



# Roadmap

## User Guide

November 2011  
Version 1.4

**Mac users, please read me first!**



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## Table of Contents

1	Introduction .....	3
1.1	Project-Centric .....	3
1.2	Resource-Centric.....	3
1.3	Key Application Pages.....	4
2	Projects.....	6
2.1	Project 360 – the Project Homepage .....	6
2.2	Projects Tab – Grid View of Your Portfolio.....	8
2.3	Adding New Projects.....	10
2.4	Dashboard Tab – Gantt View of Your Portfolio.....	11
3	Resources .....	12
3.1	Resource 360 – the Resource Homepage.....	12
3.2	Resources Tab – Grid View of your Resources .....	14
3.3	Resources Tab – Availability or Forecast View .....	16
3.4	Resources Tab – Team Calendar.....	17
3.5	Resource Forecasting: When Adding Any Work Item.....	18
3.6	Resource Forecasting: When Editing Any Work Item.....	18
4	Appendix .....	19
4.1	Glossary .....	19
4.2	Application Site Map .....	20

## 1 Introduction

Review Roadmap use cases, as well as some of the main pages in the application.

### 1.1 Project-Centric

View everything from the perspective of – or through the prism of – the project. Ideal for weekly status meetings covering multiple projects:

	Project Health	Days Until Due	Roadblocks	Milestones	Project Lead
Project 1	Critical	-1	<input type="checkbox"/> Roadblock	<input type="checkbox"/> Milestone	Bill
Project 2	At Risk	32	<input type="checkbox"/> Roadblock	<input type="checkbox"/> Milestone	Anne
Project 3	On-Time	75		<input type="checkbox"/> Milestone	Dave

... or periodic planning reviews focused on alignment with broader (strategic) objectives:

	Objective	Project Type	ROI	Fiscal Year	Region
Project 1	Parity	Mobile App	9.9%	2011	Global
Project 2	Cost Savings	Web App	7.2%	2011	Asia Pacific
Project 3	Regulatory	Reporting	5.3%	2012	N. America

### 1.2 Resource-Centric

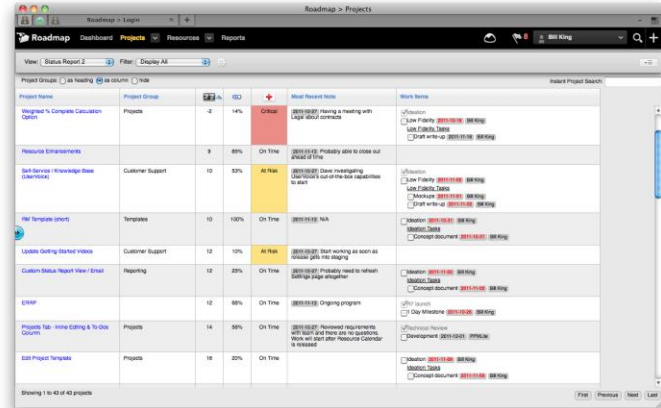
View everything from the perspective of – or through the prism of – the resource. Ideal for planning/staffing managers at the cross-portfolio level, and manager-employee 1:1s, and resources at the individual resource level.

	Role	Availability	To-Dos	Roadblocks
Resource 1	Developer		<input type="checkbox"/> To-do <input type="checkbox"/> To-do <input type="checkbox"/> To-do	<input type="checkbox"/> Roadblock
Resource 3	Designer		<input type="checkbox"/> To-do <input type="checkbox"/> To-do	<input type="checkbox"/> Roadblock
Resource 3	Analyst		<input type="checkbox"/> To-do <input type="checkbox"/> To-do	

## 1.3 Key Application Pages

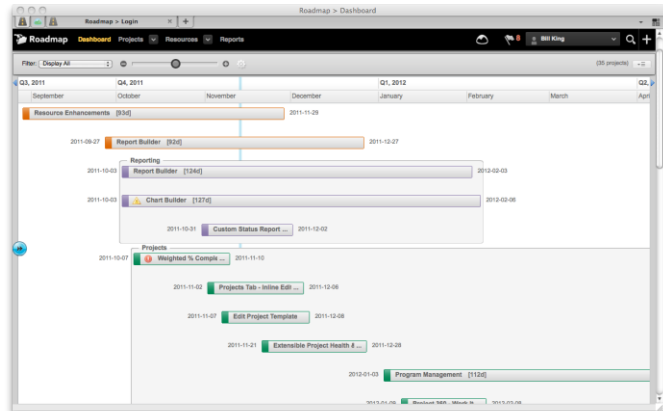
### Projects Tab

- Top-down grid view of projects
- Custom criteria and column order
- Sortable and filterable
- Instant type-down page search
- Export to Excel



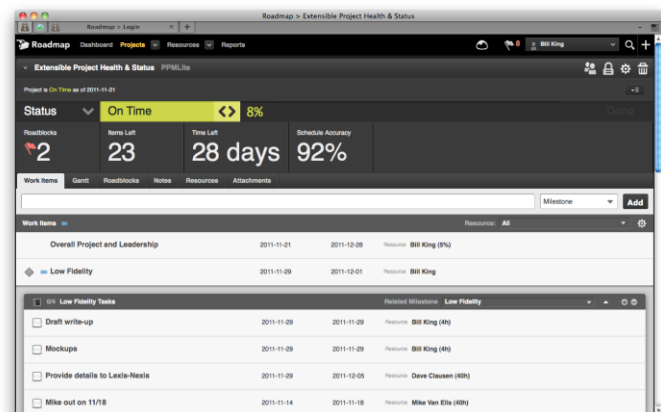
### Dashboard Tab

- Top-down Gantt view of projects
- Interactive, drag-and-drop projects and milestones
- Filterable
- Export to image file (.png)



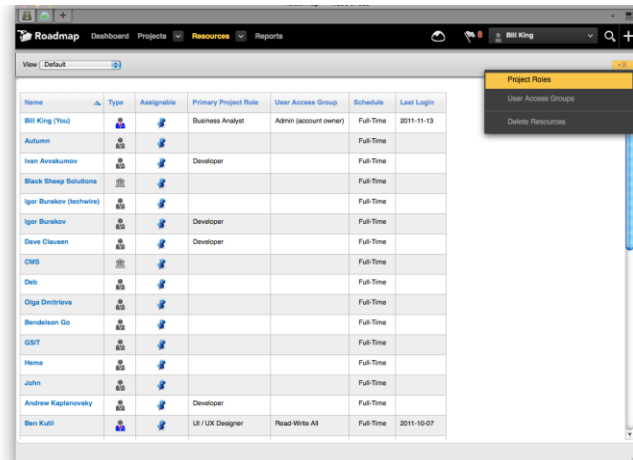
### Project 360

- Bottoms-up detail view of individual project
- Project health, status and stats
- Sub-tabs for work items, Gantt, resources, roadblocks, notes and attachments
- Schedule audit (Pro only)



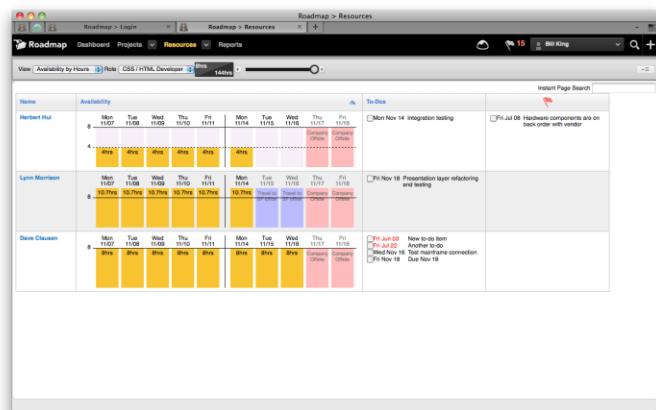
## Resources Tab

- Top-down grid view of resources
- Sort by name, role, type, assignable, user access group, schedule and last login
- Add or edit project roles
- Add or edit user access groups
- Bulk delete or archive resources



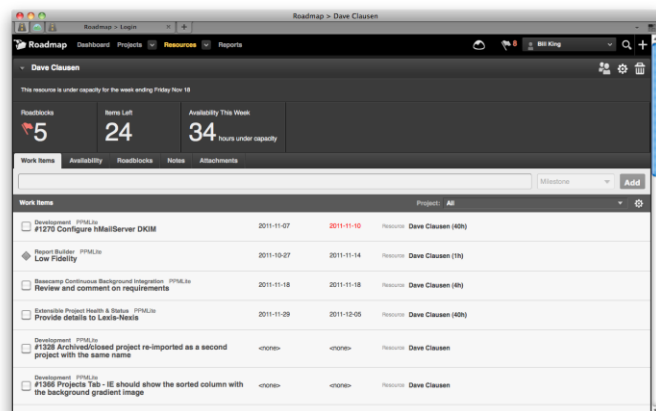
## Resources Tab – Availability View

- Top-down grid view of resources
- Sort by name or availability
- Filter by role
- View assigned to-dos and roadblocks to provide greater context



## Resource 360

- Bottoms-up detail view of individual resource
- Resource workload and statistics
- Sub-tabs for work items, availability, roadblocks, notes and attachments
- Filter work items by project



## 2 Projects

### 2.1 Project 360 – the Project Homepage

- **Project Status & Health**
  - On Time, At Risk, and Critical combine project status and project health. They are active projects and, along with On Hold project status, count towards Roadmap subscription plan limits.
  - Closed projects do not count towards subscription plan limits.
  - Basecamp project status cannot be edited in Roadmap; you must change it in Basecamp then re-import to Roadmap, which will automatically recognize the change and update it appropriately.
  - [Screenshot](#)
- **Percent Complete.** Automatically calculated or drag-and-drop if account-wide setting is manual.
- **Project Statistics.** At-a-glance view of key project criteria.
  - Roadblocks = number of unresolved issues
  - Items Left = number of incomplete milestones and to-do items
  - Time Left = days until project due date
  - Schedule Accuracy = accuracy of original project due date (only available to Pro accounts; Schedule Audit must be turned on)
- **Status Report Email.** Manage which users, resources and interested parties get this project in the automated weekly status report email. Interested parties are merely email recipients. They do not have any affiliation with your Roadmap account.
- **Schedule Audit.** Provides a visually intuitive method to track and communicate project schedule changes. When enabled, the system will require the user to enter a description or rationale for any date change that causes the project due date to slip. Only available to Pro subscription plans.
- **Project Settings.** Edit project name, core project attributes, custom project attributes, and project description.
- **Delete or Close (archive) Project.** You have the option to permanently delete or close (archive) projects. Deleting a project imported from Basecamp will not delete the project in Basecamp.

- **Work Items Shelf**
  - [View, edit, add or delete](#) milestones, to-do lists and to-do items.
  - View or edit project-level leadership resources and forecasts. For example, a project manager may not be responsible for any work items so this is a mechanism to account for their time.
  - Enable or disable milestone dependencies for the entire project. Skip (make independent) specific milestones from the overall dependencies.
- **Gantt Shelf.** Visually edit, add or delete milestones, to-do lists and to-do items. Resource forecasting is limited to milestones and using percentage terms. *Note: The Gantt chart is being re-written from the ground-up to allow full resource forecasting plus many more enhancements.*
- **Roadblocks Shelf.** Number of project roadblocks (think of roadblocks as issues). [Roadblocks have a subject, body and a responsible party](#). Filter by unresolved or all.
- **Notes Shelf.** Notes have a body and automatically capture the author and timestamp. Notes entered on the Project 360 page are automatically displayed on Projects Tab and vice versa.
- **Resources Shelf.** Displays [resources](#) that have work items or Roadblocks assigned to them, or who have added notes or uploaded file attachments.
- **Attachments Shelf.** Upload [files](#) to Roadmap or view files uploaded to Basecamp projects. Files displayed via Basecamp can only be downloaded. You cannot delete or upload a new version of the file.

## 2.2 Projects Tab – Grid View of Your Portfolio

Views & Filters      Display Preferences      Export to Excel and Bulk Delete Projects

Project Name	Tasks	Progress	Status	Count	Most Recent Note	Work Items
ToDo ORDER Test	245	28%	On Time	0		<input checked="" type="checkbox"/> Compare sort logic across biz apps <input type="checkbox"/> new milestone 2011-09-08   Andrew Kaplanovsky
<b>Business Development</b>						
Partnership Strategy	30	42%	At Risk	1	2011-08-07 Ready to start budget allocations. Meeting with individual teams over next two weeks before presenting to Ho-KI.	<input type="checkbox"/> Allocate partner funding percent 2011-09-02   Linda Connolly <input type="checkbox"/> Partner allocations <input type="checkbox"/> Co-marketing 2011-08-12   Linda Connolly
Status Report	95	90%	On Time	0		<input checked="" type="checkbox"/> Iteration 1 release to test
Softmedia Air Traffic Control	115	0%	On Time	0	2010-10-08 Met with Nancy; she approved the mockups	<input type="checkbox"/> Requirements 2010-11-01   Linda Connolly
<b>Marketing Programs</b>						
Golden Gate Foundation	3	16%	On Time	0	2010-04-09 GGF wants to adjust the inputs	<input checked="" type="checkbox"/> Business Case <input type="checkbox"/> Requirements 2011-08-29   Sally Cochran <input type="checkbox"/> Business Requirements <input type="checkbox"/> Provide GGF with artwork 2010-12-15   Joanne Larson <input type="checkbox"/> 2011 co-marketing calendar 2010-12-18   Melih Elbol
Brand Value & Positioning	44	10%	On Time	1	2011-08-03 Met with LA County	<input type="checkbox"/> Business Requirements 2011-09-05   Mitch Price
Google AdWords - Japan	63	33%	Critical	0	2010-10-13 Client asked to change algorithm to calculate the weather	<input checked="" type="checkbox"/> Implement <input type="checkbox"/> Tune Program 2011-08-18   Marcelas Abino
<b>Social Networking Pilot</b>						

Showing 26 to 47 of 47 projects

First Previous 1 2 Next Last

- Column Sorting & Pagination.** Sort columns to change your perspective on the project data. Use pagination to display a subset of your projects at a time – choose 25, 50, 100 per page or All projects. Column sorting works across all pages (i.e. independently from pagination).
- Views.** Views are custom column sets and column display orders. All users can create their own views; admins can create and syndicate or publish views to be available to all users. There are two out-of-the box views:
  - Default view which is editable by admins and automatically syndicated to all users
  - Status Report view which contains the same columns as the Weekly Status Report Email. The Status Report view is not editable (but it will be soon).
- Filters.** Filters provide "lenses" of the current view using custom project attributes (i.e. criteria). The [fly-out tray](#) allows ad hoc filtering while the drop menu consists of saved filters. Filters created on the Dashboard Tab are automatically made available on the Projects Tab and vice versa.
- Programs.** Programs (project groups) are containers of projects with a common strategy, objective, etc. You can add or remove projects from programs in Project Settings or the Dashboard Tab. You can also add them when creating a new project.

- **Download to Excel.** Export the current view as WYSIWYG into a pre-formatted Excel file.
- **Display Preferences.** Number of projects per page (25, 50, 100 or all), Work Items (none, due next week, all), Schedule Accuracy (summary or full details), and Most Recent Note (1, 2, 3 or all lines of text) columns.
- **Bulk Delete Projects.** Permanently delete [multiple projects](#) at a time. Deleting a project imported from Basecamp will not delete the project in Basecamp.

## 2.3 Adding New Projects

**Create New Project**

**Project Name**  
[Text Input Field]

**Template**  
[Dropdown Menu: <select>]

**Start** [Date Picker] [Calendar Icon]      **End** [Date Picker] [Calendar Icon]

**Project Group**  
[Dropdown Menu: (None)]

**User Access Groups**  
(no groups selected)

**Create project in Basecamp**  
If checked, the project will be created in both Roadmap and Basecamp.?

[Save] [Cancel]

- **Project Templates.** [Save projects as a template](#) to enhance your productivity by cloning work items, resources, resource forecasts, and dependencies. All you have to do enter the project name and start date.
- **Programs.** Add a new project to an existing program (project group), or create a new program on-the-fly.
- **User Access Groups.** Provide project access to specific user access groups.
- **Basecamp Project.** Create the project in Basecamp and Roadmap at the same time.

## 2.4 Dashboard Tab – Gantt View of Your Portfolio

The screenshot shows the Roadmap Dashboard Tab in Gantt View. The interface includes a top navigation bar with 'Roadmap', 'Dashboard', 'Projects', 'Resources', and 'Reports'. A user profile for 'Bill King' is visible. Below the navigation is a filter dropdown set to 'Display All' and a zoom slider. The main area displays a Gantt chart with project bars for various programs and business development tasks. Annotations with green arrows point to specific UI elements: 'Filters' points to the filter dropdown, 'Zoom' points to the zoom slider, 'Display Preferences' points to a gear icon, and 'Download to Image File' points to a plus icon. A green bracket on the right side of the chart labels a group of bars as 'Programs (project group)'.

- Filters.** Filters provide "lenses" of the current view using custom project attributes (i.e. criteria). The [fly-out tray](#) allows ad hoc filtering while the drop menu consists of saved filters. Filters created on the Dashboard Tab are automatically made available on the Projects Tab and vice versa.
- Programs.** Programs (project groups) are containers of projects with a common strategy, objective, etc. Drop-and-drag to add or remove projects from programs. You can also add them when creating a new project.
- Download Image File.** Download what's currently in view from left or right. Projects below the fold will also be included.
- Display Preferences.** Personalize whether or not to display start/end dates and completed todos.

## 3 Resources

### 3.1 Resource 360 – the Resource Homepage

All unresolved Roadblocks assigned to resource

All incomplete milestones and to-do items assigned to resource

Status Report Email Subscriptions

This resource is at capacity for the week ending Friday Nov 11

Roadblocks 5

Items Left 24

Availability This Week 0 hours (at capacity)

Work Items

Filter by project

Project: All

Project	Start Date	End Date	Resource
Development PPMLite #1270 Configure hMailServer DKIM	2011-11-07	2011-11-10	Dave Clausen (40h)
Report Builder Low Fidelity PPMLite	2011-10-27	2011-11-14	Dave Clausen (1h)

Project name and client are displayed above the work item

Settings to define if completed items are displayed. If displayed, define how far back in time to display them (e.g. 1 week, 30 days, etc)

- **Last Login.** Date stamp for the last time the user logged into Roadmap.
- **Subscriptions.** Displays all the projects the resource is associated with and the option of whether or not to include or exclude the project from the Weekly Status Report Email.
- **Resource Settings.** Functions available depend on the user's role and which person's Resource 360 page they are viewing. If:
  - User is viewing their own Resource 360 page they can:
    - Edit name
    - Edit email
    - Edit assignable / not assignable status
    - Edit primary project role
    - Edit password
  - User is viewing another user's Resource 360 page, the page is read-only
  - User is viewing a resource-only Resource 360 (i.e. no Roadmap login account), the page is read-only
  - Admin is viewing another user's Resource 360 page they can:
    - Edit name
    - Edit email
    - Edit User Access Group
    - Edit assignable / not assignable status

- Edit primary project role
  - Resend email invitation
  - Edit password
- Admin is viewing a resource-only Resource 360 page they can:
  - Edit name
  - Edit assignable / not assignable status
  - Edit primary project role
  - Add email (to receive Weekly Status Report Email)
  - Migrate to user with login account
- **Delete or Archive User / Resource.** To delete or archive, go to Resource 360 page and click on the delete (trash can) icon. If resource is assigned to incomplete work items, the assignee field for those items will change to "None". For audit purposes, if resource is assigned to completed work items, the resource will be archived instead of permanently deleted. To see archived resources, go to *Resources Tab* -> *Archived Resources* view. An archived resource will become permanently deleted if the project is deleted. Function only available to admins.
- **Resource Statistics.** At-a-glance view of key resource criteria.
  - Roadblocks = number of unresolved issues across all projects
  - Items Left = number of incomplete milestones and to-do items across all projects
  - Availability This Week = total hours available or over-capacity between today and Friday (assumes 40-hour work week)
- **Work Items Shelf**
  - View, edit or delete all milestones and to-dos items assigned to resource
  - Filter by project. Mouse-over work item to display name of project, to-do list and associated milestone (if applicable)
  - Settings to define if complete items are displayed and how far back you go
- **Availability Shelf.** Displays the resource's overall availability
- **Roadblocks Shelf.** Displays all the roadblocks assigned to the resource. Filter by unresolved or all.
- **Notes Shelf.** Displays all the notes entered by the resource. View project note is associated with, and filter by recent (last 5 notes) or all. Anyone can edit other user's notes, but doing so will associate it with the most recent user to edit the note.
- **Attachments Shelf.** Display all the file attachments uploaded by the resource. View project file is associated with and filter by recent (last 5 files) or all. You can also filter by file type.

### 3.2 Resources Tab – Grid View of your Resources

Automatically add role whenever resource is assigned to a milestone or to-do. Override at the project-level.

Project-level security and permissions

Name	Type	Assignable	Primary Project Role	User Access Group	Schedule	Last Login
Bill King (You)			Project Manager	Admin (account owner)	Full-Time	Mon Nov 07
Estela Acuna			Business Analyst	Read-Write All		Wed Aug 03
Yana Afonin			App Developer	Read-Write All		Sat Jul 09
Veobia Akilo			Designer		Full-Time	
Jane Armacost			Flash Developer		Full-Time	

User, can log into Roadmap and be assigned to work

Resource, cannot log into Roadmap, but can be assigned to work

Enable or disable a resource from being available to be assigned to things

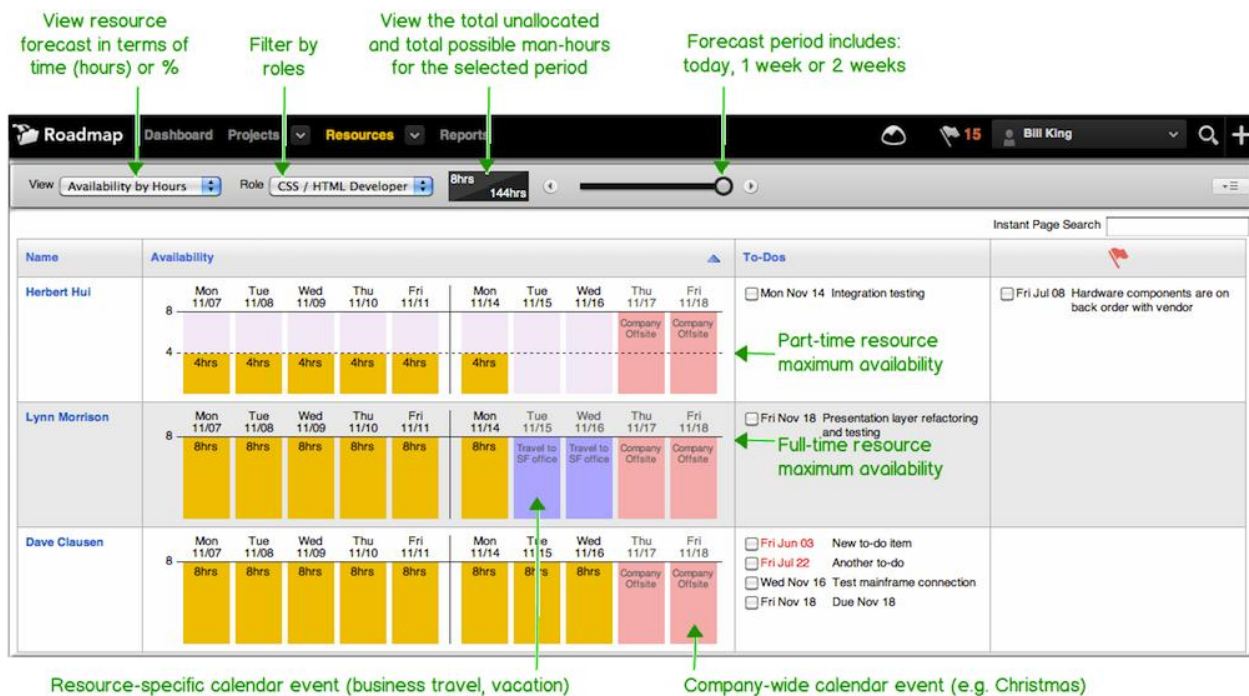
Set part-time resource's maximum hours (or %) per week.

	Can they log into Roadmap?	Can they be assigned to work?	What projects can they see?	Receive Status Report Email?
<b>Users</b>				
Admins	Yes	Yes	All	Yes
Read-Write	Yes	Yes	All or selected <sup>1</sup>	Yes
Read-Only	Yes	Yes	All or selected <sup>1</sup>	Yes
<b>Resources</b>	No	Yes	-	Yes
People	No	Yes	-	Yes
Companies	No	Yes	-	No
<b>Interested Parties</b>	No	No	-	Yes

<sup>1</sup> See below for more information about project-level security and User Access Groups

- **Imported Basecamp Users.** Imported Basecamp users (people) are not automatically granted Roadmap login credentials. Click on the Type icon next to their name to create their account and send the invitation email.
- **Migrate Resource to User.** To migrate a resource to a user (you must be an admin) click on the gray icon in the Type column, and select "Migrate to User with Login" option.
- **Primary Project Role.** If you provide a primary project role, Roadmap will automatically populate that role anytime you assign that resource. Primary project roles can be overwritten at the project-level. [View and manage project roles.](#)
- **User Access Groups.** Segment users into groups to provide project-level security (can they see it) and permissions (can they edit it). Users can only belong to one User Access Group at a time. If a user needs to bridge or span multiple User Access Groups, change their permissions role to admin. [View and manage User Access Groups.](#)
- **Schedule.** Full-time resource maximum available time per week is based on the account-wide workday duration settings (e.g. 8 hours per day). Part-Time resource maximum available time per week is [configurable in terms of hours or percentage.](#)
- **Edit Name or Email, or Change Password.** To edit your profile go to Account option in the drop-down menu located in the upper right corner (where your name is displayed). If you're an admin and need to edit another user's profile, go to Resources 360 page and click on Resource Settings icon. [View Resource Settings panel.](#)
- **Resend Email Invitation.** To resend a user's email invitation, go to Resources 360 page and click on Resource Settings icon. [View Resource Settings panel.](#)
- **Bulk Delete or Archive Users / Resources.** Permanently delete [multiple users or resources](#) at a time. If resource is assigned to incomplete work items, the assignee field for those items will change to "None". For audit purposes, if resource is assigned to completed work items, the resource will be archived instead of permanently deleted. To see archived resources, go to *Resources Tab -> Archived Resources* view. An archived resource will become permanently deleted if the project is deleted. Function only available to admins.
- **Last Login Date.** View the last time a user logged into Roadmap.

### 3.3 Resources Tab – Availability or Forecast View



- **View Resource Forecast in Terms of Time or %.** Toggle between displaying resources in the context of time (hours) or percent of overall availability.
- **Filter by Roles.** Narrow the list of resources by project roles.
- **Total Unallocated / Total Possible Man-Hours.** Displays the total amount of unallocated time and the total possible man-hours available in the current view. Total possible man-hours calculation = (number of resources) x (forecast period hours, which is either 4ohrs or 8ohrs per resource). So if you had 10 resources with a forecast period of two weeks, that's (10) x (80) = 800 possible man-hours.
- **Mouse-Over for Daily Allocation Per Project.** Mouse-over the bar charts to see the number of hours allocated per project per day for a specific resource.

### 3.4 Resources Tab – Team Calendar

The screenshot displays the 'Team Calendar' view in the Roadmap application. The navigation bar at the top includes 'Roadmap', 'Dashboard', 'Projects', 'Resources', and 'Reports'. Below the navigation bar, the 'View' dropdown is set to 'Team Calendar'. The calendar grid shows the dates from Sunday 30 to Wednesday 9. A red bar labeled 'Company holiday' spans Monday 31 and Tuesday 1. A blue bar labeled 'Dave Clausen: Travel to London' spans Tuesday 1 and Wednesday 2. The date 7 is highlighted in yellow.

- Use the team calendar to block-off company-wide events like official holidays, and individual resource events like business travel or vacation. Events are handled like weekends.
- All users can view the calendar but only admins can add, edit or delete events.
- To add a new event, double-click on the target date cell.
- To edit or delete an event, double-click on it. To adjust dates or move the event, simply drag-and-drop.
- Inserting a new event amid existing projects will not impact current due dates. However, once a calendar event has been instantiated, future date changes will be shifted as needed.

### 3.5 Resource Forecasting: When Adding Any Work Item

The screenshot shows the 'Add To-Do Item' dialog box. The title bar reads 'Add To-Do Item'. Inside, there is a text input field containing 'HTML demo'. Below this are two date pickers: 'Start Date' (11/14/2011) and 'Due Date' (11/16/2011). Under the due date, there are links for '1 day', '1 week', and '1 Month'. The 'Responsible Party' field is empty, and the 'Role' dropdown is set to 'CSS / HTML Developer'. The 'Estimate' field contains the number '8', and a dropdown next to it is set to 'Hours (h)'. A green arrow points to this dropdown with the text: 'Forecast in terms of time (hours, days, weeks) or percent'. Below the form is a section titled 'Select a Resource' with a date range 'Mon Nov 14' to 'Wed Nov 16'. It lists three resources: Herbert Hui (4hrs), Dave Clausen (24hrs), and Lynn Morrison (8hrs+). A tooltip for Dave Clausen shows 'Project 1 (4hrs) Part-Time Schedule (-12 hrs)'. A green arrow points to the tooltip with the text: 'Mouse-over the availability bar to see what other projects the resource is working on, if they have upcoming resource events like vacation, or if they are part-timers'. Another green arrow points to the 'Responsible Party' field with the text: 'Find by availability to match the best resource for the projected milestone (or to-do) duration'. A third green arrow points to the 'Role' dropdown with the text: 'Select resource by name or filter by role'. At the bottom right are 'Save' and 'Cancel' buttons.

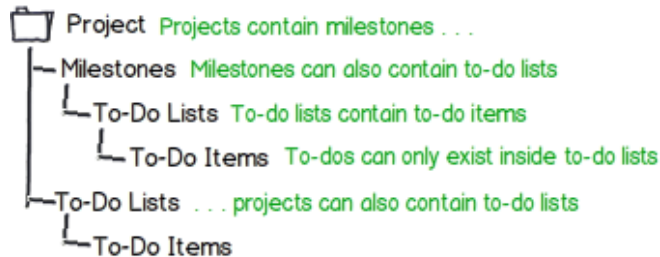
### 3.6 Resource Forecasting: When Editing Any Work Item

The screenshot shows a project task list. The top task is 'Brand Study' with start date 2011-08-08, due date 2011-09-23, and assigned to Michael Matthews. Below it is a collapsed task 'as is' brand positioning' with start date 2011-08-01, due date 2011-09-16, and assigned to Michael Matthews (60h). Annotations include: 'Milestone dependency is turned on' pointing to a checkbox on the left; 'Inline editing for existing resources' pointing to the 'Assigned to', 'Role', and 'Estimate' fields of the 'Brand Study' task; 'Delete Collapse' pointing to the collapse and delete icons on the right of the 'as is' brand positioning' task. A green box highlights the 'Assigned to', 'Role', and 'Estimate' fields for both tasks. A green arrow points to the collapsed task with the text: 'Click anywhere on a collapsed milestone or to-do to expand and enable editing'.

## 4 Appendix

### 4.1 Glossary

- **Project Hierarchy.** The Roadmap project hierarchy:



- **Work Items.** Units of measurable work that can be assigned to resources.
  - Milestones. A major ongoing activity or a single day event.
  - To-Do Lists. A container of to-do items.
  - To-Do Items. A task or unit of work.

	Assign Resources?	Forecast Effort?	States
Milestones	Required <sup>1</sup>	Optional	Incomplete or complete
To-Do Lists	N/A	N/A	N/A
To-Do Items	Optional <sup>2</sup>	Optional	Incomplete or complete

<sup>1</sup> Milestones and resources have a 1:many relationship

<sup>2</sup> To-do items and resources have a 1:1 relationship

- **Resources.** A person or an entity (company, department, vendor) that can be assigned to work items. Resources:
  - Do not have login credentials to access Roadmap
  - Have four states:
    - Assignable = available to be assigned to work items
    - Not assignable = not available to be assigned to new work items
    - Archived = not available to be assigned to new work items; and displayed in Archived Resources view (Resources Tab) if they are still associated with completed project work. If not associated with any completed work . . .
    - . . . the resource can be permanently deleted
- **Users.** A person that has login credentials to access Roadmap. Users may or may not be assignable to work items.

## 4.2 Application Site Map

