



PPM PRO CUSTOMER WEBINAR: AUGUST 2022 RELEASE

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

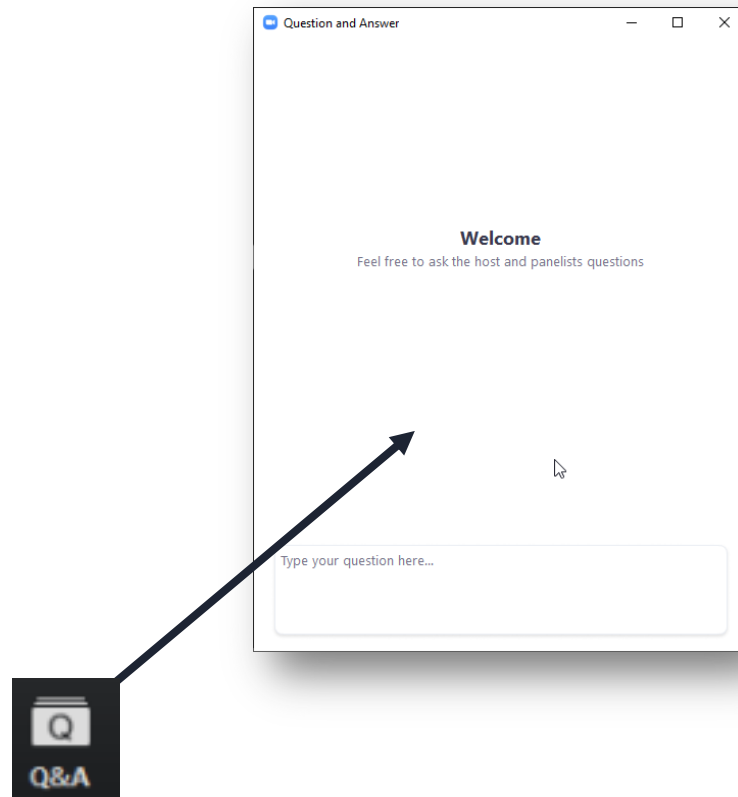


PPM PRO CUSTOMER WEBINAR: AUGUST 2022 RELEASE

PPM Pro Product Posse: Yessica Archilla, 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



Merge/Replace Financial Summary Structures

- Merge
 - Additive in nature
 - Will attempt to keep both structures in place
 - Reorganization of the structure might happen
- Replace
 - Existing components will be removed (deleted)
- Financial Summary Settings stay the same on receiving project
- Manually entered values in receiving project will be preserved where possible under both options.

Replace Financial Summary Structure

×

Choose a project below. That project's financial summary structure will be used in the projects you selected.

Project:

Agile - Augment Financials

⋮

Changing the financial summary structures does not affect existing manually entered values in the projects you selected, provided the new structure has the same fields. Merging financial summary structures will be additive in nature and merge your existing structure with the source structure.

Please be aware that replacing financial summary structures will **delete** existing entries in the projects selected and replace the structure with that of the source project.

Merge

Replace

Do Not Replace

New Display options for Totals

Save
Save & Run
Cancel
↶
↷

Design

General
Data
Display
Variable Settings
Team

Headings

Data

Show zero values:
Show as zero

Time Series and Totals columns:
Show Time Series and Totals columns
Show Time Series columns only
Show Total columns only

Sorting

Drill Down

Aggregation

Legend

- Available for **List: Time Series reports**
- New Data Display options
 - Show Time Series columns only
 - Show Totals columns only
- Export is WYSIWYG

Owner	% Complete	All Costs/Expenses - Actuals	May '23		Jun '23		Jul '23		Aug '23	
			Actual Hours	Staffed Demand Hours	Actual Hours	Staffed Demand Hours	Actual Hours	Staffed Demand Hours	Actual Hours	Staffed Demand Hours
Gold, Anthony	5%	\$0.00	44.00	0.00	44.00	0.00	44.00	0.00	44.00	0.00
Cabrera, Filipe	5%	\$0.00	5.00	244.80	5.00	244.80	5.00	244.80	5.00	244.80
Gold, Anthony	5%	\$0.00	13.00	0.00	13.00	0.00	13.00	0.00	13.00	0.00
Hill, Stephen	300%	\$0.00	603.40	890.51	603.40	890.51	603.40	890.51	603.40	890.51
Kukreja, Samir	39%	\$0.00	48.00	1,038.00	48.00	1,038.00	48.00	1,038.00	48.00	1,038.00
Dorley, Maria	300%	\$41,995.00	599.50	50,200.20	599.50	50,200.20	599.50	50,200.20	599.50	50,200.20
Dorley, Maria	4%	\$0.00	987.00	2,006.55	987.00	2,006.55	987.00	2,006.55	987.00	2,006.55
Kukreja, Samir	999%	\$0.00	24.00	15,320.00	24.00	15,320.00	24.00	15,320.00	24.00	15,320.00
Gold, Anthony	6%	\$1,260.00	82.00	2,058.84	82.00	2,058.84	82.00	2,058.84	82.00	2,058.84
Elkins, Tony	900%	\$0.00	1.00	41,541.24	1.00	41,541.24	1.00	41,541.24	1.00	41,541.24
Kukreja, Samir	99%	\$15,679.89	557.83	52,268.72	557.83	52,268.72	557.83	52,268.72	557.83	52,268.72
Cabrera, Filipe	700%	\$0.00	1,357.00	2,034.40	1,357.00	2,034.40	1,357.00	2,034.40	1,357.00	2,034.40
Kukreja, Samir	49%	\$0.00	37.00	0.00	37.00	0.00	37.00	0.00	37.00	0.00
Packebush, Sherill	900%	\$102,270.00	1,227.00	60.00	1,227.00	60.00	1,227.00	60.00	1,227.00	60.00
Gold, Anthony	900%	\$0.00	93.00	2,864.79	93.00	2,864.79	93.00	2,864.79	93.00	2,864.79
Hill, Stephen	900%	\$0.00	1,278.00	752.00	1,278.00	752.00	1,278.00	752.00	1,278.00	752.00
Gold, Anthony	5%	\$0.00	5.00	1,128.39	5.00	1,128.39	5.00	1,128.39	5.00	1,128.39
Kukreja, Samir	900%	\$0.00	298.00	1,489.60	298.00	1,489.60	298.00	1,489.60	298.00	1,489.60
Hill, Stephen	25%	\$0.00	491.40	682.00	491.40	682.00	491.40	682.00	491.40	682.00
Jones, Margaret	25%	\$0.00	531.00	480.00	531.00	480.00	531.00	480.00	531.00	480.00
Hill, Stephen	900%	\$0.00	60.00	1,622.80	60.00	1,622.80	60.00	1,622.80	60.00	1,622.80
Dorley, Maria	4%	\$0.00	136.00	879.46	136.00	879.46	136.00	879.46	136.00	879.46
Gold, Anthony	1%	\$0.00	491.16	9,147.91	491.16	9,147.91	491.16	9,147.91	491.16	9,147.91

Coming Soon!

Latest Status Comment – New Fields

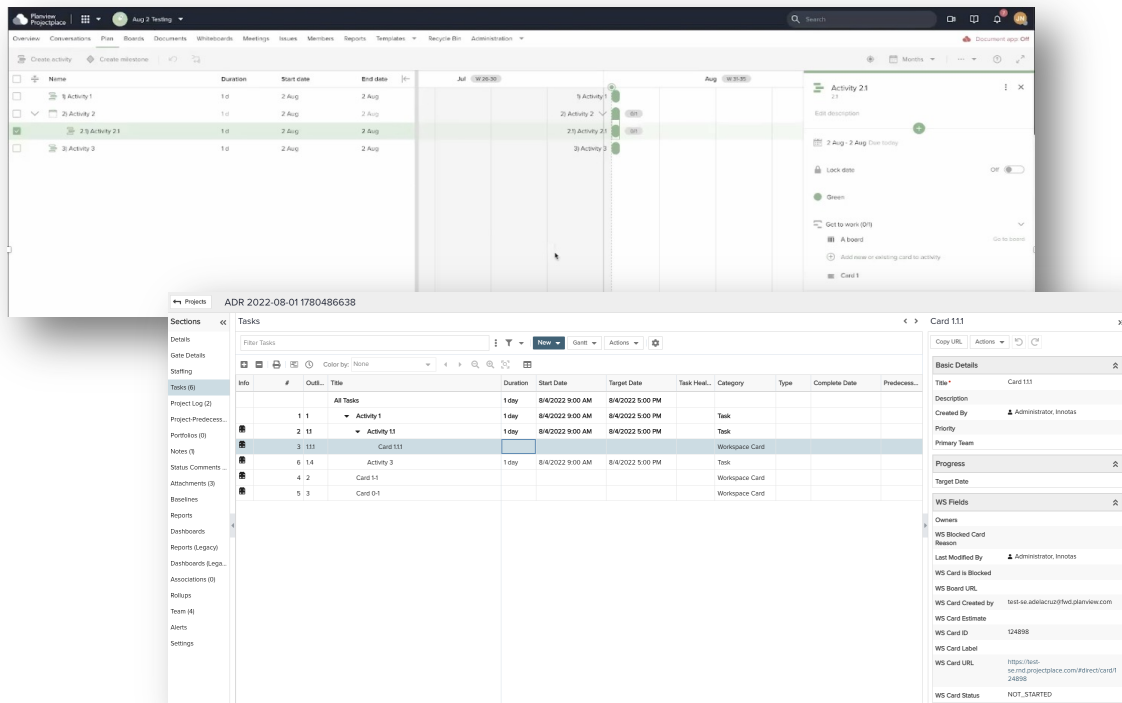
- New fields for Project **Status Comments: Latest**
 - Latest Status Comment (without prefixed metadata)
 - Title
 - Created By

Status Comments: Latest	Status Comment: Latest (new)
<div>Risk Identified August 2022 - Geld, Anthony 8/16/2022 4:38 PM CDT</div> <div>1. Cross-team dependencies for delivery</div> <div>2. Budget constraints</div> <div>3. Resources working on other projects</div> <div>-----</div>	<div>1. Cross-team dependencies for delivery</div> <div>2. Budget constraints</div> <div>3. Resources working on other projects</div> <div>-----</div>

Target: September 2022

PPM Pro – Projectplace V2 (Beta)

- Switch system of control on both PPM Pro and Projectplace
- Auto-mapped fields for Tasks & Activities
- PP Cards displayed in PPM Pro
 - Auto-mapped fields Read-Only
 - PPM Pro UDF's can be added
 - Supports time entry



Upcoming Webinars/Events

- Q3 Roadmap Webinar August 31st
- Planview Accelerate September 13th-14th
- Release Webinar September 15th
- Register for next webinars in advance:

[https://success.planview.com/Planview_PPM_Pro/Release Information/Customr_Webinars](https://success.planview.com/Planview_PPM_Pro/Release_Information/Customr_Webinars)

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Monthly Release Webinars	Other Webinars of Interest
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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	
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9/15/2022: September Release Register	
10/19/2022: October Release Register	
11/16/2022: November Release Register	

Q & A