

# Portfolio Management & Project Delivery



PORTFOLIO MANAGEMENT



WORK MANAGEMENT

The screenshot displays the Planview PPM Pro interface. On the left, there is a 'Task Backlog' table with columns for 'Est Effort', 'Title', and 'Priority'. The main area shows a Gantt chart for a project named 'Hyperspace Bypass'. The Gantt chart has columns for 'Info', 'Duration', 'Est E...', 'Act E...', 'Title', 'Outline', 'Start Date', 'Target Date', 'Complete Date', and 'Category'. The Gantt bars are color-coded by month: September (blue), October (green), November (orange), and December (red). A red double-link icon is overlaid on the Gantt chart.

Est Effort	Title	Priority
5	SSA Details view	High
3	SSA Searchabl...	Medi...
4	UI Grid view	High
4	Ad hoc filter	High
3	New/edit modals	High
10	Entity report so...	High
6	Data Import	High
6	API	High
	Copy entity	Low
	Spreadsheet Edit	Medi...
5	SSA Card view	Low
4	UI Card view	Low
	Print grid	Low
	Bulk Edit	Low
6	SSA Available F...	High

Info	Duration	Est E...	Act E...	Title	Outline	Start Date	Target Date	Complete Date	Category
	59 days	35		All Tasks		8/16/2018 9:00 AM	12/31/2018 5:00 PM		Task
	19 days	18		Initiation	1	8/16/2018 9:00 AM	8/31/2018 5:00 PM		Task
				September	2	9/3/2018 9:00 AM	9/28/2018 5:00 PM		Task
				New SSA ent...	2.1				Story
				Permissions...	2.2				Story
	25 days			October	3	10/1/2018 9:00 AM	11/2/2018 5:00 PM		Task
				November	4	11/5/2018 9:00 AM			Task
				December	5				Task
				Post-Mortem	6				Task

The screenshot displays the Planview Projectplace interface for a project named 'Global SC Collaboration Project'. The main area shows a progress chart with a green circle indicating 62% completion (706 done) and 0% overdue (0 overdue). Below the chart is a list of members. On the right, there is a 'Recent conversations' section with several posts from users like Marcus Klein, Eric Megel, and Allen Perlin. A red double-link icon is overlaid on the progress chart.

Global SC Collaboration Project

For hosted site info, see the SC E1 Demo Site Tracking board:  
URL: <https://planview.searbit.com/board/515495520> - Filter by Tags or your name to get to your site information quickly!  
This also includes Helpful Links to Service Outage Monitors, SC Gold Change Request Board and more...

Milestones

Next milestone

Go to plan

Cards Activities

Total (113)

706 done 62%

0 overdue 0%

Members

Recent conversations

Comment and type @ to notify other people.

Marcus Klein commented: "All members in E1 PRM when a user opens his strategic view, can he see all projects associated to the strategy or can we limit by the user grants? In other words if a user cannot see a project in the work structure, can/does PVE prevent to see it on the strategy..."

Eric Megel posted: "All members in E1 PRM when a user opens his strategic view, can he see all projects associated to the strategy or can we limit by the user grants? In other words if a user cannot see a project in..."

Allen Perlin posted: "All members - Time Sheet Presentation"

Hello All...I have a Mobile demo for PRM. ONLY mobile. Does anyone have any sideware, artifacts, documents for this kind of demo? Thanks in advance!"

# Project Delivery approach

## Current State

- Portfolio-driven project plans
- Team-driven cards metrics flow to portfolio for project manager visibility and reporting
- Team-driven status and progress of work summarized to the portfolio

## 2H 2020 Focus

- Bi-directional cards with iterative work management
- Team-driven project plans
- Issue and Risk management (Project Log connection)
- Requests connection

# Portfolio Management & Agile Delivery



PORTFOLIO MANAGEMENT



WORK MANAGEMENT

The screenshot shows the Planview PPM Pro interface for a project named 'Hyperspace Bypass'. It features a 'Task Backlog' on the left with a search bar and a list of tasks. The main area displays a 'Tasks' table with columns for 'Info', 'Duration', 'Est E...', 'Act E...', 'Title', 'Outline', 'Start Date', 'Target Date', 'Complete Date', and 'Category'. The tasks are organized by month: September, October, November, and December. A red double-circle icon is overlaid on the right side of the screenshot.

Info	Duration	Est E...	Act E...	Title	Outline	Start Date	Target Date	Complete Date	Category
	59 days	35		All Tasks		8/16/2018 9:00 AM	12/31/2018 5:00 PM		Task
	15 days	18		Initiation	1	8/16/2018 9:00 AM	8/31/2018 5:00 PM		Task
				September	2	9/3/2018 9:00 AM	9/28/2018 5:00 PM		Task
				New SSA ent...	2.1				Story
				Permissions...	2.2				Story
	25 days			October	3	10/1/2018 9:00 AM	11/2/2018 5:00 PM		Task
				November	4	11/5/2018 9:00 AM			Task
				December	5				Task
				Post-Mortem	6				Task

The screenshot shows the Planview LeanKit interface for a 'LAD SAFE Program Board - PLT/Showcase'. It displays a Kanban-style board with columns for 'BACKLOG PLANNING', 'In Progress', 'IMPLEMENTING', 'Demo', and 'Delivered'. The board is organized into 'Epic' lanes and 'Team' lanes (Team Charlie, Team Beta, Team Alpha). Each lane contains various tasks and features, with red arrows indicating dependencies and flow between them. The tasks are color-coded and include details like 'NEW HIGH PRIORITY Epic' and 'Epic ENABLER'.

# Agile Delivery approach

## Current State

- Project to card connection between PPM Pro and LeanKit
- Status and progress of work summarized to the portfolio
- Focus is on small, iterative improvements (choose which LeanKit board to send a project to)

## 2H 2020 Focus

- Bi-directional connection between PPM Pro tasks and LeanKit cards
- Ability to automatically calculate delivery costs (Agile Costing)
- Ability to push work from LeanKit to PPM Pro
- Issue and Risk management