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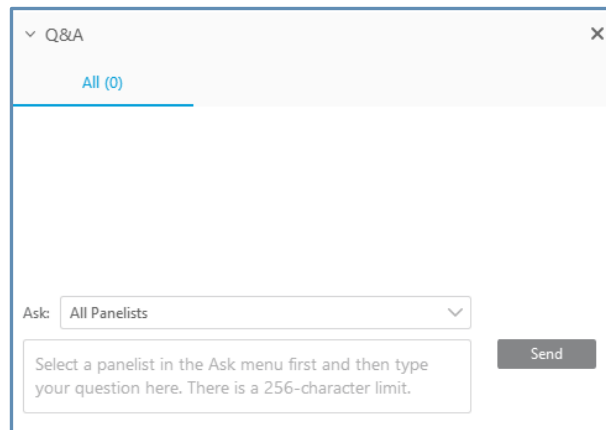
Jennifer Rose, PPM Pro Product Manager
Heather Pritchard, PPM Pro Senior Engagement Manager

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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
  - Requests Revamp Phase 1
  - Dashboard enhancements
- Existing Beta features
  - Project Financials
  - 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
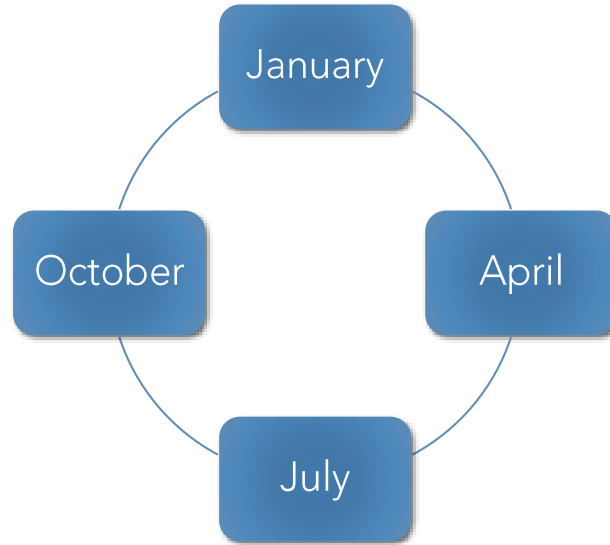- Release Notes Published

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

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

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

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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

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Requests – Card View

Card-based view allows request movement based on status

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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

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Enhancements

- Run dashboards as User or Owner

- Rerun published dashboards if logged in

- Relative dating allowed for dashboard components

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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

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Project Financial Entries

Configure using self-service administration facility (SSA)

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Project Financial Entries

Financial Entries

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

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Q&A

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Thanks for watching!

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