

Product Datasheet

PLANVIEW PROCESS BUILDER

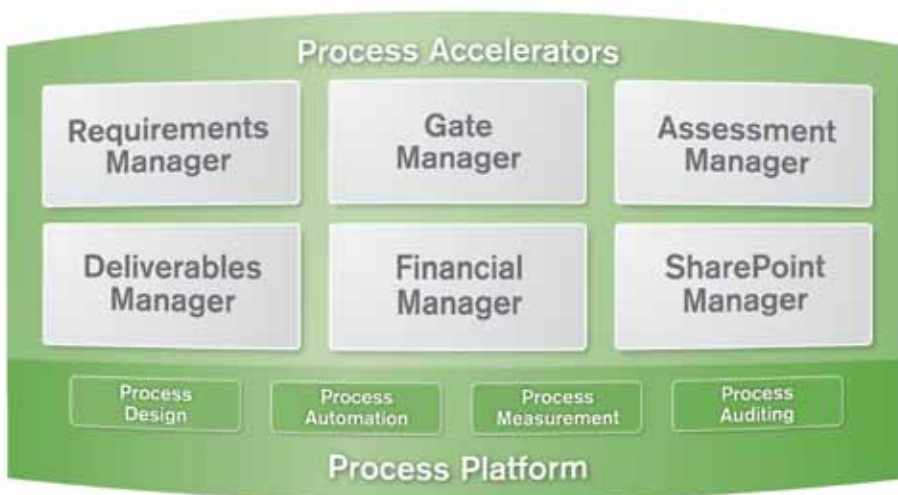
Integrating Process Management into Portfolio Management

Your organization's mission-critical procedures and change initiatives are dependent on the design and adoption of business processes. So it is critical that, across the enterprise, you can answer key questions about these processes:

- **Insight:** What process should be used?
- **Visibility:** Where are we in the process?
- **Accountability:** Who made the decision?
- **Compliance:** Was the process followed?
- **Auditability:** What actually happened?

The Planview Process Builder™ product line gives you answers to those questions, enabling you to embed modeling and management of enterprise-wide processes into your portfolio management framework. This provides you with the increased adoption, control, tracking, and audit capabilities you need in key process areas, such as:

- Requirements management
- Product development
- Quality management
- Deliverables management
- Assessment management
- Financial compliance
- Regulatory compliance
- IT governance



Integrated with the Planview Enterprise portfolio management solution, Planview Process Builder helps you increase process adoption, accelerate process maturity, and improve organizational performance.

Using the open platform of the Planview Process Builder, you can easily manage complex business processes in a single end-to-end view. Solve real business problems and achieve process excellence by gaining adoption, compliance, and continuous improvement of processes.

The Planview Process Builder platform powers the key, interrelated functions of **Process Design, Automation, Measurement, and Auditing.**

Planview Process Builder

The Planview® Process Builder™ product line enables organizations to embed modeling and management of enterprise-wide processes into the portfolio management framework, helping increase process adoption, accelerate process maturity, and improve organizational performance.

The Process Builder platform powers the functions of process design, automation, measurement, and auditing. On this foundation are built the Planview Process Accelerators, preconfigured best-practice templates that support specific business needs.

Learn more at www.planview.com/Process.

Use Planview Process Builder and the Planview Process Accelerators to:

- Integrate and automate portfolio management capabilities across the enterprise
- Enable process adoption, control, tracking, and auditing
- Realize operational efficiencies with a single view of enterprise-wide business processes
- Easily define, model, and build processes in your corporate style
- Improve process maturity and visibility with automation
- Support auditing and compliance

What are your top innovation plans in the new economy?

The #1 answer:

“Make business processes more efficient.”

— InformationWeek Analytics Survey of 500 Executives

PLANVIEW PROCESS ACCELERATORS

Built on the Process Builder foundation are the Planview Process Accelerators, preconfigured best-practice templates that support specific business needs:

- **Requirements Manager**
Process Accelerator helps you capture, manage, link, route, trace, and audit product requirements throughout their lifecycles.
- **Gate Manager**
Process Accelerator manages, automates, and monitors gate-driven product development processes.
- **Assessment Manager**
Process Accelerator empowers teams to make project assessments and project audits visible throughout the enterprise.
- **Deliverables Manager**
Process Accelerator provides visibility and status of deliverables across multiple stages and departments for a single project.
- **Financial Planning**
Process Accelerator streamlines the investment planning process across the entire organization.
- **SharePoint Manager**
Process Accelerator leverages Microsoft® SharePoint® content management capabilities to store template- and process-specific forms and documents.

Process Design for Simplified Process Execution

Processes can be defined, modeled, and modified with easy-to-use configuration tools, and in your organization's look and feel

Use Planview Process Builder to model processes in a visual format for improved adoption control and tracking. Your processes, and the supporting forms and documents—such as process feedback questions, reviews, approvals, reports, deliverables, compliance checks, change requests, validations, and assessments—are designed in the specific format your company requires and brought to life, transforming drab flowcharts into clear, actionable processes.

Easy-to-use configuration and drag-and-drop process editing tools make it easy to import your organization's custom process map into Planview Process Builder, further spurring adoption by giving everyone a familiar, user-friendly environment.

Design and model your processes in Planview Process Builder, regardless of whether they are associated with Planview Enterprise. All processes can be modeled—custom processes or those based on industry standard methodologies, such as CMMI®, Stage-Gate®, PACE®, Six Sigma®, PMBOK®, Planview PRISMS®, ITIL®, Sarbanes-Oxley, and SDLC.

Process Auditability for Repeatable Outcomes

A common, user-friendly interface to model and manage processes supports adoption and improves the consistency of outcomes

Planview Process Builder helps make processes auditable, and their outcomes repeatable, and thus predictable. It helps you review decisions—what decisions were made by whom and when, as well as the justifications for making those decisions—complete with change requests, process approval steps, and other accountability components.

By modeling all your organization's processes in a central location with consistent, auditable fields, passing compliance and audit reviews are streamlined, simplified, and more cost-effective. And with Process Builder, you can see graphical representations of compliance.

Process Automation for Enterprise-Wide Cost Savings

Operational efficiencies are realized across the organization by automating complex processes

Planview Process Builder supports enterprise-wide business processes, creating a single, comprehensive view into business processes in action. Process automation provides stakeholders with an accurate, centralized view of the status of various phases and key deliverables in a process.

Your organization can save time and money by streamlining process reviews, reducing time to gather process status, ensuring that all deliverables are completed before moving forward, and simplifying process audits.

Process Measurement for Compliance and Adoption

Improve compliance measurement, efficiency, and accountability, and enjoy the benefits of continual process improvement

Planview Process Builder enables you to track and report on the level of process compliance, including which processes are being followed, as well as capturing exceptions for analysis and audit purposes.

It makes organizational processes available to all stakeholders, establishing them as a visible guide for finished and unfinished work. Business processes change from static documents to active guides for day-to-day work to improve the consistency of outcomes.

Reduce adoption and training costs by taking the process out of manuals and automating them. With the ability to link to other applications and tools, including Microsoft® Office® documents and image files, Process Builder furthers adoption because users are able to work within applications they know and in which they already have time and information invested.

Knowing how process execution changes over time is essential to understanding trends in process adoption. Process Builder maintains a complete process execution history for measurement, analysis, accountability, and audits. In addition, you can export any process measurement data to HTML, XML, Microsoft Excel®, or other formats for further analysis in other applications.

GET STARTED TODAY!

Learn more at www.planview.com/Process

PLANVIEW PROCESS BUILDER OVERVIEW

FUNCTION	BENEFIT
PROCESS DESIGN	Processes can be easily modeled, defined, and modified with easy-to-use configuration tools, and may be branded with your organization's look and feel.
FEATURE	ADVANTAGE
PROCESS EDITOR	Allows processes to be easily edited using a graphical drag-and-drop editor with the ability to import process drawings from Microsoft® Visio®.
COMPONENT DESIGNER	Provides the ability to create new components from scratch such as unique data elements to reflect the elements necessary for process execution. This allows Planview Process Builder to extend process management to other applications throughout the organization.
TEMPLATES	Standard templates, including reviews, actions, and attachments, are provided, and can be further configured to support the organization's look and feel.
NOTIFICATIONS	Users can be notified when certain events occur (for example, an email can be sent when a review is overdue, or an issue that has not been resolved in a timely manner can be escalated appropriately). Integration with Microsoft Outlook® enables information to be sent easily via email.
COMPLIANCE CHECKS AND METRICS	Embedded compliance functions and process KPIs enable measurement of the effectiveness and compliance of your organization's processes to increase accountability.

FUNCTION	BENEFIT
PROCESS AUTOMATION	Planview Process Builder creates a comprehensive view of business processes across applications, which allows operational efficiencies to be realized through the capability to automate complex tasks.
FEATURE	ADVANTAGE
STANDARD PROCESSES AND METHODOLOGIES	The Process Editor and Component Designer in Planview Process Builder are ideal for modeling and representing standard processes and methodologies such as CMMI, Stage-Gate, PACE, Six Sigma, PMBOK, Planview PRISMS, ITIL, Sarbanes-Oxley, and SDLC.
CORPORATE PROCESSES	Processes in Planview Process Builder can be configured to replicate the look and feel of corporate styles and flowcharts, enhancing familiarity and adoption.
INTEGRATIONS	Planview Process Builder is fully integrated with Planview Enterprise, and information can be transferred bi-directionally between the two products. Additionally, Planview Process Builder can integrate with any off-the-shelf or home-grown application to ensure all aspects of processes can be modeled — regardless of where the deliverables are developed.

FUNCTION	BENEFIT
PROCESS MEASUREMENT	Users can track the level of compliance to process and report information, including how well processes are being followed, as well as capturing exceptions for analysis, audit, and continuous process improvement purposes.
FEATURE	ADVANTAGE
AUDITS, VERSIONING, AND HISTORY	A complete history is maintained for analysis, accountability, and audits. Previous versions of data are maintained and can be viewed as they appeared at any time in the past, with complete histories of who made which changes when.
REPORTING	Tabular reports can be used to gain insight into how processes are being used, including data on how long processes remain in various states. These reports may be exported, sorted, reformatted, and queried, providing information on how process usage has changed over time so your organization can understand trends in process adoption and determine actions for process improvement.
EXPORT	Export any process data to HTML or XML for further analysis. XML data can also be transformed into other formats, including .csv, for use in other applications.

PLANVIEW PROCESS BUILDER OVERVIEW (CONTINUED)

FUNCTION	BENEFIT
PROCESS AUDITING	A complete process execution history is maintained for measurement, analysis, accountability, and audits to ensure that your organization can efficiently, accurately, and cost-effectively pass both internal and external audit reviews.
FEATURE	ADVANTAGE
TRACEABILITY MATRIX	Through graphical representation of how a requirement or deliverable is related to other entities, change requests, validation tests, and supporting documents, your organization can quickly and easily evaluate a process to ascertain the validity and reliability of information.
FEEDBACK LOOPS	Planview Process Builder contains embedded feedback loops to Process Managers, enabling process users to comment on potential process improvements.

ADDITIONAL OFFERINGS	BENEFIT
PLANVIEW PROCESS ACCELERATORS	Planview Process Accelerators are pre-configured templates that solve specific business issues by embedding best practices into process execution to provide consistency and speed implementation.
PLANVIEW PROCESS ACCELERATORS	ADVANTAGE
REQUIREMENTS MANAGER	Capture, manage, link, route, trace, and audit product requirements through their lifecycles, from concept to delivery.
GATE MANAGER	Manage, automate, and monitor gate-driven development processes.
ASSESSMENT MANAGER	Make process assessments and audits visible throughout the enterprise, which is critical for organizations focused on regulatory matters such as Sarbanes-Oxley and FDA compliance.
DELIVERABLES MANAGER	Achieve visibility and control of deliverables at every stage, across your entire organization.
FINANCIAL MANAGER	Optimize company investment decisions by driving the corporate financial planning process.
SHAREPOINT MANAGER	Ensure process compliance by combining the ubiquity of SharePoint content management with the power of Planview Process Builder.



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. For more information, visit www.planview.com.