

Governance

This page shows all the Governance Milestones of an Initiative/Release and their current status and planned date.

Milestone	Planned date	Status
New (New)	17/01/2016	Approved (27/01/2016)
T-1 (T-1)	02/03/2016	Rejected (20/02/2016) Approved (26/02/2016)
T0 (T0)	11/04/2016	Approved (01/04/2016)
T1 (T1)	26/04/2016	Approved (26/04/2016)
T2 (T2)	06/05/2016	Approved (06/05/2016)
T3 (T3)	31/05/2016	Pending (24/01/2016)
T4 (T4)	15/06/2016	Available
Live (Live)	04/08/2016	Available

For each Milestone:


- Name of the milestone
- Its planned date
- Its status - the possible status are:
 - Not planned: the Milestone does not have a planned date yet,
 - Available: the Milestone approval can be triggered,
 - Pending request: the Milestone approval process has been requested,
 - Pending: the Milestone approval has started and the request is under vote,
 - Approved: the Milestone was accepted,
 - Rejected: the Milestone was rejected - A new request will be required to have it accepted.

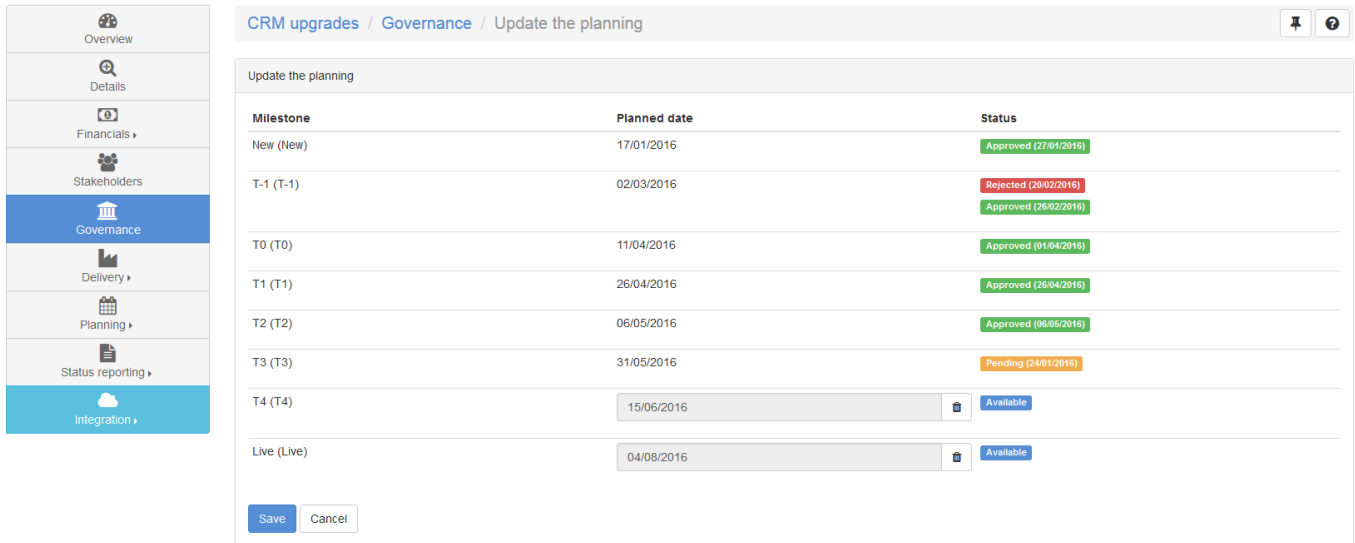
For the 2 last status, the displayed label corresponds to selected status when performing the final decision.

A Release process could contain 2 special milestones: the start and the end implementation dates. If a Release is assigned to a such process and the dates are given, then the burndown KPI could be fully computed.

Edit the Milestone planned dates

The  icon is not displayed if the Life Cycle Process has no milestone.


- Click on the  icon in the panel heading,



Milestone	Planned date	Status
New (New)	17/01/2016	Approved (27/01/2016)
T-1 (T-1)	02/03/2016	Rejected (20/02/2016) Approved (28/02/2016)
T0 (T0)	11/04/2016	Approved (01/04/2016)
T1 (T1)	26/04/2016	Approved (26/04/2016)
T2 (T2)	06/05/2016	Approved (06/05/2016)
T3 (T3)	31/05/2016	Pending (24/01/2016)
T4 (T4)	<input type="text" value="15/06/2016"/>	<input type="button" value="Available"/>
Live (Live)	<input type="text" value="04/08/2016"/>	<input type="button" value="Available"/>


- Update the planned date for each Milestone,
- Save.

The planned date of an accepted Milestone can not be changed anymore. When a date for a Milestone is displayed in BizDock, it is either the passed date (date when the Milestone was accepted) OR the planned date if the Milestone is not yet accepted.

If a planned date is in the past and the Milestone is not yet accepted, a small red bell icon  will appear near the date as it mean that it probably needs to be updated.

Add additional Milestones

If the process is defined as “flexible”, then additional Milestones can be added to the initiative life cycle.

- Click on the  icon on the right side of the panel heading.

Milestone	Planned date	Status
New (New)	26/01/2018	Approved (05/02/2018)
T-1 (T-1)	12/03/2018	Approved (07/03/2018)
T0 (T0)	21/04/2018	Approved (11/04/2018)
T1 (T1)	06/05/2018	Approved (06/05/2018)
T2 (T2)	16/05/2018	Approved (16/05/2018)
T3 (T3)	10/06/2018	Available
T4 (T4)	25/06/2018	Available
Live (Live)	14/08/2018	Available

- Fill the form to define a new additional milestone and its position in the process.

CRM upgrade / Governance / Update the planning / Manage an additional milestone

Insert after the following milestone *

T1

Short name * required for at least one language

English

Français

Deutsch

Name * required for at least one language

English

Français

Deutsch

Description

English

Français

Deutsch

Review required

Default status type *

Approved (The review committee has given its approval)

Approvers

Nothing selected

Save Cancel


- Save.

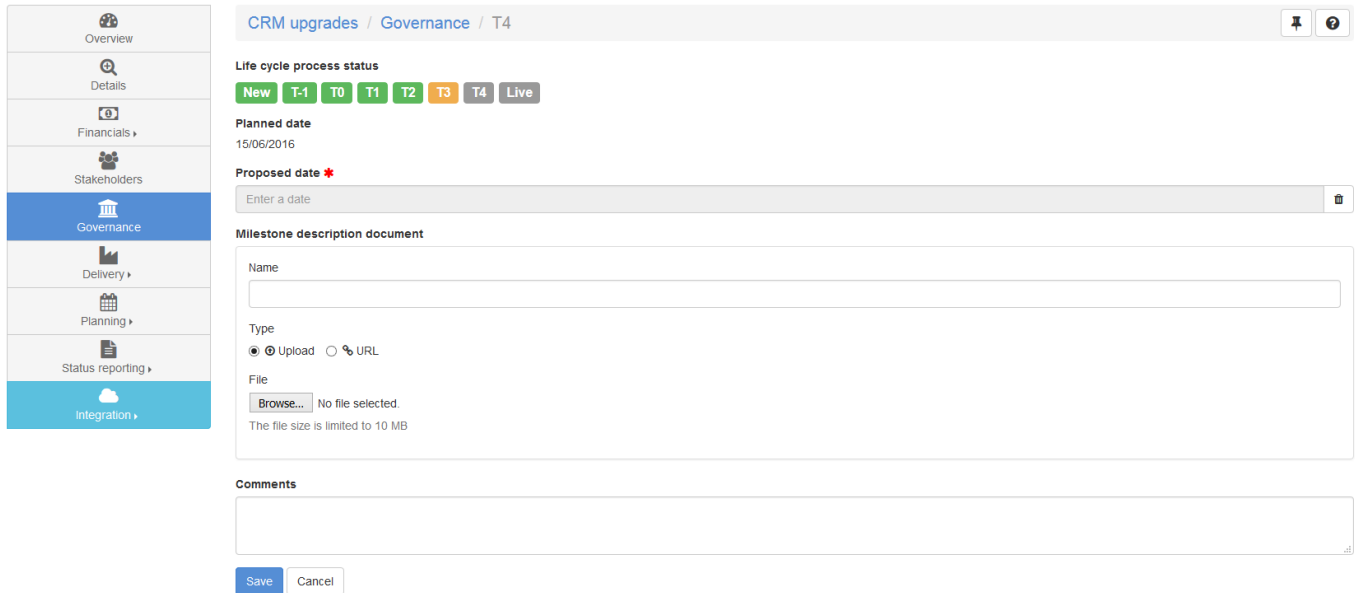
Milestones added in the initiative in that way can also be edited or deleted. Deleting a Milestone will also delete the Milestone decision data.

If a Life cycle process has its “Flexible” attribute deselected, all the additional Milestones will be

removed from the corresponding initiatives.

Request a Milestone approval

- Click on the  icon for the Milestone you want to request an approval



The screenshot shows a web interface for requesting a milestone approval. On the left is a navigation menu with options: Overview, Details, Financials, Stakeholders, Governance (highlighted), Delivery, Planning, and Status reporting, and Integration. The main content area has a breadcrumb trail: CRM upgrades / Governance / T4. Below this is a 'Life cycle process status' section with buttons for New, T-1, T0, T1, T2, T3, T4, and Live. The 'Planned date' is 15/05/2016. The 'Proposed date' field is empty with a red asterisk and a hint 'Enter a date'. The 'Milestone description document' section includes a 'Name' text box, a 'Type' section with radio buttons for 'Upload' (selected) and 'URL', and a 'File' section with a 'Browse...' button and a note 'No file selected. The file size is limited to 10 MB'. At the bottom is a 'Comments' text area and 'Save' and 'Cancel' buttons.

- Select the wished approval date for this Milestone (the planned date is given as an hint),
- It's also possible to attach a supporting document to the request and to enter a comment,
- Save. Depending on the configured [Life Cycle Process](#), the request will then be reviewed, go directly into vote or even be directly accepted.

View the Milestone decision details

Simply click on the Milestone line to access a full history of the decisions.

For each decision, the following panels are displayed:

- The details of the decision status
- The list of approvers with votes
- The Budget state at the final decision date
- The Resources state at the final decision date

The 2 last panels are displayed only if the final decision has been made.

CRM upgrades / Governance / T-1

Approved gate (26/02/2016) Rejected gate (20/02/2016)

Details

Passed ✓
 Approved ✓
 Status Approved
 Decision maker -
 Passed date 26/02/2016
 Comments -

Budget status at 26/02/2016

Name	Expenditure type	Currency	Amount
Development UI	CAPEX	CHF	20,000
Development backend	CAPEX	CHF	50,000
Serers	CAPEX	CHF	400,000
Service Support	OPEX	CHF	20,000

Approvers


Employee	Status	Vote date	Comments
Alfred Excop	No vote	-	-
John Dm	No vote	-	-
Bill Finance	No vote	-	-

Resources status at 26/02/2016

Type	Resource	Days	Date	Confirmed
Operations (OPS)		5	from 27/01/2016 to 16/02/2016	⊗
Bill Finance		15	from 27/01/2016 to 26/02/2016	⊗
Gustav Archi		5	from 18/02/2016 to 07/03/2016	✓
James Dev		30	from 09/03/2016 to 16/04/2016	⊗
Consumer Marketing (MARKETING_CONSUMER)		15	from 17/04/2016 to 06/05/2016	✓

Change the Life Cycle Process

Changing a Life Cycle Process will **RESET** all the Milestones (and related decision).

- Click on the  icon,

CRM upgrades / Governance / Change the life cycle process

Important notice: changing the life cycle process will reset ALL the passed milestones, the planning and the budget. It will also set the initiative to "Concept".

Default (Default life cycle process when you do not know what to choose)

Default (Default life cycle process when you do not know what to choose)
 Marketing board (Marketing board Governance life cycle)
 Technical board (Technical board Governance life cycle)

- Select a new Life Cycle Process,
- Click on "Change".

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<https://help-online.bizdock.io/> - **BizDock**

Permanent link:
<https://help-online.bizdock.io/doku.php?id=user-guide:initiative:governance>

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