

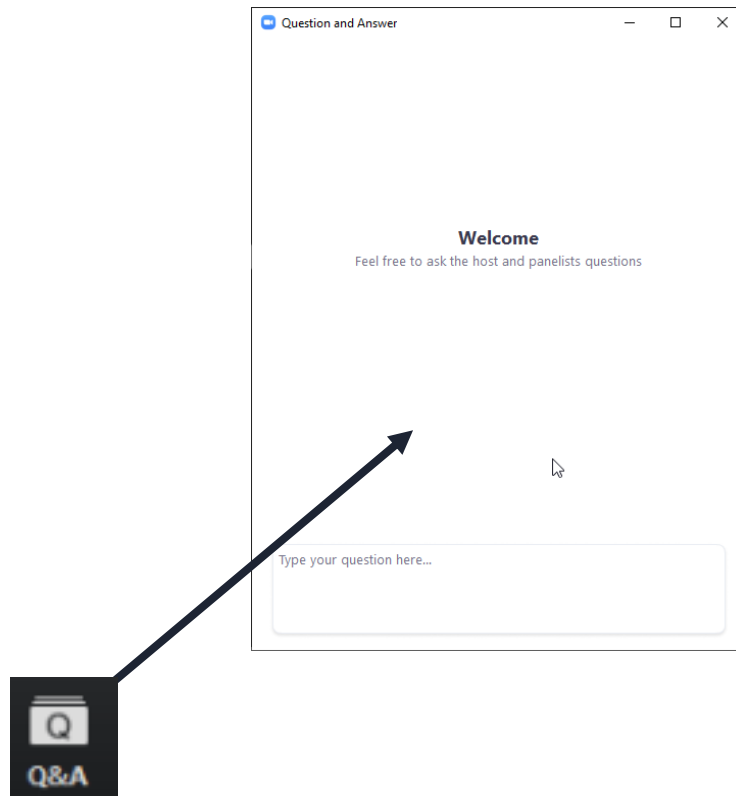


PPM Pro Customer Webinar: May 2022 Release

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

Housekeeping Items

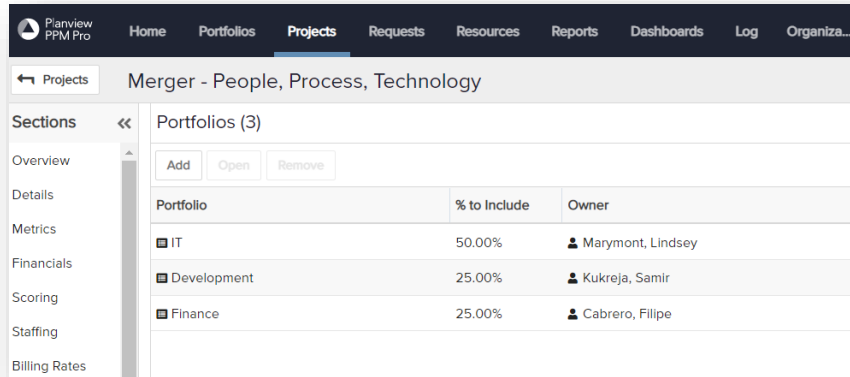
- 30-35 minutes of presentation
- Remainder Q&A
- All lines are on mute
- Enter questions into the Q&A box
 - If you can't see the chat box, click Q&A at the bottom right of the Zoom window
- Webinar is being recorded
- Recording and slides will be shared in post-webinar email, including additional info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



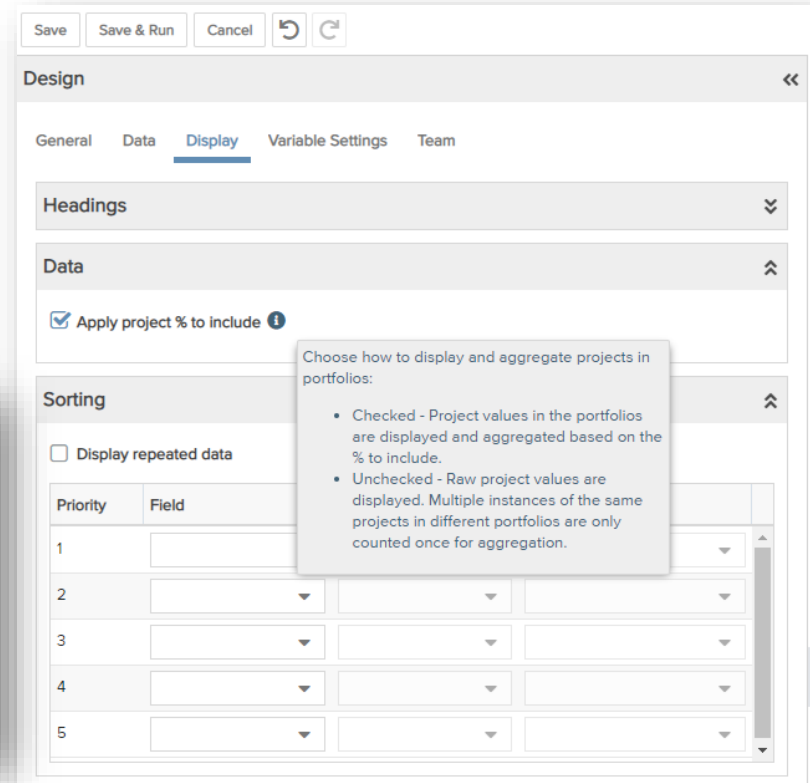
Apply Project % to Include to Reports

Apply project % to include

- Reports of Topic: Portfolio will have the option when a numeric portfolio field is added



Portfolio	% to Include	Owner
IT	50.00%	Marymont, Lindsey
Development	25.00%	Kukreja, Samir
Finance	25.00%	Cabrero, Filipe



Design

General Data **Display** Variable Settings Team

Headings

Data

☒ Apply project % to include ⓘ

Choose how to display and aggregate projects in portfolios:

- Checked - Project values in the portfolios are displayed and aggregated based on the % to include.
- Unchecked - Raw project values are displayed. Multiple instances of the same projects in different portfolios are only counted once for aggregation.

Sorting

☐ Display repeated data

Priority	Field
1	
2	
3	
4	
5	

Any & All Filter Logic on Reporting

Control whether you want report results to meet **Any** or **All** of the criteria in the two filters

The screenshot shows a 'Design' window with a 'Variable Settings' tab. Under the 'Filters' section, there is a heading 'Include report data matching:' followed by two radio buttons: 'Any filters' (which is selected) and 'All filters'. Below this, there are two sections for filter criteria. The first is 'Portfolios:' with a text input field 'Filter Portfolios' and a dropdown arrow. The second is 'Projects: Linked to Portfolio:' with a text input field 'Filter Projects' and a dropdown arrow. Each of these sections has an 'Allow changing filter:' checkbox with options 'Before running' and 'When viewing'.

List Report Column Title Font Options

Column Header title typeface and font options for List: Basic, List: Time Series & Gantt

Report Heading Container

Title	Status	Start Date	Target Date
#Collaboration Template	Active	1/1/2018	3/29/2018
#Heworth Project Template	Proposed	1/1/2018	11/30/2019
#Hyperloop One	Active	7/3/2017	10/1/2018
#LAN Template	Active	4/24/2017	3/29/2018
#PM Methodology	Proposed	1/1/2018	10/5/2018
#Project Cost Template	Active	1/1/2018	7/26/2018
#Project Monthly Cost Template	Proposed	1/1/2018	2/1/2018
#SDLC Template	Proposed	1/1/2018	6/29/2018
#Small Project	Proposed	1/1/2018	4/27/2018
#Stage Gate Template	Active	3/3/2017	1/15/2018
1 Salesforce	Approved - Not Started	6/6/2018	12/19/2018
2000 Tasks	Active	6/15/2012	9/28/2018

SaveSave & RunCancel↺↻

Design<<

GeneralDataDisplayVariable SettingsTeam

Headings

Column Header Configuration

Header font:

Proxima Nova

Header style:

Normal

Header size:

18

Header background-color:

#88cde5

Header text color:

#222222

Sorting

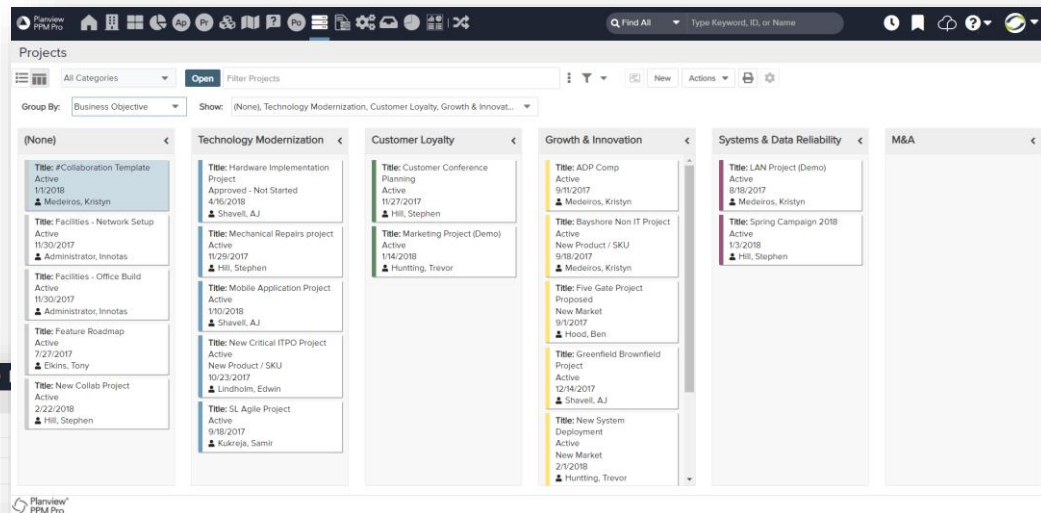
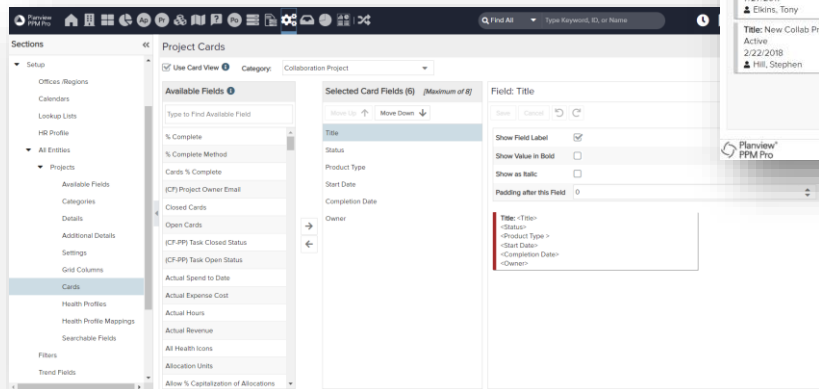
Drill Down

Aggregation ⓘ

Legend

Card View (Beta) – Target June 2022

- Will be available for Projects, Tasks, and Project Logs/Issues
- Control how cards will display per category & which fields display on the card



Special Announcement:

End of Support for Legacy Reports

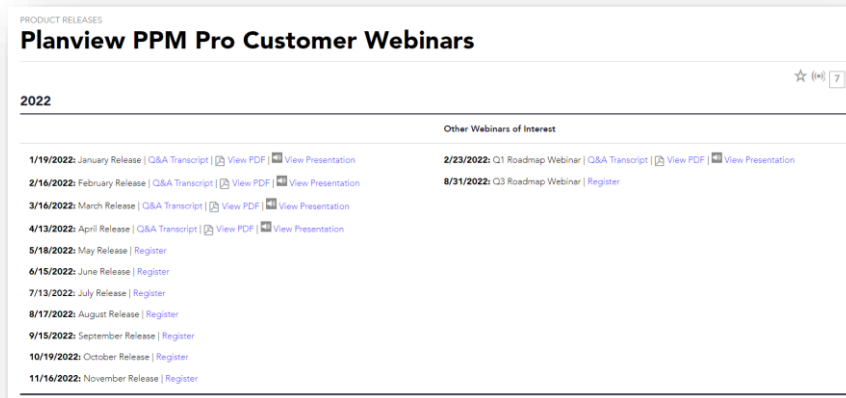
Legacy Reports *will not be deprecated*, instead we will *end ongoing support*

- End of Support: no defects addressed / no enhancements released
- Transition at your own pace
- Leverage report cookbook recipe files & report definition upload capability

Upcoming Webinars/Events

- June Release Webinar June 15th
- Register for next webinars in advance:

<https://success.planview.com/Planview PPM Pro/Release Information/Customer Webinars>



The screenshot shows a webpage titled "Planview PPM Pro Customer Webinars" under the "PRODUCT RELEASES" header. It features a list of webinars for the year 2022, organized by month. Each entry includes the date, release name, and links for Q&A transcripts, PDFs, and presentations. A "Register" link is provided for each webinar. A sidebar on the right lists "Other Webinars of Interest" for Q1, Q2, and Q3 2022. The page also includes a star icon and a notification bell icon in the top right corner.

2022	
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 Q&A Transcript View PDF View Presentation	
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	



Frankfurt, Germany

June 14, 2022

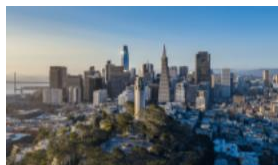
[Register now →](#)



London, UK

June 16, 2022

[Register now →](#)



San Francisco, CA

June 22, 2022

[Register now →](#)

planview.

PLANVIEW DAY 2022 ROADSHOW

[Learn More](#)



We invite you to join us for a new series of live, in-person events taking place in major cities across the three continents – **The Planview Day Roadshow!**

Hosted in six cities across the globe, the Planview Day Roadshow events are FREE, one-day, in-person premier customer forums, focused on networking, hands-on workshops, and customer stories, along with keynotes and sessions from Planview experts and executives. High-level agenda topics include:

- Executive keynote from Planview's CEO
- Planview's Product vision
- Targeted Planview-led sessions focused on key solution areas
- Peer-to-peer customer stories
- Hands-on workshops/networking and roundtables
- Genius Bar
- And more!

The Roadshow events offer incredible opportunities for face-to-face business networking and professional development.

Keynote Speakers



Razat Gaurav
Chief Executive Officer
Planview, Inc.



Louise Allen
Chief Product Officer
Planview, Inc.

Visit the [Planview Day Roadshow Events Page](#) to learn more and register for a session near you!



Chicago, IL

June 28, 2022

[Register now →](#)



Washington, DC

June 30, 2022

[Register now →](#)



Sydney, Australia

July 12, 2022

[Register now →](#)



Q&A

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Thank You