PLANVIEW®

EFFECTIVELY PLAN, MANAGE, AND CONTROL PROJECTS AND RESOURCES

Planview® Project Portfolio Management gives you the tools you need to effectively manage projects and resources across your entire portfolio – and across the enterprise.

Planview Project Portfolio Management provides clear, easy-to-understand dashboard views that display information on planning, managing, and tracking projects. Automatic alerts inform managers and other users when changes have been made to risk, resources, allocations, and other key performance indicators.

Planview Project Portfolio Management leverages consistent, repeatable, auditable processes driven by Planview PRISMS™ IT management best practices. Planview PRISMS helps you improve performance by focusing on projects and delivering guidance through documentation, software automation, implementation, and an expert online community.

Proven, easy-to-use features enable you to accurately estimate and plan work; assign staff and other resources; collaborate on work; achieve financial control; identify and mitigate project risks; and fully manage a project lifecycle from request through delivery of business value.

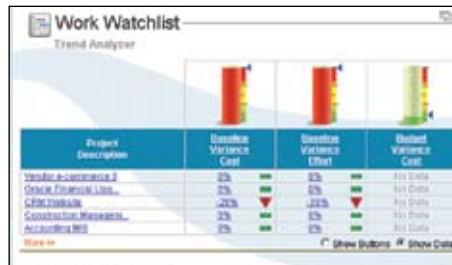## Better Manage, Prioritize, and Review Project Requests

Through the powerful Request Management feature, users have a single, centralized location where they can request work, check status, delegate requests, and review lifecycles. Managers can easily prioritize, review, and track project requests. Dispatchers can properly delegate the work request based on its size and characteristics — from simple Help Desk tickets to major projects. Users can collaborate across the organization, dramatically increasing productivity and workplace efficiencies.

Closely Analyze Trends for Portfolios

Portfolio Management supports informed, timely decision making for projects. Users can access comprehensive information regarding trend analyses, baselines, critical paths, and resource usage. Project managers can closely track projects, time, and resources while providing executives with visibility into IT spending and projects. Upper management can review IT performance and determine which projects the company can undertake and which need to be pushed back or declined. Automated lifecycles within Portfolio Management guide requests, manage approval, and support financial planning and scheduling.

Comprehensive information on trend analysis enables users to make informed, timely decisions about projects.

Planview Enterprise

Planview Project Portfolio Management (PPM) is an integrated component of the Planview portfolio management solution known as Planview Enterprise. This solution optimally balances the supply of IT resources with business demands and automates PRISMS adaptive best practices to deliver proven methods for cost savings and value creation. Other components of Planview Enterprise include Planview Enterprise Portfolio Management (EPM) for strategic planning and Planview Service Portfolio Management (SPM) for business service delivery.

Why Use Planview Project Portfolio Management?

Planview Project Portfolio Management enables you to:

- Optimize resources enterprise-wide
- Drive integrated decision making
- Mitigate risks and manage changes
- View project performance and trend analysis

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Benefit from Planview PRISMS Adaptive It Best Practices:

Planview PRISMS is designed to help technology organizations deliver value through a comprehensive, systematic approach to:
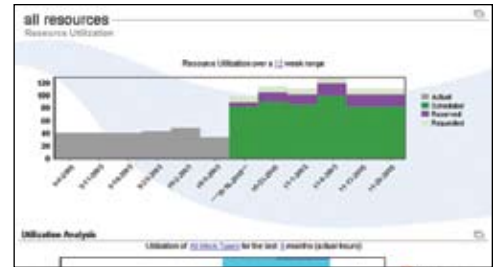
- measuring and analyzing current performance
- comparing actual results with clearly defined business requirements
- analyzing and documenting decisions
- efficient execution of change initiatives

Effectively Plan and Control Projects

With Project Management, users gain enterprise-wide visibility that helps speed time-to-delivery by ensuring projects are completed on time and on budget. Flexible dashboards and analytic tools are provided for work performance measurement, scheduling, planning and resource assignments. Comprehensive reports deliver easily accessible project performance data to the entire organization. Managers can assign an owner for issues so that a single person will be responsible for the issue's resolution and documentation. Estimation tools include basic templates that can be easily adjusted according to specific project parameters. Other templates include a list of essential project requirements and milestones, helping to ensure that users take into consideration all necessary factors.

Manage Resources Across the Organization

Planview Resource Management provides dashboards and reporting tools for staff management, staff assignments, and long-range staff planning. Managers can perform a skills inventory and assign the appropriate person to the right job, thereby lowering labor costs, increasing productivity, and improving utilization percentages. A flexible tool for resource conflicts allows managers to allocate resources according to priority, helping to resolve conflicts in work assignments among several projects.

Planview Project Portfolio Management reports on key information regarding resources.

Enhance Record Keeping and Auditability

Automated time records and billing, backed by regular reports, help managers control time and expenses. By replacing traditional stand-alone time-entry systems, managers can increase efficiency, improve regulatory compliance, and reduce under-capitalization by allowing users to properly bill. Resources can report time and expenses on a regular basis and even include explanatory notes regarding specific time and expense items.

Improve Decision Making

Enhanced ease of use helps managers improve performance, drive adoption, and strengthen enterprise-wide communication — all leading to better decision making. A user-friendly interface supports a customizable homeview, email notifications, and flexible collaboration via EMC Documentum eRoom. Dashboards provide quick visual indicators of the health and status of portfolios. Dashboards can be easily customized by individual users to display high-level summaries of portfolios, projects, and resources.

Seamlessly Integrate with Strategies, Services, and Assets

Planview Project Portfolio Management seamlessly integrates with Planview Enterprise Portfolio Management to successfully align your business goals with resource assignments. Capabilities such as top-down and bottom-up adjudication coordinate strategic plans throughout your organization and effectively bridge the gap between business and IT. In addition, Planview Project Portfolio Management integrates with Planview Service Portfolio Management to ensure that the delivery of business services supports overall business objectives.

In short, Project Portfolio Management enables you to deliver the right information at the right time to the right stakeholders, helping to achieve comprehensive IT portfolio management and align IT with business goals.

PROJECT PORTFOLIO MANAGEMENT OVERVIEW

FUNCTION	DESCRIPTION	BENEFIT
REQUEST MANAGEMENT	Provides a single, centralized location where users can request work, check status, delegate requests, and review lifecycles.	Easily manage, prioritize and review project requests. Expedite response and resolution.

FEATURE	ADVANTAGE
REQUEST WORK	Captures a work request in one centralized location, to be managed by dispatchers.
REQUEST DELEGATION	Allows the dispatcher to properly delegate the work request based on size and characteristics — for example, a Help Desk ticket, a duplicate request, an error, or a major project.
STATUS	Monitors the outcome of requests through a Dispatched Request Disposition portlet and provides up-to-date summary views of group requests so users can focus on requests as they move through the lifecycles.
LIFECYCLES	Monitors lifecycle status across all requests in the portfolio, provides business case templates, helps manage stage-gate status regarding roles, approvals, documents, and other factors, and supports efficient, accurate estimations for financial planning and scheduling.

FUNCTION	DESCRIPTION	BENEFIT
PROJECT MANAGEMENT	Provides dashboards and analytics for work performance measurement, planning and resource assignment, and the creation of schedules.	Gain enterprise-wide visibility. Identify issues easily, reducing the impact on delivery and reducing overruns. Speed time-to-delivery by ensuring projects are completed on time and on budget.

FEATURE	ADVANTAGE
SCOPING AND ESTIMATING	Uses historical data to accurately gauge resources and time required for future projects, provides a powerful estimating tool with adjustable templates, and includes templates with a list of requirements and milestones.
PLANNING AND RESOURCE ASSIGNMENT	Determines the correct resource for a project, based on background, skill set and abilities, and includes a Resource Request Management tool that allows project managers to request resources as needed, for specific periods of time.
BASELINES	Allows users to store a copy of the planned effort and project schedule to use for comparison and variance reporting as part of an earned value assessment.
CHANGES, RISKS, AND ISSUES	Tracks and manages particular issues to understand the possible impact on schedule and cost; generates an approval cycle for any necessary changes; assigns a specific owner for issues so that person will be responsible for its resolution and documentation.
EFFORT AND PERCENT COMPLETE STATUS	Provides an accurate evaluation of work completed on an on-going basis.
WORK PERFORMANCE MEASUREMENT	Describes progress by means of various work metrics on projects throughout the lifecycle.
PROJECT MANAGER DASHBOARDS AND ANALYTICS	Provides key health and status information related to the project manager's portfolios; configurable, role-based dashboards display of portfolios and information to focus attention by job function; and displays performance information on a variety of portfolio metrics, including earned value and schedule, for use in a balanced scorecard.

FUNCTION	DESCRIPTION	BENEFIT
EASE OF USE	Provides a customizable, user-friendly interface supporting a homeview and email notifications.	Improve performance. Drive adoption. Improve enterprise-wide communication.

FEATURE	ADVANTAGE	
HOMEVIEW	Provides one centralized place to quickly access information and processes related to the user. Enables users to view and respond to notifications, enter time and expenses, review assignments, add projects and tickets, manage customers and contracts, and review and update grants.	
CONTENT MANAGEMENT	Manages content associated with projects, resources, changes, risk, issues, and more; provides a central storage location for content with content management features such as check-in/check-out, search and tracking.	
COLLABORATION	Enables users to participate in discussion groups and message boards, as well as access content related to the portfolio.	
ACTION-ORIENTED DASHBOARDS	Provides quick visual indicators of the health and status of portfolios, and can be configured to individual users to provide quick, high-level summaries of portfolios and projects.	
TREND ANALYSIS	Enables the user to measure the health and performance of portfolios; includes gauges and arrow buttons that represent the current status of selected metrics compared with the status last period; provides easy drill-down to view the underlying metrics and variances.	
EMAIL NOTIFICATIONS	Provides key notifications through targeted, notification-specific emails, and contains key information on the notification as well as an embedded link to access further information and perform the prompted action.	
REVIEW GRANTS	Allows authorized users to drill into details about work and resource grants.	

OPTIONS

FEATURE	DESCRIPTION	BENEFIT
MICROSOFT® PROJECT CONNECTOR	Seamlessly integrates Planview Project Portfolio Management with Microsoft Project, enabling users to "check-in" data from Microsoft Project and then "check-out" data from Planview Project Portfolio Management.	Encourages adoption. Improves accountability. Enhances productivity.
PLANVIEW COMMUNITY POWERED BY EROOM	Provides collaboration via EMC Documentum eRoom, allowing teams to work together closely and efficiently.	Capture and expedite strategic planning decisions. Improve performance. Enhance stakeholder visibility.
BUSINESS OBJECTS™	Leverages enhanced reporting via Business Objects, the industry's leading suite of business intelligence (BI) software.	Track performance. Better understand business drivers. Improve communication.
BMC® REMEDY® BRIDGE	Offers a common interface linking Planview Project Portfolio Management and Remedy's Action Request System, enabling help desk personnel to transfer tickets from their Remedy help desk to their Planview software.	Increase productivity. Speed up response time to help desk requests. Improve customer satisfaction.

PROJECT PORTFOLIO MANAGEMENT OVERVIEW

FUNCTION	DESCRIPTION	BENEFIT
PORTFOLIO MANAGEMENT	Delivers comprehensive information via dashboards on trend analyses, baselines, critical parts, and resource usage.	Make informed, timely decisions about projects. Identify redundant or low-value projects. Prioritize base on customer requests.

FEATURE	ADVANTAGE	
PORTFOLIO MANAGER DASHBOARDS AND ANALYTICS	Provides key health and status information related to the portfolio manager's portfolios; configurable, role-based dashboards display of portfolios and information to focus attention by job function; and displays performance information on a variety of portfolio metrics.	
BASELINES	Allows users to perform comparison and variance reporting as part of an earned value assessment.	

FUNCTION	DESCRIPTION	BENEFIT
RESOURCE MANAGEMENT	Provides dashboards and reporting on staff management, staff assignments, and long-range staff planning.	Assign the right person to the right job. Lower labor costs. Increase productivity and improve utilization.

FEATURE	ADVANTAGE	
STAFF MANAGEMENT	Tracks and manages resource profiles, including rates, start dates, and other factors.	
STAFF DEVELOPMENT	Documents and manages resource profiles, including past projects, roles, titles, skill sets, proficiency levels, and areas of work interest.	
RESOURCE CONFLICTS	Manages and allocates resources according to priority, helping to resolve conflicts in work assignments among projects.	
RESOURCE MANAGER DASHBOARDS AND ANALYTICS	Provides key health and status information related to resource management, such as number of available resources, skill sets available, and current work levels for resources.	
UTILIZATION ANALYSIS	Records and analyzes standard work, project work, and general performance of resources.	
EFFORT ANALYSIS	Records and analyzes the time that resources report against projects, including overtime or slippages.	

FUNCTION	DESCRIPTION	BENEFIT

TIME AND EXPENSES	Automates time and billing, and delivers time and expense reporting.	Improve efficiency by replacing stand-alone time-entry systems.
		Improve regulatory compliance.
		Reduce under-capitalization.

FEATURE	ADVANTAGE
TIME REPORTING	Allows resources to apply time against planned and unplanned efforts as a means of providing status on weekly progress.
EXPENSE REPORTING	Provides the ability to submit expense reports associated with projects as a means of tracking costs against the project.
PERCENT COMPLETE STATUS	Provides an accurate, manual status of work completed on an on-going basis.
TIME AND EXPENSE APPROVAL	Ensures that resources report time and expenses correctly; helps managers track and control expenditures and time spent on projects; allows resources to add explanatory notes on time and expense reports.

MANAGE AND CONTROL PROJECTS ACROSS THE ENTERPRISE:

Learn more about Planview Project Portfolio Management today by visiting www.planview.com/ppm.

PLANVIEW®

About Planview

Since 1989, Planview has been a market leader and trusted partner in software for comprehensive IT management. Our flagship product line, Planview Enterprise, brings the most comprehensive IT management solution to the market, combining adaptive IT management best practices, best of breed resource management and portfolio management software. Planview enables business leaders to integrate the decision-making process to improve alignment of IT resources with business strategies. We serve an active and growing global customer community of over 400 organizations in financial, insurance, healthcare, government and other industries. Planview is privately held and has been profitable for over a decade.

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