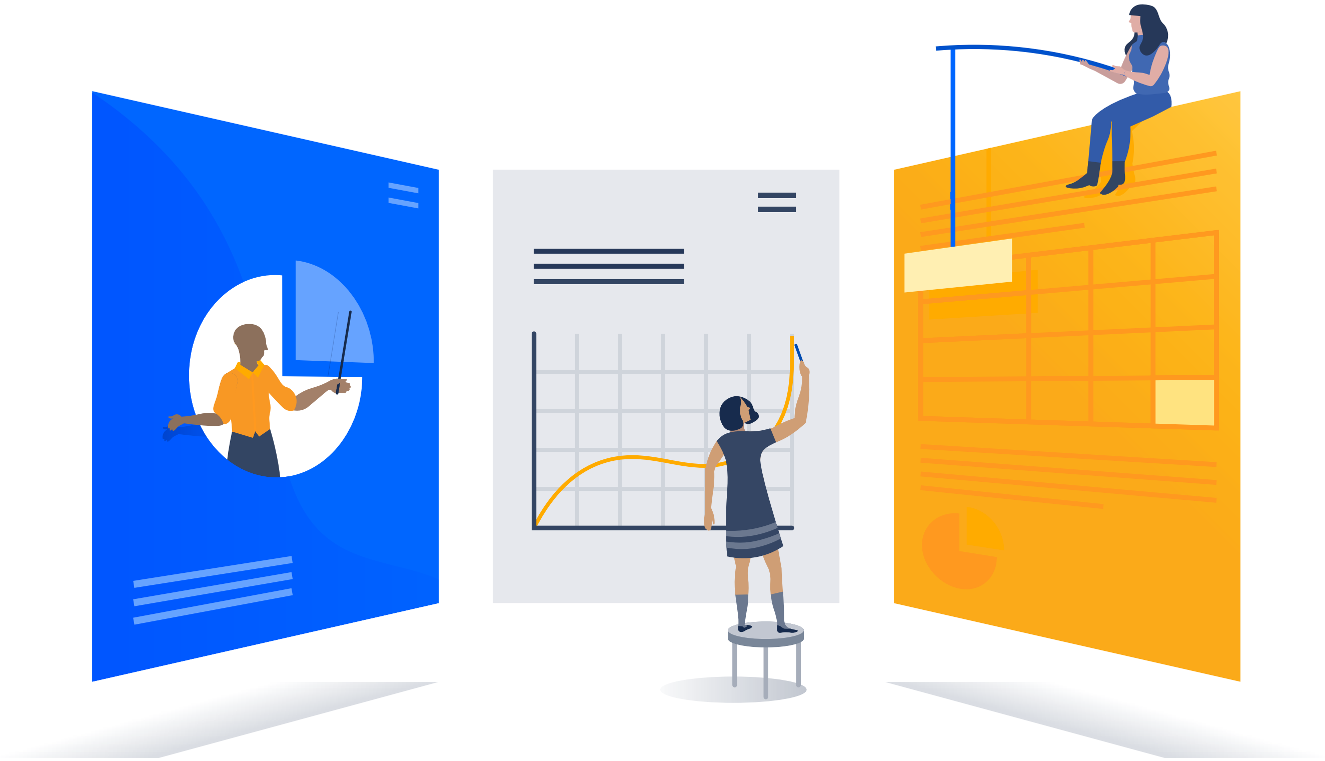
ATLASSIAN + GLiNTECH

Getting started with Portfolio for Jira



About the author

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GLiNTECH

Robin is a Portfolio for Jira buff and Atlassian Expert at GLiNTECH. He's been consulting and training people in the software world for 10 years, particularly in the project management space. Originally from Scotland, he now calls Sydney home, and when not at work can be found running or drinking wine.

Contents

This guide is designed to help you get started with Portfolio for Jira. It covers the 'need-to-knows' and advises on the best configuration for most teams. In addition to the core sections of the guide below, there are tips and advice provided throughout to help get you up and running in no time.

The guide is structured into four main parts with an appendix:

What you need to know:
Things to consider before you start

Tool essentials:
How to configure your projects and create your plan

How to action:
A ramp-up guide for using Portfolio

Become a planning master:
Best practices and tips for success

Wrap up

Part 1
What you need to know

Things to consider before you start

What is a plan in Portfolio for Jira?
A plan in Portfolio for Jira is an aggregated view of the issues, teams, and releases for your projects in Jira Software.

When creating a plan, you have three main factors to consider: *The work* that you're planning for, *the people* to do that work, and *the time* it takes to complete it.

Portfolio uses these three elements, denoted as **scope (the work), teams (the people to do the work),** and **releases (time),** to form your agile roadmap.

Think of them as the three levers to tweak your plan with; if you add more tasks to your plan, you either need more time to complete it, or additional people to get through it faster.

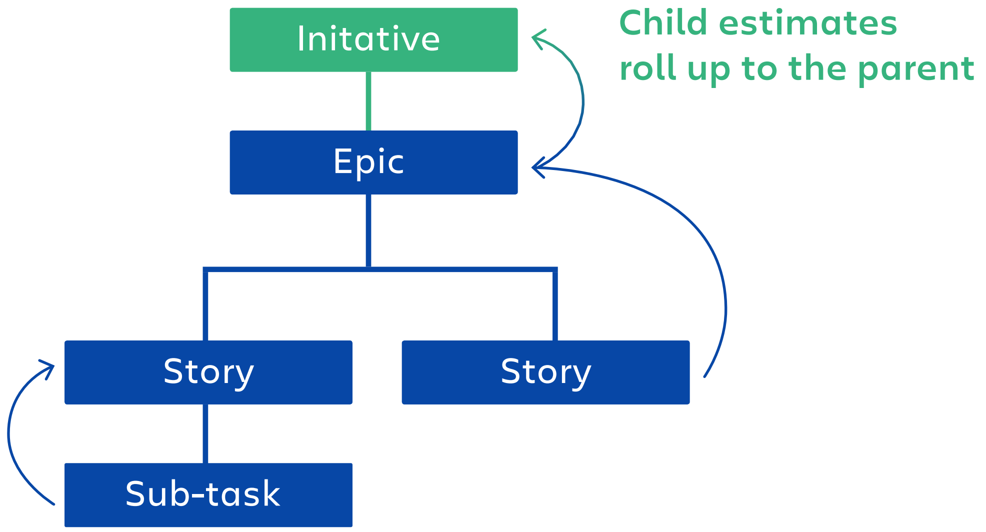
Or, if you push back your release date, you can either add more scope or free up some capacity amongst the people on your team.

Portfolio for Jira works by keeping these three levers balanced, letting you try out various scenarios to see which option suits best.

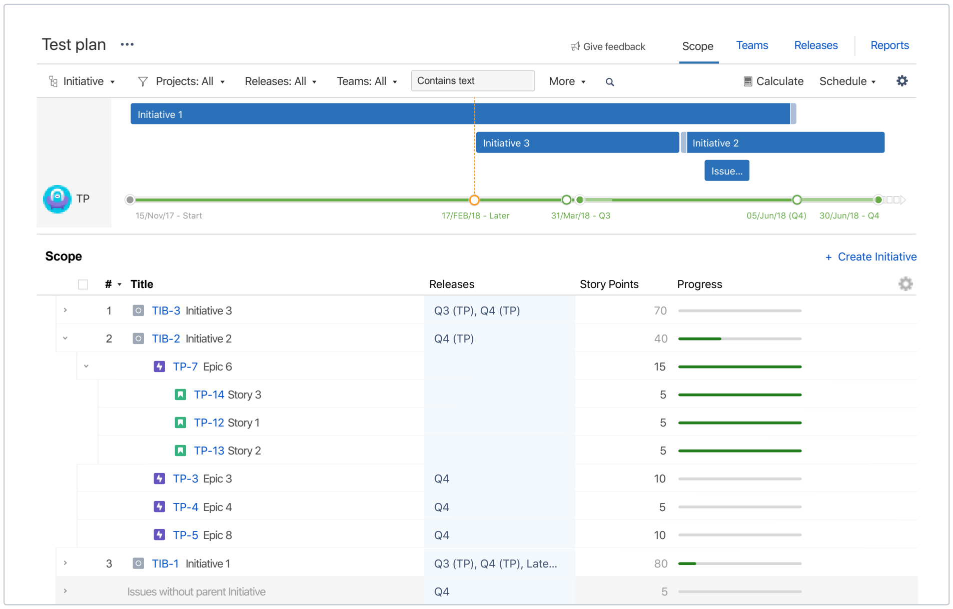
Issue hierarchy

In Jira Software, issue hierarchy exists with Epics and Stories. Epics are used to track large pieces of work, and are broken down into smaller Stories. Portfolio for Jira lets you plan and track at each of these levels, with the Stories' size (estimates) and progress rolling up to the Epic level.

Portfolio for Jira also allows you to define additional higher-up levels of hierarchy. The most common example is to add 'Initiatives'. These represent *even larger* pieces of work, and in the same way that Stories roll up to Epics, Epics in turn roll-up to Initiatives. This is the most common structure, but if required, further levels can also be added to represent *really large* bodies of work.



Adding an Initiative level of hierarchy provides a high-level view, which is great for big-picture planning sessions, communicating the progress of multiple Epics to stakeholders, as well as working with scaled agile frameworks.

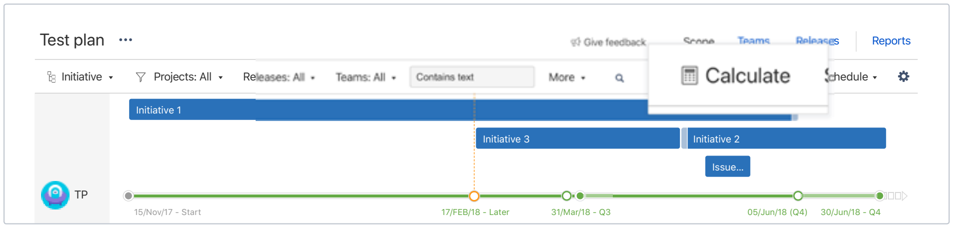


Scope

#	Title	Releases	Story Points	Progress
1	TIB-3 Initiative 3	Q3 (TP), Q4 (TP)	70	
2	TIB-2 Initiative 2	Q4 (TP)	40	
	TP-7 Epic 6		15	
	TP-14 Story 3		5	
	TP-12 Story 1		5	
	TP-13 Story 2		5	
	TP-3 Epic 3	Q4	10	
	TP-4 Epic 4	Q4	5	
	TP-5 Epic 8	Q4	10	
3	TIB-1 Initiative 1	Q3 (TP), Q4 (TP), Late...	80	
	Issues without parent Initiative	Q4	5	

Integration with Jira Software

Portfolio for Jira is tightly integrated with your Jira Software project data and boards. Every time you **calculate** your Portfolio plan, Portfolio pulls the latest data from your work in Jira Software. This 'pull' from Jira Software means you are always planning with the most up-to-date information.

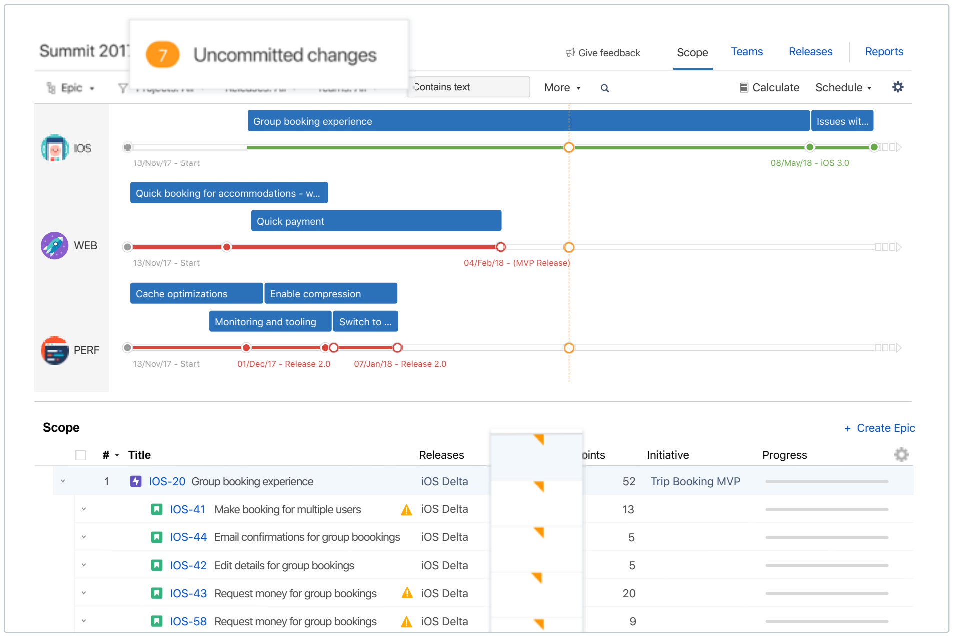


Conversely, the updates you make in your Portfolio plan will not be reflected in your Jira Software project until you review and **commit** specific changes.

For example, if you reordered the priority of Stories on your backlog in Portfolio for Jira, the ranking of those Stories would not change in Jira Software on the respective teams' backlog until you **commit** those changes.

This controlled flow of updates is a key feature of Portfolio for Jira. You can treat your plan like a sandbox environment, making changes and recalculating the roadmap to see the effect.

To help you keep track, the changes you make are highlighted in the scope table with an orange marker. These can be reviewed in summary by clicking the **uncommitted changes button** above the schedule. This lists all changes that have been made in the plan, but have not yet been committed to Jira Software. Simply **revert** any changes you're not happy with and **commit** only the updates you want to keep.



Scope

#	Title	Releases		oints	Initiative	Progress
1	IOS-20 Group booking experience	iOS Delta		52	Trip Booking MVP	
	IOS-41 Make booking for multiple users ⚠	iOS Delta		13		
	IOS-44 Email confirmations for group boookings	iOS Delta		5		
	IOS-42 Edit details for group bookings	iOS Delta		5		
	IOS-43 Request money for group bookings ⚠	iOS Delta		20		
	IOS-58 Request money for group bookings ⚠	iOS Delta		9		

Supporting your way of working

Portfolio is designed to support your way of working. If you have a mix of Scrum and Kanban teams, both can be included in your plan.

If some of your teams estimate in points, while others use hours or days, you can create a simple conversion from one to the other to include both in your plan. Just set the desired conversion ratio within your Portfolio plan configuration.

••• > Issue sources > Advanced settings

If some teams are relatively new to agile while others are more experienced, don't panic. And if you subscribe to a framework like SAFe, that's fine too. (We have an additional whitepaper about scaling agile with SAFe.)

The core concepts of agile planning are common across all these scenarios. Focusing on the quality of your data in Jira Software rather than the agile theory and ceremonies is what will improve your Portfolio roadmap overall.

Part 2
Tool essentials

How to configure your projects and create your plan

Create a plan

Creating a plan is easy. Select the Portfolio tab in Jira Software, click **create** then follow these five steps:

1. Enter a name for the plan
2. Select the scope of work for which you are planning. Remember that you can connect to multiple sources to create cross-team, multi-project plans.

   There are three types of issue sources:

   - **Board:** All issues on that board are included in your plan
   - **Project:** All issues in that project are included in your plan
   - **Saved Filter:** All issues included by the JQL filter you've created will be included in your plan

> **PRO TIPS**
> - It's best to connect to a board where possible. Portfolio for Jira will pull extra metrics, such as team velocity and sprint details from the board, that a project alone does not provide. Just make sure that your board's filter includes all of the issues you want included in the plan.
> - When starting out, keep your plan as simple as possible. Start with one team's board, then add more in as you become acquainted with the tool. Plans that include a large number of boards or projects can be difficult to consume due to the volume of issues.
> - Server users can also utilize the **Programs** feature to create a high level view of multiple plans, so there's no need to try and tackle everything in one go.

3. Next, select the relevant releases you want to work with. These map to the versions from your Jira Software issue sources. If you're unsure what releases you want, select them all and you can remove any unnecessary ones later. If you don't have any releases to choose from as you're getting started, don't worry. You can create them later inside of Portfolio for Jira.
4. You will be prompted to add your teams. By default, Portfolio for Jira creates a team per issue source. So for example, if you bring in three boards, Portfolio for Jira will create three teams. (These can be amended at any time once your plan has been created.)
5. Finally, confirm the issues that you wish to import (you can toggle the view between Epics and Stories and additional levels of hierarchy). If an Epic is selected then every issue associated with that Epic will be imported. If you don't want to import specific Epics or Stories, de-select the box next to them.

Portfolio navigation

And now you have a plan! The top-half of the page is the schedule, which shows your roadmap. Note that you may need to refine your plan (e.g. adding estimates to your issues) before seeing the roadmap view here.

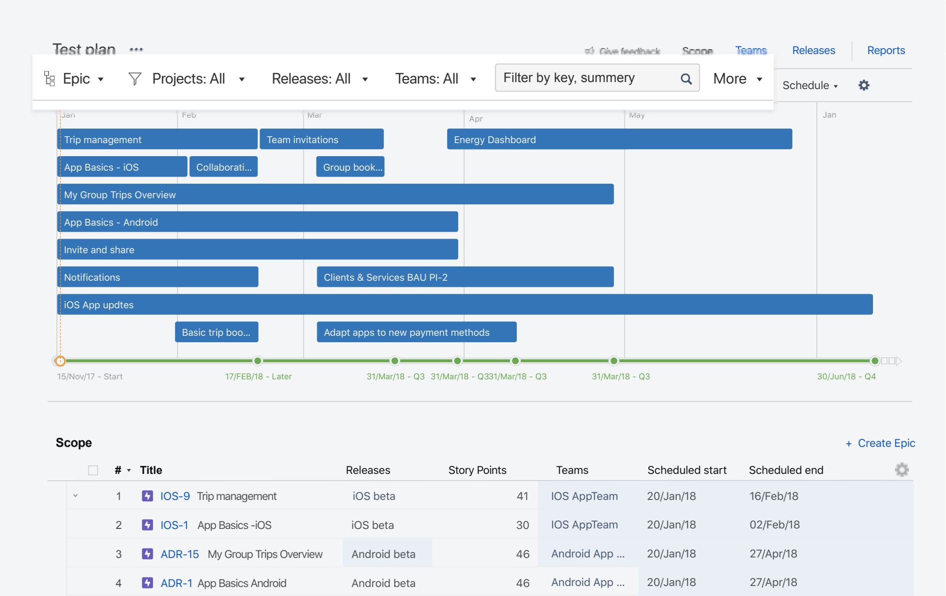
On the bottom-half of the page, you can toggle between each of Portfolio's three levers–**scope**, **teams,** and **releases**–using the tabs in the top right corner.

Schedule

The schedule creates a timeline view from the issues in your scope table. The scheduling of issues is based on an algorithm that takes into account multiple factors for each issue (e.g. backlog priority, size, dependencies, and so on–for more details see *understand the scheduling algorithm* on page 30). This means it's not possible to simply drag and drop issues.

The filter bar runs across the top of the schedule and allows you to switch between hierarchy levels and filter to create different views. The **calculate** button recalculates your schedule based on any changes—either those made in the plan, or in the Jira Software projects directly.

Filters to create different views of your plan



#	Title	Releases	Story Points	Teams	Scheduled start	Scheduled end
1	IOS-9 Trip management	iOS beta	41	IOS AppTeam	20/Jan/18	16/Feb/18
2	IOS-1 App Basics -iOS	iOS beta	30	IOS AppTeam	20/Jan/18	02/Feb/18
3	ADR-15 My Group Trips Overview	Android beta	46	Android App ...	20/Jan/18	27/Apr/18
4	ADR-1 App Basics Android	Android beta	46	Android App ...	20/Jan/18	27/Apr/18

Teams

Teams represents the people part of your plan. Portfolio needs to understand how quickly your teams get through work in order to forecast the completion dates for your backlog. It does this by defining your teams and using their velocity (for teams estimating in story points) or capacity (for teams estimating in time).

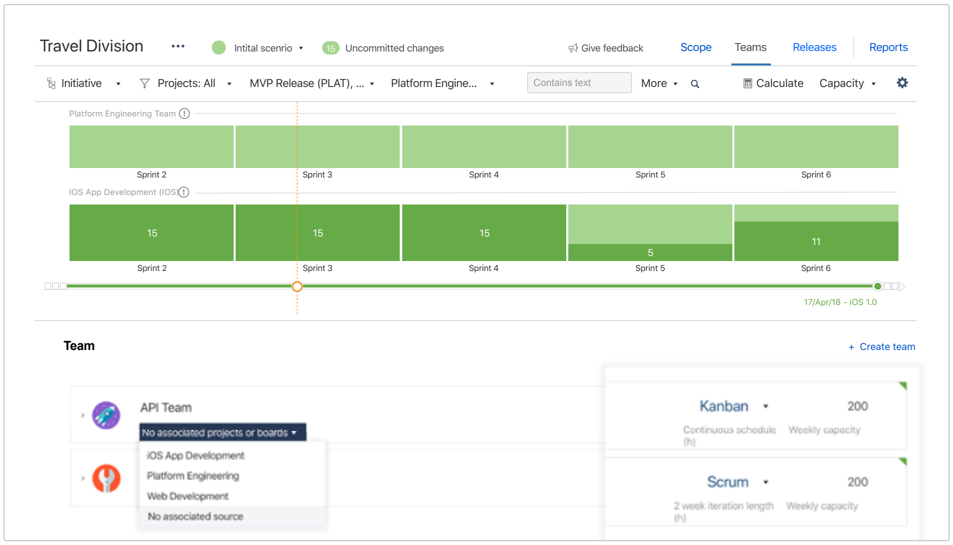
For Scrum teams estimating in story points, Portfolio can work out your expected sprint velocity based on the average of your past sprints. Alternatively, you can manually enter a value per team and change it at any time. If your Scrum team is relatively new, just enter your target velocity and review later if necessary.

For Kanban teams or Scrum teams estimating in time (hours or days), set the average hours of work per week that the team gets through. Remember, this is the average number of hours of work completed, which is not the same as the number of hours the team is at work!

> **PRO TIP**
> While it’s possible to add the named members of your team and enter their individual commitment, when getting started we recommend working at the team level (meaning you focus on effort as a team rather than the individual). This is more straightforward and requires far less admin overhead.

It helps to link your team to their Scrum or Kanban board so Portfolio knows the right team to assign work to. This is done via the drop-down box under the team name.

If there's **no associated issue source** (i.e. the team can work on scope from multiple boards), be sure to select the correct scheduling methodology for that team–Scrum or Kanban. Again, it's ok to have both types on your plan.



> **PRO TIP**
>
> Teams are a concept that is unique to Portfolio for Jira, and have no links to existing **project roles** or **groups** in Jira Software. But you can get visibility of the assigned team directly in your Jira Software issues–in addition to your Portfolio plan–by adding the teams field (created automatically when you installed Portfolio for Jira) to your projects' **create, edit** and **view** screens. (For additional information, see documentation for Cloud or Server.)

Releases

Releases can be thought of as the time element of your plan. While they typically represent versions in Jira Software, they can be used to mark the date you ship your product, a milestone, or any date commitment that you have made to your stakeholders. Note that you can ‘pull’ releases from Jira Software or create them directly in Portfolio (and then commit them back to Jira Software when you’re ready).

Stories, Epics, and Initiatives can be assigned to a release, with Portfolio calculating when that work will collectively be completed.

The timeline shows upcoming releases, depending on how they are configured. The **start date** can either be:

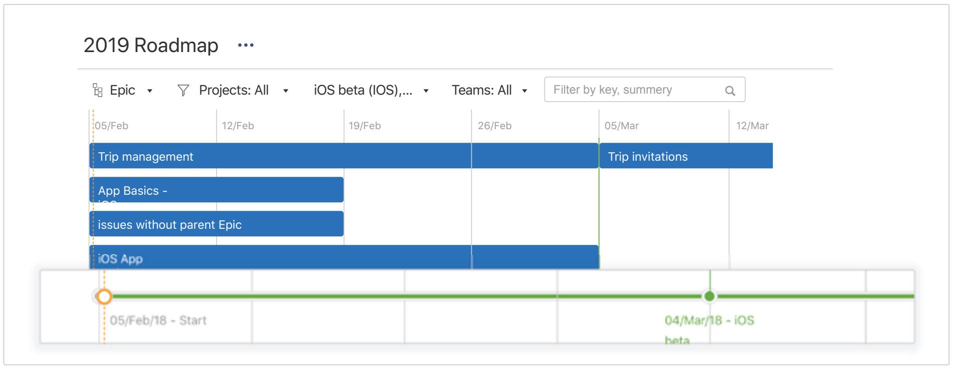
- A fixed date (i.e start on March 3rd)
- As soon as possible (i.e. as soon as there is capacity to do so)
- Set relative to the previous release end-date (i.e. start one day after the previous release completes)

> **PRO TIP**
> If you release sequentially, use this last option. This means if the end-date of a release changes, the start of the next release is automatically updated.

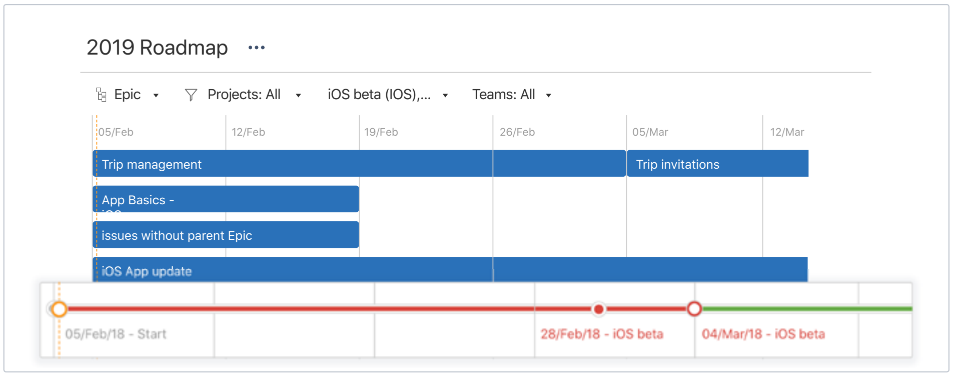
The **end date** can either be **dynamic,** where Portfolio will calculate when your release is able to ship, or **fixed** where you set the dates and Portfolio calculates whether you can ship by the date you specified.

These are shown on the timeline as:

Dynamic end-date releases are represented as a single dot on the timeline. Being dynamic, these releases can move along the timeline, depending on the amount of work assigned to them and the teams involved.



Fixed end-date releases are represented by a pair of dots on the timeline. One shows the end-date as set in the version; the other shows the forecast end-date–showing you the difference between your goal and reality.



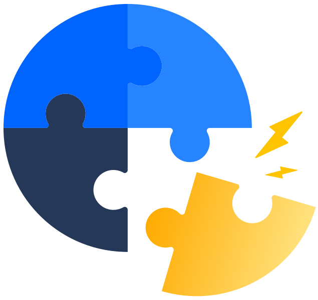
Your plan can contain a mix of dynamic and fixed releases. It's useful to set dynamic dates in the initial stages of planning to get some indicative dates. When you settle on a plan, you can switch to a fixed date and track your progress against that date.

Portfolio introduces the concept of a **later** release. This can be considered a holding pool for future work, and it is great for managing work that you're not ready to assign just yet (therefore the release is set to **calculate**). Later releases always have a dynamic end-date and fall after the last defined release in your project.

Scope

The scope table is where you manage your Jira Software issues and where you can try (and retry) most of your planning adjustments. This can happen at each level of hierarchy–select the tier you want using the drop-down above the schedule.

There is a lot of information available in the scope table–too much to display easily in one view. Columns can be included or removed as necessary, and the filter bar above the schedule allows you to tailor the scope shown.



Add/Remove columns

You can add or remove columns using the cog above the scope table. As a starting point, think about surfacing just the following columns:

- Releases
- Story points
- Team
- Scheduled start/end
- Progress

> **PRO TIP**
> Set the schedule time frame to ~3 months when starting; larger horizons can be difficult to interpret.

You'll notice that some cells in the scope table are shown in white, while others are shaded blue. This denotes whether the value has been manually selected (white) or is being proposed by Portfolio's scheduling algorithm (blue).

Scheduling algorithm

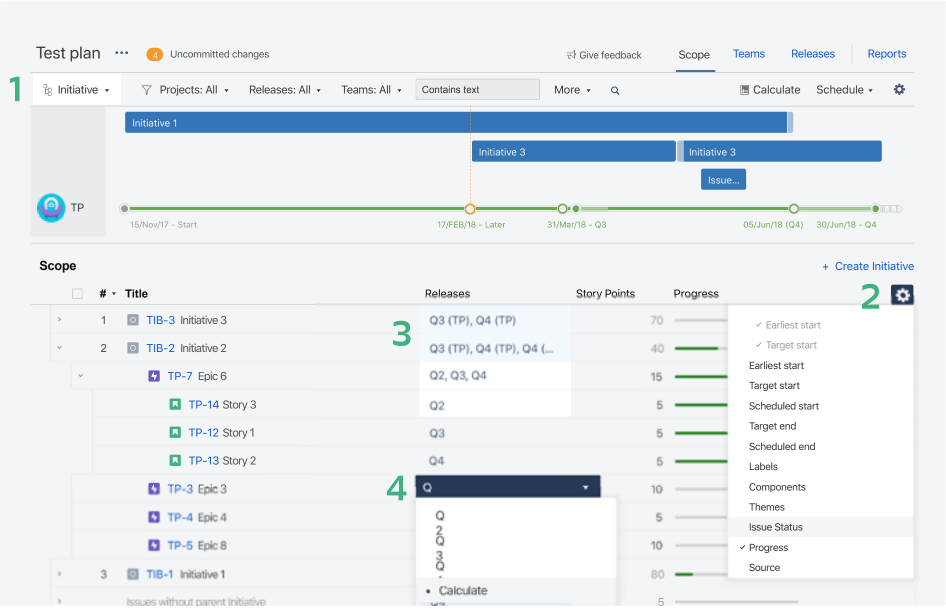
Portfolio's scheduling algorithm looks at multiple factors when creating your plan: the priority of your backlog, estimates, dependencies and more. See page 30 for a full description.

Portfolio will honour any manual assignments you make, so if a Story has been put in a certain sprint, or attached to a particular release, that will be reflected in the plan. For work that is not specifically assigned, Portfolio will suggest the best fit; i.e the next sprint with sufficient capacity (for Scrum) or the next working day with space (for Kanban).

If an item has not been directly assigned, selecting the calculate option in the drop-down will show Portfolio's proposed value.

You can access more detail on each issue by clicking the Jira Software issue key and opening the detail panel. This allows you to update some additional information, such as:

- **Parent:** To link a Story to its Epic, or an Epic to an Initiative
- **Dependencies:** Identify blockers and ensure Portfolio schedules them accordingly
- **Earliest start**: Manage a constraint and force the earliest date an issue can be scheduled



#	Title	Releases	Story Points	Progress
1	TIB-3 Initiative 3	Q3 (TP), Q4 (TP)	70	
2	TIB-2 Initiative 2	Q3 (TP), Q4 (TP), Q4 (...	40	
	TP-7 Epic 6	Q2, Q3, Q4	15	
	TP-14 Story 3	Q2	5	
	TP-12 Story 1	Q3	5	
	TP-13 Story 2	Q4	5	
	TP-3 Epic 3	Q	10	
	TP-4 Epic 4		5	
	TP-5 Epic 8		10	
3	TIB-1 Initiative 1		80	
	Issues without parent Initiative		5	

1. *Hierarchy filter*
2. *Cog to add and remove columns to the scope table*
3. *Blue shading implies that Portfolio has calculated a value for you*
4. *Choose to manually assign a value or have Portfolio calculate a value for you*

Configure Jira Software to add additional levels of hierarchy

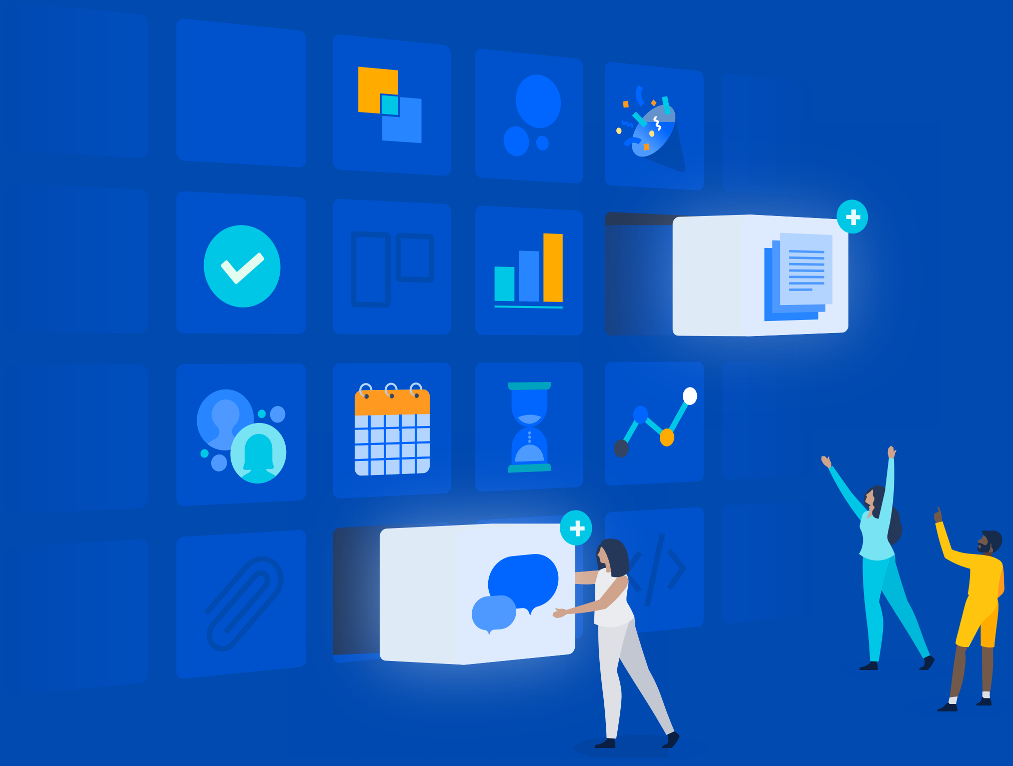
Portfolio allows you to create additional levels of hierarchy above Epic level, for example ‘Initiatives’. This new level can then be mapped to its related issue type in Jira Software to dictate which issues get rolled up to their parent.

> **PRO TIP**
> Not sure about hierarchy? Don’t worry, you can change this later. Just work with Epics and Stories initially.

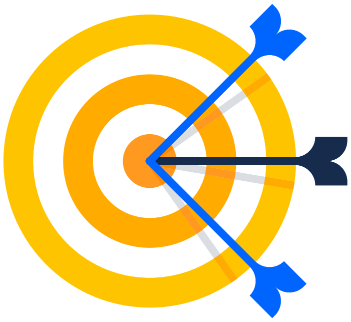
To add an Initiative level:

1. Create a new issue type called ‘Initiative’ in **Jira > Administration > Issues > Issue types**
2. Go to **Portfolio > Settings > Portfolio Hierarchy Configuration**
3. Click **+ Create Level** and name it ‘Initiative’
4. Map this to your new ‘Initiative’ issue type and click **Apply**
5. Click **Save Changes**

To give visibility of this new hierarchy in Jira Software, add the ‘parent-link’ field (created automatically when you added Portfolio for Jira) to your Epic **create**, **edit,** and **view** screens. This allows you to associate Epics with their parent Initiative directly in your Jira Software project, as well as in your Portfolio plan. (For additional information, see documentation on this for Cloud or Server.)



Part 3
How to action



A ramp-up guide for using Portfolio

Having covered the core concepts and the tool essentials, you're now ready to use Portfolio!

Portfolio can take some time to master fully. But don't worry, by following this three step ramp-up list, you can implement Portfolio in phases as your experience with the tool matures.

Each section outlines some of the key reasons why people use Portfolio, and highlights the areas that require your focus to get the most value from it. The sections build on each other, so spend time understanding each outcome.

1 Create a roadmap

Start by creating a plan based on your existing Jira Software project data and rolling it up into a roadmap.

WHAT YOU GET

- Visibility of your planned work, in context
- A roadmap showing the issues from each of the projects in your plan
- Forecasted start and end dates for all Stories, Epics, and Initiatives
- Tracking of progress that rolls up to each additional level of hierarchy

HOW TO GET IT

Focus on just three things:

- Prioritizing your backlog (the preferred order of your work)
- Creating estimates for your work (how big your work is)
- Understanding your team's velocity or capacity (how fast your teams are likely to get through that work)

The first benefit you unlock when you create a Portfolio plan is pulling all your issues into Portfolio's scope table (a spreadsheet-like view). This gives you a unique vantage point on your Jira Software issues where you can easily see how all your work fits into the big picture (for example, seeing all the Stories that map back to a specific Epic).

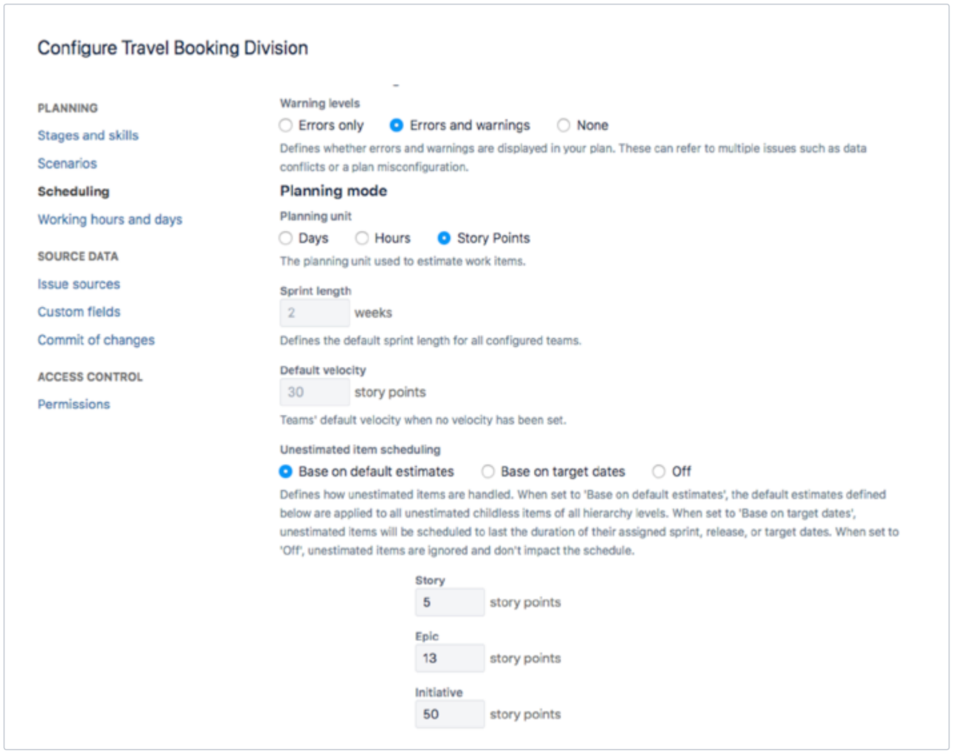
By knowing your preferred order of that work, how big the work is, and how fast your teams are likely to get through it, it allows Portfolio to create the roadmap view.

Often, the biggest challenge here is that a lot the teams' backlogs are un-estimated, meaning Portfolio can't predict how long they will take to complete. Effective estimation is a challenge in all areas of planning, but Portfolio can help by creating default estimates.

You can set default values for un-estimated work. This means your roadmap can be more meaningfully calculated, with all tasks being represented. The Stories and Epics will still show as un-estimated to your teams in Jira Software, and as soon they enter an estimate that value will replace the placeholder number in your plan.

How to set default estimates:

1. Go to **... > Scheduling > Unestimated item scheduling**
2. Check **Base on default estimates**



Configure Travel Booking Division

PLANNING

Stages and skills

Scenarios

Scheduling

Working hours and days

SOURCE DATA

Issue sources

Custom fields

Commit of changes

ACCESS CONTROL

Permissions

Warning levels

○ Errors only ● Errors and warnings ○ None

Defines whether errors and warnings are displayed in your plan. These can refer to multiple issues such as data conflicts or a plan misconfiguration.

Planning mode

Planning unit

○ Days ○ Hours ● Story Points

The planning unit used to estimate work items.

Sprint length

2 weeks

Defines the default sprint length for all configured teams.

Default velocity

30 story points

Teams' default velocity when no velocity has been set.

Unestimated item scheduling

● Base on default estimates ○ Base on target dates ○ Off

Defines how unestimated items are handled. When set to 'Base on default estimates', the default estimates defined below are applied to all unestimated childless items of all hierarchy levels. When set to 'Base on target dates', unestimated items will be scheduled to last the duration of their assigned sprint, release, or target dates. When set to 'Off', unestimated items are ignored and don't impact the schedule.

Story

5 story points

Epic

13 story points

Initiative

50 story points

2 Release forecasting

Building on your roadmap from section one, you can include releases on your timeline to see when certain phases of work will be completed.

WHAT YOU GET

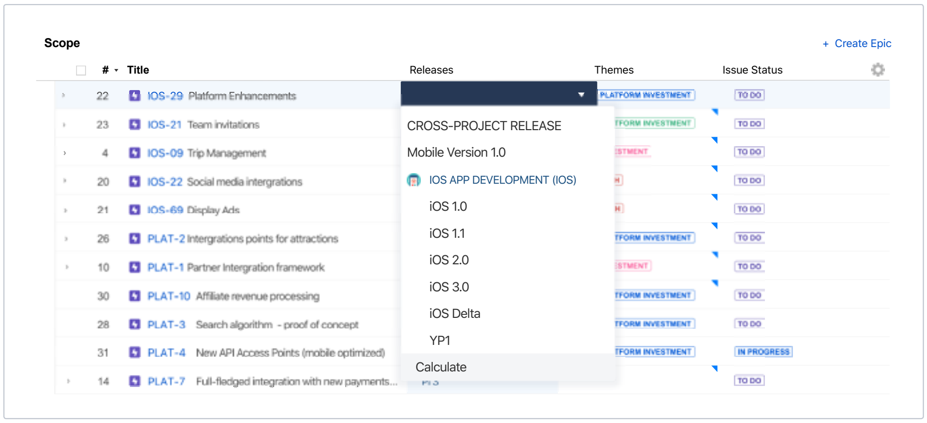
- Real-time views of whether you will release on time
- Forecasted delivery dates for future releases
- Suggested release assignments based on available capacity

HOW TO GET IT

First you need a release to assign work to. Releases are just **versions** in your Jira Software project. The releases tab in Portfolio will show what versions you've chosen to pull from each project. You can create new versions in your Jira Software project (and they will appear in your Portfolio plan) or they can be created in Portfolio and you can **commit** them back to Jira Software when you're ready.

Set your release end-dates to **dynamic** for a forecast completion date. If you'd like to see whether you can deliver your release within a specific timeframe use **fixed** end-dates.

Portfolio can also suggest the releases to which your issues should be assigned. To do this, use the drop-down in the scope table to **calculate**.

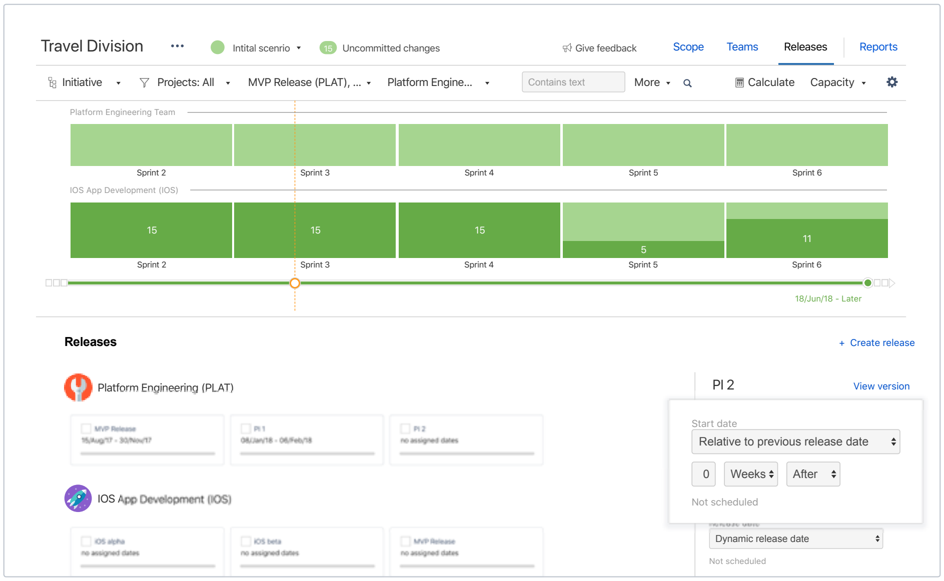


Scope

+ Create Epic

#	Title	Releases	Themes	Issue Status
22	IOS-29 Platform Enhancements		PLATFORM INVESTMENT	TO DO
23	IOS-21 Team invitations		TFORM INVESTMENT	TO DO
4	IOS-09 Trip Management		STMENT	TO DO
20	IOS-22 Social media intergrations		H	TO DO
21	IOS-69 Display Ads		H	TO DO
26	PLAT-2 Intergrations points for attractions		TFORM INVESTMENT	TO DO
10	PLAT-1 Partner Intergration framework		STMENT	TO DO
30	PLAT-10 Affiliate revenue processing		TFORM INVESTMENT	TO DO
28	PLAT-3 Search algorithm - proof of concept		TFORM INVESTMENT	TO DO
31	PLAT-4 New API Access Points (mobile optimized)		TFORM INVESTMENT	IN PROGRESS
14	PLAT-7 Full-fledged integration with new payments...	PI 3		TO DO

This works best if you align your releases sequentially (drag-and-drop them on the release tab) with the start date of each release following the end-date of its predecessor. Portfolio can then suggest which releases still have capacity for additional scope. Note: this only works with fixed end-date releases.



Start date: Relative to previous release date

0 Weeks After

Not scheduled

Dynamic release date

Not scheduled

3 What-if scenario planning

Portfolio not only provides visibility on your existing project data; it lets you plan different scenarios in a sandbox environment, view the outcome, and choose to keep or discard those changes.

This scenario-based planning allows you to plan and (most importantly) re-plan, based on your team's activity.

WHAT YOU GET

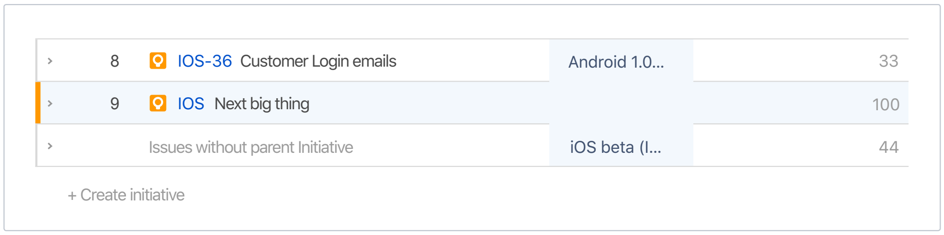
- The ability to try out different scenarios and find the best path forward for your plan
- Introduce new scope to your plan and view the impact to your release date and existing work

HOW TO GET IT

Know which of the levers you can actually change in reality. Often, resources or deadlines are not that flexible, meaning that scope is the only real variable. Be aware of what options are possible for you, and use Portfolio to model the impact of changing them.

A great use case for scenario planning is to model how new Initiatives could affect your in-flight projects. Portfolio will use its scheduling algorithm to calculate likely start and end dates and show any impact to your existing work.

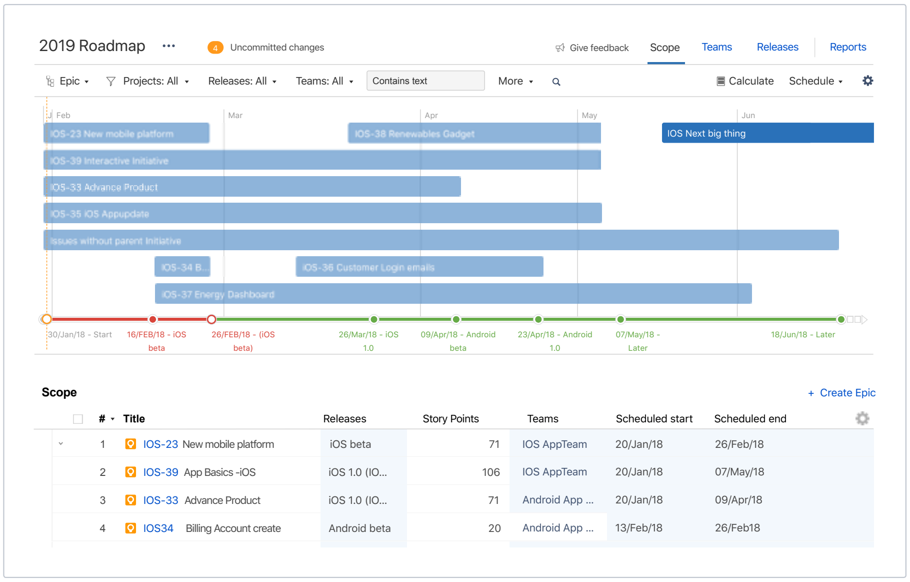
Start by creating new Initiatives or Epics in Portfolio for upcoming work. These can be high-level placeholders for work in the ideation phase. Just make sure they have an estimated size (in points or time).



›	8	IOS-36 Customer Login emails	Android 1.0...	33
›	9	IOS Next big thing		100
›		Issues without parent Initiative	iOS beta (I...	44

+ Create initiative

Calculate your plan and Portfolio will forecast when that work will kick off and complete, based on your current workload.



Scope

#	Title	Releases	Story Points	Teams	Scheduled start	Scheduled end
1	IOS-23 New mobile platform	iOS beta	71	IOS AppTeam	20/Jan/18	26/Feb/18
2	IOS-39 App Basics -iOS	iOS 1.0 (IO...	106	IOS AppTeam	20/Jan/18	07/May/18
3	IOS-33 Advance Product	iOS 1.0 (IO...	71	Android App ...	20/Jan/18	09/Apr/18
4	IOS34 Billing Account create	Android beta	20	Android App ...	13/Feb/18	26/Feb18

You can then try changing the backlog priority, assigning different teams, or changing releases. Click **calculate** after each change to view the update as well as its impact to your other work.

When you find the best mix of scope, teams, and release assignments, **commit** your changes by ‘pushing’ them to Jira Software (creating the Initiative or Epic in the relevant project in this example) and then start tracking progress on that work.

Part 4
Become a Planning Master

Best practices and tips for success

"Planning is a quest for value"
MIKE COHN, AGILE TRAINER & AUTHOR

Like all things agile you need to iterate and refine your process with Portfolio for Jira. So far we've covered the basics to get you started. To take your planning to the next level, follow some of these best practices and tips.

Understand the scheduling algorithm

The scheduling algorithm takes the latest information from your projects to produce a realistic, data-driven roadmap. While a roadmap can simply be produced using only estimates and team velocity, it gets much more granular as you provide more variables.

By knowing what factors drive the scheduling algorithm to plan the way it does, you can more easily create the best roadmap for your needs.

The scheduling algorithm is driven by:

- **Estimates:** The expected work effort measured in story points, hours, or days
- **Team velocity:** How much work effort or how many hours a team can complete in a regular cadence
- **Priority:** The rank of items in Portfolio's scope table that reflects the backlog priority of your issues. Drag and drop items on the

backlog to re-prioritise them. (Not to be confused with the 'priority' select-list field, which has options like blocker, major, and minor—this has no effect on scheduling.)

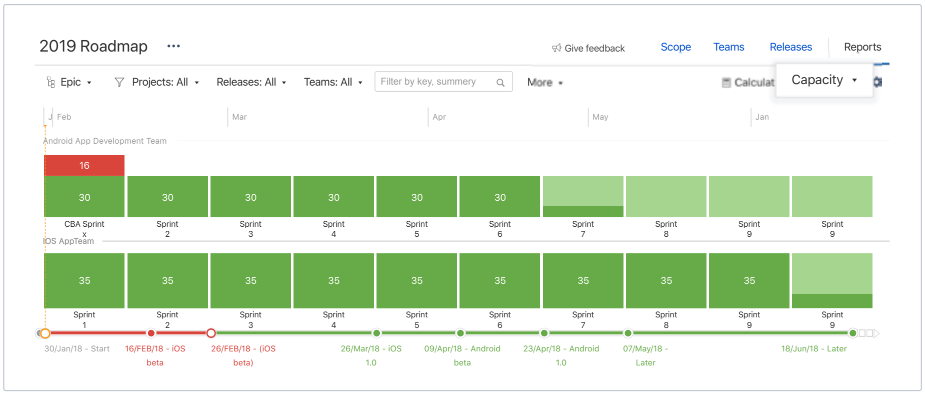
- **Release:** Assignment of issues to releases and the start and end dates of those releases
- **Dependencies:** Blocked or blocking items between backlog items
- **Configurable constraints:** For example, the earliest start date for a Story
- **Availability:** Teams and team member availability
- **Skills:** Amount of a work item's estimate that requires a particular skill. Skills can be associated with individual team members.
- **Work stages:** Activities that can happen either in parallel or sequentially

> **SERVER TIP**
>
> To help you understand why a particular task is scheduled as it is, use the **scheduling factors** section in the **issue detail panel**. This shows the most and least important factors affecting the scheduling of an item. It also gives tips on the options to move the work earlier or later in the plan.

Understand the capacity of your team

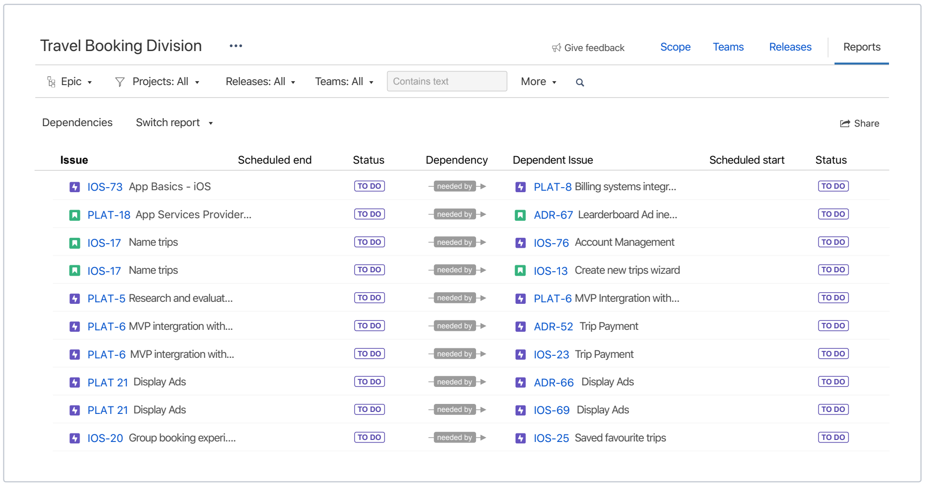
A good roadmap is invaluable, but it doesn't give the full Story. For that we need to view **capacity**.

Toggle from the schedule view to **capacity** to see the work commitment by team (or even by person). This is a great way of checking if teams are overcommitting to work (shown in red).



Overcommitting to work not only means tasks are likely to remain incomplete at the end of the sprint, but can impact other teams that have dependencies on that work.

> **PRO TIP**
> To get a clear sense of dependencies across teams, check out Portfolio for Jira's **dependencies report.**



Issue	Scheduled end	Status	Dependency	Dependent Issue	Scheduled start	Status
IOS-73 App Basics - iOS		TO DO	needed by	PLAT-8 Billing systems integr...		TO DO
PLAT-18 App Services Provider...		TO DO	needed by	ADR-67 Learderboard Ad ine...		TO DO
IOS-17 Name trips		TO DO	needed by	IOS-76 Account Management		TO DO
IOS-17 Name trips		TO DO	needed by	IOS-13 Create new trips wizard		TO DO
PLAT-5 Research and evaluat...		TO DO	needed by	PLAT-6 MVP Intergration with...		TO DO
PLAT-6 MVP intergration with...		TO DO	needed by	ADR-52 Trip Payment		TO DO
PLAT-6 MVP intergration with...		TO DO	needed by	IOS-23 Trip Payment		TO DO
PLAT 21 Display Ads		TO DO	needed by	ADR-66 Display Ads		TO DO
PLAT 21 Display Ads		TO DO	needed by	IOS-69 Display Ads		TO DO
IOS-20 Group booking experi....		TO DO	needed by	IOS-25 Saved favourite trips		TO DO

The importance of data quality

Data quality (when the underlying issues in Jira Software are unestimated, incorrect, or not up-to-date) is usually the biggest hurdle people face getting started with Portfolio for Jira.

Improving data quality should be an ongoing pursuit. One way to focus your attention here is to look at improving your agile maturity. Portfolio for Jira is an agile scheduling tool, and as such, increased agile maturity in areas such as backlog estimation, prioritization, and stable team velocity will all improve your data quality.

One of the easiest ways to improve the quality of the data Portfolio uses is to add default values for unestimated work (as mentioned in the "Create your roadmap" section previously).

Also, have a quick sanity check on the forecasted end-dates for your work. If your backlog for next quarter is scheduled to take a year, review your backlog!

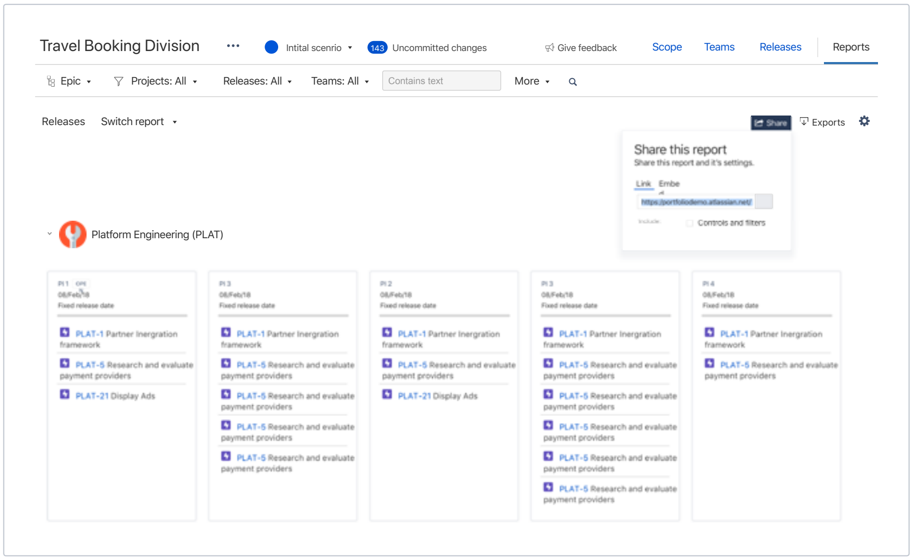
rubbish in = rubbish out

Every improvement you make refines your roadmap further and raises the quality of reporting across Jira.

Sharing your plan with stakeholders

A plan only works if everyone knows about it. Sharing your roadmap, and providing visibility to all your stakeholders is essential for success.

Think about how you are going to communicate your plan, and leverage some of Portfolio's reports to share the love. Portfolio's reports are a great way to share a dedicated live view of your plan. For example, say you want to share the roadmap for just the iOS team with your manager for a specific date range. You can filter your plan to just see the relevant data, then generate a URL to share.



Share this report

Share this report and it's settings.

https://portfoliodemo.atlassian.net/

PI 1 — 08/Feb/18 — Fixed release date

- PLAT-1 Partner Inergration framework
- PLAT-5 Research and evaluate payment providers
- PLAT-21 Display Ads

PI 3 — 08/Feb/18 — Fixed release date

- PLAT-1 Partner Inergration framework
- PLAT-5 Research and evaluate payment providers
- PLAT-5 Research and evaluate payment providers
- PLAT-5 Research and evaluate payment providers
- PLAT-5 Research and evaluate payment providers

PI 2 — 08/Feb/18 — Fixed release date

- PLAT-1 Partner Inergration framework
- PLAT-5 Research and evaluate payment providers
- PLAT-21 Display Ads

PI 3 — 08/Feb/18 — Fixed release date

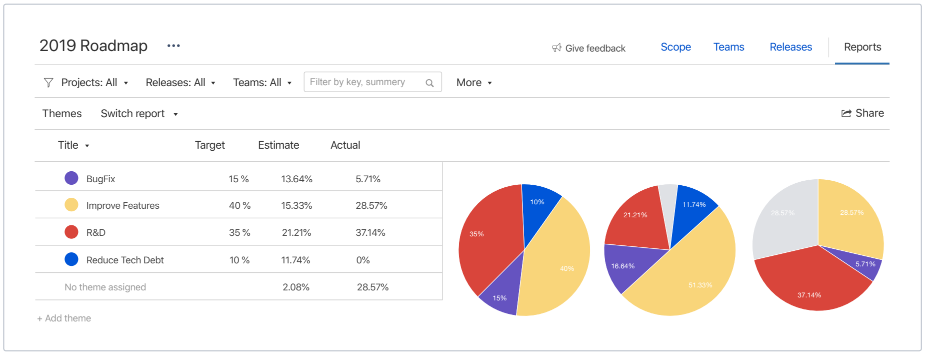
- PLAT-1 Partner Inergration framework
- PLAT-5 Research and evaluate payment providers
- PLAT-5 Research and evaluate payment providers
- PLAT-5 Research and evaluate payment providers
- PLAT-5 Research and evaluate payment providers
- PLAT-5 Research and evaluate payment providers

PI 4 — 08/Feb/18 — Fixed release date

- PLAT-1 Partner Inergration framework
- PLAT-5 Research and evaluate payment providers

Using the themes report

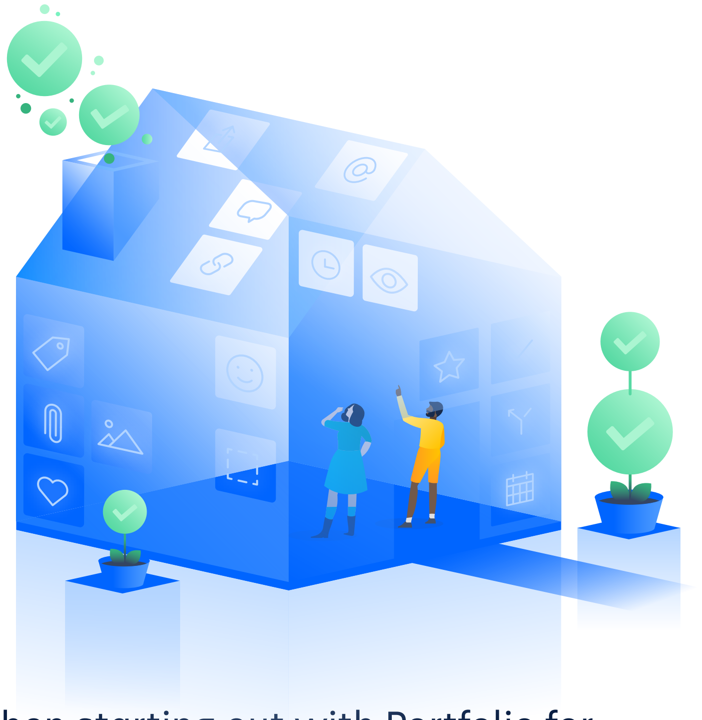
If you want to report on how your roadmap items connect back to an organization-wide focus area, then you might want to use **themes**. These track how your work measures against strategic objectives. Get a real-time comparison between your target distribution of work and the upcoming planned work.



Projects: All · Releases: All · Teams: All · Filter by key, summery

Title	Target	Estimate	Actual
● BugFix	15 %	13.64%	5.71%
● Improve Features	40 %	15.33%	28.57%
● R&D	35 %	21.21%	37.14%
● Reduce Tech Debt	10 %	11.74%	0%
No theme assigned		2.08%	28.57%

Simply create your required themes (e.g. R&D or Mobile) directly in the themes report, and add your target percentage. Then on the scope table, click the cog to add the **themes** column and to tag your issues accordingly. If you tag something at the Epic level, all relevant Stories will also be tagged with that theme.



Wrap up

There's a lot to consider when starting out with Portfolio for Jira, but the insight and visibility it provides mean your effort will be rewarded!

Our top tip is to start off small and keep it simple, using this guide to get to grips with the basics.

Above all else, be agile. Start planning, look at how you did, and improve. You'll be a planning master in no time!

Additional resources:

- Still have questions? Reach out to a Portfolio for Jira specialist for help or ask questions in our community.
- We have a weekly demo webinar with live Q&A that walks through parts of this guide (also available on-demand)
- Check out our Portfolio for Jira documentation
- Learn how other businesses use Portfolio for Jira with our Portfolio for Jira case studies
- Go deeper with our Atlassian University Portfolio for Jira course
- Frequently asked questions for Cloud and Server

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