



PLANVIEW PPM PRO, PROJECTPLACE AND AGILEPLACE

April 2024 Update

Planview Product Management

Planview Product Management Team



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Product Manager
PPM Pro



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Product Manager
Cross Product Solutions

2024 Monthly Updates Schedule

PPM Pro

Release Webinar
Second Wednesday
of the month

Release Notes
Second Thursday of
the month

General Availability (GA)
Third Friday of
the month

AgilePlace

Release Webinar
Last Thursday of the
month

Release Notes
Weekly every Friday

General Availability (GA)
Continuous Delivery

ProjectPlace

Release Webinar
Last Thursday of the
month

Release Notes
Weekly every
Thursday

General Availability (GA)
Continuous Delivery
(Tu,Th)

IdeaPlace & TeamTap

Release Webinar
Last Thursday of the
month

Release Notes
Weekly every
Wednesday

General Availability (GA)
Weekly every
Wednesday

Coming Soon

Targeted within the next 2-3 months

AGENDA

- What's new
- Coming soon
- Announcements
- Questions

What's New

PPM Pro



Ashish Sahu
Product Manager

Recap

March Release

March

Performance Improvements

Performance improvements to financial summary reports when EAC and ETC fields are included.

Overallocation Warning

Resource over allocation warning is added in the project staffing when performing inline adding and editing of resources allocation.

GenAI Assistant

The screenshot displays the Planview PPM Pro user interface. The top navigation bar includes 'Home', 'Organization', 'Portfolios', 'Programs', 'Applications', 'Requests', 'Projects', and 'Project L...'. A search bar labeled 'Find All' is present. The left sidebar shows a 'Sections' menu with options like 'Teams', 'Timesheets', 'Expenses', 'Timesheet Approvals (0)', 'Expense Approvals (0)', 'Requests', 'Project Log', 'Tasks', 'Attachments', 'Resources', 'Notifications', and 'Filters'. The main content area is titled 'My Timesheets' and shows a date range of '1/4/2024 - 7/4/2024' and a status of 'Not Started'. Below this is a table with columns for 'Category', 'Title', 'Task / Type', 'Role', 'Billable?', and 'HTC'. An 'Add new' button is visible. An 'Assisted Help' chat window is overlaid on the right, displaying a list of frequently asked questions: 'How do I publish a dashboard?', 'How do I assign a permission profile to a team?', 'How to create dependencies in tasks?', 'How to calculate costs for a portfolio?', and 'How to connect a project in PPM Pro to ProjectPlace?'. A text input field at the bottom of the chat window contains the text 'What can I answer for you?'.

- Generative AI based, conversational help for all user roles
- Directly linked to the PPM Pro section of the Customer Success Centre, In-app help searches and summarizes answers directly to the application
- Contextual and focused conversation flow that improves application usability

Reporting

Performance Improvements

April

What

Increased performance for Financial summary, Financial summary reports and Historic timesheet reports in new reporting

Why

Observed increased report and dashboard runtime issues in some scenarios. The fix would shorten runtime.

The screenshot shows the Planview PPM Pro Financial Summary Report interface. The main area displays a table with columns: AC, Capitalized, Cash Flow, Create Date, Created By, Description, EAC, ETC, EV, ID, Labor, and Last Modified. The table contains several rows of financial data. On the left, there is a 'Design' panel with tabs for General, Data, Display, Variable Settings, and Team. The 'Data' tab is active, showing 'Available Fields' and a 'List Fields' section.

AC	Capitalized	Cash Flow	Create Date	Created By	Description	EAC	ETC	EV	ID	Labor	Last Modified
	Both Capitalized and Non-Capitalized	Inflow	2/21/2024	T aliquam id	Sed enim ut sem. Nisi scelerisque eu ultrices vitae auctor. Vivamus tellus in metus vulpate eu scelerisque felis imperdiet. Tricidunt nunc pulviner sapien et leo.	\$6784704			10000	Non-Labor	Acus vestibulum. Lorem ipsum d
\$31,873.67	Both Capitalized and Non-Capitalized	Outflow	1/14/2024		Uit nunc pulviner sapien et. Leo a diam sollicitudin tempor id eu n	\$59,460.97	\$23,634.02		10001	Labor	
\$1,236.93	Both Capitalized and Non-Capitalized	Outflow	12/18/2023	I tristique senectus et. Eget arcu dictum varius duiis at co	Im lobortis scelerisque fermentum. Tempor commodo ullamcorper a lacus vestibulum. Lorem ipsum dolor sit amet, cons		\$52,992.48	\$68,979.45	10002	Both Labor and Non-Labor	
\$65,949.83	Capitalized	Outflow		Is sit amet mas	Ctetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Sagittis eu volutpat odio facilisis mauris sit amet massa vitae. Erism diam vulpate ut ph	\$4182.70	\$22,360.40		10003	Non-Labor	
\$20,005.64	Both Capitalized and Non-Capitalized	Outflow		Diam vulpate ut pharetra sit amet aliqu	S duiis at consectetur lorem donec. Etiam dignissim diam quis enim lobortis scelerisque fermentum. Tempor co		\$5,403.47	\$4,764.65	10004	Both Labor and Non-Labor	Que habitant morbi tristique senectus et. Eget
	Both Capitalized and Non-Capitalized	Outflow		Ur adipiscing elit.		\$22,667.17	\$37,702.64	\$52,571.04	10005	Labor	

OData

Publishing ID



What

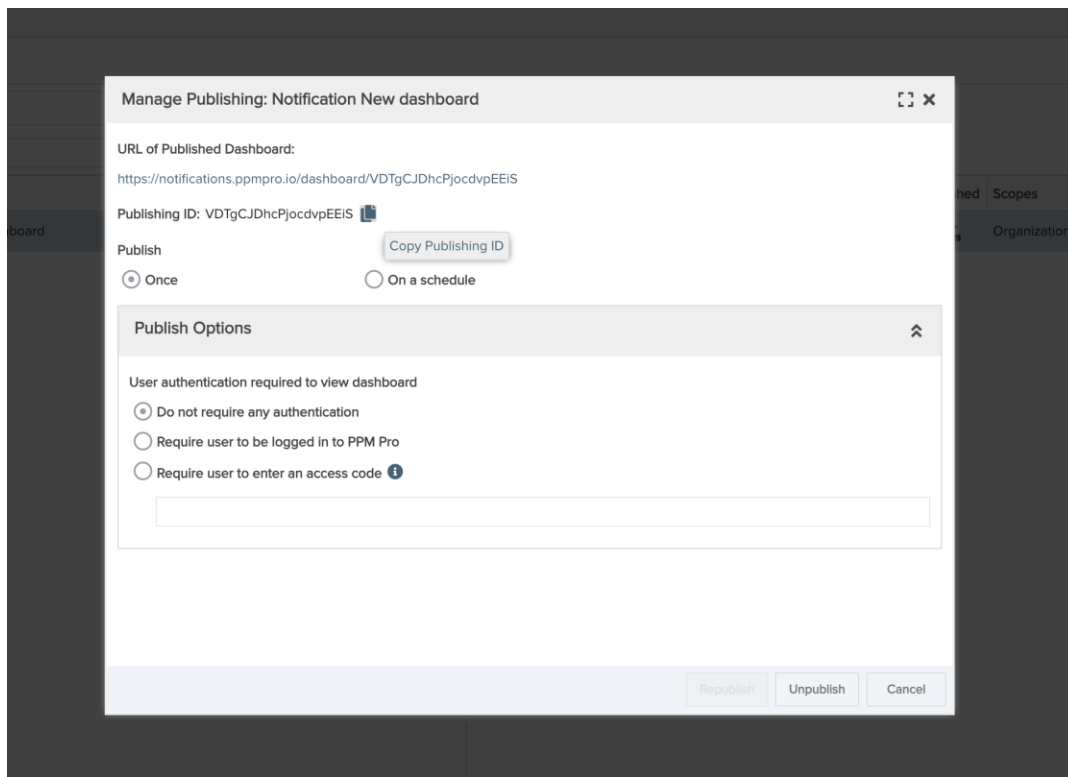
Publishing ID is now clearly added along with easy to copy button

Why

It was not clear initially what exactly is a Publishing ID and copy pasting could have extra characters

How

- Enabled by default
- Manage Publishing popup.



Demo

PPM Pro



Ashish Sahu
Product Manager

Coming Soon

PPM Pro



Ashish Sahu
Product Manager

Reporting and Connectors

May

Reporting

- Increase in number of fields supported in line trend report to 10
- Performance Improvements
- Home and Project Overview: Published dashboards load by default.

Connected Use cases

- Improvements to PPM Pro – ProjectPlace integration (V2): Tasks not being manually scheduled when synced

What's New

ProjectPlace



**Silvija
Doncev**
Product Manager
ProjectPlace



Save Boards Filters

Released

What

- Applied filter settings on a board can be saved.
- The filter can be personal or shared with other members

Why

Be able to quickly access commonly used board filter settings

Action

No action

The screenshot displays the Planview ProjectPlace interface for a 'Team Orion Sprint Board'. The 'FILTER' section is open, showing a dropdown menu with 'My work' selected. Below the dropdown, there are sections for 'SAVED FILTERS' (containing 'My work') and 'SHARED FILTERS' (containing 'Weekly sync meeting' by Silvana Christensen). A 'STATUS (0/8)' section shows 'Inbox' with 2 items and 'Grooming' with 1 item. A 'New saved filter' dialog box is overlaid on the right, with the name 'Weekly sync meeting' and the option 'Share with all board users' checked. The dialog has 'Cancel' and 'Save' buttons.



Set Start Date for Document Reviews

Released

What

For document reviews, users can set the Start Date indicating when the review should be started.

Why

Make it possible for users to plan and schedule reviews ahead of time

Action

No action.

Send for review

Review workflow Review

Add participants

Harshavardhan Rangan x

Start date

2024-03-20

Due Date

2024-03-22

Name

Solution Deliverables Review

Message

Please review the solution deliverables document. Once the review is complete, the document will be sent to executive team. Thanks for your input.

Lock while in review

Cancel Start review

Checklist Items Information in Odata

What

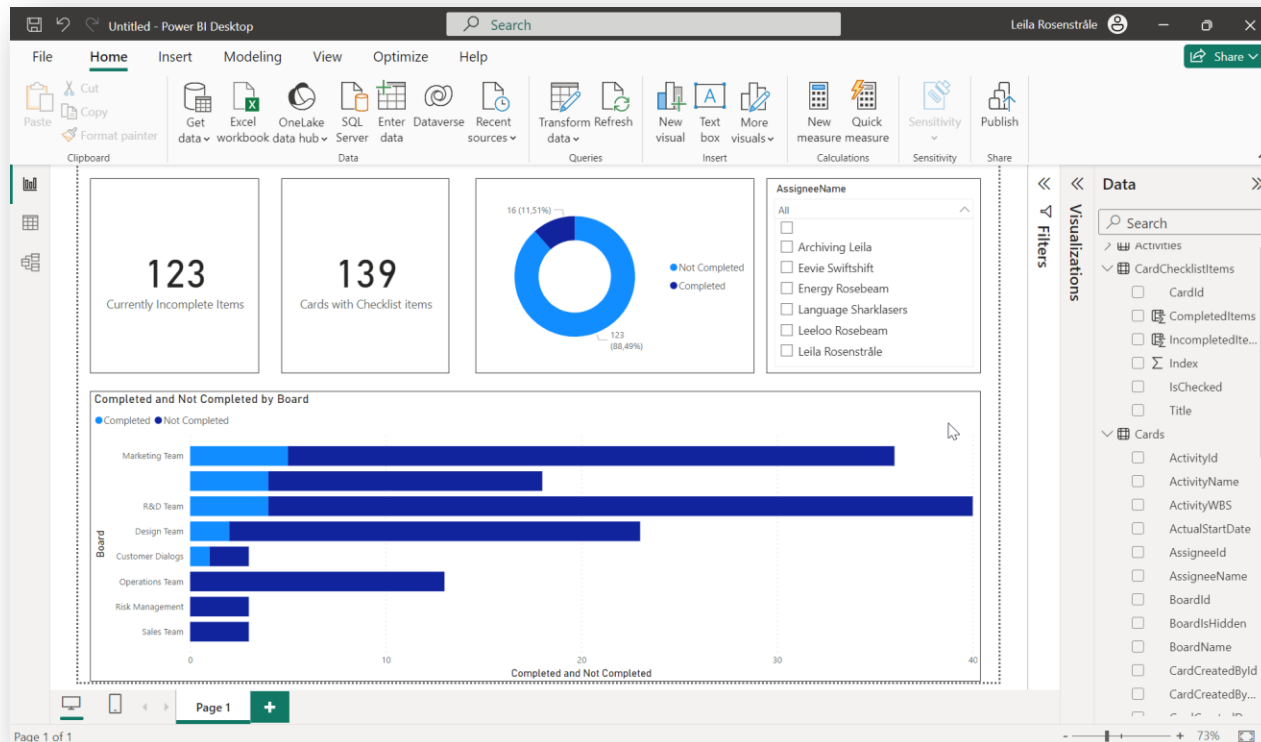
- Information about checklist items on cards is available on the Dataset for Project Managers.
- Name, status and order of checklist items is accessed

Why

Give users an additional level of information about work progress done on cards

Action

No action needed. [Information on CSC](#)



Portfolios Tool in the ProjectPlace App [iOS]

What

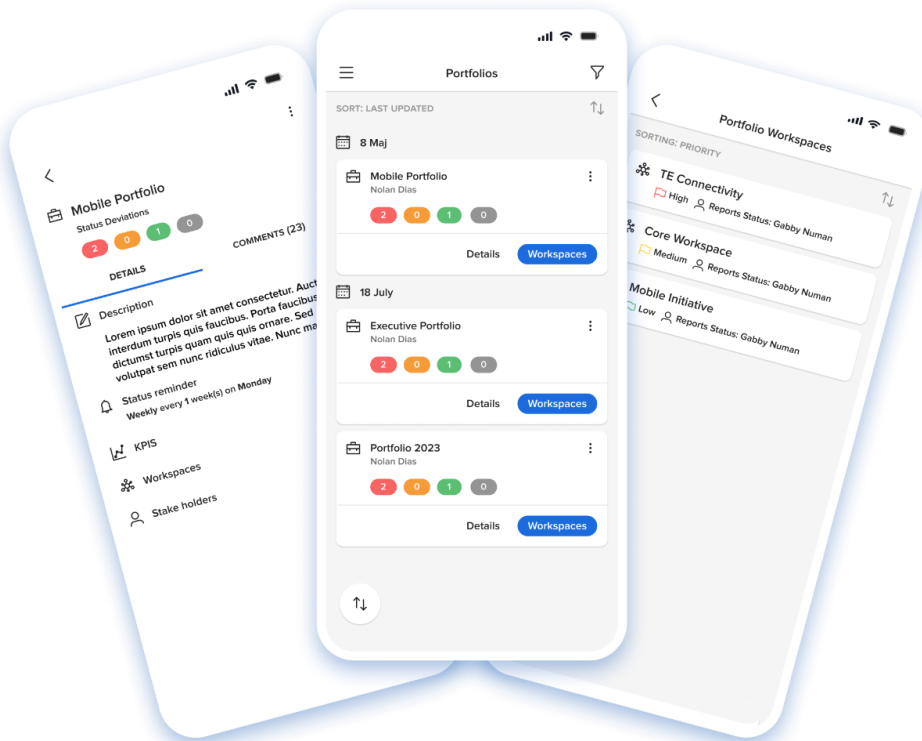
- View portfolios information in the ProjectPlace App for iOS.
- Group your portfolios by Name and Deviations
- Filter functionality available to refine results for your portfolios
- Available for the Android app

Why

Users on the move can easily monitor and track their portfolios' progress

Action

Update the app to the latest version.



Teams in the ProjectPlace App for iOS

What

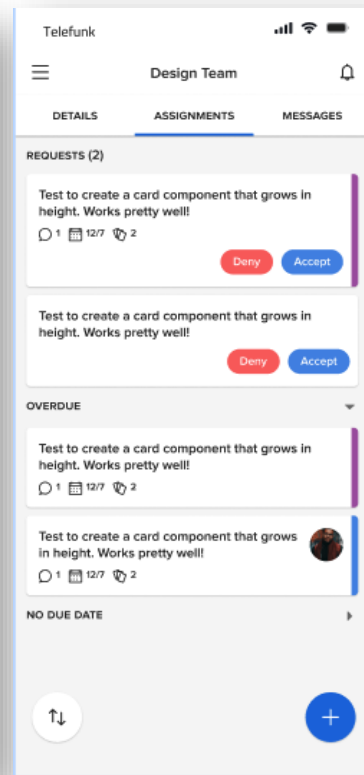
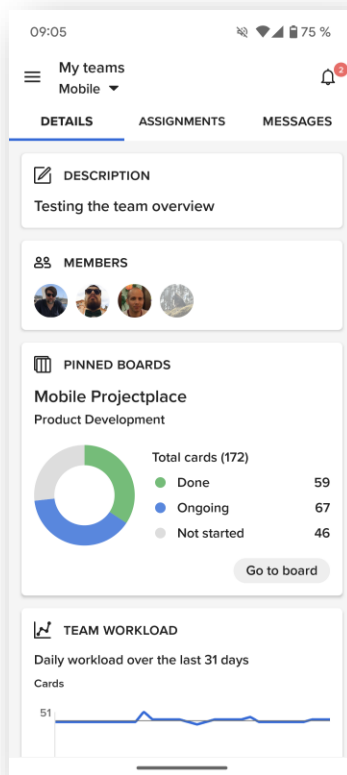
- In the ProjectPlace mobile app for iOS you can view ProjectPlace team details, assignments and messages.
- Handle incoming requests from project
- Available for the Android app

Why

Helps you stay updated with the ongoing work in your teams.

Action

Update the app to the latest version.



Coming Soon

ProjectPlace



**Silviya
Doncev**
Product Manager
ProjectPlace

Sentiment Analysis on Activities

What

- Sentiment analysis at the activity level derived from the aggregated sentiment of associated cards' comments

Why

- Provides project managers with an additional metric to assess the overall health of an activity.

Action

- Sentiment Analysis requires enrollment onto Planview Admin

			Name	Sentiment analysis	Start date
<input type="checkbox"/>			1) Untitled activity	Positive	16 Feb 2021
<input type="checkbox"/>			2) Untitled activity		16 Feb 2021
<input type="checkbox"/>			3) Untitled milestone		13 May 2021
<input type="checkbox"/>		>	4) R!		25 Jun 2021
<input type="checkbox"/>			5) Untitled activity		31 Oct 2022
<input type="checkbox"/>			6) Untitled activity		3 Feb

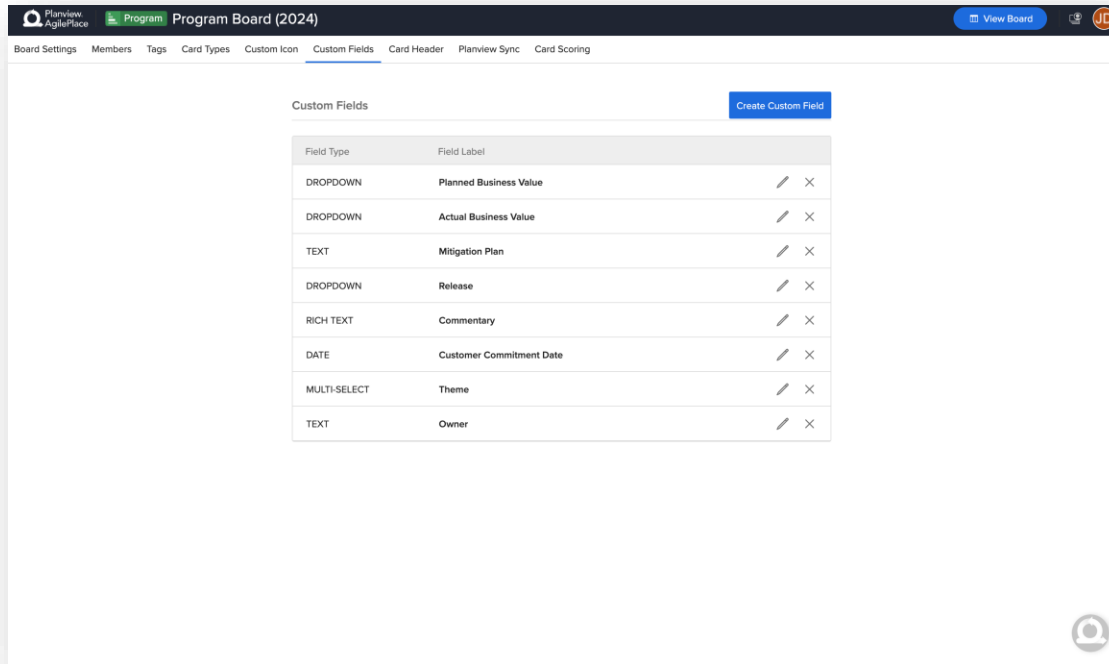
WHAT'S NEW

AgilePlace



Jon High
Sr. Product Manager
AgilePlace

Increased Custom Field Limit



What

- Increased custom field limit to 30 fields per board

Why

- Support strategic customer needs
- Provide access to more custom data

Board UI Uplift

What

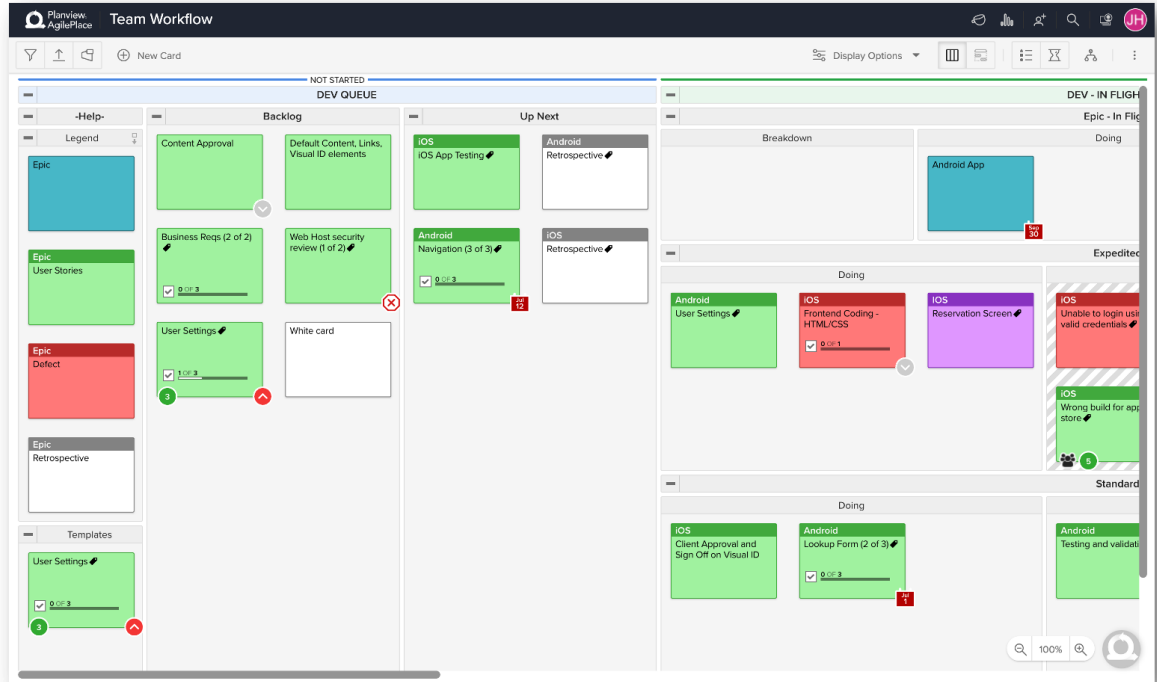
- Refreshed, lighter Board UI
- Display option for switching between modern and legacy

Why

- Make the AgilePlace Board UI feel more modern
- Provide more user customization of AgilePlace experience

Action

- Contact PM if you'd like to contribute to design feedback



COMING SOON
AgilePlace



Jon High
Sr. Product Manager
AgilePlace

Bulk-Edit Custom Fields

What

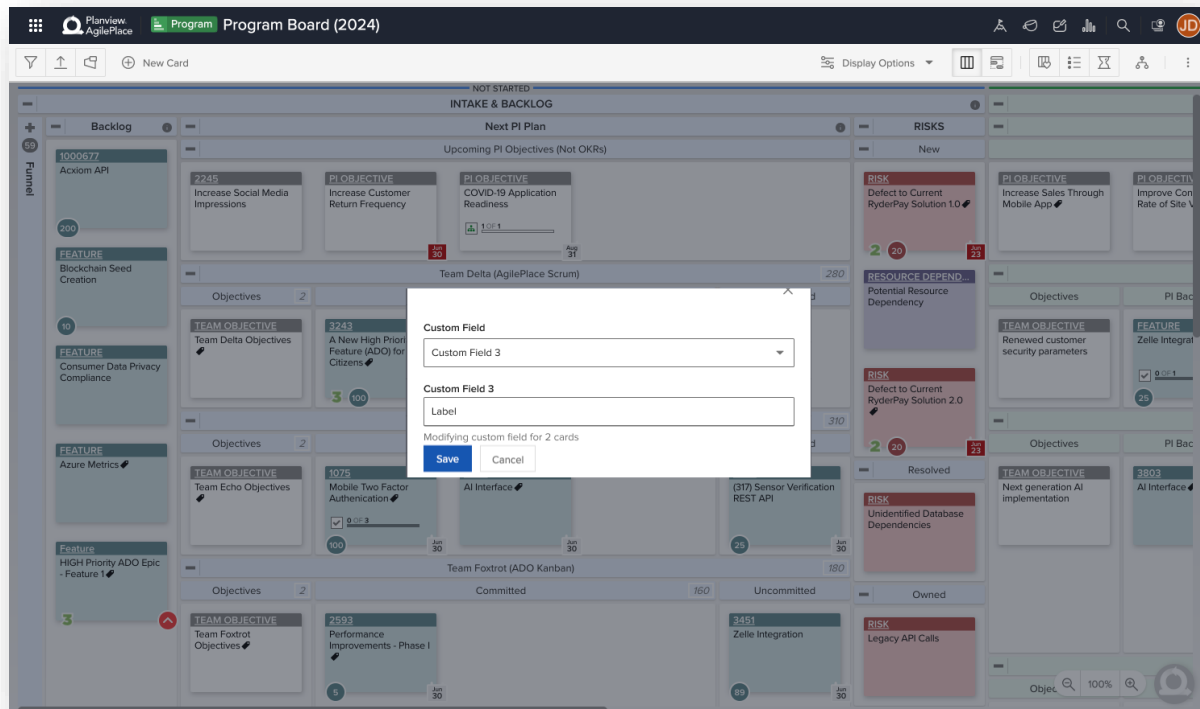
- Bulk-edit custom fields on a card

Why

- Improve ease of use around editing custom fields

Action

- None



New Card Design

What

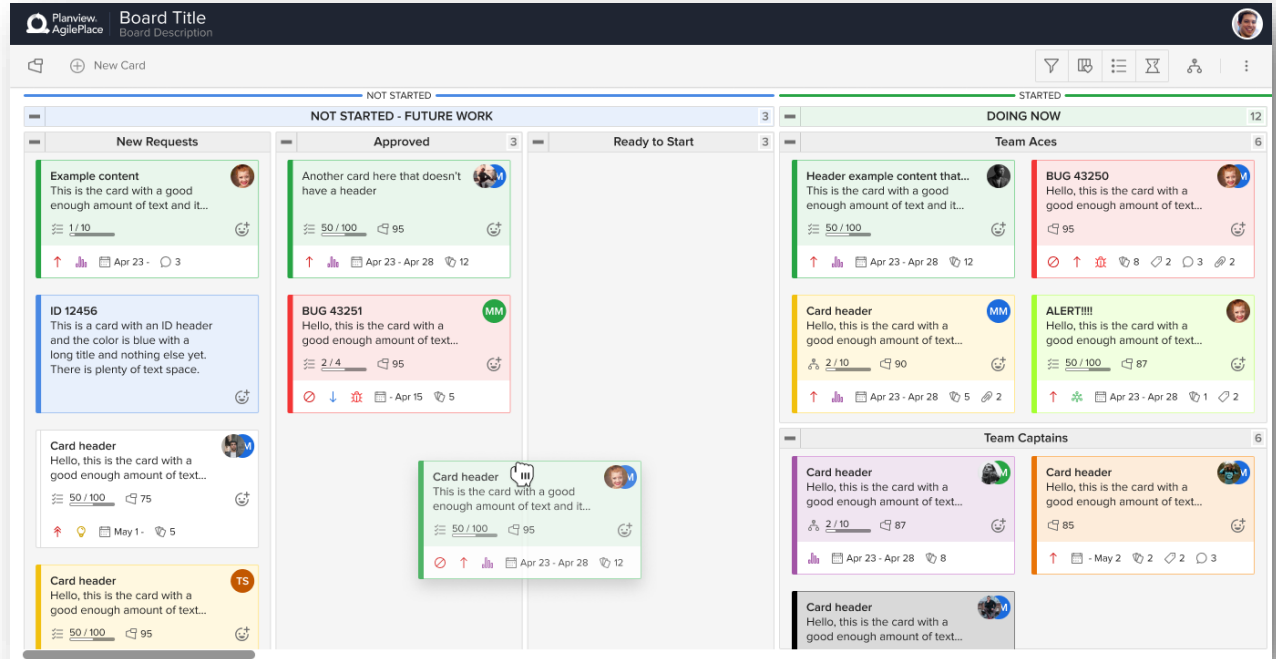
- Modern card design that will allow for more information
- Display option for switching between modern and legacy

Why

- Make AgilePlace cards feel more modern
- Set the foundation for future user customization on cards

Action

- Contact PM if you'd like to contribute to design feedback



Agile Planning GA

What

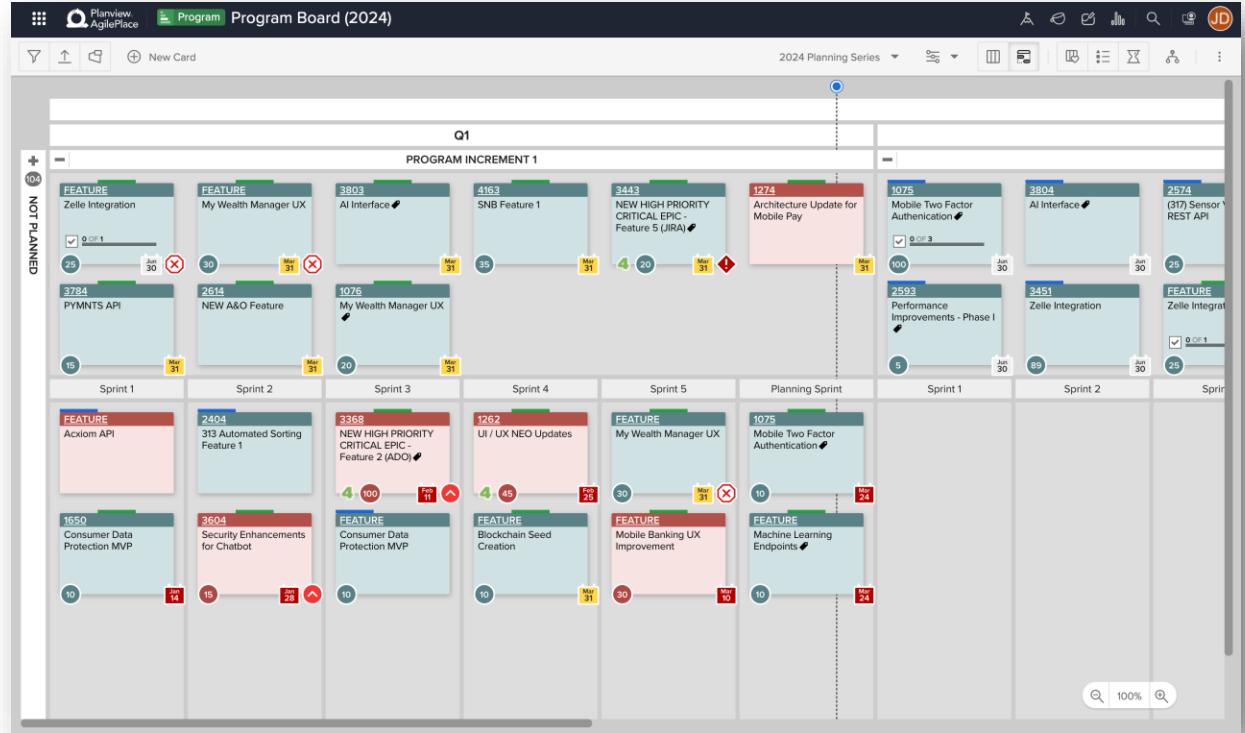
- Include Card Status indicator in Agile Planning view
- Ability to hide/show past increments in the Planning Increments dropdown and Agile Planning view

Why

- Continue to improve/enhance Agile Planning based on Lab's customer feedback
- Improve team's user experience around shorter-term planning, tracking, and delivering work

Action

- No action needed.



Copilot Labs & GA

Planview AgilePlace Copilot Demo

NOT STARTED

INTAKE & BACKLOG

Templates New Groomed Backlog

User Story User Story

Customer Feature: In-App Dashboarding

Internal

Enabler Subscription Management Enabler

FEATURE AI feature HO

FEATURE ALTS Structure

FEEDBACK Breakout Sessions were disorganized

OBJECTIVE COVID-19 Application Readiness

RISK

FEATURE Acicomm API

FEATURE Auto Connection to Experian Feature

FEATURE JI Important Feature

FEATURE Upgrade Mobile Platform API performance

FEATURE ChatBot

FEATURE CTK Brady Feature 02

FEATURE 26 GHz VST for 5G and WiFi Updated Feature 1

FEATURE Blockchain Seed Creation

FEATURE New User Onboarding Checklist

FEATURE Upgrade Mobile Platform API performance

FEATURE In-App Dashboarding

TRIBE OBJECTIVE COVID-19 Application Readiness

TRIBE OBJECTIVE Improve Conversion Rate of Trials

TRIBE OBJECTIVE Increase Social Impressions

OBJECTIVES

SQUAD OBJECTIVE Next generation AI implementation

FEATURE Accurate Data Analysis Enhancement

OBJECTIVES

SQUAD OBJECTIVE Renewed customer security parameters

3397 Right to Deletion

FEATURE Backend Payr Updates

OBJECTIVES

SQUAD OBJECTIVE API Reboot Metrics

FEATURE In-App Dashboarding

COPILOT Early Access

Hello! I'm here to help with your AgilePlace questions.

4:24 pm

Describe this board

Based on the data, this board appears to be used for tracking various types of work items, including features, objectives, risks, user stories, enablers, and releases. The work items, represented as cards, are at different stages of the workflow, which are indicated by the CardStatus field. The statuses include 'notStarted', 'started', and 'finished'.

The board includes cards with varying priorities, from 'normal' to 'high' and 'critical', which suggests a mechanism for focusing on the most important tasks. The 'Size' field indicates the estimated effort or complexity of the cards, with some cards having specific sizes assigned to them, while others have a size of 0, which could mean the size is yet to be determined or the card is not estimated in terms of size.

The 'PlannedStartDate' and 'PlannedFinishDate' fields provide a timeline for when the work is expected to begin and be completed, although not all cards have these dates filled in, which could mean that the planning phase is still in progress for those items.

The 'IsBlocked' field indicates whether a card is currently impeded, and based on the data, none of the cards are blocked, which is a positive sign for the flow of work.

What can I answer for you?

What

- Conversational Copilot UI to help summarize and analyze data and automate actions on an AgilePlace board

Why

- Innovate with cutting edge technology in meaningful ways for our customers
- Use GenAI to solve real, valuable use cases for customers

Announcements

Register Today for Our Annual Global Virtual Planview Accelerate 2024!

planview **accelerate**



May 14-15, 2024
Sessions & Keynote Speaker to come, stay tuned!



Interested in University of Planview classes? Sign up for discounted classes [here!](#)



Registration Fee= \$99
(discounted from 2023!)



Discounted group rates available until April 30th:

- 5+ = \$75 per person
- 10+ = \$65 per person

[Register Now!](#)

Agenda Track Overview

- **Four Tracks - What customers will learn:**
 - **Close the Strategy to Execution Gap:**
 - As economic and technological forces rapidly change, demands for producing strategic value don't. Learn what's new from Planview that you use to create more value and hear from customer and Planview experts on how to become more strategic, adapt and modernize planning.
 - **Connected Customers:**
 - Get to know customer services organization and how our customers can take advantage of our offerings, touchpoints and services. Each session will showcase various customer-facing teams and distinct customer value of each team.
 - **Becoming a Value Centric Organization:**
 - Embrace the future of Digital Product Development with solutions that span planning, agile execution and continuous innovation in software delivery. This holistic approach allows organizations to deliver tangible value by aligning teams, optimizing workflows and creating products that truly resonate with customers. By centering every aspect of your software delivery around value, you can navigate the complexities of digital transformation, accelerate product delivery and achieve a competitive edge.
 - **Connected Value: Maximizing Impact from the Planview Platform:**
 - Explore new cross-platform capabilities in data science & AI, connectivity, collaboration, innovation and enhanced insights through the convergence of solutions. Discover how the Planview platform can help improve your organizations time-to-value, increase efficiency and de-risk strategic bets.
- **Planview Keynotes**
- **Customer Presentations**
- **Partner Presentations**
- **Roadmaps**
- **Virtual Networking**

Training Sessions

Thursday, May 16 from 9:00am - 12:00pm CT



ACCELERATE EXCLUSIVE

AdaptiveWork: Advanced Reporting

CLASS DESCRIPTION

This is a unique class only offered as part of Accelerate!

This course will showcase examples of business-critical reports created with AdaptiveWork's powerful reporting capabilities.

LEARNING OBJECTIVES

At the end of this course, you will be able to:

- Create reports with dynamic filters and visuals
- Build advanced reports using formula columns, time-phased data, and more
- Determine the correct object selection and order for the desired data results
- Design reports that scale for multiple users or teams

BACK BY POPULAR DEMAND

Managing Change at Your Organization

CLASS DESCRIPTION

Back by popular demand, this class we will include special content and live customer stories as part of Accelerate!

In this class, you'll learn key skills for leading change.

LEARNING OBJECTIVES

At the end of this course, you will be able to:

- Better manage organizational change management (OCM) at your organization
- Identify areas in need of change management
- Understand the required fundamentals to achieve successful OCM

You will also learn about:

- Do's, don'ts and tips for OCM

NEW & IMPROVED

Portfolios: Highlights of Ad-hoc Analysis

CLASS DESCRIPTION

We've updated this popular Public Training Class to have fresh new content and an updated single-session agenda exclusively for Accelerate!

Highlights of Ad-hoc Analysis training for Planview Portfolios is an interactive class that teaches how organizations can perform dynamic analysis and create interactive Power BI reports on projects, resources, and financial data to meet the reporting needs of the organization.

LEARNING OBJECTIVES

At the end of this course, you will be able to:

- Understand Ad-hoc Analysis Concepts and Data Sources
- Create and Deploy Reports with Power BI

University of Planview



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CONTACT US

Do you need help with your University of Planview account, or have other learning support needs?

[CONTACT US](#)

**2024
Classes
Available
Now!**

Now Available in Labs!

Registration available
in Customer Success
Center

Agile Planning

Available with Feature Flag enabled

Generative AI – AgilePlace

Available with Feature Flag enabled

Join us!

Provide your valuable perspective through hands on participation in one of our labs. For more information, visit the [Planview Labs Program page](#) at the Customer Success Center.



Inner Circle Registrations Now Open!

Analytics and Reporting

Driving future requirements of A&R for Planview Platform

Planview.Me

Collaborate and guide persona-driven actionable experiences

Planview Copilot

Explore how Generative AI can help you address your strategy through delivery challenges

Planview Roadmaps

How do you plan, visualize and share initiatives within your organization?

OKRs

Driving future requirements of OKRs for Planview Platform

Enterprise Architecture

How can we improve experience for Enterprise Architects?

IdeaPlace NextGen

How to leverage innovation management to meet objectives?

New

Join us!

Provide your valuable perspective and learn more about where we're headed! For more information, visit the [Inner Circle Program page](#) at the Customer Success Center.



Join our Upcoming Webinars!

APRIL 29TH, 08:00 CT/09:00 ET/15:00 CEST

Workspace Administration Enablement



New

APRIL 30TH, 08:00 CT/09:00 ET/15:00 CEST

Workspace Member Enablement



New

MAY 1ST, 08:00 CT/09:00 ET/15:00 CEST

Account Administration Enablement



New

Join us!

Go to <https://success.planview.com/webinars> for more information and registration



Questions?

Thanks!