

## Solution brief

# The Planview Customer Success Center: Planview at Your Fingertips

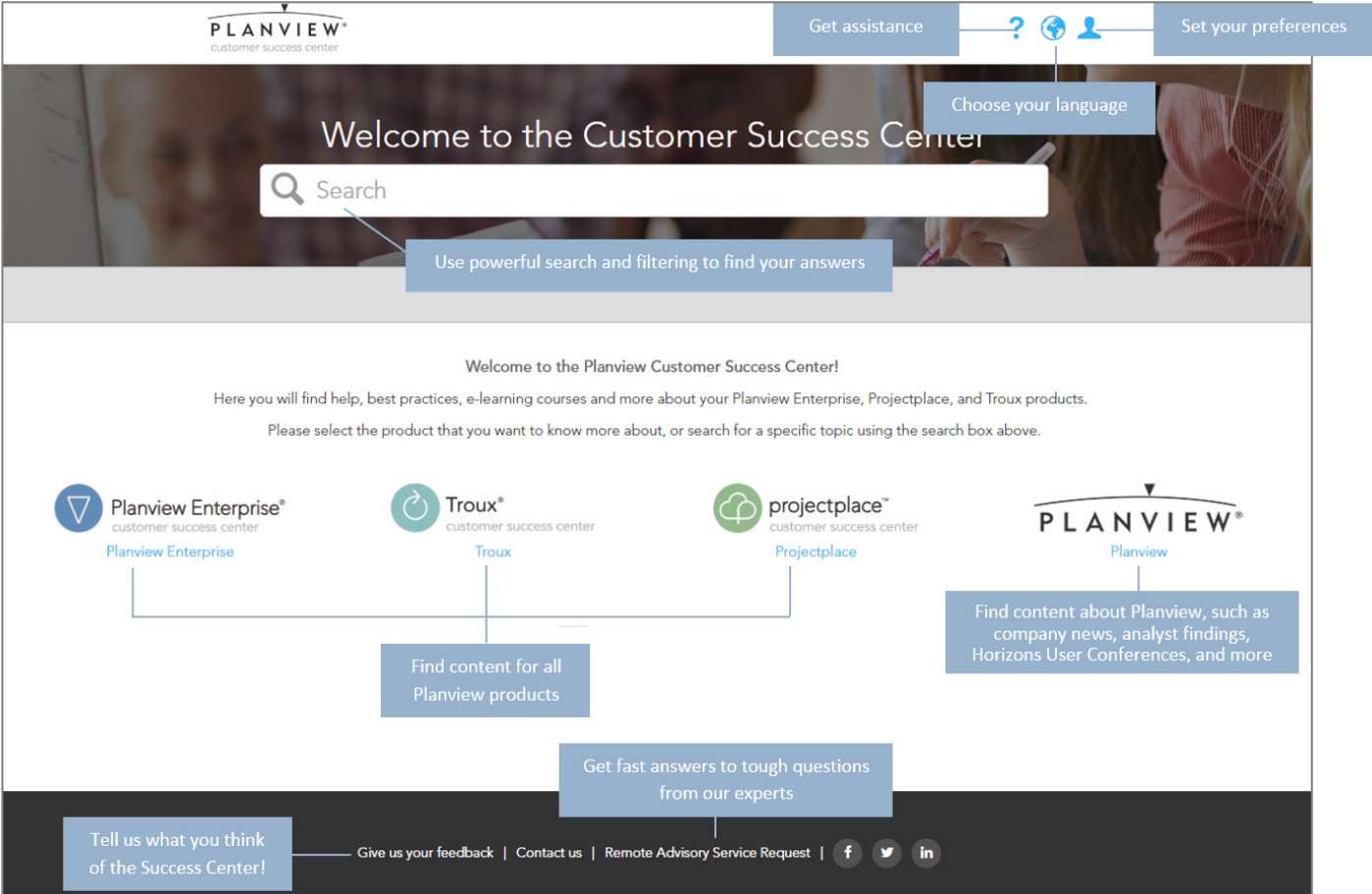
Planview is committed to making sure you get the most out of your Planview products and feel great about your decision to use them. That's why we created the Planview Customer Success Center, with tools that elevate your experience, answer every question, and turn you into a product expert, quickly and efficiently.

The Customer Success Center offers more than 17,000 pages of easy-to-find, easy-to-use content that speeds adoption and time to value for users across your organization for Planview Enterprise®, Troux®, and Projectplace®.

With content differentiated by product, the Customer Success Center delivers valuable offerings like:

- **Product Pages:** Enabling your team with How-To articles, Product Help, FAQs, and videos
- **Adoption Strategy:** Supporting organizational change with plans and resources for communication and education
- **Education and Training:** Maximizing learning with individualized, role-based classes
- **Planview PRISMS® E-learning and Best Practices:** Accelerating maturity with online training and action-oriented best practices

The Planview Customer Success Center is organized for maximum usability and effectiveness. Let's take a look.



The screenshot shows the Planview Customer Success Center interface. At the top, there is a navigation bar with the Planview logo and the text "customer success center". To the right of the logo are buttons for "Get assistance" (with a question mark icon), "Choose your language" (with a globe icon), and "Set your preferences" (with a person icon). Below the navigation bar is a large banner area with the text "Welcome to the Customer Success Center" and a search bar. A callout points to the search bar with the text "Use powerful search and filtering to find your answers". Below the banner is a main content area with the text "Welcome to the Planview Customer Success Center! Here you will find help, best practices, e-learning courses and more about your Planview Enterprise, Projectplace, and Troux products. Please select the product that you want to know more about, or search for a specific topic using the search box above." Below this text are three product selection buttons: "Planview Enterprise" (with a triangle icon), "Troux" (with a circular arrow icon), and "Projectplace" (with a cloud icon). A callout points to these buttons with the text "Find content for all Planview products". To the right of these buttons is a button for "Planview" (with the Planview logo) and a callout pointing to it with the text "Find content about Planview, such as company news, analyst findings, Horizons User Conferences, and more". At the bottom of the main content area is a button for "Get fast answers to tough questions from our experts". At the very bottom of the page is a footer with the text "Tell us what you think of the Success Center!" and a link to "Give us your feedback | Contact us | Remote Advisory Service Request |" followed by social media icons for Facebook, Twitter, and LinkedIn.

There is a vast array of valuable content for all Planview product lines, though specific content varies by product. Let's see what's in the Planview Enterprise section of the Customer Success Center:

Welcome to the Planview Enterprise Customer Success Center

Search

Home

## Planview Enterprise

Welcome to the Planview Enterprise Customer Success Center!

- What's new in the product?
  - News and Announcements
- White Papers, templates, and more
  - Resource Center
- E-learning and Enablement Paths
  - Training Center
- Networking and discussion forums
  - Communities and Programs

See curated content for each topic that gets you up to speed quickly

- QuickStart Guides
- Planview Enterprise Fundamentals
- Project and Work Management
- Resource Management
- Analytics and Reporting
- Investment and Capacity Planning
- Strategic Management
- Product Portfolio Management
- Assets, Applications, and Service Management
- Outcome Portfolio Management
- Planview Enterprise Administration
- Financial Management
- RPM Solutions

Dive into the specifics

Each category provides a wealth of information:

Home » Planview Enterprise » Resource Management

## Resource Utilization

Capability Definition      Section definition and goals      Business Outcomes

- The ability to plan longer-term, unnamed resource needs for a project.
- Role based resource demand will be defined in the schedule/plan for each work item/project. Demand is expressed in terms of organizational roles.
- This demand can be balanced against capacity to determine the ability of the organization to deliver work.
- Demand created against the project plan is used as the communication mechanism for resource managers to understand the future demand on their teams.
- Management of a summarized view of organizational capacity which is used as capacity (and cost of capacity) targets in the investment portfolio
- This capability provides the ability to see whether the organization can meet its current demand based on the current available headcount.

- The demand for resources to deliver projects and work is being forecasted by project managers and this demand is feeding the staffing and resource management processes.
- Demand is being forecast according to organizational dimensions such as role and department, such that it can be balanced against the organizational capacity.
- Resource Managers can proactively identify resourcing issues and collaborate with work and project managers to smooth demand and prevent resource shortages from impacting project timelines.
- Organizational capacity targets can be calculated and managed and used as the targets for the investment portfolio.
- Capacity constraints can be identified.
- Different capacity targets can be used in the modeling of different portfolio scenarios.

QuickStart - Resource Utilization: collection of information to help you get the most out of your solution.

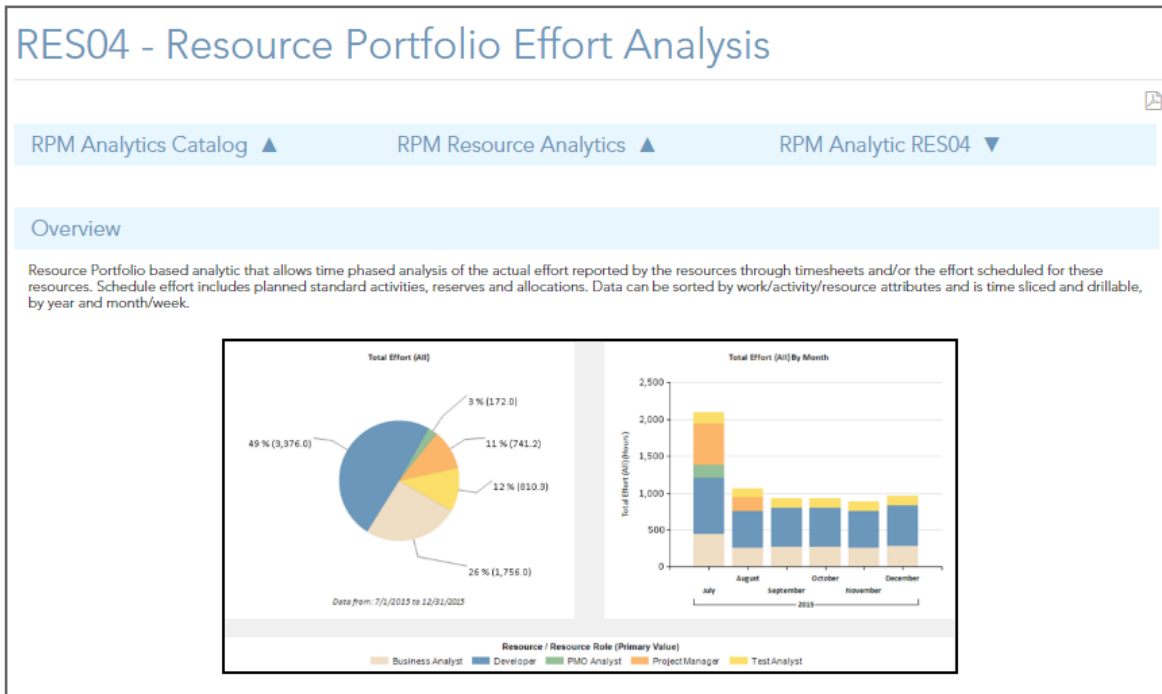
Tabbed access to different areas that help you get the most out of your solution

Featured    How-To    Product Help    E-learning    Best Practices    FAQs    Analytics

Most popular	Highest rated	Recently updated
<ul style="list-style-type: none"> <li>QuickStart - Resource Utilization</li> <li>Analyze Resource Utilization</li> <li>Use the Work Effort Tab within the Work View</li> <li>Editing Effort Profiles</li> <li>Review Organizational Resource Utilization Chart - Overview</li> </ul>	<ul style="list-style-type: none"> <li>Reviewing Workload and Availability of All Resources in a Portfolio</li> <li>Use the Work Effort Tab within the Work View</li> <li>Editing Effort Profiles</li> <li>Profiling Assignments (Introduction)</li> <li>Disabling Hourly Data Based on Resources</li> </ul>	<ul style="list-style-type: none"> <li>QuickStart - Resource Utilization</li> <li>Profiling Assignments (Introduction)</li> <li>Manage Resource Capacity</li> <li>Review Resource Utilization for a Portfolio</li> <li>Review Organizational Resource Utilization Chart - Overview</li> </ul>

# Analytics and Reporting

A quick click on the Analytics tab leads to the RPM Analytic for that section, with helpful parameter configurations:



## Getting Started

Users just getting started or training new teams will love the Fundamentals section. This offers an introduction into product terminology and functionality, and also applies a role-driven approach to navigating further content.

## QuickStart Guides

Our QuickStart Guides provide a great starting place for learning about specific product capabilities. These guides, developed for many of our offerings, provide curated articles and videos from our vast content library and put you on the path to becoming an expert.

## Enablement and Adoption

Visit Enablement Resources within the Resource Center to find tools that will spur enterprise-wide adoption. Having a strong communication plan, stakeholder plan, and visible executive support can make or break an implementation, and these resources can facilitate your journey. From white papers with 50 Ways to Lead Your Users, to video scripts for your executives, to educational user emails: it's all here to streamline your journey.

## Education and Training

Learning how to use your new products is vital to speeding ROI and time to value, and ongoing education helps hone new skills and deepen competencies. Our Training Center is your gateway to role-based learning that leverages best practices and our industry-leading teaching expertise for on-site or virtual classes. Additionally, the Training Center enables quick and easy registration for open enrollment, instructor-led training.

### Planview PRISMS

Representing our most powerful material, Planview PRISMS is proven to help you maximize your Planview Enterprise investment, protect it, and accelerate its effective use and adoption by increasing process maturity and lowering support overhead. It does this with a combination of 300+ **E-learning modules** and **200+ Best Practices** that provide on-the-spot, targeted learning that helps users answer questions as their capabilities grow.

## Open to All

The Customer Success Center was built for you. Every Planview customer has access. Simply visiting [success.planview.com](https://success.planview.com) exposes fantastic tools; signing in provides the full range of content to you.

No log-in? No problem. The Customer Success Center enables self-registration. As long as you register with a valid Planview customer email domain, you can register yourself; there is no lengthy process involving your Planview administrator.

## Make Success Yours Today

There's a lot to discover in the Planview Customer Success Center, and we're updating it every day. From adding more multilingual content, to increasing our store of short E-learning videos, to our FAQs, How-to articles, Best Practices and so much more! Access it from your Planview product or directly from the Web, and use it on whatever mobile device is handy.

Let us know how we're doing. Each page provides feedback tools: your input is crucial to the growth of your Success Center!

Contact us at [successcenter@planview.com](mailto:successcenter@planview.com) today and get your own no-strings-attached demo of the Planview Customer Success Center!