Spring ‘17



Roadmapper

Installation & User Guide

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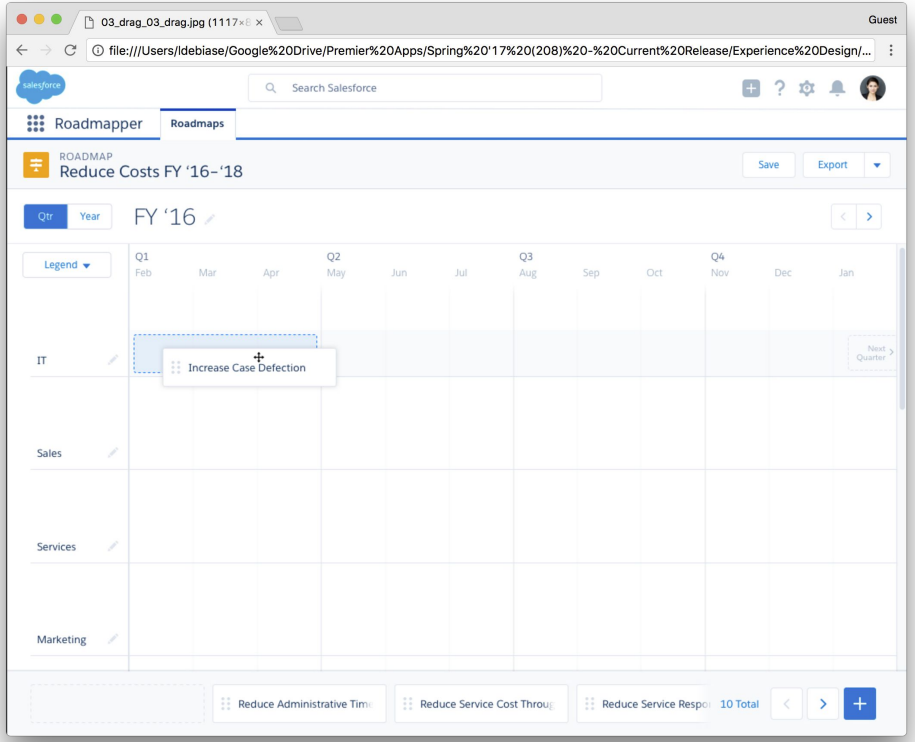
Installation Instructions

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Overview

Roadmapper is a powerful tool that helps you build visual roadmaps informed by business drivers.

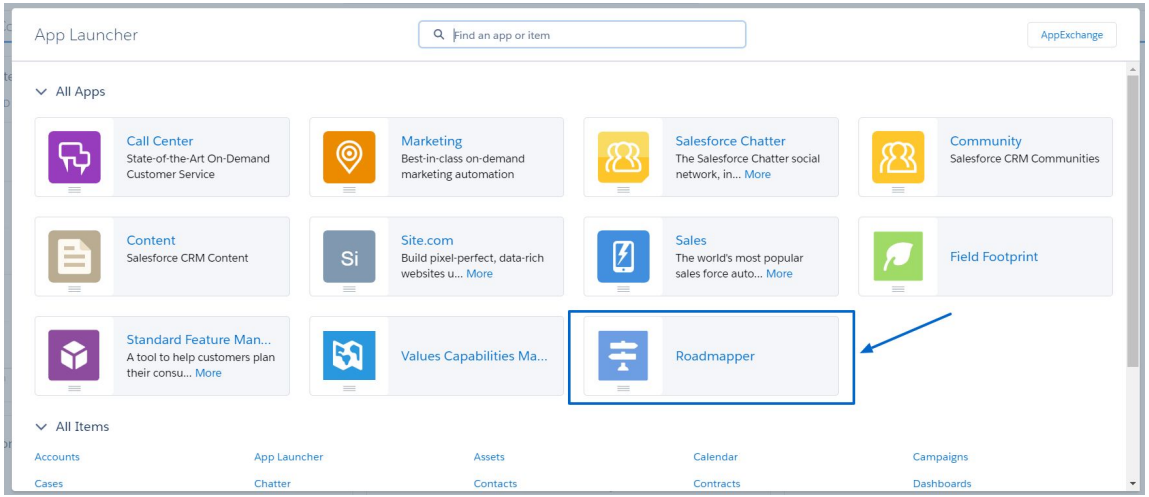
Whether you're looking to drive organizational change or show how to achieve business goals, Roadmapper helps align on how to achieve their goals and get the most value out of Salesforce features.



Access Instructions

Lightning

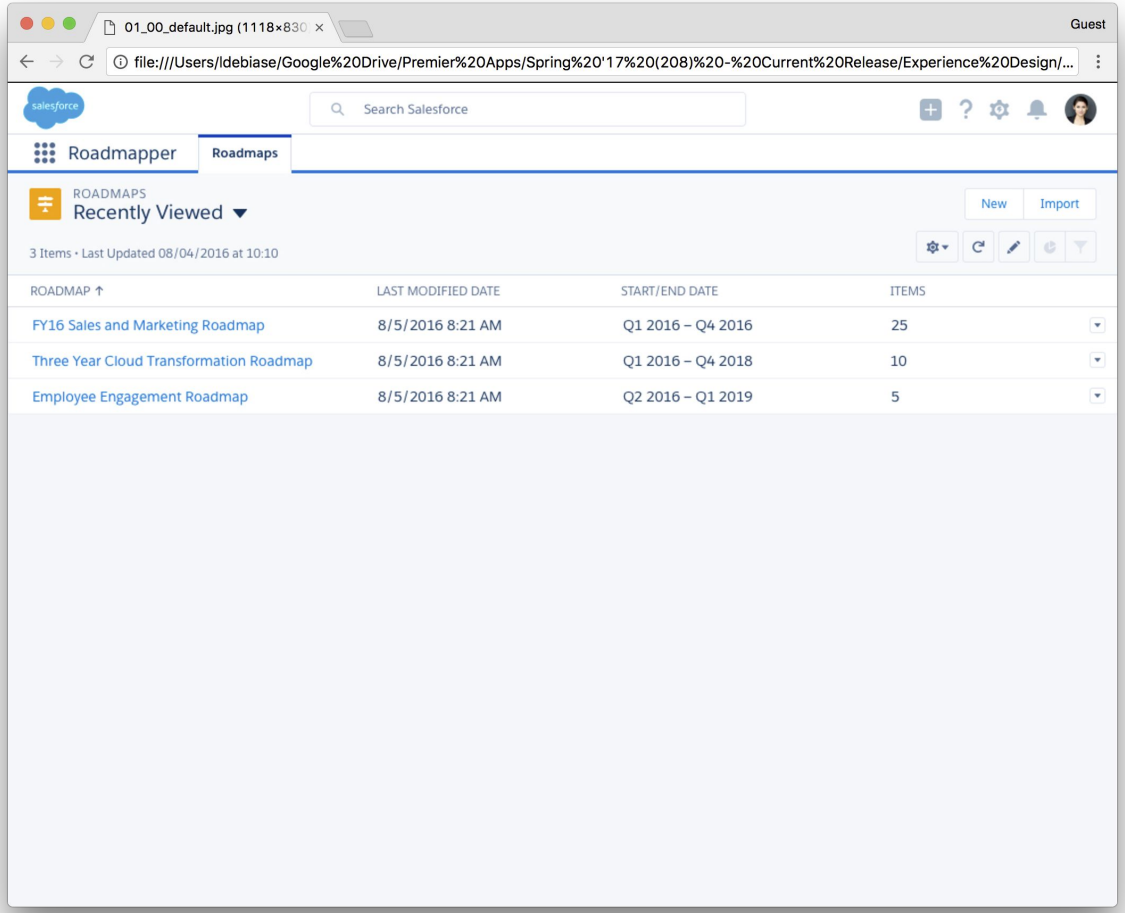
After you've verified the installation select Roadmapper from apps available in the App Launcher.



Usage Guide

For Lightning & Classic

Upon initial launch, you can select Example Roadmaps to see examples or create a new Roadmap.

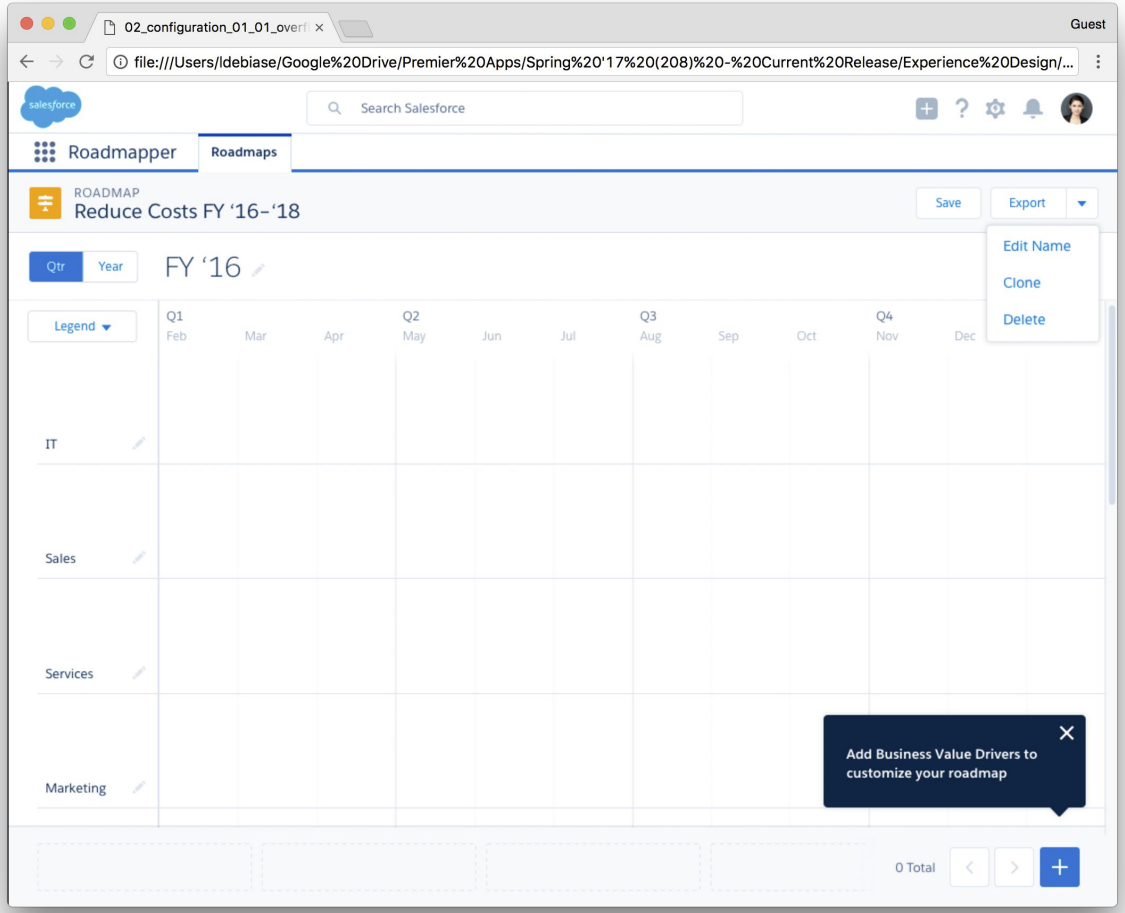


Usage Guide

For Lightning & Classic

The Roadmap canvas is completely configurable. You are free to edit the rows, legend, start/end dates, and the name to fit your business needs.

You can also clone and export your Roadmaps to put into any other presentation material.



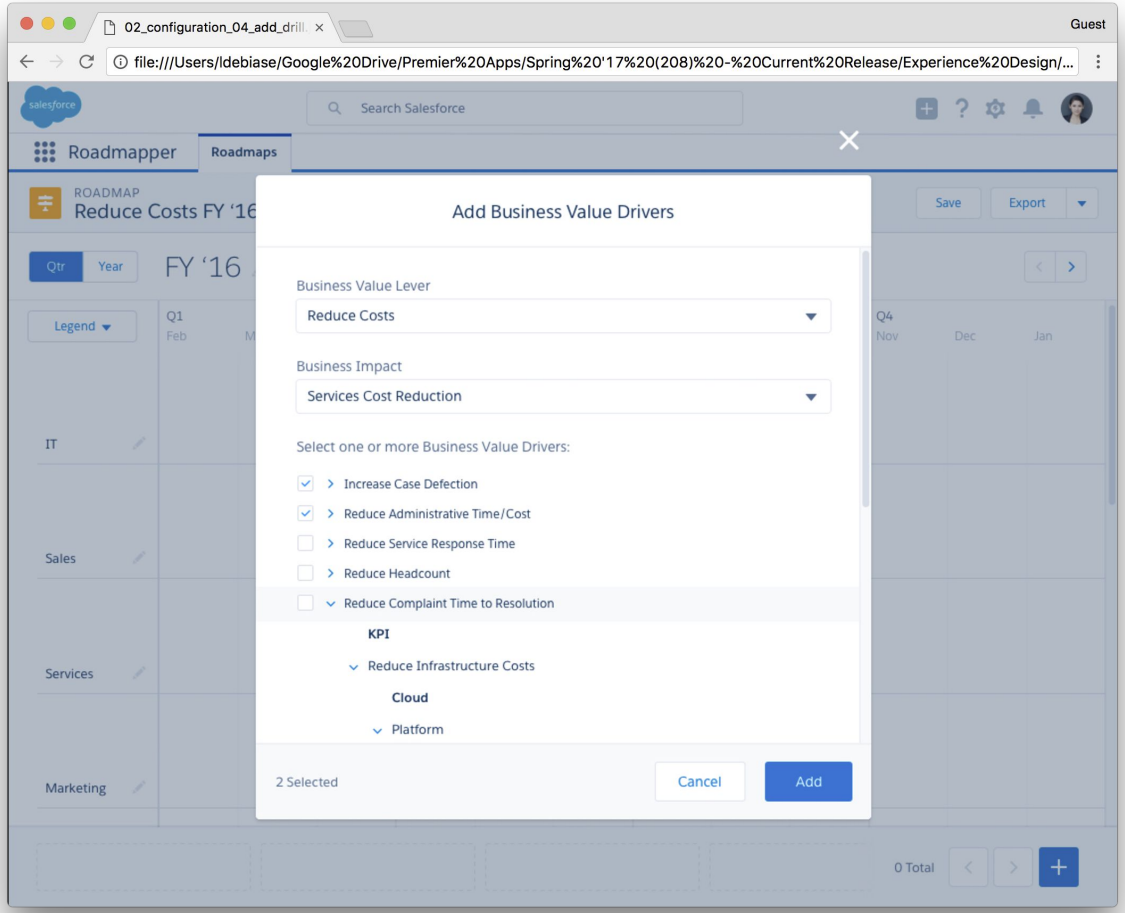
Usage Guide

For Lightning & Classic

To add items to your Roadmap, you need to select the business value drivers that you want to implement into your plan.

To learn more about what proceeds the business value driver, select the carrot to expose its subsidiary levels.

The Value Mapper app in the AppExchange also gives you this information in a tree view.

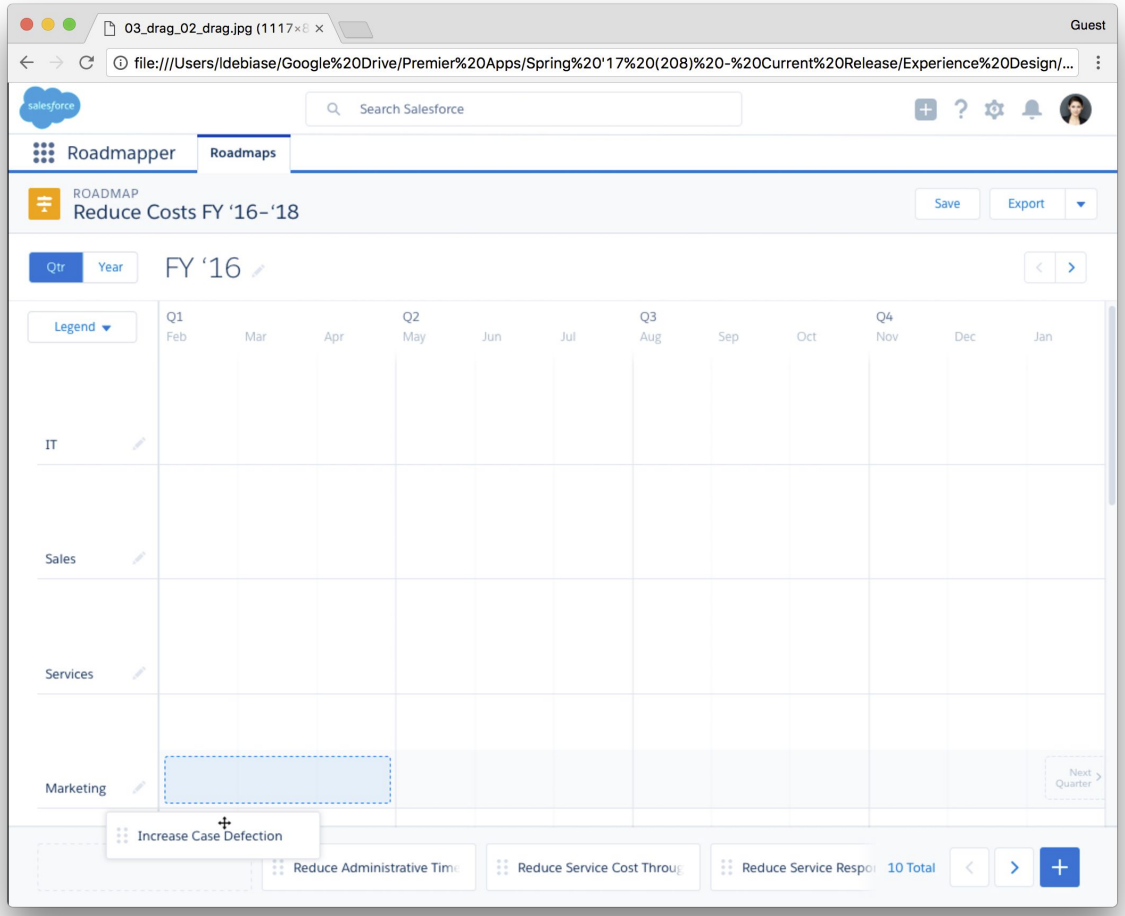


Usage Guide

For Lightning & Classic

Business value drivers that you have selected are now added to your queue bar at the bottom of the screen.

Drag them onto your Roadmap and see drop points that indicate where you can drop them.

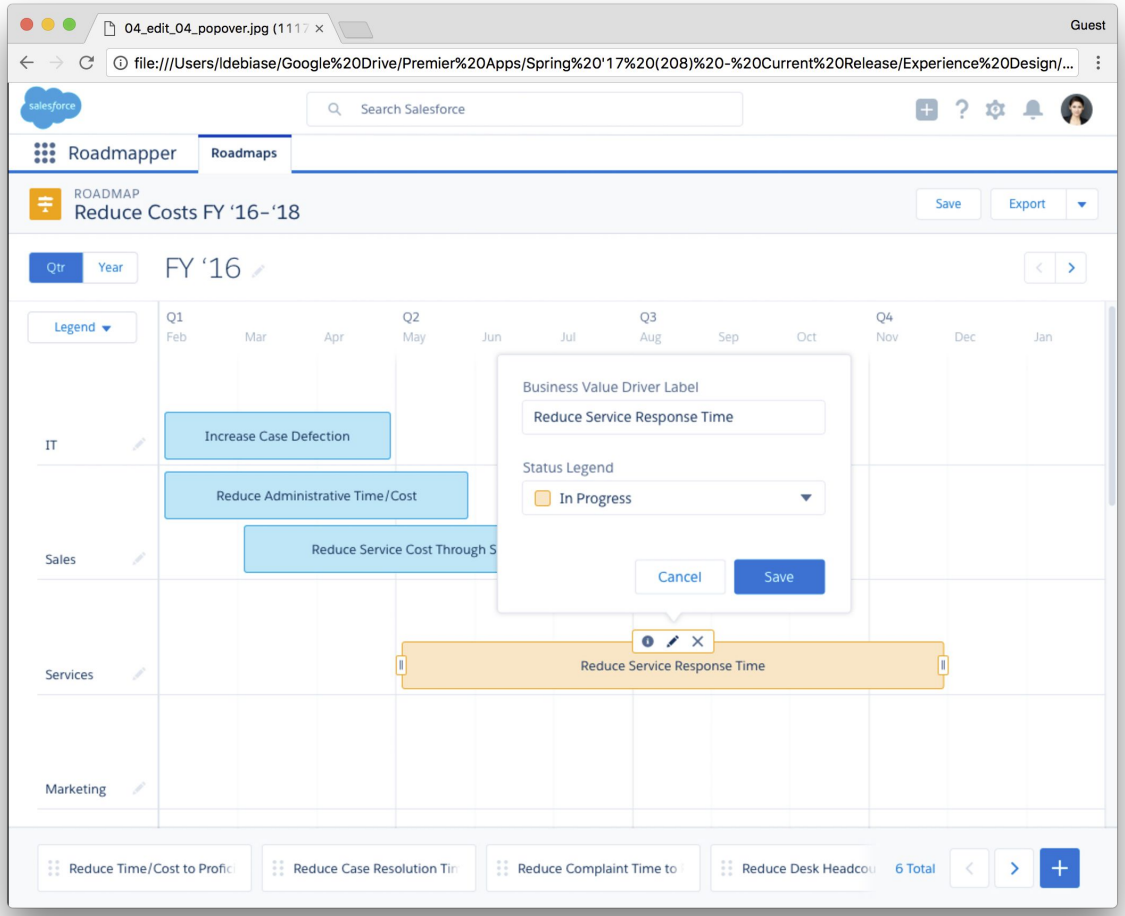


Usage Guide

For Lightning & Classic

Business value drivers on the canvas can be manipulated by stretching their position to adjust timeframe, editing their name and legend status, and deleting them from the canvas.

You can also click the info button to see where the business value driver sits in the value tree.

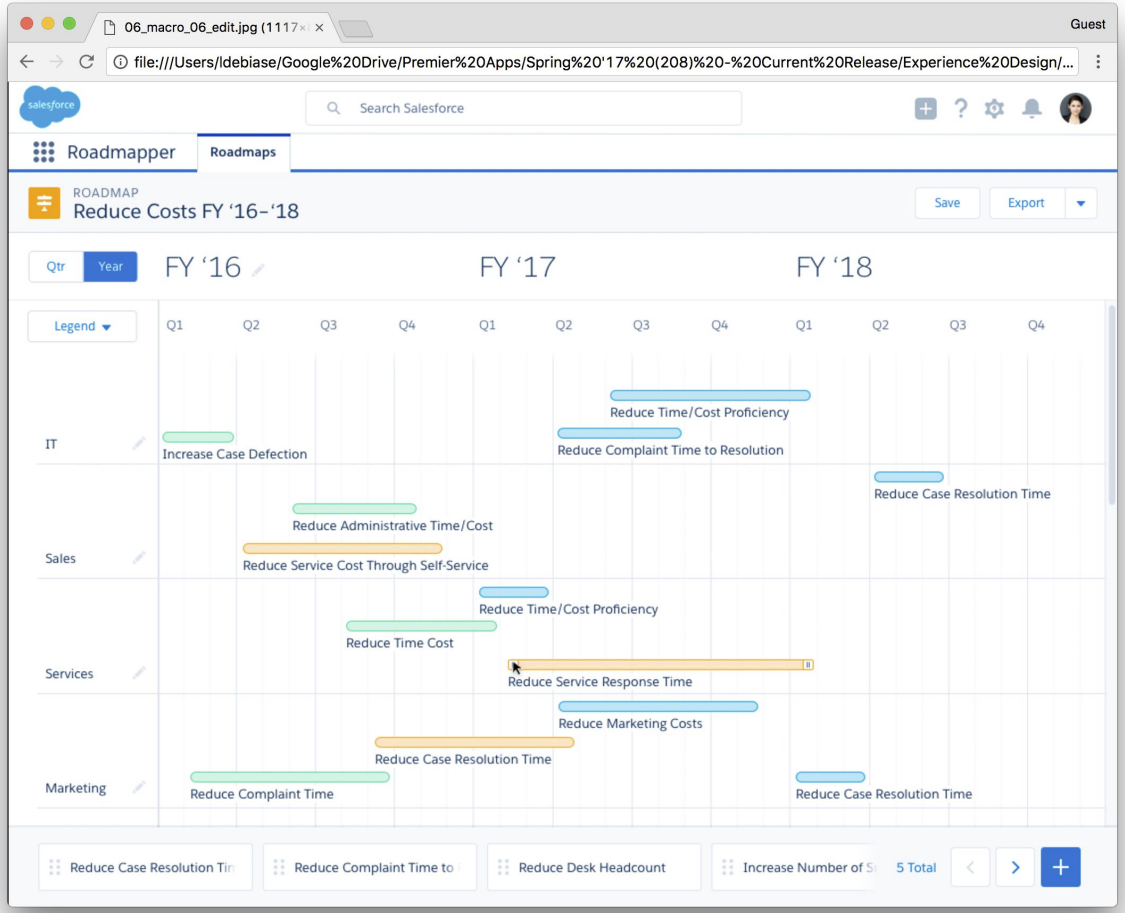


Usage Guide

For Lightning & Classic

If your timeline spans multiple years, you can use the Quarter/Year toggle to view your whole Roadmap on one screen.

On this view, you can manipulate the business value drivers the same way you do on the quarter view, as well as export for a presentation.

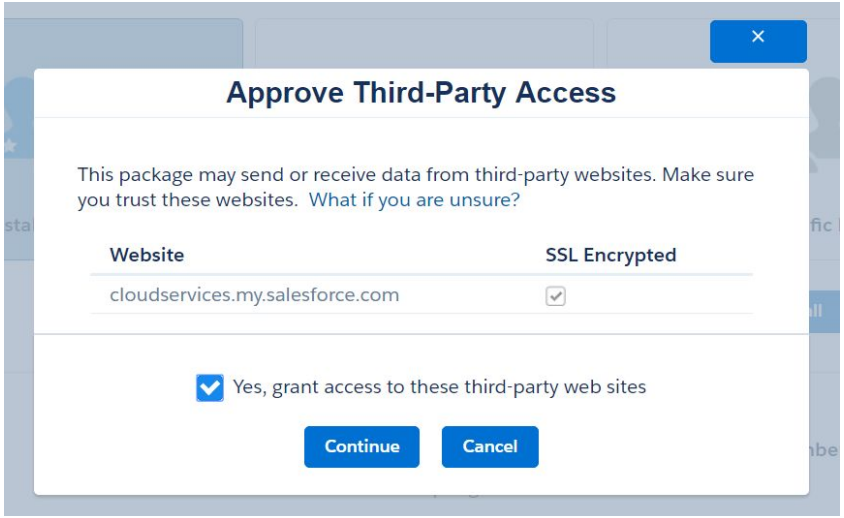


Feedback

For Lightning & Classic

When you click on the Feedback button in the bottom left for the first time you will be prompted to approve third-party access and set up remote site settings, which are required, before you can send your feedback back to Salesforce from your org.

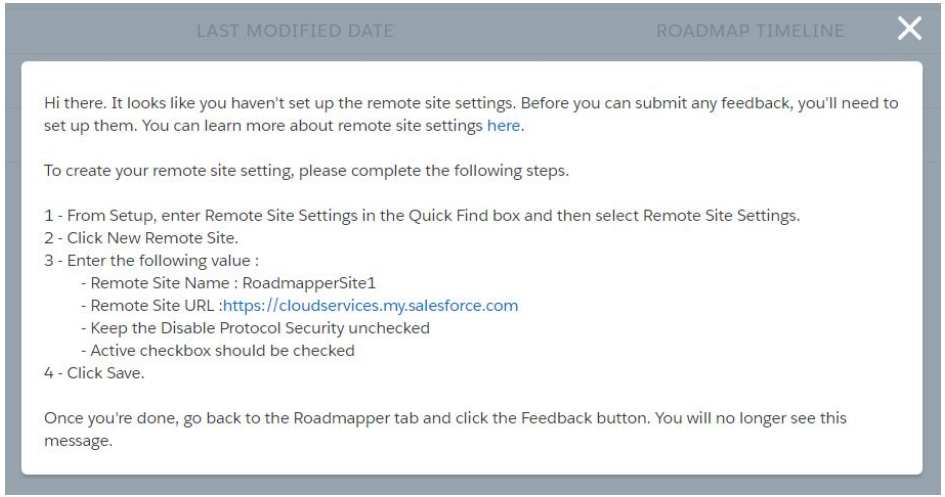
Upon initial installation of the Roadmapper you will be prompted to allow the cloudservices.my.salesforce.com third party access, otherwise you cannot proceed.



Feedback

For Lightning & Classic

Once installed, when you click the Feedback button for the first time, you will be prompted to create a remote site setting related to your org's instance. Once this remote site setting has been set up you will be able to submit feedback.

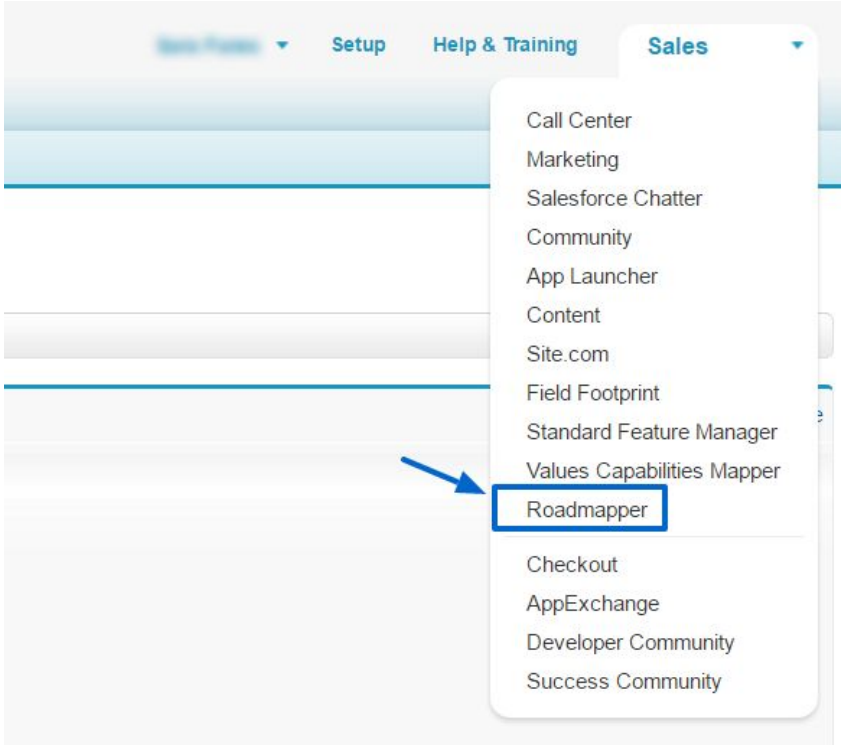


Thank You

Access Instructions

Classic

After you've verified the installation select Roadmapper from the Application Selector in the upper right corner.



Installation Instructions

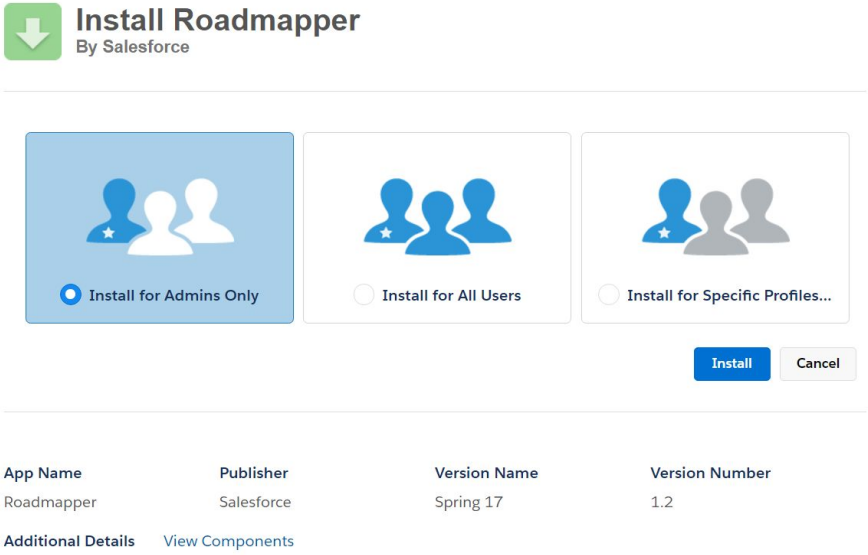
Download & Install

This application is available through a private listing on the Salesforce AppExchange.

Before installing a package to your Salesforce org, please make sure to understand the instructions in the following link: Help Article

Please note that this application will not count against your Salesforce organizational limits.

To install the Roadmapper managed package, click on the installation link provided to you.



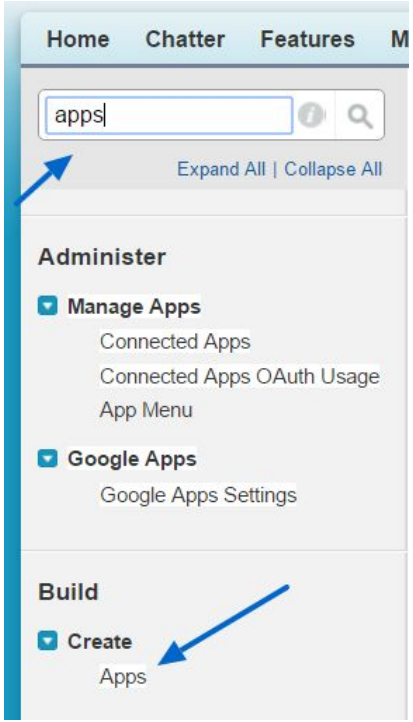
Installation Instructions

Confirm Installation

Once the installation is complete, click on done to be redirected to your Salesforce org

After you've installed the package, check your org to confirm this package has installed properly

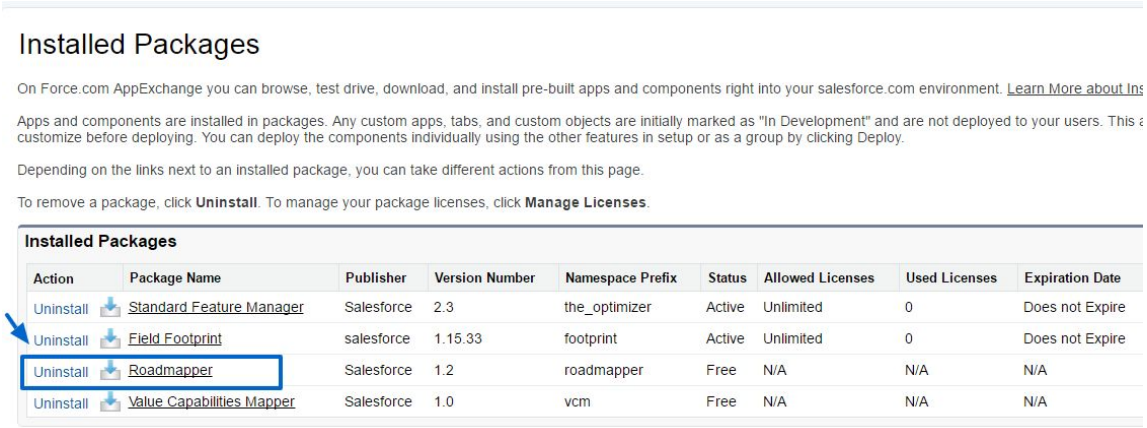
From Setup, enter Apps in the Quick Find box, then select Apps to see the list of apps that are installed in your organization.



Installation Instructions

Confirm Installation

Find the Roadmapper installed package.



Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. Learn More about Ins

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This a customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date
Uninstall	Standard Feature Manager	Salesforce	2.3	the_optimizer	Active	Unlimited	0	Does not Expire
Uninstall	Field Footprint	salesforce	1.15.33	footprint	Active	Unlimited	0	Does not Expire
Uninstall	Roadmapper	Salesforce	1.2	roadmapper	Free	N/A	N/A	N/A
Uninstall	Value Capabilities Mapper	Salesforce	1.0	vcm	Free	N/A	N/A	N/A