VIRGINIA IT AGENCY

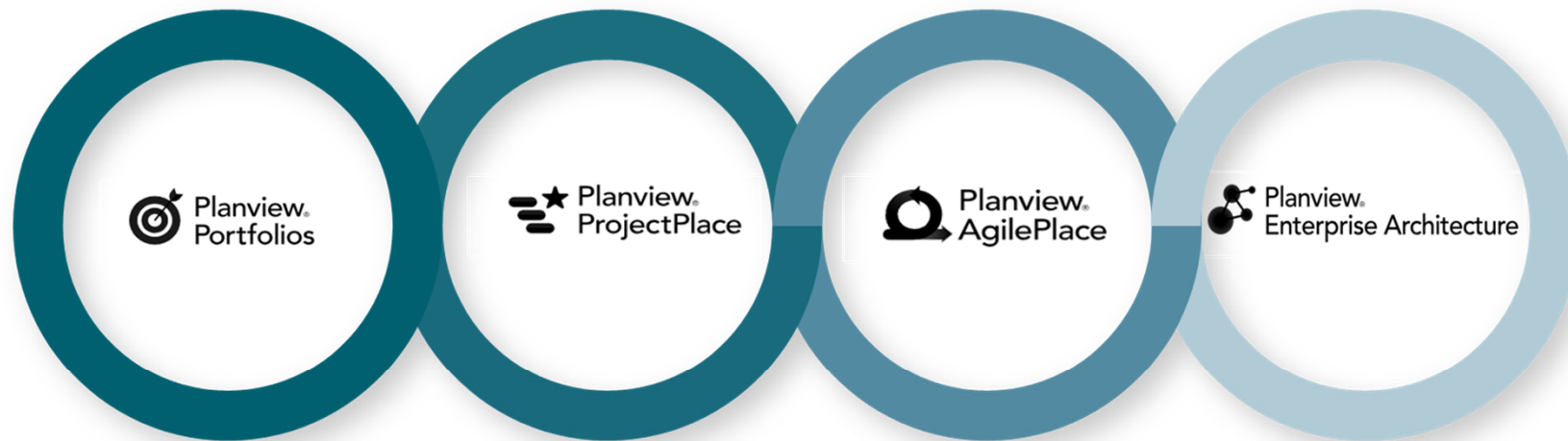# Planview - Portfolio and AgilePlace Connector

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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
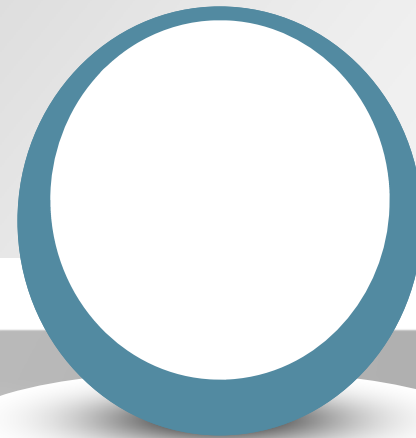
Key Capabilities

Supports program backlog management, quarterly planning and program execution

Enables work according to your team's preferred methodology and processes
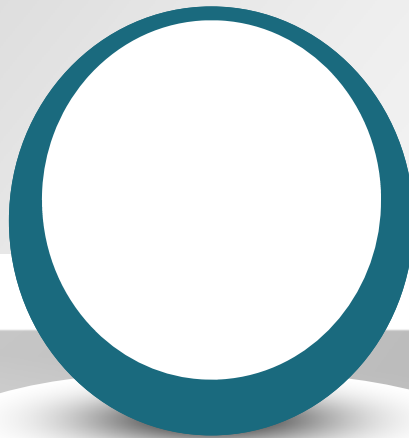
Define, align around, execute and measure progress toward organizational goals

Agile Delivery

Home

- Levels
- Boards
- Templates

Agile Delivery

Kanban

- Boards
- Flexibility in lanes
- WIP

Agile Delivery

Cards

- Details regarding work

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)
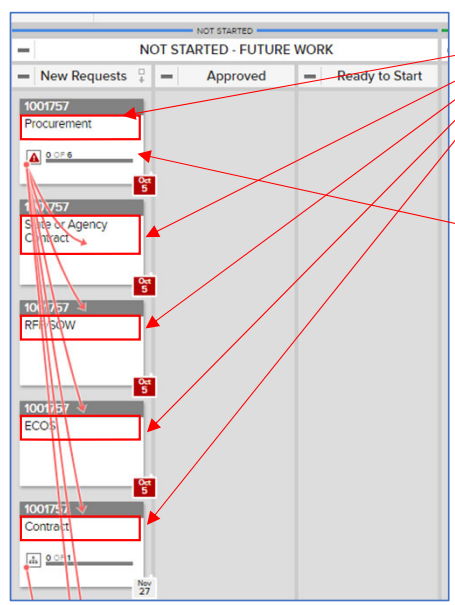- End-to-end delivery from OKR's to long-term roadmaps

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

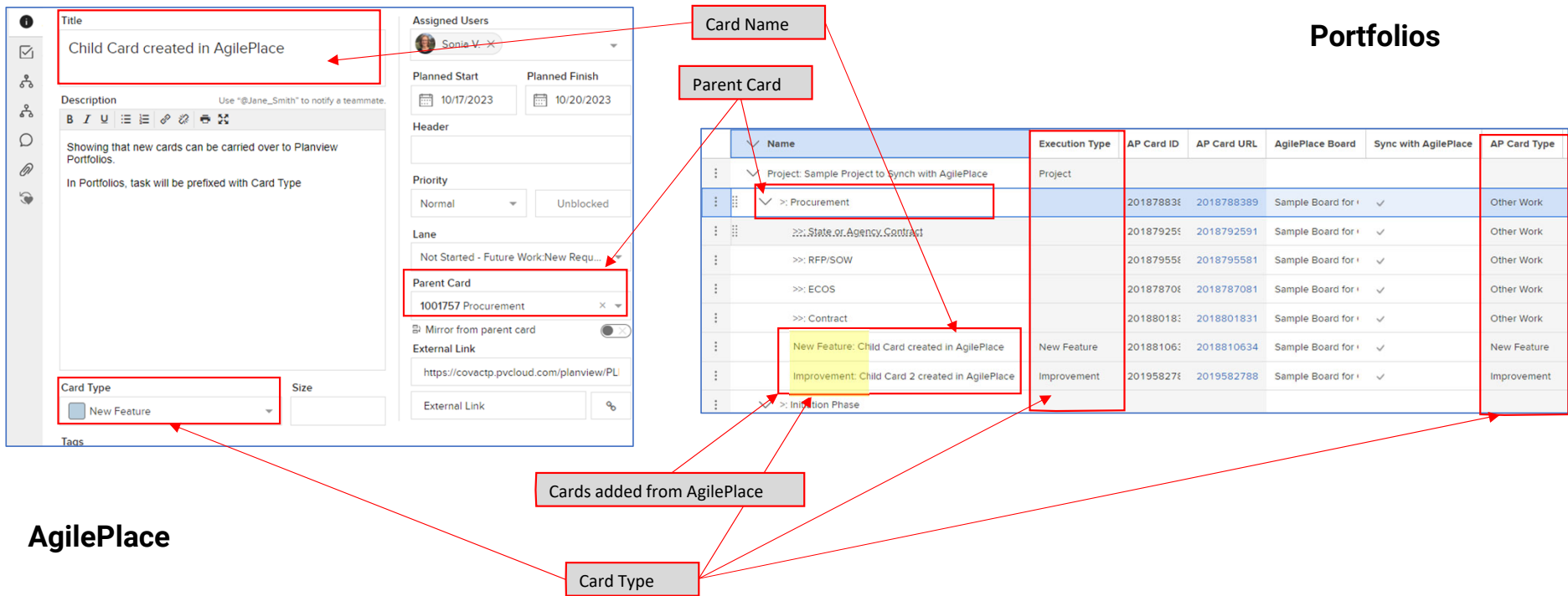**Portfolios**

Card Name/Task Name

Parent Card

Cards added from AgilePlace

Card Type

AgilePlace

Syncing Portfolio Project to AgilePlace Board

Portfolios

AgilePlace

Card Name

Parent Card

Cards added from AgilePlace

Card Type

Syncing Portfolio Project to AgilePlace Board

Portfolios

AgilePlace

Card Name

Parent Card

Cards added from AgilePlace

Card Type

Demo…

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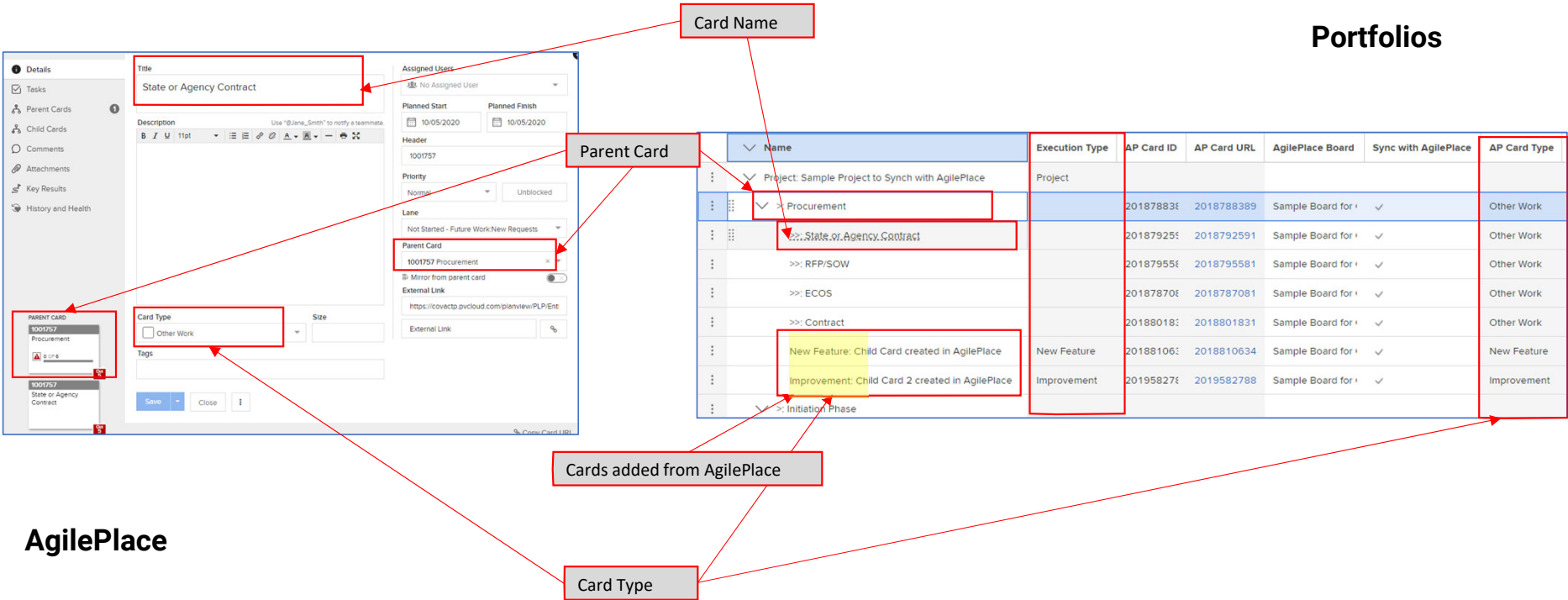
Questions?

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