

Roadmaps in the New UX

Your Guides: Jen Scarlato & Ross Hensel

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



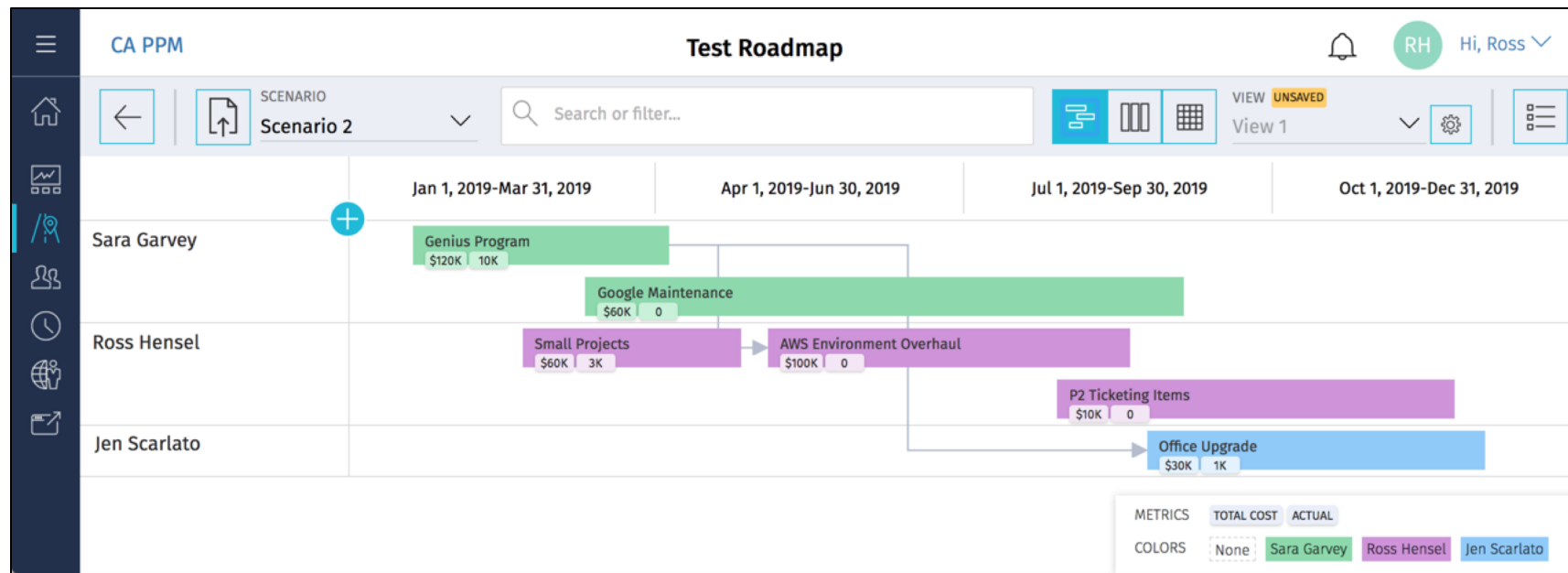
Agenda

- Roadmap Overview
 - Prerequisites
- Creating a Roadmap
 - Creating a Roadmap within CA PPM
 - Importing a Roadmap
 - Roadmap Items
 - Dependencies
 - Roadmap Options
- Picklists, Views and Scenarios
 - Global Picklists
 - Local Picklists
 - Views
 - Scenarios

Roadmap Overview

What is a Roadmap?

- Provide portfolio managers with top-down planning for the launch of new products, services, applications or other company investments.
- Utilize the fields within Roadmaps to categorize items as in plan, status, rank, etc



Roadmapping Prerequisites

- ✓ Create a default entity
- ✓ Configure Monthly, Quarterly and Annual fiscal time periods within that entity
- ✓ Create custom global picklists for grouping attributes
- ✓ Configure color display mappings
- ✓ Provide Roadmap access rights

Roadmapping Overview (1)

- Two new objects introduced in 15.4
 - Roadmap
 - Roadmap Item
- Objects are only viewable in New UX, but can only be configured in Classic UX
- Replacement for Portfolios in New UX

Objects

Object Name: Description:

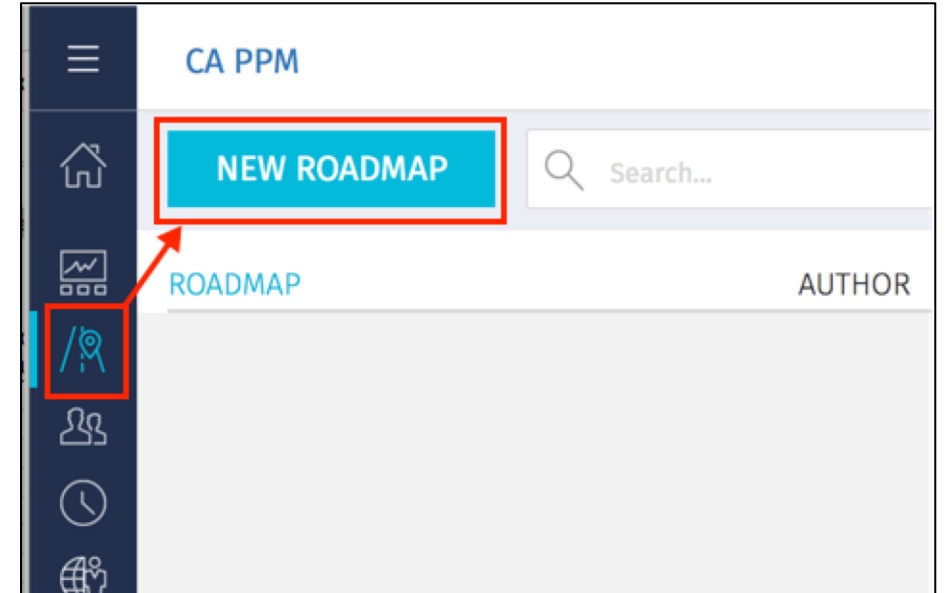
Object ID:

Master Object:

Data Warehouse: Abstract Object:

Data Warehouse Trending:

<input type="checkbox"/>	Object ▲	ID	Description	Master Object	Partition Model	Event Enabled	Data Warehouse
<input type="checkbox"/>	Roadmap	rdm_roadmap	The Roadmap Object				✓
<input type="checkbox"/>	Roadmap Item	rdm_roadmap_item	The Roadmap Item Object	Roadmap			✓



Roadmapping Overview (2)

- **Roadmaps are not tied to Projects, Ideas, etc, and can not be synchronized with Projects/Ideas – they are entirely separate objects.**
- Fiscal Period based – based on system base entity
- Supports view by yearly, monthly and quarterly fiscal periods.
- Can change zoom level and periods
- Can change what swim lanes are organized by – stakeholder, outcome, etc.
- Can import data from CSV to Roadmap

Creating a Roadmap

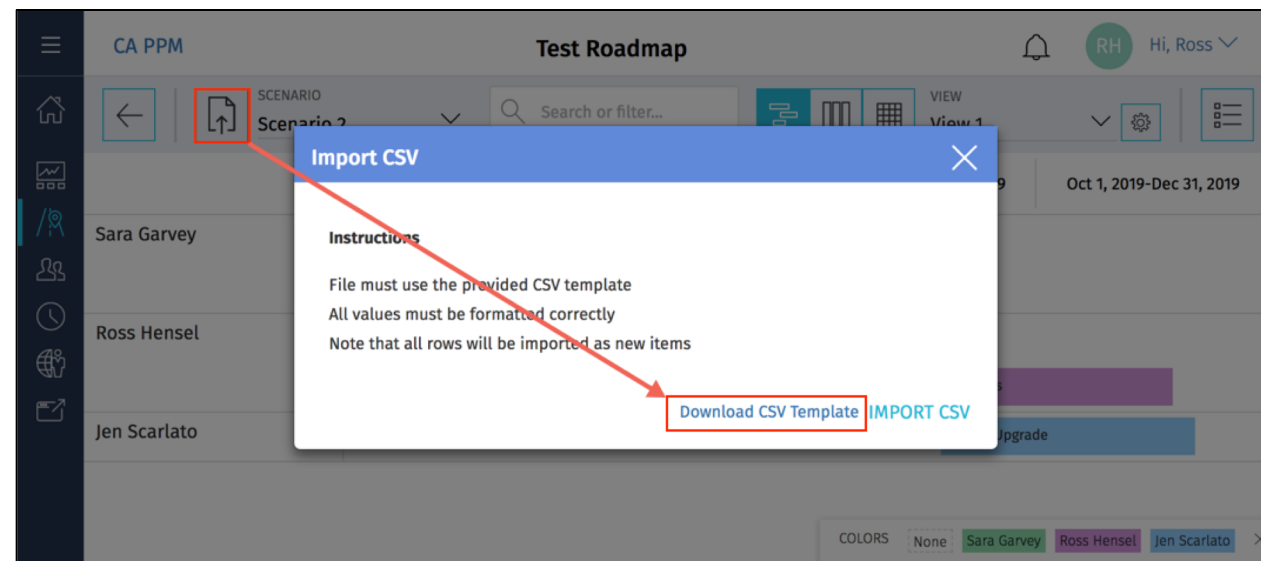
Create New Roadmap

- Set Roadmap:
 - Name
 - Start Period (typically, roadmaps would be created for the coming year)
 - Duration

The screenshot shows a web interface for creating a new roadmap. At the top left is a blue button labeled 'NEW ROADMAP'. To its right is a search bar with a magnifying glass icon and the text 'Search...'. Below these is a form with a red border. Inside the form, the first field is labeled 'NAME *' and contains the text 'Test Roadmap'. Below this are two fields: 'START PERIOD *' with the value 'Jan 1, 2019-Dec 31, 2019 (Next Period)' and a dropdown arrow, and 'DURATION *' with the value '1 Year' and a dropdown arrow. At the bottom right of the form are two buttons: 'CANCEL' and 'CREATE'. The 'CREATE' button is highlighted with a red border. Below the form, the text 'Create a new roadmap.' is visible.

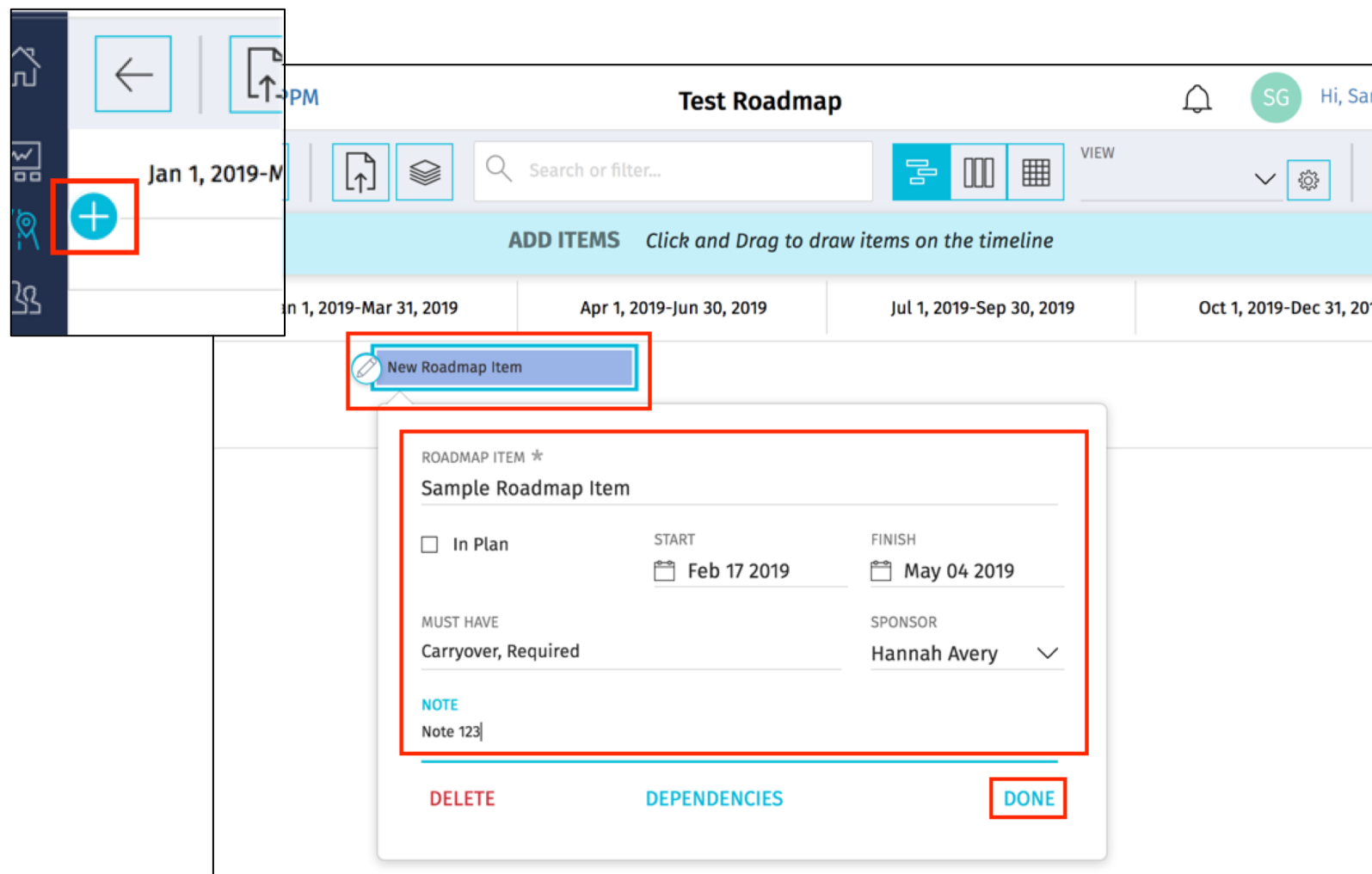
Import Roadmap from CSV

- Download the template within the roadmap itself by clicking on the *Import CSV* option
- Once the template is downloaded, a sample row display how the data should be entered
- 250 items are supported within the import and the file will be imported to the specific scenario selected
- The API Attribute ID is the column heading. Populate a new column header with the API Attribute ID if you need to add in custom fields to your import



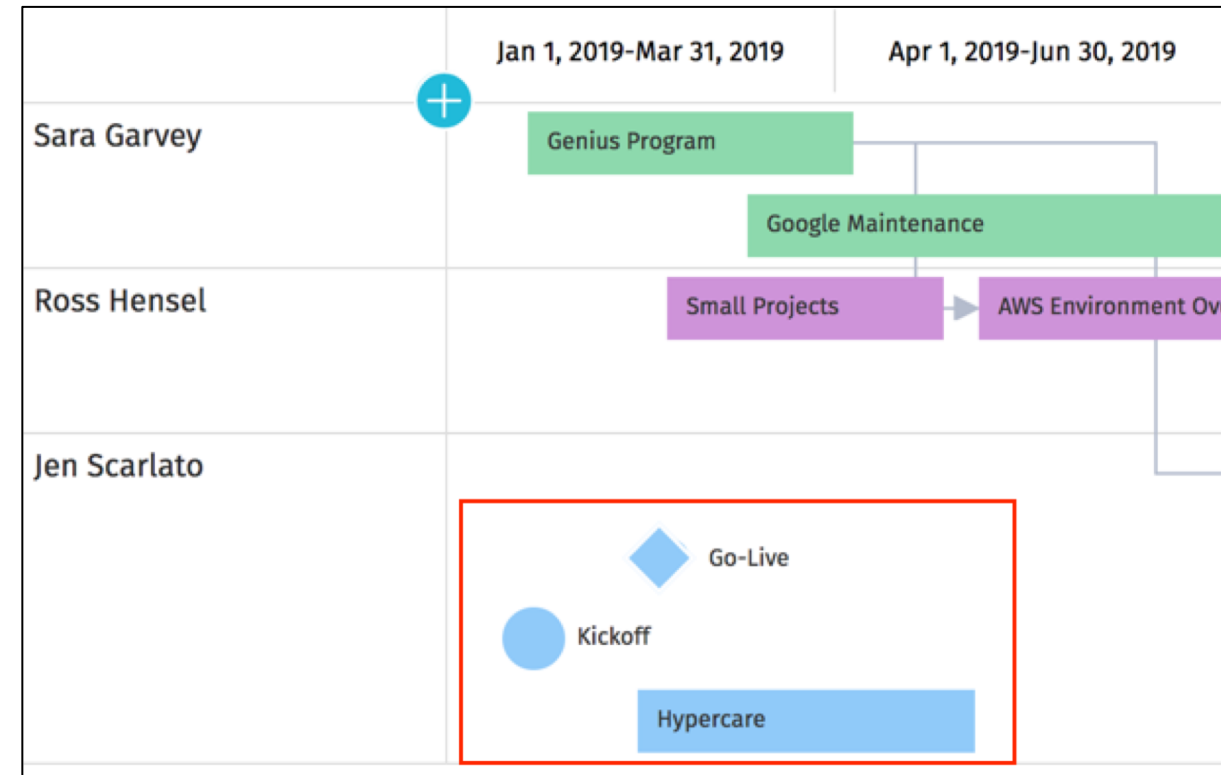
Create New Roadmap Item

- Click the plus in the upper left, then click and drag to create new items on the roadmap
- The amount the roadmap item is “stretched” is relative to the duration





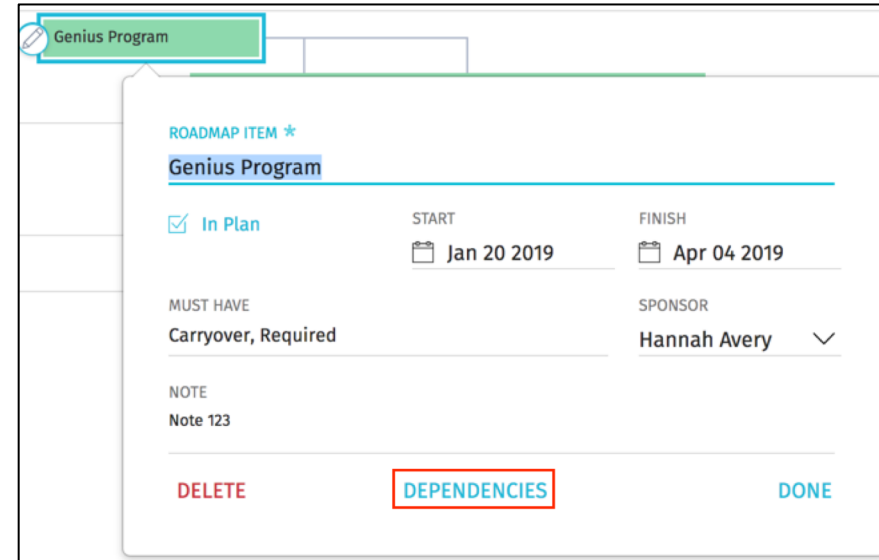
Roadmap Items

- Three different roadmap items are available:
 - A roadmap item with no start date appears as a diamond
 - A roadmap item with no finish date appears as an open circle
 - If the item has both start and finish dates, then it will appear as long as the duration has been identified in the properties



Dependencies

- Items within the roadmap may have dependencies and show those dependencies similar to the Gantt
- Within the roadmap item's settings screen, click *Dependencies*
- Once selected, select  to create a new dependency or  to remove a dependency



Genius Program

ROADMAP ITEM *

Genius Program

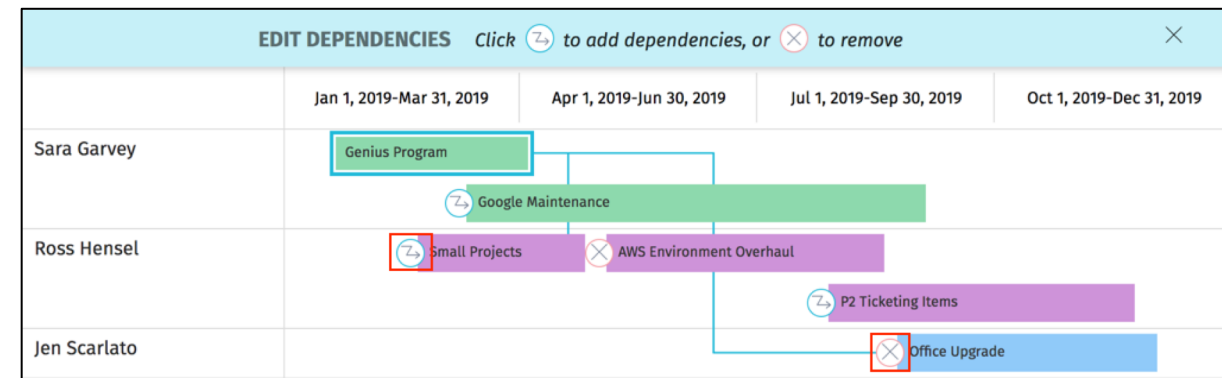
☒ In Plan

START Jan 20 2019 FINISH Apr 04 2019

MUST HAVE Carryover, Required SPONSOR Hannah Avery

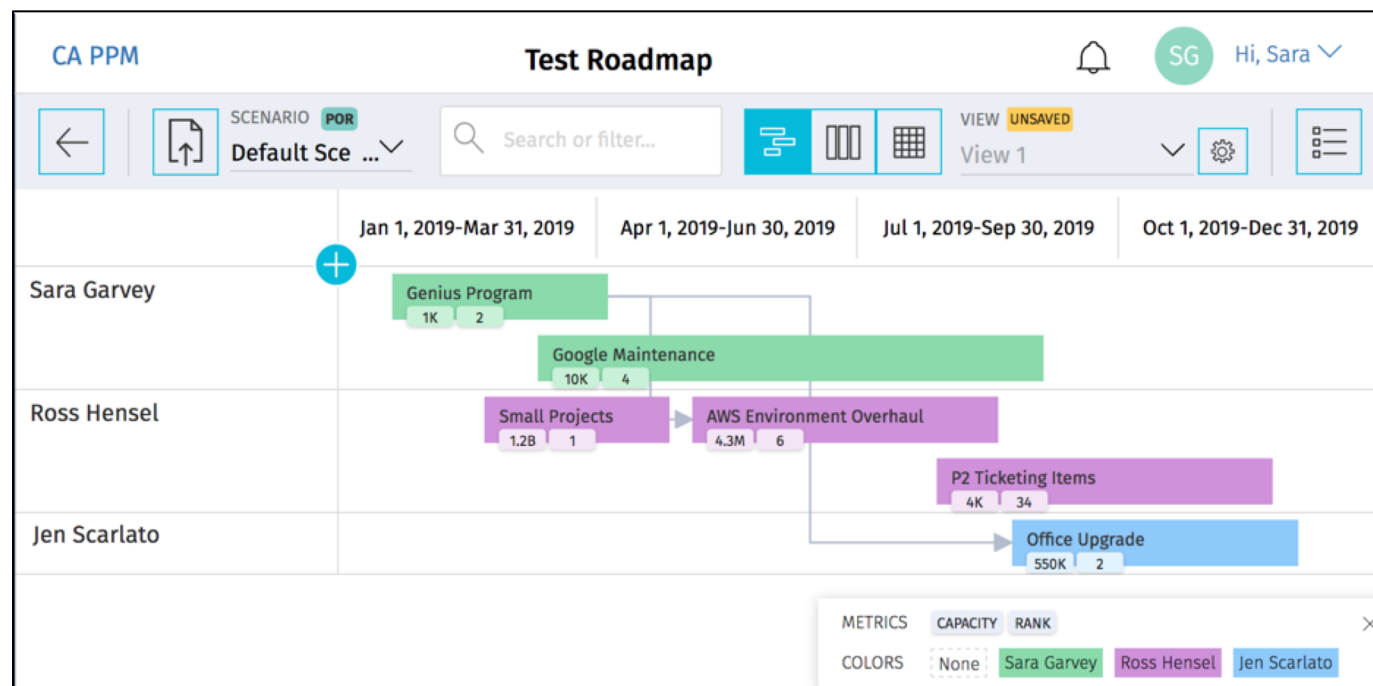
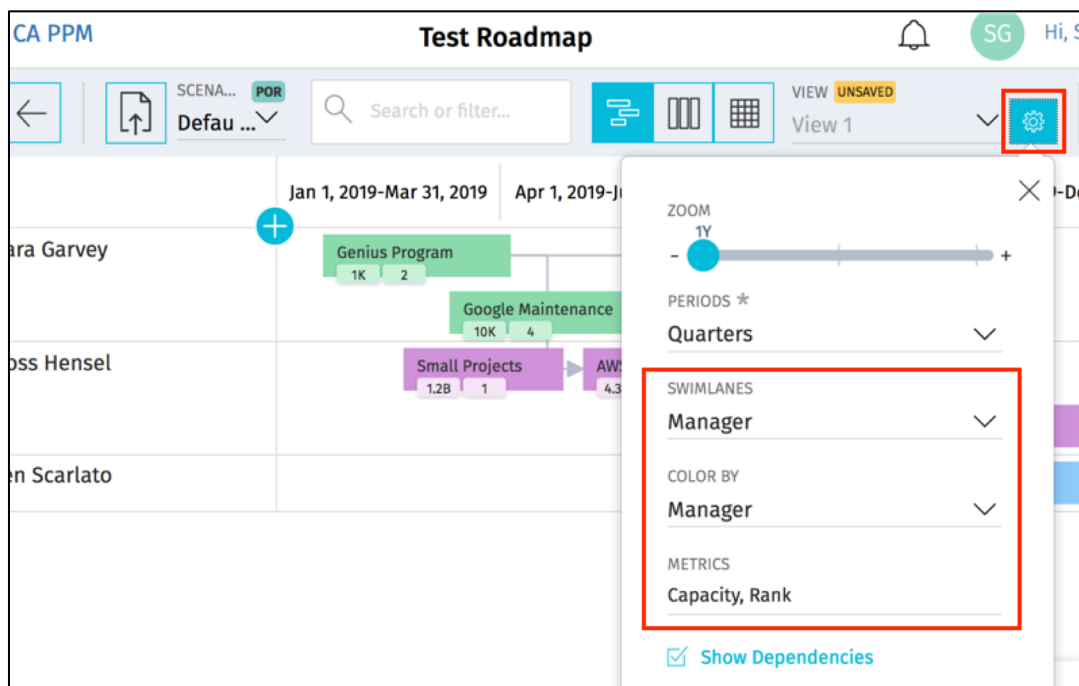
NOTE Note 123

DELETE DEPENDENCIES DONE



Roadmap Options

- Can add groupings, swimlanes, coloring and metrics
 - Metrics display on gantt bars, and can only be number/money fields
 - Up to three metrics may be selected on the gantt. Full metrics are available in the grid layout



Picklists, Views and Scenarios

Configure Default Global Picklists

- Three picklists are available out of the box with roadmaps:
 - Status:** contains the values for the Status attribute (approved, unapproved, etc)
 - Type:** contains the lookups for the Type attribute (Idea, Project, etc)
 - In Plan:** System restricted. Cannot be customized to add new values, but you can change the display colors and label names.
- Within the values within the Roadmap object in Classic PPM, you can:
 - Adjust the order of the values in the list
 - Rename or add values
 - Adjust the color mappings

Objects

Object Name: Description:

Object ID:

Master Object:

Data Warehouse: Abstract Object:

Data Warehouse Trending:

<input type="checkbox"/>	Object	ID	Description	Master Object	Partition Model	Event Enabled	Data Warehouse	Data Warehouse Trending
<input type="checkbox"/>	Roadmap	rdm_roadmap	The Roadmap Object				✓	
<input type="checkbox"/>	Roadmap Item	rdm_roadmap_item	The Roadmap Item Object	Roadmap			✓	

Displaying 1 - 2 of 2

Properties	Attributes	Linking	Actions	Views	Audit Trail	Access to this Object ▾			
Object: Roadmap Item - Attributes									
<input type="checkbox"/>	Attribute	Description	Active	Virtual	Data Warehouse	Data Type	Default	Database Table	Database Column
	ROI	ROI	✓		✓	Percent		RDM_ROADMAP_ITEMS	ROI
	Sponsor	Sponsor	✓		✓	Lookup - Number		RDM_ROADMAP_ITEMS	SPONSOR
	Start	Start	✓		✓	Date		RDM_ROADMAP_ITEMS	START_DATE
	Status	Status	✓		✓	Lookup - String		RDM_ROADMAP_ITEMS	STATUS
	Total Actual Cost	Total Actual Cost	✓	✓	✓	Money			
	Total Cost	Total Cost	✓	✓	✓	Money			
	Total Remaining Cost	Total Remaining Cost	✓	✓	✓	Money			
	Type	Type	✓		✓	Lookup - String		RDM_ROADMAP_ITEMS	TYPE

Create New Default Global Picklists

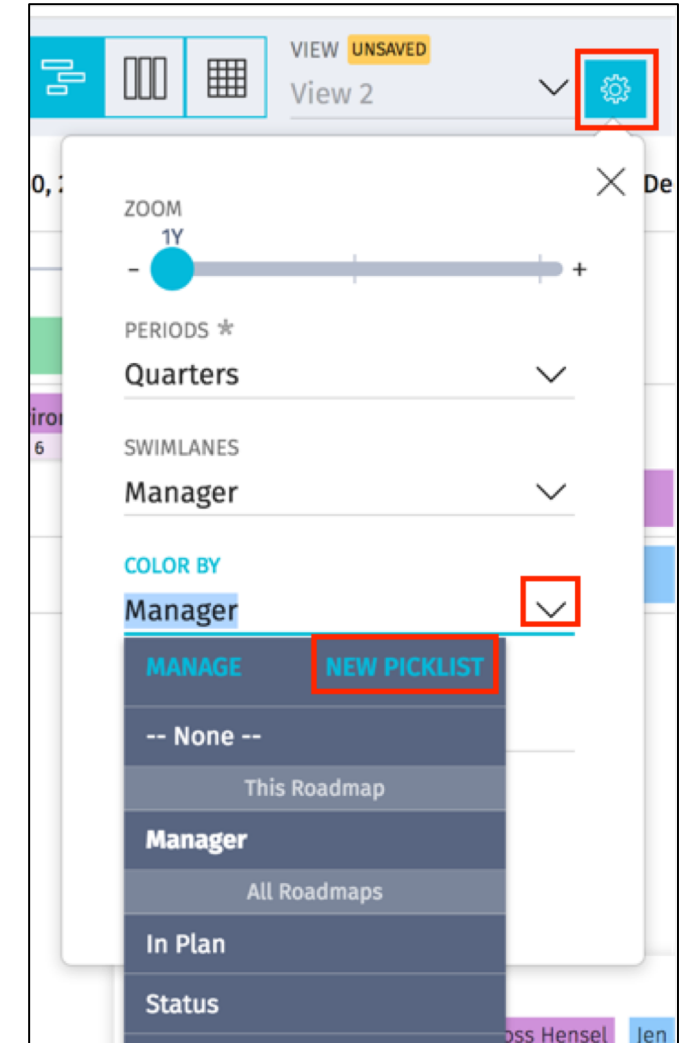
- Status, Type and In Plan are available out of the box for all roadmaps.
Administrators may create new global picklists to classify roadmap items that are specific to an organization
- Define a **static list lookup** within the *Lookups* section under *Data Administration* on the Administration side
- Create a new attribute within the *Roadmap Item* object and associate the lookup
 - Ensure that the attribute is a lookup data type, associated to the newly created lookup and has the API Attribute ID populated

The image displays three screenshots from the Rego University administration interface:

- Top Screenshot:** Shows the 'ADMINISTRATION' tab with the 'Data Administration' section. The 'Lookups' link is highlighted in a red box.
- Bottom Left Screenshot:** Shows the 'Object: Roadmap Item | Attribute: Funded? - Object Attribute' form. The 'Data Type' is set to 'Lookup' and the 'Lookup' is set to 'Funded'. The 'API Attribute ID' is set to 'funded'. The 'Funded?' attribute name and 'funded' attribute ID are also visible. The 'API Attribute ID' field is highlighted in a red box.
- Bottom Right Screenshot:** Shows the 'Objects' table with columns: Object, ID, Description, Master Object, Partition Model, Event Enabled, Data Warehouse, and Data Warehouse Trending. The 'Roadmap Item' object is highlighted in a red box.

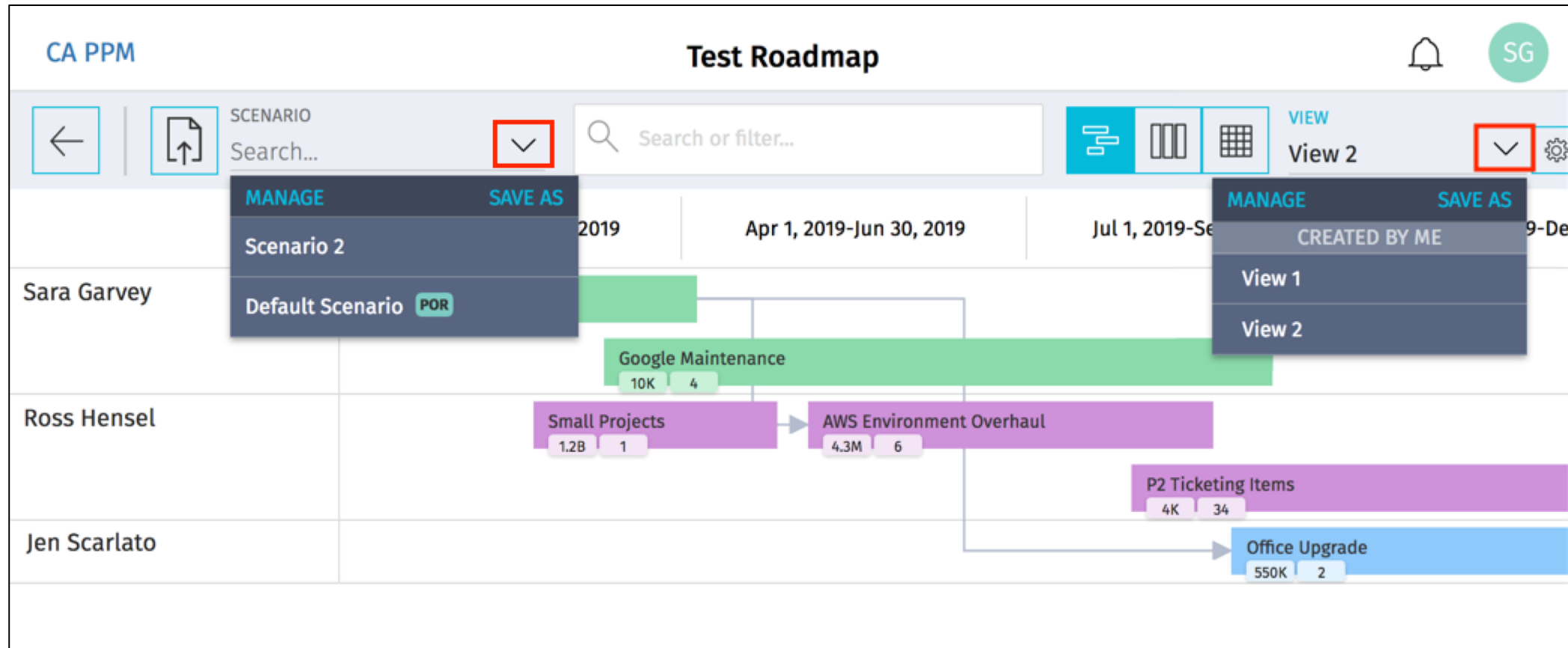
Local Picklists

- Can create custom picklists within a roadmap
- Custom picklist created within a roadmap is only available to that one roadmap – they are not shared across roadmaps
- Manage (add/remove options and delete) local picklists within in each roadmap for which they are attached
 - Picklists associated with colors may also be managed within the *Manage* section



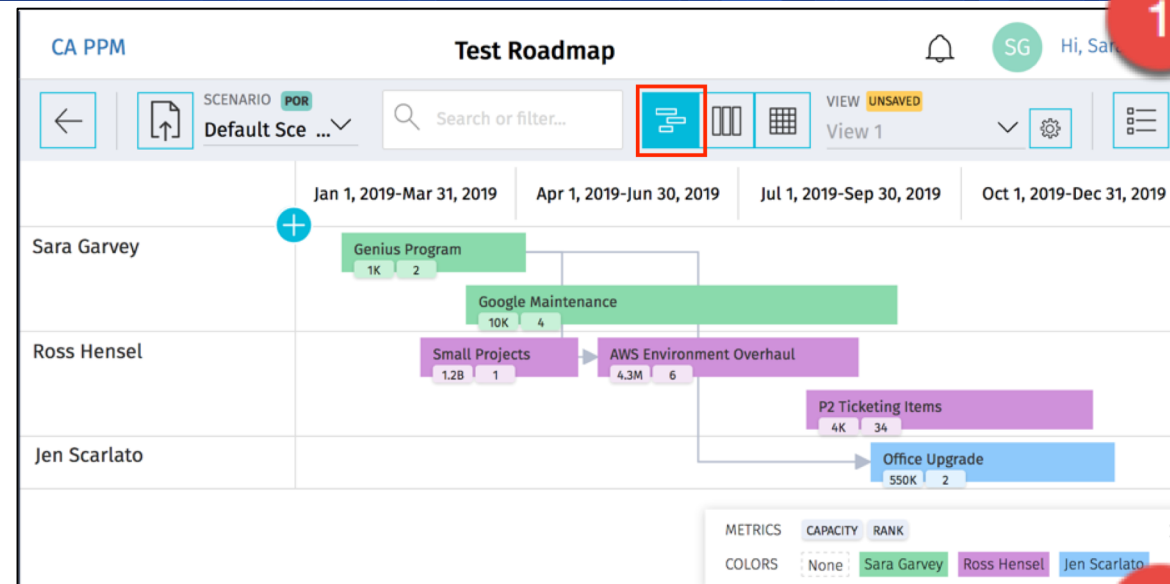
Roadmap Options

- Can create Scenarios and Views to differentiate options within the Roadmap



Views

- 3 Roadmap Views:
 1. Timeline
 2. Board
 3. Grid
- Can add items and edit in all 3 views



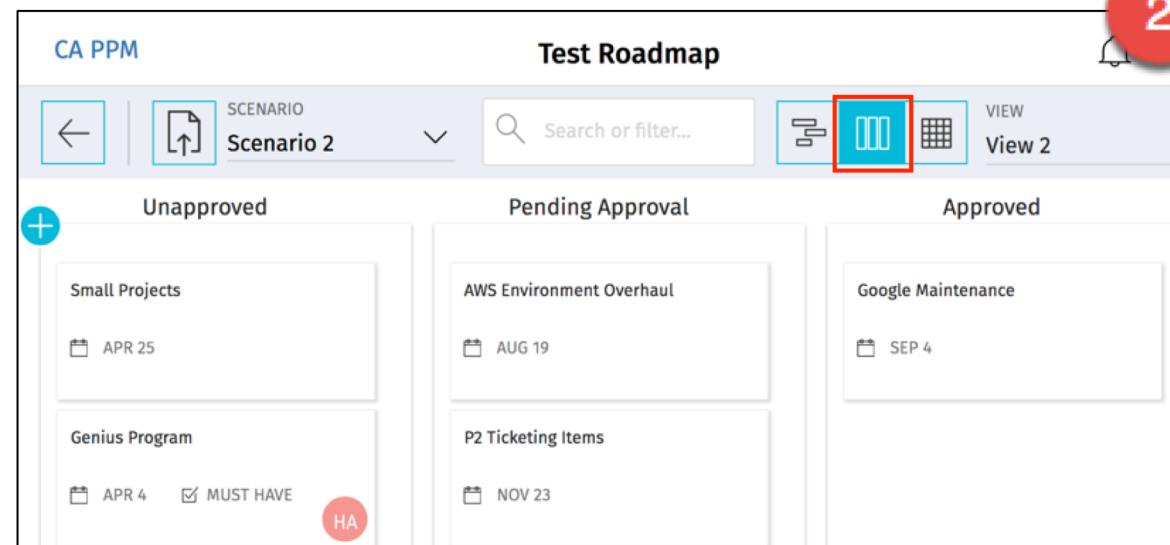
CA PPM Test Roadmap

SCENARIO **Scenario 2**

Search or filter...

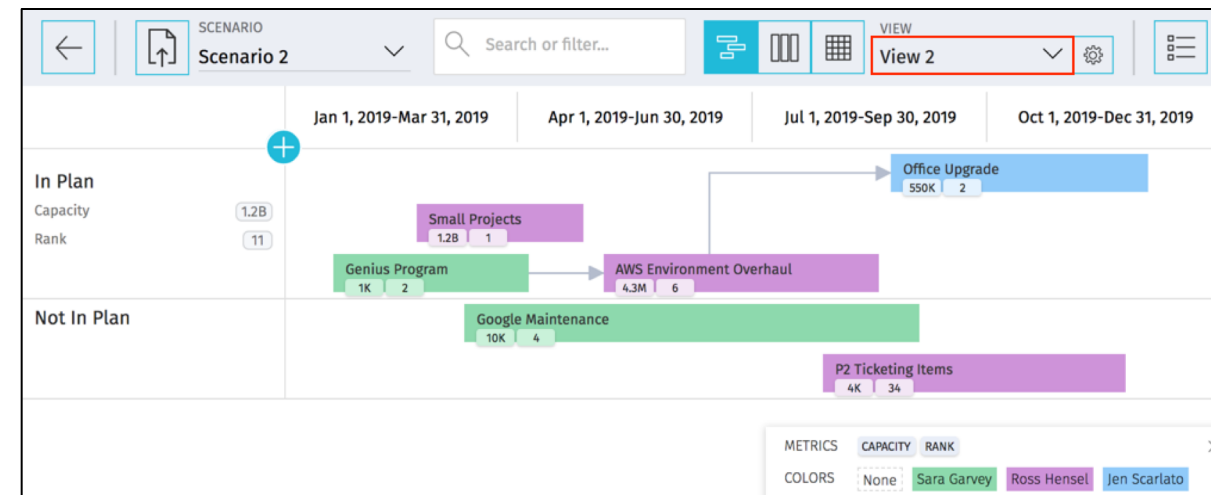
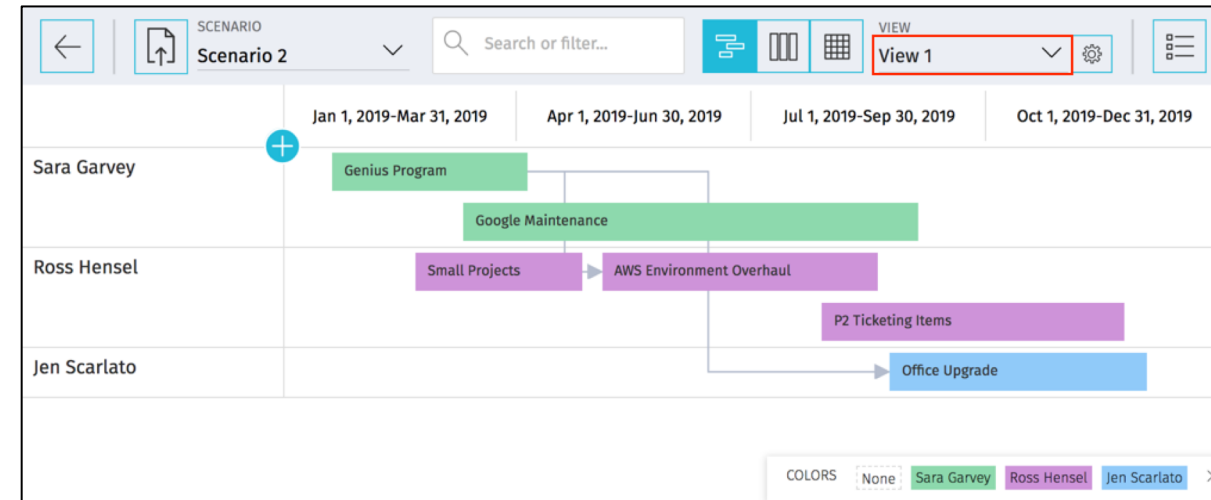
VIEW **UNSAVED** View 2

In Plan	Rank	Roadmap It...	Sponsor	Owner	Start	Finish
<input checked="" type="checkbox"/>	2	Office Upgrade	Administrator...	Bolin, Rod	Aug 24 2019	Dec 02 2019
<input checked="" type="checkbox"/>	1	Small Projects	Garvey, Sara	Administrator...	Feb 20 2019	Apr 25 2019
<input checked="" type="checkbox"/>	2	Genius Progr...	Avery, Hannah	Bolin, Rod	Jan 20 2019	Apr 04 2019
<input type="checkbox"/>	4	Google Maint...	Flores, Vivian	Avery, Hannah	Mar 10 2019	Sep 04 2019
<input checked="" type="checkbox"/>	6	AWS Environ...	Campbell, Re...	Bonham, Jess...	May 03 2019	Aug 19 2019
<input type="checkbox"/>	34	P2 Ticketing I...	Campbell, Re...	Bonham, Jess...	Jul 28 2019	Nov 23 2019



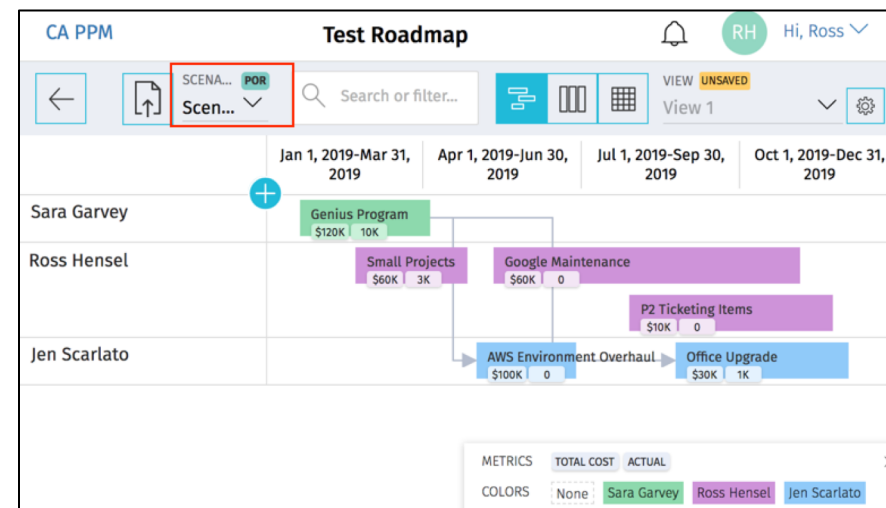
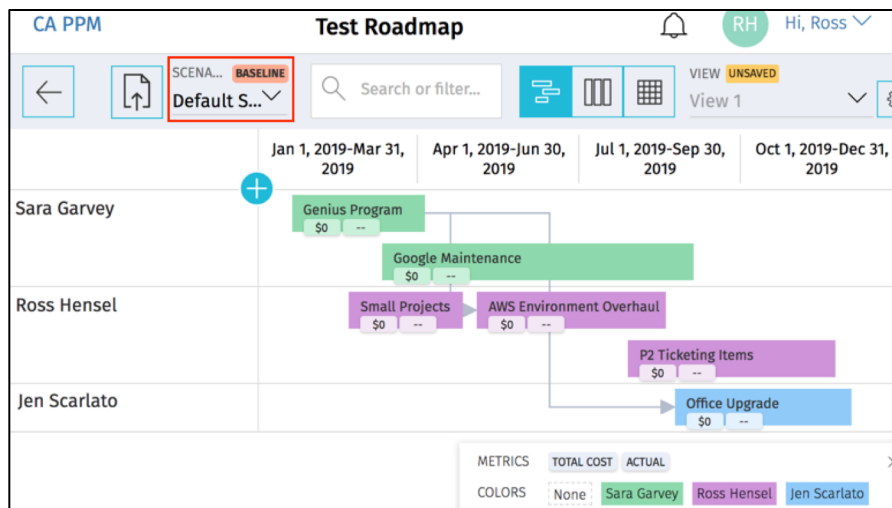
Views

- Views allow a roadmap user to personalize columns that are relevant and capture information quickly
- Saved views are accessible to all users with access to the roadmap
- Roadmap specific and span across all scenarios
- Grid Personalization Examples:
 - Apply filters
 - Pin/unpin columns
 - Re-order the columns
 - Add/remove columns



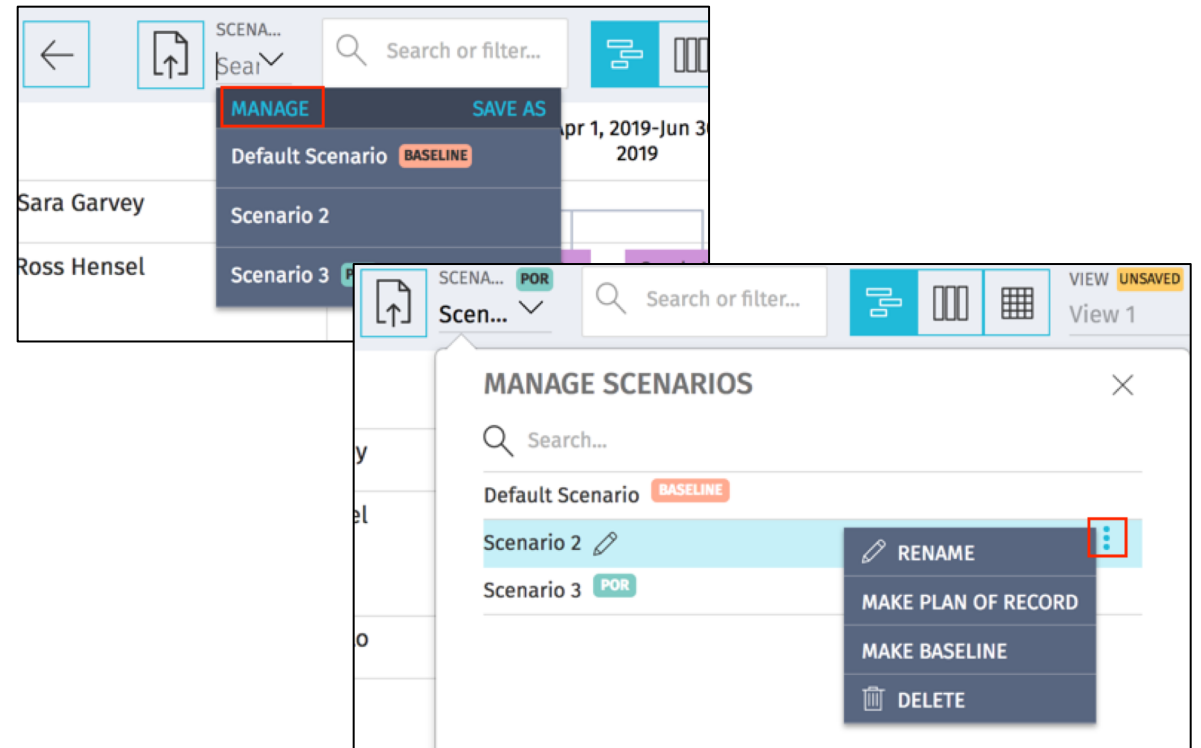
Scenarios

- Allow roadmap users to explore changes to the roadmap items for “what-if” analysis. They are copies of road map data with a unique name
- Multiple scenarios may be created for a roadmap and one may be marked as the plan of record
- Switching between scenarios will only update the roadmap data, views will not adjust unless the user selects a different one



Scenarios

- A default scenario is created with each new roadmap and is marked as the plan of record
- Each scenario may be marked as the plan of record or baseline, but only one of each
- Manage the plan of record and baseline flags, scenario names and deletion of scenarios within the roadmap itself



Questions?



*rego*University 2018

Let Rego be your guide.

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 CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- 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.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com

Appendix

Adoption Metrics

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