

Roadmap

→ To get access to the Roadmap, the permission ROADMAP_DISPLAY_PERMISSION is required.

Roadmap - Table view

The Roadmap table view is listing all the Initiatives/Releases based on the permissions of the BizDock User as listed on [Initiative/Release permissions](#). As a complement:

- A **Confidential Initiative/Release** is only displayed for the BizDock Users who are either Manager, Portfolio Manager or Stakeholder (direct or from a Portfolio) of this entry.
- Idem for a **Concept Initiative/Release**: only BizDock Users that are either Manager, Portfolio Manager or Stakeholder (direct or from a Portfolio) of this entry can see it.

<input type="checkbox"/>	Governance ID	Name	Type	Manager	Status	Concept	Last milestone passed	Deviation CAPEX
<input type="checkbox"/>	19	Billing consolidation: 3-2-1	Project	Steven All	-	✓	-	-
<input type="checkbox"/>	PRO8	Black Star	Project	Robert Pm	Red	✓	-	-
<input type="checkbox"/>	PRO10	Call Center Telephony	Project	John Dm	-	✓	-	-
<input type="checkbox"/>	PRO6	Confidential Project	Project	Robert Pm	-	✓	-	-
<input type="checkbox"/>	PROJ1	CRM upgrade	Project	Robert Pm	Green	⊗	T2 (T2)	-79 %
<input type="checkbox"/>	PRO7	ERP V2.3	Project	John Dm	-	✓	-	-
<input type="checkbox"/>	PRO814	GLO v3.4	Upgrade	John Dm	-	✓	-	-
<input type="checkbox"/>	-	Improve cross-up selling in Call Center	Project	Robert Pm	Green	✓	-	-79 %
<input type="checkbox"/>	PRO13	Incentives management	Project	Robert Pm	-	✓	-	-
<input type="checkbox"/>	Migration	Migration to new Active directory	Upgrade	John Dm	Green	✓	-	-

By default, only the active Initiatives/Releases are displayed, this can be simply modified by changing the filters.

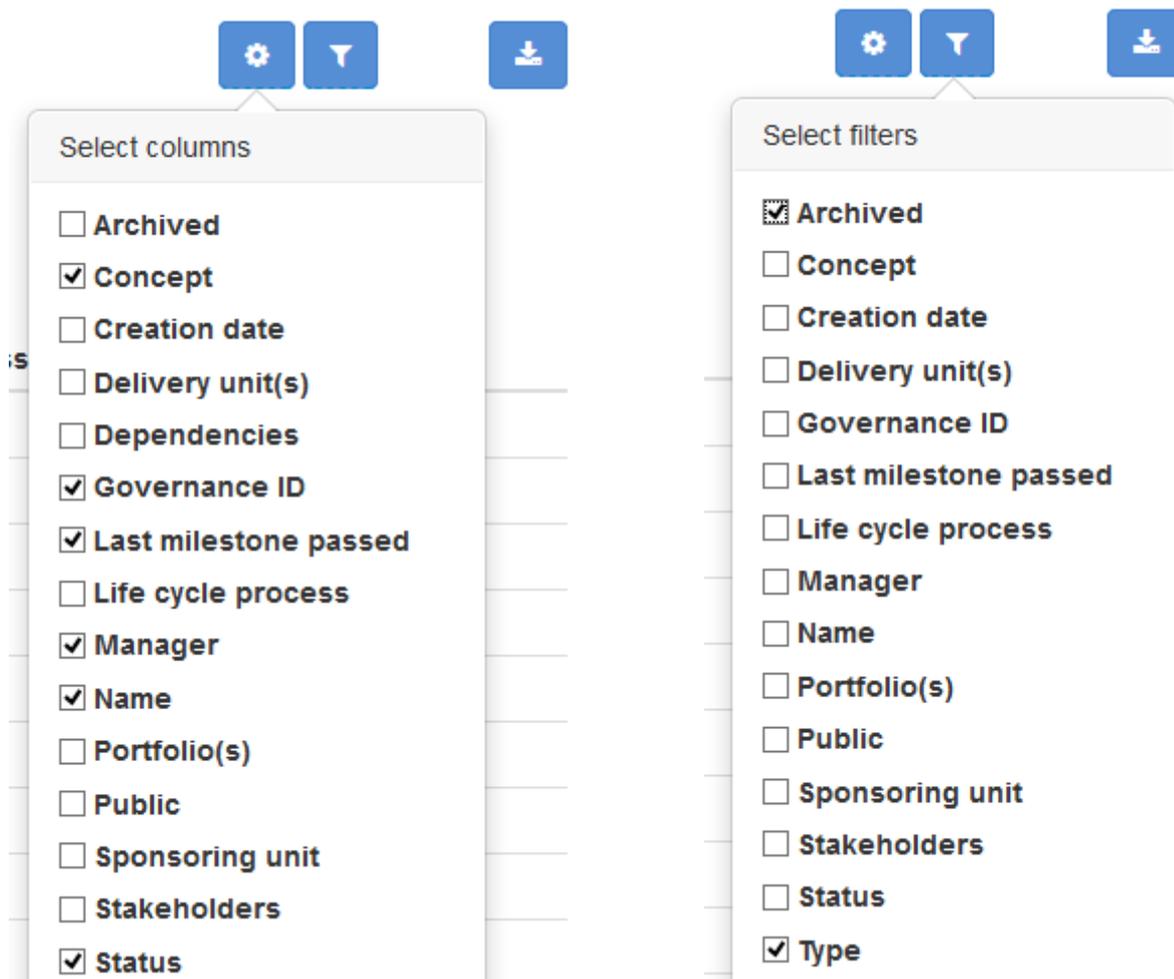
The checkboxes (first column) and the actions selector are displayed only if the user has the permission ROADMAP_SIMULATOR_PERMISSION. This feature is detailed in the [Capacity simulator](#) section.

The “Status” column has a particular comportment: first when the mouse overs it then an infobulle is displayed with the report comment, and by clicking on it then the corresponding report is displayed.

Filters and columns selection

Each BizDock User can personalize his Roadmap view. He can select filters to restrict the list of

entries (each filter can be selected once) and choose which columns are visible (including the configured Custom Attributes). Again, the Initiatives/Releases list is based on the BizDock User's Permissions.



KPI

The Roadmap includes the KPI related to the Initiatives/Releases. It's possible to filter on them, and to show or hide their column.

They are located at the end of the filter and column selectors:

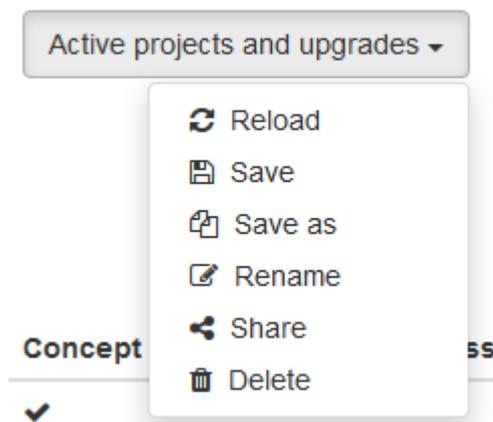


Not all KPI are filterable. The rule is explained in the [administrator's guide](#).

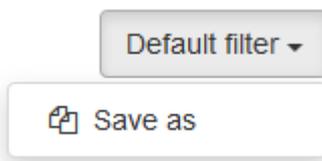
Save a filter

It is possible to save unlimited number of filter configurations. Simply click of the dropdown selector that contains the name of the current filter (if there is no current filter then the label “Default filter” is displayed instead):

- With a current filter:



- Without a current filter



The possible actions are:

- Reload: reload the last saved status of the current filter configuration
- Save: save the current filter configuration
- Save as: create a new filter configuration (the current filter is not altered)
- Rename: change the name of the current filter configuration
- Share: share the current filter configuration with another BizDock user thanks a notification or a simple link
- Delete: delete the current filter configuration

Excel export

By simply clicking on the  button, an Excel export of the Roadmap table will be made available in the BizDock User's [Personal space](#).

Capacity simulator

The capacity simulator actions are available for users with the permission ROADMAP_SIMULATOR_PERMISSION.

To trigger a simulator action, simply check the wished Initiatives/Releases and select an action in the "Actions" selector.

Capacity KPI

The capacity KPI is represented by 4 KPI-boxes with the following data:

- Sum of budgets with CAPEX/OPEX split
- Sum of forecasts with CAPEX/OPEX split
- Sum of engaged with CAPEX/OPEX split
- Sum of allocated resources (Org Unit, Competency and Employee) with confirmed/not confirmed split

The boxes are dynamically displayed on the top of the page just after the trigger of the action.

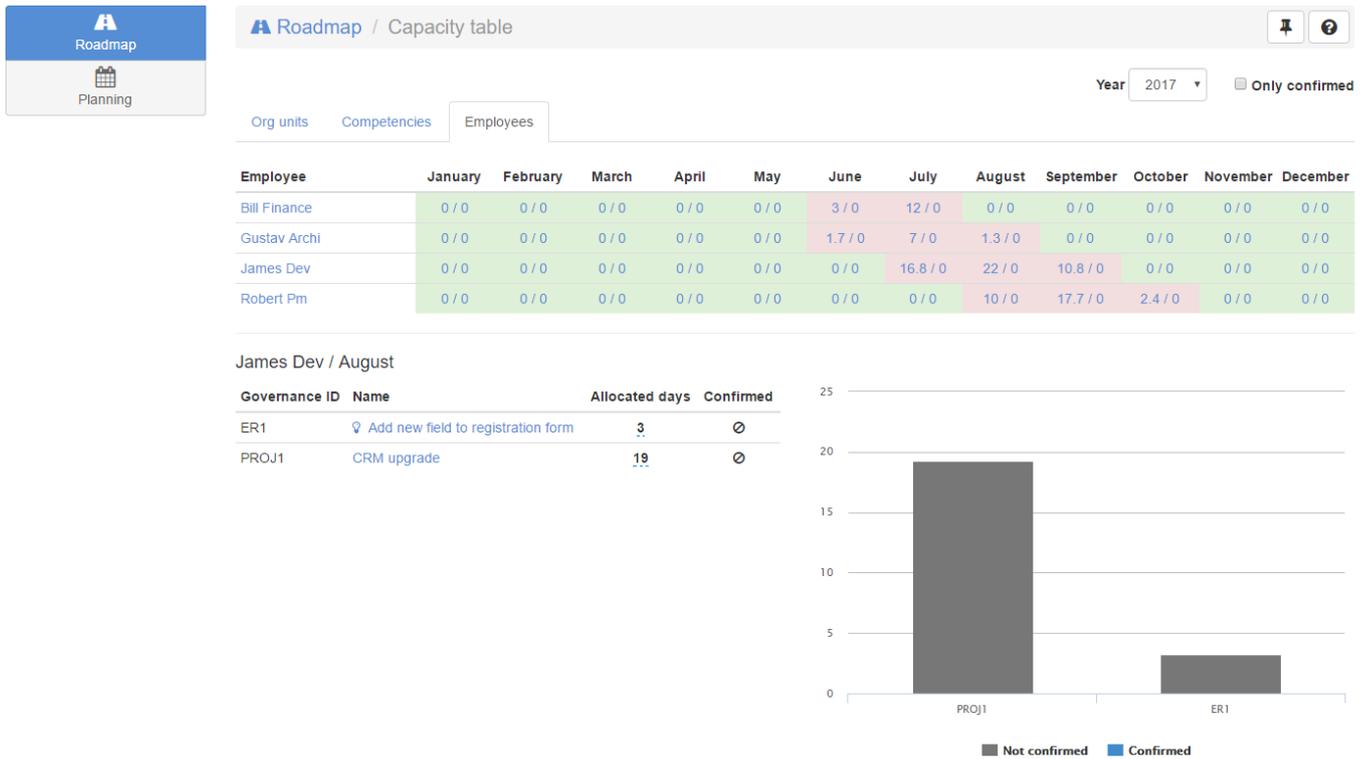
The screenshot shows the 'Roadmap' application interface. At the top left, there are navigation buttons for 'Roadmap' and 'Planning'. The main content area features three KPI boxes: 'BUDGET' (CHF 808,500), 'FORECAST' (CHF 293,500), and 'ALLOCATIONS' (284). Below these are filter controls and a table of initiatives.

<input type="checkbox"/>	Governance ID	Name	Type	Manager	Status	Concept	Last milestone passed	Deviation CAPEX
<input checked="" type="checkbox"/>	ER1	Add new field to registration form	Enhancement	John Dm	Amber	✓	-	-
<input checked="" type="checkbox"/>	19	Billing consolidation: 3-2-1	Project	Steven All	-	✓	-	-
<input checked="" type="checkbox"/>	PRO8	Black Star	Project	Robert Pm	Red	✓	-	-
<input checked="" type="checkbox"/>	PRO10	Call Center Telenorv	Project	John Dm	-	✓	-	-

The financial boxes (budget and forecast) are displayed only if the user has the permission PORTFOLIO_ENTRY_VIEW_FINANCIAL_INFO_ALL_PERMISSION.

Capacity table

The capacity table is a powerful table with a month-distributed overview of the allocations.



On the top of the page, it is possible to configure the selected year and to filter the allocations with only the confirmed ones. The table reloads automatically when changing any value.

Under the configuration area, a 3-tabs selector is shown. The first tab represents the allocations grouped by "Org units", the second one by "Competencies" and the third one by "Employees".

Finally, the details of an allocation summary (Org units, Competencies or Employees) can be displayed just under the table by clicking on a cell.

Org Units table

A row represents an Org Unit concerned by at least one of the checked Initiatives/Releases, meaning either the Org Unit or an Employee of the Org Unit is allocated to the entry.

A cell is a 2-values content (planned / available):

- Planned: sum of Org unit allocations for the checked Initiatives/Releases, plus sum of Org Unit's Employees allocations for the checked Initiatives/Releases, plus sum of Org Unit's Employees allocations for all activities.
- Available: sum of capacities of the Org Unit's Employees.

The Employees allocations for the activities and the "available" value do not change regardless of the checked entries.

Only the allocations with a start and an end date are taken in account.

If an allocation concerns many months, then it is fairly distributed on the concerned months. Here is an example:

Given an allocation of 10 days for the period from the 21/04/2015 to the 20/05/2015 (that is 30 days).
 The ratio for a day is equal to $10/30 = 0.333$
 The period contains exactly 10 days for April and 20 days for May.
 So the distribution is done as follow: for April $10 * 0.333 = 3.3$ and for May $20 * 0.333 = 6.7$

The background color of a cell depends of the cell values:

1. If the available value is greater or equal to the planned value, then green
2. Else if the available value plus a tolerance is greater or equal to the planned value, then amber
3. Else red

The tolerance is a percent value defined in the [System preferences](#). The default value is 10%.

Competencies table

A row represents a Competency concerned by at least one of the checked Initiatives/Releases, meaning either the Competency or an “Employee with the Competency as the principal one” is allocated to the Initiatives/Releases.

A cell is a 2-values content (planned / available):

- Planned: sum of Competency allocations for the checked Initiatives/Releases, plus sum of “Employees with the Competency as the principal one” allocations for the checked Initiatives/Releases, plus sum of “Employees with the Competency as the principal one” allocations for all activities.
- Available: sum of capacities of the “Employees with the Competency as the principal one”.

The other principles described in the “Org Units table” sections are also relevant here.

Employees table

A row represents an Employee concerned by at least one of the checked Initiative, meaning that Employee is allocated for at least one day on the given Initiative.

A cell is a 2-values content (planned / available): * Planned: sum of the Employee allocations for the checked Initiative and for the given month * Available: capacity of the Employee for the given month

Org Unit / Competency Cell details

The “cell details” is displayed under the Org Units/Competencies table after having clicked on a cell content.

1. Table: the table (on the left) contains for the first row the data related to the corresponding Org

Unit/Competency and for the other rows the data related to the Employees of the corresponding Org Unit/Competency.

2. Chart: the bar chart (on the right) is a visual representation for the Employees rows.

Employee Cell details

The “cell details” is displayed under the Employees table after having clicked on a cell content.

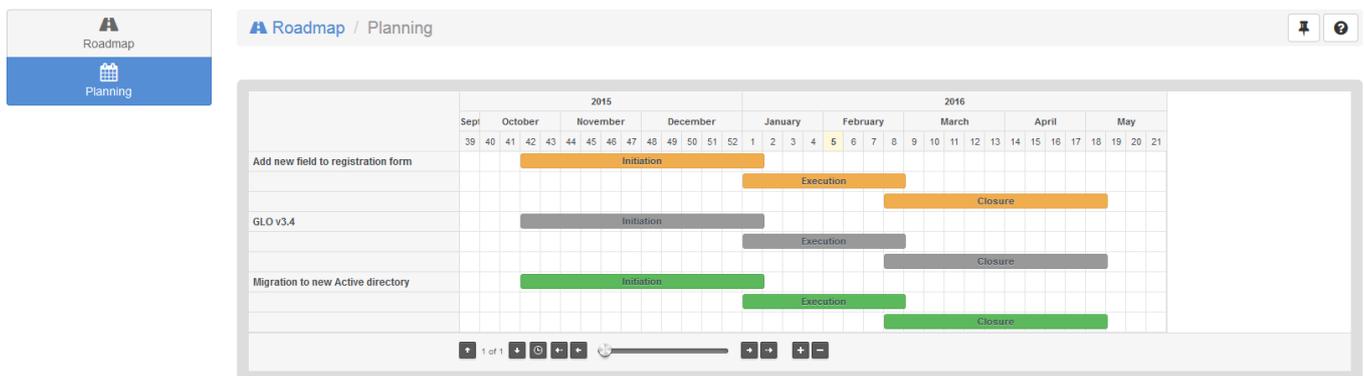
1. Table: the table (on the left) contains for the first row the data related to the corresponding Employee and for the other rows the data related to the Initiatives allocated to the Employee. The number of days allocated to the Initiative can be directly updated by clicking the corresponding number. Once the new number of days has been validated, the table is automatically reloaded.
2. Chart: the bar chart (on the right) is a visual representation for the Initiative rows.

Coloring rules (for the background) of the table:

1. The first row is never colored
2. If the available value is greater or equal to the sum of “Confirmed entries”, “Not confirmed entries” and “Activities” values, then green
3. Else if the available value is greater or equal to the sum of “Confirmed entries” and “Activities” values, then amber
4. Else red

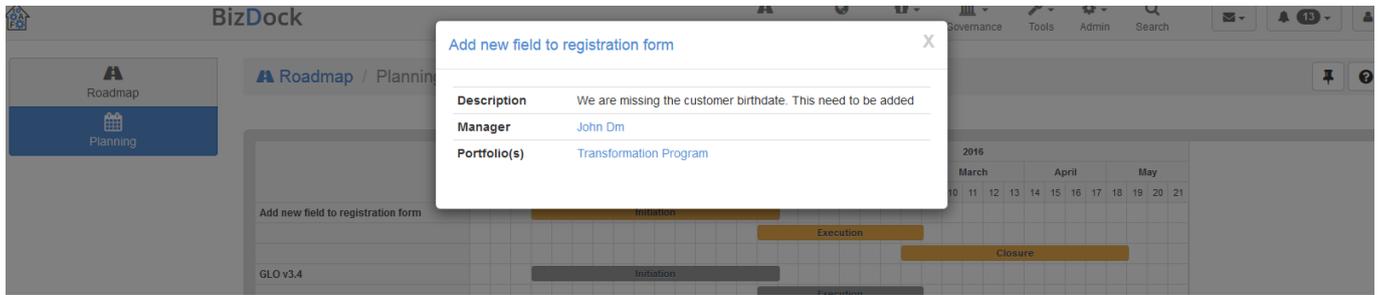
Roadmap - Gantt

The Roadmap can also be visualized as a Gantt chart.



Each phase can be configured on demand, the start and end dates represent a [Milestone](#). The color of the phase is the one of the latest [Status Report](#).

It's easy to get some information about the Initiative/Release by simply clicking on the phase bar.



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