

# PlanView Tools & Processes via Web Software

Is your organization  
**Planning & Executing  
the Right Strategies**  
in your  
project portfolio  
and deploying  
resources wisely?



*Investment Owner:*

"Any idea of our exposure  
if we start this project?"

*Resource Manager:*

"I need at least rough-cut estimates  
early to ensure the right skills  
will be available."

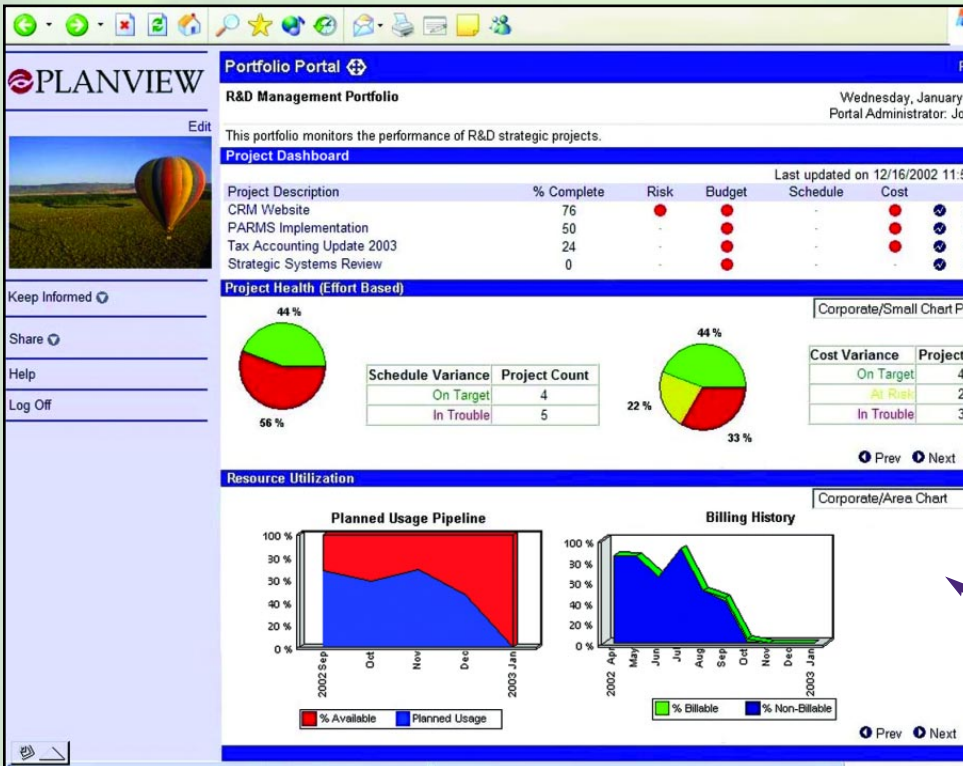
**Get control of costs,  
manage risks,  
and link strategies & execution.**



# PlanView gives you control of the Big Picture...

...And you view the information you need in a dynamic, tailored, web-based portal. In PlanView, portfolios are groupings of work, resources and investments that you control. Your portfolio might be a program of projects, all the work for a given customer, projects supporting a strategic initiative, an investment opportunity – whatever you define. You can then select the information and measurements that you need to manage and control each portfolio.

Get the Big Picture in PlanView's performance portfolio portal that gives you real-time, high-level data about your projects, service work, resources and investments. Some key metrics are shown in the example. You can decide which measurements, what order, their size and more. With PlanView's new embedded business intelligence in the portal, you can even build your own measurements and have them instantly available to whomever you authorize.



# PlanView Portfolio Performance Metrics

- Embedded business intelligence — you select what information to display and when, in many numerical and graphic formats.
- Project priority matrix — a bubble chart with X, Y, and Z axes that you set and control; click on a bubble to drill down for info on that project.
- Resource skill chart — quickly evaluate the skills and proficiencies of your resources or role mix.
- Project dashboard — a combination graphics/text table of key metrics to review on each project, with links to a project portal, Gantt chart, content.
- Stage/gate summary — a quick view of the progress of a project by its gates (decision points) and stages (groupings of lifecycle steps).
- Notifications — your personal alerts, notifications of attention needed on a project lifecycle step, changes in status of matrixed resources, etc.

—And many more possibilities, often displayable with one click!

## Project Dashboard

You decide the key measurements you want and how they're sorted. Click on icons at far right to access Gantt chart, content, and the project collaboration portal.

## Project Health

Project performance viewed as earned-value standards. Drill down for more detail.

## Portfolio Risks

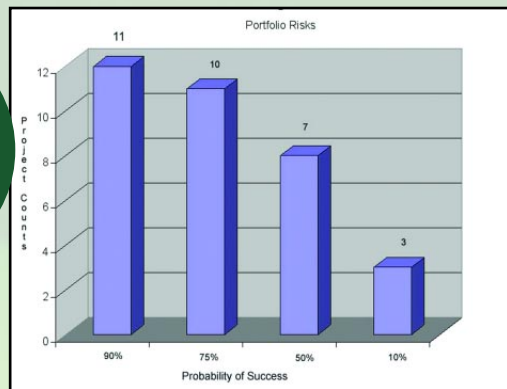
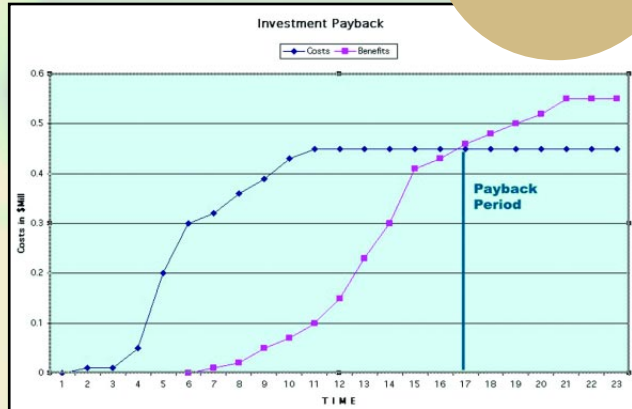
Group your projects by the risk inherent in the project; some risk is necessary to keep a dynamic portfolio.

## Resource Utilization

View availability of the skills or roles in your organization you need for your work.

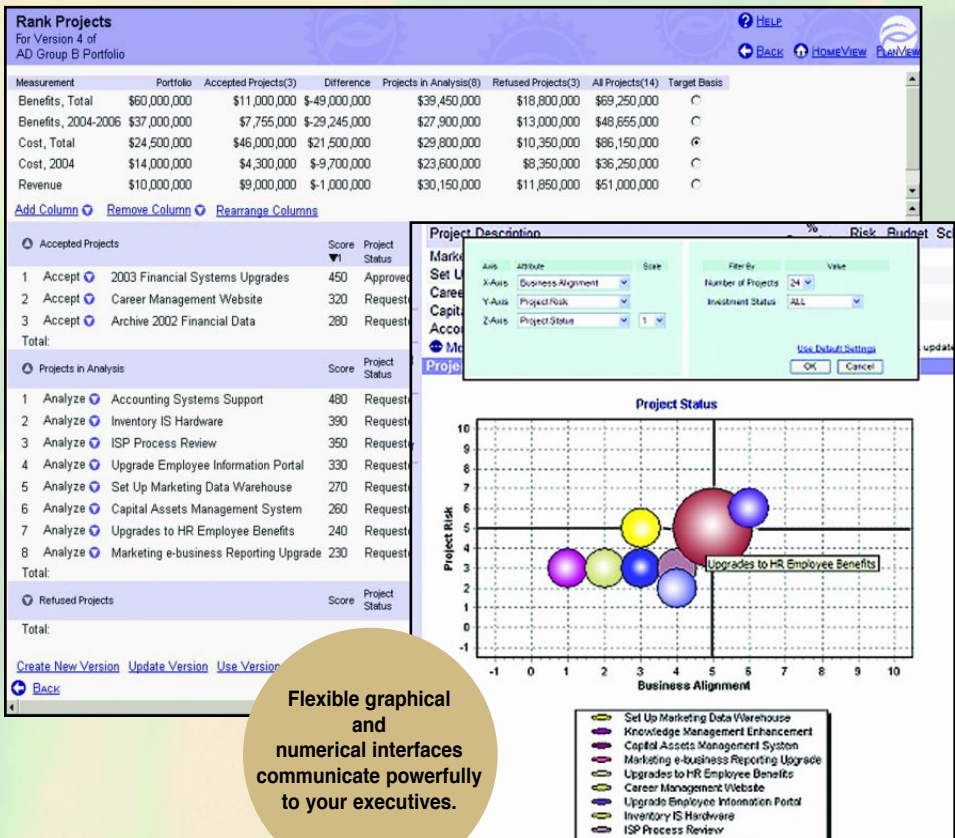
## Investment Payback

Time phase your costs and benefits to define payback by project or across the portfolio.



# Are You Doing the Right Work?

Strategic management is aligning your projects, service and resource usage with your business goals. PlanView's investment portfolio portal is your access to investment information. The investment target basis includes all of the options of the performance portal, plus direct links to graphical and tabular investment information. With PlanView, your strategic board can model investment opportunities to rank, score, prioritize and pick the right work.



Flexible graphical and numerical interfaces communicate powerfully to your executives.

Learn More about PlanView Portfolio Management—  
Download papers & request free CD demo at  
[www.planview.com](http://www.planview.com)  
Free Webcasts & Seminars!



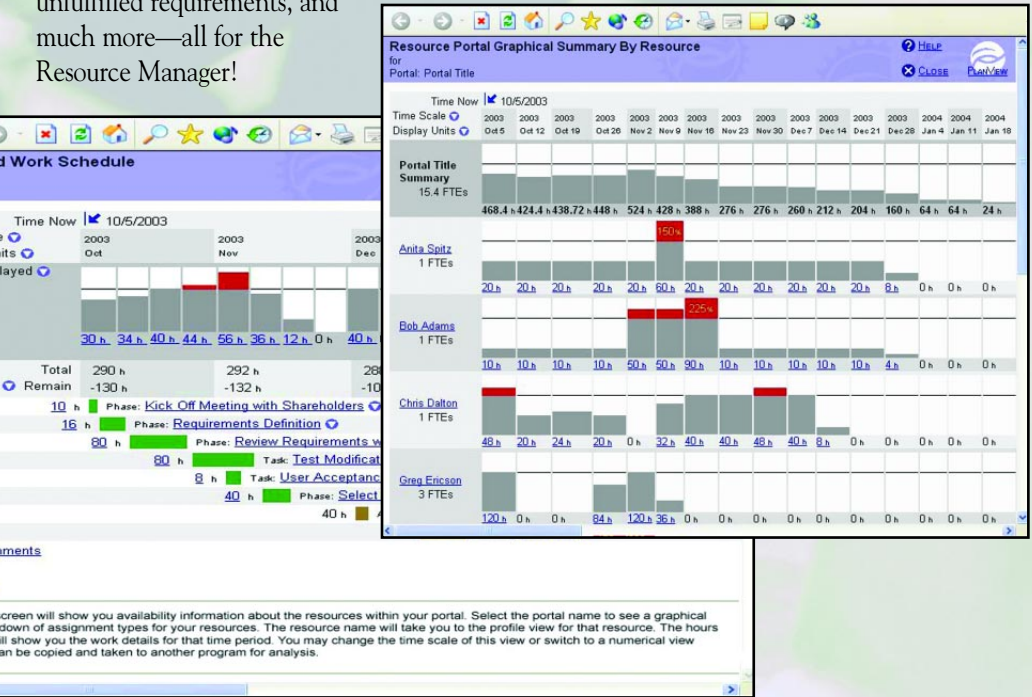
## Your Governance Model Drives Strategy

Governance is how your executives communicate their authority and delegate responsibilities throughout the organization. PlanView integrates mature, repeatable governance processes into web software for strategic management and for resource & work management. You define, scope and prioritize investment opportunities to pick the right work. Then you plan and manage how resources are assigned to be most effective at getting projects and service work done.

PlanView offers mature, ready to use governance models through the PRISMS real-time business processes. PRISMS uses the PlanView Wizard to route investment opportunities to the right governance model and project model. This then provides your organization with just-in-time mentoring on: lifecycle roles, investment lifecycle, project framework, content & documents, cost & benefit analysis accounts, a collaboration portal, and resource requirements. You manage risks better, reduce redundant efforts, and ensure the right people are doing the right work.

# Use Your Resources to Capacity

Using only a web browser, you can review and assign staff directly from their usage profile. You can drill down to more information and display the results as graphics or text. The profiles are accessed from a PlanView Resource Portal that provides real-time staff and contractor information, includes alerts on over utilization, under utilization, unfulfilled requirements, and much more—all for the Resource Manager!



## About PlanView



PlanView is a world leader in management tools and techniques to control costs and risks in Information Technology and product development groups around the globe. With 10 straight years of profitability and growing revenue, PlanView is also your best partner for improving productivity and optimizing performance.

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