

Product Datasheet

PLANVIEW PRISMS BEST PRACTICES AND PROCESS MAPS

An Adaptive Environment of Guidance and Automation for Improved Business Processes

Planview PRISMS provides guidance on how to achieve operational excellence through the use of an adaptive environment made up of more than 180 best practices, backed by thousands of process and procedural steps documented through online and on-site services, guides, and software.

Using PRISMS as a baseline, you can consistently communicate improved operating principles throughout the different levels, roles, and parts of your organization. A common understanding of the challenges facing knowledge-based environments—and practical techniques for addressing them—aims in adoption and teamwork, leading to faster time-to-value of your Planview Enterprise investment. The tight integration between Planview Enterprise and PRISMS means that you can get deeper guidance to optimize the best practices and supporting automation capabilities.

PRISMS offers an array of business management techniques—honed from 20 years of experience with hundreds of Planview customers across many different industries—that are specifically designed to address the challenges faced by knowledge worker environments. The PRISMS body of knowledge is continually enhanced with new learnings and topic areas, ensuring that it remains relevant to your growing needs and maturity levels.

Its framework enables you to assess your overall business process maturity, locate process gaps, overlaps, and friction points, visualize how your existing supporting business applications interact, and plan and execute your Planview Enterprise deployment phases. PRISMS Process Maps concentrate on specific process areas to provide increasing levels of detail and are aligned to respective PRISMS Best Practices guides for easy cross reference between processes and supporting practices.

You can acquire a bundle of all the PRISMS Best Practices Libraries and PRISMS Process Maps or can choose solution-specific collections through PRISMS RPM™ (Rapid Portfolio Management™) Solutions to suit your current needs.

PRISMS Best Practices Library

The PRISMS Best Practices Library fills the gap between philosophical approaches and the keystroke-level functional guidance found in user manuals. Included are thousands of predefined and prepopulated process and procedural steps for performing any variety of functions, from the strategic to the project-level.

Users experience a cohesive and consistent approach through the varied Best Practices delivery vehicles, which include a library of published guides, with both role- and responsibility-specific information plus collective guidance that aligns to a unified set of concepts that complements Planview Enterprise functionality.

7 PROCESS AREAS SUPPORTED BY PLANVIEW PRISMS

1. Strategic Planning

Define the business plan, analyze change effects, develop missions and tactics

2. Demand Management

Request work, check status, review lifecycles

3. Capacity Management

Balance resources & demand to determine capacity

4. Financial Management

Define funding demands, build strategic budget

5. Work and Resource Management

Plan, manage, and control work and resources using roles

6. Cost Management

Determine true costs and variance to what was budgeted

7. Benefit Realization

Measure the benefits and Return on Investment

Planview Enterprise

Planview Enterprise® is a comprehensive, market-leading portfolio management solution. Portfolio management helps you optimize your business by balancing strategy against scarce resources—people and money.

Planview PRISMS® optimizes business management and performance with an adaptive environment made up of more than 180 Best Practices, which give you long-term reference aids to speed adoption and drive value. Process Maps provide process- and role-specific templates and documents to enable you to deliver process maturity improvements and realize benefits faster. PRISMS E-Learning is a comprehensive online education approach with instructor-led and on-demand options for fast adoption across your organization. PRISMS RPM Solutions are six solution-specific bundles that enable rapid design and rapid rollout.

All Planview PRISMS offerings help you efficiently and effectively implement your portfolio management solution and achieve rapid ROI on your Planview investment.

Why Planview PRISMS?

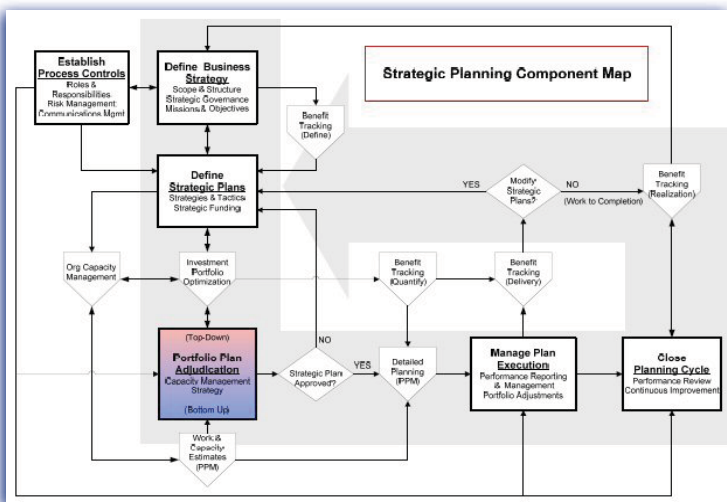
- Integrate disparate perspectives, methodologies, and standards
- Facilitate adoption and accelerate effective use and deployment of Planview Enterprise
- Employ appropriate approaches for unique challenges
- Achieve seamless automation and alignment
- Realize continuous business process improvement
- Get a rapid return on your portfolio management system investment

You choose which parts of the PRISMS Best Practices Library you want to deploy to best fit the needs of your organization; adjustments are made to the software and are reflected in what users can access. Selected best practices (or portions of them) are also encapsulated and provided referentially within Planview Enterprise through its Intelligent Help feature. This enables you to quickly access related PRISMS information based on what functionality you are using in addition to typical user help content.

PRISMS Process Maps

The PRISMS framework establishes the structure, concepts, and constructs for other underlying PRISMS elements and forms a cohesive operating model that leverages the strengths of various management techniques and approaches while accommodating their interdependencies. Meanwhile, PRISMS Process Maps concentrate on seven functional process areas that help build mind-share and provide a level of iteration within the Planview Enterprise portfolio management framework.

PRISMS provides high-level Component Maps – such as the Strategic Planning Map below – that define the structure and scope of business functions within each process area. Each Component Map contains four to eight major functional phases (components) such as *Define, Plan, Manage Execution*, etc. Each Component lists the major sub-functions that relate to specific process activities such as *Define Scope*.



Planview PRISMS Strategic Planning Map

These components and activities are aligned to how the PRISMS Best Practices are structured to provide process and product guidance on how to effectively achieve process performance. When appropriate, Component Maps have associated Process Step Maps that provide working-level detail for the business process.

Planview PRISMS provides templates for such areas as work breakdown structures, example documents, forms, dashboards, and process updates for roles across the organization. These process-specific maps can amplify your own internal process improvement capabilities by offering a significant body of work for process architects to leverage. This body of proven guidance for business process integration can be used to design and document your own procedures and policies and maximize the extensive functionality in Planview Enterprise.

When Planview Enterprise Business Process Manager is deployed, Planview PRISMS Process Maps are pre-loaded into that platform and links are included to appropriate Planview Enterprise screens and other supporting features such as compliance checklists.

PRISMS Reference Database

Included with Planview PRISMS is a pre-configured reference database that puts Planview PRISMS Best Practices and Process Maps in action, using the full range of Planview Enterprise capabilities. It includes various types of work in different stages of progress, resources and assignments, strategies and investment portfolios, products and applications, and services and assets. These contents are enabled through a rich set of configuration elements, including various attributes with pull-down menus, automated workflows, configured screens, and numerous reporting capabilities.

The PRISMS Reference Database serves as a model operating environment that can be explored and offers an example of how to best configure Planview Enterprise. As you find certain configuration components that closely match your own needs, you can export those into your own development instance of Planview Enterprise. As your implementation advances in levels of maturity, you can deploy additional capabilities from the database.

Benefits of Using PRISMS Best Practices and Process Maps

The unique structure of PRISMS Best Practices and Process Maps delivers not only the concepts, architecture, and design needed to foster process improvement, but also the automation and integration necessary to put those processes into action. Organizations can build process maturity with confidence and efficiency by leveraging the included process lifecycles and automated workflows, configuration examples, templates, dashboards, and other business intelligence components. PRISMS offers a proven roadmap to process excellence unlike any other in today's marketplace. The results are a rapid return on your investment, a high level of adoption, and the flexibility and guidance to easily implement additional processes.

To learn more, visit www.planview.com/prisms today.

PLANVIEW PRISMS PROCESS MAPS AND BEST PRACTICES OVERVIEW

FUNCTION	BENEFITS
<p>PRISMS Performance Management Framework: Lays foundation for structuring business processes</p>	<p>Provide a mechanism for placing major enterprise or business unit functions in context with each other to enable the entire organization to function as a dynamic and interconnected entity</p> <p>Drive change and enable higher performance and innovation</p>
FEATURES	
<p>PROCESS ARCHITECT GUIDE, COMPONENT MAP STRUCTURE, PROCESS FRAMEWORK COMPONENT MAP</p>	

FUNCTION	BENEFITS
<p>Strategic Planning: Establishes a consistent process framework aligned with enabling functionality to develop and manage the hierarchy of missions, objectives, strategies, and supporting tactical guidance at an enterprise level and/or within individual business units and departments</p>	<p>Improve collaboration with business partners, enable greater transparency of decision making to meet business requirements and shareholder expectations, and contribute to the alignment of work execution to strategic direction</p>
ASSETS	
<p>BUSINESS STRATEGY GUIDE, INTEGRATED STRATEGY SUMMARY PROCESS AND PROCESS STEP MAPS AND STRATEGIC PLANNING COMPONENT MAP, STRATEGIC PROJECT PROCESS STEP MAP, INVESTMENT ANALYSIS GUIDE, INVESTMENT PORTFOLIO OPTIMIZATION COMPONENT MAP</p>	

FUNCTION	BENEFITS
<p>Demand Management: Provides a single, centralized location where managers, employees, and stakeholders can request work, check status, delegate requests, and review lifecycles</p>	<p>Utilize structured processes to prioritize all demand and dispatch work to optimize business results</p>
ASSETS	
<p>DEMAND MANAGEMENT GUIDE</p>	

FUNCTION	BENEFITS
<p>Capacity Management: Matches available resources with business demands; forecasts resource capacity for base services, current commitments, other planned work, and proposed commitments</p>	<p>Ensure that organizational capacities support business strategies</p> <p>Have the right people, services, and infrastructure at the right place at the right time, respond to competitive pressures by making better decisions, and capture and communicate the total cost of a business service or product</p>
ASSETS	
<p>APPLICATION PORTFOLIO MANAGEMENT (APM) GUIDE, APPLICATION PORTFOLIO MANAGEMENT COMPONENT MAP AND PROCESS STEP MAP, ORGANIZATIONAL CAPACITY MANAGEMENT COMPONENT MAP, ASSET MODEL STRUCTURE GUIDE, ORGANIZATIONAL CAPACITY MANAGEMENT GUIDE, SPM/APM INTEGRATED COMPONENT MAP</p>	

FUNCTION	BENEFITS
<p>Financial Management: Provides a central platform for defining, linking, and communicating the total costs of programs, projects, services, and incidents</p>	<p>Improve financial transparency, efficiency in the budgeting process, decision support, and financial governance</p> <p>Mitigate financial and operational risk and accommodate changing priorities, perceptions of business value, possible approaches, subsequent estimates, regulatory requirements, and more</p>
ASSETS	
<p>FUNDING OBJECTIVES AND STRATEGIES GUIDE, FIRST PASS PLANNING AND ESTIMATING GUIDE, MANAGING THE PLANNING HORIZON GUIDE, FINANCIAL PORTFOLIO MANAGEMENT PROCESS STEP MAP</p>	

PLANVIEW PRISMS PROCESS MAPS AND BEST PRACTICES OVERVIEW

FUNCTION	BENEFITS
<p>Work and Resource Management: Facilitates planning, managing, and controlling work and resources from a single location</p> <p>Includes Project Management, Work Management, Service Management, Resource Management, Requirements Management, and Time Reporting</p> <p>Measures performance in real time</p>	<p>Determine resource availability, assign the right person to the job, prioritize work, eliminate operational bottlenecks, increase project performance</p> <p>Mitigate risks and manage change</p> <p>Establish repeatable and more predictable execution and delivery</p>

FEATURES
CONTRIBUTOR GUIDE, MANAGEMENT INTEGRATION CENTER GUIDE, MICROSOFT PROJECT CONNECTOR GUIDE, OPTIMIZE RESOURCES GUIDE, PROJECTS GUIDE, INTEGRATED EXECUTION SUMMARY PROCESS MAP, SPM COMPONENT MAP

FUNCTION	BENEFITS
<p>Cost Management: Facilitates viewing, controlling, and tracking of planned versus actual costs</p> <p>Consolidates application inventory and aids in uncovering redundant applications</p>	<p>Manage costs, consolidate all work (labor and non-labor) costs in a central place, and understand the true costs of projects, programs, products, and services</p> <p>Reduce costs through the rationalization of the application portfolio</p>

FEATURES
REPORTING AND ANALYTICS GUIDE, KEY PERFORMANCE INDICATORS GUIDE

FUNCTION	BENEFITS
<p>Benefit Realization: Quantifies benefits and establishes governance against forecasted versus actual returns</p> <p>Provides the process to reintegrate the benefits into Strategic Planning</p>	<p>Discover where decisions led to a good return on investment and where choices resulted in negative or no return</p> <p>Drive efficiencies by becoming a learning organization</p> <p>Deliver more innovative, market-responsive, and cost-efficient products, programs, and services</p>

FEATURES
BENEFITS REALIZATION GUIDE, BENEFIT TRACKING AND REALIZATION COMPONENT MAP



For 20 years, Planview has been advancing the discipline of portfolio management, helping our customers change the way they manage people and money to make better business decisions. With a singular focus on portfolio management, Planview is the only company that combines customer-driven software, unmatched domain expertise, and proven best practices to solve each customer's unique business problems.

Planview Enterprise®, a market-leading portfolio management application suite, with Planview PRISMS®, the knowledge base for accelerating organizational change, delivers measurable business results for IT management, product development organizations and throughout the enterprise. As an independent, trusted partner, Planview is committed to interoperability with key management systems through the Planview OpenSuite™ integration product line. Industry leaders such as Citi, BP, and EDF, rely on Planview to drive revenue, mitigate risk, cut costs, create efficiencies, and ultimately give their businesses a competitive advantage.

Privately held and consistently profitable, Planview is headquartered in Austin, Texas. With offices across North America, Europe, and Asia-Pacific, the company supports customers in virtually every industry around the world. For more information, visit www.planview.com.

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