

# ■ AppZen Roadmap Tracker

## User Guide

How to navigate, create, edit, and collaborate on the roadmap.

Last updated: April 28, 2026

<https://appzen-roadmap-tracker.vercel.app/>

# Welcome

The AppZen Roadmap Tracker is the single source of truth for AppZen's product and engineering roadmap. It replaces the old Excel-based roadmap with a live, multi-user web app that surfaces what each team is shipping each month, who owns what, and what's at risk.

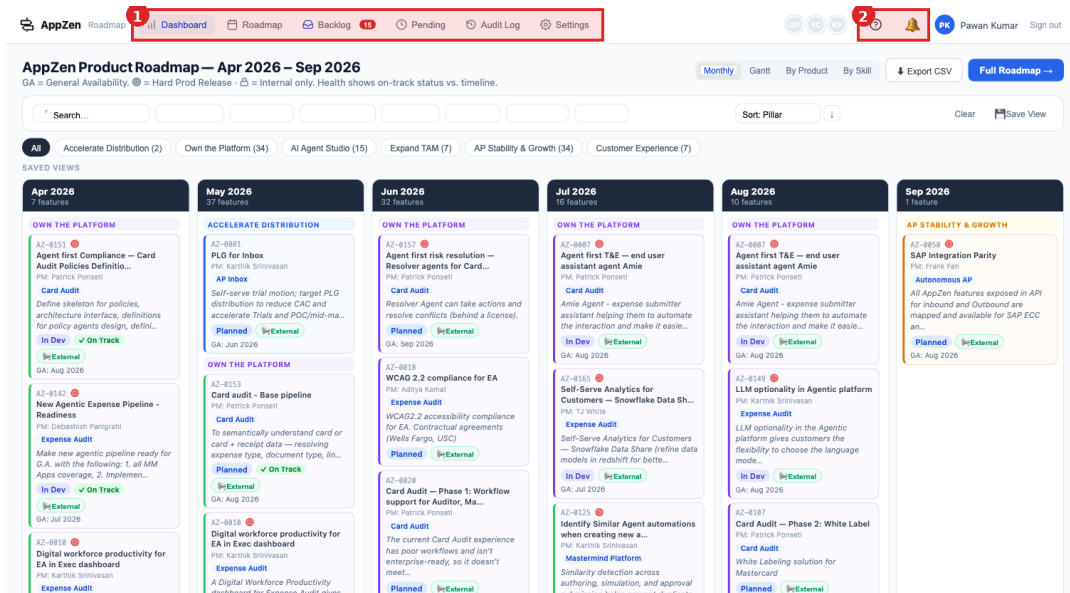
This guide walks through every major workflow — from creating a feature to setting up scheduled reports.

## Navigation overview

Across the top of every page, six tabs anchor the app:

- **Dashboard** — the high-level rolling 6-month view. Pillar pills, monthly distribution, gantt charts, skill bandwidth.
- **Roadmap** — the dense table view. Filter, sort, drag columns, save views.
- **Backlog** — features without firm dates. Anything missing dev start, GA, and prod release date lives here.
- **Pending** — your personal verification queue across all features.
- **Audit Log** — append-only history of every change, with filters.
- **Settings** — months, skills, FTE capacity, scheduled reports, view history, recently deleted.

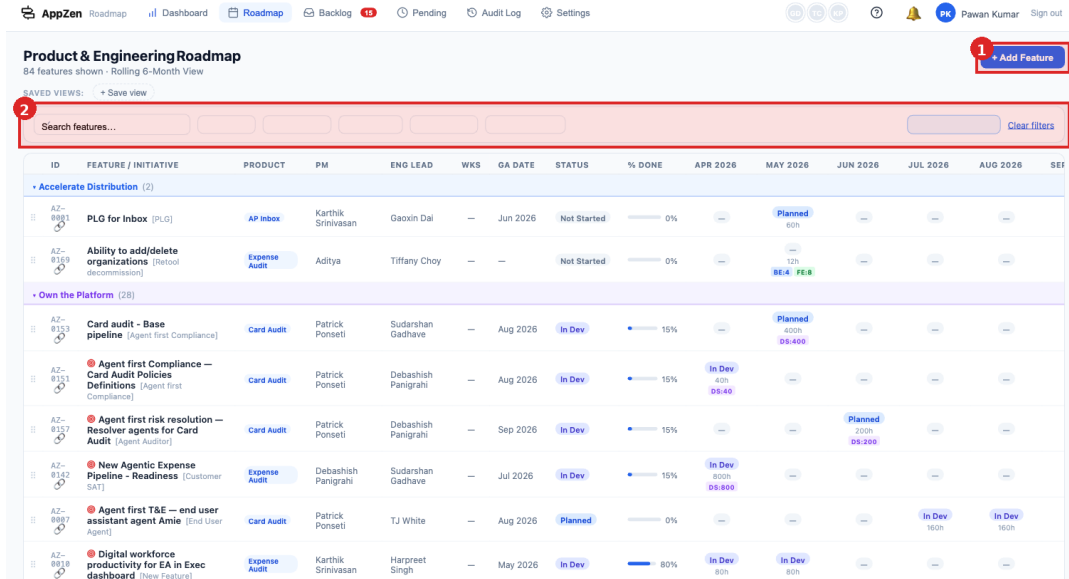
**Tip:** The bell to the right of the nav lights up when you have unread @mentions or other notifications.



Box 1 — the six page tabs. Box 2 — Help (?), bell, your avatar.

# Creating a Feature

From the Roadmap or Backlog page, click the blue **+ Add Feature** button (top right of the page header).



Roadmap page. **Box 1** — + Add Feature button. **Box 2** — search & filter bar.

## What's required vs optional

Only **Feature Name** is required. Everything else can be filled in as you learn more. The system auto-generates the Feature ID (AZ-XXXX) on save — you'll see it appear in the modal title once saved.

## Roadmap vs Backlog placement

If you set **any** of *Dev Start*, *GA Date*, or *Prod Release Date*, the feature lands on the Roadmap. If all three are blank, it lands in the Backlog. You can move it later just by adding or clearing dates.

## PM Owner and Eng Lead

These fields use a Jira-style autocomplete picker — start typing and click an existing canonical name to avoid creating duplicates ("Patrick" vs "Patrick Ponseti"). If neither exists yet, just type freely and the new name is recorded.

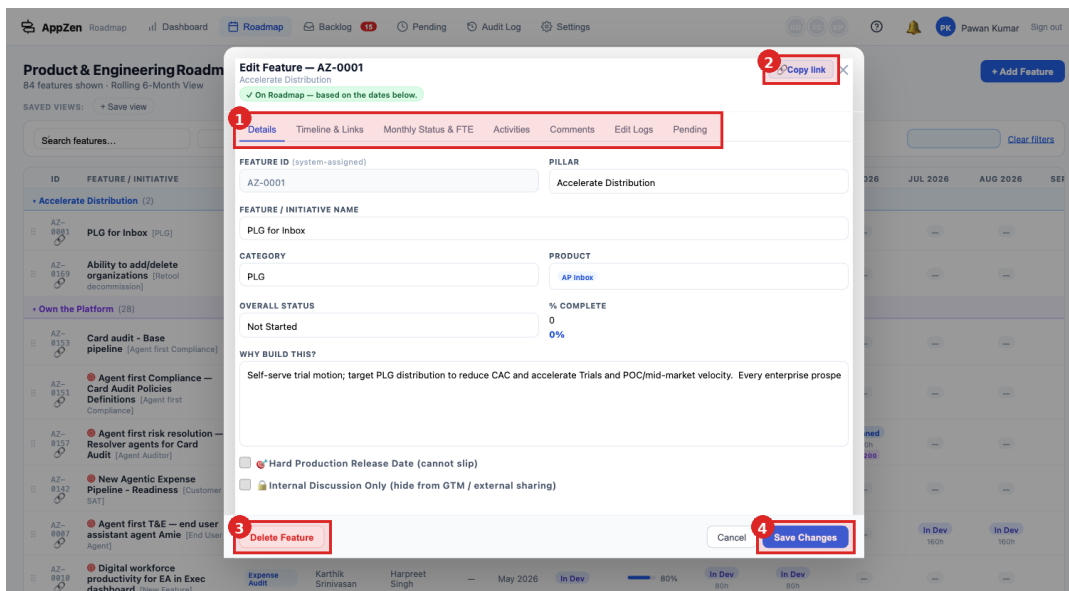
■ **Tip:** PM Owner and Eng Lead must be different people. The system blocks save with a clear error if both fields contain the same name.

# Editing a Feature

Click any row on the Roadmap, Backlog, or feature card on the Dashboard to open its modal. The modal has six tabs:

- **Details** — pillar, name, category, product, status, % complete, Why Build, hard-release/internal flags.
- **Timeline & Links** — PM/Eng owners, weeks estimate, dates, dependencies, risks, notes, PRD/Doc/Jira URLs.
- **Monthly Status & FTE** — per-month sprint status, total FTE hours, per-skill breakdown, and the per-month **Deliverable** field (see the next section).
- **Activities** — required-work checklist (PRD, Design, QE, etc.) — see the dedicated section.
- **Comments** — threaded discussion with @mention support.
- **Edit Logs** — append-only history of every change to this specific feature.
- **Pending** — verification queue scoped to this feature (only appears with a count badge when there's something for you to verify).

Hit **Save Changes** to persist. Cancel discards. The system captures every field-level diff in the audit log automatically.



Feature modal — Details tab. 1 — tab strip. 2 — Copy link. 3 — Delete (soft-deletes for 30 days). 4 — Save Changes.

## Deleting and Restoring

Inside any feature's modal, the red **Delete Feature** button (bottom-left) moves the feature to *Recently Deleted*. It's a soft delete — the feature disappears from Roadmap, Backlog, and Dashboard, but stays restorable for 30 days.

### To restore a feature

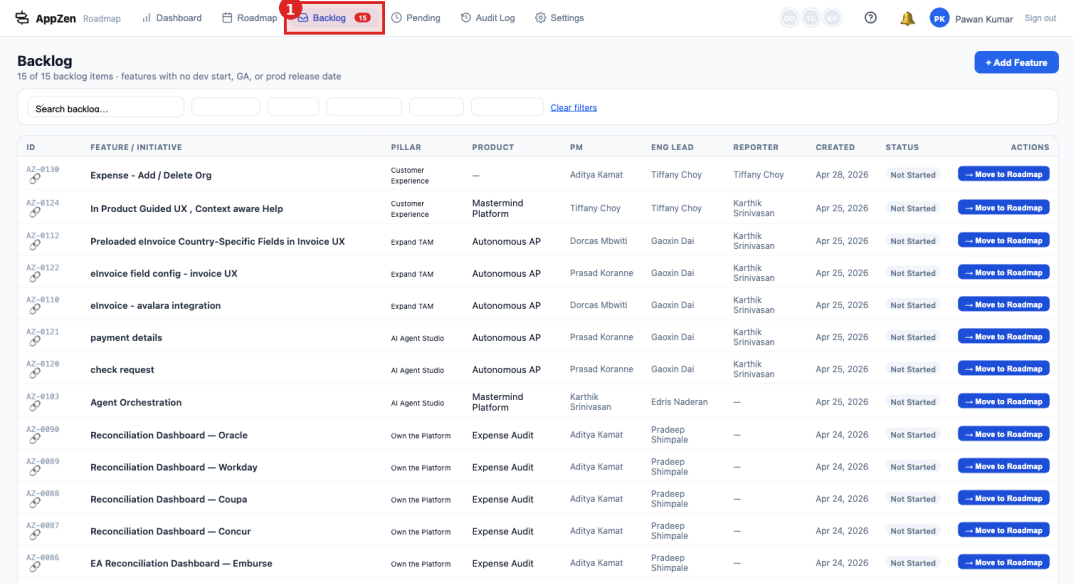
1. Go to **Settings** → **Recently Deleted**.
2. Find the feature in the list (each row shows the days remaining before permanent deletion).

3. Click the green ■ **Restore** button. The feature reappears on the Roadmap or Backlog (depending on its dates).

After 30 days, soft-deleted features are **permanently removed** by an automatic daily job. You can also click ✕ **Delete now** to skip the wait.

# The Backlog

The Backlog is the rolling list of features that don't have firm timelines yet. The rule is simple: **any feature with no Dev Start, no GA Date, and no Prod Release Date sits in the Backlog**. The moment you add any of those three dates, it auto-promotes to the Roadmap.



Backlog page. **Box 1** — the Backlog tab in the navbar (count badge shows pending items).

## Filtering the Backlog

The filter bar at the top of the Backlog page lets you slice by:

- Product
- PM Owner
- Eng Lead
- Skill (matches features that have any FTE-by-skill rows)
- Reporter — the user who created the feature

All filters are multi-select with consistent UX: type to search inside the dropdown, selected items appear at the top on the next open.

## Per-Month Deliverables

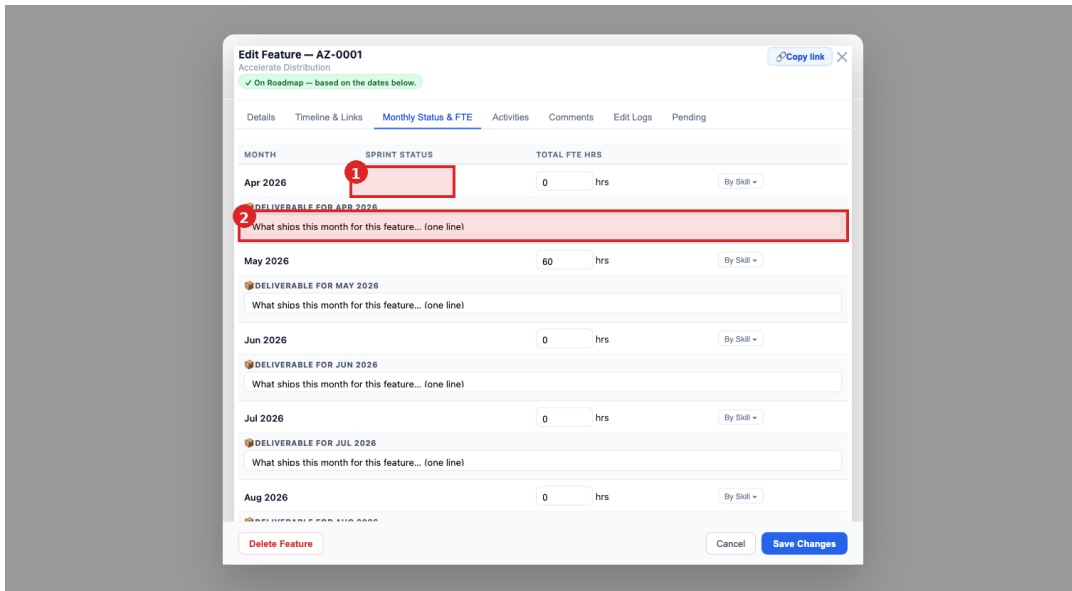
Inside a feature's **Monthly Status & FTE** tab, each month has a free-text **Deliverable** sub-row beneath it. Use it to describe — in one short sentence — what specifically ships that month for this feature.

### Why this matters

For features that span multiple months, the deliverable per month makes accountability explicit: "April = login API", "May = password-reset flow", "June = SSO". Stakeholders see what to expect when. Owners stay honest about scope.

Per-month status (Not Started / In Dev / Testing / Shipped / Blocked / On Hold) for the deliverable reuses the existing per-month Sprint Status dropdown above the deliverable text.

■ **Tip:** Every change to a deliverable goes through the cross-verification flow if both PM and Eng Lead are set. See the Cross-Verification section for details.



Monthly Status & FTE tab. 1 — sprint status dropdown for the month. 2 — one-line deliverable text for that month.

# Activities Checklist

Each feature has a per-feature checklist of activities (the **Activities** tab inside the modal). The checklist captures what work is needed alongside the build itself — PRD, Design, QE Testing, Sandbox Deployment, and so on.

## Predefined activities

- One-pager requirement doc
- Detailed PRD
- Design
- QE Testing
- Sandbox Deployment
- Release Notes
- PSG
- Internal Enablement
- GTM Enablement

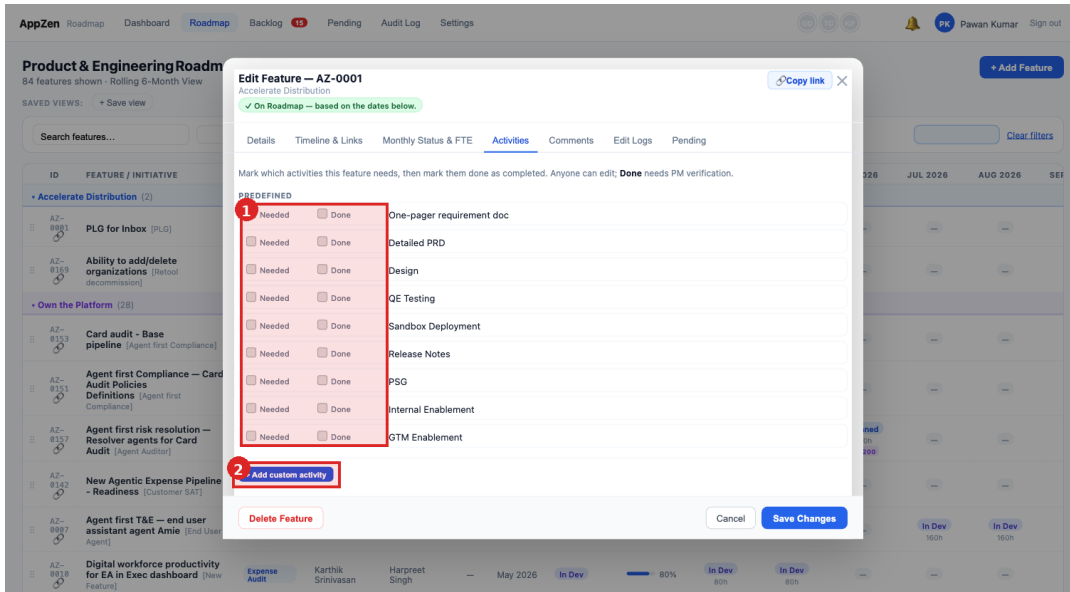
Each row has two checkboxes: **Needed** (does this feature require this activity?) and **Done** (has it been completed?). Anyone can edit either.

## Custom activities

Click **+ Add custom activity** at the bottom of the list to add your own ("Architecture review", "Customer beta", whatever fits). Custom activities are **implicitly required** — they show a ✓ *Required* tag instead of a Needed checkbox, since the act of adding one means it's needed.

## Done requires PM verification

When anyone other than the PM Owner ticks **Done**, that change enters the PM's pending verification queue. A small ■ *Done pending PM* chip appears next to the activity name until verified. PMs can verify individually or in bulk via the Pending tab.



Activities tab. 1 — Needed / Done columns for each predefined activity. 2 — + Add custom activity for anything outside the standard set.

# Comments and @mentions

The **Comments** tab inside a feature is the space for asynchronous discussion. Type in the compose box at the top and click Comment. Threading is one level deep (Slack-style flat thread): each top-level comment can have any number of replies, but replies don't themselves spawn nested replies — they continue the same flat thread.

## Reading and writing comments

1. Open any feature → click the **Comments** tab.
2. Top-level comments appear newest-first.
3. Each comment shows replies collapsed by default — click **Show N replies** to expand.
4. Use **Reply** on any comment to post into its thread. The reply form pre-fills with a "Replying to ..." hint.
5. **Edit** and **Delete** only appear on your own comments.

## @mentions

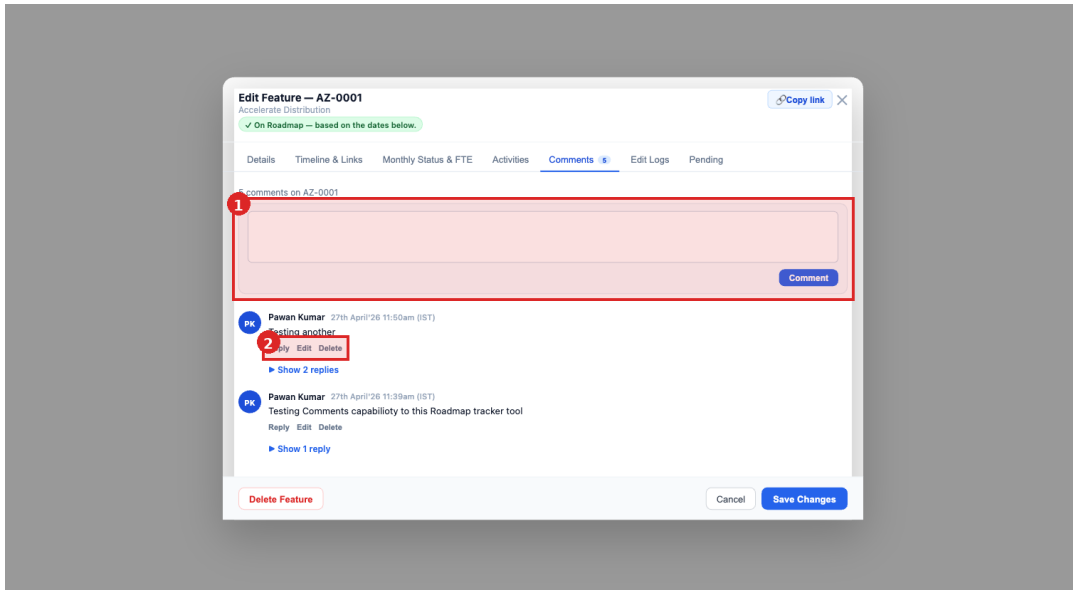
Type @ in the compose box, any reply textarea, or while editing a comment. A floating picker appears with up to 6 matching AppZen users. Use ↑/↓ to navigate, Enter or Tab to insert, Escape to dismiss.

When you mention someone:

- **In-app** — their bell-icon badge increments. Clicking the notification jumps them to the feature.
- **Email** — they get a notification email with the comment preview and a link to the feature.

Mentions render as a styled blue chip in the saved comment. Hover over a chip to see the user's full name + email.

■ **Tip:** If you @mention yourself, no notification fires — the system silently skips self-notifications.



Comments tab. 1 — compose box. Type @ to open the mention picker. 2 — Reply / Edit / Delete actions on each comment.

# Cross-Verification Workflow

When both PM Owner and Eng Lead are assigned to a feature, every field change requires verification by the *opposite* role:

- If the **PM** made the change → Eng Lead must verify.
- If the **Eng Lead** made the change → PM must verify.
- If a **third party** (e.g. ProdOps, admin) made the change → either PM or Eng Lead can verify.

Until verified, the changed value is shown live (the new value applies immediately) but is marked with a small *pending verification by [Name]* pill next to the field. The audit log carries the verification status for full traceability.

## How to verify

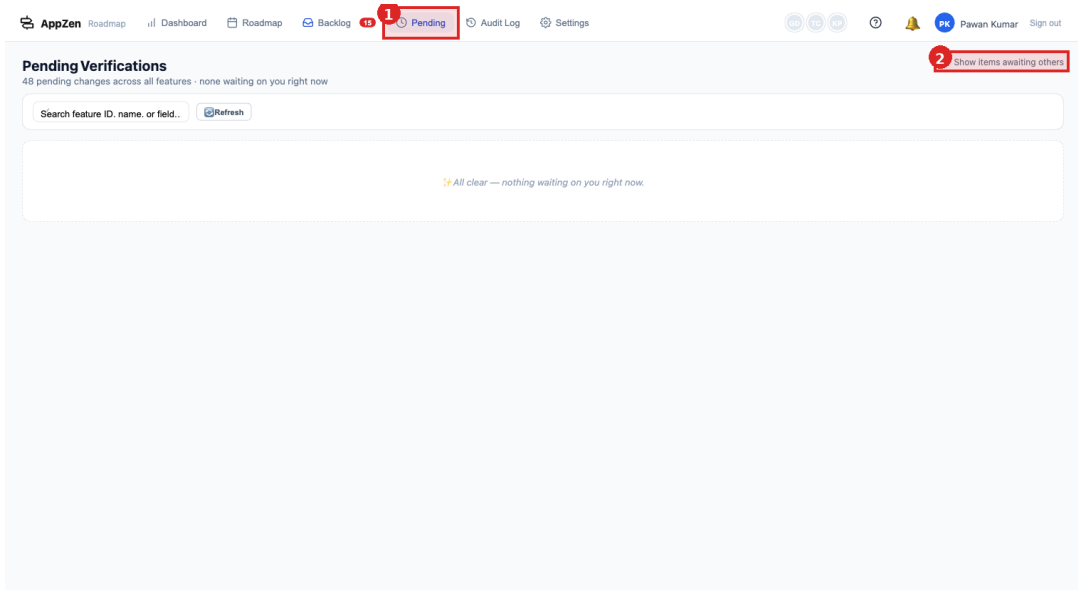
### Inside one feature

1. Open any feature with a yellow count badge on its **Pending** tab.
2. Click the Pending tab. Each row shows the field, old → new value, who changed it, and when.
3. Click ✓ **Verify** on any row to clear it individually.
4. Or use ✓ **Verify all eligible on this feature** to clear everything in one click.

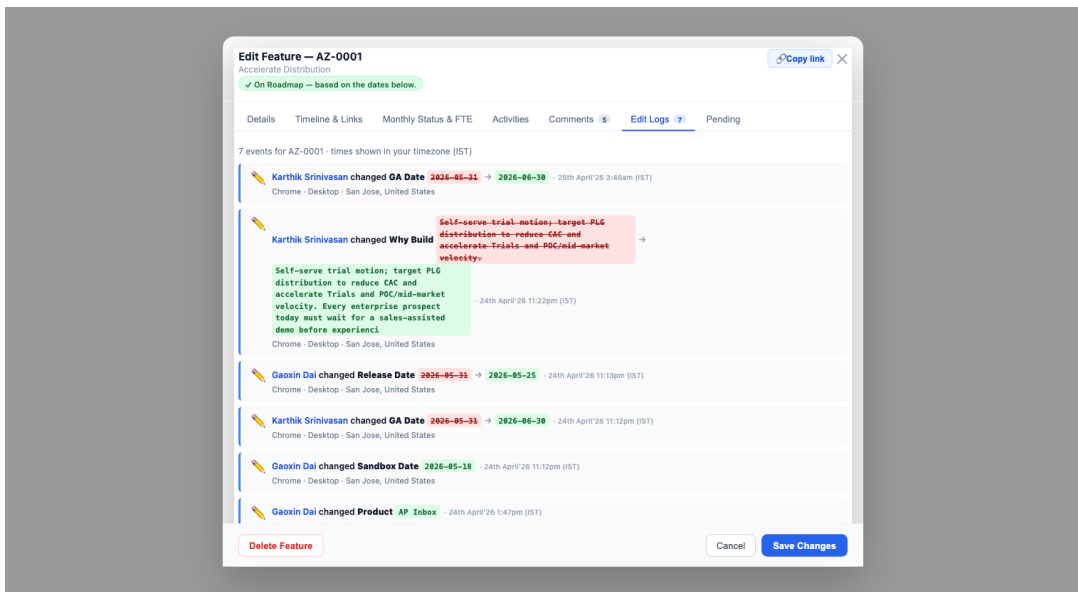
### Across all features

1. Click ■ **Pending** in the top nav (it shows a yellow count badge when you have items waiting on you).
2. The page lists every pending change across all features that you can verify.
3. Use ✓ **Verify all eligible (N)** at the top to clear the entire queue in one shot, or verify per row.
4. Toggle **Show items awaiting others** if you want to see what the rest of the team owes (read-only — you can't verify other people's queues).

■ **Tip:** Bulk imports, schema migrations, and similar non-user changes are marked as not requiring verification automatically (they don't clutter your queue).



Pending Verifications page. **1** — the top-nav **Pending** tab (yellow badge appears when items are waiting on you). **2** — toggle Show items awaiting others to see what the rest of the team owes.



Edit Logs tab inside a feature — every field-level diff with verification status.

# Scheduled Reports

Configure recurring email or Slack reports of the roadmap state. Useful for weekly stakeholder digests, daily standup status, or executive-level summaries.

## To create a report

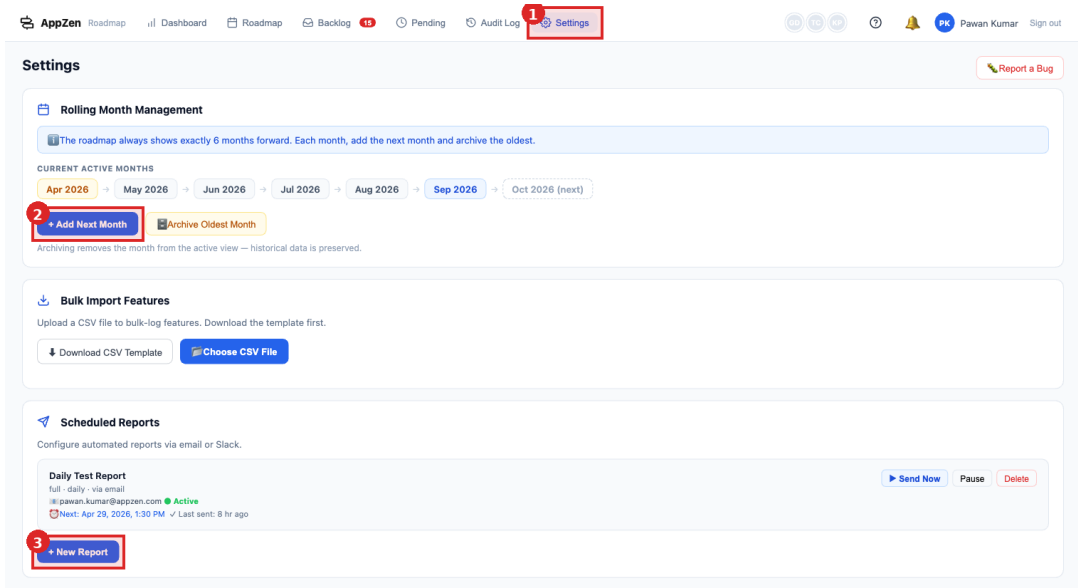
1. Go to **Settings** → **Scheduled Reports**.
2. Click **+ New Report**.
3. Give it a name (e.g. "Weekly Stakeholder Digest").
4. Choose **Format** — Summary by Pillar, Hard-Dates Only, or Full Feature List.
5. Choose **Frequency** — Daily, Weekly, Bi-weekly, or Monthly.
6. Choose **Channel** — Email (one or more @appzen.com addresses, comma-separated) or Slack (paste a webhook URL).
7. Click **Save**. The report card shows next-send time and last-sent time once it kicks off.

## Managing existing reports

Each report card has three actions:


- **Send Now** — fires an out-of-band send for testing.
- **Pause / Resume** — toggles whether the cron picks it up.
- **Delete** — removes the report (confirmation prompt).

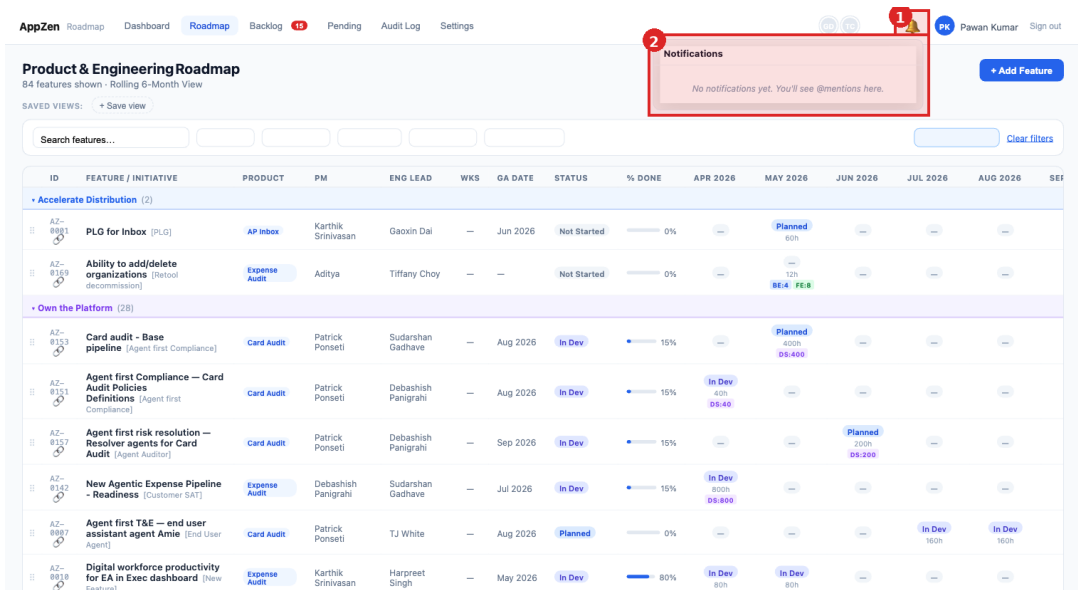
■ **Tip:** If a report email arrives empty, ask Pawan to verify the Edge Function deployment is current — empty bodies usually mean a schema-drift issue between the rendered template and the actual feature columns.



Settings page. 1 — Settings tab in nav. 2 — + Add Next Month (rolling-window management). 3 — + New Report for scheduled reports.

## Bell-icon Notifications

The  in the navbar fills with a red count badge when you have unread notifications. Click it to see the latest 30, with timezone-aware timestamps. Click any notification to jump to the relevant feature. Use **Mark all read** to clear the queue. Notifications auto-refresh every 60 seconds while the tab is open.



Notification dropdown. 1 — bell icon trigger. 2 — dropdown panel showing recent notifications (mentions, verification requests, replies).

# Settings overview

The Settings page consolidates configuration that applies to the whole tool. Each card is a separate concern:

## Rolling Month Management

Add or archive months in the active 6-month view. Adding a new month shows a confirmation reminding you that the dashboard is designed as a rolling window — coordinate with ProdOps before doing this, since it shifts what stakeholders see in the dashboard. Both add and archive actions are recorded in the Audit Log.

## Bulk Import Features

Download the CSV template, fill in feature rows, and upload to create many features at once. Useful for migrating data from the old Excel roadmap or seeding a new release plan. Each row goes through the same validation as creating one feature at a time.

## Email Diagnostics

Send a test email to your own inbox to verify the Edge Function + Resend integration is working. The diagnostic walks through each step (auth → reach function → Resend acceptance → message ID) and explains what to fix if any step fails.

## View History (Adoption Tracking)

Five toggleable line charts of usage over time:

- **Unique users** per period
- **Active hours** (sum of session durations)
- **Edits** (count of save actions)
- **Features created**
- **Features deleted**

Time bucketing auto-adapts: hourly for the last 2 days, daily up to 14 days, weekly up to 90 days, monthly beyond that.

## FTE Capacity Reference

Default monthly hours per engineering team (Hyrarn, Debashish, Rajeev). Click any value to edit; the change applies as the new global baseline.

## Skills by Team

Manage which skills belong to which team. Add a new skill via **+ Add skill**. Remove existing skills with the **X** — but removal is blocked if any feature still has hours assigned to that skill (the system tells you exactly how many hours across how many features need to be cleared first).

## Recently Deleted

Soft-deleted features stay here for 30 days, then auto-purge. Each row shows the days remaining; rows with 3 days left turn red as a final warning. Click **■ Restore** to bring back, or **✕ Delete now** to remove immediately.

# Tips and FAQ

## How do I share a link to a specific feature?

Click the ■ icon next to any feature ID on the Roadmap, or use the ■ **Copy link** button at the top of any feature's modal. The URL deep-links to the feature — opening it in a new tab pops the modal for that feature directly.

## Why does the dashboard show only 6 months?

By design — the rolling 6-month window keeps the view focused on near-term plans. Older data is preserved in the database for historical reporting; archive a month and add the next via Settings → Rolling Month Management when you're ready to roll the window forward.

## Some changes I made are showing as "pending verification" — what do I do?

That's the cross-verification flow at work. Your change is live, but the opposite role (PM or Eng Lead) needs to confirm it. Ping them in Slack or wait — they'll see it on their ■ **Pending** page.

## I'm seeing duplicate names in the PM/Eng Lead dropdown.

If you see both "Patrick" and "Patrick Ponseti" in the picker, always pick the longer canonical version. The system actively filters first-name-only forms when a longer canonical is available in the user directory; if duplicates persist, contact ProdOps so they can backfill via the SQL canonicalization tool.

## The page didn't load — "Could not load data" toast.

Refresh once. If it persists, sign out and sign back in (the menu is in your avatar dropdown top-right). The auth-token state can occasionally get stuck; a fresh sign-in always recovers it.

## Support

For bugs, click the small bug icon at the bottom-right of the screen and submit a report. For feature requests or workflow questions, message **Pawan Kumar** directly.

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*This guide is generated and bundled with the application. Latest version is always linked from the ■ Help icon in the navbar.*

# Slack Notifications

The Roadmap Tracker can DM you in Slack the moment a feature is added to or removed from the active roadmap, with all the metadata you need to react — who made the change, the feature's pillar / product / owners, target dates, and a one-click deep link back to the feature. Subscribe per-user from Settings; filter by pillar, product, or owner so you only hear about the work you care about.

## How to subscribe

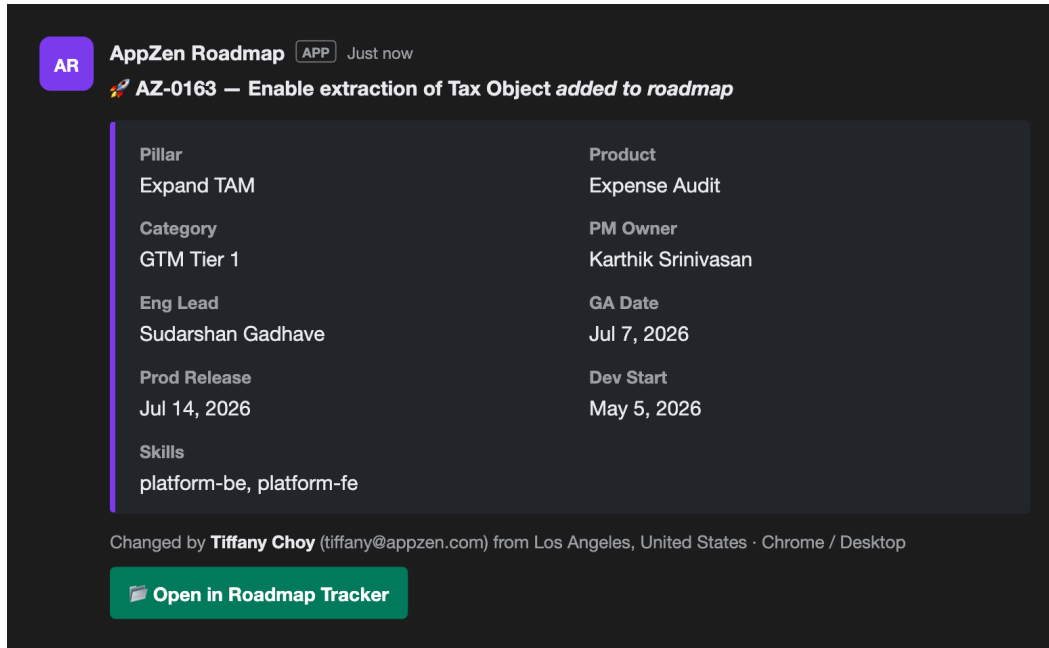
1. Open the tracker and go to **Settings**. Scroll past Scheduled Reports — the **Slack Notifications** card is the next section.
2. Paste your **Slack member ID** into the first field. To find it: in Slack, click your name → the three-dot **■** menu → **Copy member ID**. It always starts with the letter **U** (e.g. U06KFRCLXJN).
3. Tick the events you want notifications for. **Added** covers brand-new features that land directly on the roadmap and existing Backlog items that get promoted; **Removed** covers features moved back to Backlog.
4. Optionally narrow the firehose with the three filters. Leave any of them blank to match everything in that dimension. Filters are **AND-combined** — a notification fires only if the feature matches all non-blank filters.
5. Click **Save Subscription**. The status text on the right will switch to *Subscribed · last updated ....* Click **Send test DM** at any point to verify Slack delivery is wired up — the DM lands in your **AppZen Roadmap** app conversation within a couple of seconds.

The screenshot shows the 'Slack Notifications' settings form. At the top, it says 'Slack Notifications (per-user, real-time DMs)'. Below that is a description: 'Get a Slack DM from AppZen Roadmap the moment a feature is added to or removed from the roadmap. Includes who made the change, the feature's pillar/product/owners, target dates, and a deep link back to the feature.' The form contains several sections: 'YOUR SLACK MEMBER ID' with a text input field containing 'U06KFRCLXJN'; 'NOTIFY ME ABOUT' with two checked checkboxes: 'NEW FEATURE ADDED TO THE ROADMAP (OR MOVED FROM BACKLOG)' and 'FEATURE REMOVED FROM THE ROADMAP (MOVED TO BACKLOG)'; 'FILTER - PILLARS (blank = all)' and 'FILTER - PRODUCTS (blank = all)' with empty text input fields; 'FILTER - OWNERS (PM OR ENG LEAD) (comma-separated, blank = all)' with a text input field containing 'e.g. Patrick Ponseti, Tiffanv Chov'; and a 'Subscription active' checkbox which is checked. At the bottom, there are three buttons: 'Save Subscription' (blue), 'Send test DM' (grey), and 'Unsubscribe' (red). On the right side, the status is 'Subscribed · last updated 29/04/2026, 04:00:47'.

**Settings** → **Slack Notifications**. *Box 1* — your Slack member ID. *Box 2* — event-type toggles. *Box 3* — optional pillar/product/owner filters. *Box 4* — Save. *Box 5* — Send test DM (great for confirming the bot reaches you before relying on it).

## What the Slack DM looks like

When a feature crosses the Backlog↔Roadmap boundary, the AppZen Roadmap bot sends each matching subscriber a structured Block Kit message. The headline names the feature and the verb (added / removed); a card body lists the metadata in two columns; a one-line context note says who made the change and from where; and a green button deep-links to the feature modal in the tracker.



**Example Slack DM.** AppZen Roadmap bot, AZ-0163 added to the roadmap. Pillar / Product / Category / PM Owner / Eng Lead / GA Date / Prod Release / Dev Start / Skills shown as labelled fields. The grey context line under the card carries the editor's name, email, location, and browser. **Open in Roadmap Tracker** deep-links straight to the feature modal.

## Tuning what you receive

The dashboard handles > 75 features at any given time and can move several per day during a planning cycle. The filters exist precisely so the channel doesn't become noise:

- **Filter — Pillars** — pick one or more (Cmd / Ctrl-click). Subscribers to a single pillar typically pick just their own (*Own the Platform, AI Agent Studio, etc.*).
- **Filter — Products** — narrow by product line (*Card Audit, Expense Audit, AP Inbox, etc.*). A feature can list multiple products; the filter matches if *any* of them is in your list.
- **Filter — Owners** — comma-separated list of names. Matches on either PM Owner or Eng Lead. Useful for managers who want to see only the work moving for their direct reports.

## Pausing without losing your filters

Going on PTO or just need a quiet week? Uncheck **Subscription active** and click Save. Your filters are preserved on the row; re-checking the box and saving turns notifications back on without re-entering anything. To delete the row entirely, use the red **Unsubscribe** button.

■ *Tip: Notifications fire only on actual transitions. Routine status edits (Planned → In Dev), monthly hour adjustments, and other in-flight changes do not trigger DMs — only the moment a feature crosses the Backlog↔Roadmap boundary or is created on the roadmap.*

## What's next: Slack-delivered scheduled reports

Scheduled Reports (the section directly above Slack Notifications in Settings) currently delivers via email and Slack webhook. The next iteration adds two more delivery channels:

- **Slack DM (via AppZen Roadmap bot)** — for personal digests. Same format and frequency, delivered to your Slack inbox instead of email.
- **Slack Channel (via AppZen Roadmap bot)** — for team digests. The report lands as a thread-friendly post in a channel of your choice. The AppZen Roadmap bot must be invited to the channel first.

Both options are visible in the Delivery Channel dropdown today and persist the channel/user IDs you enter, but the actual delivery still goes via email until the corresponding edge-function update ships. A short-lived note next to those options confirms the in-flight state.

## Coming later: configure from inside Slack

A future release will add slash commands so you can manage your subscription without leaving Slack:

- **/roadmap subscribe** — opens an interactive Block Kit modal to set or change your filters.
- **/roadmap unsubscribe** — stop receiving DMs (with confirmation).
- **/roadmap status** — ephemeral message showing your current subscription summary.

Until then, the Settings card in the web app is the source of truth — whatever you save there decides what your Slack DMs look like.

## Troubleshooting

**I clicked Send test DM but nothing arrived.** Three checks: (1) Confirm your Slack member ID is correct (it must start with **U**, not **D** — D-prefixed IDs are channels). (2) Confirm the AppZen Roadmap bot exists in your workspace — search Slack for it; if it doesn't show up, ProdOps hasn't installed the bot for you yet. (3) If the test still fails, ProdOps may not have deployed the `notify-roadmap-event` edge function or set its secrets — message Pawan.

**I'm getting too many notifications.** Add filters. Most users only want to see their own pillar and team's work; setting one pillar and one or two products typically cuts the volume by 80%.

**The DM links say "feature not found".** The feature was probably soft-deleted after the notification fired. Look in Settings → Recently Deleted to restore it (within 30 days), or accept that the row is gone and ignore the dead link.

# How Health is Calculated

Every feature on the Roadmap shows a Health badge — **On Track**, **At Risk**, or **Delayed**. The badge isn't stored anywhere; the system computes it live every time a page renders, comparing where the feature *should* be against where the % Complete slider says it actually is. There's no machine-learning, no external signal, no Jira-hookup magic — it's pure schedule-vs-progress arithmetic. This page documents the exact algorithm so PMs and Eng Leads know how to move the badge in either direction.

## Inputs (per feature)

- **Dev Start** — when work begins (Timeline & Links tab in the feature modal).
- **GA Date** — when work is targeted for general availability. If GA is blank, the system falls back to **Prod Release Date**.
- **% Complete** — manually-entered slider on the Details tab (0–100). This is the *only* progress signal.

## Algorithm

```

if Dev Start is missing, OR (GA AND Prod Release are both missing):
    health = none (-)    // no schedule to compare against

if today >= end_date:    // end_date = GA, fallback Prod Release
    if % Complete >= 100 → on-track    (shipped on time)
    else                    → late      (overdue, not done)

if today < Dev Start:
    health = none (-)    // not yet kicked off

else:
    expected_pct = 100 × (today - Dev Start) / (end_date - Dev Start)
    gap          = expected_pct - % Complete
    gap ≤ 10    → on-track    (within 10% of where we should be)
    gap ≤ 25    → at-risk     (between 10% and 25% behind)
    gap > 25    → late        (more than 25% behind)
  
```

## Worked example

*Dev Start = Mar 1, GA = Sep 1, today = Apr 29. 33% of the timeline has elapsed.*

% Complete	Expected	Gap	Health
30	33	3	✓ On Track
18	33	15	■ At Risk
5	33	28	■ Delayed

0	33	33	■ Delayed
100	33	-67	✓ On Track (capped)

## Gotchas

- **% Complete is the only progress signal.** If every monthly status is set to *Shipped* but the slider was never moved past 0, Health still shows **Delayed**. Owners should bump the slider as work lands — the Monthly Status grid and the % Complete slider are independent, and Health only reads the latter.
- **Backlog items show no health.** By definition they have no Dev Start / GA / Prod Release dates, so the algorithm returns *none*. They appear with a — in any Health column.
- **Health filter on Scheduled Reports excludes *none* features.** When a Slack report has its Health filter set to On Track / At Risk / Delayed, features without a computable Health (missing dates, or before Dev Start) drop out. This is intentional — the user is asking for health-status-specific output.
- **Hard Release flag does not affect Health.** A hard-release feature past its GA date with % Complete < 100 is **Delayed**, same as any other feature. The flag is purely a 'do not slip' annotation for stakeholders — the algorithm doesn't read it.
- **Time zones don't matter.** The comparison uses millisecond timestamps, not local-date arithmetic, so a feature with GA = today behaves identically whether the viewer is in PST or IST.

■ *Tip: This same explanation is available inside the app at **Settings** → **How Health is Calculated**, and via the small (i) icon next to any Health column header. The algorithm in this guide and the code in `getHealth()` are kept in lock-step by convention — when one moves, the other moves in the same diff.*