



Our Road to Implementation

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Pain Points drove us to change

Need better labor tracking

Needed better demand and capacity planning

Our imperatives drove our implementation

Go live quickly, but do not impede work getting done!

Jira integration was the linchpin

Tasktop sits at the “waterline”






We use custom attributes to control the integration

When setting up Work Records, our users answer a few Jira related questions

Jira Integration

This selection will determine where your items are created in Jira.

Primary Application: Planview Enterprise One Administration   

Planview will create Project and Sub-Project issue types based on your schedule. Epics will be nested under Sub-Projects and will originate from either Jira or Planview, depending on your selection below.

Epic Source: Epics will be created in Planview ▼

Please select "Pause Generation" of Jira artifacts until you have created your initial schedule. Once you have created your initial schedule, you will need to update this selection to "Generate Immediately" in order for the integration with Jira to initiate.

Please rename the lines in your schedule (the names in your schedule will become the names of your Jira items), remove lines you do not need (to avoid generating extra items in Jira), and ensure all lines have a name (unnamed lines will generate an error in the Jira integration).

When to generate Jira artifacts: Generate Immediately ▼

Jira Project Space

Epics can be created in Planview or in Jira

Gives the ability to pause the integration to make updates

Attributes are exposed in a column set, for visibility

The screenshot shows the Planview Enterprise One interface. The top navigation bar includes 'My Overview', 'Administration', 'Requests', 'Work', 'Resources', 'Timesheet', and 'Planning'. The current view is 'Work and Assignments' for the project 'Jira Integration Mapping'. Below the navigation, there are filters for 'Schedule', 'O'Reilly - 6. Project - Jira Integration', and 'Pre Initiate Project Approval'. The main table displays project details with columns for 'Line #', 'Name', 'Primary Application', 'Epic Source', and 'When to generate Jira artifacts'. A red box highlights the last three columns for all rows.

Line #	Name	Primary Application	Epic Source	When to generate Jira artifacts
1	Project: Jira Integration Mapping	Planview Enterprise One Administratic	Epics will be created in Planview	Generate Immediately
2	Jira Mapping Sub-Project	Planview Enterprise One Administratic	Epics will be created in Planview	Generate Immediately
3	- >>: Jira Mapping Epic 1	Planview Enterprise One Administratic	Epics will be created in Planview	Generate Immediately
4	Jira Mapping Sub-Project 2	Planview Enterprise One Administratic	Epics will be created in Planview	Generate Immediately
5	- >>: Jira Mapping Epic 2	Planview Enterprise One Administratic	Epics will be created in Planview	Generate Immediately

Using levels within the schedule allows flexibility

The screenshot shows the Planview Enterprise One interface. The top navigation bar includes 'My Overview', 'Administration', 'Requests', 'Work', 'Resources', 'Timesheet', 'Planning', and 'more ...'. The current view is 'Project O'Reilly Example Project' and 'View Work and Assignments'. Below the navigation, there are filters for 'Schedule', 'Copy of O'Reilly - 6. Project - Jira Integration', and 'No Baseline'. The main content is a table with 5 columns: Line #, Name, Primary Application, Epic Source, and When to generate Jira artifacts. The table shows a hierarchical structure with 12 lines, including sub-projects and epics.

Line #	Name	Primary Application	Epic Source	When to generate Jira artifacts
1	▲ Project: O'Reilly Example Project	Atlassian Administration	Epics will be	Generate Immediately
2	▲ >: O'Reilly Example Sub-Project A	Atlassian Administration	Epics will be	Generate Immediately
3	• >>: O'Reilly Epic 1	Atlassian Administration	Epics will be	Generate Immediately
4	• >>: O'Reilly Epic 2	Atlassian Administration	Epics will be	Generate Immediately
5	• >>: O'Reilly Epic 3	Atlassian Administration	Epics will be	Generate Immediately
6	▲ >: O'Reilly Example Sub-Project B	Atlassian Administration	Epics will be	Generate Immediately
7	• >>: O'Reilly Epic 4	Atlassian Administration	Epics will be	Generate Immediately
8	• >>: O'Reilly Epic 5	Atlassian Administration	Epics will be	Generate Immediately
9	• >>: O'Reilly Epic 6	Atlassian Administration	Epics will be	Generate Immediately
10	▲ >: O'Reilly Example Sub-Project C	Atlassian Administration	Epics will be	Generate Immediately
11	• >>: O'Reilly Epic 7	Atlassian Administration	Epics will be	Generate Immediately
12	• >>: O'Reilly Epic 8	Atlassian Administration	Epics will be	Generate Immediately

Project Mapping

Planview Enterprise One | My Overview Administration

Project O'Reilly Example Project

Schedule Copy of O'Reilly - 6. Project - Jira Integr

Line #	Name
1	Project: O'Reilly Example Project
2	>: O'Reilly Example Sub-Project A
3	>>: O'Reilly Epic 1
4	>>: O'Reilly Epic 2
5	>>: O'Reilly Epic 3
6	>: O'Reilly Example Sub-Project B
7	>>: O'Reilly Epic 4
8	>>: O'Reilly Epic 5
9	>>: O'Reilly Epic 6
10	>: O'Reilly Example Sub-Project C
11	>>: O'Reilly Epic 7
12	>>: O'Reilly Epic 8

JiraTest Dashboards Projects Issues Tempo Boards Tests Issue

Planview Demo / PLANVWDEMO-726

O'Reilly Example Project

Edit Comment Assign More Maintenance Project SDLC Project

Details

Type: Planview Project Status: Un
Priority: Unprioritized Resolution: Un
Labels: None
Planview Link: <https://oreillyauto-sb.pvcloud.com/planview/Shared/WorkDetail.asp?sc=11020>
Planview Work ID: 1000545
Planview Sequence ID: 11020
Planview Project: PV Demo Example Project
Description:

Description
Click to add description

Attachments
Drop files to attach, or browse.

Issue Links

Planview Sub-Projec...

- PLANVWDEMO-727 O'Reilly Example Sub-Project C
- PLANVWDEMO-728 O'Reilly Example Sub-Project B
- PLANVWDEMO-729 O'Reilly Example Sub-Project A

Sub-Project and Epic Mapping

Planview Enterprise One | My Overview | Administration

Project: O'Reilly Example Project

Schedule | Copy of O'Reilly - 6. Project - Jira Integr

Line #	Name
1	Project: O'Reilly Example Project
2	>>: O'Reilly Example Sub-Project A
3	>>>: O'Reilly Epic 1
4	>>>: O'Reilly Epic 2
5	>>>: O'Reilly Epic 3
6	>>: O'Reilly Example Sub-Project B
7	>>>: O'Reilly Epic 4
8	>>>: O'Reilly Epic 5
9	>>>: O'Reilly Epic 6
10	>>: O'Reilly Example Sub-Project C
11	>>>: O'Reilly Epic 7
12	>>>: O'Reilly Epic 8

JiraTest | Dashboards | Projects | Issues | Tempo | Boards | Tests | Issues

Planview Demo / PLANVWDEMO-729

O'Reilly Example Sub-Project A

Edit | Comment | Assign | More | Maintenance Project | SDLC Project

Details

Type: Planview Sub-Project | Status: Unprioritized

Priority: Unprioritized | Resolution: Unprioritized

Labels: None

Planview Link: <https://oreillyauto-sb.pvcloud.com/planview/Shared/WorkDetail.asp?sc=11021>

Planview Work ID: 1000545

Planview Sequence ID: 11021

Description

Click to add description

Attachments

Drop files to attach, or browse.

Issue Links

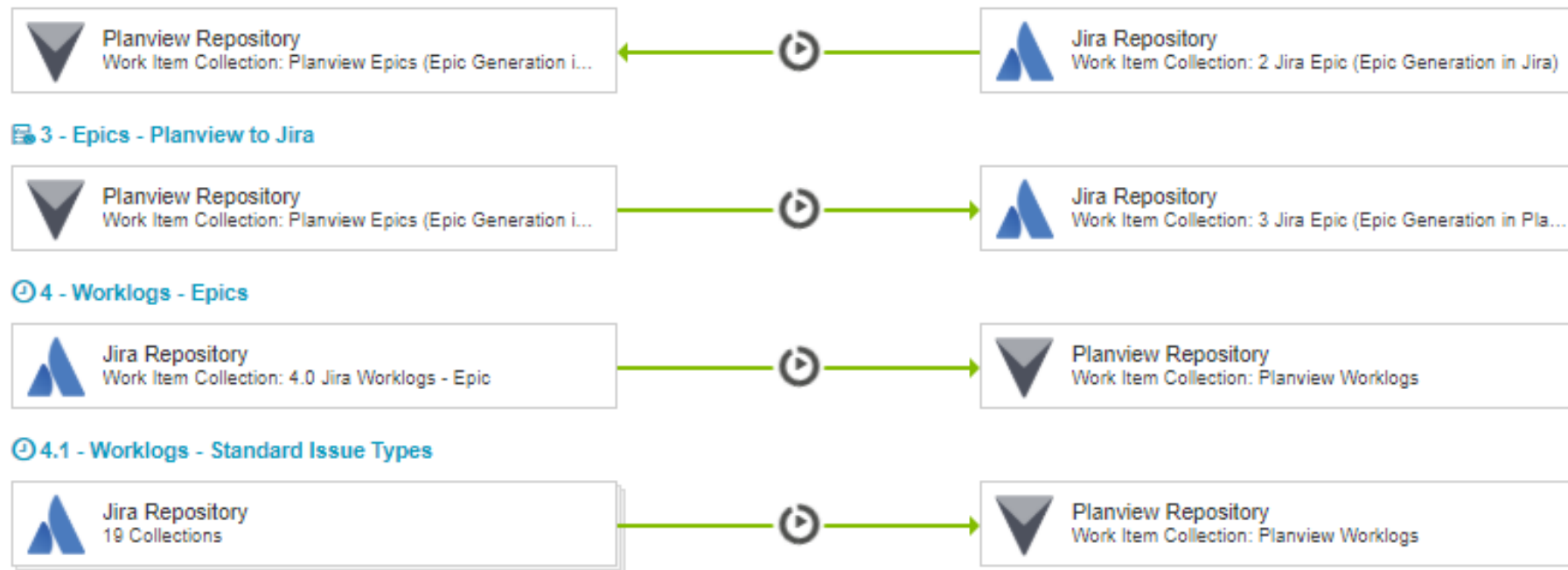
Planview Epic Childr...

- PLANVWDEMO-730 O'Reilly Epic 1
- PLANVWDEMO-731 O'Reilly Epic 2
- PLANVWDEMO-732 O'Reilly Epic 3

Planview Project Par...

- PLANVWDEMO-726 O'Reilly Example Project

Tasktop uses integration rules to translate between systems



Weekly processes keep things 'healthy'

We monitor for orphaned Jira work

We use a comparison report to review hours logged in Jira vs hours logged in Planview

Lessons learned

We learned to engage with Planview and Tasktop often and early when issues came up

Workshops were the most effective way for people to practice and prototype how they were going to set up their work

The tight link to financial reporting has helped drive compliance

The implementation created a shared understanding of processes and terminology among our teams

Our priorities for what's next

- 1) Portfolio analysis, reporting and insights
- 2) Improved resource management and capacity planning
- 3) Better management of individual projects

Questions?