Creating Work Portfolios

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.

Icons in this job aid

Steps

Open the Work Menu

1. Log into Planview: [https://vumc.pvcloud.com/planview/](https://vumc.pvcloud.com/planview/).
2. Click **Work** to open the Work menu.
3. In the Work menu, click **+ New Work** in the Show menu.

![Work Menu Diagram](image)

For additional support, please visit the [EPMO website](#).
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Define Portfolio

1. Click the **data picker** icon next to the **Work** field on the portfolio definition screen.

2. The work picker window opens. Use one of the following options to find the work you want to include in this portfolio:
   a. Click the **Hierarchy** tab to browse the organization hierarchy for work to select. Use the checkboxes to select all work to include in the portfolio.
   b. Click the **Search** tab to find work by keyword search or work ID search.
c. Click the **Bookmarks** tab to add previously bookmarked work to your portfolio.

![Bookmarks tab](image)

3. After clicking **OK**, the work selected using the methods above appears in the **Work** field.

![Work field](image)

4. Enter a portfolio name in the **Name** field.

![Name field](image)
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5. Enter a description in the **Description** field.

   ![Work Portfolio Interface]

   **Note:** It’s a good idea to add a description that reminds you of why you created this portfolio, e.g., “Portfolio created for monthly status reports with manager.”

**Advanced Options**

1. If you want to filter the Work in your portfolio by work attribute criteria, click the attribute in the list of optional attribute categories under Advanced Options. For example, to see only work with an Anticipated Duration longer than 90 days, click **Anticipated Duration**.

   ![Advanced Options]

2. The data picker window opens, allowing you to select the filtering criteria. Select the option you want to filter (in this example, “90 days or longer”) then click **OK**.

   ![Data Picker]

3. Repeat to filter your portfolio definition on as many attribute criteria as needed.

4. If you want to filter the Work in your portfolio by users assigned to certain work lifecycle roles, click the role in the second list under Advanced Options. For example, to see only work with a specific project manager, click **Responsible Project Mgr**.

   ![Role Selection]

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5. Find the users you want to include in your portfolio by searching or browsing. Click the checkbox(es), then click OK.

6. The work attribute and lifecycle role criteria you selected will appear in the boxes on the right under Advanced Options. Check that they are accurate for your portfolio definition. Click Save to proceed.

Access Your Work Portfolio

1. Click Work to open the Work menu.
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2. To view your portfolio, click Work Portfolios under the Show menu, then click the portfolio you need in the Select menu. Click **Portfolio View** to open the portfolio.

![Diagram of Work Menu]

3. To update the portfolio, click **Portfolio Definition**. You will be taken to the screen that will allow you to update the portfolio by following the steps on pages 2-4 above.

![Diagram of Work Menu]

**Sharing Portfolios with Other Planview Users**

1. To share this portfolio with another Planview user, click **Portfolio Members**.

![Diagram of Work Menu]

4. Click **Invite new members**.

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a. Use the data picker to Select Users to Invite.

b. Users selected in the data picker appear in the empty box. Add a Message to Invitee(s) to explain why they are being invited to access your portfolio. Click Invite to send the email notifications. Then click Done.