BizDock R15 Release Note

Initiative resources: Add monthly allocations for employees on an initiative

The "Manage allocated employee" form (cf Planning help section) has been updated with a new checkbox "Monthly allocation". Ticking this checkbox will replace the allocation "Start date" and "End date" fields by a view by month as displayed in the adjacent printscreen. The sum of the days will still be displayed in the "Days" field of the form and in the summary table.

Roadmap: Add a view by employee in the capacity table

A new tab has been added in the "Capacity table" view of the "Roadmap" page. This new table displays the current allocations and capacities of all the employees associated to the selected initiatives in the Roadmap. The same color code is used as in the other tables, that is:

- red for employees whose allocation overpass their capacity for the given month
- yellow for employees whose allocation overpass their capacity for the given month by less than a day
- green for employees whose allocation do not overpass their capacity for the given month
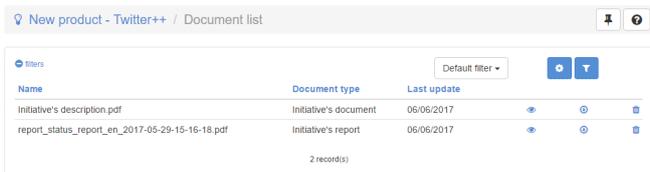
When selecting a cell in the table, the details of the month is displayed below. The detailed gives the list of initiatives which the employee is assigned to with the number of days and wether the allocation is confirmed or not. On the right side, a bar graph consolidate the allocations per initiatives.

Initiative documents: Add a page to manage all the documents associated to an initiative
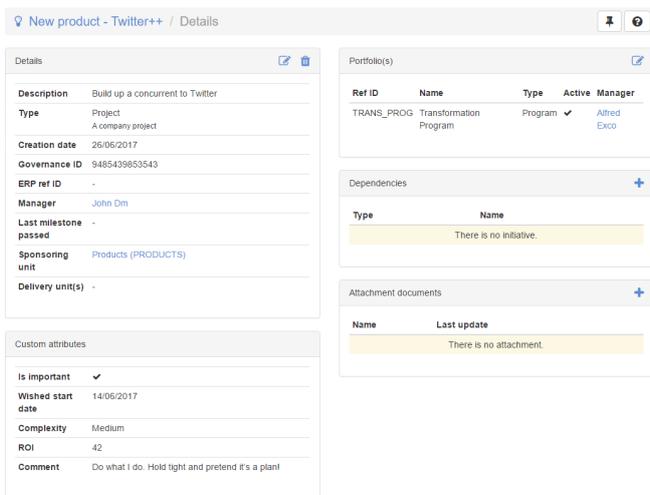
A new page has been added in the "Status reporting" section of an initiative. This page displays all the documents attached to the current initiative with the following information:

- the document's name
- the document's type (initiative's document, report, …)
- the document's date of last update
- a link to access the page where the document has been uploaded
- a link to directly download the document
- a link to remove the document

Custom attributes: Group custom attributes by category and display in separate panels

Custom attributes are now displayed in separate panels throughout the application and can be categorized by groups. Custom attributes in different groups will be displayed in their own panel in display and edit modes.

Enhancements / features

The following enhancements/features are part of the release:

ID	Description
#105	It is now possible to create custom attribute groups which will be displayed in dedicated panels
#104	The user name is now displayed in the profile page, user search results table and user summary page
#102	It is now possible to manage display permissions for each KPI
#100	New KPIs for budget and forecast with CAPEX / OPEX
#99	Add forecast in both org unit allocations reports

ID	Description
#98	Add a permission to edit a portfolio entry as portfolio stakeholder
#91	Make the tables in Planning ⇒ Ressources sortable and filterable

Solved defects

The following Defect fixes (detected in previous version) are part of the release:

ID	Description	Severity
#107	Timesheet reports didn't take into account employees with no org unit	High
#103	Fix shared storage output table column sorting	Medium
#101	Table filter actions where sensitive to user id case	Medium

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