



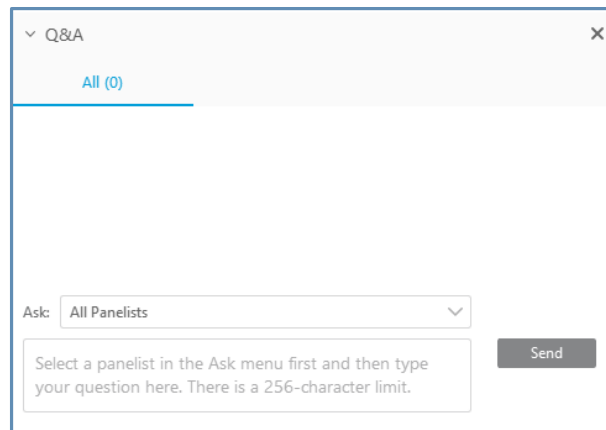
PPM Pro Customer Webinar: November 2018 Release

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



The screenshot shows a WebEx Q&A window. At the top, there is a header bar with a dropdown arrow and the text "Q&A", and a close button (X) on the right. Below the header, the text "All (0)" is displayed. The main area is a large, empty white space. At the bottom, there is a section labeled "Ask:" with a dropdown menu currently set to "All Panelists". Below the dropdown is a text input field with the 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 "Send" button.



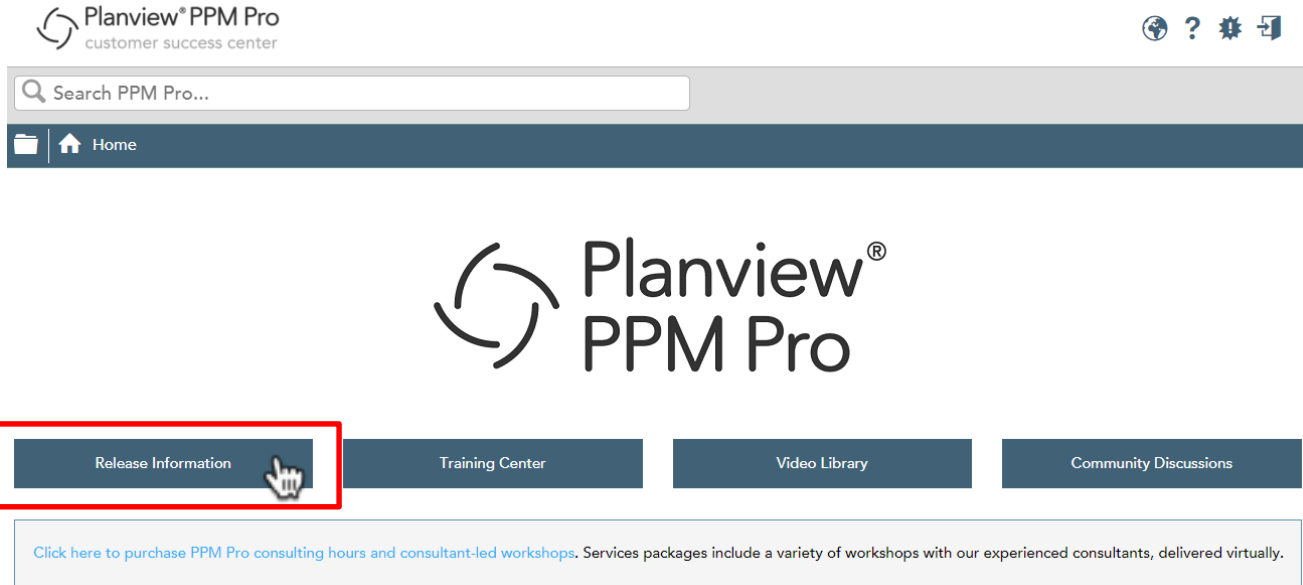
Today's Agenda

- Monthly Release Process and Sandboxes
 - December release schedule
- Rolling Beta features
 - Spreadsheet-Style Task Editor
 - Requests Revamp
- New Features and Enhancements
 - Transitioning to Project-Level Finances
- Coming Soon
- Q&A



Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro



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Monthly Release Schedule

First
Friday

- Release Notes Published

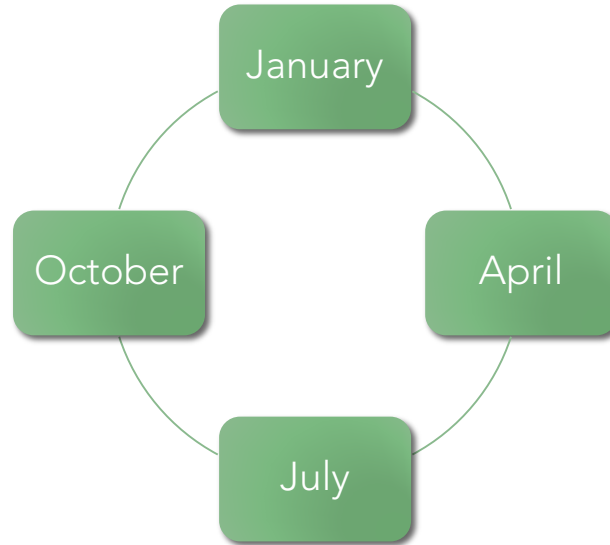
Second
Friday

- 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



December Release

- December release has been shifted one week earlier to accommodate holiday schedules
 - Friday, November 30 -- Release Notes published
 - Friday, December 7 -- Release deployed to sandboxes
 - Friday, December 14 -- Release deployed to production environments

Planview Horizons User Conference 2019

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



Current Month's Feature Status



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



Spreadsheet-Style Task Editor – Rolling Beta

Current Release

- 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
- Handles up to 500 of a project's tasks
- Reconciliation guidance
- Improved multi-user support

Future Releases

- Ability to handle larger numbers of tasks
- Multi-user awareness
- Session expiration handling



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 is a toolbar with various icons for task management, including a red box highlighting the spreadsheet-style editor icon (a grid). To the right of the toolbar, there are buttons for 'New', 'Gantt', 'Actions', and a settings gear. Below the toolbar is a table with columns: Info, Duration, Title, Outline, jen's test, Category, Start Date, Complete D..., Target Date, and Sc. The 'jen's test' cell is highlighted in blue.

Info	Duration	Title	Outline	jen's test	Category	Start Date	Complete D...	Target Date	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>														
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	

New in November: Reconciliation Support

Edit: Tablet Deployment Tasks

Save Save & Close Cancel

Tablet Deployment Tasks

	Info	Outl...	Title	Is Capitalized?	Predecessors	Status	Start Date	Target Date
			All Tasks				9/1/2016 9:00 AM	2/27/2019 5:00 PM
1	1	1	Inception	✓		Open	9/1/2016 9:00 AM	9/14/2016 5:00 PM
2	2	2	Analysis		1	Open	10/5/2016 9:00 AM	3/31/2017 5:00 PM
3	3	3	Design		4	Open	4/3/2017 9:00 AM	5/19/2017 5:00 PM
4	4	4	Development		3	Open	5/22/2017 9:00 AM	9/29/2017 5:00 PM
5	5	5	Documentation and Validation		4	Open	10/2/2017 9:00 AM	11/3/2017 5:00 PM
6	6	6	▼ Training/Support		5	Open	11/6/2017 9:00 AM	2/26/2019 5:00 PM

- Click Reconcile to accept change(s) and save
- Click Cancel to return to editor and make manual changes, or discard

Validation and Reconciliation

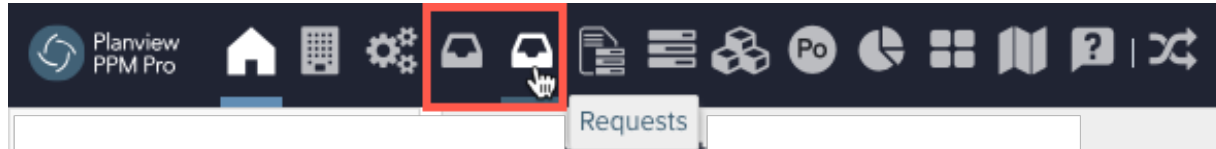
One or more Tasks have validation issues and cannot be saved. Click 'Reconcile' to continue to save and accept the reconciliation described below. If you do not agree with the reconciliation, click 'Cancel' to return to editing and make necessary adjustments.

Se...	ID	Title	Message
!	1702468959	Task [4] 'Design' is part of a cyclical dependency	Removed Dependency causing cycle 'Development -> Design' on task [4] 'Design'

Reconcile Cancel

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
- **Scoring**
- **Show on New**

Future Releases

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

Request Revamp – Scoring

Critical Request ✕

 Details  Notes (1)  Attachments (0)  Associations  **Scoring**

Scoring Info: Critical Request Menu

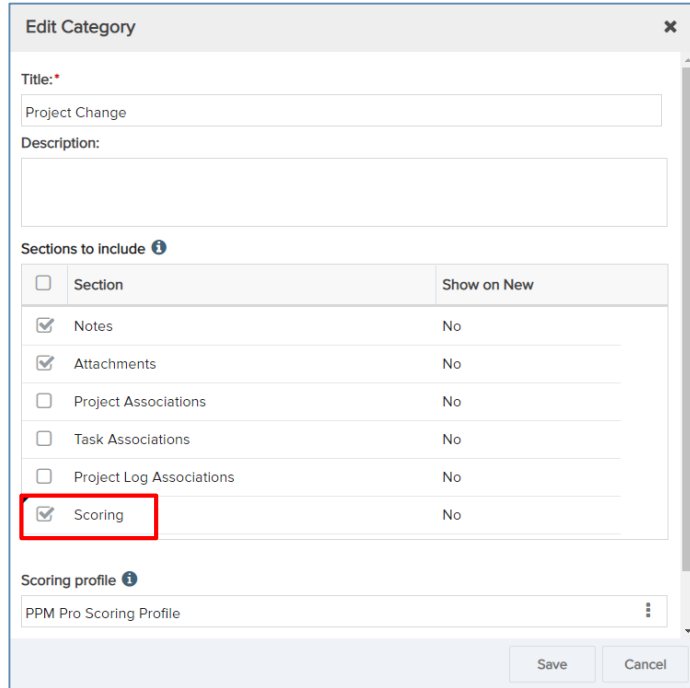
Scoring Profile	Innotas Scoring Profile	Scoring Is Locked	No
Score	91.00	Scoring Locked As Of	
		Scored As Of	11/13/2018 3:10 PM CST

Scores: Critical Request View By User ▾ Menu

Team Member	Score	Category	Weighted Category Score	Criteria	Criteria Selection	Weighted Criteria Score	Function
Jones, Margaret	91.00	Compliance	10.00	Technical Risk	10.0 - Technology Mature; deep skills available	10.00	[Edit] [Delete]
		Value	51.00	Payback Period	7.0 - 1-2 Years	21.00	
				Strategic Alignment	10.0 - Aligns with multiple Business Objectives	30.00	
		Risk	30.00	Complexity	5.0 - Impacts single system or process	10.00	
				Technical Risk	10.0 - Technology Mature; deep skills available	20.00	

This list contains 1 item(s).

Request Revamp – Scoring



Edit Category

Title: *
Project Change

Description:

Sections to include ⓘ

<input type="checkbox"/>	Section	Show on New
<input checked="" type="checkbox"/>	Notes	No
<input checked="" type="checkbox"/>	Attachments	No
<input type="checkbox"/>	Project Associations	No
<input type="checkbox"/>	Task Associations	No
<input type="checkbox"/>	Project Log Associations	No
<input checked="" type="checkbox"/>	Scoring	No

Scoring profile ⓘ
PPM Pro Scoring Profile

Save Cancel

- Add Scoring to any request category
- Managed under Admin > Setup > All Entities > Requests > Categories

Request Revamp – Scoring

- The ability to score will now be managed by permission profiles
- Scoring Team and Scoring Filters become obsolete for new request categories

Permission Hierarchy

- ▶ ☐ Organization Internal Rates
- ▶ ☐ All Portfolio Classes
- ▶ ☐ All Project Categories
- ▶ ☐ Report
- ▼ ☐ All Request Categories
 - ▶ ☐ View
 - ☐ Create
 - ▼ ☐ Edit
 - ☐ Details
 - ☐ Notes
 - ☐ Attachments
 - ☒ Scoring
 - ☐ Lock Scoring
- ▶ ☐ Delete
- ▶ ☐ Project Change request category
- ▶ ☐ Project Initiation request category
- ▶ ☐ Resource

Request Revamp – Show on New

New Project Initiation

Details | Notes (0) | Attachments (0) | Scoring

Save | Cancel | Actions

Basic Details

Title*

Requester* Jones, Margaret

Status

Scoping Estimates

Desired Start Date

Desired Completion Date

Project Information

Business Sponsor

Division

Brief Description of Proposed Solution

Other tabs will become available once Details are saved.

Show on New

Details | Notes (0) | Attachments (0) | Scoring

Save | Cancel | Copy URL | Actions

Basic Details

ID 2042569359

Title* Show on New

Requester* Jones, Margaret

Status

Scoping Estimates

Desired Start Date

Desired Completion Date

Project Information

Business Sponsor

Division

Brief Description of Proposed Solution

Close

Request Revamp – Show on New

Edit Category

Title: *
Project Change

Description:

Sections to include ⓘ

<input type="checkbox"/>	Section	Show on New
<input checked="" type="checkbox"/>	Notes	No
<input checked="" type="checkbox"/>	Attachments	No
<input type="checkbox"/>	Project Associations	No
<input type="checkbox"/>	Task Associations	No
<input type="checkbox"/>	Project Log Associations	No
<input checked="" type="checkbox"/>	Scoring	No

Scoring profile ⓘ
PPM Pro Scoring Profile

Save Cancel

- Add Scoring to any request category
- Managed under Admin > Setup > All Entities > Requests > Categories

Enhancements This Month

- The HTC timesheet setting “Allow users to view or edit hours to complete (HTC)” has been split into 2 settings:
 - Automatically adjust Task hours to complete (HTC) based on timesheet actuals
 - Allow users to view and edit HTC on timesheet entries

Timesheet Entry Options

Track time for (1 required): ☒ Projects ☒ Admin ☐ Portfolios

☒ Allow users to edit 'Total' hours ⓘ

☒ Automatically adjust Task hours to complete (HTC) based on timesheet actuals ⓘ

☒ Allow users to view and edit HTC on timesheet entries

☒ Show if task 'Is Capitalized'

☐ Allow users to indicate if:

☐ Allow users to select [Edit Work Location Options](#)

☐ Allow users to select [Edit Company Options](#)

☐ Show weekend days on timesheets by default

Enhancements This Month

- New computed field for reporting on finances called Total Child Actual Amount. This field provides the sum of all actuals for a forecast.

All Financial Planning by Financial Entries Time ...			
	11/1/2018		
	Forecast Amount	Total Child Actuals Amount	Actuals Amount
Global Transparency	\$31,500.00	(\$10,950.00)	\$20,950.00
Income	\$12,000.00	\$5,000.00	
Income Actual			\$5,000.00
Licenses	\$14,500.00	(\$15,950.00)	
Licenses - Actual 1			\$14,800.00
Licenses - Actual 2			\$1,150.00
Servers	\$5,000.00		


Enhancements This Month

Configurable
columns for
Associations grids

Initiation

Details Notes (0) Associations (3)

Associated Issues/Risks (3)

Add Actions 

Title	Project	ID	Assigned To	Status
Curve is too sharp f...	Hyperspace Byp...	160403...	True, Frank	Identified
Low usage/satisfac...	Hyperspace Byp...	863254...	True, Frank	Verified
cockpit not comfort...	Hyperspac			

Configure Settings for Issues/Risks

Select up to 20 fields to display as columns and place them in the order they should appear (the top most field is the left most column).

Available Fields

- Close Date
- Last Modified Date
- Priority
- Start Date
- Target Date

Restore Defaults

Fields displayed as columns (6 shown, max 20)

Move Up Move Down

- Title
- Project
- ID
- Assigned To
- Status
- Type

Save Cancel

Enhancements This Month

- Two new Timesheet Entry report sources:
 - All Timesheet Entries, With Approval State, Summarized by Month
 - All Timesheet Entries, With Approval State, Summarized by Timesheet Period

Transition: Project-Level Financial Entries

- Transitioning from Task to Project Level
 - Option 1: Move all Task-level costs to Project-level
 - Option 2: Use Project-level finances for go-forward costs, leave Task-level for historical costs
- If you have never used Task-level financials, please submit a Customer Care ticket to have them disabled

Transition: Project-Level Financial Entries

- Option 1: Move all Task-level costs to Project-level
 - Run a report using the “All Material Estimates” source to gather estimated costs
 - Run a report using the “All Expense Entries” source to gather actual costs
 - Use the Data Import functionality to import estimates (now forecasts) and actuals against projects
 - Ask the Customer Care team to disable Task-level financials once moved
 - Use Project-level financials going forward

Transition: Project-Level Financial Entries

- Option 2: Use Project-level finances for go-forward costs, leave Task-level for historical costs
 - Start new work using project-level expenses
 - Keep existing task-level expenses as they are
 - PPM Pro will disable ability to create new expenses at the task level mid-2019
 - Customers can continue to report on historical task-level data for 2 years
 - Don't duplicate task expenses at the project level; PPM Pro rolls up and reports on both

Coming Soon

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



Upcoming Webinars and Events

- No Release Webinar for December 2018
- Leveraging LeanKit with PPM Pro
 - Q1 2019 – date TBD



Q&A

