PPM Pro Customer Webinar: March 2022 Release

Thanks for joining! We'll start 1 minute after the bottom of the hour.

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PPM Pro Customer Webinar: March 2022 Release

PPM Pro Product Posse: Yessica Archilla (yay!), Stuart Baker, Lamar McMechan, Sherrill Packebush
Moderator: Malika Taouil, Customer Marketing Manager

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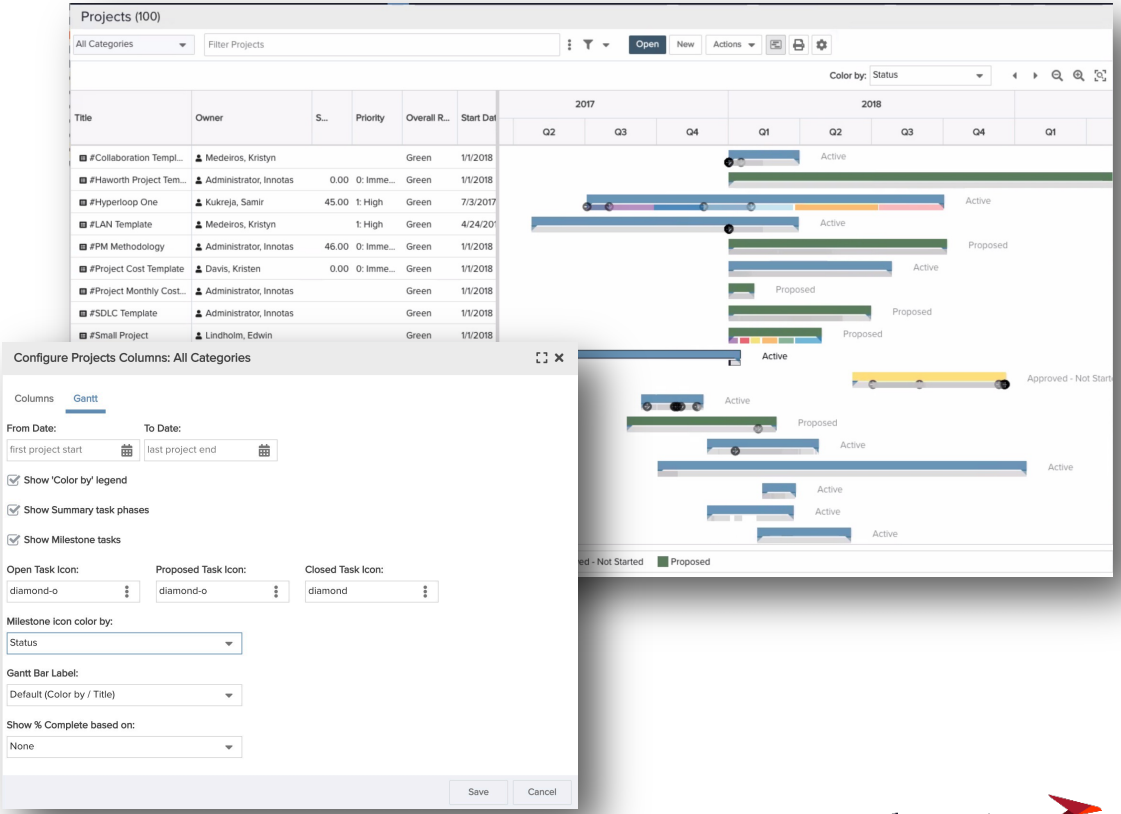
Housekeeping Items

- 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

Project Gantt Phases and Milestones (GA)

- Show summary task phases
  - Requires 'Task Phase' on summary tasks
- Show milestone tasks
  - Implied Status icon
  - Color by
- Generally Available!



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Financial Summary (Beta)

Two additional NPV standard fields, Titles can be changed

Planview PPM Pro | Home | Portfolios | Projects | Requests | Resources | Organiza... | Find All | Type Keywor...

Sections
- Organization
- All Divisions
- All Departments
- Manage Time
- Finances
  - Financial Summary Comp
  - Internal Rates
  - Settings

Financial Summary Components

General | Fields

Save | Cancel

Data Streams

Allow	Data Stream Description	Display Name
☑	Approved amount of cash inflow/outflow	Budget
☑	Expected amount of cash inflow/outflow	Forecast
☑	Actual amount of cash inflow/outflow	Actuals

Estimate to Complete (ETC) and Estimate at Completion (EAC)

- (•) Calculate EAC as BAC/CPI. Calculate ETC as EAC - Actual Cost.
- ( ) Calculate EAC as ETC + Actual Cost.
  Calculate ETC as Total Forecasts - Actual Cost when this difference is a positive value, else, it is just all future Forecasts.
- ( ) Calculate EAC as ETC + Total Cost.
  Calculate ETC as Total Forecasts - Total Cost when this difference is a positive value, else, it is just all future Forecasts.
- ( ) Calculate EAC as ETC + all Actuals for prior and past months.
  Calculate ETC as all Forecasts for current and future months.

Year 1 NPV

Year 3 NPV

Year 5 NPV

NPV is calculated as the difference between the present value of cash inflows and the present value of cash outflows over a period of time given a discount rate.

Calculate for 5 Years

Discount rate (%) 12

Financial Summary Settings

Date Range | Columns | Calculations

Year 1 NPV

Year 3 NPV

NPV is calculated as the difference between the present value of cash inflows and the present value of cash outflows over a period of time given a discount rate.

Cash flow start date 6/8/2020

Calculate for 3 Years

Discount rate (%) 12

Year 5 NPV

Estimate to Complete (ETC) and Estimate at Completion (EAC)

Save | Cancel

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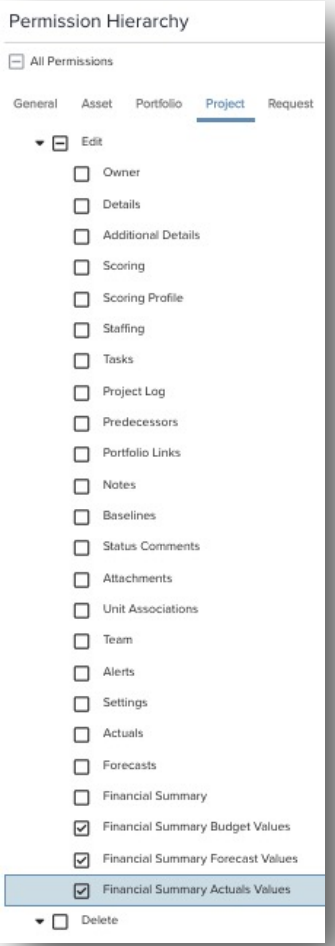
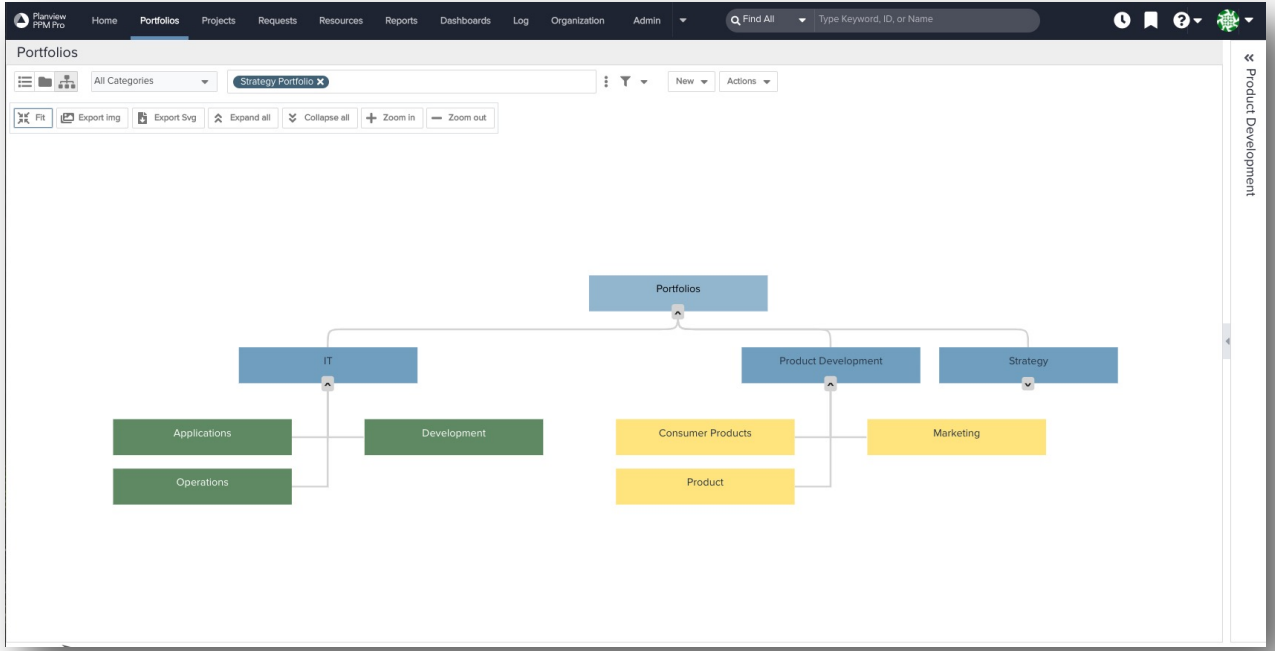
Financial Summary (Beta)

- New permissions:
  - **Edit > Financial Summary Budget Values**
  - **Edit > Financial Summary Forecast Values**
  - **Edit > Financial Summary Actuals Values**
- **View > Financial Summary** implicitly selected when edit value permission(s) selected
- **Delete > Financial Summary** removed; users with **Edit > Financial Summary** permission can delete



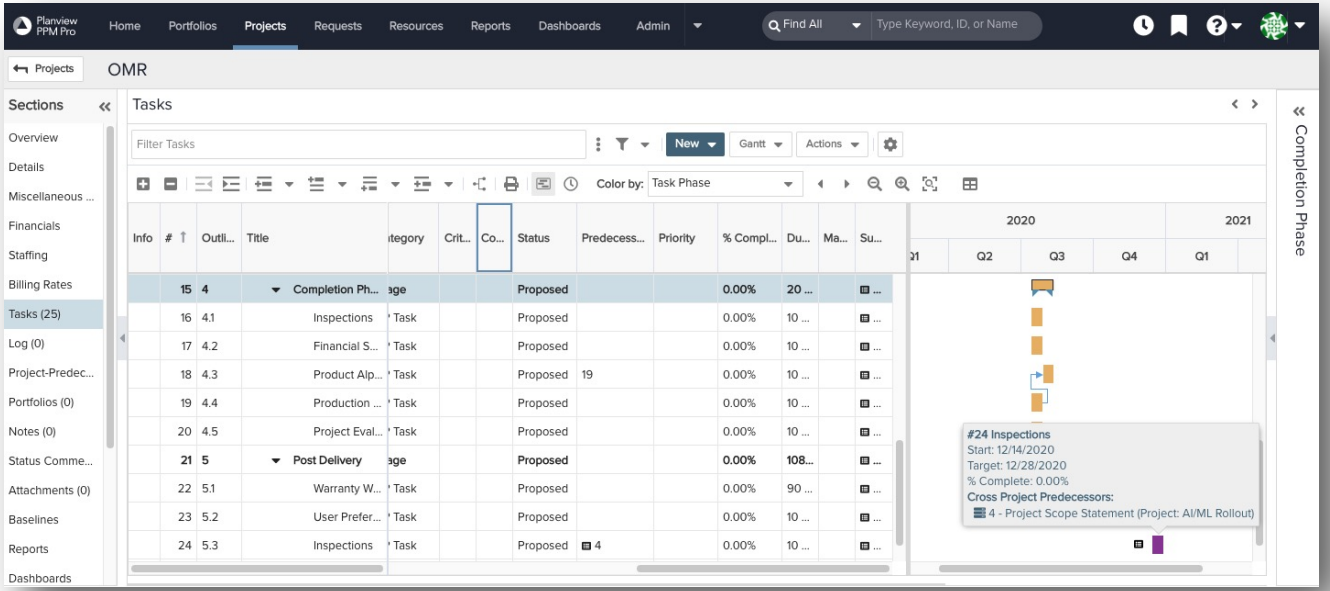
Revamped Portfolio Chart View

Various zoom, expand/collapse, and export options



Cross-Project Dependencies on Task Gantt

Indicates cross-project dependencies on Task Gantt UI and Reports



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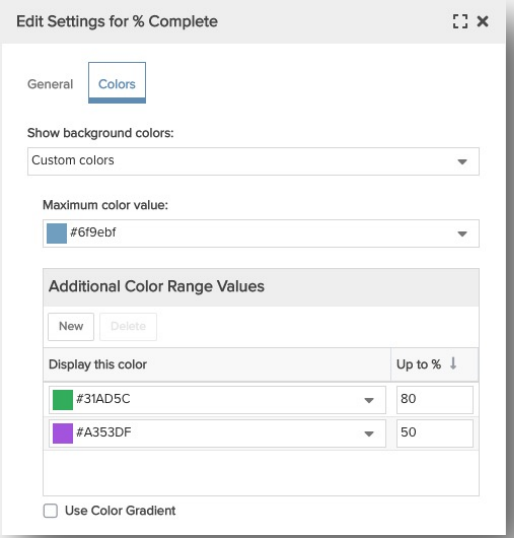
List Numeric Field Conditional Color Config

- For numeric fields in List: Basic and List: Time Series
- Same field color configuration options as time series fields



Title	Owner	% Complete	Mar '21		Apr '21		May '21
			Staffed Demand Hours	Actual Hours	Staffed Demand Hours	Actual Hours	Staffed Demand Hours
Expand OTC Healthcare Offerings	Hill, Stephen	12%	749.20	631.80	749.20	631.80	749.20
Fin Sum Demo Release Webinar	Geld, Anthony	50%	120.00	1.00	120.00	1.00	120.00
Funtastic Timeline	Kukreja, Samir	57%	15,187.28	65.00	15,187.28	65.00	15,187.28
Google Apps Rollout	McGuire, Shane	20%	858.80	36.10	858.80	36.10	858.80
Health Packaging made from Recyclables	Dailey, Maria	6%	2,658.20	410.00	2,658.20	410.00	2,658.20
Hyperloop	Kukreja, Samir	71%	20.00	50.00	20.00	50.00	20.00
Hyperloop One	Kukreja, Samir	85%	352.00	405.00	352.00	405.00	352.00
Increase Machine Inspections!	Christianson, Susanna	100%	1,633.12	5,070.96	1,633.12	5,070.96	1,633.12
LAN 101	Kukreja, Samir	0%	1,476.80	1,884.00	1,476.80	1,884.00	1,476.80
Launch Holiday Packaging	Christianson, Susanna	0%	669.44	515.00	669.44	515.00	669.44
Lean Six Sigma Project	Nauyalis, Carrie	18%	2,788.40	186.00	2,788.40	186.00	2,788.40
Legal Guidance	Cabrero, Filipe	55%	330.00	404.00	330.00	404.00	330.00
Maint I	Dailey, Maria	100%	1,450.76	7,506.33	1,450.76	7,506.33	1,450.76
Maint II	Cabrero, Filipe	100%	2,206.24	4,996.00	2,206.24	4,996.00	2,206.24
Merger - People, Process, Technology	McGuire, Shane	100%	2,115.82	90.00	2,115.82	90.00	2,115.82
Mobile Application Project	Hill, Stephen	100%	7,032.53	1,467.60	7,032.53	1,467.60	7,032.53
Mobile Marketplace Upgrade	Kukreja, Samir	100%	1,718.34	1,887.50	1,718.34	1,887.50	1,718.34

Actual Hours: Up to 70% | Up to 80% | Up to 90% | Maximum value

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Upcoming Webinars/Events

- April Release Webinar March 13th
- Register for next webinars in advance: https://success.planview.com/Planview_PPM_Pro/Release_Information/Customer_Webinars

PRODUCT RELEASES

Planview PPM Pro Customer Webinars

Page restriction: Public

2022

Monthly Release Webinars	Other Webinars of Interest
1/19/2022: January Release | Q&A Transcript | View PDF | View Presentation	**2/23/2022:** Q1 Roadmap Webinar | Q&A Transcript | View PDF | View Presentation
2/16/2022: February Release | Q&A Transcript | View PDF | View Presentation	**8/31/2022:** Q3 Roadmap Webinar | Register
3/16/2022: March Release | Register	
4/13/2022: April Release | Register	
5/18/2022: May Release | Register	
6/15/2022: June Release | Register	
7/13/2022: July Release | Register	
8/17/2022: August Release | Register	
9/15/2022: September Release | Register	
10/19/2022: October Release | Register	
11/16/2022: November Release | Register	

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Q&A

Yessica yarchilla@planview.com

Sherrill spackebush@planview.com

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Thank You

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