

# Planview Enterprise 10.3



**Steve Cotterell** returns for another look at Planview Enterprise – and finds that a number of significant enhancements have been made.

The last twelve months have been good ones for Planview. The company experienced record growth last year and has made an excellent start this year. CEO Pat Durban's new book, 'Taming Change' was published and, at the time of writing, has so far sold more than four thousand copies. Their flagship product, Planview Enterprise has undergone two new releases which, between them, bring significant improvements to the system.

The company is finding that Planview Enterprise (PVE) is increasingly used for portfolio management across entire organisations, rather than just in their IT departments. Enterprise-wide adoption from the finance department downwards, as opposed to the more traditional PMO up adoption, is becoming increasingly common and this release has been designed to assist with high level corporate financial planning.

PVE is not a set of modules bolted together, it's a single application designed specifically for portfolio management. When you install it, you install the full application. It's also highly configurable in almost every aspect so, from here on I'll save both my space and your patience by not labouring that point - please take this product's configurability as read.

At the highest level, PVE's Investment Planning Manager incorporates a scenario-based environment in which you assess the impact of starting new projects. Different scenario versions can be compared against each other so that you can see what differences there are in the metrics involved. You can also view the effect that your models would have on your entire portfolio and how they achieve your operational objectives from the financial point of view. If you decide to adopt a scenario in real life, it can be 'published to execution', at which time it becomes part of your plan.

You can also model a strategic planning structure and thereby ensure that the projects you're undertaking support the strategy of the organisation.

On the Review Strategy screen is shown the tree-like strategy breakdown structure - with each strategic mission being supported by a number of objectives. Each objective is fed by a group of strategic contributors and below those are listed the programmes that contribute to those strategies.

Highlight a programme on this screen and, in the lower half of the screen, you can see the projects in this programme - all drillable. The contribution that each project makes towards the strategy is measured as a percentage and this figure is utilised when data from this project is used to calculate the cost of the strategy. A built-in spreadsheet is used to calculate and roll up the strategic costs and benefits.

Top-down strategic target and budget setting can also be performed using this screen, the percentage figure being used to apportion the strategic budgets between the projects.

One of the most noticeable new features in this version is the addition of a new analytics and reporting portal, pulling all dashboards, analytical and reporting capabilities into one place. OLAP, real time and relational data can now be displayed on a single dashboard. You can create a set of dashboards, each illustrating a different business aspect of your portfolio. All dashboards have drill-down functionality and drag and drop customisation and configuration capabilities. Data can also be exported to RSS feeds, PowerPoint, Word, PDF, Excel, HTML and XML files.

A portfolio manager's opening screen might list the various portfolios he/she manages. Clicking on the line detailing a portfolio would take you to that portfolio's Home Page dashboard, containing a list of the projects in that portfolio and illustrating the performance and health of each project. From this screen you can get information about, and update, project status, attributes, lifecycle, budget, schedule, risks, issues, changes and resource profiles.

Clicking on a project's 'Lifecycle' icon displays a graphic illustrating the workflow steps containing information about each step, including its owner and completion date and showing where the project is in its lifecycle.

The 'Budget' icon takes you to a spreadsheet-like screen containing columns of financial information including benefit figures (profits, cost savings and investments) and costs including labour. Using this screen, you can perform high level benefit and cost forecasting. Different views of the plan can be compared against each other and with the actuals as the project progresses. Data from this screen can be exported to and imported from Excel.

**An enterprise PPM application that's making strides to becoming a powerful financial planning application as well.**

The system offers multi-currency support, allowing areas to use local currencies and converting their figures into a system currency for global reporting.

The project level figures can be rolled up, either manually or automatically, to portfolio level and figures entered at portfolio level (like budgets) can be apportioned down through the projects in that portfolio - according to a percentage basis that you can set.

Once you've created a detailed resource plan for a project, you can use the scheduled effort in that plan to update your resource cost figures.

The 'Schedule Manager' icon leads to the project Gantt chart. The last time I reviewed PVE's Gantt, I criticised its usability. It's been redesigned and rebuilt using Microsoft Silverlight technology giving better usability, performance and scalability. It loads three times faster and can handle projects up to seven times larger than the previous version (Planview's figures).

Task dates and durations can now be set using drag and drop techniques. Dependencies are displayed but must still be entered manually. Multiple bars can be selected for common editing. Click on a task and its details are available via a set of tabbed forms at the foot of the chart - covering dependencies, resourcing, costs and so on. Bar colouring is automatic, based on the critical path, and you can't change the font and bar formatting or colouring.

PVE's support for MS Project has been re-engineered. A toolbar now appears in MS Project that allows data to be pulled from, and put back into, PVE without having to open it. The old MS Project system allowed you to check out an MPP file and then check it back in again. This can still be done, but the new toolbar allows you to open the PVE project within MS Project. Any existing resource assignments in PVE are brought across, and you can add resources, either by name or by role, from the PVE database, whilst in MS Project.

New tasks and phases can be added and resourced. The resource assignments can be validated against PVE and then the resourcing information can be sent back to the PVE database.

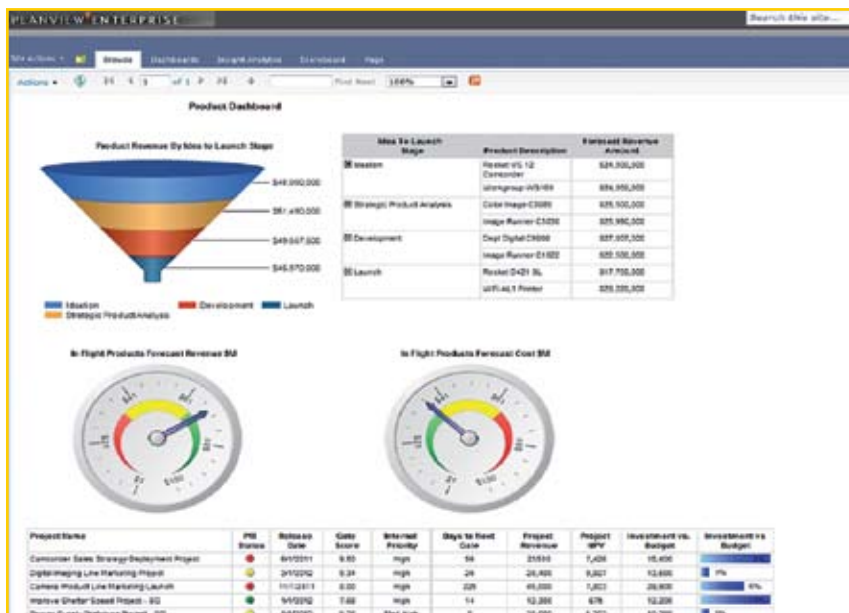
PVE's Operational Capacity Planning functionality has been enhanced, and now incorporates scenario planning and modelling. Using a screen showing the organisation's committed and pending (pipeline) projects, you see what effect bringing a new project into your committed set of projects would have on your resource capacity. You can display a list of your resources and watch any overload(s) caused by the new project appear. Drilling into the line illustrating an overloaded resource, you can see which projects this resource is working on and exactly which projects are affected by the work overload. You can then model shifts in the dates of the work to see if the overload can be levelled. You can also try moving resources, using spare capacity from other areas.

A resource manager would have a set of virtual portfolios but, instead of containing projects, these would be portfolios of people. Some portfolios might be shared with other resource managers and some might be 'owned' by just one resource manager. People could be listed in several portfolios simultaneously.

The resource manager's Home Page would show the utilisation and capacity of his/her team, drillable by roles and individuals.

The 'Resource Assignment Manager' has also been rebuilt with Silverlight technology and can now handle 33 times larger portfolios and is thirty times faster loading. This is a collaborative workspace, used by resource and project managers to calculate the optimum use of their resources. From here, you can search for a resource with a certain set of skills and the time available to accept the work, either by role or by name.

**The 'Resource Assignment Manager' has also been rebuilt with Silverlight technology and can now handle 33 times larger portfolios and is thirty times faster loading**



One of Planview's new-style dashboards

**An increasing number of their customers are adopting product portfolio management**

A what-if scenario lets you see the result of assigning specific resources to a piece of work. You're shown what work these resources have already been assigned to and what effect this further assignment would have on their workload. Because this is a what-if area, you can experiment by substituting people and moving tasks to discover the best solution without making any permanent changes.

Once a resource has been assigned, that work automatically appears on their timesheet, allowing for the collection of actual effort data.

Planview tells me that an increasing number of their customers are adopting product portfolio management. The product manager's Home Page might show a growth share matrix bubble chart showing the position of the various products within the portfolio - be they 'cash cows', 'stars', 'question marks' or 'dogs'. Any of the products on this chart can be drilled to view their details.

The products are displayed in a 'product breakdown structure' hierarchy of product types. At the bottom of the hierarchy are the products themselves and the sort of information held about a product (in columns against the products' names) might include its relative market share, target market, growth rate, launch date and status.

At the base of the Product Manager screen (containing this list) is an area that shows information about the product highlighted in the list. One of the tabs on this form, 'Associated Work', lists the projects that contribute towards the development of this product. A project may contribute towards more than one product: the strength of its link with a particular product is expressed as a percentage.

An alternate view of the hierarchy shows financial information about each of the products. This data, which includes projected revenue and costs, is partially extracted by the system from the data held about the projects associated with the product, using the percentage figure to calculate the proportional values. Other values are entered manually.

Different screens containing other column layouts can be

established to provide alternative views of product data. Products can now be grouped into releases and a single release may contain several products.

Using the Products Release Management screen, you name the releases, which can be sorted into categories, and enter basic information. It's up to the user organisation to decide on the level of detail to be captured about each release.

All of the release management information comes together on the Product Roadmap Gantt chart. On this chart are listed, as blue bars, the various products. The release date of each product is indicated by a red star. Below each of the products are a set of green bars, each representing a project contributing towards the product's release.

The principal enhancement made to this roadmap is that project activity information, down to its lowest level, can now be shown below each project bar. Another improvement is that you can now group products by any product attribute.

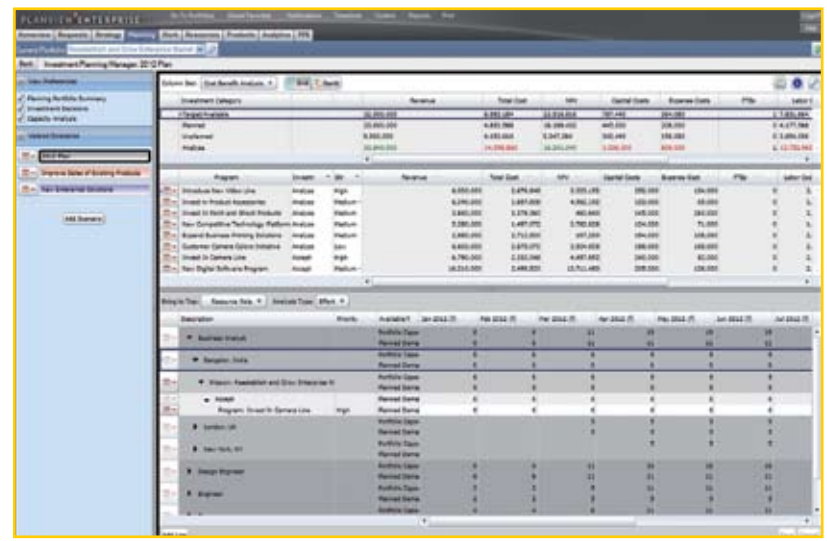
A new 'Sustainability Portfolio' aspect has been added to PVE's 'Brand Impact' functionality. Built in partnership with Strategic Harmony Partners, the Brand Impact function analyses what changes the project may cause to brand perception from a competitive impact point of view.

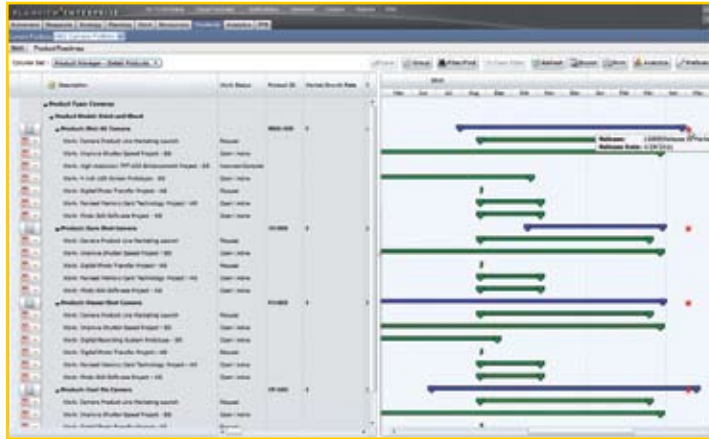
The new sustainability element introduces a 'green issues' factor into the analysis and allows the impact of the project to be analysed against issues such as energy and water conservation, the minimisation of greenhouse gasses, and so on.

Workflows, have been introduced to manage the handling of changes, risks and issues. Once you've entered the details of the change (risk or issue), the workflow path kicks in to obtain any additional information that the organisation deems necessary. Priorities and impacts can be set and the route through the workflow based on these criteria.

The workflow might forward the change request to its owner, who would get an on-screen notification and possibly also an email alert. Having read it and possibly commented on it, the owner might forward it to an approver.

**The Investment Planning Manager screen**





The  
Product  
Roadmap

Once approved, a schedule can be set for the work to be done and the change to be costed. When the change has been completed, the workflow can ensure that quality control procedures are carried out.

Integrated video conferencing, chat and email is available within PVE, using Microsoft Communicator technology. All dashboard data can be communicated using this system.

Several new processes have been added to PVE's Process Builder, providing enterprise-wide processes for deliverables management, financial planning and SharePoint management.

Support for iPhones, iPads, Androids and newer Blackberries is available and workflow steps and resource assignments can be approved on the phone. An iPhone app has been introduced to support the PRISMS collaboration and best practice knowledge base system. Other apps, to handle operations such as timesheet approval are in the pipeline.

Planview PRISMS (hereafter, PRISMS) best practices and e-learning programs are included as part of the PVE fixed-price implementation packages, or via license for the full catalogue. It's a single portal that enables customers to access best practice guidance, product documentation, discussion forums and e-learning.

The best practice guidance in PRISMS is the sum of twenty years experience from Planview and its customers. Its advice and templates therefore contain elements of PRINCE2, SIGMA and other recognised methodologies, but it doesn't follow any recognised methodology to the letter - it's Planview's own system.

PlanviewPRISMS.com is an open forum, but individual customers can own private areas into which they can place their own best practice material and 'enablement paths'. Planview education includes on-demand e-learning and an 'enablement path' is a set of training courses and materials designed to equip an individual to fulfill a specific role within PVE. A client may decide that a new employee must complete a specific enablement path prior to assuming a new role.

Other PRISMS features include 'Ask the Planview Expert' – webinar discussions with a Planview instructor and customised e-learning modules that deal with a customer's own processes, which can be supplied by Planview at additional cost.

## How much does it cost?

Pricing for Planview Enterprise is based on a number of factors and currently ranges from £55,000 on the low end to an average of £120,000 for around a 200-user on premise system. SaaS is an increasingly popular option with the total cost working out at about the same as an on premise solution over a three year period. Planview always recommends that Planview PRISMS is deployed and this is included in the above prices. 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 the portfolio management needs of an entire organisation, serving the CFO, CMO and COO as well as the CIO.

One key area that we would like to reinforce is adoption: Planview PRISMS provides valuable assets for achieving adoption of portfolio management within an organisation. PRISMS enablement includes best practices, processes, e-learning, classroom and virtual training as well as PlanviewPRISM.com - the portal through which Planview customers access a wealth of role based, process centric capabilities to help them succeed.

As well as experience built up over a twenty year period, continued investment in the content, approach and technology used to deliver PRISMS has made PRISMS a key differentiator for organisations selecting a partner for implementing portfolio management.

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