

Status reporting

The status reporting represents all relevant information about the evolution of the Initiative/Release.

Registers

The status registers are represented by 3 tables:

- Reports: a Report is a comment with a status (Green, Amber or Red)
- Risks: a Risk is a problem that could occur in the future
- Issues: an Issue is a problem that has been occurred

Attributes

Report

A Report has the following set of attributes:

Field	Description
Date	The creation date of the Report. This information is automatically computed.
Author	The creator of the Report. It represents the Employee which created the Report. This information is automatically computed.
Status	The status of the Report. Green if everything is OK, Amber if a small or medium problem affects the Initiative/Release, Red if a large a critical problem affects the Initiative/Release.
Comment	Details of the Report.
Documents	List of attached documents of the Report. When creating a new Report it's possible to attach a document. Then to manage the documents of an existing Report, simply go to its identity card.

Risk

A Risk has the following set of attributes:

Field	Description
Active?	Checked if the Risk could still occur.
Name	Short description of the Risk.
Description	Full description of the Risk.
Type	Type of the Risk.
Target date	Date for which the Risk could occur.
Mitigated?	Checked if some actions have been done to reduce the impact of the Risk.
Mitigation action	Description of the mitigation actions.

Issue

An Issue has the following set of attributes:

Field	Description
Active?	Checked if the Issue is currently not solved.
Name	Short description of the Issue.
Description	Full description of the Issue.
Type	Type of the Issue.
Due date	Date for which the Issue would be resolved.
Owner	Employee which ensures the management of the Issue.

Identity cards


→ The [Initiative/Release's "view complete data" permission](#) is needed to display the Registers' identity cards.

Dashboard

The Registers identity cart is represented by:

- The list of status Reports with management capabilities (add, edit and remove): by clicking on a row, the identity card of the selected Report is displayed
- The list of Risks with management capabilities (add and edit): by clicking on a row, the identity card of the selected Risk is displayed
- The list of Issues with management capabilities (add and edit): by clicking on a row, the identity card of the selected Issue is displayed

In the Risks and Issues tables, a red bell is displayed (in the date columns) if a Risk or Issue is late.

In the Risks and Issues tables, the inactive entries are not displayed. It's possible to have a full view by clicking on the "Full view" icon .

CRM upgrades / Status registers

Status report

Report date	Author	Status	Comment	EN - Important
17/01/2016	Robert Pm	Red	We have some troubles with our main supplier. Need to be escalated as no time to work on the project before Xmas.	✓
18/12/2015	Robert Pm	Green	Good progress in the specification of the requirements. To be continued. First discussion with our main supplier for implementation	∅
08/12/2015	Robert Pm	Green	Project started. Resources assigned. Writing of the business requirements on-going.	∅


Risks & Issues

Risks register

Name	Target date	Type	Owner	Active
Delay in delivery of servers	06/02/2016	Planning	-	✓
No more ressource	17/03/2016	Resource	-	✓

Issues register

Name	Due date	Type	Owner	Active
Bug during testing	-	Planning	John Dm	✓

By clicking on the download icon  in the Reports table, a PDF status report of the Initiative/Release is generated. A notification is sent when it is available to download.

Report

The Report's identity card is represented by:

- Report's attributes
- The list of attached documents with management capabilities (add, remove)

CRM upgrades / Status registers / Report of 17/01/2016

Details

Report date: 17/01/2016

Author: Robert Pm

Status: Red

Comment

We have some troubles with our main supplier. Need to be escalated as no time to work on the project before Xmas.

Attachment documents

Name	Last update
There is no attachment.	

Back

Risk

The Risk's identity card is represented by:

- Risk's attributes

The screenshot shows a sidebar on the left with navigation items: Overview, Details, Financials, Stakeholders, Governance, Delivery, Planning, Status reporting (highlighted), and Integration. The main content area has a breadcrumb trail: CRM upgrades / Status registers / Delay in delivery of servers. Below this is a 'Risk' card with the following details:

Name	Delay in delivery of servers
Description	Servers would arrive after the planned launch date
Creation date	18/12/2015
Target date	06/02/2016
Type	Planning The risk is associated with the planning.
Mitigated	✓
Mitigation action	Take some old ones
Owner	-

A 'Back' button is located below the card.

Issue

The Issue's identity card is represented by:

- Issue's attributes

The screenshot shows the same sidebar as above. The main content area has a breadcrumb trail: CRM upgrades / Status registers / Bug during testing. Below this is an 'Issue' card with the following details:

Name	Bug during testing
Description	Big performance issue has been detected
Creation date	08/12/2015
Due date	-
Type	Planning The risk is associated with the planning.
Owner	John Dm


A 'Back' button is located below the card.

Data management

→ The [Initiative/Release's update permission](#) is needed to manage reports, risks and issues.


Report

Add a Report


1. Go to the [Registers identity card](#),
2. Click on the "Add" icon  inside the Reports table,

3. Complete the Report's attributes and Save,
4. The new Report has been added.

Edit a Report


1. Go to the [Registers identity card](#),
2. Click on the "Edit" icon  for the wished Report,
3. Modify the Report's attributes and Save,
4. The Report has been updated.

Delete a Report


1. Go to the [Registers identity card](#),
2. Click on the "Delete" icon  for the wished Report,
3. Confirm that you want to delete the Report. **A Report can not be restored once deleted. If you delete one by error, you will have to re-create it.**
4. The Report is deleted.

Risk

Add a Risk

1. Go to the [Registers identity card](#),
2. Click on the "Add" icon  inside the Risks table,
3. Complete the Risk's attributes and Save,
4. The new Risk has been added.


Edit a Risk

1. Go to the [Registers identity card](#),
2. Click on the "Edit" icon  for the wished Risk,
3. Modify the Risk's attributes and Save,
4. The Risk has been updated.


The "Edit" icon is also available in the [Risk identity card](#).

Issue

Add a Issue

1. Go to the [Registers identity card](#),
2. Click on the "Add" icon  inside the Issues table,
3. Complete the Issue's attributes and Save,
4. The new Issue has been added.

Edit a Issue

1. Go to the [Registers identity card](#),
2. Click on the "Edit" icon  for the wished Issue,
3. Modify the Issue's attributes and Save,
4. The Issue has been updated.

The "Edit" icon is also available in the [Issue identity card](#).

Events

An Event is a comment with a type (Information, Decision...) which details something that happened about the Initiative/Release.

Attributes

An Event has the following set of attributes:

Field	Description
Type	The type of the Event.
Creation date	The creation date of the Event. This information is automatically computed.
Author	The creator of the Event. It represents the Employee which created the Event. This information is automatically computed.
Message	The full explanation of the Event.

Identity card

→ The [Initiative/Release's "view complete data" permission](#) is needed to display an Events' identity card.

The Events' identity card is represented by:

- The list of Events with management (add, edit and delete) and filtering capabilities

- Overview
- Details
- Financials >
- Stakeholders
- Governance
- Delivery >
- Planning >
- Status reporting >
- Integration >

CRM upgrades / Events

filters

Default filter -

Type	Creation date	Author	Message		
Decision	27/01/2016	Robert Pm	Following last Steering Committee, the project is delayed by 3 months		
Information	27/01/2016	Robert Pm	Feasibilit study not at the expected quality level, need some rework before sending it for approval		

2 record(s)

It's possible to export (Excel format) the list by clicking on the button



Event management

→ The [Initiative/Release's update permission](#) is needed to manage events.

Add an Event

1. Go to the [Events identity card](#),
2. Click on the “Add” icon inside the Events table,
3. Complete the Event's attributes and Save,
4. The new Event is now available.

Edit an Event

1. Go to the [Events identity card](#),
2. Click on the “Edit” icon for the wished Event,
3. Modify the Event's attributes and Save,
4. The Event data have been updated.

Delete an Event

1. Go to the [Events identity card](#),
2. Click on the “Delete” icon for the wished Event,
3. Confirm that you want to delete the Event. **An Event can not be restored once deleted. If you delete one by error, you will have to re-create it.**

4. The Event is deleted.

Timesheets

Table with all timesheeted jobs on the Initiative/Release with filtering capabilities.

CRM upgrades / Timesheets

filters

Default filter

Employee	Org unit	Date	Hours	Status	Planning package
James Dev	Development (DEV)	18/01/2016	4	Submitted	-
Steven All	IT (IT)	18/01/2016	4	Approved	-
James Dev	Development (DEV)	19/01/2016	4	Submitted	-
Steven All	IT (IT)	19/01/2016	5	Approved	-
Steven All	IT (IT)	20/01/2016	8	Approved	-
James Dev	Development (DEV)	20/01/2016	4	Submitted	-
Steven All	IT (IT)	21/01/2016	4	Approved	-
James Dev	Development (DEV)	21/01/2016	4	Submitted	-
Steven All	IT (IT)	26/01/2016	24	Rejected	Business Requirements sign-off (CAPEX)
Steven All	IT (IT)	27/01/2016	4	Rejected	Business Requirements sign-off (CAPEX)

1 2

15 record(s)

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