



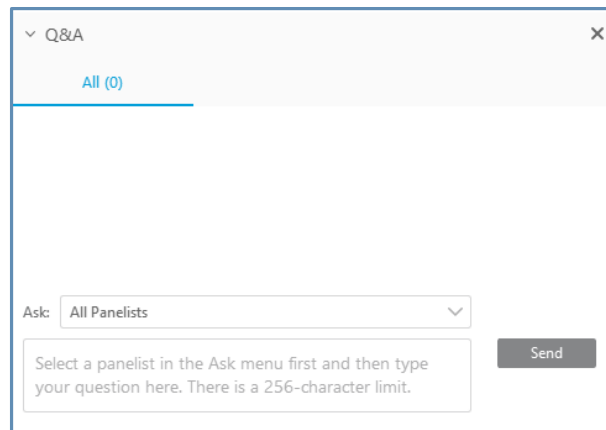
PPM Pro Customer Webinar: October 2018 Release

Jennifer Rose, PPM Pro Product Manager
Sherrill Packebush, PPM Pro Product Manager
Heather Pritchard, PPM Pro Managing Consultant



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



A screenshot of a Q&A interface within a WebEx window. The window has a title bar with a dropdown arrow and the text 'Q&A', and a close button 'X' in the top right corner. Below the title bar, there is a header area with the text 'All (0)' in blue. The main area is a large white box for questions. At the bottom, there is a section labeled 'Ask:' with a dropdown menu currently showing 'All Panelists'. Below the dropdown is a text input field with placeholder text: 'Select a panelist in the Ask menu first and then type your question here. There is a 256-character limit.' To the right of the input field is a grey 'Send' button.



Today's Agenda

- Monthly Release Process and Sandboxes
- Planview Horizons Recap
- Rolling Beta features
 - Spreadsheet-Style Task Editor
 - Requests Revamp
- New Features and Enhancements
 - T&E user improvements
 - Project Financials - GA
- Coming Soon
 - Multi-Currency Support
- Q&A



Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro

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customer success center

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Monthly Release Schedule

First
Friday

- Release Notes Published

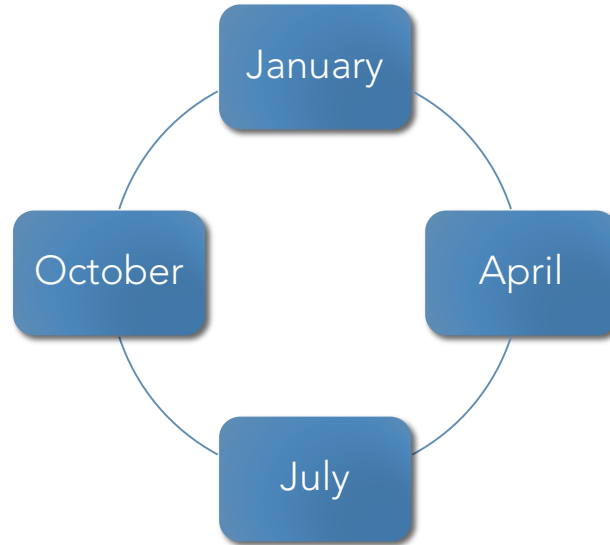
Second
Friday

- Release deployed to sandbox environments

Third
Friday

- Release deployed to production environments

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. Note that any issues you discover will be fixed as part of the normal development cycle.

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: Sandbox data cannot be refreshed between the second and third Fridays of the month



Planview Horizons User Conference

- More than 100 PPM Pro customers attended!
- Recordings of sessions coming soon
- Webinar describing how our development team uses LeanKit
 - November 28th



Planview Horizons User Conference 2019

- October 8-10, 2019
- Austin, TX
- Registration opens in December



New! FAQs, Tips and Timesavers

https://success.planview.com/Planview_PPM_Pro



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Getting Started



FAQs, Tips & Timesavers



PPM Pro Entities



Time and Expense Management

Current Month's Feature Status



Beta

Spreadsheet-Style Editor (rolling)
Requests Revamp Phase 1 (rolling)



GA

Project Financials
Enhanced T&E User Type

Spreadsheet-Style Task Editor

| Edit: Tablet Deployment Tasks | | | | | | | | | | | | | | |
|--|---------|------------------------------|----------|-------------------|--------------------|---------------|--------------|--------|------|-----------|--------------|------------------|------------|----------------|
| <div> <div>Save</div> <div>Save & Close</div> <div>Cancel</div> </div> <div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> </div> | | | | | | | | | | | | | | |
| Tablet Deployment Tasks | | | | | | | | | | | | | | |
| Info | Outl... | Title | Duration | Start Date | Target Date | Complete Date | Predecessors | Status | Type | % Comp... | Scheduled... | Task Hours To... | Actual ... | Milestone Date |
| | | All Tasks | 646 days | 9/1/2016 9:00 AM | 2/27/2019 5:00 PM | | | | | 100.00% | 0.00 | 0.00 | 1,286.00 | |
| 1 | 1 1 | Inception | 10 days | 9/1/2016 9:00 AM | 9/14/2016 5:00 PM | | | Open | | 100.00% | 0.00 | 0.00 | 60.00 | |
| 2 | 2 2 | Analysis | 125 days | 10/5/2016 9:00 AM | 3/31/2017 5:00 PM | | 1 | Open | | 100.00% | 0.00 | 0.00 | 420.00 | |
| 3 | 3 3 | Design | 34 days | 4/3/2017 9:00 AM | 5/19/2017 5:00 PM | | 2 | Open | | 100.00% | 0.00 | 0.00 | 526.00 | |
| 4 | 4 4 | Development | 95 days | 5/22/2017 9:00 AM | 9/29/2017 5:00 PM | | 3 | Open | | 100.00% | 0.00 | 0.00 | 280.00 | |
| 5 | 5 5 | Documentation and Validation | 25 days | 10/2/2017 9:00 AM | 11/3/2017 5:00 PM | | 4 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 6 | 6 6 | ▼ Training/Support | 342 days | 11/6/2017 9:00 AM | 2/26/2019 5:00 PM | | 5 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 7 | 7 6.1 | Task Name | 5 days | 11/6/2017 9:00 AM | 11/10/2017 5:00 PM | | | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 8 | 8 6.2 | Task 2 | 5 days | 11/1/2017 9:00 AM | 11/7/2017 5:00 PM | | | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 9 | 9 6.3 | Task 3 | 20 days | 11/6/2017 9:00 AM | 12/1/2017 5:00 PM | | | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 10 | 10 6.4 | Task 4 | 107 days | 12/4/2017 9:00 AM | 5/1/2018 5:00 PM | | 9 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 11 | 11 6.5 | Task 5 | 10 days | 5/2/2018 9:00 AM | 5/15/2018 5:00 PM | | 10 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 12 | 12 6.6 | Task 6 | 30 days | 5/16/2018 9:00 AM | 6/26/2018 5:00 PM | | 11 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 13 | 13 6.7 | Task 7 | 25 days | 6/27/2018 9:00 AM | 7/31/2018 5:00 PM | | 12 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 14 | 14 6.8 | Task 8 | 150 days | 8/1/2018 9:00 AM | 2/26/2019 5:00 PM | | 13 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 15 | 15 7 | Project Completion | 1 day | 2/27/2019 9:00 AM | 2/27/2019 5:00 PM | | 6 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |

Spreadsheet-Style Task Editor – Rolling Beta

Past Releases

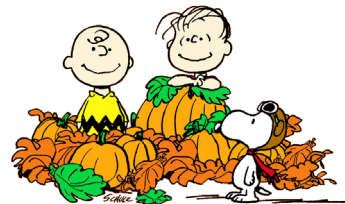
- Keyboard and editing interaction like a spreadsheet, including Undo/Redo
- Copy/paste to and from other spreadsheet tools, such as Excel and Google Sheets
- Handles up to 250 of a project's tasks
- Basic validation and correction handling

Current Release

- Can opt-in for production use
- Handles up to 500 of a project's tasks

Future Releases

- Ability to handle larger numbers of tasks
- Additional reconciliation support
- Concurrent editing



Spreadsheet-Style Task Editor

Toggle/editor available for users with Project > Edit > Tasks permission

The screenshot shows the 'Tasks' interface in Planview. At the top, there's a 'Filter Tasks' input field. Below it, a toolbar contains icons for adding, deleting, and moving tasks, as well as a 'Color by' dropdown set to 'None'. A red square highlights a grid icon in the toolbar, which is the toggle for the spreadsheet-style editor. A red arrow points from the text 'Click to enter spreadsheet-style editor' to this icon. Below the toolbar, a table header is visible with columns: Info, Duration, Title, Outline, jen's test, Category, Start Date, Complete D..., Target Date, and Sc.

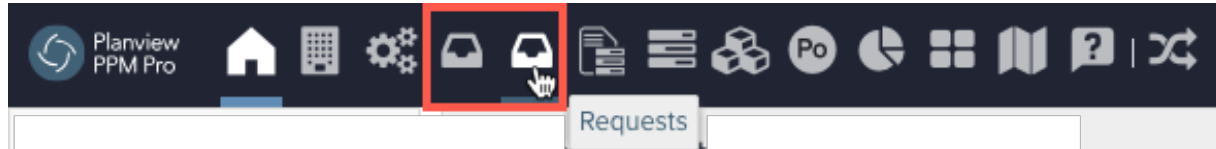
Click to enter
spreadsheet-style
editor

Spreadsheet-Style Task Editor

| Edit: Tablet Deployment Tasks | | | | | | | | | | | | | | |
|--|---------|------------------------------|----------|-------------------|--------------------|---------------|--------------|--------|------|-----------|--------------|------------------|------------|----------------|
| <div> <div>Save</div> <div>Save & Close</div> <div>Cancel</div> </div> <div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> </div> | | | | | | | | | | | | | | |
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| 1 | 1 1 | Inception | 10 days | 9/1/2016 9:00 AM | 9/14/2016 5:00 PM | | | Open | | 100.00% | 0.00 | 0.00 | 60.00 | |
| 2 | 2 2 | Analysis | 125 days | 10/5/2016 9:00 AM | 3/31/2017 5:00 PM | | 1 | Open | | 100.00% | 0.00 | 0.00 | 420.00 | |
| 3 | 3 3 | Design | 34 days | 4/3/2017 9:00 AM | 5/19/2017 5:00 PM | | 2 | Open | | 100.00% | 0.00 | 0.00 | 526.00 | |
| 4 | 4 4 | Development | 95 days | 5/22/2017 9:00 AM | 9/29/2017 5:00 PM | | 3 | Open | | 100.00% | 0.00 | 0.00 | 280.00 | |
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| 6 | 6 6 | ▼ Training/Support | 342 days | 11/6/2017 9:00 AM | 2/26/2019 5:00 PM | | 5 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 7 | 7 6.1 | Task Name | 5 days | 11/6/2017 9:00 AM | 11/10/2017 5:00 PM | | | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 8 | 8 6.2 | Task 2 | 5 days | 11/1/2017 9:00 AM | 11/7/2017 5:00 PM | | | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 9 | 9 6.3 | Task 3 | 20 days | 11/6/2017 9:00 AM | 12/1/2017 5:00 PM | | | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 10 | 10 6.4 | Task 4 | 107 days | 12/4/2017 9:00 AM | 5/1/2018 5:00 PM | | 9 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 11 | 11 6.5 | Task 5 | 10 days | 5/2/2018 9:00 AM | 5/15/2018 5:00 PM | | 10 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 12 | 12 6.6 | Task 6 | 30 days | 5/16/2018 9:00 AM | 6/26/2018 5:00 PM | | 11 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 13 | 13 6.7 | Task 7 | 25 days | 6/27/2018 9:00 AM | 7/31/2018 5:00 PM | | 12 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 14 | 14 6.8 | Task 8 | 150 days | 8/1/2018 9:00 AM | 2/26/2019 5:00 PM | | 13 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |
| 15 | 15 7 | Project Completion | 1 day | 2/27/2019 9:00 AM | 2/27/2019 5:00 PM | | 6 | Open | | 0.00% | 0.00 | 0.00 | 0.00 | |

Request Revamp - Review

- Existing requests renamed to “Legacy Requests”
- New Requests tab in top navigation upon opt-in
- Hover text “Requests”
- Can opt-in in production; already enabled in sandboxes



Request Revamp – Rolling Beta

Current Beta Functionality

- New Requests UI for composing requests
- Configure request types using Self-Service Administration
- New graphical, status-based card view
- Associate requests with new and existing projects, tasks, and issues
- New Request Status field
- Ability to copy notes and attachments to associated entities
- Request category-based permissions (in addition to All Requests permission)
- Basic Reporting
- **Reporting on associations**
- **API – currently works, but not revealed in UI**

Future Releases

- Scoring (targeted for November)
- Sequential Gates (targeted for January)
- Single Approver (targeted for January)
- Data Import
- API – reveal on Admin/Web Services section
- Advanced gate logic (early 2019)

Enhanced T&E User Functionality

- Time & Expense users can now view Tasks under Home > Tasks
 - Tasks you own – edit
 - Tasks you're scheduled to - view
- Time & Expense users can now view Project Logs under Home > Project Logs
 - Logs you're assigned to - edit
- New functionality shows up automatically

Enhanced T&E User Functionality – Tasks

The screenshot displays the Planview PPM Pro interface. On the left, a sidebar titled 'Sections' lists various modules: Timesheets, Expenses, Legacy Requests, Requests, Project Log, and Tasks. The 'Tasks' module is highlighted with a red rectangular box. The main area is titled 'My Tasks (3)' and contains a table with the following data:

| Info | Title | Project | Duration | Start Date | Target Date | Complete Date |
|------|--------|------------------------|----------|-------------------|--------------------|---------------|
| | SOW | EA Go Forward Strategy | 130 days | 10/1/2016 9:00 AM | 3/31/2017 5:00 PM | |
| | Task 1 | Sales CRM Changes | 175 days | 3/1/2018 9:00 AM | 10/31/2018 5:00 PM | |
| | Task 1 | FY CRM Web Updates | 77 days | 7/1/2017 9:00 AM | 10/17/2017 5:00 PM | |

On the right, a panel titled 'SOW' shows the details for the selected task. The 'Basic Details' section includes the following information:

- Title: SOW
- Milestone Date:
- Owner: Greer, Michelle
- IO/WBS:
- Task ID: 1666566523
- Outline: 1
- Number: 1
- Project: EA Go Forward Strategy
- Priority:
- Category: Task
- Is Capitalized?: ☐

Enhanced T&E User Functionality – Project Logs

The screenshot displays the Planview PPM Pro interface. On the left, a 'Sections' sidebar lists various project management tools: Timesheets, Expenses, Legacy Requests, Requests, Project Log (highlighted with a red box), and Tasks. The main area is titled 'My Project Log (1)' and contains a table with the following data:

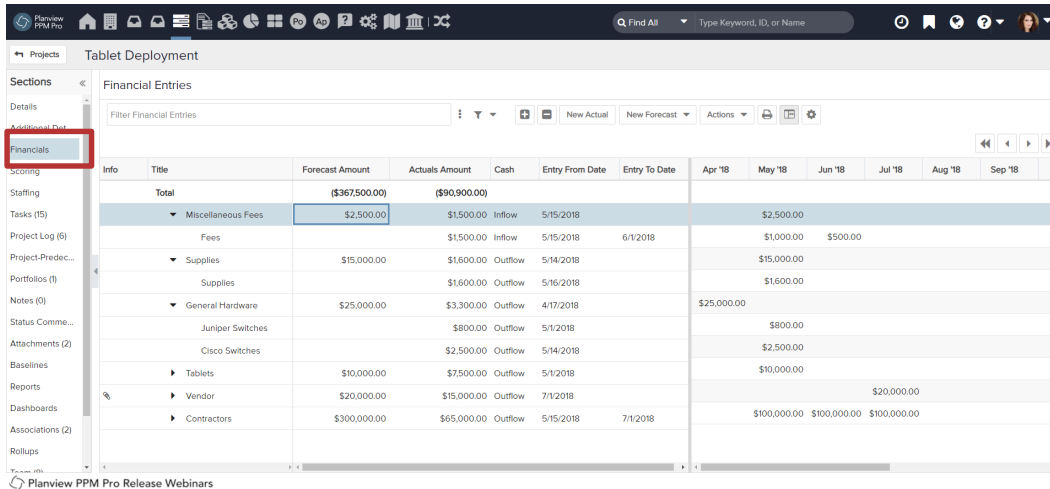
| ID | Title ↑ | Project | Assigned To | Status | Category |
|------------|---------------------------|----------------------------|-----------------|------------|------------|
| 1702468827 | Release Notes for October | FY Application Development | Greer, Michelle | Identified | Change ... |

Below the table, a detailed view for the selected entry is shown, titled 'Release Notes for October'. This view includes a 'Basic Details' section with the following information:

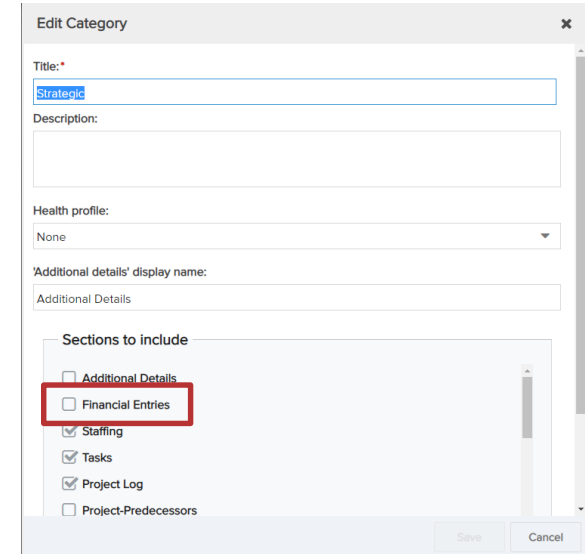
- ID: 1702468827
- Title: Release Notes for October
- Project: FY Application Development
- Assigned To: Greer, Michelle
- Status: Identified
- Category: Change Request
- Type: Resource
- Priority: (empty dropdown)
- Complexity: (empty dropdown)
- Budget Impact: (empty dropdown)
- Created By: Jones, Margaret

Project Financials

- General Availability (GA) in October
- Will be available in your production environment
- May need to surface on project categories



| Info | Title | Forecast Amount | Actuals Amount | Cash | Entry From Date | Entry To Date | Apr '18 | May '18 | Jun '18 | Jul '18 | Aug '18 | Sep '18 | Oct |
|------|----------------------|-----------------------|----------------------|---------|-----------------|---------------|---------|--------------|--------------|--------------|---------|---------|-----|
| | Total | (\$367,500.00) | (\$90,900.00) | | | | | | | | | | |
| | ▼ Miscellaneous Fees | \$2,500.00 | \$1,500.00 | Inflow | 5/15/2018 | | | \$2,500.00 | | | | | |
| | Fees | | \$1,500.00 | Inflow | 5/15/2018 | 6/1/2018 | | \$1,000.00 | \$500.00 | | | | |
| | ▼ Supplies | \$15,000.00 | \$1,600.00 | Outflow | 5/14/2018 | | | \$15,000.00 | | | | | |
| | Supplies | | \$1,600.00 | Outflow | 5/16/2018 | | | \$1,600.00 | | | | | |
| | ▼ General Hardware | \$25,000.00 | \$3,300.00 | Outflow | 4/17/2018 | | | \$25,000.00 | | | | | |
| | Juniper Switches | | \$800.00 | Outflow | 5/1/2018 | | | \$800.00 | | | | | |
| | Cisco Switches | | \$2,500.00 | Outflow | 5/14/2018 | | | \$2,500.00 | | | | | |
| | Tablets | \$10,000.00 | \$7,500.00 | Outflow | 5/1/2018 | | | \$10,000.00 | | | | | |
| | Vendor | \$20,000.00 | \$15,000.00 | Outflow | 7/1/2018 | | | | | \$20,000.00 | | | |
| | Contractors | \$300,000.00 | \$65,000.00 | Outflow | 5/15/2018 | 7/1/2018 | | \$100,000.00 | \$100,000.00 | \$100,000.00 | | | |



Edit Category

Title:

Description:

Health profile:

Additional details' display name:

Sections to include

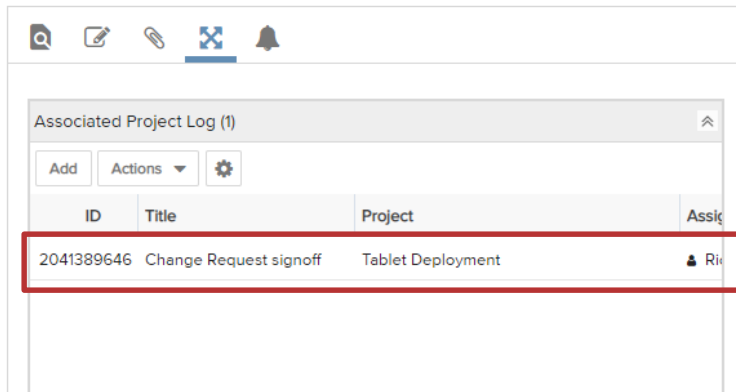
- ☐ Additional Details
- ☐ Financial Entries
- ☒ Staffing
- ☒ Tasks
- ☒ Project Log
- ☐ Project-Predecessors

Save Cancel

Enhancements This Month

- You can now report on associated entities. Associated entities are included in the Children folder of the "parent" entity.

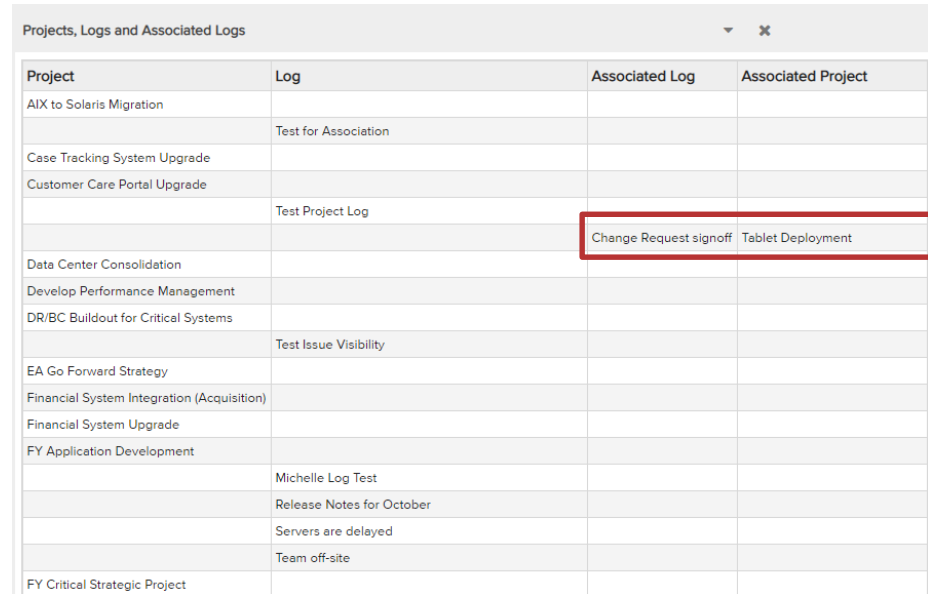
Test Project Log



Associated Project Log (1)

Add Actions Settings

| ID | Title | Project | Assigned |
|------------|------------------------|-------------------|----------|
| 2041389646 | Change Request signoff | Tablet Deployment | Ric |



| Project | Log | Associated Log | Associated Project |
|--|---------------------------|------------------------|--------------------|
| AIX to Solaris Migration | | | |
| | Test for Association | | |
| Case Tracking System Upgrade | | | |
| Customer Care Portal Upgrade | | | |
| | Test Project Log | | |
| | | Change Request signoff | Tablet Deployment |
| Data Center Consolidation | | | |
| Develop Performance Management | | | |
| DR/BC Buildout for Critical Systems | | | |
| | Test Issue Visibility | | |
| EA Go Forward Strategy | | | |
| Financial System Integration (Acquisition) | | | |
| Financial System Upgrade | | | |
| FY Application Development | | | |
| | Michelle Log Test | | |
| | Release Notes for October | | |
| | Servers are delayed | | |
| | Team off-site | | |
| FY Critical Strategic Project | | | |

Enhancements This Month

- Unit managers can be any user type or a non-terminated resource. Previously, Unit Managers were required to be full users. Note that if you assign a non-user to be a unit manager, any permission profile that used the Unit Manager rule would no longer apply.

| Hierarchy Units | | |
|--|---------------------|-----------|
| <div><div><div></div><div></div></div><div>Actions</div><div>Tools</div></div> | | |
| Title | Unit Manager | Resources |
| ▼ Planview | 👤 Kern, Kevin | 18 |
| Finance | 👤 Jackson, Debra | 2 |
| ▼ Information Technology | 👤 Ebert, Colin | 1 |
| ▶ Development | 👤 Laird, Peter | 4 |
| Operations | 👤 Entrekin, Caleb | 6 |
| Product Management | 👤 Davis, Nils | 4 |
| Marketing | 👤 Marymont, Lindsey | 2 |
| Product Development | 👤 Davis, Kristen | 2 |
| Project Management Office | 👤 Jones, Margaret | 8 |
| ▶ Sales | 👤 Kern, Kevin | 2 |

Enhancements This Month

- A "Description" field is now available for the Admin/Groups page. You can use this field to document the nature of any custom group.

The screenshot displays the Planview PPM Pro Admin/Groups page. The left sidebar shows the 'Groups' section selected. The main area shows a table of 15 groups. The 'Project Managers' group (Id: 1949920377) is highlighted. The table has columns: Id, Title, Ancestor Groups, Description, and Type. The 'Description' column is new and is highlighted with a red box. The details panel on the right shows the 'Project Managers' group details, including the 'Description' field, which is also highlighted with a red box.

| Id | Title | Ancestor Groups | Description | Type |
|------------|-------------------|---------------------|-------------|--------------|
| 12 | Enterprise | | | Standard |
| 22 | Expense Manager | | | Standard |
| 112 | Full Users | | | Standard |
| 46 | Internal Costs | | | Standard |
| 1 | Organization | | | Standard |
| 121 | PMO | | | Standard |
| 1949920377 | Project Managers | Resource | | Filter |
| 156 | Publishing | | | Standard |
| 11 | Resource | | | Standard |
| 1950657596 | Staffing Managers | | | User Defined |
| 20 | Timesheet Manager | | | Standard |
| 2041389658 | Training Team | Organization, Ti... | | User Defined |

Project Managers Details:

- Id: 1949920377
- Title: Project Managers
- Filter: Role = PM
- Ancestor Groups: Resource
- Description:

Enhancements This Month

- Descriptions for lookup list values are now displayed when you hover your cursor over the value. Enter the description text in the Description field on Admin > Setup > Lookup Lists.

List Values: Project Priority »

☐ Show Active Values Only New Move Up Move Down Actions

| ID | Default | Active | Title | Description | Color | Icon |
|------------|---------|--------|----------------|-----------------------|-------|------|
| 8827173 | | ✓ | 0: Immedi... | Immediate priority... | | |
| 8827174 | | ✓ | 1: High | | | |
| 8827175 | | ✓ | 2: Medium | | | |
| 8827176 | | ✓ | 3: Low | | | |
| 1706268... | | | 4: Really L... | | | |

Reporting and Compliance ⌵

Overall Health: Green

Project Classification: Strategic

Priority: 0: Immediate

Business Objective

Risk

Billing Code

Source Legacy Request*

Last Modified Date: 10/16/2018 4:37 PM

Dates

Start Date

Target Date

Completion Date

Progress

Status*

Phase

Actual Hours

0: Immediate

1: High

2: Medium

3: Low

Immediate priority, must be taken care of ASAP

Coming Soon

- Request Revamp Beta continues
- Spreadsheet-style Task Editor rollout continues
- Multi-Currency Support (target beta November)



Upcoming Webinars and Events

- November Release Webinar
 - November 14, 10:30am CDT
- Leveraging LeanKit with PPM Pro
 - November 28
 - Featuring Peter Laird, Director of Development for PPM Pro



Q&A

