



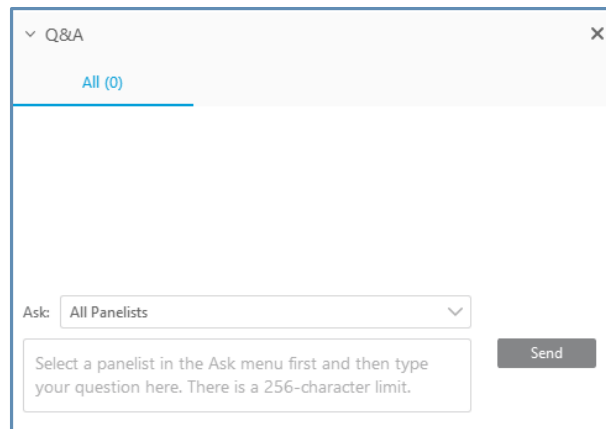
PPM Pro Customer Webinar: January 2019 Release

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 WebEx Q&A 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
- Release topics
 - Generally Available features
 - Rolling Beta features
 - New Features and Enhancements
- Coming Soon
- 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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[Click here to purchase PPM Pro consulting hours and consultant-led workshops.](#) Services packages include a variety of workshops with our experienced consultants, delivered virtually.

Monthly Release Schedule

First
Friday

- Release Notes Published

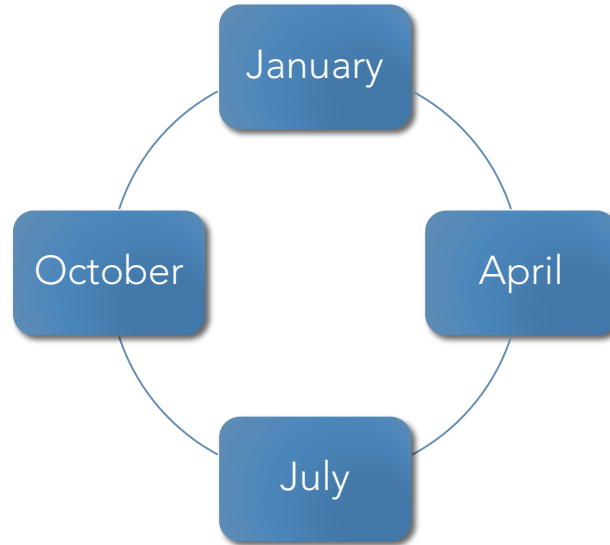
Second
Friday

- 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

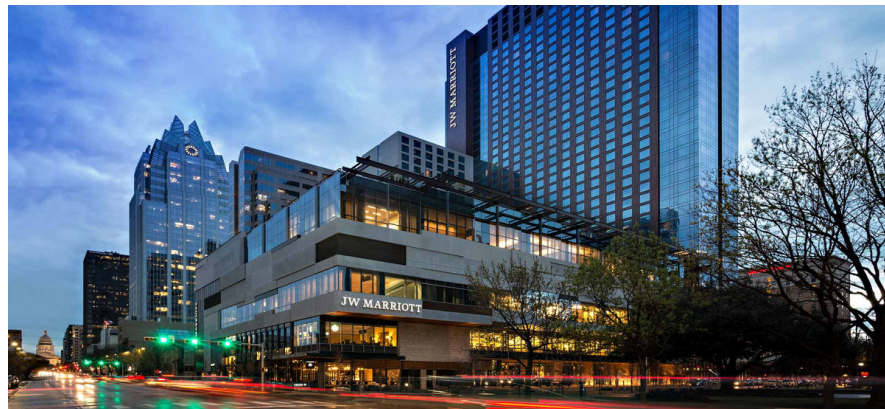
- A sandbox is a snapshot of your production environment
- Beta functionality is enabled in sandboxes by default
- Don't have one? Contact your Account Manager (additional fee)

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



Planview Horizons User Conference 2019

- October 8-10, 2019
- Austin, TX
- Registration open! <https://horizons.planview.com>
- Call for Presentations now open



Current Month's Feature Status



Requests Revamp (rolling)



Spreadsheet-Style Editor

Spreadsheet-Style Task Editor – Now GA

- Improved multi-user support with user icons
- Handles up to 1000 tasks
- Keyboard and editing interaction like a spreadsheet, including Undo/Redo
- Copy/paste to and from other spreadsheet tools, such as Excel and Google Sheets
- Basic validation and correction handling
- Reconciliation guidance

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

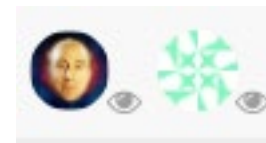
Spreadsheet-Style Task Editor

Edit: Hyperspace Bypass Tasks

Save Save & Close Cancel

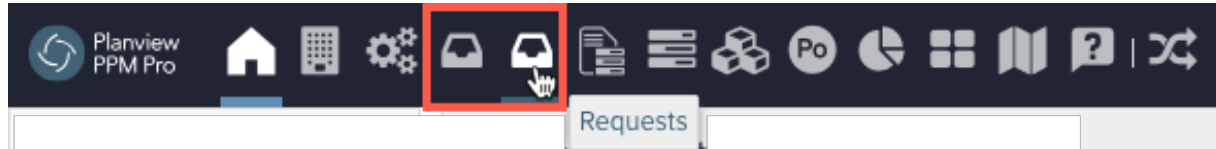
Lovelace, Ada is viewing or editing this project

	Info	#	Title	Duration	Outline	Predecess...	Category	Start Date	Complete D...	Target Date	Status	Owner
			All Tasks	3562 da...				5/2/2016 9:00 AM		12/31/2029 5:00 PM		Adams, Alex
1		1	▼ Initiation	3562 da...	1		Task	5/2/2016 9:00 AM		12/31/2029 5:00 PM	Proposed	
2		2	Go Some Sp...	3273 days	1.1		Task	5/2/2016 9:00 AM		11/21/2028 5:00 PM	Proposed	Lovelace, Ada
3		3	Task 22-upd...	3562 da...	1.2		Milestone	5/2/2016 9:00 AM		12/31/2029 5:00 PM	Proposed	N/A
4		4	Obtain Mana...	319 days	1.3	2	Task	10/10/2016 9:00 AM	4/3/2020 5:...	12/29/2017 5:00 PM	In Progr...	
5		5	Sportsball!	1151 days	1.4		Task	5/2/2016 9:00 AM	4/9/2018 5:...	10/2/2020 5:00 PM	Proposed	
6		6	Staff sub-tea...	3562 da...	1.5		Phase	5/2/2016 9:00 AM	9/1/2016 5:0...	12/31/2029 5:00 PM	Proposed	N/A
7		7	Fine-tune Re...	552 days	1.6		Task	10/10/2016 9:00 AM	4/18/2018 5:...	11/21/2018 5:00 PM	Approve...	
8		8	initiate Now!	145 days	1.7		Task	5/2/2016 9:00 AM	4/30/2018 5:...	11/23/2016 5:00 PM	Proposed	
9		9	▼ Planning	5 days	2		Task	9/26/2016 9:00 AM	3/26/2018 5:...	9/30/2016 5:00 PM	Proposed	
10		10	Order Hardw...	5 days	2.1		Task	9/26/2016 9:00 AM	3/26/2018 5:...	9/30/2016 5:00 PM	In Progr...	
11		11	Order Softw...	1 day	2.2		Task	9/26/2016 9:00 AM	3/26/2018 5:...	9/26/2016 5:00 PM	In Progr...	
12		12	Install Hardware	792 days	3		Task	11/1/2016 9:00 AM	4/24/2018 5:...	11/14/2019 5:00 PM	Proposed	
13		13	Fine Tune Hardw...	5 days	4		Marketin...	5/2/2016 9:00 AM	4/19/2018 5:...	5/6/2016 5:00 PM	Proposed	N/A
14		14	▼ Executing	85 days	5		Task	11/14/2016 9:00 AM	5/7/2018 5:...	3/13/2017 5:00 PM	Proposed	



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
- **Gates**
- **Notifications**
- **Single Approvers**

Future Releases

- Multiple Approvers
- Advanced gate logic
- Data Import
- API – reveal on Admin/Web Services section

Request Revamp – Gate Setup

Create New Category

Title:*

Description:

Sections to include ⓘ

<input type="checkbox"/>	Section	Show on New
<input checked="" type="checkbox"/>	Notes	No
<input checked="" type="checkbox"/>	Attachments	No

Scoring prompt ⓘ

Additional Options If Using Gates

☐ Show Request guidelines ⓘ

☐ Send notification to requester upon submission ⓘ

☐ Allow request to be sent back to any gate

☒ This category is active and available for use ⓘ

Copy entity details from category:

None (do not copy, only include default fields)

SaveCancel

Request Revamp – Gate Setup

Request Categories (4)

New ▾

Actions ▾

Active	Title	Notes	Attachments	Project As.
✓	Abstract Business Case	✓	✓	▾
✓	Innovation Idea	✓	✓	✓
✓	Minor Project Request	✓	✓	✓
✓	Request	✓	✓	✓

Gates: Request

New

Edit

Edit Sequential Gate Flow

Delete

Title	Description	Notifications
Initial Review	On gate entry. Reminder weekly on Mo	
Financial Team Review		

New Gate

General*

Gate Approver*

Notifications

Title:*

Description:

Sections to be shown at this Gate ⓘ :

☐ Notes

☐ Attachments

☐ Project Associations

☐ Scoring

Please enter values for required fields.

Save

Save & Add Gate

Cancel

Request Revamp – Gate Approver

New Gate

General*

Gate Approver*

Notifications

Approver*

Adams, Alex

Please enter values for required fields.

Save

Save & Add Gate

Cancel

Request Revamp – Notifications

New Gate

General*

Gate Approver*

Notifications

☐ Upon entering this gate, send email notification to all relevant gate approvers ⓘ

☒ Send reminder email to approvers who have not yet approved ⓘ

6

:

00

AM

PST

Daily

Every 1 days

Email subject and message*

Request review and approval reminder

{x}

{x} Insert Proximanova-regular B I U T* T* ⋮

The request listed below still needs your review and approval.

Notification sent to users only. A link to the request will appear below the email message

Please enter values for required fields.

Save

Save & Add Gate

Cancel

Request Revamp – Card View with Gates

The screenshot displays the Planview PPM Pro interface. The top navigation bar includes the Planview PPM Pro logo, a home icon, a calendar icon, a document icon, a list icon, a pie chart icon, a window icon, a 'Po' icon, an 'Ap' icon, a help icon, a settings icon, and a map icon. A search bar labeled 'Find All' and a 'Type Keyword...' field are also present. Below the navigation bar, the 'All Requests' section is visible. It features a 'Project Initiation' dropdown, a 'Filter Request' input field, and buttons for 'New', 'Actions', 'Print', and 'Settings'. The 'Group By' dropdown is set to 'Current Gate', and the 'Show' dropdown is set to '(None), Business Review, Financial Review'. The main content area is divided into three columns representing different gates:

- (None)**:
 - 1975952104
New Product Launch
Richards, Steve
8/1/2018
In Progress
 - 2038970918
New Request to Create Project
Jones, Margaret
In Progress
 - 2040805606
New Test
Jones, Margaret
9/20/2018
 - 1975952187
Outlook Upgrade
Jones, Margaret
6/22/2018
 - 1975952098
- Business Review**:
 - 2044179436
Customer Treats
Jones, Margaret
Business Review
 - 2044178908
Test
Jones, Margaret
Business Review
- Financial Review**:
 - 1975952189
Critical Request
Jones, Margaret
6/20/2018
In Progress
Financial Review

Planview PPM Pro Release Webinars

Request Revamp – Gate Actions

The screenshot displays the Planview PPM Pro interface. On the left, a sidebar lists various requests, including 'New Product', 'New Request', and 'Outlook Upgrade'. The main area shows a 'Test' request form. The form has tabs for 'Details', 'Notes (0)', 'Attachments (0)', 'Associations', and 'Scoring'. Below the tabs are buttons for 'Save', 'Cancel', 'Copy URL', and 'Actions'. The form is divided into two main sections: 'Basic Details' and 'Project Information'. The 'Basic Details' section includes fields for 'ID' (2044178908), 'Title' (Test), 'Requester' (Jones, Margaret), and 'Status'. The 'Project Information' section includes fields for 'Current Gate' (Business Review), 'Business Sponsor', 'Business Value' (2: Medium), 'Division' (Corporate), and 'Brief Description of Proposed Solution'. At the bottom right of the form, there is a red-bordered box containing three buttons: 'Approve', 'Other Actions', and 'Close'. The 'Other Actions' button is highlighted, and a dropdown menu is visible below it, showing three options: 'Send Back to Prior Gate', 'Reject', and 'Place On Hold'.

Planview PPM Pro

Find All

Type Keyword, ID, or Na...

All Requests

Group By: Current

(None)

1975952104
New Product
Richards, St
8/1/2018
In Progress

2038970918
New Request
Jones, Marg
In Progress

2040805606
New Test
Jones, Marg
9/20/2018

1975952187
Outlook Upgr
Jones, Marg
6/22/2018

1975952098

Planview PPM Pro Release Webinars

Test

Details Notes (0) Attachments (0) Associations Scoring

Save Cancel Copy URL Actions

Basic Details

ID 2044178908

Title * Test

Requester * Jones, Margaret

Status

Project Information

Current Gate Business Review

Business Sponsor

Business Value 2: Medium

Division † Corporate

Brief Description of Proposed Solution

Scoping Estimates

Desired Start Date

Approve Other Actions Close

Send Back to Prior Gate

Reject

Place On Hold

Request Revamp – Field Save

- Ability to save a request before submitting

The screenshot displays the 'New Test' form interface. At the top, there are tabs for 'Details', 'Notes (0)', 'Attachments (0)', and 'Scoring'. Below the tabs are buttons for 'Save', 'Cancel', 'Copy URL', and 'Actions'. The form is divided into three main sections: 'Basic Details', 'Project Information', and 'Scoping Estimates'. The 'Basic Details' section includes fields for 'ID' (2040805606), 'Title' (New Test), 'Requester' (Jones, Margaret), and 'Status'. The 'Project Information' section includes 'Current Gate', 'Business Sponsor', 'Division' (highlighted with a red box), and 'Brief Description of Proposed Solution'. The 'Scoping Estimates' section includes 'Desired Start Date' (9/20/2018) and 'Desired Completion Date' (9/27/2018). At the bottom right, there are 'Submit' and 'Close' buttons.

New! Getting the Most out of PPM Pro

- New area on the Success Center with new content:
 - FAQs - Original content
 - Tips & Timesavers - NEW! This is content based on the presentation we gave at Horizons 2018
 - Strategies - NEW! This section offers approaches to using PPM Pro broadly throughout your organization.



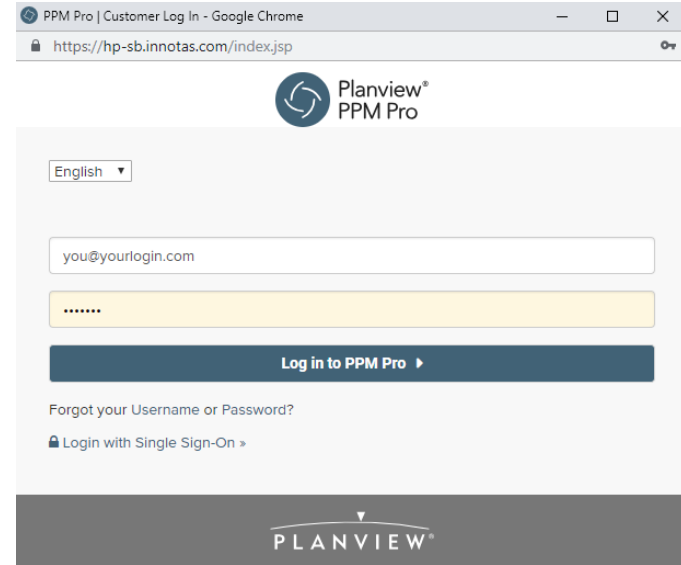
Getting the Most out of PPM Pro

Enhancements This Month

- Ability to disable the New buttons for:
 - Task-level expenses
 - Legacy requests
- If you are preparing to transition off of either of these features and onto their replacements, please take a look at these helpful articles in the CSC:
 - <https://success.planview.com/Planview PPM Pro/030 Innotas Entities/095 Requests/003 Transitioning from Legacy to New Requests>
 - <https://success.planview.com/Planview PPM Pro/Project Financial Entries/010 Transitioning from Task to Project Level Expenses>

Enhancements This Month

- When a session times out, you will be prompted to enter your login credentials in a new modal
- You will be returned to where you were when your session timed out, and in most cases any work in progress will be preserved



Enhancements This Month

- When creating a project from a template, the PMO Locked and Confidential Project settings are now included in the copy.

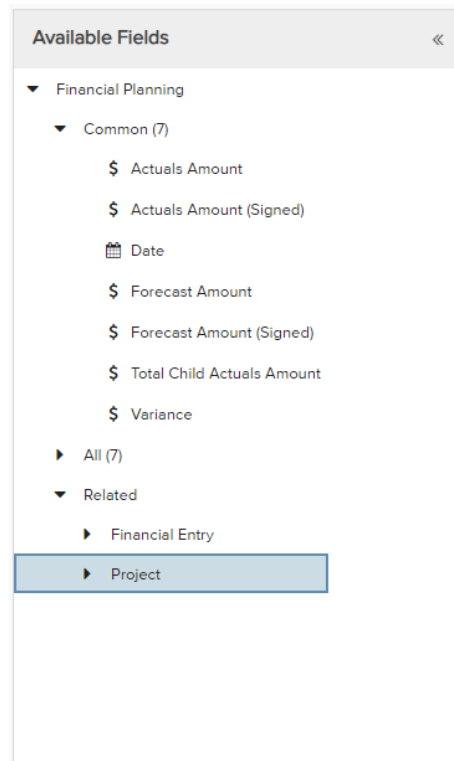
The screenshot shows a web form titled "New Project Step 2 of 2: Complete Project Details". The form is divided into several sections: Basic Details, Alignment, General Settings, Progress, Other Details, and Scoring. The "General Settings" section is highlighted with a red rectangular box. Within this section, the "PMO Locked" checkbox is checked, and the "Confidential Project" dropdown menu is set to "Yes". Other fields in the "General Settings" section include "Health Profile" (None), "Allocation Units" (Headcount), "Resource Planning Mode" (Project), "Alternate PM Timesheet Approver" (empty), and "Can Be Template" (No). The "Progress" section includes "Status" (Proposed), "Start Date" (7/4/2018), "Target Date" (empty), and "Completion Date" (empty). The "Other Details" section includes "Description" (Small unexpected treats for customers, everyone likes good surprises!) and "Objective" (empty). The "Scoring" section includes "Scoring Profile" (empty). At the bottom of the form, there is a message "Please enter values for required fields." and three buttons: "Previous", "Save", and "Cancel".

Enhancements This Month

- Two new resource planning report sources:
 - Resource Planning by Role Estimates
 - Resource Planning for Role Estimates for a Selected Project
- Report on the task role estimated hours/cost (not the resource schedules scheduled hours/cost, which are handled by the Resource Planning by Resource Schedules report sources)
- Note that Resource Planning by Resource Schedules report sources now allow you to report on role estimates (as a related entity)

Enhancements This Month

- The "Project" field has been added to the Common folder for Financial Entry and Financial Planning reports.



Enhancements This Month

- The user type formerly known as "T&E User" has been renamed to "Time User". Time users can log time and view tasks and project logs that they own, as well as tasks they are scheduled to.

Coming Soon

- Request Revamp Beta continues
- Multi-Currency Support (target beta February)
- OEM reporting tool has been selected



Upcoming Webinars and Events

- February Release Webinar
 - February 13th, 10am CT
- PPM Pro Roadmap Review
 - February 19th, 10am CT
- Leveraging LeanKit with PPM Pro
 - March 27th, 10am CT



Q&A

