

# Software Brochure

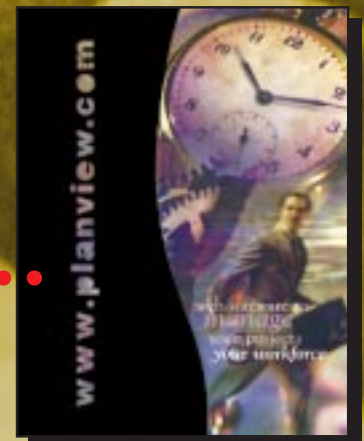
## the “nuts & bolts”

PlanView Software  
Version 6.0

### Table of Contents

Architecture Overview.....	2
Roles Defined .....	3
FeatureSets .....	4
Project Management .....	4
Resource Management.....	6
Time & Expense Accounting .....	7
<i>Note: The features in each section above build upon features from the previous sections...</i>	
Strategic Management.....	8
Knowledge Management .....	8
Using Information (Reporting) .....	9
Administrating PlanView .....	9
Technology .....	10
Professional Services.....	11
Product Support .....	11
Company Info .....	12

*For an overview of PlanView's web software to manage your projects and your workforce, refer to our 12-page v6.0 capabilities brochure*



# PlanView Software Architecture

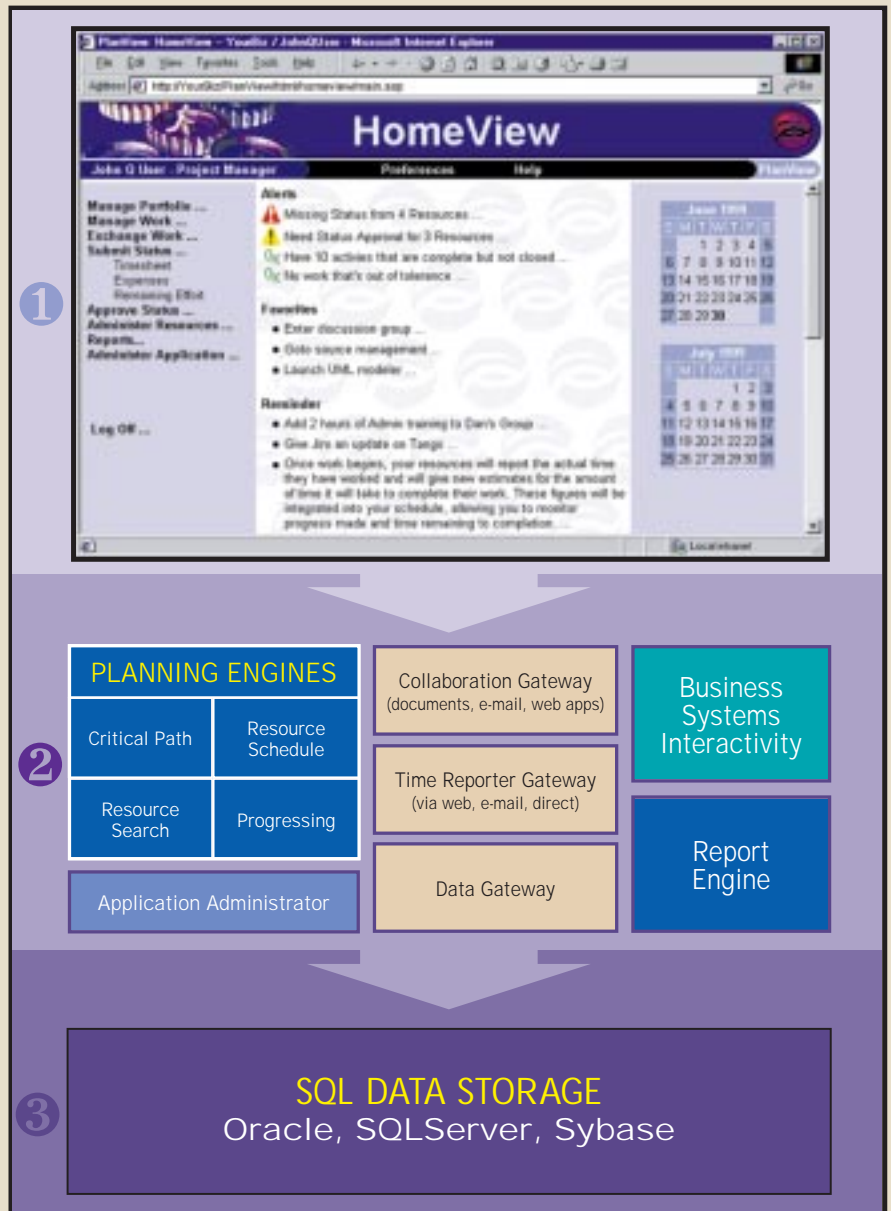
PlanView, Inc. offers PlanView Software for professional project-driven organizations. PlanView's over-200 customers includes Information Systems, Professional Services groups, engineers, product developers, R&D and more. The current Version 6.0 released in 1999 is 100% web software that has evolved from PlanView's ten-year history of enterprise-level project and resource management. PlanView is implemented as an Intranet or Extranet, and has appropriate security for either choice.

## 1 Personalized Web Portal

PlanView is delivered by user role. Users access the system through a single login that links them to their HomeView™ portal. HomeView then dynamically builds the FeatureSets™, alerts, favorites and remarks appropriate to their individualized needs, and displays only the information from the central repository to which they are granted. Each organization can customize their roles within the PlanView framework.

## 2 Business Logic on Middle Tiers

Web servers link the browser client and enterprise services on application servers. The server-centric business applications enhance collaboration and decision-making using the web. The Planning Engines calculate critical path, perform resource searches, balance resource schedules and progress the schedules based on expense and project-status information reported by the contributor staff. The gateways manage collaboration and link roles in batch or in real-time to the central repository. The Report Engine prepares information for producing output. Business interactivity shares PlanView data with other software systems. An Application Administrator is included.



## 3 Repository Based System

All work and workforce information is stored in a central repository to be shared across the enterprise. PlanView's central repository runs on a standard SQL database—you can choose from Oracle, Microsoft SQLServer or Sybase. Administrators and technical users of the PlanView Application Programming Interface (API) have direct access to the repository. Other roles access the repository through PlanView's powerful and efficient middle-tier gateways and business applications.

# Organizational Roles

These roles are tailored to each customer

## MANAGER

Manage Work...  
Exchange Work...  
Administer Resources...  
Submit Status...  
Approve Status...  
Reporting...

A manager is responsible for planning activities within projects and service requests. They manage and control work and the workforce. Some typical manager roles are:

A project manager is responsible for planning activities within projects and service requests.

They may use a template to initialize a plan, estimate effort and duration to customize the template, add or confirm the roles/skills needed on the project, add any constraint dates, calculate the initial schedule, and may link Microsoft Project files with PlanView's central repository. The project manager may also search for the best resources for the project and "request" they be assigned. They can assign work to staff, approve status and attach unstructured information. They can track issues, changes and risks by activity.



Project Manager

A resource manager administrates the staff by assuring that standard activities are in the schedules. They keep the staff's skills and other attributes up to date. They can attach unstructured information to a staff record, such as a resume or development/training plan, and also process a resource request from a work or project manager to search for the right skills to meet project and service needs, allocate staff to project activities and approve time and expense reports.



Resource Manager

## CONTRIBUTOR (Staff)

Both real and "virtual" staff members can be empowered with PlanView— for instance subcontractors, or clients working on projects. A standard contributor submits status on time worked, expenses and remaining effort. They can add service requests where authorized. They can search their assigned work to report time to any activities within their authority. They can report time to standard activities. In addition, enhanced versions of the contributor role include:



Contributor

Submit Status...  
Reporting...

Manage Portfolio...  
Administer Resources...  
Submit Status...  
Approve Status...  
Reporting...



Deluxe Contributor



Supervising Contributor

A supervising contributor can approve time & expenses reported by their group. A deluxe contributor can review their personal portfolio of work, and add projects and service requests. They can accept or decline work assignments. They self-administer their standard activities, skills and other attributes. They submit status on time worked, expenses and remaining effort. They can attach unstructured work products (such as documents) to their activities and add unstructured information (such as a professional resume) to their staff record.

## STAKEHOLDER

A stakeholder is typically a senior manager, business developer, client or other involved party. They can initialize new work, define budget information, change the status of their work and produce reports. They can attach unstructured information such as documents or drawings to projects and activities within projects. They can authorize specific parts of the workforce to report time to their projects or service requests.



Manage Portfolio...  
Reporting...

## ADMINISTRATOR

The application administrator sets up the software tables and updates them as required. They add new users, help users manage their passwords and authorizations and help in data maintenance. If there are interfaces between the various business software systems, the administrator will typically be the facilitator for exchanging data. As part of the project management team reporting their time, they also status work, expenses and remaining effort.



Administer Application...  
Submit Status...  
Reporting...

PlanView's FeatureSets	Stakeholder	Resource Manager	Project Manager	Deluxe Contributor	Contributor	Applic. Administrator
<b>Manage Portfolio</b>						
Add Work	●		●	●		
Add Service Request	●	●	●	●		
Change Status	●	●	●			
<b>Manage Work</b>						
Use Critical Path			◆			
Use Resource Search		◆	◆			
Allocate Resource		◆	◆			
Use Resource Scheduler		◆	◆			
Administer Templates		◆	◆			
<b>Exchange Work</b>			●			
<b>Administer Resources</b>						
Add Standard Activities		●	●	●		
Define Resource Detail		●	●	●		
View Cost Rates		●	●			●
Change Cost Rates		●	●			●
<b>Submit Status</b>						
Report Time		●	●	●	●	●
Report Expenses		●	●	●	●	●
<b>Approve Status</b>						
Approve Time		●	●			
Approve Expenses		●	●			
<b>Reporting</b>						
Access Report Formats	●	●	●	●	●	●
Create New Reports		●	●			●
<b>Administer Application</b>						●

FeatureSets and Roles can be tailored for each customer as part of the PlanView implementation process.

This chart shows what roles in the organization will typically use each feature.

● = Accesses a gateway

◆ = Accesses a planning engine

# Project Management

GENERAL

- Supports full traditional project management concepts through our powerful server-side planning engines: Critical Path, Resource Search, Resource Scheduling and Work Progressing. Each engine automates various collaboration and communications features.
- Full project management functionality available from within common web browsers on an Intranet or Extranet with server-centric business logic that supports immediate collaboration between offices and staff anywhere in the world.
- Project scheduling takes into account true work capacity of your resources, so project schedules reflect reality. Service, maintenance, and standard activities— such as vacation and training— are considered in the workload when planning work.
- The central repository set-up lets all project managers make decisions from common

information. Collaborative engines inform the appropriate managers of changes in schedules and in resource availability.

- Grants define the user's access to work and resources in read/write and read-only format.
- Filtering, sorting and other portfolio management features let users choose level of detail to display. View and sort by work or by resources. Option to exclude various data when filtering. Filter on primary WBS, primary OBS, all standard attributes, and user-defined alternate structures. Multiple criteria supported, uses "and/or" Boolean logic, and filters can be saved.
- Managers can launch e-mail directly from the work to inform contributors or other stakeholders of changes, criticality, inform them of new unstructured information and more.

- System generates Alerts for the right person when work needs attention.
- Option for staff contributor to accept or reject an assignment on an engagement. This information gives the project manager quick feedback from the contributor and the opportunity to reassign tasks.
- Progress is driven by the staff through their reported time. Staff communicates changes and issues as the work is being done.
- Key word search on the resolution of a service request to find similar conditions in other requests, which can improve work estimates and client communications.
- PlanView tracks top-down budget, and budget by any entry in the cost breakdown structure. Track and report budget for labor and non-labor costs, billable and non-billable costs. Set rates, cost units, etc. for each resource.

—Cont'd.

# Project Management (continued)

## Manage Work...

- Familiar spreadsheet interface with columns and column groups that can be easily toggled between expanded/collapsed. Includes To-Do lists, drop-down menu choices (tailored for customer), message flags, attachment flags, and other icons in main display. Gantt display shows dependencies, and CPM information such as float, lag, etc. Unique resource usage histogram shows staff workload, indicators for over/under capacity. Displays Schedule Maturity Index values in spreadsheet view. Toggle between graphic and spreadsheet displays.
- System maintains logical relationships so that managers are automatically notified of schedule changes that impact their work, while still respecting the authority defined via the Schedule Maturity Index.

- PlanView's collaborative CPM uses the familiar definitions of Critical Path found in the PMBOK® framework such as early dates, late dates, float, lag, etc.
- Project templates supported, from methodologies, best practices, etc. Includes information on activities, duration, relationships, roles/skills required, effort and unstructured information. Use model distribution feature to adjust the template to the project.
- Unlimited activities, resources and calendars. Unlimited baselines, work breakdown structure, and organizational breakdown structure levels. Logical relationships can be set at any work breakdown structure level.
- Powerful, integrated Resource Search Engine queries resource database by skills,

- proficiencies, availability, and "other" criteria to find the best person(s) for each task.
- Allocating work is integrated with skills scheduling: simply click on names in ranked list to assign. Scheduling engine algorithm incorporates the availability of workforce, or this can be toggled off.
- Authorize work for charges before detail planning. Service work can have its own workflow. Include service within a project or manage it outside of projects. Allow contributors to add service as required and simplify the resource assignment (perform a general authorization to specific groups or departments).
- User-defined work and resource structures for sorting, selecting and reporting, at "any" level.

## Submit Status...

- Projects are progressed by staff contributors reporting hours worked, expenses, and estimates of hours remaining. Process is automated to save time. Actual hours as well as % complete used when statusing remaining work.

- Work can be statused with the option to reschedule all remaining work after time now (work driven) or to leave remaining work scheduled in the past (resource driven).

- Repository wide process to post approved updates for project statusing. Work can also be excluded from the progress cycle, if needed.

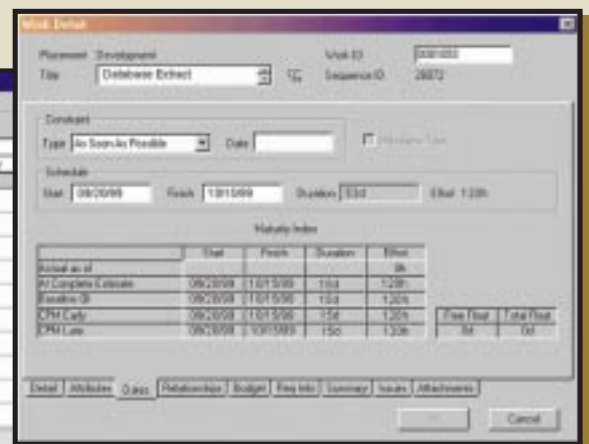
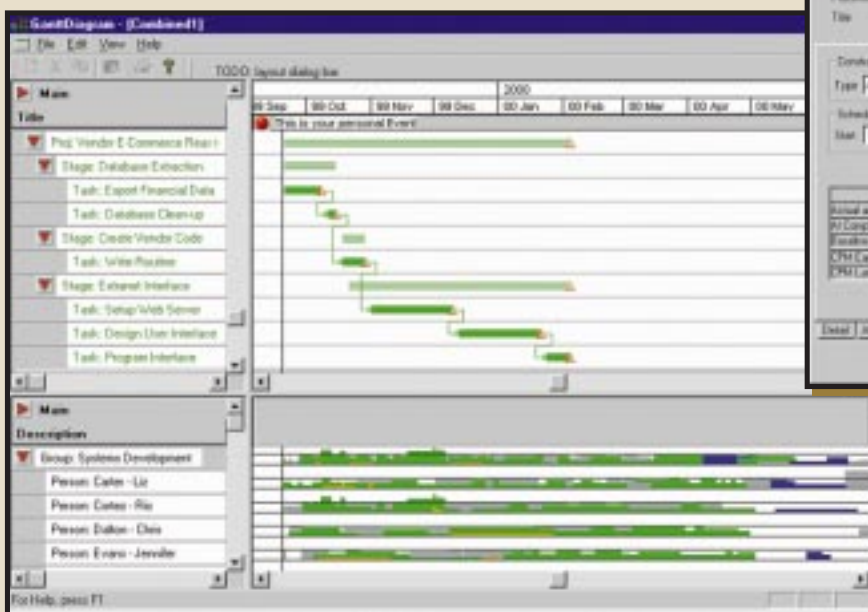
## Exchange Work

- Merge Microsoft Project with the PlanView central repository using a simple, powerful, bi-directional interface. Helps to leverage your costs and training in Microsoft Project.

- Set up Microsoft Project resources from the PlanView central repository to assure consistent resource identification.

- Initialize Microsoft Project files with PlanView templates to refine effort and assure consistency.

▼ *Intuitive graphical user interface displays information in worksheets grouped by tabs, or as spreadsheets, etc.*



◀ *Combination Gantt charts and resource profiles use green for scheduled work, blue for reserved, gray for out-of-department assignments, and gold for standard work (vacation, training, etc.).*

# Resource Management

## GENERAL

- Central repository holds resource information such as skills, cost rates, schedule and other info on each staff contributor, as well as project information, to be accessed by managers and others in real time. Can include not only staff, but contractors, subcontractors, etc.
- Web interfaces let you manage a globally distributed workforce, and ensure that all the staff updates the same knowledge

- repository. Input issues and concerns on individual resources, attach resumes and other documents to enhance collaboration.
- Workforce availability is based on project work, as well as recurring work, customer support, administrative, etc., so you manage to true capacity, avoiding overbooking or underuse to maximize billable time.
- Project progress is automated from time reporting, with great flexibility. Resource

- Managers can close work or update assignments, etc.
- Staff recruiting and forecasting is based on both approved and pipeline projects. Complete pipeline (early stage as well as authorized work) can be used to project skills and to drive recruitment. Create over/under staffing reports by skills, customer, or other criteria as part of your staff forecasting process.

## Manage Work...

- Familiar spreadsheet interface with columns and column groups that can be easily toggled between expanded/collapsed. Includes To-Do lists, drop-down menu choices (tailored for the customer), message flags, attachment flags, and other icons in main display.
- Gantt display shows dependencies, and CPM information such as float, lag, etc. Unique resource usage histogram shows staff workload, indicators for over/under

- capacity. Toggle between graphic and spreadsheet displays.
- Managers search within their responsibilities or across the repository (which can include subcontractors and other outside resources) for the best person for a task. Search can include resource attributes, like skills, proficiency, location and more. Search can be limited by availability or use availability in scoring the resources. The result of your search is a ranked list of the "best" fit available for

- your needs. The resource searching is integrated with the scheduler, so you simply click on the list to allocate resource.
- Resource Scheduler engine on the application server is used to evaluate each resource's workload and then reschedule staff based on work priority, criticality and more. Include overloads and overtime, if needed, and engine will restructure the workload profile to make best use of resource time.

## Administer Resources

- Option for staff to review their portfolio and accept or decline assignments.
- Option for staff to self-administer their skills and other criteria and standard activities (like vacation and training)

- over the web and from anywhere in the world, with managerial approval. Helps keep data in the central repository fresh to leverage your staff's acquired knowledge.

- Attach unstructured information to the staff records in the resource database, such as professional resumes, training programs, fields of interest and more.

## Submit Status...

- PlanView's professional time and expense tracking makes it easy to document actual performance by work type, project, contract and other parameters to meet account and management requirements and to track to GAAP requirements for internally developed software.

- Managers use the time and expense information from the staff's web-based, integrated, time and expense status reports to progress projects and drive the customer billing process.
- Staff can be authorized on work (such as doing specific customer service) so new

- work can be logged against even before the engagement or service request/project is formally rescoped or added.
- Staff can add work entities on the fly when statusing time and expense and then log time to the entity.

Creating a skills database supports skills searching.



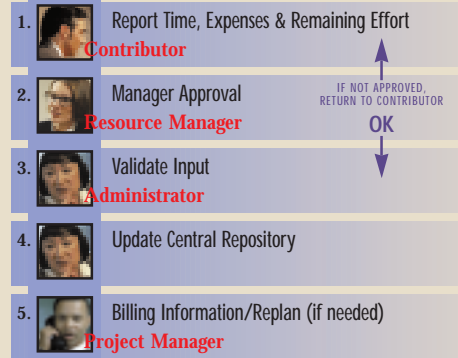
# Time & Expense Accounting

## GENERAL

- Web-based electronic timesheet replaces legacy systems, includes expense reporting, can automatically forward timesheet for manager approval. Includes on-line help with user guide. Tightly integrated with project and workforce management. Transaction-based audit trail of changes. Error checking to your business rules.
- Enter budget at project level for labor and non-labor costs. Budget by any entry in the cost breakdown structure. Track changes to non-labor costs, track actual versus budget data. Costs can be labor or non-labor, billable or non-billable. Set standard rates, effective dates, cost units, and overhead by individual resource.
- System generates Alerts to notify user when timesheets are missing, unapproved, or (for managers) ready to approve.
- Provides professional-level time and expense tracking needed to comply with requirements of SOP 98-1, GAAP

procedures for publicly held companies for accounting for the costs of in-house software. Track design separate from maintenance, and training separate from support, etc.

- Repository wide process to post approved updates for use in billing and project statusing. Work can also be excluded from the progress cycle, if needed. Work can be statused with the option to reschedule all remaining work after time now (work driven) or to leave remaining work scheduled in the past (resource driven). Run progress and review results before the results are committed to the database (undo option).
- Generate bills for clients in effort (for instance: hours) or value (for instance: dollars). Effort is converted to value using a variable rate over time. Complex billing methods supported through application partners.



- Supports standard interfaces for Oracle Financials and Computron (for invoicing, for example). PlanView Application Programming Interface (API) is currently in use by customers and third parties to support interfaces with J.D. Edwards, SAP, PeopleSoft and internally developed financial systems.

## Submit Status...

- Contributors submit status on-line or can enter data off-line and upload later. Staff also enters their estimate of remaining work (in hours) and can attach documents or free-form comments

to their tasks. This drives client billing and project status.

- Track expense to the activity and to the day of the week. The cost breakdown structure is driven from user's unique cost

elements, so expenses can be reported on any item. Report and track billable and non-billable, direct input and calculated values (such as mileage to monetary unit).

## Approve Status...

- Option to approve time and expenses before use for billing and updating project status. The approver can selectively approve or disapprove the complete timesheet.

- Approver (manager) has the option to update remaining effort.
- Expenses do not have to be turned in concurrently with time reported. Expenses have their own approval cycle.

- Depending on local setup, the status of approval can be e-mailed to the contributor or put in their queue for when they next submit status.

Description	Request							Status			
	Mon	Tue	Wed	Thu	Fri	OT	Total	Prog	Remains	Calc	Remains
Prog 000007 - Production Support											60%
Task: Expect Process/Date	8h	2h	7h	8h			15h	15h	15h		100%
Activity: Meetings	2h	2h					4h	4h			8h
Activity: User Support	2h	4h	7h				13h	13h			8h
<b>Total</b>	<b>8h</b>	<b>8h</b>	<b>8h</b>	<b>8h</b>			<b>32h</b>	<b>32h</b>			<b>152h</b>

Expense Type	Week					Week Total
	Mon	Tue	Wed	Thu	Fri	
Transportation	36.00				34.00	70.00
Mileage	23.00	34.00	45.00	36.00	27.00	165.00
Other Travel	10.00				10.00	20.00
<b>Total Billable</b>	<b>71.00</b>	<b>34.00</b>	<b>45.00</b>	<b>36.00</b>	<b>71.00</b>	<b>317.00</b>
<b>Total Non-Billable</b>	<b>43.00</b>					<b>43.00</b>
<b>Grand Total</b>	<b>114.00</b>	<b>34.00</b>	<b>45.00</b>	<b>36.00</b>	<b>71.00</b>	<b>360.00</b>

On-line or off-line time and expense reporting integrates with project management.

# Strategic Management

- System supports Project Office/Program Office requirements, including earned value analysis at portfolio or program levels, executive-level reporting, formal engagement closure and skills updating.
- System supports input of both external (client-assessed) priority and internally assessed priority rating.
- Unique Schedule Maturity Index assigns a rating to each project based on the maturity of its information in the central repository. Managers have comparative information about confidence or risk by knowing maturity. Schedules mature as they move from entering a work breakdown structure, to running a CPM, to resource searching, resource allocation, acceptance/rejection by staff, staff reporting time and progressing the project, and finally project close. System generates SMI numbers tailored for your environment—you set the values for each stage.
- Create project templates to share best-practice methods for different industries or processes across or the organization or to integrate business processes with those of outside methodology providers. Easy to re-use best practices by industry or process.
- A project template can include: a work breakdown structure, durations, relationships, roles/skills and other criteria, effort, and attachments of unstructured information, such as proposals, project charters, etc. Easy to copy and adjust using model distribution feature.
- Users have web access to risk management information. Time phasing of the identification of risks supported. Supports organizationally defined categories of risk, such as cost, schedule, resource, technical, etc.
- Track changes, issues and risks on each activity for review at the appropriate levels of authority.
- Free-form descriptions of each risk incident. Track issues before they become formal risks. Track unstructured risk information through document collaboration at the project, activity as well as the resource level.
- Track proposals and presentations in the central repository and the documents used in business development. The repository includes the full pipeline, no matter what stage of development. The information is automatically communicated to the next stage of business development.
- Link to methodology content over the web or Intranet as well as to private or public best practices and other methods.
- Employee skills are “fresh” in the central repository and can include attributes such as “field of interest” allowing a dynamic interaction of staff interests with new products and business areas. New roles and/or skills can be dynamically added and immediately used in pipeline projects and skills forecasting for the future.
- Portfolio management: organize work and workforce data within PlanView by client, contract, work status, work priority, resource or other criteria for easier strategic planning. Access work and resource data in the central repository in real-time using the web. A Wizard offers step-by-step assistance for the casual user.
- Customize roles for your managers that relate to their responsibilities. For instance, the authority to allocate staff or approve time reported could be a function of the resource manager. Senior or executive management can view high-level information for strategy and prioritizing.
- Business development staff has a realistic understanding of the capacity of the organization to deliver work. They can see other engagements, service work and administrative time.
- Business development staff can build client profiles to put current work requests in context of other projects, the contract conditions, etc. They can view workload and forecast by work type, client, contract and product line to evaluate performance and develop business plans.
- Authorize clients to access real-time status on just their work, add new projects or service requests, change the priority or status of work and more through an Extranet. A Wizard helps the casual user. Client data is fresh, not staged, and they become a partner in the project performance. After client takes action, information is automatically routed to the right manager to follow up with scoping, planning, allocating resources, etc.

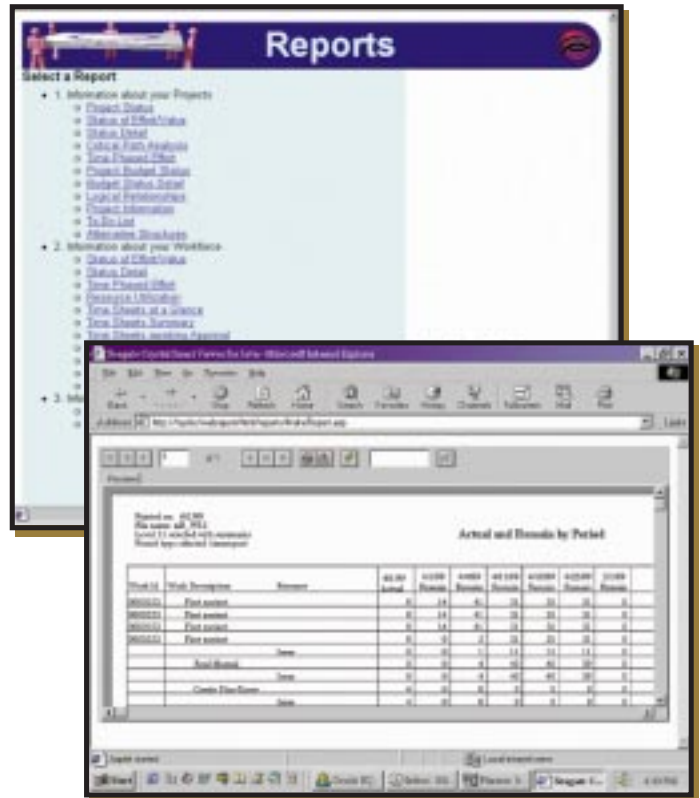
# Knowledge Management

- All work, engagement and resource information, such as skills, rates, and schedule info on each staff/contractor, is kept on one central repository/standard SQL to be accessed by managers and others in real-time, including mobile stakeholders and contributors, via an Extranet.
- Share intellectual assets securely across the enterprise by including both structured and unstructured information. Information is encrypted. Roles enforce the security as well as granting selective work.
- Reminders on HomeView allow users to post notes and time-deployed “ticklers” only they will see.
- Store unstructured information in a consistent, accessible location with the user having control of what is posted and when. Documents, spreadsheets, URL links, etc. can be tracked to projects, activities within projects, service requests and staff members.
- A formal closeout process encourages the collection of work metrics that can be organized by work type, client, product, contract or other attribute to improve estimating of future engagements.
- Staff metrics collected across all work (engagement/project, service and standard activities) and across all work metrics to measure performance and improve estimating future work.
- Alerts on HomeView provide active notification so information is shared in real-time. E-mail is supported from all activities to encourage the appropriate communications.
- Users identify favorites in their HomeView such as project or department websites, threaded discussions, executables, etc. to support collaboration and communication.

# Using *Information* (Reporting)

The Report Engine on the middle tiers allows users to pull and format information from the central repository for reporting. By performing the bulk of the extraction and formatting, the Report Engine also ensures the thinness of the web client. PlanView's Report Engine is accessed through the Reporting FeatureSet. Reports can also be run locally in the Manage Portfolio or Manage Work FeatureSets. PlanView supports multiple levels of access to the central repository for reporting:

1. **Ad hoc reports.** Work and resource information can be copied from a PlanView spreadsheet or local display to any application supporting the Microsoft Windows Clipboard. Drive web publishing, analysis, proposal preparation and more, easily.
2. **Enterprise reports.** The Reporting FeatureSet lets you use the Report Engine to perform extractions. There are dozens of standard report formats that you can customize through various parameters. You can also create, update or delete extracts, all while maintaining full data security. Users can also save the extracts for later comparison "as of" a certain date. PlanView also includes Crystal Web Report Server, so results can be easily displayed in an HTML report format or exported to a variety of other formats (such as spreadsheets or text docs) for analysis, etc. PlanView also supports one-step, presentation-quality Gantt charts.
3. **Tailored reports.** Users can create their own additional reports and perform extractions from the database for them using a developer's version of Crystal Reports. PlanView's Professional Services Group (see page 11) can also be contracted to develop additional customized reports if required.



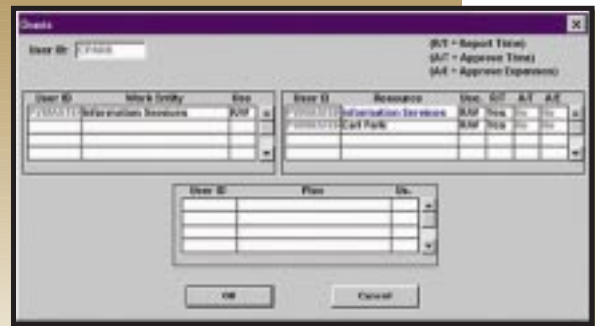
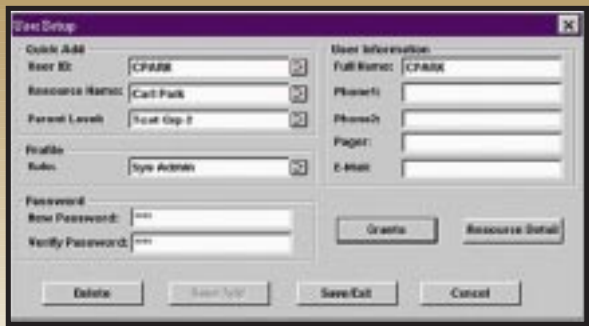
# Administering *PlanView*

PlanView is implemented as an Intranet or Extranet running within a Windows environment. The system is designed for centralized administration. PlanView server applications can be managed from anywhere on the network from one interface using the PlanView snap-in to the Microsoft Management Console. The Application Administrator FeatureSet is included with the PlanView repository, and relatively few users within the client site will administer the PlanView system and the database server. These applications have direct access to the central repository and require local installation of vendor-supplied SQL middleware. The Application Administrator FeatureSet allows the user to tailor and update the PlanView system. From this FeatureSet, the user would perform updates as needed, such as:

- Add and edit users and roles, including authorizations and grants. The Administrator can also delete FeatureSets from individual roles in the default setup.
- Set up primary and alternate structures in the central repository to better track and manage to the organization's culture. Setup calendars, cut-off dates, standard work restrictions, etc.

- Modify profiles, authorize & detail work, set up expenses, etc.
- Run the Progressing Engine to update project schedules from time reported by the staff (who will have used the Submit Status FeatureSet). Tabular screens allow administrators to easily input large batches of updates of new info. Progressing work with the Progressing Engine is a key function of the administrator, and is typically done weekly but is at the discretion of the client. When progressing from reported time, work can be exempted, progress can be assumed, and various other features allow flexibility with this powerful and unique PlanView innovation.

Other tasks of the PlanView Administrator can include extracting information from PlanView for accounting, payroll, and other HR systems. PlanView tailors interfaces between the PlanView central repository and other business software, or this can be done by developers on-site or by third-party developers. The key to this business interactivity is the PlanView Application Programming Interface (API), which speeds the sharing of data between PlanView and other systems. The PlanView API Toolkit comes bundled with your PlanView system.



# Technology

PlanView Software version 6.0 is browser/server software. The PlanView central repository is stored in a SQL database from Oracle, Microsoft SQLServer, or Sybase. PlanView is implemented as an Intranet or Extranet application, and has appropriate security for either choice. Both Microsoft Internet Explorer and Netscape browsers are supported. The system uses Active Server Pages, ActiveX, JavaScript, Java and HTML technology. For clients challenged by bandwidth, PlanView has helped engineer networking solutions. The Web and Application Servers run under Microsoft Windows NT and IIS. The SQL database can run on any hardware supported by the database vendor.

## HomeView: Active Server Page

When a user logs on to the PlanView Extranet or Intranet, based on their user ID and password the system creates an Active Server Page

and dynamically generates their personalized HomeView web portal page. The system also knows the user's authorizations, grants, and rights to the data in the central repository so they see only the appropriate data for them. The system generates customized Alerts for work out of tolerance, etc. The user can further personalize their HomeView portal by revising or adding Favorites and Reminders. Favorites can be anything (a url, an executable, etc.) with a system-supported pathname. Reminders are free text and can be scheduled to display on a certain time (as a tickler) from within the HomeView window. PlanView provides a Script Active Plug-in for Netscape users and Authenticode with the browser client to assure software integrity.

## Business Logic on the Servers

The enterprise services are server-centric business applications to enhance collaboration

and decision-making using the web. The Planning Engines calculate critical path, perform resource searches, balance resource schedules and progress the schedules based on billing and project-status information reported to the central repository. The gateways manage collaboration and link roles to the repository. Business interactivity is the sharing of information with other business systems and the application administrator maintains data integrity. PlanView's storage of unstructured information is server-centric; in other words, the user has the flexibility to work with their information off-line and then post the information to the server. The set-up of the server ensures high performance on the LAN, disk, and I/O.

## Web Client Hardware:

- Minimum 120MHz processor with 24MB RAM (NT Workstation requires 48 MB RAM)
- Internet Explorer 4.5+ or Netscape 4.06+
- Minimum 4MB disk space
- TCP/IP connection to LAN/Intranet
- Bandwidth needs vary: 28.8K baud minimum but faster is better

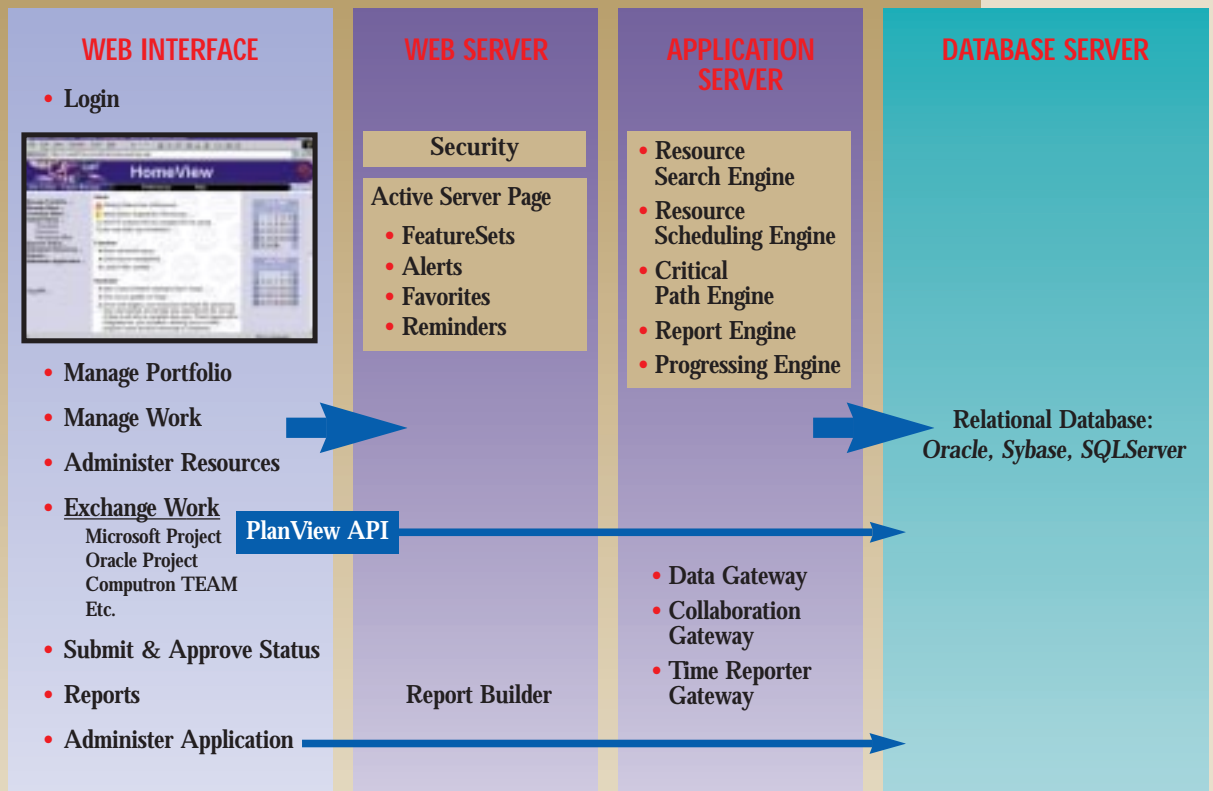
## Application/Web Server Hardware:

- Requirements vary widely by user base and usage
- Minimum 450MHz dual processor with 256 MB RAM
- Windows NT4+, IIS4+, and NT Service Pack 4+
- 1 MB temporary disk storage per user
- 32-bit SQL middle-ware and ODBC drivers
- Minimum 10 MB/second connection to database through ODBC

## DBMS Hardware:

- Requirements vary widely by user base and usage
- PlanView supports whatever hardware the DBMS vendor requires.

*PlanView's web-based, multi-tier environment.*



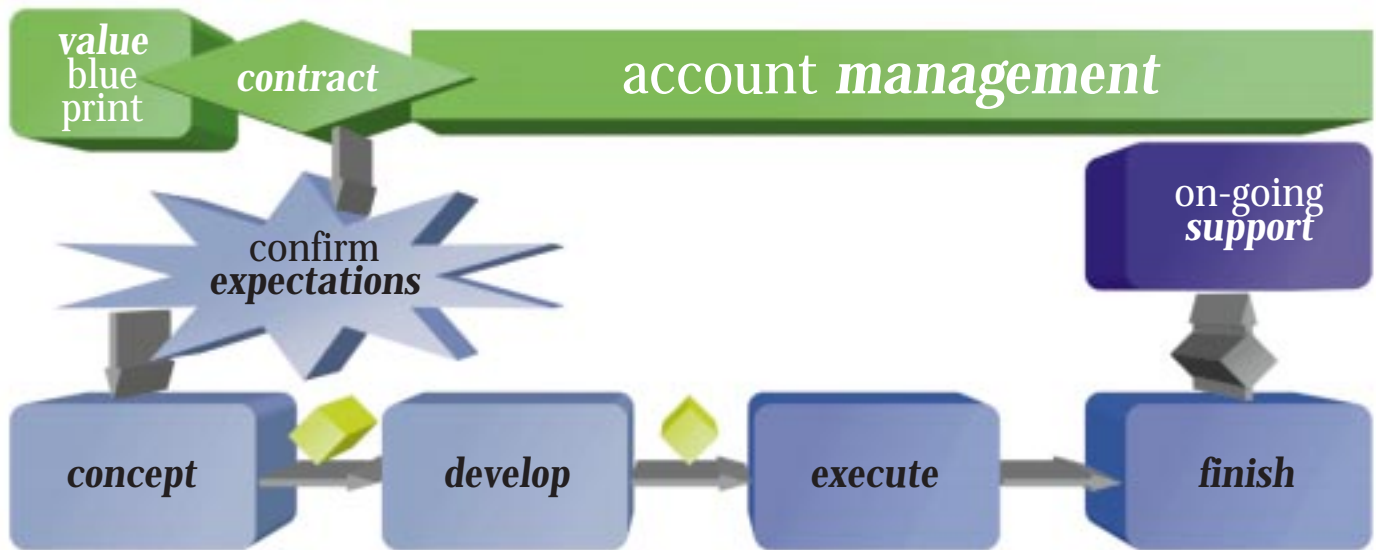
# Professional Services

PlanView has vast experience in implementing Project Delivery solutions and offers several route maps to guide the organization as to the best approach for their unique needs. One route map is a fast track that will have the software operational in a few weeks, but a typical implementation is ten to fourteen weeks.

PlanView's proven approach to implementing an enterprise-wide project management system is based on our 200+ client installation experiences. PlanView has used the standard definition of phases found in the Project Management Institute's PMBOK®. Our consistent, repeatable approach involves your Regional Sales Manager, an Account Manager, an Implementation Manager, and an Implementation Consultant. On the client side, your team would typically consist of a Project Sponsor, Project Manager, your PlanView Administrator, and Pathfinder Team Members.

The four project phases to the typical implementation are:

1. **Concept:** the project charter, implementation schedule, business needs analysis, technical assessment, ...
2. **Development:** installing and initializing software, setting up business rules, creating a procedures guide, training of Pathfinder Team Members, ...
3. **Execute:** Pathfinder Pilot project to validate the business model, training, mentoring, migrating existing projects into the central repository, ...
4. **Finish:** audit, final checkpoint, support plan, go live!



# Product Support

A standard maintenance agreement with PlanView includes support and free maintenance upgrades for 12 months. Extended or custom maintenance agreements can be tailored for your organization. For support, PlanView's experienced and friendly product support staff is available by web or fax 24 hours a day, 7 days a week. Telephone support is also available in the USA and Europe during regular business hours. Once a year, PlanView also hosts a PlanView User Group Meeting, an event highlighted by peer presentations, Q&A with our developers and professional services consultants, and fun.

PlanView customers are offered web access to PlanView's HelpDesk Extranet, a part of our continuous service improvement program. Use the on-line HelpDesk to report issues, review and status issues, search the knowledge base

to find answers to common questions, and communicate to PlanView. Issues that cannot be immediately resolved are prioritized and managed through our formal escalation process. Customer requests and concerns help to drive future development, so PlanView is very active in promoting an on-going relationship with our user community.

A PlanView Professional Services consulting engagement can be contracted even after your PlanView system is up and running. For instance, PlanView has assisted clients in building procedures guides or provided mentoring staff as an on-going process. PlanView's professional services process typically confirms the expectations and terms of these additional engagements in a Statement of Work (SOW), for approval of and signature by the client.

Founded in 1989, PlanView Inc. is the world leader in integrated project and workforce management software and services.

Headquartered in Austin, Texas, PlanView has offices in Dallas, Washington DC, Atlanta, Sacramento, New York, Portland, and in Germany, Italy, Holland, and the U.K.

Our customers are typically Global 3000 industry leaders, and include AllTel Information Systems, adidas-Salomon, Allianz, Anheuser-Busch, Dell Computers, First Union, iXL, Katun Corp., Lands End, Ralston-Purina, Sprint Paranet, USAA, and many more. Call, email or visit our website to request a free CD demo for more info...



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