Using the Master WBS

Definitions

Portfolio: Within Planview, a Portfolio refers to a user-defined set of projects and programs to be viewed in a single view. Users create portfolios according to their viewing needs. Portfolios in Planview need not correspond to strategic portfolios as defined at VUMC.

WBS: The Work Breakdown Structure (WBS) is a hierarchical structure in which work items or project elements are broken down into smaller work packages, with larger activities often dependent on the completion of the smaller activities that make them up. Each descending level represents an increasingly detailed definition of the project objective. In Planview, each project entered as Work has a unique WBS, which must be built and updated in order to generate project status reports.

Master WBS: When you have a Work Portfolio open, you can use the Master WBS tile to generate a long “master” list of all WBS tasks for every project within the given Work Portfolio, combined into a single view.

Icons in this job aid

Information

Steps

Open a Work Portfolio

1. Log into Planview: [https://vumc.pvcloud.com/planview/](https://vumc.pvcloud.com/planview/).
2. Click Work to open the Work menu.
3. Show Work Portfolios, select the work portfolio you want to open, then choose Portfolio View as your action.

For additional support, please visit the EPMO website.
Using the Master WBS

If you do not already have the desired Work Portfolio created, please follow the steps in the Creating Work Portfolios job aid before proceeding.

Add the Master WBS Tile to the Work Ribbon

1. Once you have opened the Work Portfolio view, you will see the open Work menu, with any tiles you have set up in the Work ribbon. The tile on the far left will be the default view. (In the example below, Portfolio Manager is the default tile.)

2. Click more… and Manage Tiles to add the Master WBS tile to your ribbon.

3. Once the tile has been added, click the Master WBS tile.

For more detailed instructions, follow the Managing Tiles in the Ribbon job aid.

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Using the Master WBS

Reading the Master WBS

1. The following information is available within the Master WBS tile view: Program Name, Project/Phase/Activity/Task, Work Status, Milestone Status, and Scheduled Start and Finish Dates.

2. Note that the Project/Phase/Activity/Task column uses indentation to indicate the level of organization within the WBS. You may export the report into Excel, but sorting the columns into a different order after exporting may result in loss of clarity within this column (i.e., you may lose accuracy about which phase a task belongs to.)

3. If any information is missing, open the individual project from the Work menu to update its WBS. When you update the project’s individual WBS and re-run the Master WBS, the information will be updated in the Master WBS.

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