

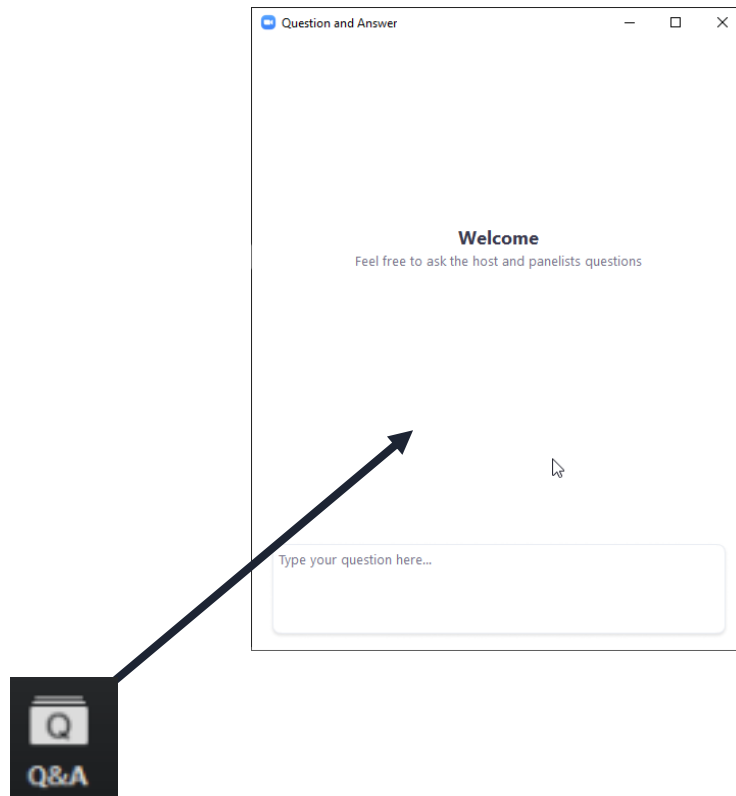


PPM Pro Customer Webinar: April 2022 Release

PPM Pro Product Posse: Yessica Archilla, Sherrill Packebush, Stuart Baker, Lamar McMechan,
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



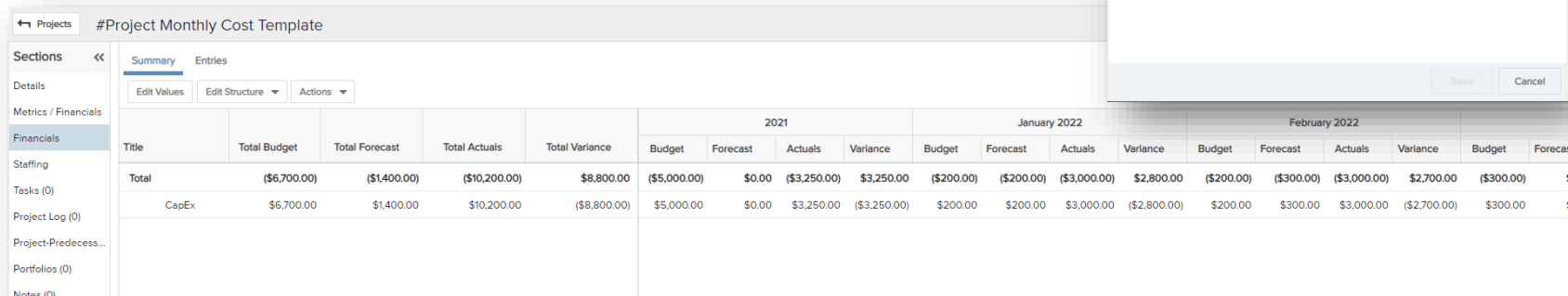


IMPORTANT:

April 2022 Release has been scheduled
for **Monday April 18th, 2022**

Financial Summary (Beta) – Configurable Date Range

- Defined start and end date
- Sets visible area of the financial summary
- Financial summary metrics only include project data within date range
- More control over quarter/year period designation



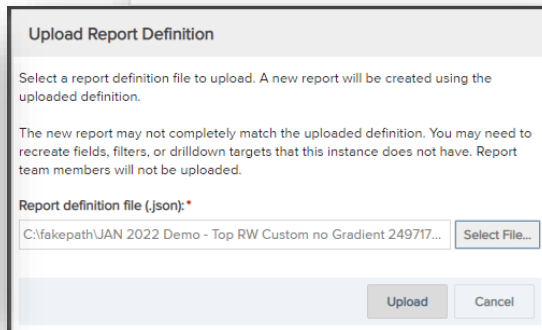
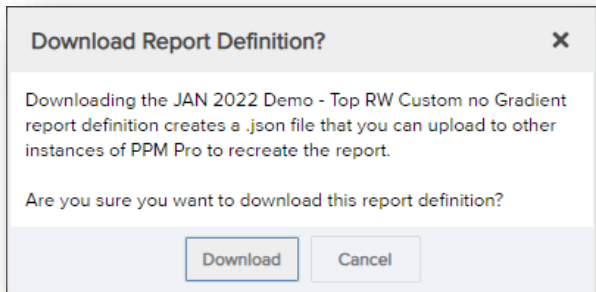
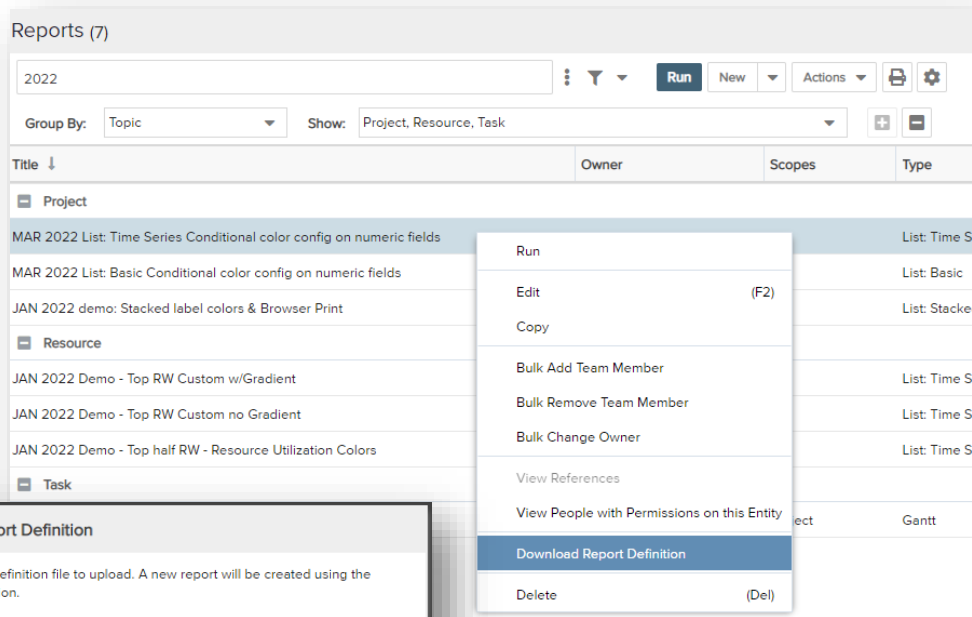
The screenshot displays the 'Financial Summary Settings' dialog box in the upper right corner, which allows users to configure the date range for the financial summary. The dialog has three tabs: 'Date Range', 'Columns', and 'Calculations'. The 'Date Range' tab is active, showing fields for 'Start' (January 2021), 'End' (December 2042), 'Monthly range' (January 2022 through January 2023), 'Display previous periods as' (Years), and 'Display next periods as' (Years). 'Save' and 'Cancel' buttons are at the bottom right of the dialog.

The main application window shows the '#Project Monthly Cost Template' under the 'Projects' section. The 'Summary' tab is selected, and the 'Edit Values' button is active. The table below provides a detailed breakdown of financial metrics for 2021, January 2022, and February 2022.

Title	Total Budget	Total Forecast	Total Actuals	Total Variance	2021				January 2022				February 2022					
					Budget	Forecast	Actuals	Variance	Budget	Forecast	Actuals	Variance	Budget	Forecast	Actuals	Variance	Budget	Forecast
Total	(\$6,700.00)	(\$1,400.00)	(\$10,200.00)	\$8,800.00	(\$5,000.00)	\$0.00	(\$3,250.00)	\$3,250.00	(\$200.00)	(\$200.00)	(\$3,000.00)	\$2,800.00	(\$200.00)	(\$300.00)	(\$3,000.00)	\$2,700.00	(\$300.00)	
CapEx	\$6,700.00	\$1,400.00	\$10,200.00	(\$8,800.00)	\$5,000.00	\$0.00	\$3,250.00	(\$3,250.00)	\$200.00	\$200.00	\$3,000.00	(\$2,800.00)	\$200.00	\$300.00	\$3,000.00	(\$2,700.00)	\$300.00	

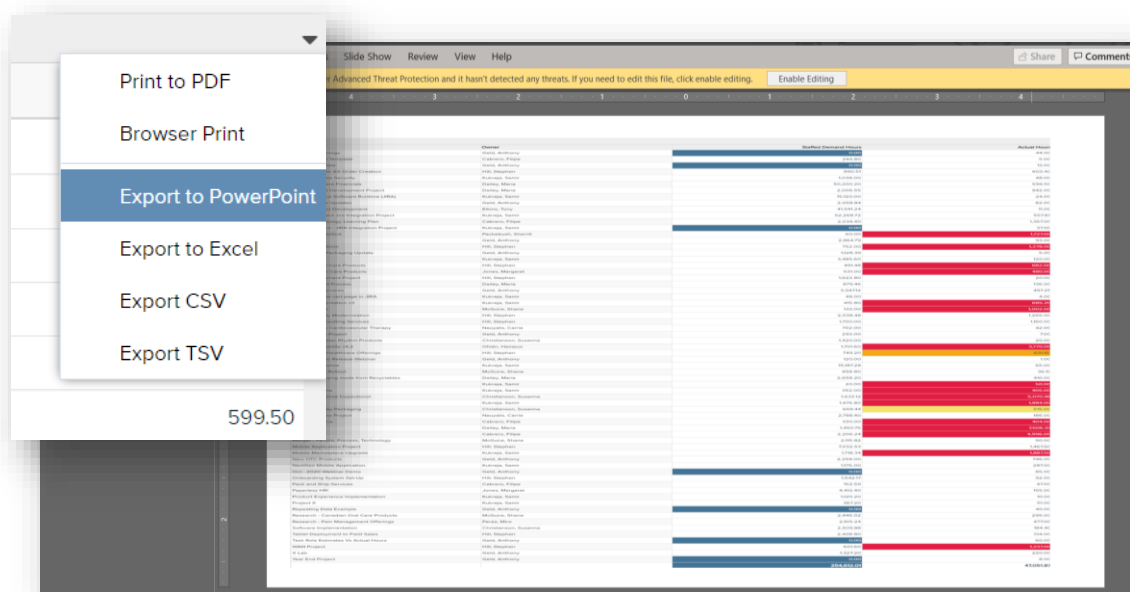
Download & Upload New Report Definition

- Download report definition files & upload to any instance
 - Items not in receiving instance will not appear (UDF, CF, drilldown targets, filters)
 - Team members will not appear
- Files in CSC Report Cookbook



Export to PowerPoint – Reports & Dashboards

- Any report or dashboard
- List, Crosstab, & Gantt exported to a single PowerPoint slide
- Each dashboard report exported to its own slide



List Report Container Title Font Options

Container title typeface and font options for
List: Basic, List: Stacked, List: Time Series, & Gantt reports

Design

General Data **Display** Variable Settings Team

Headings

Container title:
Project Overview

Container font: Proxima Nova Style: Bold & Italic Size: 28

Container font color: #a70415

☐ Wrap column titles

☒ Auto-size height in dashboard to fit content

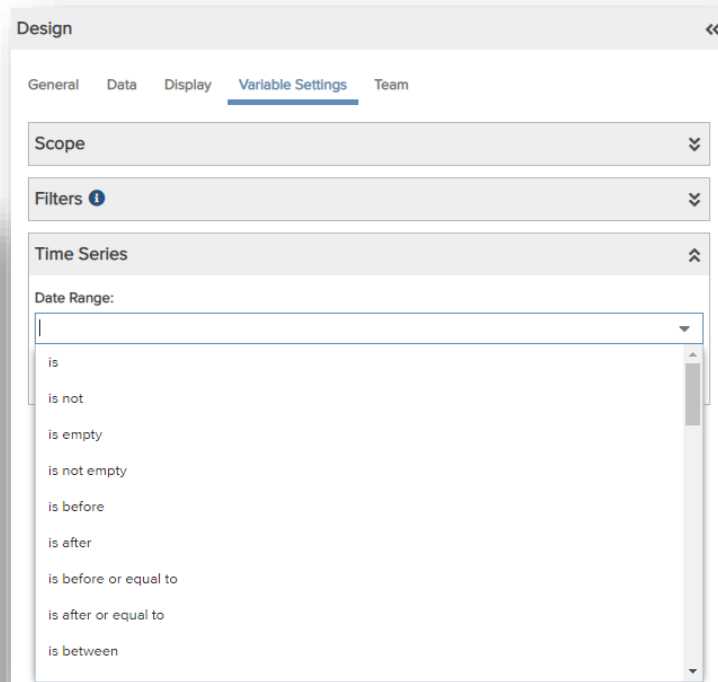
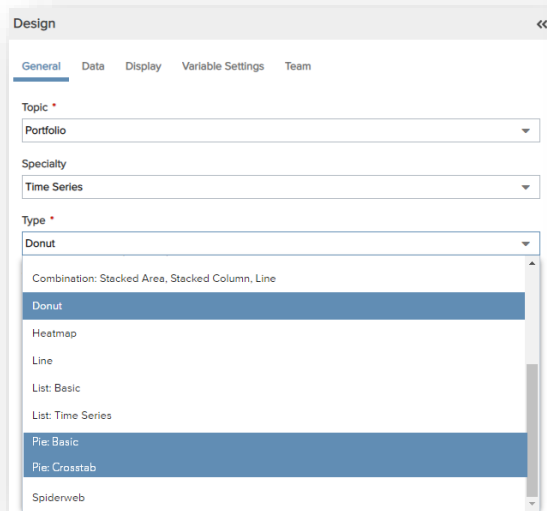
Project Overview

Title test ↑	Priority	Status	Start Date
! 03.16.2022 Phases and Milestones			
		Proposed	
# Agile Feature Work		Proposed	6/9/2021
# Stage Gate Template			
	0: Immediate	Archive	4/7/2020
#CW Template			
	1: High	Archive	4/28/2020
#JIRA Template			
		Archive	4/9/2020

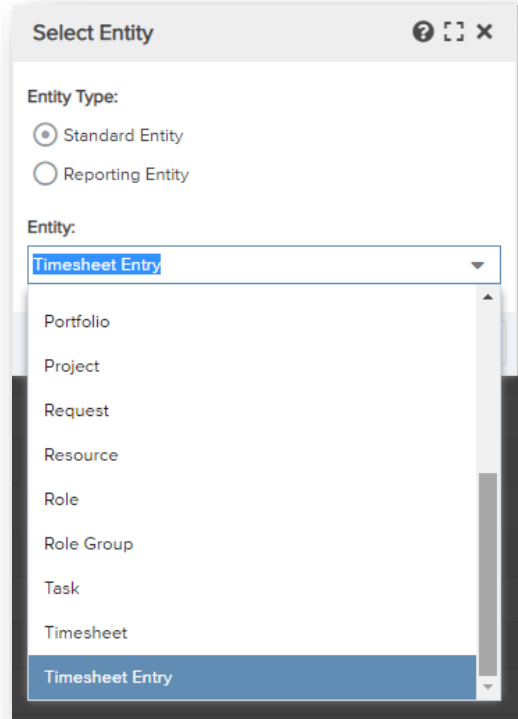
Pie & Donut Charts Available for Time Series Specialty

Pie and Donut report types added for Time Series specialty reports

- Date range variable setting now available



Calculated Field Entity: Timesheet Entry



- Timesheet Entry moved from Reporting Entity to Standard Entity
- Existing Timesheet Entry CFs available in new reports
- No impact to legacy reports

Upcoming Webinars/Events

- May Release Webinar May 18th
- 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 Q&A Transcript View PDF View Presentation	
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	



Q&A

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Thank You