



VIRGINIA  
IT AGENCY

## **Planview - Portfolio and AgilePlace Connector**

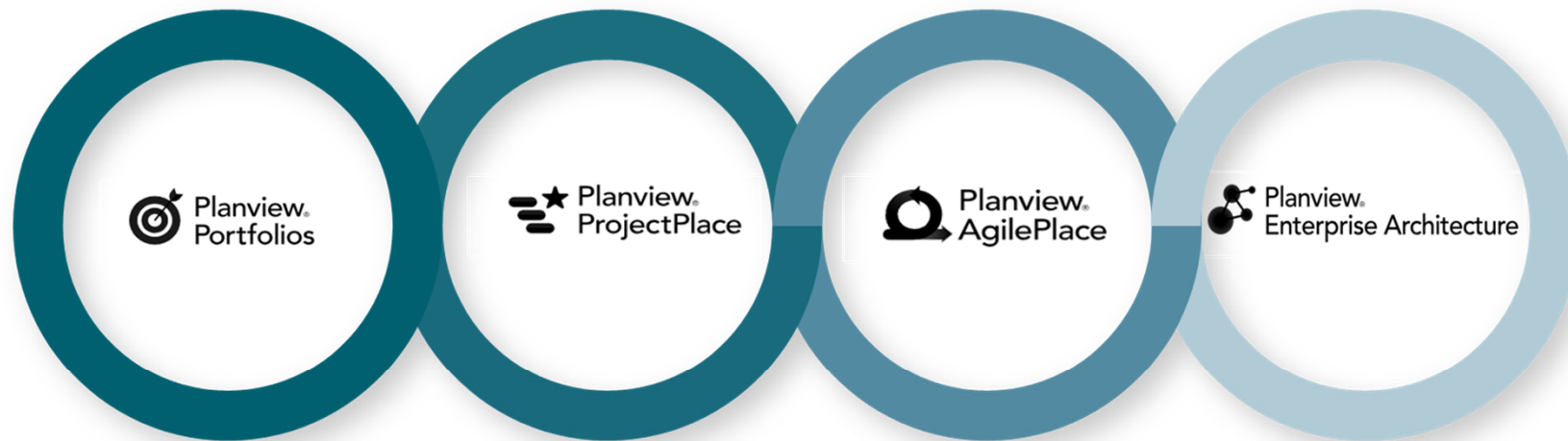
Sonia Varney – Planview Administrator  
Barbara Bronson – PMD Consultant

November 1,2023

## Agenda

- Planview Overview
- AgilePlace
  - Key Capabilities
  - Overview
  - Reporting
- Syncing Portfolio Project to AgilePlace Board

## Planview Components



 Planview.  
Portfolios

Planning  
Strategy  
Delivery  
Results

 Planview.  
ProjectPlace

Capacity Planning  
Work Management  
Resource Management  
Project Portfolio  
Planning  
Project Team Delivery

 Planview.  
AgilePlace

Agile Program  
Management  
Agile Team Delivery  
Objectives and Key  
Results

 Planview.  
Enterprise Architecture

Enterprise Architecture  
Management

## What is AgilePlace

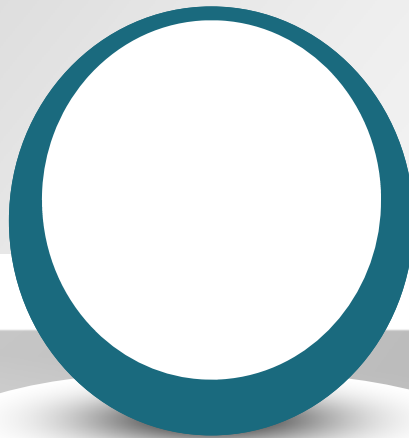
- Visually track and manage the flow of work from strategy to delivery
- Agile Program Management
- Backlog management, quarterly planning and program execution
- Agile Team Delivery
- Execute work based on flexible methodology and processes
- Objectives and Key Results
- Define, align, execute and measure progress towards organizational goals

## Key Capabilities

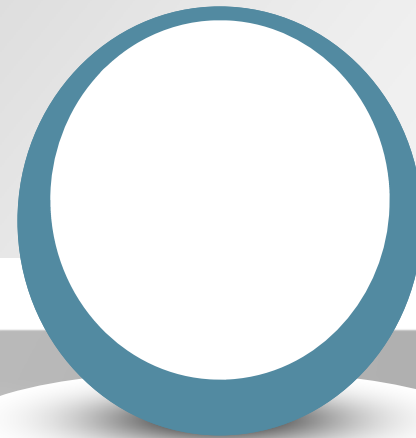
Supports program backlog management, quarterly planning and program execution



Enables work according to your team's preferred methodology and processes



Define, align around, execute and measure progress toward organizational goals



# Agile Delivery

## Home

- Levels
- Boards
- Templates

The screenshot displays a dashboard for managing Agile boards. On the left, a sidebar lists navigation options: 'All Boards', 'Levels' (Portfolio, Program, Projects, Team), and 'Uncategorized Boards'. The main area is divided into two sections. The top section, 'Recent Boards', shows a grid of board thumbnails with titles: 'Test Portfolio Training Board for Demo - BB', 'Program Board testing for Demo', 'VITA Active Projects Portfolio', 'BB test Board', 'Alexa test board', and 'VBPM Support'. Below this is another 'All Boards' section with thumbnails for 'Alexa test board' and 'BB tes'. The bottom section, 'Boards Templates', is open and shows a list of templates: 'Agile Scrum Board Template', 'Agile Scrum Board Template V2', 'Business Template', 'Dev Ops Kanban Board Template', 'Kanban Board Simple', and 'Waterfall Template'. Below the templates, there is a section for 'Engineering Operations & Manufacturing Boards' with a single template 'Iterative Deming PDCA'.

# Agile Delivery

## Kanban

- Boards
- Flexibility in lanes
- WIP



# Agile Delivery

## Cards

- Details regarding work

The screenshot shows the 'Details' view of a Jira card titled 'Data Merge Capabilities'. The interface is divided into several sections:

- Left Sidebar:** A navigation menu with options: Details (selected), Tasks (7), Parent Cards, Child Cards, Comments (1), Attachments, Key Results, and History and Health.
- Title:** 'Data Merge Capabilities'.
- Description:** A rich text editor with a toolbar (Bold, Italic, Underline, 11pt, Bulleted List, Numbered List, Link, Unlink, Text Color, Background Color, Bold, Italic, Underline, Bold, Italic, Underline, Bold, Italic, Underline, Bold, Italic, Underline). The content includes a 'User Story:' section with a bullet point: 'As a database administrator, I want to automatically merge datasets from different sources so that I can more easily create reports for my internal customers.'
- Assigned Users:** A dropdown menu showing 'Barbara B.' with a close button.
- Planned Start:** A date picker set to '10/25/2023'.
- Planned Finish:** A date picker set to '11/02/2023'.
- Header:** A text field containing 'Sprint 2'.
- Priority:** A dropdown menu set to 'Normal' and a toggle switch for 'Unblocked'.
- Class of Service:** A dropdown menu set to 'Project Delivery'.
- Lane:** A dropdown menu set to 'In Progress'.
- Parent Card:** A dropdown menu set to 'No Association'.
- Mirror from parent card:** A toggle switch that is currently turned off.
- External Link:** A text field containing 'http://www.example.com'.
- AgilePlace:** A text field containing 'AgilePlace'.
- Card Type and Size:** A dropdown menu set to 'Sprint' and a size field set to '5'.
- Tags:** A text field containing '#Sprint2'.
- Buttons:** 'Save', 'Close', and a menu icon.
- Bottom Right:** A 'Copy Card URL' button.

In the bottom left corner, there is a small thumbnail of the card, showing the title 'Data Merge Capabilities', a progress indicator '1 OF 7', and a 'Sprint 2' label.



## Reporting

- AgilePlace provides analytic capabilities to help you measure the performance of your process or value stream.
  - Speed- Duration to complete cards
  - Distribution – Current distribution of cards on board to help understand capacity
  - Efficiency – Help determine if a card is active or inactive
  - Planned Percent Complete – Compares planned finish to actual finish to determine if work is completed on time
  - Burndown – Visualize the progress and shows remaining work in a sprint
  - Exceptions – Helps call out problem child cards ( Blocked, missed start/finish) or stale work
  - Flow – Amount of work in progress by lanes
  - Assigned User – Distribution of assigned work by users
  - Timeline - Gantt chart view of outstanding work

## AgilePlace

### Wrap-up

- Unlimited boards to enable process and work visualization across organizational boundaries
- Real time status of work deliverable
- Collaboration tools (Instant coffee, Whiteboards)
- End-to-end delivery from OKR's to long-term roadmaps

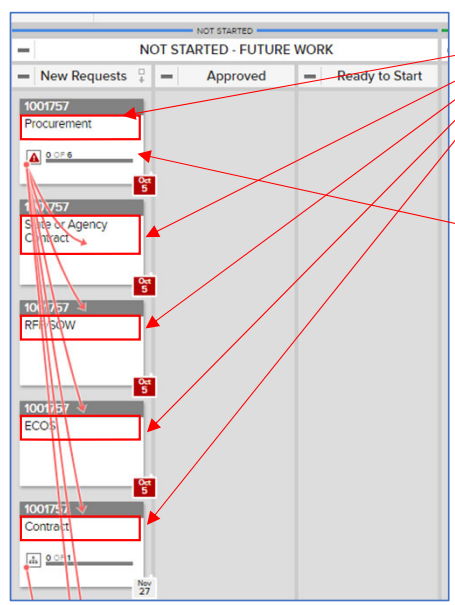
## Syncing Portfolio Project to AgilePlace Board

### Why sync your Portfolios project to AgilePlace board

- Manage detail of the project in a more agile manner
- Easily visualize tasks progression from start to finish via Kanban boards
- Update progress of tasks in Portfolios as cards are moved in AgilePlace

# Syncing Portfolio Project to AgilePlace Board

## Portfolios



Card Name/Task Name

Parent Card

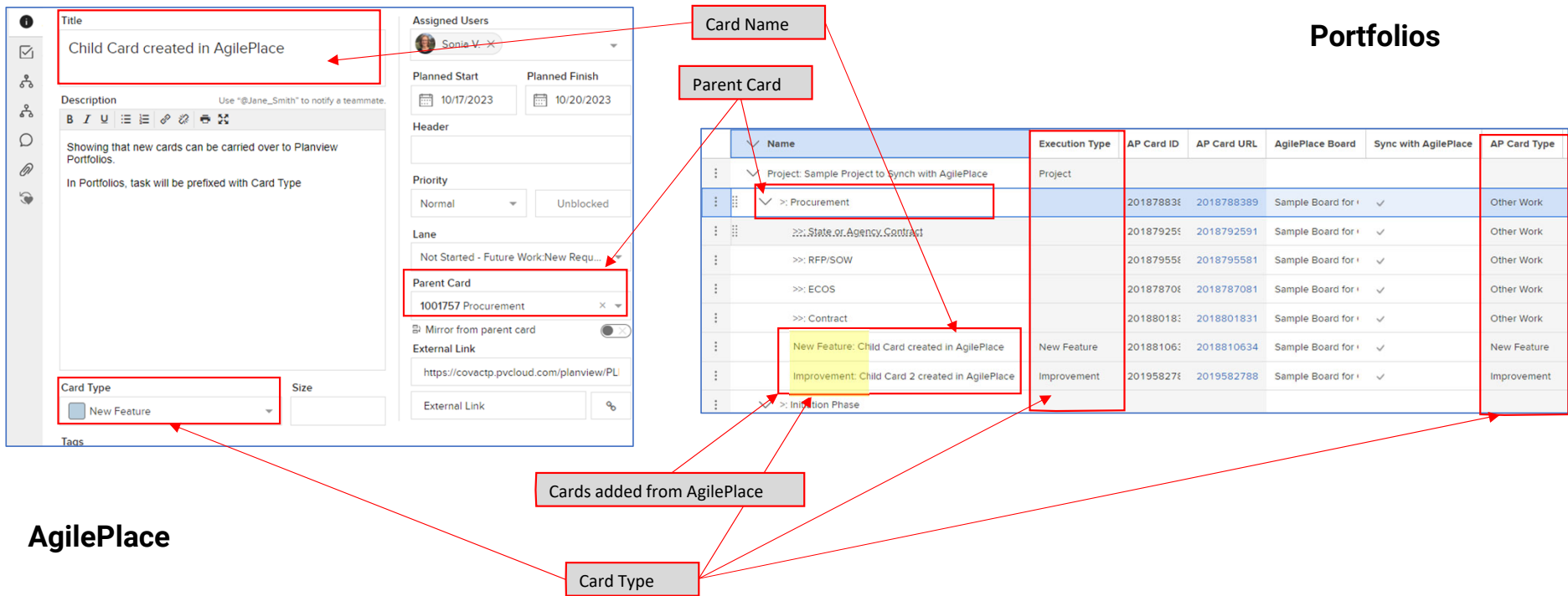
Name	Execution Type	AP Card ID	AP Card URL	AgilePlace Board	Sync with AgilePlace	AP Card Type
Project: Sample Project to Synch with AgilePlace	Project					
Procurement		201878838	2018788389	Sample Board for i	✓	Other Work
>>> State or Agency Contract		201879255	2018792591	Sample Board for i	✓	Other Work
>>> RFP/SOW		201879555	2018795581	Sample Board for i	✓	Other Work
>>> ECOS		201878705	2018787081	Sample Board for i	✓	Other Work
>>> Contract		201880185	2018801831	Sample Board for i	✓	Other Work
New Feature: Child Card created in AgilePlace	New Feature	201881065	2018810634	Sample Board for i	✓	New Feature
Improvement: Child Card 2 created in AgilePlace	Improvement	201958275	2019582788	Sample Board for i	✓	Improvement
>>> Initiation Phase						

Cards added from AgilePlace

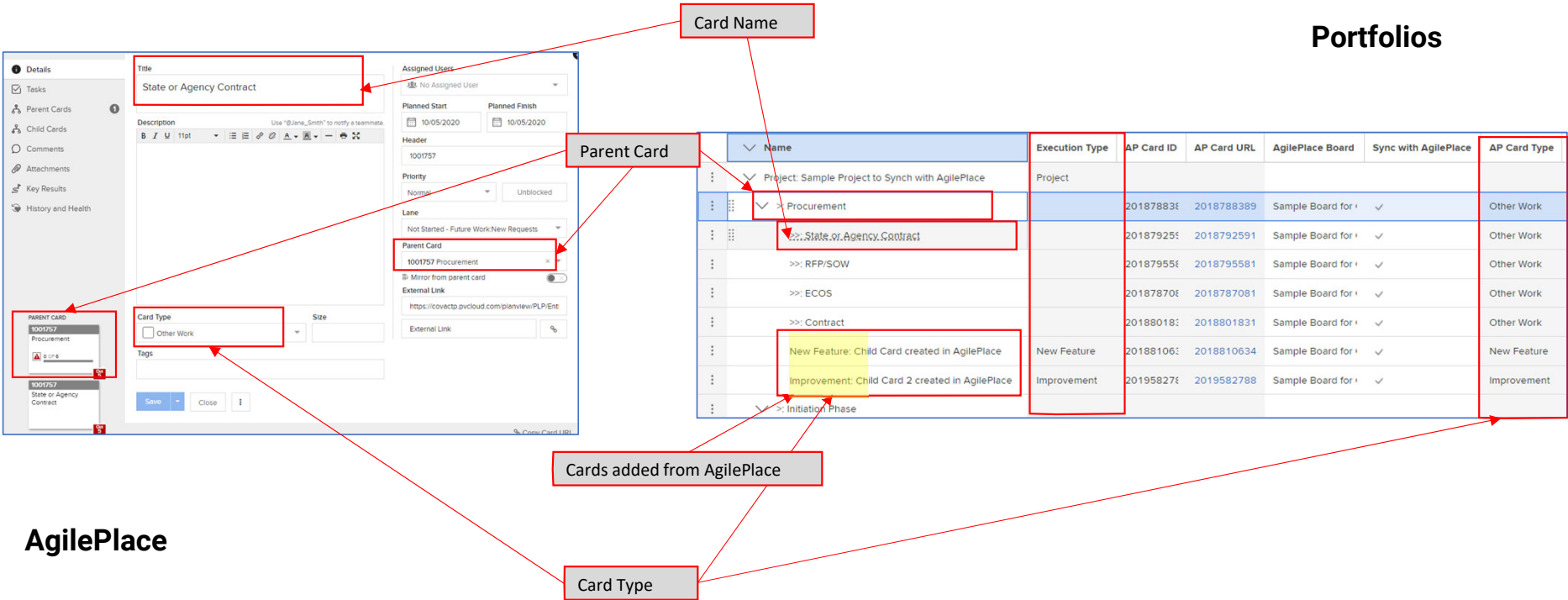
Card Type

AgilePlace

# Syncing Portfolio Project to AgilePlace Board



# Syncing Portfolio Project to AgilePlace Board



AgilePlace

Demo...

Questions?





## Helpful Links

- Planview Customer Success Center:
  - [Configuring the Planview Portfolios and AgilePlace Connector](#)
  - [Planview AgilePlace](#)
- [CTP Website](#)
- [University of Planview](#)
- CTP Administrators Email: [ctpe1admin@vita.virginia.gov](mailto:ctpe1admin@vita.virginia.gov)