BUSINESS PROCESS MANAGER

PLANVIEW®

CLOSE THE GAP BETWEEN PROCESS DESIGN AND ADOPTION WITH END-TO-END PORTFOLIO MANAGEMENT PROCESS MODELING AND MANAGEMENT

DO YOU NEED STARTING POINTS FOR BEST PRACTICES PROCESS MODELING?

DO YOU NEED AN END-TO-END AND ENTERPRISE-WIDE VIEW OF YOUR BUSINESS PROCESSES?

ARE YOU LOOKING TO INCREASE THE PROCESS MATURITY OF YOUR ORGANIZATION?

ARE YOU MEASURING THE EFFECTIVENESS OF YOUR PROCESSES?

The importance of adopting good business processes is now widely accepted as essential to improving organizational efficiency. The reality; however, is that it is difficult to have processes adopted and harder still to measure their value. Your organization's business change initiatives are dependent on the design and maturity of your business processes. The Planview Enterprise Business Process Manager is an integrated component of Planview Enterprise®, introduced to help you increase process adoption and accelerate process maturity to improve your organizational performance and enable more innovation.

The Business Process Manager lets you flexibly model business processes based on business objectives and automate routine process tasks to gain efficiencies. The Business Process Manager provides a single user-friendly view of complex business processes which enables greater process visibility and access, and will in turn, accelerate process adoption. Additionally, you can use the Business Process Manager to measure process effectiveness, driving continuous process improvement.

OPEN PROCESS PLATFORM

Using the open platform of the Business Process Manager, you are able to manage complex business processes with its single end-to-end view. The Business Process Manager allows you to manage a broad range of business processes including custom designed processes and those that leverage industry leading process models such as Planview PRISMS, ITIL, PMBOK, PRINCE2 and CMMI. The Business Process Manager helps you reach process excellence through adoption, compliance and continuous improvement, and helps ensure that your business processes meet your business needs.

Figure 1. Four Components of Process Excellence

The Business Process Manager addresses four primary factors of process excellence to help you achieve process leadership to drive change. Process design, automation, adoption, and measurement are coordinated within the Business Process Manager framework as interrelated components of process management success.

FLEXIBLE PROCESS DESIGN

Your processes can be easily defined, modeled, and modified using the extensive configuration tools and easy to use web-based "drag & drop" process editing tools. Planview Enterprise Business Process Manager will be available pre-loaded with the Planview PRISMS Process Library, an industry-leading IT business management process knowledge base and best practices library. Inside of the Business Process Manager framework, PRISMS is an interactive tool for defining, comparing, and maturing process in 7 major areas: strategic planning; capacity management; demand management; funding and budgeting; work and resource management; cost management and benefit realization.

In addition to Planview PRISMS, the Business Process Manager can model and bring visibility and automation to proprietary in-house best practices, or industry standard practices such as ITIL, PMBOK and PRINCE2.

Planview Enterprise

The Business Process Manager is an integrated component of Planview Enterprise, a market-leading portfolio management solution. Portfolio management helps you optimize your business by balancing Strategy against scarce resources – People and Money. Other components of Planview Enterprise include Enterprise Portfolio Management (EPM) for strategic planning, Project Portfolio Management (PPM) for managing projects and resources, and Service Portfolio Management (SPM) for managing the total cost of business service delivery. As an open business process management platform, the Business Process Manager extends business process management capabilities of the Planview solution enterprise-wide.
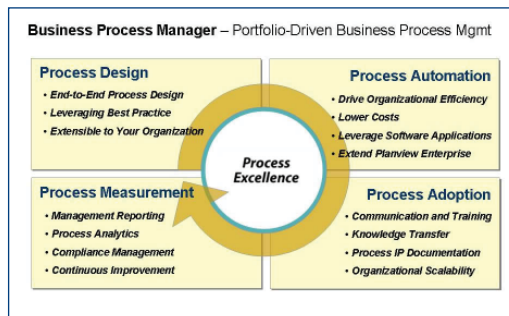
Why use Planview Enterprise Business Process Manager?

- Increase portfolio management process user adoption
- Realize operational efficiencies with single view of enterprise-wide business processes
- Improve process maturity and compliance with business process automation
- Measure process performance and adoption to continually improve processes

OPERATIONAL EFFICIENCY THROUGH PROCESS AUTOMATION

Business Process Manager is extensible to enterprise-wide business processes, creating a single comprehensive view of business process across applications. Operational efficiencies are realized through its aggregate view and its capability to automate routine tasks using existing software applications. The automation provides a guide to the phases, gate reviews and key deliverables associated with a process. An example of automation of a budgeting process is shown in Figure 2.

PORTFOLIO MANAGEMENT PROCESS ADOPTION

Business process adoption is typically challenging because processes are often perceived as being hard to find and use, adding to the workload, or not applicable. A single and accessible user-interface to model and manage processes, the Business Process Manager makes organizational processes available to all stakeholders. It becomes a visible guide to the work that needs to be done and the work that has already been done. Business processes change from being static documents to become active guides for day-to-day work to improve the consistency of outcomes. Stakeholders can link

Figure 2. Automation of a Budgeting Process

and access pages throughout the rest of Planview Enterprise and other third-party applications using the Business Process Manager. Planview Enterprise Business Process Manager accelerates process adoption by making processes more visible and accessible, and by allowing people to do what they need to do within the appropriate context without forcing unnecessary work.
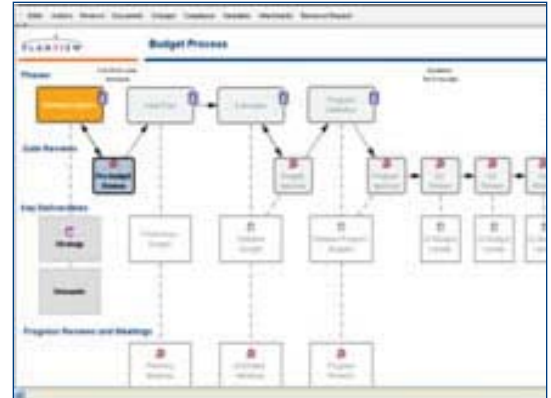
PROCESS MEASUREMENT LEADS TO CONTINUOUS IMPROVEMENT

Processes are implemented to improve efficiency and productivity; and yet, all too often, their effectiveness is not measured. Without measuring the processes efficacy, the actual value of the processes cannot be assessed. The Business Process Manager enables you to track the level of compliance to processes and report information about adoption, this includes which processes are being used and which are not and if not why not. In addition, the Business Process Manager monitors review decisions. The reviews provide key indicators of the efficacy of organizational processes; Business Process Manager monitors what decisions were made by whom and when, as well as the justifications for making the decisions. You can model your review and decision processes directly in the Business Process Manager. Reviews are maintained complete with agendas, meeting minutes, and actions.

REDUCING THE COSTS OF PROCESS IMPLEMENTATION

The significant cost of adopting best practice processes can be substantially reduced by the adoption of the Business Process Manager. Stakeholder training costs are defrayed through the visibility and guidance of the Business Process Manager on the desktop. The costs of compliance are decreased as routine process tasks become automated in the Business Process Manager framework. There is no longer the expense of tracking process compliance as this function is a feature of the Business Process Manager. Additionally, a complete audit trail is kept of who changed what and when. This substantially reduces the cost of both internal and external audits. This is particularly valuable in formally certified processes like CMMI and ISO 9000.

The Planview Enterprise Business Process Manager provides end-to-end process modeling and management that closes the gap between business process design and its adoption. Providing a single point of management with extensive functionality, the Business Process Manager addresses business process design, automation, measurement, and adoption to help you achieve process excellence to drive effective and timely business change.

BUSINESS PROCESS MANAGER OVERVIEW

FUNCTION	DESCRIPTION	BENEFIT
PROCESS DESIGN	Processes can be easily defined, modeled and modified.	Process may be quickly designed and built using the extensive configuration tools provided.

FEATURE	ADVANTAGE
PROCESS EDITOR	Allows processes to be easily edited using a graphical drag and drop editor.
COMPONENT EDITOR	Forms, reports and data may be modeled so that organization specific applications can be easily implemented. This allows BPM to be used to build extended applications supporting broad business requirements.
TEMPLATES	Standard templates can be built to reflect corporate standards. For example standard gate reviews may be defined.
EVENTS	Users may be notified when certain events occur (e.g. an email may be sent when a review is 5 days overdue). Issues that are not resolved in a timely manner may be escalated.

FUNCTION	DESCRIPTION	BENEFIT
PROCESS MODELING	A very wide range of processes may be modeled from existing corporate processes to industry best practice processes.	The fast configuration tools may be employed to implement either familiar corporate processes or industry standard processes.

FEATURE	ADVANTAGE
PLANVIEW PRISMS PROCESS LIBRARY	Planview best practice processes can be activated using BPM.
STANDARD PROCESSES AND METHODOLOGIES	Standard processes and methodologies such as PMBOK, PRINCE2, CMMI, ITIL and Six Sigma can be easily modeled and represented. The review and compliance model in BPM is ideal for representing these types of processes.
CORPORATE PROCESSES	An organization's existing processes may be readily modeled and activated. The flexible stylization allows processes to be represented as they are in the corporate manuals thus encouraging familiarity.

FUNCTION	DESCRIPTION	BENEFIT
PROCESS ADOPTION	The modeled processes can be made available to all stakeholders. The process is very visible providing a guide to what work needs to be done and to what work has already been done.	Improve business efficiency by facilitating process adoption. Improve process accessibility and visibility. Improve the consistency of outcomes. Reduce process adoption costs.

FEATURE	ADVANTAGE
VISIBLE PROCESSES	Reduce adoption and training costs by taking the process out of manuals and making them into an active guide to day to day work. Increase the level of adoption and acceptance by making the process readily accessible.
GUIDES AND PROCEDURES	Improve the understanding of what a particular process is trying to achieve. Provide easy access to the often ignored process documentation.
REVIEWS	Track through a review process that all work has been appropriately performed. Track decisions using a gate review process. Make sure actions are distributed, don't get forgotten and are acted upon.
APPLICATION LINKAGE	Link and access pages throughout the rest of Planview Enterprise from the process. Link and access pages from external 3rd party applications from the process.
LINKED DOCUMENTS	Any document (e.g. Word, Excel, images) can be directly linked to the process for immediate access. Linked documents may be managed (versioned and distributed).

BUSINESS PROCESS MANAGER OVERVIEW

FUNCTION	DESCRIPTION	BENEFIT
PROCESS MEASUREMENT	Various aspects of the process usage can be measured.	The extent to which a process is being utilized can only be determined if it measured. The value of the process can be determined through quantitative analysis.

FEATURE	ADVANTAGE
COMPLIANCE	Track the level of process adoption. Increase accountability through tracking the level of process compliance.
VERSIONING AND HISTORY	A complete history is maintained for analysis, accountability and audit. Any previous version of data held within the system may be viewed as it appeared at any time in the past. A complete history of who made what changes and when is maintained.
REPORTING	Tabular reports can be used for analysis to gain insight into how the processes are being utilized. This includes data on how long processes remain in what states. Tabular reports may be exported, sorted, reformatted and queried.
TIME SERIES CHARTING	How process usage changes over time is essential to understanding trends in process adoption. For example, is process adoption increasing or decreasing over time. Because all data is fully versioned any data in the system can be viewed as a time series.
EMAIL	Information can easily be distributed to others via email. Most pages in BPM can be sent as email. From an email a user may log back into the relevant page in BPM. Email may be integrated through Microsoft Outlook.
EXPORT	Export any data within the system for further analysis. Data can be exported in HTML or XML. XML data may also be transformed into other formats including csv (comma separated values) for use in other applications such as Excel.

FUNCTION	DESCRIPTION	BENEFIT
CONTINUOUS PROCESS IMPROVEMENT	Dynamically update processes based on analysis of metrics.	Improve organizational productivity and competitiveness

FEATURE	ADVANTAGE
UPDATE PROCESSES	As processes are modified all applications using that process may be dynamically updated. Processes, Components, Templates and Events can simply be updated using the same configuration tools as used to initial design and implement the processes.
AUDITING	A complete audit trial is kept of who changed what and when. This substantially reduces the cost of both internal and external audits. This is particularly valuable in formally certified processes like CMMI and ISO 9000. It substantially reduces the cost of maintaining compliance with these processes.

Since 1989, Planview has been a market leader and trusted partner in providing comprehensive portfolio management solutions. Planview Enterprise®, the company's leading performance management platform, combines project and portfolio management software with adaptive best practices, Planview PRISMS®, to provide unprecedented visibility into total IT spending. By integrating the business process management of strategies, services, and projects within a single, Web-based solution, Planview empowers organizations to achieve greater levels of control over their ever-changing environment by dynamically managing money, resources, and capacities. Industry leaders such as Citigroup, Reuters, EDF and the US Department of Transportation, partner with Planview to achieve their strategic business goals. Headquartered in Austin Texas, with offices across the U.S., Europe and Asia-Pacific, Planview supports more than 500 customers in virtually every industry. Planview is privately held and has been profitable for over a decade.

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