

## Planforge: Standards-based Project Management for Jira

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## ACROSS INDUSTRIES

AUTOMOTIVE

FINANCIAL SERVICES

GOVERNMENT

HEALTHCARE &  
LIFE SCIENCES

HIGH TECH

MANUFACTURING

AEROSPACE

NONPROFIT &  
HIGHER EDUCATION

RETAIL

ENERGY & UTILITIES

TRAVEL & TRANSPORTATION

# 2

LOCATIONS  
AUSTRIA | GERMANY

MULTILINGUAL

AGILE & TRADITIONAL

FREE ENTRY-LEVEL  
EDITION

FOR UP TO 4  
PROJECT MANAGERS



19 YEARS OF  
PPM EXPERIENCE

AEROSPACE

NONPROFIT &  
HIGHER EDUCATION

RETAIL

ENERGY & UTILITIES

TRAVEL & TRANSPORTATION

300+ CUSTOMERS TRUST  
PLANFORGE

STANDARDS-BASED  
(IPMA®, PMI®, PRINCE2®, SCRUM, SAFE®)

FOUNDED  
2005

FREE  
VERSION

FOR UP TO 4 USERS

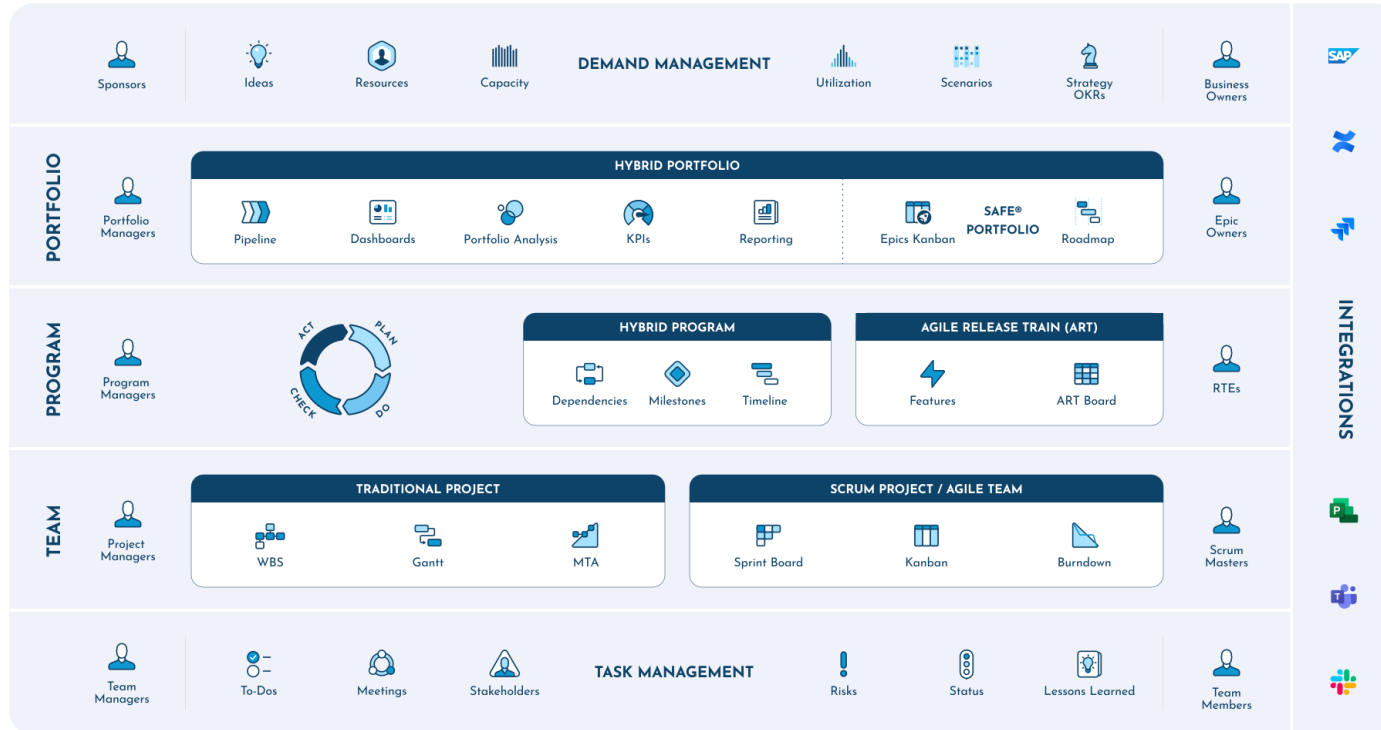
CLOUD &  
ON-PREMISES

## “Great Outcomes Start with Jira”

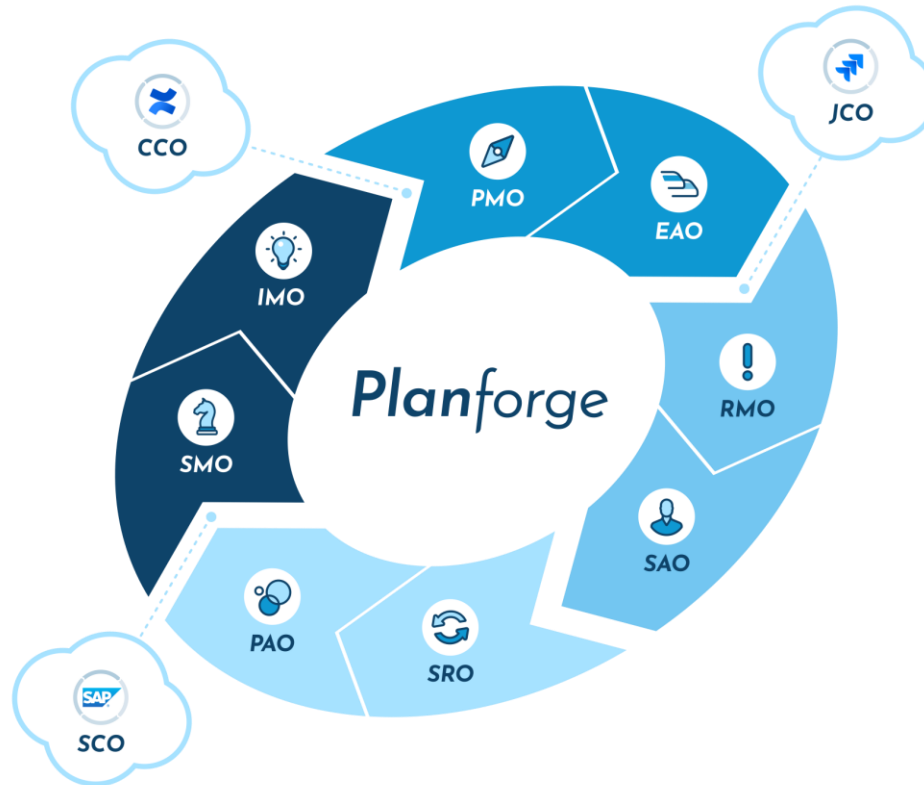
- ✓ Atlassian positions Jira lately as
  - “...the only project management tool you need...”
- ✓ Jira is great – **but** is this really *the whole truth*?
  - Especially if we talk about **standards-based** project management?
- ✓ Jira is a good foundation, but *not enough*
  - Planforge provides professional, standards-based PM on top of Jira

# Project Work Management Platform

 **PROJECT WORK MANAGEMENT**



# Optional Modules & Connectors



## Jira Connector Option (JCO)

- ✔ Extending Jira with a standards-based PPM layer (IPMA/PMI)
  - Without requiring for most Jira users to learn a new tool
- ✔ Empowering “real” program and portfolio management
  - Optionally with support for SAFe® Portfolios / ARTs / Agile Teams
- ✔ Supports bidirectional integration with multiple Jira instances
  - Including hybrid deployment (Jira Cloud & DataCenter)

## Jira Connectivity Use Cases

- ✔ Supports multiple Jira synchronisation use cases
- ✔ Bidirectional (two-way) synchronisation of traditional projects
- ✔ Bidirectional synchronisation of agile projects
- ✔ Bidirectional synchronisation of Agile Release Trains (ART)
  - Requires Enterprise Agile Option (EAO) for SAFe® support

## Synchronisation Scenarios

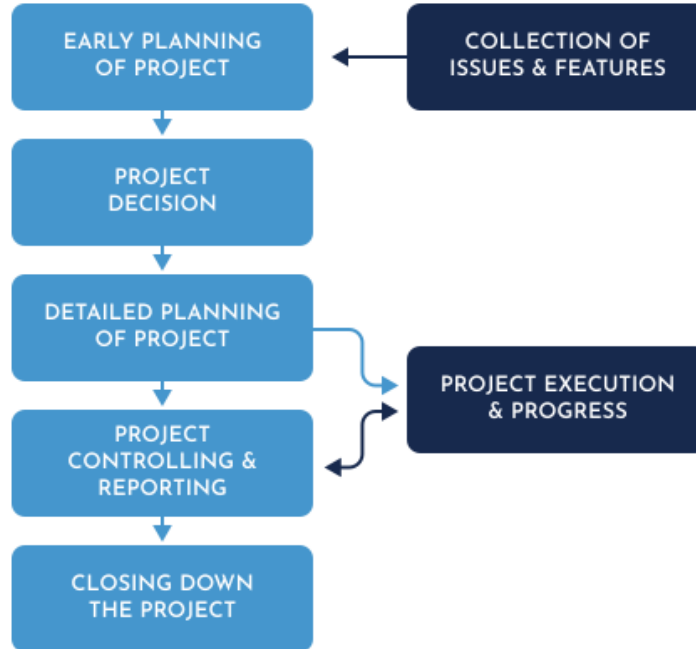
- ✔ One project in Planforge can be linked / synchronised with a...
  - Project in Jira
  - Fix Version in Jira within a Jira project
  - Component in Jira within a Jira project
  
- ✔ Current limitations and recommendations
  - No linking to or across multiple Jira projects
  - No Fix Version field should contain multiple versions
    - Otherwise syncing algorithm will choose the “first” one



## Bidirectional Synchronisation

- ✓ Planforge is generally the leading system for planning
  - Jira is typically the leading system for actual data (configurable)
    - With optional worklogs and remaining effort syncing from Jira
- ✓ Planning process depends on project methodology
  - Traditional and agile project plans are synced in different ways
- ✓ Attachments and comments are always synced in real-time
  - Newer data “wins” – regardless of source (no leading system)

# Jira Synchronisation & Project Life-Cycle



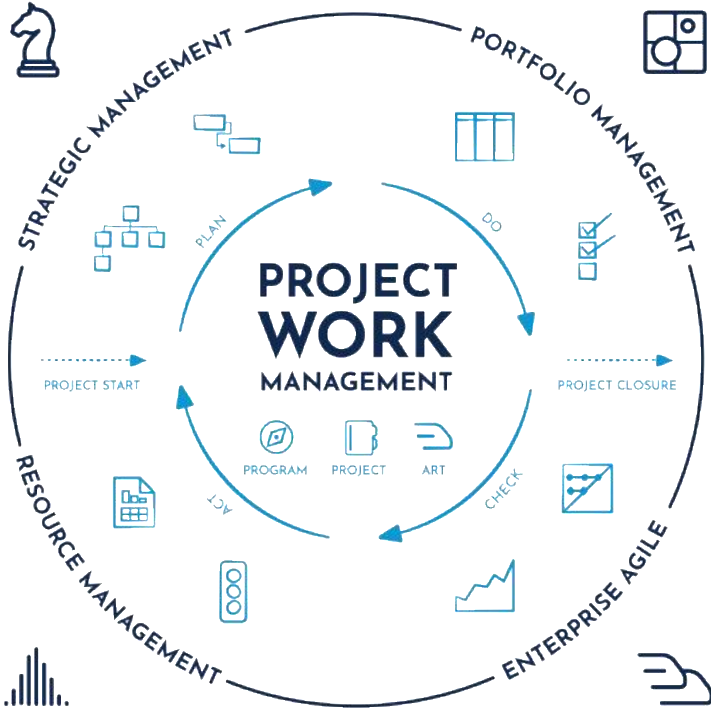
## High Flexibility & Configurability

- ✓ Flexible time tracking options
  - Tracking in Jira, Planforge, or even in both systems
- ✓ Configurable mapping per Jira instance for...
  - Issue types
  - Issue statuses
  - Priorities
  - Custom fields
  - Issue link types (dependencies / since Planforge 24.3)

# Standards-based Project Management

- ✓ IPMA-based project work management platform
  - All relevant planning and controlling tools: Gantt, WBS, MTA etc.
  - Readily available standards-based forms and processes
  - Configurable, standards-based reports
  
- ✓ Integrates with best of other standards
  - PMI-compatible KPIs (ETC, CTC, etc.)
  - PRINCE2 stage-gate concepts
  - SAFe®-compliant enterprise agile planning

# Complete Project Life Cycle



# Project Charter Form & Report



MY WORK

PORTFOLIOS

TEAMS

CUSTOMERS

REPORTS

Administrator - Mario Tomic



PORTFOLIOS

PPM Tool

Overview

Properties

Planning

Controlling

Status

To-Dos

Meetings

Documents

Discussions

Stream

Project Charter

Context

Evaluation

Advanced

Changes

Closure

History

Permissions



Save as Template

Download Report

- All Portfolios
- 01 - Demo Portfolio
  - Customer Projects
    - CP1
    - CP2
  - Internal Projects
    - Database Project
    - PM Handbook
    - PPM Tool
    - Software Project
    - Website USA
  - Templates
  - 02 - Your Portfolio
  - Deleted Projects

## General

Name	PPM Tool	Project Number	
Project Type	Organization Project	Template	(Not selected)
Methodology	Traditional	Jira Project Link	
Description	Qualification and deployment of a project and portfolio management tool		
Pipeline Stage	DECISION	General Status	Red

## Dates

Start Date	13.05.24	End Date	20.12.24
Start Event		End Event	

## Objectives

Objective	Pri.	Com.
A single tool for single and multi-project management	🔴	<input type="checkbox"/>
High acceptance by employees	🔴	<input type="checkbox"/>
Minimum of 90% compliance to functional requirements	🟡	<input type="checkbox"/>



## Non-Objectives

Integrated Document Management



# Integrated Gantt & WBS Charts



MY WORK **PORTFOLIOS** TEAMS CUSTOMERS REPORTS Administrator - Mario Tomio

PPM Tool

Overview Properties **Planning** Controlling Status To-Dos Meetings Documents Discussions Stream

Work Breakdown (WBS) Activity List Schedule Utilization Costs Risks Stakeholders RACI Timeline Milestones

Edit Check-in Revert Save

Outline Levels: 2 View Type: Effort Status: All

PPM Tool

E (h):	833,00
C:	€ 80.700,00
P:	€ 0,00

Project Management	Requirements	Vendors Pre-Selection	Vendor selection and order
E (h): 160,00 C: € 8.000,00 P: € 0,00	E (h): 120,00 C: € 6.000,00 P: € 0,00	E (h): 96,00 C: € 5.100,00 P: € 0,00	E (h): 170,00 C: € 38.900,00 P: € 0,00
1	2	3	4

Project Planning	Collect Requirements	Identify suitable vendors (Gartner PPM)	Proofs of concept
E (h): 20,00 C: € 1.000,00 P: € 0,00	E (h): 40,00 C: € 2.000,00 P: € 0,00	E (h): 8,00 C: € 400,00 P: € 0,00	E (h): 150,00 C: € 7.500,00 P: € 0,00
1.1	2.1	3.1	4.1

Project Controlling	Create Requirements List	Send RFI	Get final offers
E (h): 120,00 C: € 6.000,00 P: € 0,00	E (h): 80,00 C: € 4.000,00 P: € 0,00	E (h): 8,00 C: € 400,00 P: € 0,00	E (h): 8,00 C: € 400,00 P: € 0,00
1.2	2.2	3.2	4.2

Project Closing	Requirements List Done	Evaluate feedbacks	Negotiations

Category 1 Category 2 Category 3 Category 4 Category 5 Category 6 Category 7



MY WORK **PORTFOLIOS** TEAMS CUSTOMERS REPORTS Administrator - Mario Tomio

PPM Tool

Overview Properties **Planning** Controlling Status To-Dos Meetings Documents Discussions Stream

Work Breakdown (WBS) Activity List **Schedule** Utilization Costs Risks Stakeholders RACI Timeline Milestones

Edit Check-in Revert Save

View Type: Effort

7 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 1 2 3 4

Q3/2024 Q4/2024 Q1/2025

1 Project Management

2 Requirements

2.1 Collect Requirements ChangW 40h

2.2 Create Requirements List CristinaM 80h

2.3 Requirements List Done CristinaM

3 Vendors Pre-Selection

3.1 Identify suitable vendors (Gartner PPM) MichaelS 8h

3.2 Send RFI MichaelS 8h

3.3 Evaluate feedbacks MichaelS 40h

3.4 Perform vendors demos ChangW 6h; CristinaM 6h; GeraldS 6h; MelindaW 6h; MichaelS 8h

3.5 Create vendors short-list CristinaM 5h; MichaelS 5h

3.6 Vendor short-list validated MichaelS

4 Vendor selection and order

4.1 Proofs of concept

4.1.1 Tests vendor 1 ChangW 16,67h; CristinaM 16,67h; MelindaW 16,67h

4.1.2 Tests vendor 2 ChangW 16,67h; CristinaM 16,67h; MelindaW 16,67h

4.1.3 Tests vendor 3 ChangW 16,67h; CristinaM 16,67h; MelindaW 16,67h

4.2 Get final offers MichaelS 8h

4.3 Negotiations GeraldS 8h

4.4 Vendor selected CristinaM

4.5 Place order CristinaM 4h

4.6 PPM tool ordered CristinaM

5 Software delivery and installation

5.1 Installation package delivered MelindaW

5.2 Software installation MelindaW 4h

5.3 Software installed MelindaW

6 implementation and trainings

6.1 Planforge training 1 (admin and PMO) CristinaM 8h; MelindaW 8h; MichaelS 8h

Category 1 Category 2 Category 3 Category 4 Category 5 Category 6 Category 7

# Change Request Form & Report

The screenshot displays the Planforge PPM Tool interface. The main navigation bar includes 'MY WORK', 'PORTFOLIOS', 'TEAMS', 'CUSTOMERS', and 'REPORTS'. The user is logged in as 'Administrator - Mario Tomic'. The left sidebar shows a tree view of portfolios, with 'PPM Tool' selected. The main content area has tabs for 'Overview', 'Properties', 'Planning', 'Controlling', 'Status', 'To-Dos', 'Meetings', 'Documents', 'Discussions', and 'Stream'. The 'Changes' tab is active, showing options for 'Project Charter', 'Context', 'Evaluation', 'Advanced', 'Changes', 'Closure', 'History', and 'Permissions'. A modal window titled 'Edit Change Request' is open, showing the following form fields:

Field	Value
Title	Change Request Example
Number	1
Created by	CristinaM
Created On	20.11.24
Responsible	CristinaM
Priority	Medium
Status	Draft
Reason	Detailed Description of the Change - What changes are necessary? - Which systems/user groups/projects/work packages are affected? - What is the timeline for the described changes?
Description	A Change Request represents a request for modification to a product, project, or part of it. Within the request, it should be precisely documented what the change request pertains to and the reasoning behind it. Associated costs, time, and workload estimates must be specified. For each change request, there should be controllable criteria to assess its feasibility, necessity, and meaningfulness.

At the bottom of the modal, there are buttons for 'Change Request', 'Cancel', 'Save', and 'Submit'.



# Status Report Form & Report



MY WORK

PORTFOLIOS

TEAMS

CUSTOMERS

REPORTS

Administrator - Mario Tomic



PORTFOLIOS

PPM Tool

Overview

Properties

Planning

Controlling

Status

To-Dos

Meetings

Documents

Discussions

Stream

- All Portfolios
  - 01 - Demo Portfolio
    - Customer Projects
      - CP1
      - CP2
    - Internal Projects
      - Database Project
      - PM Handbook
      - PPM Tool
        - Software Project
        - Website USA
    - Templates
    - 02 - Your Portfolio
    - Deleted Projects

Save | Project Status

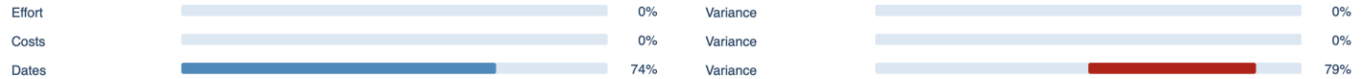
Done

## Overview

Period	2024
Status	Red
Dates	Red
Resources	Green
Costs	Green
Quality	Yellow

November
The project is facing delays due to resource constraints.
Team Size: 10 Members
Costs are within budget with minimal variance.
Testing phase ongoing; minor issues identified.

## Progress



## Rating

General and Progress	The project is progressing steadily, with minor delays in testing.
Problems and Necessary Decisions	Decision pending on additional QA resources.
Forecast and Next Steps	Expected completion by June 2025. Focus on addressing QA issues.

# Timeline for Communication



PORTFOLIOS

PPM Tool

- Overview
- Properties
- Planning**
- Controlling
- Status
- To-Dos
- Meetings
- Documents
- Discussions
- Stream

- Work Breakdown (WBS)
- Activity List
- Schedule
- Utilization
- Costs
- Risks
- Stakeholders
- RACI
- Timeline**
- Milestones

- Edit
- Check-in
- Revert
- Save
- Info
- Print

Time Unit:

6.10 Implementation completed  
23.12.24

Q4/2024

Q1/2025



Requirements List Done

4.4 Vendor selected  
22.10.24

5.1 Installation package delivered  
29.10.24

- Category 1
- Category 2
- Category 3
- Category 4
- Category 5
- Category 6
- Category 7

# Project Closure Form & Report



## PORTFOLIOS

- ▼ All Portfolios
  - ▼ 01 - Demo Portfolio
    - Customer Projects
      - CP1
      - CP2
    - Internal Projects
      - Database Project
      - PM Handbook
      - PPM Tool**
      - Software Project
      - Website USA
    - Templates
      - 02 - Your Portfolio
      - Deleted Projects

## PPM Tool

- Overview Properties Planning Controlling Status To-Dos Meetings Documents Discussions Stream

- Project Charter Context Evaluation Advanced Changes **Closure** History Permissions

- 

### Overall Impression

Total Rating ★ ★ ★ - -

Comment  
Objectives met successfully, but significant delays highlight the need for better planning and resource involvement in future projects.

Complete Completed

### Objectives

Objective	Pri.	Com.	Rating	Comment
A single tool for single and multi-project management	🔴🔴🔴	<input type="checkbox"/>		
High acceptance by employees	🔴🔴🔴	<input type="checkbox"/>		
Minimum of 90% compliance to functional requirements	🟡🔴🔴	<input type="checkbox"/>		

### Reflection

	Plan	Actual	Var.	Var. (%)	Comment
End Date	04.12.24	17.06.25	139d	98%	
Effort	833h	0h	-833h	-100%	
Costs	€ 80.700,00	€ 0,00	-€ 80.700,00	-100%	

### Lessons Learned

# Configurable KPIs


## PORTFOLIOS


All Portfolios


- Overview
- Properties
- Project List
- Status
- Progress
- Dates
- Resources
- Costs
- Risks
- Pipeline
- Analyze
- Ideas
- KPIs
- Strategy


🔄 Reset × Done


- All Portfolios
  - 01 - Demo Portfolio
    - Customer Projects
      - CP1
      - CP2
    - Internal Projects
      - Database Project
      - PM Handbook
      - PPM Tool
      - Software Project
      - Website USA
    - Templates
      - 02 - Your Portfolio
      - Deleted Projects


  
**€ 697.230**  
Planned Costs


  
**372d**  
Planned Effort

  
**94d**  
Ø Project Duration


  
**1,75**  
Ø Projects per PM


  
**74,28 %**  
Ø Time Variance


  
**7,73 %**  
Ø Effort Variance


  
**7,65 %**  
Ø Cost Variance


  
**1,08**  
SPI







  
**1,65**  
CPI

  
**% Project Status**  
■ 29 %  
■ 0 %  
■ 71 %

  
**7 months**  
Last Project Created

  
Last Status Report

  
**331d**  
Remaining Effort (ETC)

-   
Actual Costs
-   
Actual Effort
-   
% Effort Progress
-   
% Active Projects
-   
Ø Profit
-   
Remaining Costs (CTC)

# Project & Portfolio Dashboards

- All Portfolios
- 01 - Demo Portfolio
  - Customer Projects
    - CP1
      - CP2
  - Internal Projects
    - Database Project
    - PM Handbook
    - PPM Tool
    - Software Project
    - Website USA
  - Templates
    - 02 - Your Portfolio
    - Deleted Projects

## Project Cockpit



## Progress

48%

## Effort



## Work Package Status



## Properties

PROJECT MANAGER  
MelindaW  
CUSTOMER  
APPLE  
PIPELINE STAGE  
EXECUTION  
START DATE  
05.02.24  
SPI  
0,48

## To-Dos

- | Title                           |
|---------------------------------|
| <input type="radio"/> Measure 1 |
| <input type="radio"/> Measure 3 |
| <input type="radio"/> Measure 2 |
| <input type="radio"/> Measure 2 |
| <input type="radio"/> Measure 2 |
| <input type="radio"/> Measure 1 |

## Open Milestones

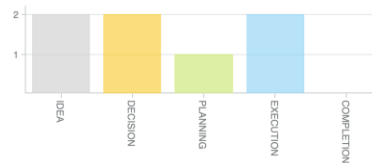
WBS	Milestone
2.3	Milestone 1
3.3	Milestone 2
1.5	Project completed

## Milestone Trend Analysis



- All Portfolios
  - 01 - Demo Portfolio
    - Customer Projects
      - CP1
        - CP2
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## Pipeline



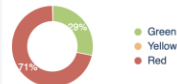
## Total Effort

2.975h

## Total Costs

€ 697.230,00

## % Project Status



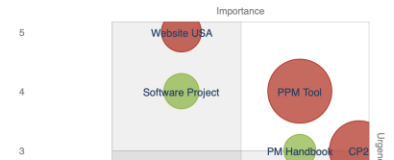
## KPIs

ACTIVE PROJECTS	7	% ACTIVE PROJECTS	100%
PROJECT DURATION	94,43d	PROJECTS PER PM	1,75
TIME VARIANCE	74%	COST VARIANCE	8%
EFFORT VARIANCE	8%	SPI / VELOCITY	1,08
CPI	1,65		

## Top Projects

Project	Stage	Status	% Com.
CP1	EXECUTION	<span style="color: green;">●</span> <span style="color: yellow;">●</span> <span style="color: red;">●</span>	48%
CP2	PLANNING	<span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: green;">●</span>	0%
PPM Tool	DECISION	<span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: green;">●</span>	0%
Database Project	DECISION	<span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: green;">●</span>	0%
Website USA	EXECUTION	<span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: green;">●</span>	33%
Software Project	IDEA	<span style="color: green;">●</span> <span style="color: yellow;">●</span> <span style="color: red;">●</span>	0%
PM Handbook	IDEA	<span style="color: green;">●</span> <span style="color: yellow;">●</span> <span style="color: red;">●</span>	0%

## Eisenhower Matrix

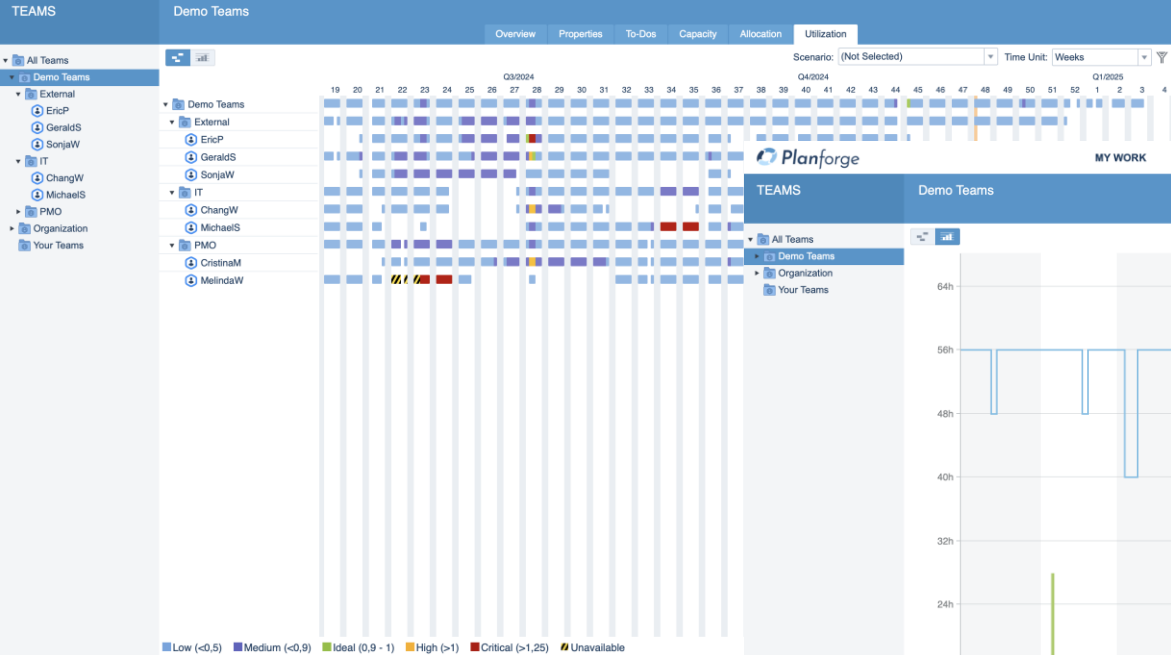


# Integrated Resource Management



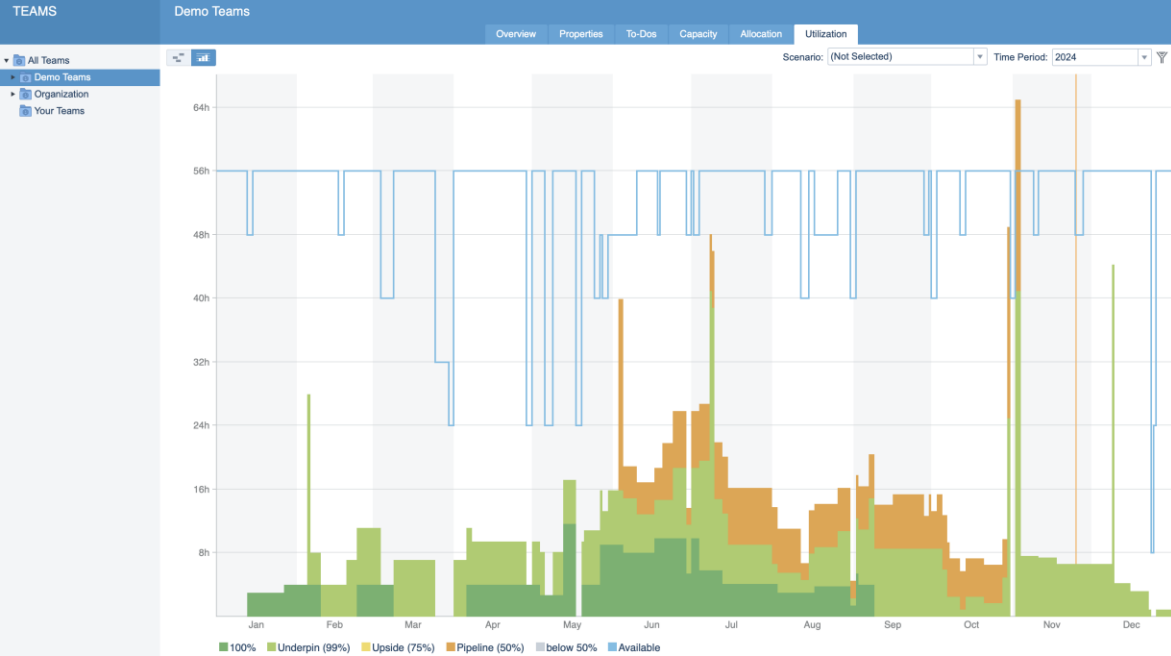
MY WORK PORTFOLIOS **TEAMS** CUSTOMERS REPORTS

Administrator - Mario Tomic



MY WORK PORTFOLIOS **TEAMS** CUSTOMERS REPORTS

Administrator - Mario Tomic



## Recent Improvements (Release 24.3)

- ✔ Synchronising of one Planforge field to multiple Jira fields
  - Limitation: only one Jira field is synced bidirectionally (two-way)
- ✔ Synchronisation of dependencies to Jira issue links
  - Configurable Planforge dependency type to Jira link type mapping
- ✔ Support for Jira Advanced Roadmaps
  - By configuring the above features based on your Roadmaps setup

## Future Roadmap

- ✓ Optional filtering of Jira issue “pipeline”
  - More granular control of which issues are synced to Planforge
- ✓ Synchronisation across multiple Jira projects
  - Small number of Jira projects – must be actively chosen
  - *Currently a “research” project*
- ✓ Integration with Idea Management
  - Gathering ideas via Jira ServiceDesk / Service Management





MODERN, WEB-BASED  
APPLICATION ARCHITECTURE



HYBRID PPM - SIMPLE, TRADITIONAL  
& AGILE PROJECTS



FAST ACCESS TO INFORMATION  
ANYTIME AND ANYWHERE



OPTIONAL INTEGRATIONS WITH  
CONFLUENCE®, JIRA®, SLACK® & SAP®



# Planforge



REAL-TIME PROJECT  
& PORTFOLIO DASHBOARDS



HIGHLY CONFIGURABLE -  
TAILORED TO YOUR NEEDS



INTUITIVE TO LEARN  
& EASY TO USE



ALL INFORMATION IN ONE CENTRAL,  
INTEGRATED SOLUTION