i	
Forecast	additional2	✓	Pattern	:default_currency_code :i	

A KPI that has only 1 value has no box display.

Field	Description
Name	The name of the value. For a “main” value, it is used as the column header for the tables and as the box title. For additional values, it is used as the sub-titles in the box display.
Type	Type of the value. Could be “main”, “additional1” and “additional2”. The “additional1” and “additional2” values are used only in the box display, on the left bottom respectively right bottom.
Render type	The render type of the KPI value. Value: the KPI Value is displayed without prefix and suffix. Pattern: the KPI Value is displayed through a pattern. Label: a label is displayed instead of the KPI Value (usually used only for the “main” value). The corresponding label is defined in the Coloring rules of the KPI.
Render pattern	Only and mandatory if render type is “Pattern”. It's possible to include in the pattern the following variables: :i for the rounding KPI value (for example 12) :si for the rounding KPI value with a sign (for example +12) :d for the decimal KPI value (for example 12.32) :sd for the decimal KPI value with a sign (for example +12.32) :default_currency_code for the default currency code (for example CHF) // Example 1 :default_currency_code :d // Example 2 :si %

If a render pattern is given while the render type is not “Pattern”, then it is simply ignored.

To edit a value definition, simply click on the edit icon  .

Scheduler

A KPI with a data source **inside** BizDock could be scheduled in order to have a trend chart.

Scheduler
  

Start time

03h00

Frequency (minutes)

1440

Field	Description
Start time	The start time of the scheduler execution. After that, the scheduler is triggered according to the frequency.
Frequency (minutes)	The scheduler frequency in minutes (after the start date).
Real time?	If true, then the KPI is displayed with a real time computation. The values stored thanks the scheduler are used only for the trend.

To edit the scheduler, simply click on the edit icon  . It is also possible to remove it by clicking on the icon  .

The icon  allows to start manually the execution of the scheduler.

If the KPI has currently no scheduler configured, simply click on the icon  to configure it:

Scheduler


There is no scheduler configured. Please click on the icon  to configure it.

Coloring rules

The coloring rules allow to manage the background of the KPI displays. A rule is interpreted according to the values of the KPI, and depending of them, its result could be "true" or "false". When a rule is resulting "true" then its color is applied.

A KPI contains a set of ordered coloring rules. They are interpreted according to the order, and immediately one is "true" the process stops.

Coloring rules +

	Rule	Color	Render label	
↓ ↑	<pre> 1 if (main != null && main <= 0) { 2 true; 3 } else { 4 false; 5 } </pre>	Green	-	✎ 🗑
↓ ↑	<pre> 1 if (main != null && main <= 10) { 2 true; 3 } else { 4 false; 5 } </pre>	Amber	-	✎ 🗑
↓ ↑	<pre> 1 if (main != null) { 2 true; 3 } else { 4 false; 5 } </pre>	Red	-	✎ 🗑

Field	Description
Rule	The JavaScript code of the rule. The last statement is either true or false. The following variables could be used: main, additional1, additional2. // Example 1 main/additional1 > 0.2; // Example 2 var i = additional1 + additional2; if (i == 3) { true; } else { false; }
Color	The color that is applied if the rule is true.
Render label	If the render type of a KPI value is "Label" then the render label is displayed instead of the value.

For each rule it is possible to:

- change its order by clicking on the icons and
- edit it by clicking on the icon
- remove it by clicking on the icon

It is also possible to add a new rule by clicking on the icon .

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