

# PLANVIEW Project WIZARD

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# Implement Strategies Through Your Portfolios *New in 7.3*

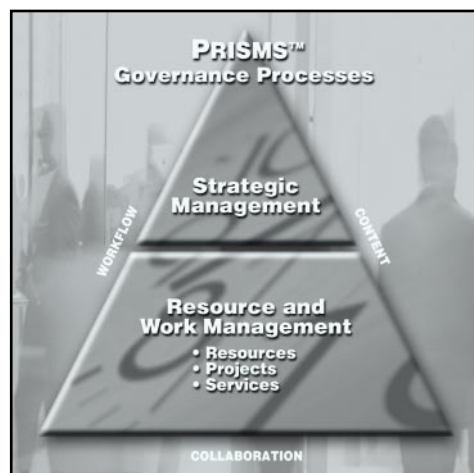
PlanView, already a world leader in providing enterprise work and resource management software and process solutions, continues to redefine the marketplace with the release of PlanView Portfolio Management 7.3. Featuring new strategic management capabilities, Version 7.3 allows organizations to determine which potential projects align with business goals through detailed investment analysis. When coupled with the current work and resource management capabilities, PlanView Portfolio Management 7.3 offers a comprehensive solution that enables organizations to thoroughly manage and drive opportunities from idea to asset.

### Manage Your Ideas

Executive management is often tasked with setting the vision and goals for an organization. Strategic Management is the process of determining what workload supports these executive initiatives. PlanView 7.3 aids in clarifying which opportunities to pursue by providing real-time decision-making tools, process guides and performance indices which provide user-definable criteria like ROI data, estimated resource usage and budget restraints. This data is ultimately analyzed and utilized to ensure that organizations invest wisely in the most productive opportunities.

### Removing subjectivity

A common problem that affects decision-making in the strategic analysis phases is the introduction of bias and subjectivity to the process. PlanView addresses this issue and answers with scripted



dialogues embedded in PRISMS governance processes. Essentially, the scripted dialogues help a project planner or investment owner categorize or define an opportunity outside the bounds of the physical scope of work. A series of automated questions and prompts helps the user define and analyze attributes like risk and business alignment. The key is that the same questions and

requirements are consistently addressed across all opportunities so they are being scored and measured consistently in the analysis phase. By using these consistent processes and scripted dialogues, subjectivity and politics can be essentially eliminated in the planning stages.

### Manage Your Work

Once executive management dictates which opportunities are to be put into production, project and resource managers are required to plan and staff them. As investment opportunities are translated into projects through PlanView's more traditional work management functionality, detailed project scheduling and resource capacity analyses are completed to ensure that the project can be delivered on time and on budget. A work manager needs visibility and reporting capabilities to catch the inevitable project schedule and cost deviations so changes can be made accordingly. Through portal technology, PlanView project and resource portfolios are set up to offer real-time updates into project budget, schedule and costing risks, alerting managers when actions need to be taken.

# Governance & PRISMS

## PlanView improves productivity by automating your processes.

PRISMS is a set of organizational governance processes deeply integrated and embedded with PlanView's world-class software for portfolio, project and resource management. Designed to improve organizational performance and productivity, PRISMS can actively and efficiently automate the day-to-day tasks of managers by establishing lifecycle steps and roles, dictating approval protocol for documents, routing said documents and defining a project plan by use of mentoring templates.

### With PRISMS, improve the way your organization:

- Defines project and investment lifecycles
- Defines authorities and responsibilities through lifecycle roles
- Manages investment and project workflow using stage/gates
- Provides content documents within the lifecycle
- Provides and facilitates investment and project collaboration

The PRISMS deliverables include eleven project models, a pre-populated PlanView database with appropriate attributes to categorize investments, projects, service agreements and resources, a process map, a process guide and quick reference cards. Additionally, domain-specific project models are planned for PRISMS, as well as integration of premium third-party content and processes as optional products.

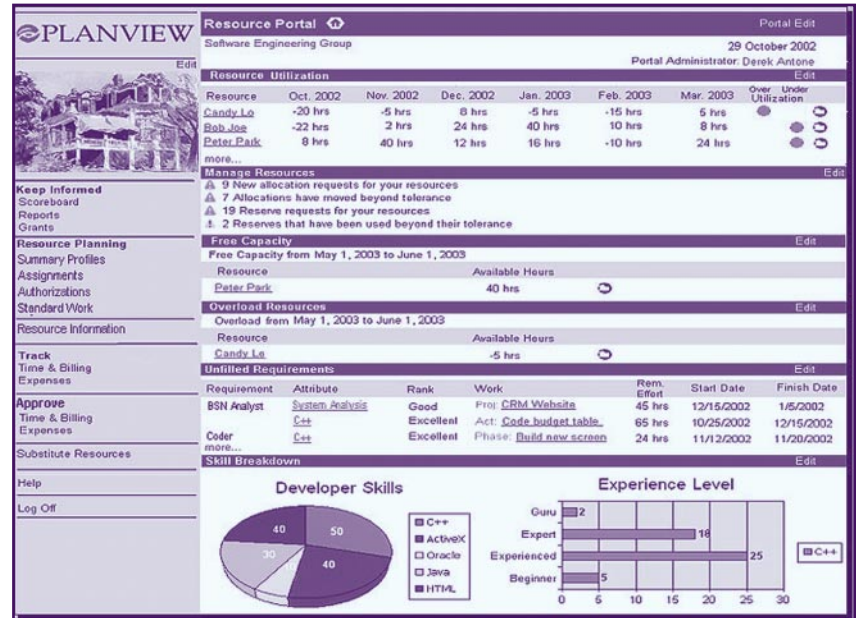
PlanView has put into PRISMS more than fourteen years of experience in delivering successful projects. PRISMS is delivered via PlanView Software, enabled by PlanView web portals and acts as a quick-start to building and maturing organizational governance processes.

PRISMS can be implemented immediately or tailored to the unique needs of the organization.

# The Right People

## Resource Management

Optimize the use of your resource capacity to do more with less



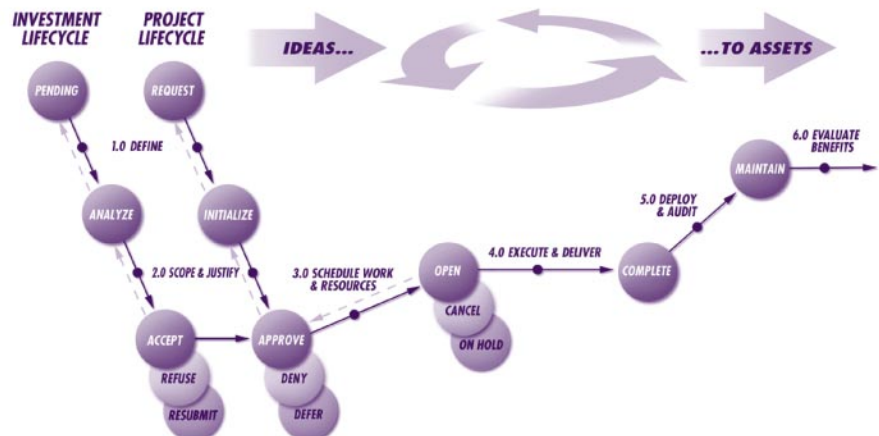
PlanView is widely acknowledged as one of the richest resource management solutions available. Our newest release offers additional tools to manage to the capacity of the organization—often critical to success in matrix organizations. Organizations can now:

- View staff and contractor metrics, analytics, as well as real-time usage and capacity information via a thin/zero-client PlanView Resource Portal.
- Quickly reconfigure and edit the Resource Portal across multiple attributes, supporting easier capacity planning, updating and approving.
- Empower resource managers with graphical resource profiles viewed as summary profiles that drill down to individual resources. View graphically or numerically, with configurable timescales and assignment types.
- Notify Resource Managers of new resource and unfulfilled requirements via the portal to find work for resources on the bench.
- Build and maintain information about resources, including skills inventories, areas of interest and other characteristics, also via a new thin browser interface.
- Track and report labor to payroll codes, using the new configurable payroll structure with PlanView timesheets, to meet some of the most stringent time collection regulations in the U.S. and EEC. Includes a new payroll summary approval view.

## Workflow Diagram

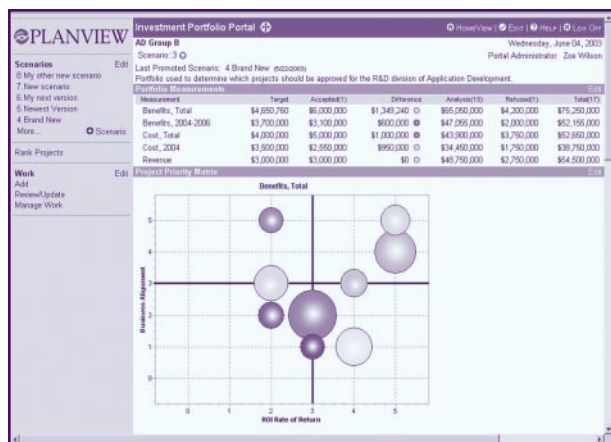
PRISMS is based on a standard set of Stages & Gates that define the flow of the investment from the Idea to an Asset. A **Stage** is the execution of a set of lifecycle steps that consume resources to accomplish goals. A group of lifecycle steps will lead to a decision point, which is considered a **Gate**. Each project model has stages and gates.

The stage/gates assure a consistent method of analyzing the investment opportunities to score, rank and prioritize the opportunities and then use a disciplined process to monitor progress.



## Investment Analysis

Invest your time & resources in the best projects and products



PlanView Portfolio Management Version 7.3 now offers software and processes decision support at the go/no-go phase of choosing and initiating the right work, and then managing the organization's investments. PlanView's investment analysis helps score, prioritize and rank new project candidates. Now, organizations can:

- Define project portfolios around product, line of business, customer, investment type, funding source and more.
- Facilitate investment decision-making with access to real-time information. Track on-going performance with real-time schedule, budget, change, risk and resource usage updates and variance reports.
- Set portfolio targets for the system to notify users when met or overrun
- Define a new PlanView role, the Investment Owner, who is responsible for the performance of investment decisions; authority can stop with the investment decision or drill down to review and manage execution steps.
- Model and stimulate multiple possible investment scenarios, easily, with an audit trail for tracking, comparisons, portfolio trend analysis, etc.
- Guide how their clients or team set attributes, estimate benefits, etc. with a tailorable PlanView Wizard.

## PlanView Celebrates a Decade of Growth and Profitability

More than 20 percent Revenue Growth in 2002

PlanView closed another successful year amidst a slow economy and reduced IT spending across the industry. Results for 2002 indicate at least 20 percent revenue growth derived from more than 70 new deals, with about half of those from existing customers who added new licenses in 2002 to their proven implementations. This is the tenth year of consistent profitability and increasing revenue for PlanView.

In a time when its competitors were retrenching, PlanView also invested in its European growth by opening three new offices there. PlanView expanded into France, Holland and into Milan with a second Italian office.

"I appreciate the continued faith that our new and existing customers have placed in us," said Patrick Durbin, PlanView CEO. "Our revenue growth and profitability confirms the steady, conservative business approach that has made us a viable partner for these many years."

## News & Reviews

Hear what expert analysts and industry publications have to say about PlanView.

Giga International Group, in their report "Processes and Tools: The Nuts and Bolts of Project Portfolio Management," gives PlanView 'Strong Functionality' across all categories of comparison, the only PPM vendor to receive a perfect score.

Meta Group identifies PlanView as a leader in the Project Portfolio Management field. "Leaders have strong and coordinated capabilities, enabling users to more effectively evaluate and analyze their project portfolios."

PlanView customer Premera BC/BS extols the benefit of implementing PlanView in the *Insurance & Technology* magazine article "Worth the Effort: Tackling the New Project Management." Premera VP, Michael Heuer explains, "In addition to gaining awareness of the entire project portfolio, PlanView has been accumulating project history since the configuration and training were completed. When we're estimating a project now, we can do it on the basis of the project 'actuals' of the past 15 months."

These and more are all available for viewing on the PlanView website at [www.planview.com](http://www.planview.com).

## PRTM & PlanView

In concert with the recent launch of our new software and process release, PlanView has formed a partnership with strategic consulting firm PRTM. The partnership lets PlanView draw on PRTM's expertise and experience in consulting with companies in the Life Sciences industry and product development groups to further augment PlanView's presence in those fields. Leveraging PRTM's knowledge allows PlanView to effectively offer solutions by automating the process and methodology expertise that PRTM offers.

PRTM also participated in the Spring Seminar Series PlanView took around the country earlier this year. The seminars focused on the new Resource Management and Investment Analysis functionalities available in PlanView v7.3. PRTM highlighted the approaches that successful companies use to manage their product portfolios, and how they achieve greater throughput, return, and strategic alignment through IT-enabled project portfolio management. For more info on PRTM, visit their website at [www.prtm.com/services](http://www.prtm.com/services)

# Look for us at these Professional Events!

PlanView Regional Managers will be on-hand at these events ready to demonstrate to you why we're the world leader in project, portfolio and resource management. Visit our website at [www.planview.com](http://www.planview.com) for links to the event websites.

When	What	Where
Gartner Summit on Proj Portfolio Mgmt	San Francisco, CA	July 13-15
DCI Enterprise Project Mgmt	New York, NY	Aug 26-28
PMI 2003	Baltimore, MD	Sept. 21-23
PlanView User Group Conference USA	Austin, TX	Sept. 28-Oct. 3
ProjectWorld MidWest	Chicago, IL	Oct. 1-2
PDMA (Product Development)	Boston, MA	Oct. 6-8
Gartner Fall ITXpo	Orlando, FL	Oct. 21-23
Project World West	Los Angeles, CA	Nov. 3-6

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PlanView Inc.  
 8300 North Mopac #100  
 Austin, TX 78759  
 Tel: 512 346-8600  
 Fax: 512 346-9180  
[www.planview.com](http://www.planview.com)

# PlanView Welcomes New Customers!

- Borders Group, Inc., a publicly held Fortune 500 Company with sales of \$3.4 billion, operates more than 1200 Borders and Waldenbooks stores worldwide. Borders will implement PlanView for project and product management, and for managing to its resource capacity.
- Delta Airlines, based in Atlanta, Georgia, provides air transportation for passengers and freight throughout the United States and around the world. Delta will be using PlanView to help them manage the work and skills in their information technology group to increase productivity and to cut costs.
- National Grid provides low-cost, reliable electricity delivery and responsive customer service to approximately 3.2 million residential, commercial, industrial, and municipal customers in upstate New York, Massachusetts, Rhode Island, and New Hampshire. National Grid will use PlanView for resource forecasting and allocations, and reporting and monitoring of projects along with resources.
- Staples, Inc. is an \$11.6 billion retailer of office supplies, business services, furniture and technology to consumers and businesses from home-based businesses to Fortune 500 companies in North America and throughout Europe. Staples will use PlanView to help them manage the work and skills in their IT group.
- Sysco Corporation, out of Houston, has sales and service relationships with more than 415,000 customers and remains committed to helping them succeed in the foodservice industry and satisfy consumers' appetites. PlanView will help Sysco implement and automate new business processes for IT and construction projects in their new Project Management Office.
- The University of Massachusetts Medical School's (UMMS) educational mission stems from its founding in 1962 to provide affordable, high-quality medical education to qualified residents of the Commonwealth of Massachusetts. UMMS will use PlanView software to enable their IT department to track resource usage, time spent on projects and reporting of projects and resources.

## Fax for More Info!

Just photocopy, fill in the blanks below, and fax to 512 498-2330 for more information on PlanView.

Name \_\_\_\_\_  
 Title \_\_\_\_\_  
 Company \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_  
 Zip \_\_\_\_\_ Tel \_\_\_\_\_  
 Email \_\_\_\_\_  
 # of Employees to Manage \_\_\_\_\_  
 Current Scheduling Tool: \_\_\_\_\_

- Send a Free CD Demo --Including Portfolio Management Webcast
- Send the Project Models Brief
- Send the PRISMS Processes Brief
- Call me to discuss my project management needs
- Please remove me from your mailing list