



PPM PRO CUSTOMER WEBINAR: OCTOBER 2022 RELEASE

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

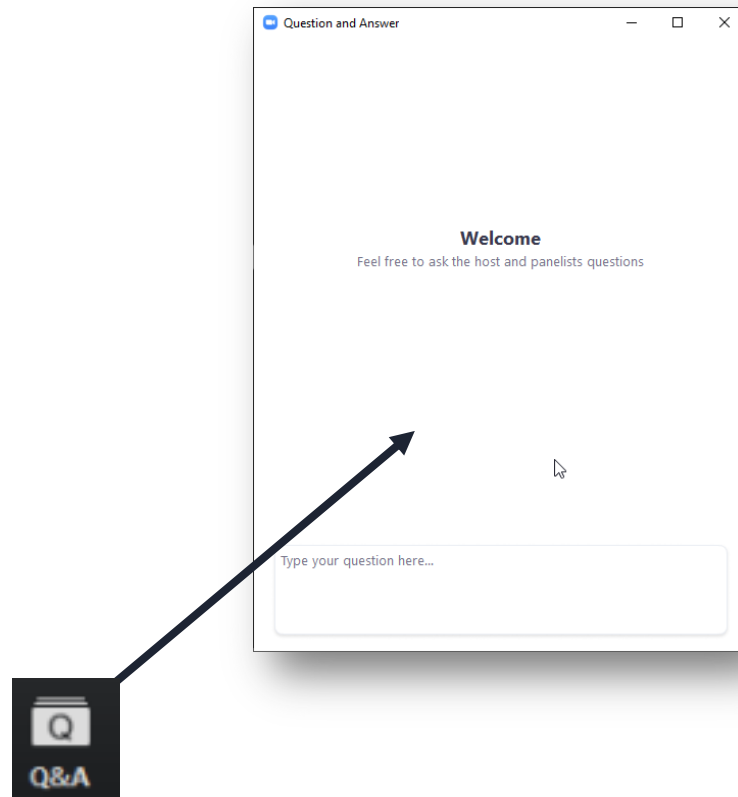


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PPM Pro Product Posse: Yessica Archilla, Stuart Baker, Lamar McMechan
Moderator: Malika Taouil, Customer Marketing Manager

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



Card View Sub-Group By

The screenshot displays the Planview PPM Pro interface. The top navigation bar includes links for Home, Portfolios, Projects, Requests, Resources, Reports, Dashboards, Log, Organization, Planning, and What If. A search bar is located on the right. Below the navigation bar, the 'Projects' section shows a total of 213 projects. The 'Group By' dropdown is set to 'Implied Status', and the 'Sub-Group By' dropdown is set to 'Overall RAG'. The main content area is divided into three columns representing different status groups: (None) (20), Proposed (95), and Open (98). Each column contains a list of project cards. The cards are further grouped by category, with categories like 'Amber' and 'Green' visible. Each card displays project details such as title, status, NPV, and target date.

- Sub-Group by any available single-selection list in your instance
- Setup for Group By and Sub-Group By "sticky" by Category
- If a list is selected to Group By, that same option will not appear as an option to Sub-Group By
 - Visualize (NONE) column requests by another grouping

Upcoming Webinars/Events

- Release Webinar November 16th
- Register for next webinars in advance:
https://success.planview.com/Planview_PPM_Pro/Release_Information/Customer_Webinars
- **New Inner Circle - Notification Service:**
https://info.planview.com/notification-service-inner-circle_user-group_gen_en_reg.html

Q & A