

# Product Datasheet

## INSIGHT ANALYTICS

### Extend the Data in Planview Enterprise Throughout Your Organization, Delivering Vital Business Information to Every Desktop

The only solution of its kind, Insight Analytics puts the information you need at your fingertips and lets you share it via Microsoft Office applications like Outlook and SharePoint. Interact with dashboards that roll up the most granular data to make strategic decisions about demand, resource and financial management, based on real-time information. Know the true cost of services and applications, the resources dedicated to innovation versus sustaining work, whether to outsource, and more.

#### Extending the Benefits of Planview Enterprise

The Planview Enterprise suite offers robust portfolio management applications that leverage a vast amount of business-critical data stored in a shared database. This data can drive action by decision-makers, but only if they have access to, and can draw conclusions from, the underlying information.

Planview Enterprise Insight Analytics helps you access the broad, multi-dimensional data in Planview Enterprise in a new, highly interactive way.

#### Interactive Decision-Making Platform

Perform analysis of complex data sets quickly through interactive drilling, what-if scenarios, and trend analysis. This powerful, OLAP-based analytics platform provides an intuitive user interface with drag-and-drop and pivot table-like capabilities. Drill down, slice and dice the data, and change views—all with a click of the mouse.

#### Easy Sharing Across the Enterprise

Tightly integrated with Microsoft Office, and built on the Microsoft Windows SharePoint Services framework and SQL Server Analysis Services, Insight Analytics speeds adoption by making it easy to distribute information, even to those without direct access to Planview Enterprise.

#### Simplified Organizational Collaboration

Insight Analytics makes it easy to share information to improve collaboration and speed smart decision making for both IT and Product Development groups, including roles such as:

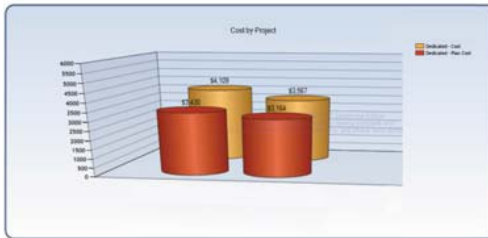
- *C-level executives* who can quickly absorb the relevance of rolled up, enterprise-wide data by viewing key metric dashboards in SharePoint portals and prescribe a course of action utilizing Outlook
- *Product and business managers* who can analyze financial and non-financial Key Performance Indicators to help the organization define and measure progress toward organizational goals and strategic alignment
- *The strategic steering committee* (IT Portfolio Management Office or product lifecycle gatekeepers) who can use views imported into Excel to further manipulate and analyze trend analysis data

And each of these can share analytics and recommended actions with other stakeholders across and beyond the enterprise via e-mail and PDF documents.

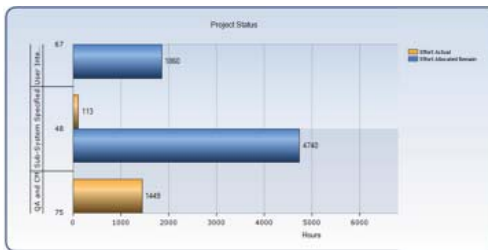
*One-click access to the data you need...*



*...from KPI gauges...*



*...to high-level views...*



*...to granular details.*

### Planview Enterprise

Planview Enterprise® Insight Analytics is an integrated component of Planview Enterprise, a market-leading portfolio management solution. Portfolio management helps you optimize your business by balancing strategy against scarce resources – people and money. Other components of Planview Enterprise include Enterprise Portfolio Management (EPM) for strategic planning, Project Portfolio Management (PPM) for managing projects and resources, Product Portfolio Management (PdPM) for maximizing the market impact of products, Service Portfolio Management (SPM) for managing the total cost of business service delivery, and Business Process Manager (BPM), for improving organizational performance and requirements auditability. A flexible, interactive analytics platform, Insight Analytics extends the value of Planview Enterprise by enabling better decisions made faster.

### Planview Enterprise Insight Analytics empowers IT and Product Development to:

- Drive informed action using interactive analytics to quickly visualize key business information
- Disseminate information to every desktop through tight integration with Microsoft Office and SharePoint
- Generate immediate value with pre-built analytics and dashboards
- Be ready for future needs with a flexible, extensible, OLAP-based design
- Realize fast ROI with an intuitive platform that minimizes learning curves

**Insight Analytics gives you fast answers to questions like:**

- How much do I spend on innovation versus sustaining work?
- What is the cost of delivery of a service or application, and who is paying for it?
- Over time, are my costs increasing or decreasing?
- Are my resources doing the right work?
- Would outsourcing be more cost-effective?
- Do I have the right balance of onshore to offshore resources?
- With which vendors are we working, and what is the cost of each?

**Powerful Out-of-the-Box Analytics**

Pre-built OLAP cubes access all the data in Planview Enterprise applications so you can get started quickly.

Insight Analytics ships with guided analytics and interactive dashboards for:

- **Strategies** — analyzes top-down strategic plans against bottom-up execution by mapping organizational strategies to financial plans, resource capacity and investment costs
- **Work Management** — enables analysis of priorities, status, forecasts, baselines, financials, and risk for projects and activities
- **Resources** — provides a view into your organization’s resources and contractors, ensuring they are executing on the right work, strategies, and applications based on availability and hours worked, planned, and forecasted

Several pre-configured OLAP cubes are specialized to address the needs of:

**IT Organizations**

**Total Cost of Ownership** – offers cost transparency and key performance indicators into IT, so you can analyze all application, service, and innovation costs, and validate allocation of IT costs to the business

**Services** – spells out the total cost of delivering IT services by enabling you to analyze services, assets, applications, and service level agreements

**Vendors** – relates costs to vendors for applications, services, and work to ensure you are spending appropriately

**Product Development Organizations**

**Total Cost of Development** – delivers cost transparency and key metrics for the entire product breakdown structure or individual products

**Product Portfolio Analysis** – offers views into products within user-defined portfolios by corporate and business unit strategies, brand alignment, and lifecycle gate and status

**Vendors** – vendors and strategic partners can be listed and grouped to determine their impact on the portfolio of products

Prebuilt OLAP cubes, and cubes you easily configure to your needs, quickly generate actionable analytics.



**Flexible Extensibility**

The Planview Enterprise Insight Analytics platform enables organization-specific analytic views. Extend the OLAP technology to adapt to your specific processes and controls; add new analysis for lines of business, product lines, justifications, geographic locations, and more, easily and flexibly.

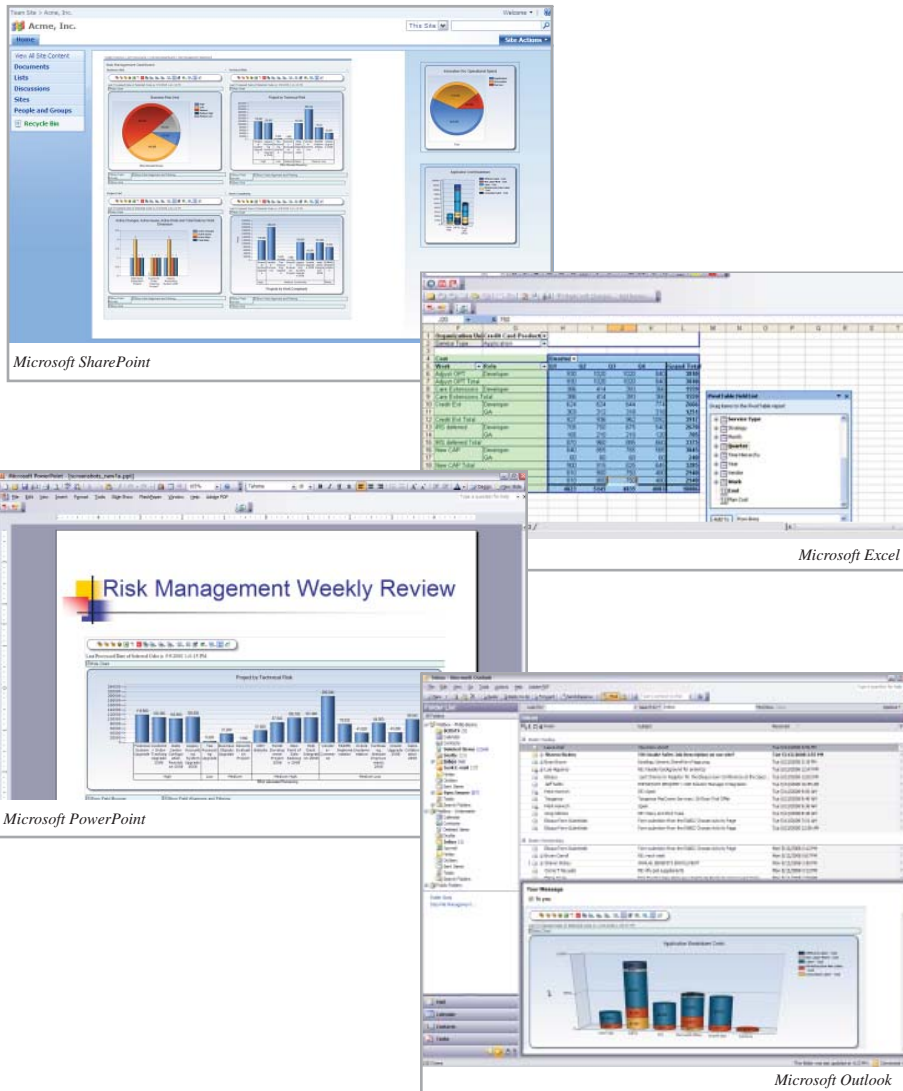
**Granular Security**

The role-based security integration of Insight Analytics with Planview Enterprise ensures the right people have the right level of access, easing complexity in securing business information.

## Sharing Across and Beyond the Enterprise

Insight Analytics makes it easy to share information to improve collaboration and speed smart decision-making by allowing you to extend the rich data in Planview Enterprise throughout—and beyond—your organization.

Built in the Windows SharePoint Services framework and tightly integrated with Microsoft Office, Insight Analytics lets you share information via these applications:



## The Power of Insight

Easy to use yet robust, Planview Enterprise Insight Analytics delivers a powerful new experience for stakeholders across the enterprise to view and interact with business-critical data supporting your Planview Enterprise applications. From click-by-click access to critical information, to user-friendly chart views, to easy sharing via Office applications already in use, this dynamic platform delivers the power of insight, enabling you to take informed action and generate positive impact for the entire organization.

To learn more, visit [www.planview.com/analytics](http://www.planview.com/analytics) today.



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](http://www.planview.com).

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## INSIGHT ANALYTICS OVERVIEW

FUNCTION	DESCRIPTION	BENEFIT
INTERACTIVE ANALYTICS	Provides a customizable, interactive, extensible, and intuitive user interface supporting all the data of Planview Enterprise through interactive drilling, what-if scenarios, and trend analysis – utilizing the power of OLAP technology	<p>Drive better decisions faster</p> <p>Improve enterprise-wide communication</p> <p>Speed adoption with easy to use interface</p>
FEATURE	ADVANTAGE	
HOME	Provides one centralized place to quickly access all created and viewable dashboards, interactive analytics, and OLAP views	
INTERACTIVE ANALYTICS	Enables users to configure and/or explore analytics, presented in a chart or tabular layout, by drilling down into potential issues that require focused attention and action	
INTERACTIVE DASHBOARD	Offers quick visuals into all the data of Planview Enterprise with single-click dashboards that expose information the way business users need it, allowing them to respond effectively to time sensitive problems, trends, and issues	
KEY PERFORMANCE INDICATOR (KPI) GRID	Enables users to configure and analyze KPI values, goals, statuses, trends and gauges for all financial plans in Planview Enterprise	
KPI GAUGE VIEWS	Delivers user-specified, dynamic KPI gauge views for programs or projects that warrant specific attention based on strategic importance	
OUT-OF-THE-BOX ANALYTICS	Address many of the common needs and scenarios users face every day, with pre-built OLAP cubes for analytics include Total Cost of Ownership, Total Cost of Product Development, Work Management, Resources, Strategies, Vendors and Strategic Partners, and Services	

FUNCTION	DESCRIPTION	BENEFIT
MANAGE ANALYTICS	Provides a comprehensive analytic tool center for creating and managing interactive dashboards, analytics, and OLAP views	<p>Easily manage and create interactive analytics</p> <p>Improve productivity</p>
FEATURE	ADVANTAGE	
OLAP VIEW	Enables building of configurable, business-ready visuals in an ad-hoc, intuitive, and analytical environment	
CREATE WEB PART PAGES	Provides pre-formatted SharePoint Web part pages to allow for quick Web part integration and layout for interactive dashboards , analytics, KPI grids, and KPI gauge views	
PUBLISH WEB PART PAGES	Enables publishing of interactive dashboard and analytic Web part pages in a streamlined manner	
PUBLISH MY VIEWS	Enables publishing of individual OLAP, KPI Gauge, and KPI Grid Views to other analyzer users	
BROWSE CUBE IN EXCEL	Enables the use of desktop tools like Excel to open and view OLAP data with pivot tables and graphs	

FUNCTION	DESCRIPTION	BENEFIT
MY FOLDERS	Provides a personal content area for all analytics that a user creates and views in the application	Speed adoption through personalization
FEATURE	ADVANTAGE	
MY OLAP VIEWS	Provides a list of all a user's specific OLAP views, including personalization (chart types, backgrounds, font size, etc.) that have been created or published	
MY KPI GAUGE AND GRID VIEWS	Provides a list of all a users's specific KPI gauges and grid views that have been created or published	
MY DOCUMENTS	Provides a list of all a users's specific KPI gauges and grid views that have been created or published	
MY WEB PAGES	Provides users with a single-click function for accessing all their created and published interactive dashboard, analytic, and KPI Web part pages	