

# What's New in Planview Enterprise 11.5

With insight from more than 100 customers participating in Inner Circles, the latest release of Planview Enterprise® 11.5 advances the portfolio and resource management discipline by adding analytics innovations and introducing business capabilities as a core dimension to portfolio analysis.

Planview Enterprise 11.5 delivers:

- Next generation ribbon embeds the RPM Analytics reports catalog and custom reports for line of sight portfolio analysis
- New data visualization with Microsoft Power BI
- New business capability dimension brings a new dimension to portfolio and resource management
- Group Projects and summarize financials in real-time
- New organizational resource pivot brings department and role planning into Resource Management and Assignments
- Initial integration between Troux® and Planview Enterprise – managing the strategy and business of IT
- Enhanced integration between Planview Enterprise and Projectplace™ to manage work and resources – No Matter How You Work™

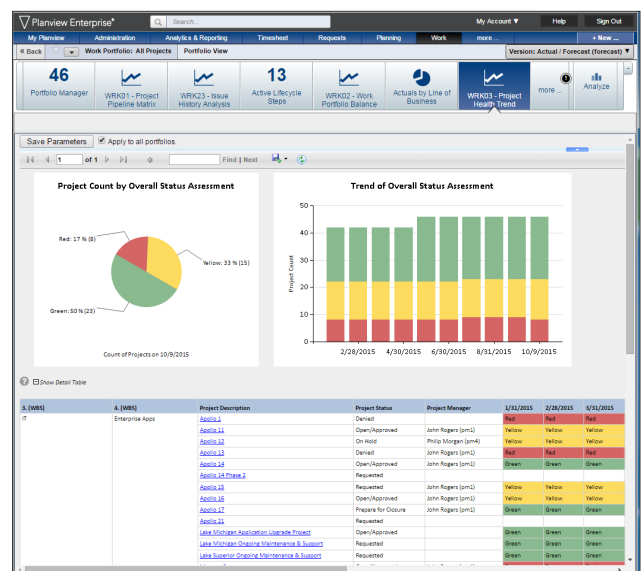
## Extending the Power of the Ribbon to Include Reporting

Planview Enterprise 11.5 brings reports closer to users than ever before. The next generation ribbon has KPIs, metric, notifications and now embedded reporting all in one place. Instead of having to access the Analytics and Reporting Portal, end users can conveniently review all their reports including RPM Analytics, in the ribbon, promoting proactive decision making.

## Reports Now Available as Tiles

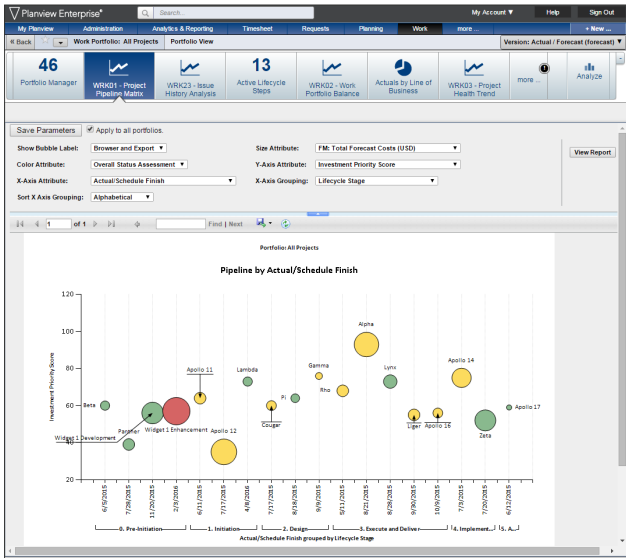
Reports, formerly only accessible in the Analytics and Reporting Portal, are now only a click away – embedded within the ribbon as tiles.

Report access uses the familiar tile metaphor, introduced with Planview Enterprise 11, standardizing how users consume all information across Planview Enterprise. Administrators can build the best user experience for each user group by setting up where reports are available and defaulting key parameters.



## Enhanced RPM Analytics Embedded into the Ribbon

Reports from the RPM Analytics catalog are now available as preconfigured tiles. The reports have been optimized for the ribbon, with consistent updated styling and an improved information layout. With Planview Enterprise 11.5, RPM reports are now released with every major Planview Enterprise version.



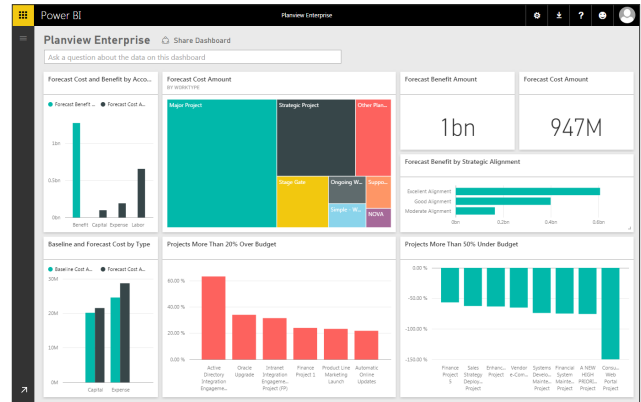
## Streamline Report Configuration and Distribution

With reports now available through the ribbon, sharing and administration becomes much simpler. Using the existing, flexible ribbon and tile configuration capabilities, administrators can share reports with default layouts and control access with security features. Planview Enterprise 11.5 allows administrators to represent how security features are used by renaming them. (See Additional Enhancements – Renaming user security features for more information).

## New Data Visualization with Microsoft Power BI

Based on our ongoing commitment to provide customers with easy ways to access and analyze their data, Planview Enterprise 11.5 introduces a new way to visualize, interact with, and understand your portfolios. By leveraging the Microsoft Power BI platform, Planview Enterprise delivers new highly interactive analytics and dashboards with deep insight into your projects and financials.

The Planview Enterprise Power BI Content Pack gives users access to information in an easy to understand, highly interactive data visualizations. Clicking through the dashboard displays interactive reports for the user to explore and understand both past, current, and future performance from multiple perspectives. Analysis is faster than ever and accessible anywhere you need it, be it on your laptop, mobile phone, or tablet.



Highlights include:

- Out-of-the-box access to project and financial performance and forecasts
- Visualize information with insightful business-oriented dashboards
- Interact with and analyze information in an easy, business-driven approach emphasizing self-service
- Access dashboards and reports anywhere – traditional browser, tablet, or mobile phone
- Investigate by asking questions in your business language and seeing results in real-time
- Connect your Planview Enterprise information with other applications through additional Content Packs, allowing users to perform their analysis across multiple applications. (Connect with a growing list of common enterprise applications, such as salesforce.com and Marketo, are available directly from Power BI)
- Perform integrated analysis across all resource and work management use cases by connecting Planview Enterprise content with soon to be released Troux and Projectplace content packs

## New Business Capability Dimension for PPM

Organizations need to link both their strategy (where are they going) and business capabilities (what your organization does at its core). Planview Enterprise 11.5 adds a business capability dimension to extend portfolio planning and management. Organizations can now optimize human and financial resources by both business capabilities and strategies.

- New business capability primary structure defines the hierarchy of capabilities within your organization
- Associate projects to one or more capabilities, allocating planned and actual costs by percentage

- Filter work portfolios by capability to focus on projects related to a single or multiple capabilities

Name	Projected Costs - FM	Projected Benefits - FM	Labor Cost	Net Benefits
ME Business Capabilities	23,320,203.92	28,465,417.00	23,891,803.80	12,855,123.20*
Customer Service	10,746,983.03	13,465,967.80	9,917,717.23	2,756,984.17
Customer Subsites	8,230,907.82	8,393,383.70	6,749,880.02	2,122,488.98
Work - Vendor e-Commerce	50.00 %	2,756,233.52	1,341,754.82	2,386,305.92
Work - Portal Development Project	20.00 %	3,451,144.08	6,441,039.20	2,262,796.46
Customer Retention	4,516,185.52	5,132,354.10	4,287,917.92	917,476.29
Work - Vendor e-Commerce	50.00 %	2,756,233.52	1,341,754.50	2,386,305.92
Work - Portal Development Project	10.00 %	1,718,872.08	3,223,769.80	1,864,627.88
Supply Chain	14,794,202.08	24,394,442.20	14,133,596.46	10,190,246.23
Marketing	1,721,424.08	14,463,289.20	7,265,474.46	6,712,174.52
Learn-Info-Customer	1,718,872.08	3,223,769.80	1,861,863.20	1,364,102.68

## Work Portfolio: Group and Summarize Financials

Project and portfolio managers can analyze projects grouped by key attributes (any single or multi-select work alternate structure) such as work type, status, gate, market, brand, business capability, etc. Project financials are summarized across the attributes, giving users up-to-date totals for cost, benefit, and effort by each value. For example, understand actual costs by work type, review planned capital expenditures by lifecycle stage, and monitor total costs by cost center, all in real-time.

## New Organizational Pivot to Resource Management and Assignments

The depth and usability of the resource management and assignments page, introduced in Planview Enterprise 11.4, is now available for organizational resources. Resource managers can now manage capacity, demand, and utilization by individual, department, and role.

Name	Work Name	Work ID	Internal Priority	8/1/2015	9/1/2015	10/1/2015	11/1/2015	12/1/2015	1/1/2016
Business Analyst				6.41	6.81	5.06	4.56	6.41	3.96
Requirements to Fill									
A NEW HIGH PRIORITY Project	A NEW HIGH PRIORITY Project	0000319	1 - High			0.11	0.11	0.11	0.11
E-Commerce Platform Enhanc...	E-Commerce Platform Enhancement Ph	0000332	1 - High		0.11	0.11	0.11		
MEC Implementation Project	MEC Implementation Project	0000730	2 - Medium		0.21	0.21	0.21	0.11	
New Project Request	New Project Request	0000346	1 - High	0.11	3.01	3.01	3.01	1.01	
Finance Project #6	Finance Project #6	0000358	1 - High				0.31	3.01	3.01
Bob Adams				0.21	2.11	0.81	0.51	0.51	0.51
E-Commerce Maintenance Proj...	E-Commerce Maintenance Project	0000020	5 - Low	0.11					
Infrastructure Support					0.51	0.51	0.51	0.51	0.51
Requirements Analysis	E-Commerce Platform Enhancement Ph	0000332	1 - High	0.61					

Specific functional enhancements include the ability to:

- Utilize a new "organizational resources" pivot within the resource management and assignments page that groups both staffed and unstaffed demand by department and role

- Investigate department and role level demand with direct visibility to the specific unstaffed demand (requirements) as well as the specific resources and their assignments
- Fill unstaffed demand (requirements) from within the resource management and assignments page
- Balance unstaffed and existing demand by directly editing existing resource assignments
- Filter assignments via a specific date range to support both the planning and management of resources in your period of interest

## First Integration Between Troux and Planview Enterprise

Forging a vital link between enterprise architecture (EA) practices and project management offices (PMOs), Planview Enterprise 11.5 provides the first integration to Troux, delivering a unique solution for connecting strategy and execution to more effectively optimize resources and drive transformation initiatives.

By integrating capability and technology management from Troux products with portfolio and resource management in Planview Enterprise, the integration gives technology leaders a consolidated planning and management environment. As a result, enterprise architects and PMOs can work together more effectively to execute business initiatives, make more informed portfolio decisions, and ultimately help technology organizations achieve strategic, organizational, and technical goals.

There are two key components for this first generation integration:

- Ability to assess potential projects
- Evaluate, measure and communicate by capability

## Conduct Project Assessments

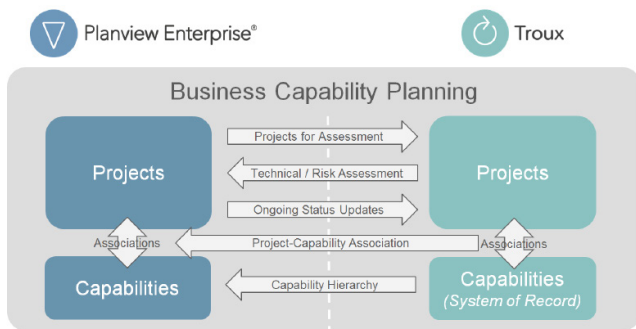
By integrating demand management and portfolio planning in Planview Enterprise with technical assessments from Troux, organizations make better decisions with a more complete picture of each investment and assess the potential to impact the business. IT organizations can ensure that all new demand is properly analyzed and understood before going through capacity planning and project approval.

The integration takes proposed projects from Planview Enterprise and sends them to Troux where enterprise architects can leverage the depth of information available to assess the technology and business risks. Planview Enterprise lifecycles provide governance to determine which projects to assess (be it all or some) and when it is required. Troux metrics such as EA alignment, capability importance, and the number of affected applications flow back to Planview Enterprise to ensure the portfolio assessment has a holistic picture of the investment. Once approved, project status flows back from Planview Enterprise to Troux to communicate progress.

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## Realizing Capability Driven Planning

As discussed in “New Business Capability Dimension for Portfolio Management” above, capability-driven planning is vital to ensure resources are allocated to the core competencies of the business. While capabilities can be manually entered and managed in Planview Enterprise, improved accuracy and alignment is provided by integrating with Trous as the system-of-record for both capabilities and the relationship of those capabilities to projects. With the integration, Planview Enterprise receives the most up-to-date capability hierarchy and the proper mapping of capabilities to projects, thereby enabling a better understanding of how financial and human resources are planned against the business capabilities that define your business.



## Enhanced Integration Between Planview Enterprise and Projectplace

Furthering Planview's No Matter How You Work™ approach to managing different work methodologies in the most appropriate tool, the Planview Enterprise and Projectplace integration has been enhanced to support project management, resource management and time reporting in the product best tailored to the use case.

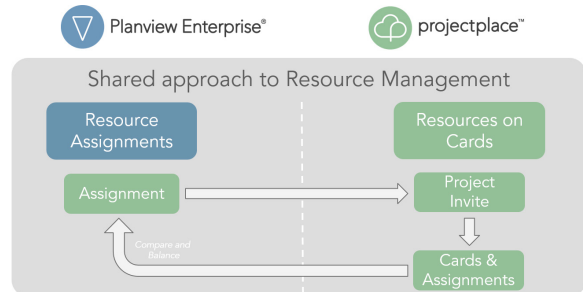
## Manage your Projects

Typically, larger, more structured projects are managed in Planview Enterprise while more collaborative work is managed in Projectplace.

- For more traditional projects, project managers can build and manage their full project plan and dates in Planview Enterprise, knowing that all of this information will flow to Projectplace enabling additional collaboration, particularly involving business participants.
- For collaborative work, projects plans managed in Projectplace flow to Planview Enterprise to enable downstream portfolio management use cases, including demand management, capacity planning, resource management and financial planning.

## Manage your Resources

For teams where resource management use cases such as assignment workflows, utilization, and financial forecasting of planned assignments are applicable, resources can be managed in Planview Enterprise across all work, whether the work is being managed in Planview Enterprise or Projectplace.



The integration enables specific enhancements including:

- Shared assignments between Planview Enterprise and Projectplace, allowing the resources assigned in Planview Enterprise to automatically be invited to the Projectplace project
- Resource manager can compare planned assignments in Planview Enterprise to the card assignments in Projectplace

## Track Time in Either Product

Users can report time in either Projectplace or Planview Enterprise. If reported in Projectplace, through the integration, the time will be sent to Planview Enterprise for consolidation, understanding actuals and tracking costs.

## Additional Enhancements in Planview Enterprise 11.5

- Configurable first day of the week calendar allows users to tailor the calendar to their specific business needs
- New submitted timesheets column in Resource Portfolio Manager improves managing timesheet compliance including identifying resources with missing timesheets
- Additional Work and Resource Management enhancements improve project planning and management:
  - Directly edit the requirement percent utilization to scale the entire assignment in a single step
- Additional columns displaying expired effort by assignment, supporting the options to expire assignments
- Renaming user security features makes tailoring and securing the user experience by user easier than ever. For example, you could rename “Custom 41” to “Project Manager” or “Executive” and use it to ensure specific tiles and reports were only available to those users.
- Support for Office 365 customers with the full, installed Office applications. For specific information on which versions of installed Office are supported, please refer to the Compatibility Matrix.

For more information visit  
[Planview.info/Enterprise-11-5](http://Planview.info/Enterprise-11-5), [PlanviewPRISMS.com](http://PlanviewPRISMS.com)  
or ask your Planview representative today

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