



PPM Pro Customer Webinar: June 2018 Release

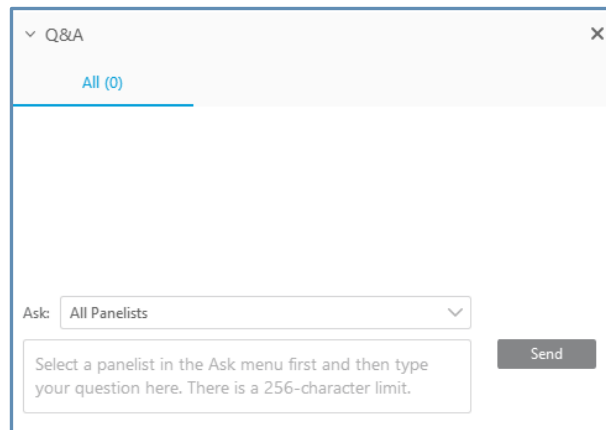
Jennifer Rose, PPM Pro Product Manager

Heather Pritchard, PPM Pro Senior Engagement 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 top right of the WebEx window
- Webinar is being recorded
- Recording and slides will be shared



Today's Agenda

- Monthly Release Process
- About Sandboxes
- New Features
 - Requests Revamp Phase 1
 - Dashboard enhancements
- Existing Beta features
 - Project Financials
 - KPI Trend Reports
- Features coming soon
- Q&A



Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro



Release Information



New Features and Release Notes



Monthly Release Schedule

First
Friday

- Release Notes Published

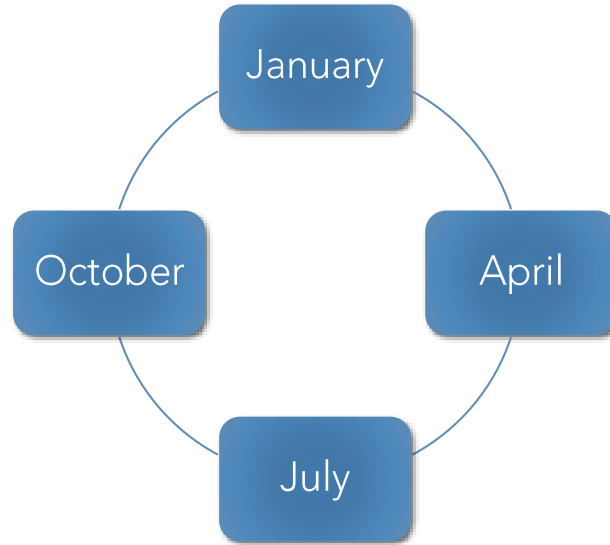
Second
Friday

- Release deployed to sandbox environments

Third
Friday

- Release deployed to production environments

Features move from Beta to GA once a quarter



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

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



Current Month's Feature Status



Beta

Requests Revamp Phase 1
Project Financials
KPI Trend Report Source
OData feed



GA

June Release – New Features

- Requests Revamp (Beta)

Request Revamp

- Existing requests renamed to “Legacy Requests”
- New Requests tab in top navigation upon opt-in
- Can opt-in in sandbox and/or production

Request Revamp

- Initial features
 - Requests are composed in “standard” PPM Pro UI
 - Configured using Self-Service Administration
 - New graphical, status-based card view
 - Associate request with new and existing projects
 - New Status field
 - Permission profile functionality

Requests – Composing View

Request UI
matches other
areas of product

Planview PPM Pro

Find All Type Keyword, ID, or Na

All Requests

Filter

(None) (1)

1975852187
Outlook Upgrade
Jones, Margaret
6/22/2018

New Request

Basic Details

Title *

Requester Jones, Margaret

Status

Project Information

Business Sponsor

Division

Brief Description of Proposed Solution

Scoping Estimates

Desired Start Date

Desired Completion Date

Please enter values for required fields.

Save Cancel

Planview PPM Pro Release Webinars

Requests – Card View

Card-based view
allows request
movement based
on status

The screenshot displays the 'All Requests' section of the Planview PPM Pro application. The interface features a dark top navigation bar with the Planview PPM Pro logo, a home icon, and various tool icons. A search bar on the right of the navigation bar contains the text 'Find All' and 'Type Keyword, ID, or Na...'. Below the navigation bar, the main content area is titled 'All Requests' and includes a 'Filter' input field, a 'New' button, and an 'Actions' dropdown menu. The requests are organized into six vertical columns, each representing a different status: '(None) (1)', 'New (2)', 'In Progress (1)', 'Approved (1)', 'Rejected', and 'On Hold'. Each column contains one or more request cards. The 'New' column has two cards: one for '1975952189 Critical Request Jones, Margaret 6/20/2018' and another for '1975952104 New Product Launch Richards, Steve 8/1/2018'. The 'In Progress' column has one card: '1975952098 Request for New Work Jones, Margaret 6/12/2018'. The 'Approved' column has one card: '1975952191 Tablet Deployment Jones, Margaret 6/29/2018'. The 'Rejected' and 'On Hold' columns are currently empty. At the bottom of the screen, there is a link to 'Planview PPM Pro Release Webinars'.

Planview PPM Pro Release Webinars

Request Revamp

- Coming soon
 - Ability to copy notes/attachments to associated entities
 - Reporting
- Coming later
 - Gates
 - Approvals
 - Ability to associate and map requests with tasks, project logs
 - Data Import (new)
 - API

Enhancements

- Run dashboards as User or Owner
- Rerun published dashboards if logged in
- Relative dating allowed for dashboard components

Existing Features

- Project Financials (Beta)
 - Forecasts, actuals, API support
 - Reporting, data import targeted for July
- KPI Trend Reports
 - Beta, GA targeted in July)
 - Collect trend field data (ongoing)
 - Configure reports
 - In Beta, GA targeted for July

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

\$

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

Coming Soon

- Project Financials Phase 2
 - Reporting
 - Rollups
 - Calculated fields
 - Filters
 - Data import



Upcoming Webinars

- OData Webinar
 - July 10, 10am CDT
- July Release Webinar
 - July 18, 10:30am CDT



Q&A





Thanks for watching!

