



# PPM Pro Customer Webinar: November 2021 Release

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Moderator: Malika Taouil, Customer Marketing Manager

# Housekeeping Items

- 30-35 minutes of presentation
- Remainder Q&A
- All lines are on mute
- Enter questions into the Q&A box
  - If you can't see the chat box, click Q&A at the bottom right of the Zoom window
- Webinar is being recorded
- Recording and slides will be shared in post-webinar email, including additional info about the release process



# Task Timeline

Option to show key tasks on a high-level timeline that can be shown above Tasks grid

The screenshot displays the Planview PPM Pro interface for an "Agile - Hybrid Development Project". The left sidebar shows a navigation menu with sections like Details, Staffing, Tasks (37), Project Log (2), Portfolios (1), Notes (0), Status Comments..., Attachments (4), Dashboards, Dashboards (Lega...), Associations (0), Team (11), and Settings. The main area is divided into two panes. The left pane, titled "Tasks", shows a Gantt chart timeline from 11/2/2017 to 4/1/2018. A task bar for "Project S" is highlighted, and a red box highlights the "Show on Timeline" button. The right pane, titled "Project Management Plan", shows a form for task details. A red box highlights the "Show on Timeline" checkbox, which is currently checked, and the "Start Date to Target Date" dropdown menu.

Info	#	Outl...	Title	Predecess...	Priority	Status	Scheduled Resources	Constraint Type
	11	2.6	Stakeholder Manag...	10		Open		As soon as po...
	12	3	Requirements Analysis ...	6		Open		As soon as po...
	13	3.1	Requirements Anal...			Open		As soon as po...
	14	3.2	Test Master Plan	13		Open		As soon as po...
	15	4	Test Master Plan	13		Open		As soon as po...

# ETC and EAC Standard Fields for Financial Entries

Uses the Financial Summary ETC & EAC calculation method for new standard Financial Entry fields for ETC & EAC

Summary

Entries

Filter Financial Entries

New Actuals

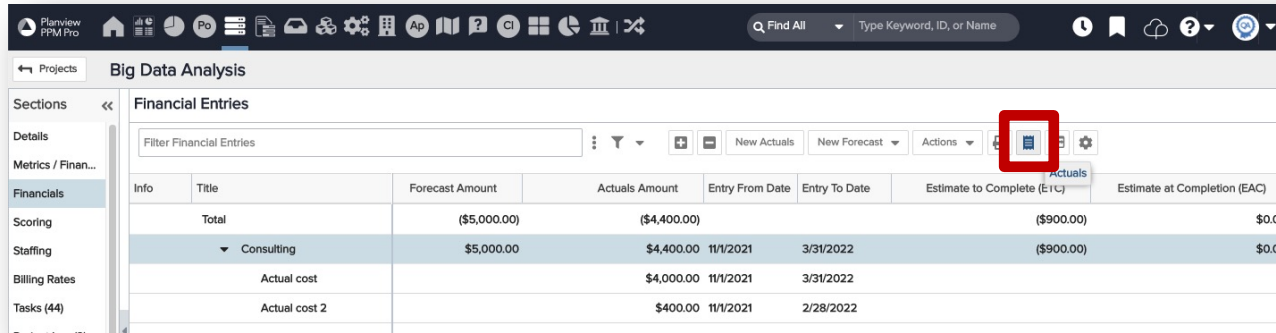
New Forecast

Actions

<

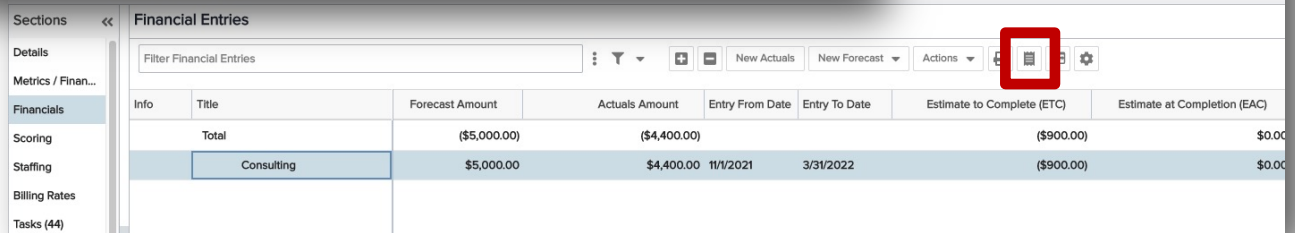
# Hide/Show Actuals in Financial Entries Grid

Hide/show Actuals toggle to enhance performance when only working with Forecasts



The screenshot shows the Planview PPM Pro interface. The top navigation bar includes the Planview PPM Pro logo, a search bar with 'Find All' and 'Type Keyword, ID, or Name', and various utility icons. The left sidebar shows 'Sections' with 'Financials' selected. The main area is titled 'Big Data Analysis' and 'Financial Entries'. Below this is a 'Filter Financial Entries' search bar and a toolbar with icons for 'New Actuals', 'New Forecast', 'Actions', and a red box highlighting the 'Actuals' toggle icon. The table below has columns: Info, Title, Forecast Amount, Actuals Amount, Entry From Date, Entry To Date, Estimate to Complete (ETC), and Estimate at Completion (EAC). The data rows are:

Info	Title	Forecast Amount	Actuals Amount	Entry From Date	Entry To Date	Estimate to Complete (ETC)	Estimate at Completion (EAC)
Total		(\$5,000.00)	(\$4,400.00)			(\$900.00)	\$0.00
Staffing	Consulting	\$5,000.00	\$4,400.00	11/1/2021	3/31/2022	(\$900.00)	\$0.00
Billing Rates	Actual cost		\$4,000.00	11/1/2021	3/31/2022		
Tasks (44)	Actual cost 2		\$400.00	11/1/2021	2/28/2022		



This screenshot is similar to the one above, but the 'Consulting' row is selected, and the 'Actuals' toggle icon is highlighted with a red box. The table data is the same as in the previous screenshot.

Info	Title	Forecast Amount	Actuals Amount	Entry From Date	Entry To Date	Estimate to Complete (ETC)	Estimate at Completion (EAC)
Total		(\$5,000.00)	(\$4,400.00)			(\$900.00)	\$0.00
Staffing	Consulting	\$5,000.00	\$4,400.00	11/1/2021	3/31/2022	(\$900.00)	\$0.00
Billing Rates	Actual cost		\$4,000.00	11/1/2021	3/31/2022		
Tasks (44)	Actual cost 2		\$400.00	11/1/2021	2/28/2022		

# Managed Staffing (no resource) Unit Manager Routing

New Routing option for requester to select a Unit Manager as the Route To when no resource is proposed

The screenshot displays the Planview PPM Pro interface. On the left, the 'Sections' menu is open, showing 'Routing' selected under the 'Organization' section. The main area shows the 'Routing' configuration page with 'Staffing Request Options'. A red box highlights the option: 'A specific hierarchy unit and unit manager that the requester selects'. To the right, a 'Submit Request' dialog is open, showing a table with columns: Role, Resource, Status, Memo, Start Date, End Date, Staff by Date, Headcount, Note, and Route To. The 'Route To' dropdown is open, showing a 'Select value' dialog. This dialog has a 'Type' section with 'Unit Manager' selected and an 'Other' option. Below, a list of hierarchy units is shown, including 'Innotas 2016 Demo Environment', 'Test 1234', 'Freed', 'IZDE - Davis, Kristen', and 'IZDE - Hill, Stephen'. Each unit has a corresponding 'Unit Manager' listed next to it.

**Staffing Request Options**

- ☒ Requester can change who staffing request will be routed to
- When "(No Resource)" is in the staffing request, set default routing option to:
  - ☐ The designated staffer for the requested role or role group [Manage Staffers]
  - ☐ A specific user, group, or hierarchy unit that can staff requests
  - ☒ A specific hierarchy unit and unit manager that the requester selects
- When a resource is proposed in the staffing request, set default routing option to:
  - ☐ Unit manager of the proposed resource
  - ☒ The designated staffer for the requested role or role group [Manage Staffers]
  - ☐ A specific user, group, or hierarchy unit that can staff requests

**Submit Request**

Role	Resource	Status	Memo	Start Date	End Date	Staff by Date	Headcount	Note	Route To
<input type="checkbox"/> Sponsor		New		11/8/2021	12/8/2021	11/8/2021	1.00		

**Select value**

Type: ☒ Unit Manager ☐ Other

Title: Unit Manager

- Innotas 2016 Demo Environment
  - Test 1234
    - Freed
      - Thomas, Jeff
    - IZDE - Davis, Kristen
      - innotas, user2841
      - Davis, Kristen
    - IZDE - Hill, Stephen
      - Hill, Stephen

Buttons: Submit, Cancel

# Upcoming Webinars/Events

- No December release webinar (happy holidays!)
- December release items will be covered in January

PRODUCT RELEASES

## Planview PPM Pro Customer Webinars

2022

Monthly Release Webinars	Other Webinars of Interest
1/19/2022: January Release   <a href="#">Register</a>	2/23/2022: Q1 Roadmap Webinar   <a href="#">Register</a>
2/16/2022: February Release   <a href="#">Register</a>	8/31/2022: Q3 Roadmap Webinar   <a href="#">Register</a>
3/16/2022: March Release   <a href="#">Register</a>	
4/13/2022: April Release   <a href="#">Register</a>	
5/18/2022: May Release   <a href="#">Register</a>	
6/15/2022: June Release   <a href="#">Register</a>	
7/13/2022: July Release   <a href="#">Register</a>	
8/17/2022: August Release   <a href="#">Register</a>	
9/14/2022: September Release   <a href="#">Register</a>	
10/19/2022: October Release   <a href="#">Register</a>	
11/16/2022: November Release   <a href="#">Register</a>	



## Q&A

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Thank You