PPM Pro Customer Webinar: May 2018 Release
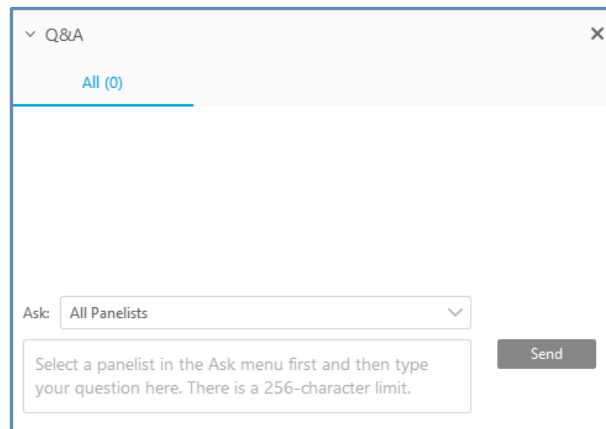
Jennifer Rose, PPM Pro Product Manager
Heather Pritchard, PPM Pro Senior Engagement Manager

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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 top right of the Webex window

- Webinar is being recorded

- Recording and slides will be shared

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Today's Agenda

- Monthly Release Process
- About Sandboxes
- New Features
  - Project Financials
  - GDPR Support
- Existing Beta features
  - KPI Trend Reports
- Features coming soon
- Q&A

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Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro

Release Information

New Features and Release Notes

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Monthly Release Schedule

First Friday
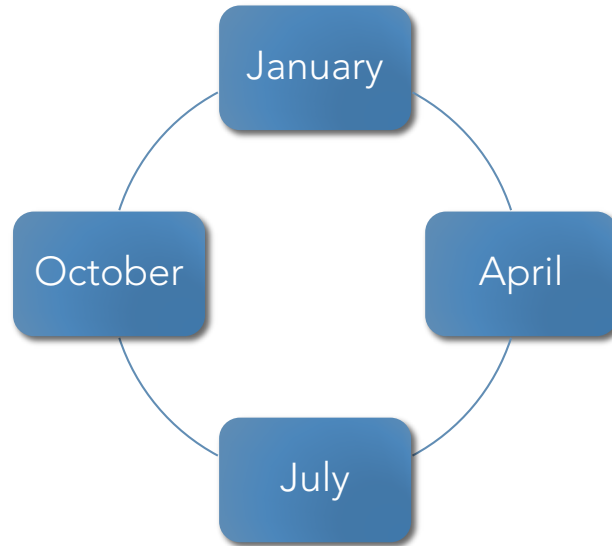- Release Notes Published

Second Friday
- Release deployed to sandbox environments

Third Friday
- Release deployed to production environments

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Features move from Beta to GA once a quarter

January

April

July

October

- Between GA releases, Beta features are available in sandboxes
- Beta features can be enabled in production environments by request

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Get early access to features in your sandbox

- A sandbox is a snapshot of your production environment
- Beta functionality is enabled in sandboxes by default
- Don't have one? Contact your Account Manager (additional fee)

Note: We can't refresh your sandbox data between the second and third Fridays of the month

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Current Month's Feature Status

Beta

Project Financials
KPI Trend Report Source
OData feed

GA

GDPR support

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May Release – New Features

- Project Financial Entries (Beta)
- GDPR Support (GA)

Project Financial Entries

Financial Entries

New Actual | New Forecast ▾ | Actions ▾

Info	Title	Forecast Amount	Actuals Amount ↑	Entry From Date	Entry To Date	Cash		Apr '18	May '18	Jun '18	Jul '18	Aug '18
	Total	($19,000.00)	($12,575.00)									
▾	General Hardware	$1,000.00	$1,750.00	4/17/2018		Outflow		$1,000.00				
	Juniper Switches		$800.00	5/17/2018		Outflow			$800.00			
	Cisco Switches		$950.00	4/17/2018		Outflow		$950.00				
▾	PCs and Laptops	$8,000.00	$1,825.00	4/17/2018	8/16/2018	Outflow		$1,600.00	$1,600.00	$1,600.00	$1,600.00	$1,600.00
	Dell Workstations		$1,825.00	4/1/2018	10/1/2018	Outflow		$600.00	$600.00	$600.00		
▾	External Labor	$10,000.00	$9,000.00	5/3/2018	6/14/2018	Outflow			$5,000.00	$5,000.00		
	Super People Con...		$9,000.00	5/5/2018	6/7/2018	Outflow			$4,500.00	$4,500.00		

Task-level financials running in parallel, eventually deprecated

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Project Financial Entries

Configure using self-service administration facility (SSA)

Sections «

- ▶ Organization
- Permission Profiles
- Users
- Groups
- ▼ Setup
  - Offices /Regions
  - Calendars
  - Lookup Lists
  - HR Profile
  - ▼ All Entities
    - ▼ Financial Entries
      - Available Fields
      - Categories
      - Forecast Details
      - Actuals Details
      - Grid Columns
      - Searchable Fields
  - Filters

Financial Entry Available Fields (26)

Filter by Title   New ▾   Actions ▾

Title	Field Type	Field Access	Field Origin	References
Actuals Amount	Money	Unrestricted	Standard	
Capitalized	Checkbox	Unrestricted	Standard	
Cash	String	Unrestricted	Standard	
Category	Select List	Unrestricted	Standard	
Create Date	History Dat...	Unrestricted	Standard	
Created By	AutoCompl...	Unrestricted	Standard	
Description	String	Unrestricted	Standard	
Entry From Date	Date	Unrestricted	Standard	
Entry To Date	Date	Unrestricted	Standard	
Financial Entry Type	String	Unrestricted	Standard	
Forecast Amount	Money	Unrestricted	Standard	
ID	Integer	Unrestricted	Standard	
Invoice Date	Date	Unrestricted	Standard	
Invoice Number	String	Unrestricted	Standard	
Labor	Checkbox	Unrestricted	Standard	

Field: Actuals Amount »

Save   Cancel

Field Access «
Field is mandatory.

Common Properties ⓘ «

Method ID	30056
Field Origin	Standard
Title	Actuals Amount
Description	The monetary amount for this actual
Field Type	Money
Show on Reports	All
Show in Filters	Yes
Details Display Name	
Grid Display Name	

Variable Properties ⓘ «

Field is Required? ⓘ	✔
Default Value	$

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GDPR Tenets

GDPR	Description	PPM Pro Support
Right to be forgotten	Ensure that there is no information still in a system that could be used to personally identify a person who has opted out or is no longer a user of that system.	PPM Pro provides guidance for manually anonymizing personal information reflected in user interface elements. In addition, PPM Pro provides a product feature that programmatically anonymizes not only UI artifacts that present personal information, but also artifacts at deeper levels of the application, such as history tables and logs
Right to opt in	Do not collect data on a person until that person grants permission/that person opts in.	The customer is responsible for obtaining the potential user's agreement before adding a resource to PPM Pro.
Right to receipt of data	Respond to a former user's request for what information about them may still be in the system ("what info do you have on me?").	The customer is responsible for responding to this request and extracting any remaining information through reports or other means; there is no additional support from PPM Pro.

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GDPR Support

- Automatic Activation
- Ad Hoc Activation
- Manual Compliance

Anonymize Terminated Resource Data? ✕

Choosing to anonymize this terminated resource will replace all of the resource's required field values with generic values and remove all other field values throughout the application. If the resource was associated with a user, the user will be similarly anonymized. To ensure complete anonymity, you will still need to manually verify that the resource was not individually named in other fields, such as text fields or lookup list items. Note that anonymization cannot be reversed.

Would you like to anonymize this terminated resource?

| Anonymize | Do Not Anonymize |

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GDPR Support

- Customer Care ticket to enable capability
  - Automatic Activation
  - Ad Hoc Activation
- No changes needed
  - Manual Compliance

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Enhancements

- Can adjust effective dates for internal rates 1-365 days in past. Customer-settable limit. Previous limit was 90 days.

- The Copy Tasks feature now limits the number of tasks that can be created during one copy session to 1000.

Existing Features

- KPI Trend Reports (Beta)
  - Collect trend field data (ongoing)
  - Configure reports

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Coming Soon

- Intake 1.0 (Requests Revamp)

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Upcoming Webinars

- June Release Webinar
  - June 13, 10:30am CDT
- OData Webinar
  - July – date TBA

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Q&A

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Thanks for watching!

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