



ChangePoint-ProjectPlace Connector Addendum

Planview ChangePoint 2022 R2

© 2022 Planview, Inc. All rights reserved.

U.S. GOVERNMENT RIGHTS-Use, duplication, or disclosure by the U.S. Government is subject to restrictions as set forth in Changepoint Canada ULC license agreement and as provided in DFARS 227.7202-1(a) and 227.7202-3(a) (1995), DFARS 252.227-7013(c)(1)(ii) (OCT 1988), FAR 12.212(a) (1995), FAR 52.227-19, or FAR 52.227-14 (ALT III), as applicable.

This product contains confidential information and trade secrets of Changepoint Canada ULC. Disclosure is prohibited without the prior express written permission of Changepoint Canada ULC. Use of this product is subject to the terms and conditions of the user's License Agreement with Changepoint Canada ULC.

Documentation may only be reproduced by Licensee for internal use. The content of this document may not be altered, modified or changed without the express written consent of Changepoint Canada ULC. Changepoint Canada ULC may change the content specified herein at any time, with or without notice.

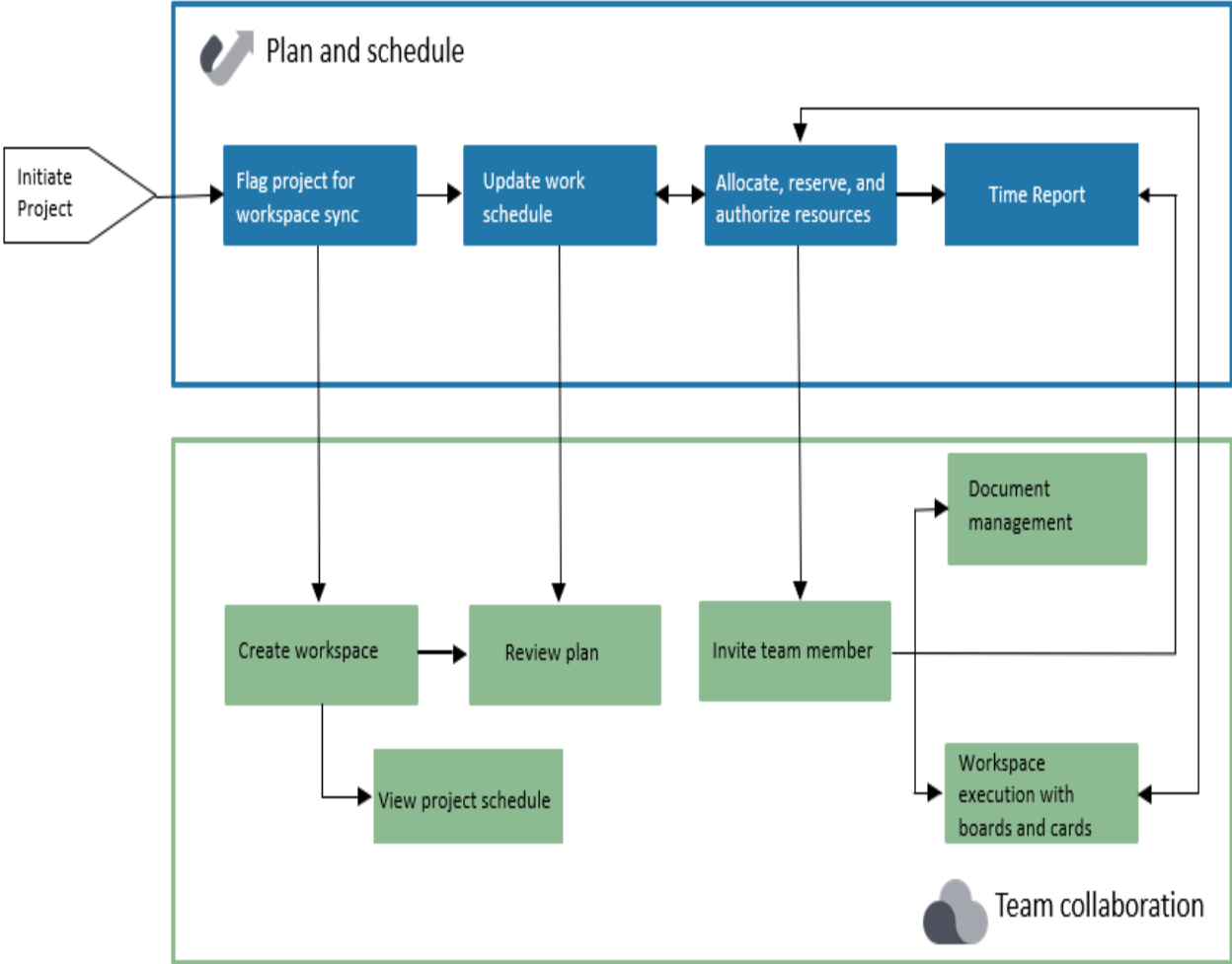
Introduction

The Planview ChangePoint-ProjectPlace Connector synchronizes information between ChangePoint and ProjectPlace. The connector creates a collaborative work environment that supports both structured and unstructured work, and cross-organization collaboration.

Highlights of the connector include:

- event-based connection between ChangePoint and ProjectPlace
- streamlined work creation by connecting ChangePoint projects with ProjectPlace workspaces

Note: The minimum requirement for the ChangePoint-ProjectPlace Connector is ChangePoint 2022 R2.



Connecting ChangePoint with ProjectPlace

Using the ChangePoint-ProjectPlace Connector, organizations can govern service delivery projects while giving team members a single, collaborative experience for getting work done by combining service delivery management and collaborative work.

Service delivery work is controlled at the project level. It is proposed, scoped, planned, and managed in ChangePoint, where project managers can optimize delivery, balance capacity against demand, and link plans and resources to project execution.

Team members use ProjectPlace for their collaborative work, from tracking individual to-do items and participating in cross-functional work collaboration, to contributing to the service delivery work.

When ChangePoint is connected with ProjectPlace, the service delivery work starts in a ChangePoint project. The project information is sent to ProjectPlace, where a corresponding workspace is created.

After this point, scheduling and planning occur in ChangePoint, while team collaboration and the delivery of work occur in ProjectPlace. The status of key items flows back from ProjectPlace to ChangePoint for project statusing, reporting, and management.

Getting started

Validating and testing the connector

After Customer Care confirms that the ChangePoint-ProjectPlace Connector has been successfully installed, you can validate and test the connector.

1. In ChangePoint Administration, enable the connector:
 - a. Click **General > Server Integration** .
 - b. Select the **Enable ChangePoint updates to Projectplace** check box.
2. In ChangePoint, access a project for editing and ensure that the **Send updates to Projectplace** field appears.
3. Create a test project in ChangePoint and enable the **Send updates to Projectplace** option on the project.

After five minutes, the **Projectplace workspace link** field should appear in the expanded **General** card on the project profile.

4. Do one of the following:
 - If the field appears, delete the test project, which removes the link to ProjectPlace. You can then delete the test workspace in ProjectPlace.
 - If the field does not appear, the synchronization was not successful. Please submit a Customer Care ticket.

Start using the ChangePoint-ProjectPlace Connector

Stage 1. Create a new project

1. In ChangePoint, create a new project.
2. In Project Worksheet:
 - a. Add tasks with relevant dates and details to the project.
 - b. Assign the tasks to resources.
 - c. Add the four new ProjectPlace task fields to the task view so you will be able to view the updates from Projectplace:
 - Projectplace task complete
 - Projectplace task completion date
 - Projectplace task ID
 - Projectplace task link

Stage 2. Sync the ChangePoint project with ProjectPlace

1. In ChangePoint, enable the **Send updates to Projectplace** option on the project.
2. After a few minutes, refresh the project profile. The **Projectplace workspace link** field should appear in the expanded **General** card.
3. Click the workspace link to access the connected ProjectPlace workspace, which includes activities that correspond to the project tasks.

Stage 3. Add boards and cards to the ProjectPlace workspace

In the ProjectPlace workspace, you can create cards directly on the activities in the **Plan** tab, or navigate to the **Boards** tab and create cards directly on the boards.

Note: The boards and cards are not part of the connector, and only the activities on the plan are updated by the connector.

Stage 4. Staff the ChangePoint project

When resources are assigned to a task on a ChangePoint project that is connected with a ProjectPlace workspace, an email is sent by the connector to advise them to either create a ProjectPlace account or to sign into the connected workspace.

Note: You must ensure that the resources assigned to the project in ChangePoint have associated user accounts with valid email addresses.

Stage 5. Monitor and update the project schedule in ChangePoint

When the project is updated or tasks are created or edited in ChangePoint, the workspace and activities are updated in ProjectPlace accordingly.

When team members mark an activity or milestone as **Done** in ProjectPlace, the **Task complete** check box is enabled and the date appears in the **Task completion date** field in ChangePoint.

The project manager then updates the project schedule in ChangePoint by marking the task as complete.

About connected projects and workspaces

How do users create connected workspaces in ProjectPlace?

To create a connected workspace in ProjectPlace from ChangePoint:

1. Access the project for editing. The project must be in **Active** status.
2. In the **General** tab, select the **Send updates to Projectplace** check box.
3. Save the project.

How do users disconnect a project from a workspace?

1. In ChangePoint, access the project for editing.
2. In the **General** tab, clear the **Send updates to Projectplace** check box.
3. Save the project.
4. The link to the workspace is removed. You can then terminate the workspace, if required.

Which application controls the schedule for connected tasks and activities?

The project in ChangePoint is the system of record for the project schedule, which means that the data in ChangePoint controls the data in ProjectPlace. For connected tasks, the connector automatically transfers work schedules created and updated in ChangePoint to the connected workspace plan in ProjectPlace.

Adding and deleting tasks

All tasks added to the work breakdown structure for a ChangePoint project are automatically synced to the connected ProjectPlace workspace plan.

Note: ProjectPlace does not allow parent activities or milestones to have cards or boards for ChangePoint tasks that have associated ProjectPlace cards.

If you create a child task or subtask, or change a task to a milestone in ChangePoint, the following occurs in ProjectPlace:

- the corresponding activity is created or changed to a milestone
- cards associated to the activity are removed from the activity:
 - cards that are connected to a board are moved to the **No Activity** lane
 - cards not connected to a board are moved to the **Orphaned cards** board

When you delete a task from a ChangePoint work breakdown structure, the following occurs in ProjectPlace:

- the corresponding activity is deleted in the connected workspace plan
- cards associated to the activity are removed from the activity:
 - cards that are connected to a board are moved to the **No Activity** lane
 - cards not connected to a board are moved to the **Orphaned cards** board

Inviting resources to ProjectPlace

When a resource is assigned to a task on a ChangePoint project, they are sent an email notification to either create a ProjectPlace account or to log in to the connected workspace.

Note: Resources in ChangePoint require valid email addresses.

About time reporting

When the ChangePoint time sheet is enabled for a ProjectPlace account, it becomes the default time sheet for users and the native ProjectPlace time sheet is no longer supported.

When users select **Time Reporting** from the **Tool Selector** in ProjectPlace, the ChangePoint time sheet appears.

All of the necessary business rules required by the delivery management processes are enforced and all time sheet data is saved in ChangePoint. The ChangePoint time sheet does not integrate information between ProjectPlace and ChangePoint.

Note: To enable the ChangePoint time sheet in your environment, please submit a customer care ticket.

Caveats and known issues

The following are caveats and known issues for this version of the ChangePoint-ProjectPlace Connector.

1. When a project or task is deleted in ChangePoint, a Delete message is not sent, which can result in orphaned records in ProjectPlace. Therefore, be sure to examine the task structures and assignments before sending the project to ProjectPlace.
2. Task planned start and finish dates in ChangePoint might not match Activity start and end dates in ProjectPlace for summary tasks. This can occur when the summary task has assignments, and the assignment planned start and finish dates are outside of the planned start and finish date of its subtasks in ChangePoint.
3. Actions such as “rollup project” and “transfer project to me” do not send updates for project and task to ProjectPlace.
4. Project plan editors configured on the billing office are not in the project assignment list when publishing the assignment list in ChangePoint, therefore these project plan editors will not be in the member list in ProjectPlace.
5. Adding or removing project plan editors and removing task assignments do not send updates to ProjectPlace. The members in ProjectPlace remains the same.
6. Reopening a completed task does not send an update to ProjectPlace.

