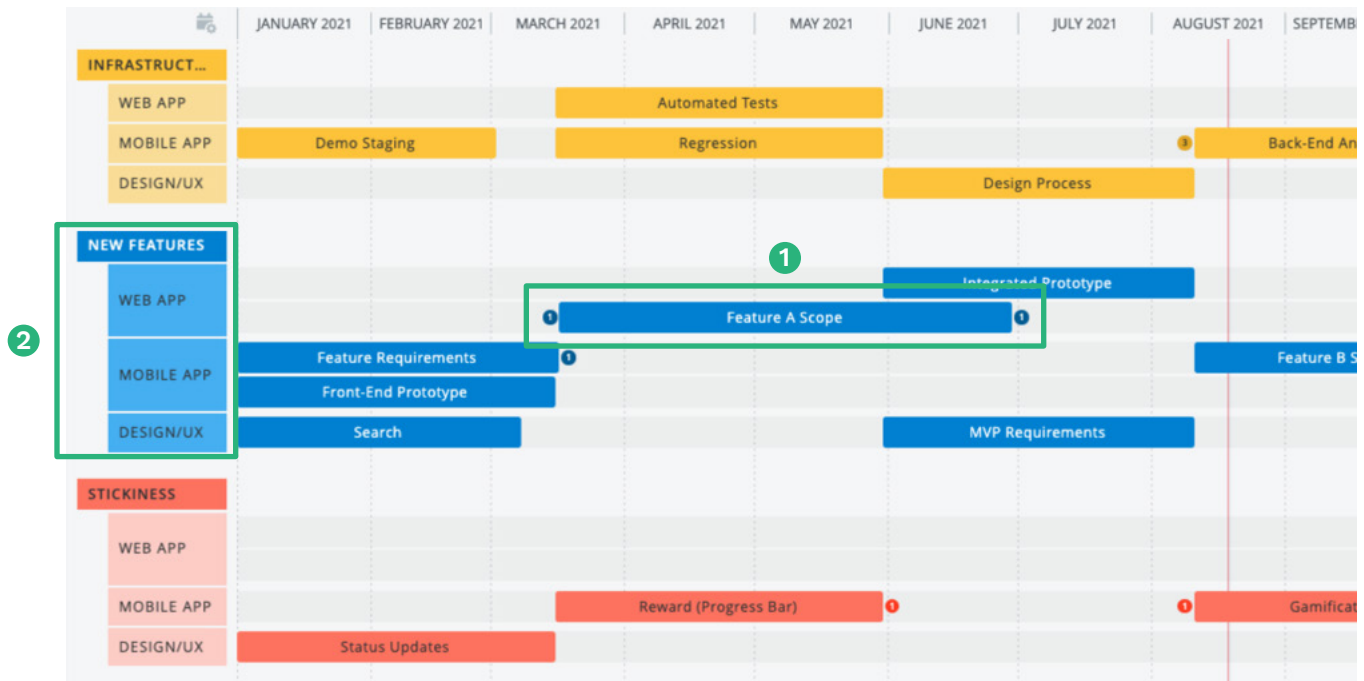




Roadmunk Product Tour

The Roadmap



1 Items

The items you see on the roadmap are the **tasks, projects, or initiatives** that you're planning to accomplish. Items are organized on your roadmap by the details that you give them - we call these "Headers".

2 Headers

This is one of your roadmap Headers - Headers are used to filter your items so that you can control how your Items are displayed on your roadmap. When we make headers in the Items table, we call them "**Fields**".

Items Table

The Items Table is the backend of your roadmap. It includes all of the tasks that you plan to deliver and their details.

Fields are the column headers of the Items Table. We use Fields for two purposes:

- To give our Items rich information
- As roadmap headers to filter Items for different visualizations

<input type="checkbox"/>	Items	↓ Date	⌵ Sprint (Agile .. 2	⌵ Theme (Agile...	⌵ Vertical (Agil...
1	Archiving	Jan 1, 2022 – Mar 17, 2022 1	1.2	New Features	Design/UX
2	Mobile Delighter (...)	Jan 1, 2022 – Mar 13, 2022 1	1.3	Stickiness	Mobile App
3	Undo Function	Oct 16, 2021 – Dec 31, 2021	2.2	New Features	Web App
4	Metrics	Oct 16, 2021 – Dec 31, 2021 1	2.2	Infrastructure	Web App
5	Desktop Delighte...	Oct 16, 2021 – Dec 31, 2021	2.2	Stickiness	Web App
6	Onboarding Flow	Oct 17, 2021 – Dec 31, 2021 1	1.2	Stickiness	Web App
7	Performance Ove...	Oct 16, 2021 – Dec 31, 2021 3	2.2	Improvements	Mobile App
8	Marketo	Oct 16, 2021 – Dec 31, 2021	2.2	Integrations	Web App
9	HipChat	Oct 16, 2021 – Dec 31, 2021	2.2	Integrations	Design/UX

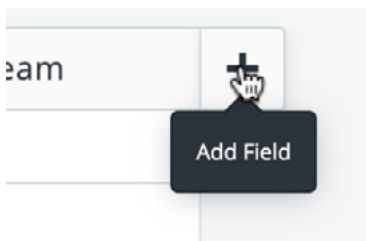
1 Creating Items

<input type="checkbox"/>	Items
1	Create a Roadmap
2	Evaluate Stakehol...
+	Add new item

There are a few ways to create a new Item:

- Click between rows
- Click "Add new item" at the bottom of the table
- Click the "+ Item" button at top right of the screen
- Press "Enter" after manually entering an Item

2 Creating Fields



To create a new field click on the "+" located to the right of the very last field on your Item table. This will open up the Field creation modal. In order to create a Field you need three things:

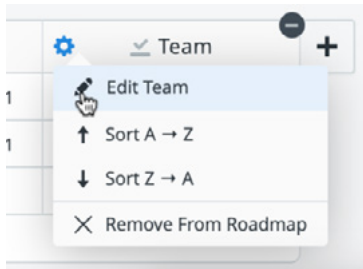
- Field name
- Data type
- Values


Editing Items in the Items Table

There are two ways to edit an Item in the Items table:

1. Change the individual field value of the item that you want to change, or
2. Click on the Item name - this will open up the Item details modal where you can change multiple fields, add Item description, and leave comments.

Editing Fields in the Items Table

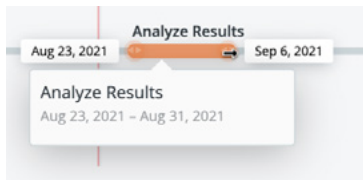


In order to edit a Field that is already created, hover over the Field. To the left of the Field name, click on the  icon to edit the Field name, data type, or value or delete the Field entirely. This will permanently delete the Field.

Editing Items & Fields in the Roadmap View

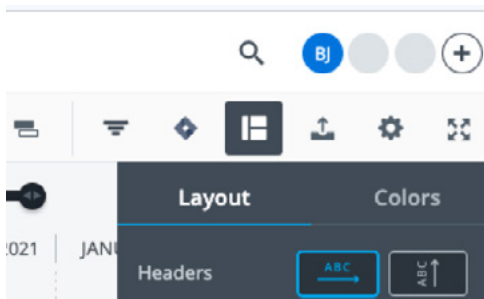
When reviewing your roadmap with a manager, peer, or customer you may receive feedback that changes certain items.

You can change the details (or Field values) of individual items by clicking an item on the roadmap which will open up the Item details modal. Here you can change field values, set a description, or leave comments.



Additionally, if the field you want to change is set as the header for the roadmap you can drag-and-drop the item into the new header. This also works with changing dates when you're in timeline views.

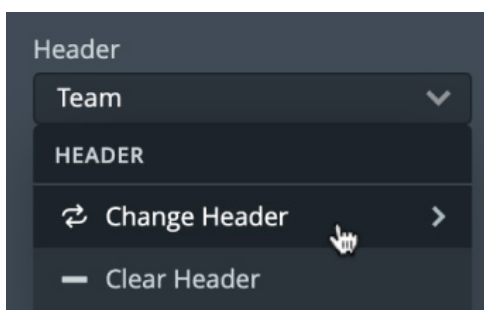
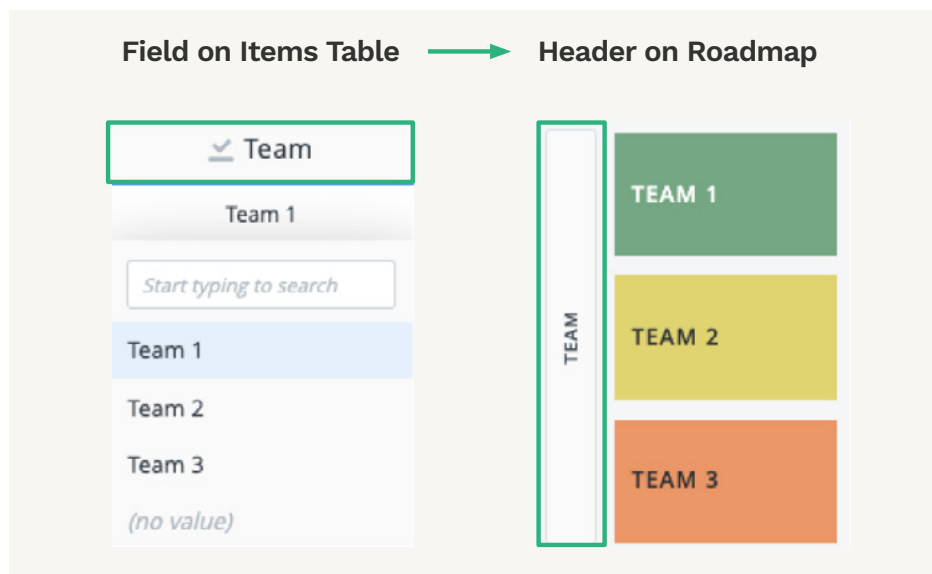
The Format Panel



The Format Panel is the central location for making your Roadmap organized. It is located on the **right side of the nav bar** (☰). If you want to control how your items are displayed, you can make those customizations here.

Changing Headers

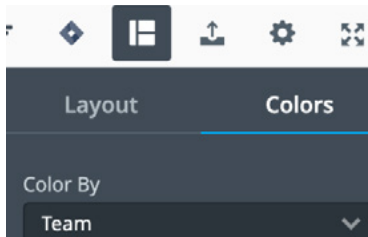
Headers are the top level of organization for your roadmap. They come from the Fields you create in your items table. The values of your Fields become the titles of the headers, as shown on the right.



To change a header open up the format pannel and go to the **“Layout”** section. Select the field you want as your header in the dropdown menu below.

Additionally, toggle **“Hide empty headers”** to clean up your roadmap.

Colors



Click on the “**Colors**” tab in the format panel. Here you can customize the color palette of your roadmap. Colors help to visually organize your data making your roadmap easier to understand.


Changing Colors

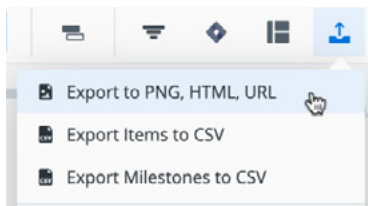
Colors are assigned based on a field of your choosing. This can be an opportunity to add additional information through color.

To change a color select a Field in the drop down menu called “**Color By**”. It is recommended to select a field that is a header or subheader.

You can pick from the three pre-made color palette options or you can customize your own. You can even make a palette for your brand. This is a paid feature, you may want to [book a meeting](#) with an account executive to discuss.

Exporting your Roadmap

To export and share with others, click the **Export** function (). There are multiple ways to share and export your roadmap including PNG, HTML (embedable), Shareable URL, and CSV.



Choose your desired method and when you’re ready to publish, click the big blue “**Publish**” button in the bottom right.

Looking for more?



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Here you can check out more features and learn the processes we teach customers like Visa, NASA, and Amazon.

<https://learn.roadmunk.com/>



Check out our PM Guides

We've learned quite a bit from helping 100s of product teams with their roadmaps. Learn how to manage feedback, prioritize ideas, or plan agile sprints with ease!

<https://roadmunk.com/guides/>



Talk to an Account Executive

Need help with a specific use case? Get in touch with an Account Executive to get you all the information you need.

[Book a meeting](#)