Planview Enterprise 10.1

An enterprise-level product, project and programme management suite containing interesting, new functionality from a well-established software vendor.

Steve Cotterell returns to a product he's reviewed in the past and finds interesting new functionality that he expects other products will want to emulate.

I've known Planview for many years. This company, which I believe is the only large PPM software company still in private hands, has been around for more than twenty years. Their business is still IT focussed, but now also includes product, portfolio and corporate performance management. It's aimed at medium to large organizations but also has some smaller companies as customers.

I've always found Planview's software to be particularly innovative, leading where others later follow and Planview Enterprise 10.1, released just a couple of weeks ago (as I write), is no exception, containing some interesting new ideas that others will surely emulate.

Planview Enterprise 10.1 (PVE from now on) is Web-based. It works with Internet Explorer and Firefox browsers and has been built using both Silverlight and Ajax technologies.

When installed, PVE is configured to suit the customer's requirements without customising or changing the code. Later the client can reconfigure almost any aspect of the software and this doesn't affect the upgrade path of the code. The configuration remains unaffected by code upgrades. It would become tiresome if I detailed the areas of PVE's configurability so, henceforth, please take configurability as read.

Reflecting the current world

This version is positioned for the 'new normal'. The work environment has changed and companies must move forwards, change and become more adaptable and more dynamic. They can't wait for things to return to the way they were – they probably never will. This is the 'new normal'. Business strategies are different and these strategies now drive an organizations' plans, budgets and financial controls.

The new design of PVE is intended to help organizations translate their strategic plans into workable operational plans, connecting their financial control with their strategy and managing their critical resources – time, money and people.

It starts by capturing ideas and connecting them with the strategy. Let's imagine a customer has an idea for a product. This calls for a spell with PVE's 'Ideation' management module, which provides a structured framework for organizing and evaluating ideas and connecting them with the organizational strategy. It uses a Web portal to gather ideas and then uses the same Web 'audience' to review them. The 'cream' of these ideas is 'skimmed off' using evaluation and scoring methods and passed into the core PVE system.

Project Ranking Screen with bubble chart.

The Ideation system is provided through an OEM agreement with Brightidea, using their 'WebStorm'. Someone (internal or external) with an idea can log in (it's also iPhone compatible) and record that idea on the form provided.

Once you've logged in, you name your idea and describe it. Once you've entered its title, the system searches for other ideas with similar keywords in their titles and lists them for you. This helps to prevent duplicate ideas being entered and also cross-fertilises your ideas. It also gives you the opportunity to comment on those similar ideas from other people. You can attach files to your idea, categorise it and tag it with some keywords. When you hit the 'submit' button, the idea's added to the database.

Other people, logging in later, see this new idea listed under a 'Recent Submissions' heading. They can add their comments and vote to promote or demote the idea. The voting system can be customised so that certain people's votes are weighted up or down, dependent upon their company status and maybe their track record.

There's also a tab on this page to list the 'best' ideas and this can be configured to list those with the highest scores or scores above a certain level.

The person responsible for performing a detailed review of these ideas can then log in and move to a 'Switchboard' area to which only they have access.

Different WebStorms can be set up for different purposes, possibly accessed by other groups of people. However, the ideas from these different WebStorms can be fed up to the enterprise level and can be visible in the Switchboard list, or sent to alternative Switchboards for different evaluators.

Ideas are ranked according to their WebStorm rating on the Switchboard and a RAG indicator shows whether they're new, aging or old ideas. Also shown are the creator's name, the category they gave it and the idea's status. There's also a 'Detailed Evaluation' column (more about this later). The evaluator can send any idea to an evaluation team for their assessment and alternative sets of evaluation criteria can be set up for different types of idea.

Automatic e-mail alerts can be sent when someone comments on your idea or when an idea is sent to you for evaluation.

Evaluation team members would log in, go to their 'Action Items' area and select the new idea. They would open a summary page and from there can enter their own evaluation comments and scores. These are submitted and the scores translated into the Switchboard's Detailed Evaluation column previously mentioned.

Once an idea's completed its evaluation, the Switchboard owner can change its status. The status levels would typically include items like 'kill', 'pending' and 'activate'. If activated, the idea's transferred across to the main PVE area where it features as a 'Request'.

Someone with the role of 'Dispatcher' now picks up this request and decides whether it should become a candidate project, new product, strategy item or support ticket, or be linked with an existing strategy or project. A different workflow would be attached to each of these paths.

Next step

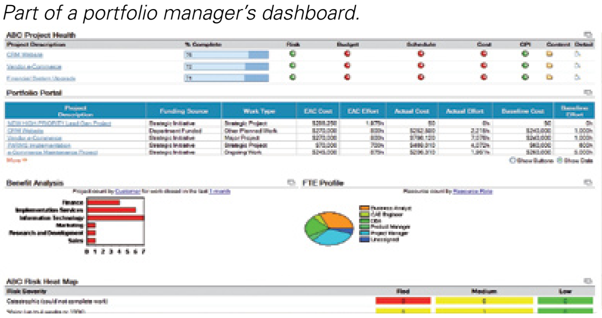
When an idea becomes a candidate project, its workflow takes it through a series of review and information gathering stages. After this process it arrives at the 'Investment Ranking' screen and is listed against a set of measures, metrics and costs where it's ranked and compared with other candidate and existing projects. This is a tabular display, but the same data can be displayed on a bubble chart, configurable as to the data used on each axis, so that the project can be compared under many different headings.

During the information gathering exercise, the candidate project is scored against various strategic headings using a weighted scoring mechanism. You can create one or more 'what-if?' scenarios to evaluate the effect of taking on this work. Its impact will be reflected in the portfolio costs, benefits and other metrics. You can change the budgets and the time allowed.

Planview's 'Operational Capacity Planning' functionality is now brought into play to establish whether there are people available to do the programme of work.

You open a 'what-if?' scenario in the Operational Capacity Planning area. A Gantt chart displays a bar for each candidate and project. Green bars denote accepted projects, light green conditionally accepted projects, orange bars denote projects still in analysis and grey shows refused projects. If you, for example, make one of the projects in analysis 'accepted' the effect on the workload is calculated and, in the lower portion of the screen, any resourcing problems in any period are highlighted with exclamation marks. Drilling into a problem project to see greater detail, shows you where the problems are. You can see which resources are overstretched down to individual level. Using this area you can change the duration of work, reassign work and resources and attempt to alleviate the problems. You can see the cost effect of the changes you're making, in real time.

Part of a portfolio manager's dashboard.



If a work plan has already been established, you can compare the 'what-if?' position you've created with the actual plan to see the effects of your actions. From this screen, you can drill into the project plan to examine the detail there.

You can save alternative scenarios and display them as bar or Gantt charts illustrating the metrics of particular interest to you. Once you've decided which scenario to run with, you 'promote' it, giving it the go-ahead. You may then decide to add further detail to the project plan if this is needed.

Keeping track

At any point in the process you might need to examine the position of this project in your overall release plan. A project may already have been associated with a product, or you may choose to do so at this stage. Opening the 'Product Roadmap' screen displays a list of products.

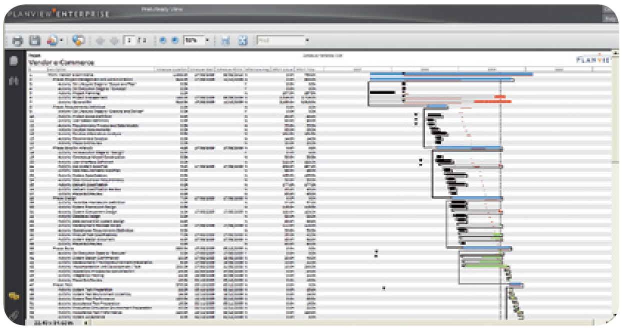
Each product is represented by a bar on the chart, with a product release date target shown as a star. The product dates are set manually by the product manager. Below that are separate bars for each project feeding into that product. The project bar dates don't drive the dates on the product bar, nor the target delivery date, but any difference between the product dates and the driving project dates is immediately obvious. Dashboard and e-mail notifications can be created to warn you if project dates are going to throw the product or release dates out.

The product manager's area of Planview holds a hierarchical structure detailing the organization's product framework. Against each product can be held an array of data that could include items such as market share, market growth rate, product life cycle stage and competitive advantage. This information is entered manually or, if it exists in an external system, it can be imported using Planview's 'Opensuite' of out-of-the-box connectors to link with other applications.

The information held in these arrays can be illustrated on bubble charts, comparing the different products, axis by axis. One of these charts, for example, (the BCG Product Portfolio Method) illustrates such things as growth rate and market share and divides the products into cash cows, stars, question marks and dogs.

Financial planning can be carried out, product by product, and budgets set and anticipated revenues calculated. Once the projects have been associated with the product, the budgets can be spread downwards and the costs rolled upwards meaning that a higher level of financial control is available in this version of PVE than earlier versions. Various comparison and variance reports can be viewed. Any tabular report that you can see on-screen can be printed, exported to PDF or Excel (from where it can be edited and re-imported).

A project Gantt chart.



Inidvidual controls

All users can have their own dashboard, either role-based, or individually configured, containing information of interest to them. The portfolio managers' dashboard may, for example, list the projects in their portfolios (all drillable) with RAG indicators and other illustrative graphs showing the status of various aspects of the project's health.

Part of the dashboard can be configured as a navigation portal from where you can access any other area of the system (depending upon your rights).

Forms can be set up to collect information (for example, project status) and the information collected can be used anywhere else in the system.

The Planview PRISMS offering contains a wealth of best practice information and workflows, including PRINCE2, PMBOK and Planview's own, based on twenty years experience.

Any workflow can be applied to your projects and a dashboard button takes you to the point in that workflow reached by any specific project. Based on the workflow, a set of notifications and alerts can be structured to guide users through the workflow.

Any set of budgetary, cost or revenue figures can be collected, calculated and monitored. They can be spread across the duration of the project and totalled and subtotalled any way you like. These figures can be entered at project level or can be rolled up from more detailed information entered at task or activity level.

Integral scheduling

Planview has a two-way integration with MS Project, but this doesn't have to be used as Planview has its own Web-based scheduling module. When configuring Planview you can define your own work breakdown structure and the scheduling tool can view this work breakdown structure from any level and also by slice, for example, projects from different programmes can be combined in other programmes for the purposes of display

The Gantt chart can be viewed at various levels of granularity. Dates are entered manually and connections between projects and tasks are entered via the toolbar. PVE has an inbuilt 'Manage Work' feature aimed at power users. Utilising this, a limited drag and drop capability is enabled in the Gantt chart but, as I write, this system area is being re-engineered using Silverlight and, hopefully, an improved drag-and-drop capability should make its appearance later this year.

Using the Gantt chart screen, the project manager can search for role-based, or named resources by skill and availability and assign them to tasks. The project manager can put together a detailed profile of the resource(s) required and search within the resource database or submit the profile to a resource manager for fulfilment.

During the early stages of a project, resources can be 'reserved' – not assigned to work immediately but reserved for use later in the project.

Risk, issue and change logs can be recorded at programme level and below (down to task level) and their details reported on and summarised on dashboards.

Reports

There are three areas of reporting not so far mentioned in this review. The first is the ability to produce a single page project status report. This is configured by the project manager and summarises what (s)he considers important about that project. Differently formatted reports can be configured for different projects.

The second is the ability to use external reporting software such as Business Objects, Cognos and similar reporting tools.

The third feature, – introduced about a year ago – is Planview's own 'Insight Analytics' with OLAP analysis capability. This functionality sits on a SharePoint platform and Planview utilises the free version of SharePoint included within SQL Server.

It can also be distributed through Outlook. When used with Outlook you'd have a series of mail folders each containing a different view of the data held in a PVE reporting 'cube'.

To each view, users (with access to a set of inbuilt reporting tools), can apply dynamic filters and controls that enable them to drill into the data, slicing, dicing and displaying it in the way they want – by time periods, by resource, by project and so on. The administrator configures the starting point view in each Outlook folder for each user or user role. Recipients of this information don't have to be PVE users. They don't even have to be part of the organisation, they could be customers needing specific information about their projects. At any point in the process the graph displayed can be exported into PowerPoint, Excel, PDF or e-mailed as a snapshot.

In addition to the project management functionality of PVE, there is also 'business as usual' or Service Portfolio Management functionality. This provides an organization with the ability to list and manage the range of applications used within their business area, choosing which are the most effective and which are no longer required, ensuring that the appropriate hardware and operational platforms remain available for their use and managing the costs involved.

Whilst there's an adequate workflow management system built into PVE there are occasions where a greater level of process management is required. In these circumstances the Planview Process Builder may provide the answer, enabling an organization to manage their enterprise-wide processes and featuring three pre-built configurations: requirements, gate and assessment management.

How much does it cost?

Pricing for Planview solutions is based on a number of factors and can range from £35,000 on the low end to an average of £120,000 for around a 200-user system. All prices exclude VAT.

Right to Reply

Thank you for your thorough review of Planview capabilities. You have described very well how Planview can support organisations in the 'New Normal'.

There are just two points that we would like to comment on:

1. The experience of many of our customers is that they like the current choice of methods available for manipulating and editing plans. We look continuously for ways to enhance capabilities and user experience and encourage customers to participate in this process. The Inner Circle programme enhancement of ManageWork exploiting Silverlight is one example of this.

2. The workflow built into Planview Enterprise has been proven to be flexible and powerful for supporting PPM processes. Increasingly Planview is used across multiple functions within an organization and this is where the additional Planview Process Builders (PPB) module comes into its own. For example automating the process of bringing on board additional resources would be triggered by a need identified by the project and resource manager and then will require HR and Finance processes to be invoked. PPB handles these pan-functional workflows in a very effective manner.

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