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# Roadmap Management— OOTB Introduction

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# Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

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# Purpose of Roadmaps

Roadmaps allow organizations to maximize the value of initiatives and minimize risks by prioritizing and selecting investments that most closely align with corporate goals and realize estimated cost and ROI

- Roadmaps help organizations achieve one or more organizational strategies

- May consist of past, current, and planned or future components

- Potentially longer term, with new investments rotating into the Roadmap

- An organization likely has many Roadmaps, each addressing unique organizational needs

- Roadmaps may contain Ideas, Projects and custom Investments. No Programs or NPIOs

**NPIO –** Non Project Investment Object (Applications, Assets, Products, Other Work, Ideas and Services)



Roadmap

Ideas

Projects

Custom Investments

Programs

NPIOs

# Portfolios vs Roadmaps

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Let Rego be your guide.

# Roadmaps vs. Portfolios – General

| | Classic | 15.5.0 | 15.5.1 | 15.6 | 15.6.1 | 15.7 |
|---|---|---|---|---|---|---|
| | Portfolios | Roadmaps | | | | |
| Can include Projects | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Can include Programs | ✔ | | | | | |
| Can include OOTB Ideas | ✔ | | | ✔ | ✔ | ✔ |
| Can include NPIOs | ✔ | | | | | |
| Can include Custom Investments (New UX Only) | | | ✔ | | | |
| Can add items by OBS | ✔ | ✔ | ✔ | ✔ | ✔ | |
| Can add items by Name | ✔ | ✔ | ✔ | ✔ | ✔ | |
| Can add items using other filter criteria (e.g., Manager, Power Filter, etc.) | ✔ | | | | | |
| Can manually add/include items that don't exist elsewhere in Clarity PPM | | | | ✔ | | |
| Can sync data from Investments – OOTB Fields | ✔ | Financials, Dates, Availability only | | | | |
| Can sync data from Investments – Custom Fields | ✔ | | | ✔ *known defect | ✔ | ✔ |
| Can associate with OBS, and use OBS for Security | ✔ | | | ✔ | ✔ | ✔ |
| Can schedule Sync of included items, instead of having to sync manually to update Investment data | ✔ | | | | | |
| Will continue to be enhanced in future Clarity PPM Releases | | | | ✔ | | |

# Roadmaps vs. Portfolios– Analysis

| | Classic | 15.5.0 | 15.5.1 | 15.6 | 15.6.1 | 15.7 |
|---|---|---|---|---|---|---|
| | Portfolios | Roadmaps | | | | |
| Supports analysis using Fiscal Time periods | | | | ✔ | | |
| Can set Targets | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Can distribute targets as desired across time horizon | ✔ | | | | | |
| Can delineate between Targets (do not exceed) and Goals (target to hit, e.g., Benefits) | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Includes Waterlining functionality | ✔ | ✔ Via Targets/In Plan checkbox | | | | |
| Can create and save scenarios | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Can create different views | | | | ✔ | | |
| Provides a Grid View | ✔ | | | ✔ | ✔ | ✔ |
| Provides a Timeline View | ✔ | | | ✔ | ✔ | ✔ |
| Provides a Board View | | | | ✔ | | |
| Includes Ranking Rules | ✔ | | | | | |
| Can analyze by individual/specific roles | ✔ | | | | | |
| Can group and utilize color to analyze data | | | | ✔ | | |
| Can make modifications to Investment data within the Roadmap/portfolio (e.g., Dates, financials, etc.) | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Can push the above changes back to the underlying Investment | | | | | | |
| Additional OOTB Reporting on data – Portlets, reports, etc. | ✔ | | | Some light reporting | | |

# Data Used in Roadmaps

- Roadmaps use:
  - Investment Data
  - Planned Costs (simple budget or cost plans)
  - Resource Demand (allocations)

- Minimum data needed:
  - Simple: Investment Data - Simple grouping of projects
  - Medium: Grouping of projects with either planned cost or resource data
  - High: Project, financial and team data to provide a deep-drive into what is/is not possible from a resource, timeline and cost perspective



### Key Takeaways

✓ There are different levels of complexity when tracking planned cost within a project.

✓ The Roadmap will report on team allocations and will not utilize ETCs for resource demand within Roadmaps

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# Roadmap Structure

- Roadmaps are made up of two objects:
  - Roadmap: The overall object that contains properties for the roadmap as a whole
  - Roadmap Item: The structure and properties of the individual items (Projects, Custom Investments) added to the Roadmap
- Both objects are maintained in Classic CA PPM

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Roadmap Security & Licensing

# Roadmap Security Rights

- Administrators must determine which rights to grant users.

- Note that the Author right gives resources the ability to delete.

| | Access Right ▲ | Description |
|---|---|---|
| ☐ | Roadmap - Author - All | Allows the Roadmap Author to view, edit and delete the Roadmap and manage roadmap-specific picklists in the new user experience. |
| ☐ | Roadmap - Create | Allows user to create Roadmaps in the new user experience. The creator of the Roadmap automatically becomes the Author and can edit or delete the Roadmap. |
| ☐ | Roadmap - Delete - All | Allows user to view and delete all Roadmaps in the new user experience. |
| ☐ | Roadmap - Edit - All | Allows user to view and edit all Roadmaps and manage roadmap-specific picklists in the new user experience. |
| ☐ | Roadmap - Navigate | Allows user access to the Roadmap pages in the new user experience. The user will only be able to view information for Roadmaps to which the user has access. |
| ☐ | Roadmap - View - All | Allows user to view all Roadmaps in the new user experience. |

- Beginning in 15.6, Roadmaps may be associated to an OBS, and administrators may grant OBS-level access to roadmaps.
  - This topic is covered in the next section.

# Roadmap Security Rights (2)

- Naming someone the Roadmap Author will grant them instance Author rights to that Roadmap.

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Creating and Populating
Roadmaps

# Creating Roadmaps

- Users with the proper rights may create new roadmaps

# Creating Roadmaps

- When creating a new roadmap, you will identify the properties of the roadmap, including the time horizon (duration) to be included

- In order to have your roadmap cover fiscal periods in the future, those fiscal periods must be set up in Clarity.

- Roadmap duration options are limited to the fiscal periods set up in your environment. For instance if you set 2020 as your start period, and you only have fiscal periods going out through 2022, the only available duration options will be 1 year or 2 years.



- As with classic Portfolios, the roadmap duration can limit the data that will be viewable in the roadmap for carryover/multi-year projects, and for projects that fall outside the Roadmap's time horizon

# Populating Roadmap

- There are 3 ways to populate Roadmap Items into a Roadmap
    1. Import from PPM (Ideas, Projects or Custom Investments)
    2. Import from .csv
    3. Create Manually

# Import from PPM

- The *Import from PPM* option will allow you to add to the roadmap Ideas, Projects (not programs!) and Custom Investments that already exist in PPM.
  - Remember – *Custom Investments* are the new, New UX only, items that you may create in your environment
- The options listed in the training environment are *Marketing Plans, Ideas* and *Projects*, because we've created a Custom Investment Object named *Marketing Plans* in this environment. Your list would include whatever Custom Investments you have created.

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# Choose What to Import

- You may Import items by OBS or individually (or both).

- Depending on your environment, import / sync may take a few minutes

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# Contents will begin to Import

- Upon making your selection, the contents will begin to import to the Roadmap.

# What Is Imported/Synced

- These attributes are imported/synced to the Roadmap, and may be analyzed within the Roadmap
- Sync of custom attributes is covered in the next section

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Sync of Roadmap Data

# Ongoing Roadmap Sync

- On an ongoing basis, you will want to sync your Roadmap to ensure the linked items are always displaying the most current/recent information.

- At this point in time, there is no sync job/process. Roadmaps must be manually synced.

- It is best practice to sync your roadmap each time you access it.

# Ongoing Roadmap Sync (2)

- Sync everything, or only sync specific attributes.

# Sync Custom Attributes into Roadmaps (1)

- If necessary, you may sync custom lookup attributes from Projects, Ideas, or Custom Investments into the Roadmap.

- Create a lookup attribute on the Project, Idea or Custom Investment attribute, then create the matching attribute on the Roadmap Item object.

- Ensure the type API Attribute IDs match on both attributes, and that they're both using the same Data type/lookup.

# Sync Custom Attributes into Roadmaps (2)

- When you sync custom attributes, the information from the Idea, Project or Custom Investment will sync to the Roadmap.

- The Sync functionality does NOT run on initial import. You will have to add (import) the Idea, Project or Custom Investment to the Roadmap first, then run the *Sync Matching Custom Attributes* functionality.

# Board View Overview

- The Board View allows for the update and grouping of roadmap items according to different values.

- Use the *Settings* selection to determine which value should be used for the groupings.

# Show/Hide Columns

- Use the *Columns* chooser to show/hide columns, if necessary.
- Clicking the *Edit* option would allow you to edit the picklist.

# Drag and Drop the Roadmap Items

- Drag and drop the roadmap items to the desired columns to update the values.

# Color By

- If desired, set a color by value. You can choose the same value as your columns, or a different value. A legend will display at the bottom indicating what the items are colored by.

# Colors Appear in Other Views

- If you utilize a color for the attributes in your custom picklist (also works for Global Picklists), that coloring will also be able to be viewed in the other roadmap views.

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Roadmap Views:
Timeline View

# Timeline View Settings

- Click to access the settings in the *Timeline* view.

- If desired, update the *Zoom* and *Periods* display values.

# Swimlanes and Color By

- Update the *Swimlanes* and *Color By* values to group and color data on the Timeline View.

# Metrics

- In the *Settings* menu, select up to 3 metrics that may be displayed directly on the Timeline bars.

- A grid will appear at the bottom of the page indicating what each value represents.

# Metrics (2)

- Metrics will display on each bar, and will sum for each swimlane.

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# Grid View Settings

- Click the *Settings* button to access the Grid View Settings.

- Update the decimal display for Money and numbers if necessary.

- Check the *Clip Metrics to Roadmap Dates* option if you want the data in the roadmap to be constrained to the dates set for the Roadmap. Uncheck to include all data for all included Projects and Custom Investments.

- The other options will be covered later.

# Grid View

- Use the Grid View to manage Roadmap data elements.

- Begin by using the column chooser to add fields to view.

# Select Fields

- Select the fields you wish to see in view.

- Use the column chooser to add totals for Cost and Capacity Fields.

- Per Period metrics may be added in later, via a separate menu.

- Custom Roadmap Item attributes will be available to be selected, as long as they are API Attribute enabled.

# Add Per Period Metrics

- If desired, you may add per period metrics to the view using the *Settings* menu.

# Per Period Metrics

- Depending on what the *Periods* is set to, you will then see data for those periods in the grid view

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Roadmap Targets

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# Roadmap Targets

- Roadmap Targets provide functionality similar to Portfolio Waterlines. You can set targets / thresholds (financial, resource, etc.), and determine which roadmap items, when included, allow you to remain within those thresholds.

- Access the settings menu to turn on targets.

- Choose which targets to display.

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# Set Target Values

- Now that the targets are displayed, set the values for each by clicking the edit button.

- Repeat for the remaining Targets

- Note that the "total" value will not automatically populate with the sum of, for example, the Operating and Capital. You will have to manually set each value.

- Note: Targets will be saved with the view, so re-save as necessary.

# In Plan

- Now that the targets are set, begin determining which investments are *In Plan* by checking the checkbox.

- As items are checked, the measure against the targets will increase.

- When a target is exceeded, the target will turn red.

# Targets as Goals

- For some Targets, the metric is not necessarily a value you're looking to remain within, but instead a threshold or goal you're looking to hit. An example of this would be *Benefit*. When you achieve the benefit target, you're not "red" or "over budget," but instead, you've hit your target.

- For these metrics, you can set the Target as a goal by clicking the up arrow.

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# Targets as Goals (2)

- Instead of turning from green to red when met, goals will turn from blue to green.

**Benefit** ⬆

| | |
|---|---|
| TARGET | 500,000 |
| IN PLAN | 0 |
| VARIANCE | 500,000 |

**Indicates this is a goal**

**Benefit** ⬆

| | |
|---|---|
| TARGET | 500,000 |
| IN PLAN | 300,000 |
| VARIANCE | 200,000 |

**Benefit** ✓

| | |
|---|---|
| TARGET | 500,000 |
| IN PLAN | 531,000 |
| VARIANCE | ( 31,000 ) |

Questions?

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# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCRs** button under the **Report PDUs**
- Click on **Report PDUs**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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