

Product Datasheet

PLANVIEW PROCESS BUILDER

Integrating Extensible Process Management into Portfolio Management

Your organization's business change initiatives are dependent on the design and maturity of your business processes. Adopting good business processes is therefore essential to improving organizational efficiency – but it can be difficult to spur process adoption and harder still to measure process value.

The Planview Process Builder™ product line meets your demands, 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:

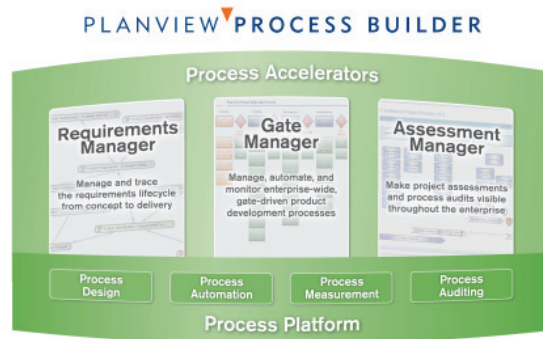
- requirements management
- product development
- quality management
- financial compliance
- meeting regulatory requirements
- IT governance

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

Open Process Platform

Using the open platform of the Planview Process Builder, you can easily manage complex business processes in a single end-to-end view. Reach process excellence and solve real business problems through adoption, compliance, and continuous improvement of processes, be they custom or standard.

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



Flexible Process Design for all your Processes

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

Use Planview Process Builder to build extended applications supporting broad business requirements. Your processes, and the supporting forms, reports, and data, can be easily defined, modeled, and modified using extensive yet easy-to-use configuration tools and drag-and-drop process editing tools. Easily adopt your organization's brand standard look and feel to Planview Process Builder, further spurring adoption by giving all process stakeholders a familiar, user-friendly environment in which to operate.

Design and model your processes in Planview Process Builder, regardless of whether they are custom or based on industry guidance, such as Planview PRISMS®, ITIL®, PMBOK®, CMMI®, Six Sigma®, Stage-Gate®, PRTM® PACE®, or any processes in use in your organization.

Process Automation for Operational Efficiency

Create a comprehensive view of business processes across applications, and operational efficiencies are realized through the capability to automate routine tasks

Planview Process Builder is extensible to enterprise-wide business processes, creating a single comprehensive view of business process across applications. Operational efficiencies are realized through its aggregate view and its capability to automate routine tasks using existing software applications. The automation provides a guide to the phases, gate reviews, and key deliverables associated with a process.

Planview Process Builder

The Planview Process Builder product line enables enterprises 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, Process Automation, Process Measurement, and Process Auditing. On this foundation are the Planview Process Accelerators, pre-configured best practice templates that support specific business needs: Requirements Manager Process Accelerator provides the functionality to capture, manage, link, route, trace, and audit product requirements through their lifecycles, Gate Manager Process Accelerator manages, automates, and monitors gate-driven product development processes, and Assessment Manager Process Accelerator, which empowers teams to make project assessments and project audits visible throughout the enterprise.

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 adoption, control, tracking, and audit of processes within the PPM framework
- Realize operational efficiencies with single view of enterprise-wide business processes
- Easily define, model, and build processes in your corporate style
- Improve process maturity and efficiency demands with automation
- Support auditing and compliance needs performance measurement

The **#1** answer to

What are your top innovation plans in the new economy?

Make business processes more efficient.

- 2009 InformationWeek Analytics Survey of InformationWeek 500 Executives



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, and Planview Process Builder™, for process modeling and management, 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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Process Measurement Supports Auditing and Compliance

Track the level of compliance to process and report information including how well processes are being followed, as well as capturing exceptions for analysis and audit purposes

Support auditing requirements, increase accountability, and glean the benefits of organizational process maturity. Planview Process Manager enables you to track and report on the level of process compliance, including which processes are being used, which are not and why not. In addition, it monitors review decisions – what decisions were made by whom and when, as well as the justifications for making the decisions – complete with agendas, meeting minutes, and actions. These reviews provide key indicators of the efficacy of organizational processes.

A complete history is maintained for analysis, accountability, and audits. Previous versions of data are maintained and may be viewed as they appeared at any time in the past, with complete histories of who made which changes when. Tabular reports can be used to gain insight into how processes are being used, including data on how long processes remain in which states. Tabular reports may be exported, sorted, reformatted, and queried. How process usage changes over time is essential to understanding trends in process adoption; because all data is fully versioned, charts can easily be viewed as a time series. Export any process measurement data for further analysis in HTML, XML, or other formats for use in other applications. Further, integration with Microsoft® Outlook® enables information to be sent easily via email, from which a user may log back into the relevant section in Process Builder.

Process Adoption Improves Outcome Consistency

A common, user-friendly interface to model and manage processes supports adoption, and business processes change from static documents to active guides to improve the consistency of outcomes

Planview Process Builder makes organizational processes available to all stakeholders, establishing them as a visible guide to the work that has been and needs to be done. Business processes change from being static documents to become 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 making them into an active guide to day-to-day work, while increasing adoption of processes by making them readily accessible and usable. Stakeholders can link into Planview Enterprise and third-party applications from Process Builder processes, and can also link directly to any document such as Microsoft® Office® documents or even image files, for immediate access, versioning, and distribution.

Planview Process Accelerators

For control and tracking of processes to manage procedural, regulatory, audit, and other requirements

On the foundation of the Planview Process Builder platform are the Planview Process Accelerators™. Each of these pre-configured best practice templates is developed to support specific set of needs:

Planview Requirements Manager Process Accelerator

The Requirements Manager Process Accelerator provides the functionality to **capture, manage, link, route, trace, and audit product requirements** through their lifecycles, from concept to delivery. Planview customers who leverage this Process Accelerator are seeing an increased ability to track requirements to pass audit reviews, improved confidence that the products they bring market meet customer expectations, a cut in costs related to tracing requirements, more visibility into which features are included in the product roadmap, and reduced risk of losing needed functionality.

Planview Gate Manager Process Accelerator

Applicable to Stage-Gate, PACE PRTM, and internally developed gated processes, the Gate Manager Process Accelerator helps product-centric and application development teams to **manage, automate, and monitor gate-driven, development processes**. Using this Process Accelerator, Planview customers are able to significantly reduce time and costs associated with chasing down gate status from various, often geographically distributed, team members, and by automating their gate processes. Customers who have implemented this Process Accelerator report seeing decreased risk by ensuring only qualified projects pass gate reviews, improved visibility into status of processes and associated regulator documents, and reduced compliance and audit costs.

Planview Assessment Manager Process Accelerator

The Assessment Manager Process Accelerator empowers project and process teams to **make project assessments and project audits visible throughout the enterprise**. This is critical for organizations **focused on regulatory matters such as Sarbanes-Oxley compliance**, which need to model processes in accordance with both users' needs and regulatory requirements. Planview clients who have implemented this Process Accelerator have recognized a decreased cost of tracking compliance, reduced training spend by modeling processes in the Process Accelerator, and a cut in audit costs by having a clear and easy method by which to trace the audit trail for all processes and related decisions.