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Advanced Roadmaps in Jira Software

- Key concepts

Create a plan with Advanced Roadmaps

Advanced Roadmaps

Advanced Roadmaps for Jira Software allows you to plan and track work strategically across multiple teams and projects. Designed to empower teams at scale, you can plan based on capacity, track dependencies, manage competing priorities, and explore alternative scenarios with a single source of truth into the current and future health of your initiatives.

Advanced Roadmaps accesses boards, projects, and filters in Jira Software to visualize data in a customizable interface. Functioning as a sandbox environment, you can plan and experiment before updating your original data in Jira Software. In one click you can establish your plan's critical path, explore different variations, and update your Jira Software interface.

This guide explains the key concepts of Advanced Roadmaps including how to create your first plan and the best practices for a seamless planning experience.

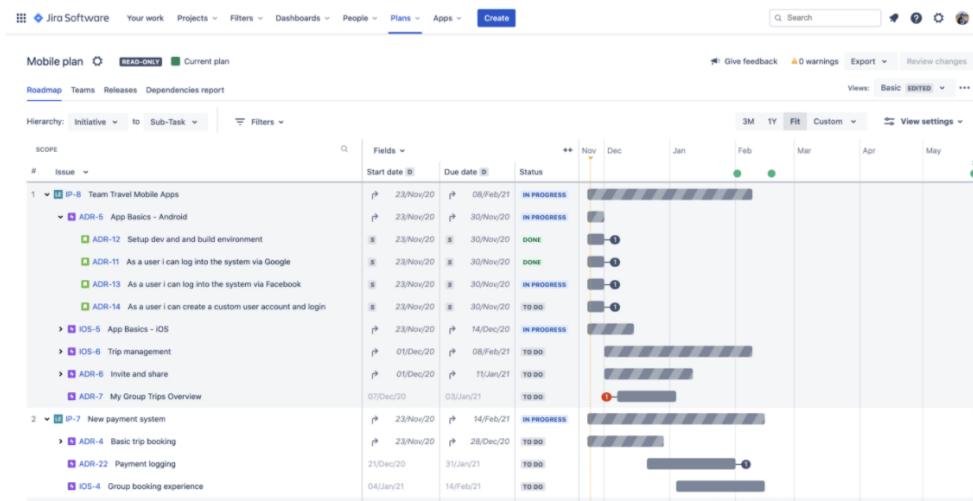
Advanced Roadmaps is available as part of [Jira Software Premium](#), try it free.

Key concepts

Plan

A plan is a shared source of truth that outlines organizational goals and communicates a path for teams to achieve milestones and key results. In Advanced Roadmaps, a plan combines the roadmaps of multiple teams working across multiple projects and ladders them to company-wide initiatives.

The benefit of using a plan is that it establishes the bigger picture and shows how a team's work relates to the work of other teams. It visualizes how each team contributes to broad organizational goals.



Issue sources

Issue sources determine what data will be used in Jira Software to create a plan. They outline the work to be done and the problems you're trying to solve. Issue sources are first selected during plan creation and can be adjusted at any time.

Advanced Roadmaps has three types of issue sources:

- Boards (scrum or kanban) – Issues related to teams that track the volume and progress of their work. Boards can be classified as either scrum or kanban. Scrum boards are for teams that plan their work in sprints or iterations while kanban boards are better suited for teams with a continuous flow of work.
- Projects – Issues defined by a specific objective or deliverable, such as a product or feature.
- Filters – Issues defined by a query in Jira Software, otherwise known as JQL (Jira Query Language).

To further configure your Advanced Roadmaps plans, [learn more about plan settings](#).



Tip: If you'd like to plan sprints in Advanced Roadmaps, use scrum boards as an issue source to unlock sprint planning features.

Since kanban teams don't work in sprints, work is planned based on available weekly hours.

Issue sources

Issues in plan: 19

Issue sources form the scope of your plan. If you can't find a specific issue, [learn more about missing issues](#).

Board PLAT board

Board SCRUM board

Board Choose board...

+ Add another

- IN board
- KT board
- PCTEST board
- LPC board
- Kannier Ban
- Test board
- BW board
- TT board
- IOS board

Exclusion rules

Exclusion rules allow you to refine your plan's issue sources so the most relevant issues are displayed. Depending on your focus, you can set rules to exclude specific issue types, statuses, or releases. You can also adjust how long you'd like completed issues to stay in your plan.

To set exclusion rules:

1 Go to  > **Configure**.

2 Select **Exclusion rules**.



Tip: Set exclusion rules to bring focus to a dense and complicated plan.

Refine issues displayed

Issues in plan: 17

Set rules to exclude issues you don't need to see in this plan. These rules can be changed later.

Exclude any completed issues after*

30 days

Any issues marked as Done for more than 30 days won't show in the plan. [Learn more](#)

Exclude issue types

Type: Bug



Exclude statuses

Status: All Done Statuses



Exclude releases

[View releases](#)

Hierarchy

A hierarchy connects small, process-based tasks to cross-functional deliverables and escalates them to broad organizational objectives. Depending on how your work is structured, hierarchy levels represent different levels of detail in a plan's scope and show how they're related.

The hierarchy in Advanced Roadmaps is inherited from the default issue types in Jira Software:

- Epic – A large body of work that can be broken down into stories, tasks, and bugs. In a plan, epics represent a significant milestone or deliverable. The work contained in an epic can be assigned across multiple teams.
- Story, task, or bug – Stories and tasks are issues that represent work that needs to be completed. Bugs are problems that impede the progress or functionality of work. These issue types can be assigned to specific teams.
- Subtask – A granular piece of work required to complete a story, task, or bug. In Advanced Roadmaps, subtasks can't have teams assigned specifically to them, they inherit the team assigned to the parent issue.

If you plan and track work across an organization, you'll need to create hierarchy levels above epics. For example, you can create an initiative hierarchy level to represent company-wide goals. When positioned above the epic level, the initiative can be used as a container for epics. For more information about configuring and customizing your hierarchy levels, [click here to learn more](#).

For tips and best practices on configuring the issue hierarchy above epics in Advanced Roadmaps, check out this short video. [Watch now](#)

Advanced Roadmaps hierarchy levels

In plans, your project items are grouped into hierarchy levels. You can change the names of these levels and structure the hierarchy to your needs. Check out our docs to learn more about [how to configure hierarchy levels](#) or [how to expose these levels in Jira](#).

#	Level Name	Jira Issue Types	Actions
1	Odyssey	← Odyssey	Remove
2	Legend	← Legend	Remove
	Epic	← Epic	
	Story	← All other standard issue types	
	Sub-Task	← All sub-task issue types	
	+ Create Level		

Changes to the hierarchy configuration will apply to all existing plans.

[Save changes](#) [Reset](#)

Teams

Since teams can be associated with your plan's issue sources, work can be managed directly in the plan. Teams allow you to group and filter work based on teams and manage the allocation of work based on capacity.

The coordination of teams is usually led by project or program managers, depending on how the work is structured. By prioritizing goals and determining critical paths, they are the drivers and decision-makers of the cross-functional plan. Team and domain leads contribute to the plan by managing capacity and allocating work to their respective teams.

[Learn more about managing teams in Advanced Roadmaps](#)



Tip: The teams field in Advanced Roadmaps is not visible by default in Jira Software. For a seamless planning experience, enable the teams field to display in the Jira Software project you've used as an issue source.

Capacity

Capacity reveals the units of work that a team undertakes in a given period of time. It can be used to estimate a team's ability to complete work by a particular milestone and is invaluable for evaluating risk when making key decisions.

Capacity is added to the plan by team and domain leads who regularly assess their team's availability, resource allocation, and the prioritization of other projects.

Measuring capacity differs between scrum and kanban teams. While both types of teams can measure capacity with time (days or hours), a scrum team can also use story points (a relative estimation of required effort). This is because scrum teams work in time-boxed iterations (sprints), while kanban teams progress through a continual flow of work.

Capacity planning in Advanced Roadmaps is available to both scrum and kanban teams. However, sprint planning is exclusive to teams that use scrum boards as an issue source. The sprint planning feature allows you to allocate work to each sprint, project release dates, or milestones based on teams' capacities. It can also show you when sprints are overbooked (when allocated work exceeds the team's capacity). [Learn more about capacity planning](#).

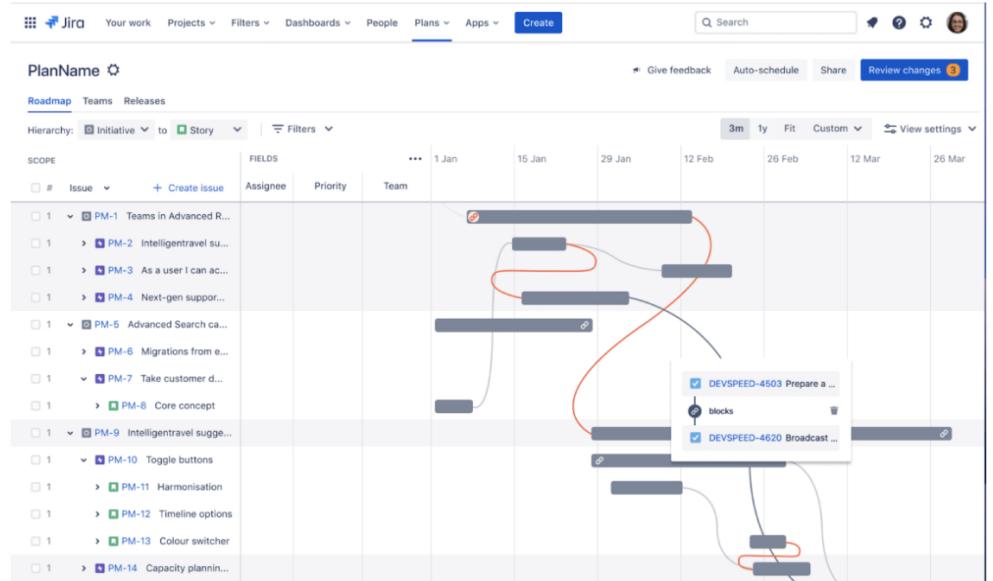
For tips and best practices on effective capacity planning in Advanced Roadmaps, check out this short video. [Watch now](#)

Dependencies

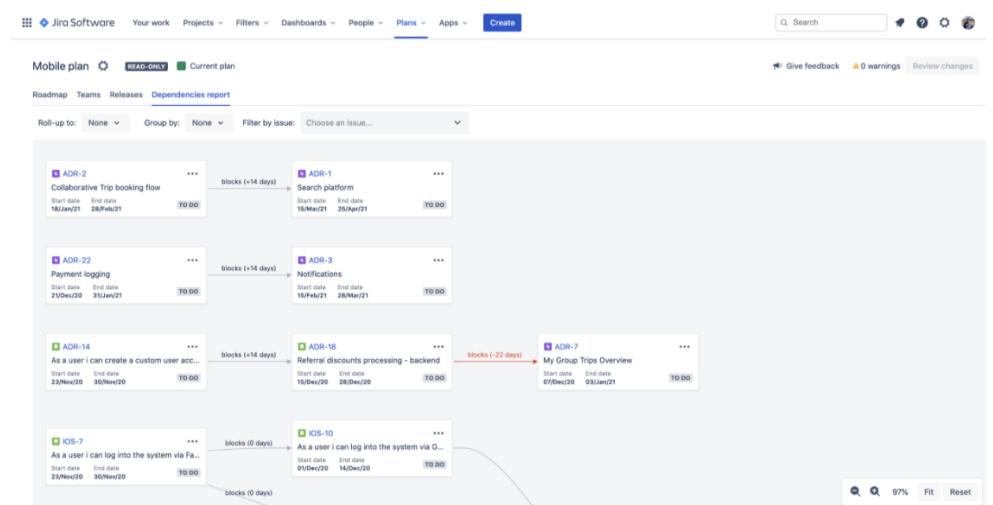
Dependencies show the relationship between issues in your plan, such as contingencies and blockers. Visualizing and understanding dependencies is vital when project or program managers

determine a critical path in the roadmap. When dependencies are thoroughly mapped, a team can adapt and plan for alternative paths.

Dependencies are shown on the timeline by badges, columns, or lines.



You can also view dependencies in the [Dependencies report tab](#), which visually maps relationships between issues in your plan.



A dependency can be incoming or outgoing. It reveals when an issue blocks other issues, or is blocked, and what issues to prioritize to ensure that work progresses.

[Learn more about managing dependencies](#)

Scenarios

Since Advanced Roadmaps functions as a sandbox environment for Jira Software data, you can use scenarios to explore alternative paths to milestones or project completion. Planning with different scenarios allows you to adapt with minimal disruption. You can aim for your best case, plan for your worst case, and be prepared for anything in between.

[Learn more about using scenarios](#)

Scenarios

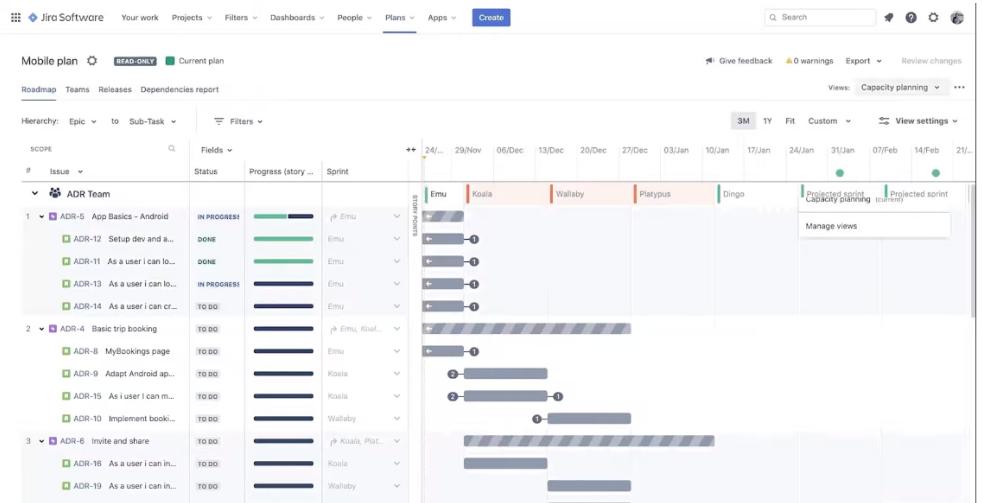
See how specific changes across different scenarios can affect your plan. You can then save to Jira the most realistic scenario for your team.

Title	Color	Actions
Additional resourcing - 5 developers	■	■
Current resourcing - best case (current)	■	■

Saved views

While plans are complex by nature, saved views allow you to tailor your plan for different audiences. This is particularly useful for large, cross-functional projects, where different stakeholders view your plan with specific concerns or needs in mind. Customize your plan to emphasize different aspects and save it as a view that can be easily accessed at any time.

[Learn how to create saved views](#)



Releases

Releases are the milestones in a plan that marks a point in time when work needs to be completed. Depending on how your work is structured, a release can represent a shippable chunk of work, a