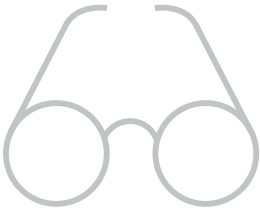


INFOSHEET



Work Management (Planview Enterprise One – Projectplace)

Online Services

Delivery method and duration

Consulting on the Enterprise One-Projectplace Flex option is delivered by an experienced implementation consultant. The package includes consulting on both the Enterprise One-Projectplace integration and the different Projectplace use cases. It also includes Projectplace enablement training for users at various levels of tool engagement. Planview will take a consultative approach to help the customer envision and build out company processes in Projectplace. Member and administrator enablement training on the tool will be customized to the customer's needs and processes and adjusted to number of resources to be onboarded.

Assumptions

- The Enterprise One - Projectplace integration is installed and configured. Initially this will be set up in the Sandbox environment in order to demo and test the integrated solution. Once agreed, the installation and configuration will be completed in the Production Environment.
- The customer will assign a project owner (Projectplace account administrator) to act as the main point of contact. This person will carry the responsibility for scheduling enablement training for other customer resources.
- The project owner will organize groups with a maximum of 20 resources to participate in the enablement training workshops.
- The customer will identify subject matter experts who will have a say in how the customer process(es) will be set up in Projectplace.
- The customer is responsible for providing information about their work process(es), preferred project template(s) and their portfolio KPIs.

Parties involved	Agenda	Estimates
Project kick-off		
Planview; Projectplace consultant	<ul style="list-style-type: none"> • A quick overview of Projectplace and Planview • The customer's needs and experience level • The services package plan and timeline 	1 hour
Customer; project sponsor, account owner/ administrator(s)	<ul style="list-style-type: none"> • Go-Live-Date • Discussion on customer involvement 	
Outcome		
<ul style="list-style-type: none"> • To have the implementation workshops scheduled • Identification of customer resources who will join which workshops 		
Integration workshop		
Planview; Projectplace consultant	<ul style="list-style-type: none"> • Overview of the Enterprise One – Projectplace integration points and use cases • Enablement training on how to sync projects over to Projectplace • Enablement training on how to sync templates over to Projectplace • Overview of data which syncs between E1 / PPM Pro and Projectplace 	1-4 hours
Customer; Project Managers & Enterprise One administrators		
Outcome		
Enterprise One Users with the required access to projects will be able to:		
<ul style="list-style-type: none"> • Sync over projects and templates • Find Projectplace data points in Enterprise One to report on • Track the progress of Projectplace workspaces in Enterprise One 		
Account administration		
Planview; Projectplace consultant	<ul style="list-style-type: none"> • Enablement training on account administration • Introduction of Projectplace tools above workspace level • Identification of Projectplace tools necessary to support customer process(es) 	1 hour
Customer; Projectplace account administrator(s)		
Outcome		
Account administrator(s) will be able to:		
<ul style="list-style-type: none"> • Navigate the account administration section • Manage account settings • Manage account users and access rights • Manage requests • Manage portfolios • Work with the workload tool • Navigate template 		

Parties involved	Agenda	Estimates
Process Consulting		
Planview; Projectplace consultant	<ul style="list-style-type: none"> • Discussion on customer process(es) around project management and/ or BAU work • Advice on how to build these processes in Projectplace 	2 hours
Customer; Project Sponsor and experts on company process(es)	<ul style="list-style-type: none"> • Building templates in Projectplace which support customer process(es) • Building out other parts of the tool such as roadmaps, request forms, portfolios including KPI's and teams if applicable 	hands-on consultancy

Outcome

- A clear understanding of how Projectplace will support the customer's work process(es)
- A clear understanding of what a. o. a portfolio, a request, a roadmap, a workspace, an activity, a milestone, a board, a card, a folder, a document, a team and a group will represent in the customer process(es)
- The draft of one workspace template and the ability to complete it outside of the workshops
- The draft of roadmaps, request forms/ portfolios with KPI's and teams if applicable and the ability to complete them outside of the workshops

Workspace administration

Planview; Projectplace consultant	Enablement training on: <ul style="list-style-type: none"> • Navigation in Projectplace • How to create/ manage workspaces • How to create/ manage templates 	2 hours
Customer; Project manager(s) and work administrators		

Outcome

- Understanding the principles of collaborating in workspaces
- The ability to create, customize and administrate workspaces
- The ability to manage access rights and create a workspace plan
- The ability to customize boards and to build a document structure
- The ability to track project progress
- The ability to create and manage templates
- The ability to create and manage teams
- The ability to report status to Projectplace portfolios
- The ability to export a time report

Parties involved	Agenda	Estimates
Member enablement		
Planview; Projectplace consultant	Enablement training on:	2 hours
Customer; Project members	<ul style="list-style-type: none"> • Navigation in Projectplace • How to update user account settings • How to install the desktop application • The Personal & the team overview • How to work in a workspace 	hands-on consultancy for 15-20 resources
	<ul style="list-style-type: none"> • Exercises (optional) 	1-hour workshop
Outcome		
	<ul style="list-style-type: none"> • Understanding the principles of collaborating in workspaces • The ability to navigate from the personal overview, to workspaces, to personal user settings • The ability to communicate within Projectplace • The ability to work with boards and cards • The ability to manage work • The ability to work with documents • The ability to report time 	
Follow up and wrap-up		
Planview; Projectplace consultant	<ul style="list-style-type: none"> • Review of customer process(es) build in Projectplace • Make small adjustments to templates or other parts of the tool, if applicable • Q&A after having worked in Projectplace for a while 	1 hour
Customer; Project manager(s) and account administrator(s)		
Outcome		
	<ul style="list-style-type: none"> • All outstanding questions answered • Customer live with Projectplace 	

Free enablement webinars

Aside from providing customized consulting and enablement training, Planview also delivers free enablement webinars on a monthly basis for its entire customer base.

You can sign up for these webinars at success.planview.com/Planview_Training_Services