Why do we need the Functional Area Roadmap?
- The Functional Area Roadmap gives the PRC and ITCRB an idea of what projects to expect in coming years.
- This enables a comprehensive view of incoming projects, as well as a sense of what demands on funding and resources can be expected.
- These roadmaps can also be used to identify projects with related goals and dependencies.

How does a project appear on the Functional Area Roadmap?
- Demands created in ServiceNow (see here for a guide on how to create a demand) will not automatically appear on the roadmap, regardless of who makes them.
- For a demand to appear on the Roadmap, several characteristics must be properly entered in ServiceNow (see page 3).
- Legacy projects – projects that were created before the Demand module was implemented in ServiceNow in 2016 – do not have a matching Demand record. However, certain legacy projects will be included on the Roadmap. See page 6 for instructions.
Functional Area Roadmaps – Process

Create and Submit Demand
- See instructions for details

Check Essential Characteristics
- Qualified or Approved Status
- “On Roadmap” box checked
- Functional Area portfolio included
- Phase dates in current FY or beyond

QlikView Updates Automatically
- Database is refreshed from ServiceNow every two hours during business hours
- First refresh at 9:00am
- Last refresh at 5:00pm
- Any changes in ServiceNow reflected only after refresh

Open in QlikView
- Apply relevant filters for your functional area
- Select additional dimensions to show

Export to Excel
Functional Area Roadmap – Adding Essential Characteristics

Demand records must have the following characteristics in order to show on the report:

1. Status must be either “Qualified” or “Approved”
2. “On Roadmap” box must be checked
3. Portfolio should match one of the functional areas:
   - Alumni Affairs and Development
   - Financial Administration
   - Harvard Human Resources
   - Harvard University Information Technology
   - Research Administration and Compliance
4. Phase dates must be in the current fiscal year and/or beyond
   - Projects with phase dates entirely in the past will not be shown.
5. Projects on a roadmap may also be related to an IT Strategic Goal. If applicable, select the IT Strategic Goal.
From ServiceNow to QlikView – Where the Data Goes

The data for the roadmaps comes from the corresponding numbered fields and tables in ServiceNow.
Functional Area Roadmaps – Opening in QlikView and Exporting

While Roadmap data is captured and stored in ServiceNow, the actual Roadmaps are created in QlikView. Data from ServiceNow is refreshed every two hours on business days, 9am to 5pm.

1. No filters are applied the first time the Roadmap dashboard is opened. Click a button for a Functional Area to apply the appropriate filter.
2. Select additional dimensions, which will be added to the roadmap in the default order.
3. The roadmap may be exported to Excel by clicking on the icon at the top right of the roadmap. Formatting (except for merged cells) is retained.

Link to ServiceNow:
https://harvard.service-now.com/navpage.do

Link to QlikView Access Point:
https://qlik.huit.harvard.edu/qlikview/
Functional Area Roadmaps – Legacy Projects

- Legacy projects, i.e., projects that were created before the Demand module was implemented in 2016, will not have a matching Demand record.
- For these projects, a script creates a “dummy” Demand record.
- In order for the script to create the “dummy” Demand record – and therefore include it in the roadmap – the project must have the following characteristics:
  - The “On Roadmap” project field must be checked.
  - The Project must be in one of the Functional Area portfolios: Alumni Affairs and Development, Financial Administration, Harvard Human Resources, Harvard University Information Technology, or Research Admin & Compliance.
  - The functional area roadmap portfolio must be the Primary Portfolio on the project record. (For assistance with this, please call or email Ellen Landsman.)
  - The Project must be active in the current fiscal year and/or beyond.
  - If applicable, IT Strategic Goal information must be completed on the Project record.
- Eventually, these projects will roll off the roadmap as they are completed, and only Demand records will be used.