PPM Pro Customer Webinar: February 2019 Release

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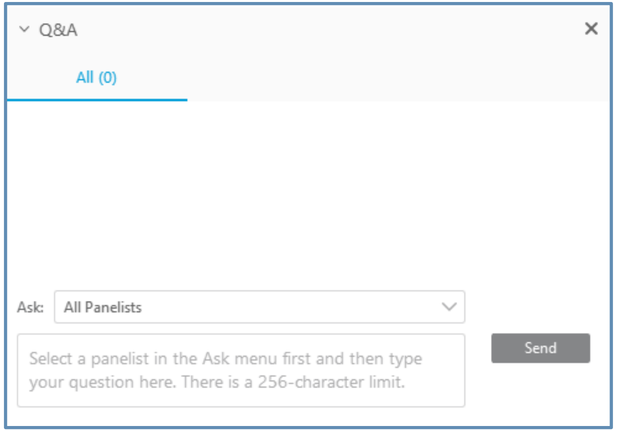
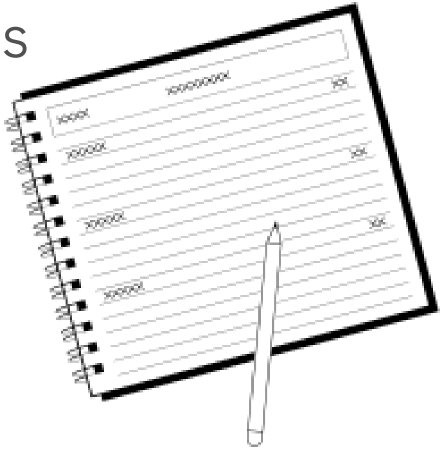
Housekeeping Items

- 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



Today’s Agenda

- Monthly Release Process and Sandboxes
- Planview Horizons Recap
- Generally Available features
- Rolling Beta features
- New Features and Enhancements
- Coming Soon
- Q&A



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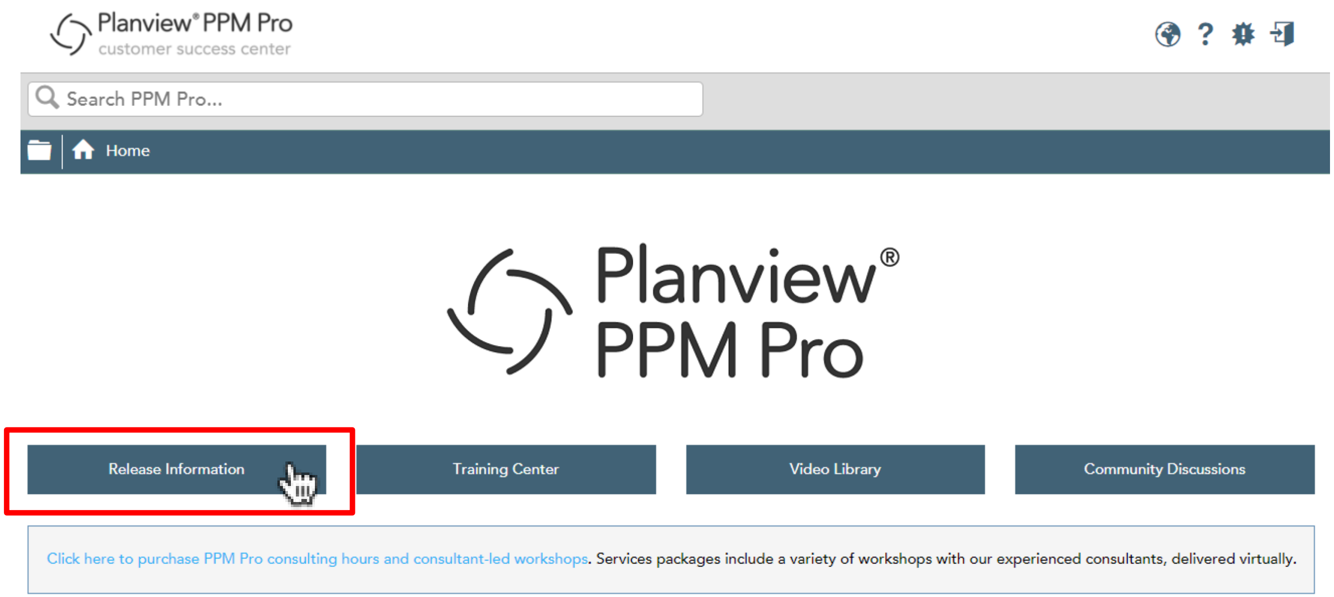
Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro



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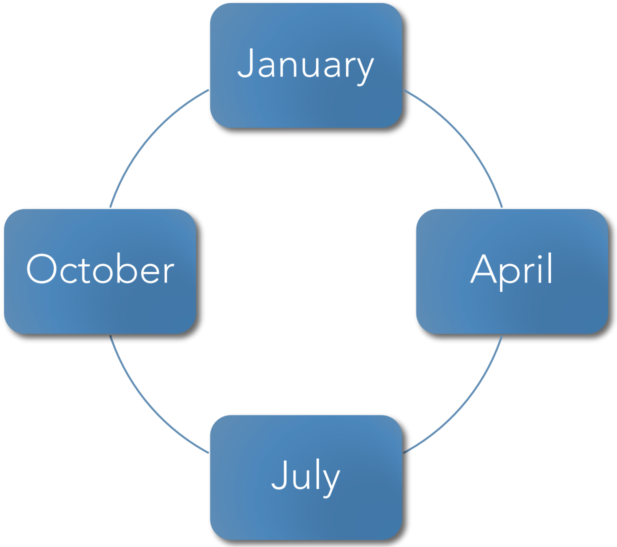
Monthly Release Schedule

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.

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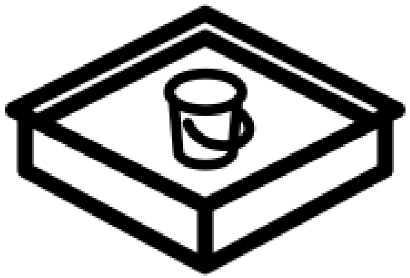
Get early access to features in your sandbox

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

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Current Month's Feature Status

Beta

Requests Revamp (rolling)
Support for multiple currencies

GA

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Multi-Currency – Beta

Initial Beta Functionality

- Create currency tables to add currencies to your environment
- Enter and adjust exchange rates with effective dating
- Configure projects to use different currency than the Organization currency
- Configure internal rates for roles/resources that are different than the Organization currency

Future Releases

- Rollups
- Reporting
- Data Import – update existing entities accommodate currencies
- API – update existing entities to accommodate currencies
- API – support integration with external exchange rate provider

Multi-Currency – Beta

- Every organization has an organization-wide currency, sometimes referred to as the default (Admin/Organization/Info)

- Configured by Planview Customer Care or your engagement manager
- Make sure it is correct before adding currencies
- All exchange rates calculated against the Organization currency

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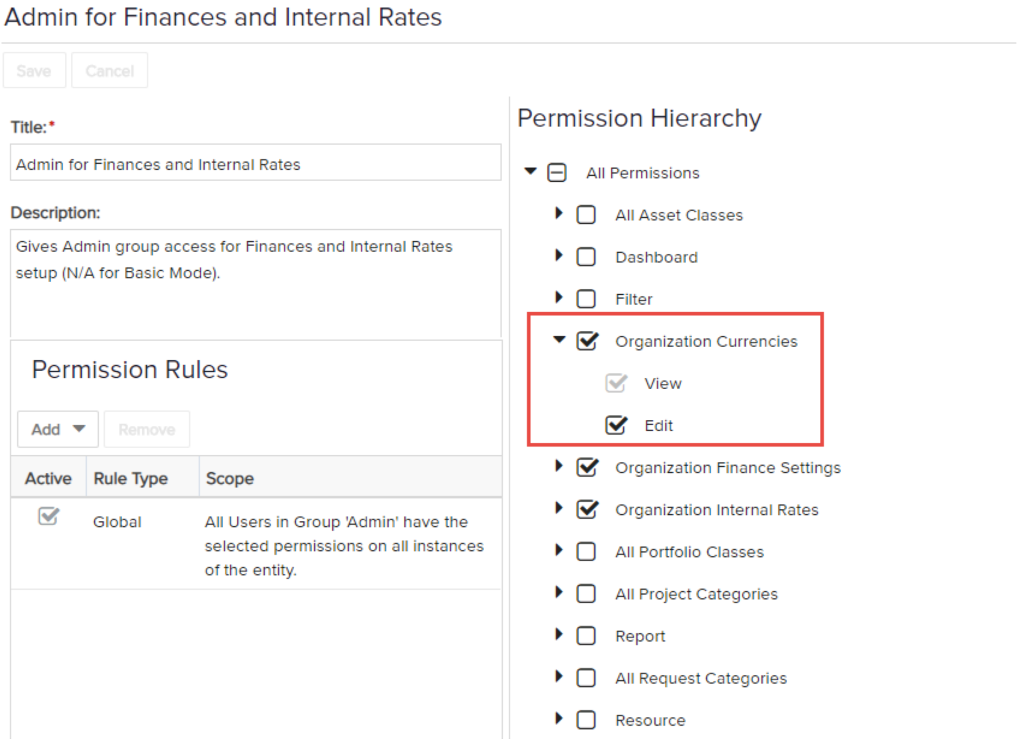
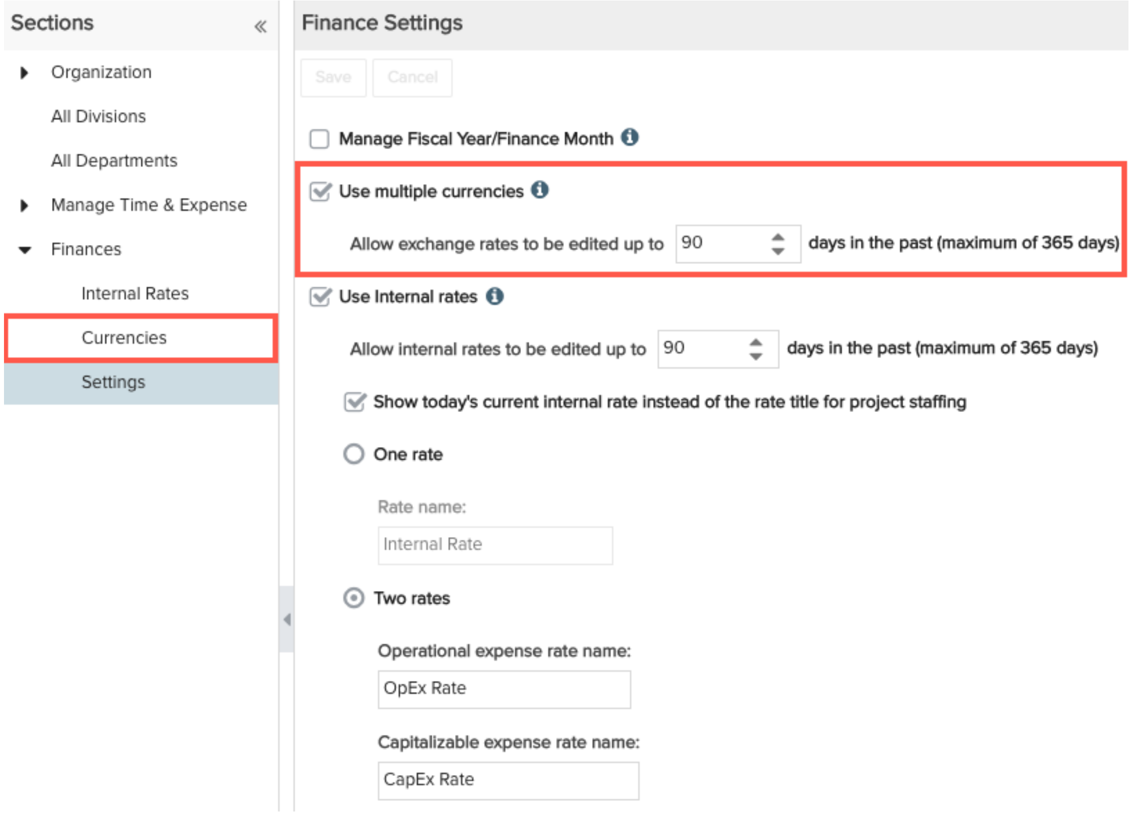
Multi-Currency – Beta



Multi-Currency – Beta



Multi-Currency – Beta

- Create currency tables

Currencies

Add other currencies that projects, requests, and resource and role rates may use instead of the Organization currency. The exchange rates for these currencies should be relative to 1 unit of the Organization currency: US Dollars (USD $)

☐ Show active currencies only | New Exchange Rate | New Currency | Actions ▾

Active	Currency	Current Exchange Rate	Exchange Rate	From	To
✔	▾ Canadian Dollar (CAD $)	1.309			
			1.309	2/1/2019	Future
			1.347	1/1/2019	1/31/2019
			1.328	12/1/2018	12/31/2018
			1.31	Past	11/30/2018
✔	▾ Euro (EUR €)	0.88			
			0.88	Past	Future
✔	▾ Swedish Krona (SEK kr)	9.22			
			9.22	Past	Future

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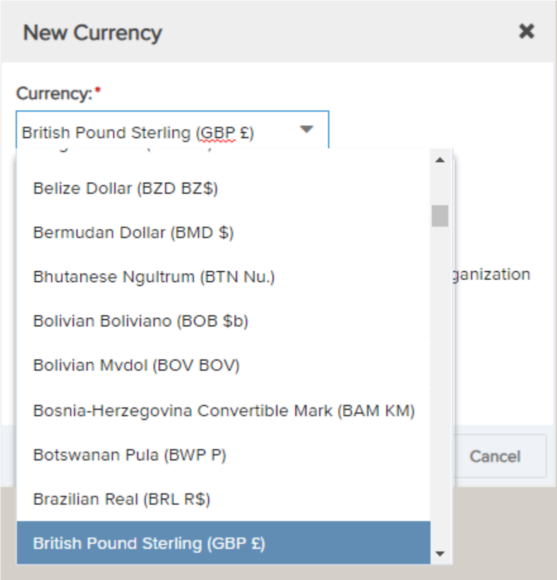
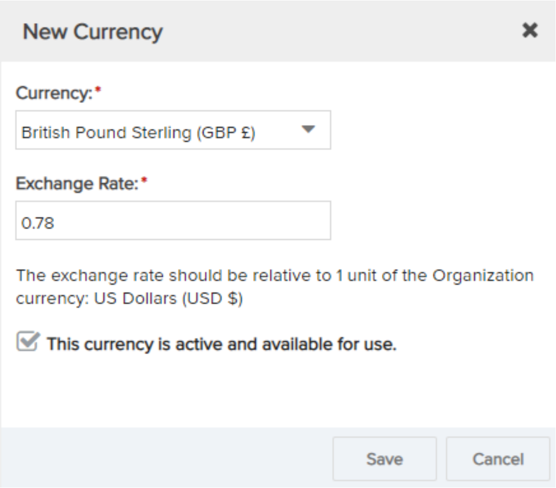
Multi-Currency – Beta

- Enter exchange rates





Multi-Currency – Beta

- Assign currency to internal rate tables
  - Organization currency is default currency

Internal Rates

Show: ☑ Active ☐ Retired ☐ Inactive   New Rate   New Rate Table   Actions

Status	Default	Title	Description	Currency	Current Internal Rate	Rate Table		
						Internal Rate	From	To
Active	✔	Default Zero Rate	Zero Rate	US Dollar (USD $)	0.00			
						0.00	Past	Future
Active		Internal Rate-Tier 1	Interal Rate-Tier 1	Canadian Dollar (CAD $)	55.00			
						55.00	Past	Future
Active		Internal Rate-Tier 2	Internal Rate-Tier 2	US Dollar (USD $)	60.00			
						60.00	Past	Future
Active		Internal Rate-Tier 3	Internal Rate-Tier 3	US Dollar (USD $)	70.00			
						70.00	Past	Future
Active		Internal Rate-Tier 4	Internal Rate-Tier 4	US Dollar (USD $)	75.00			
						75.00	Past	Future
Active		Internal Rate-Tier 5	Internal Rate-Tier 5	US Dollar (USD $)	80.00			
						80.00	Past	Future
Active		Internal Rate-Tier 6	Internal Rate-Tier 6	US Dollar (USD $)	90.00			
						90.00	Past	Future

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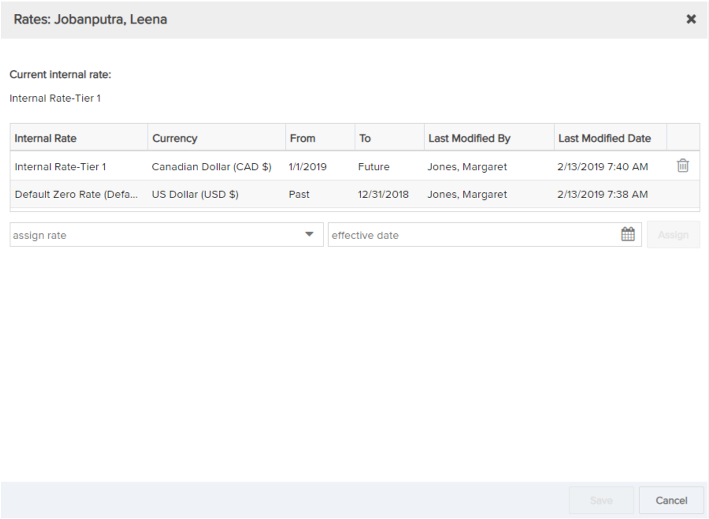
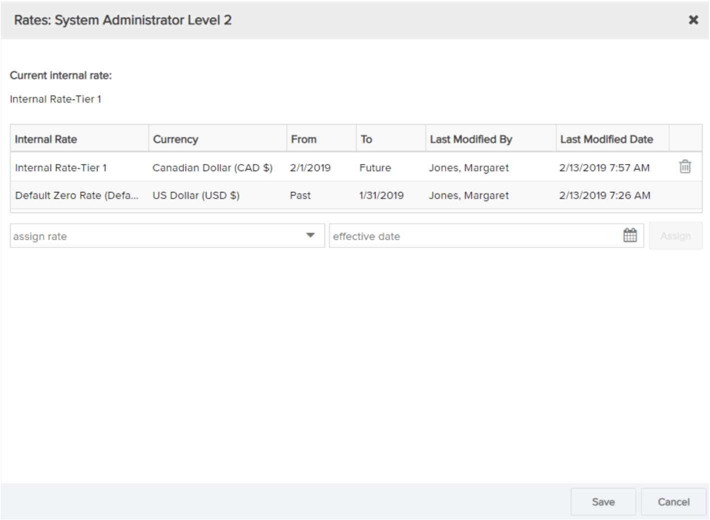
Multi-Currency – Beta

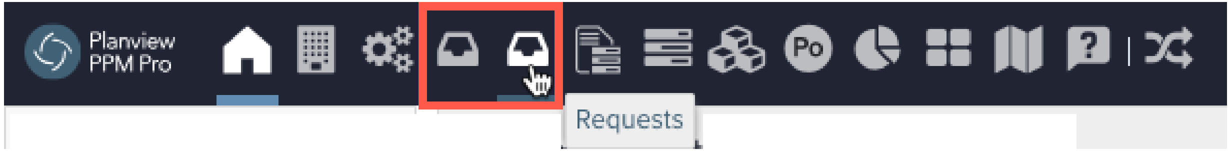
- Assign rate tables to rates





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



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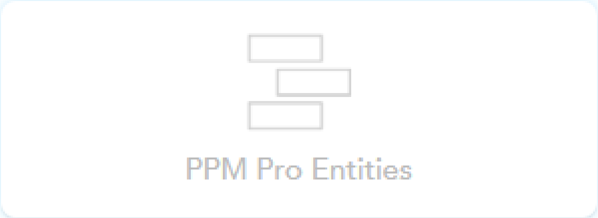
Request Revamp – Review

- Documentation on Customer Success Center



Requests (Beta)

- Known Issues - Requests (Beta)
- Transitioning from Legacy to New Requests
- Request FAQs
- About Requests (Beta)
- Managing Requests (Workflow)
- Working with the Requests List (Beta)
- Working with the Card View (Beta)
- Creating, Editing, and Deleting Requests (Beta)
- Associating Requests and Creating Associated Entities (Beta)
- Request Notes and Attachments (Beta)
- Request Reporting (Beta)
- Scoring Requests (Beta)

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

- Copy categories with gates
- Multiple approvers
- Advanced gate logic
- Data Import
- API – reveal on Admin/Web Services section

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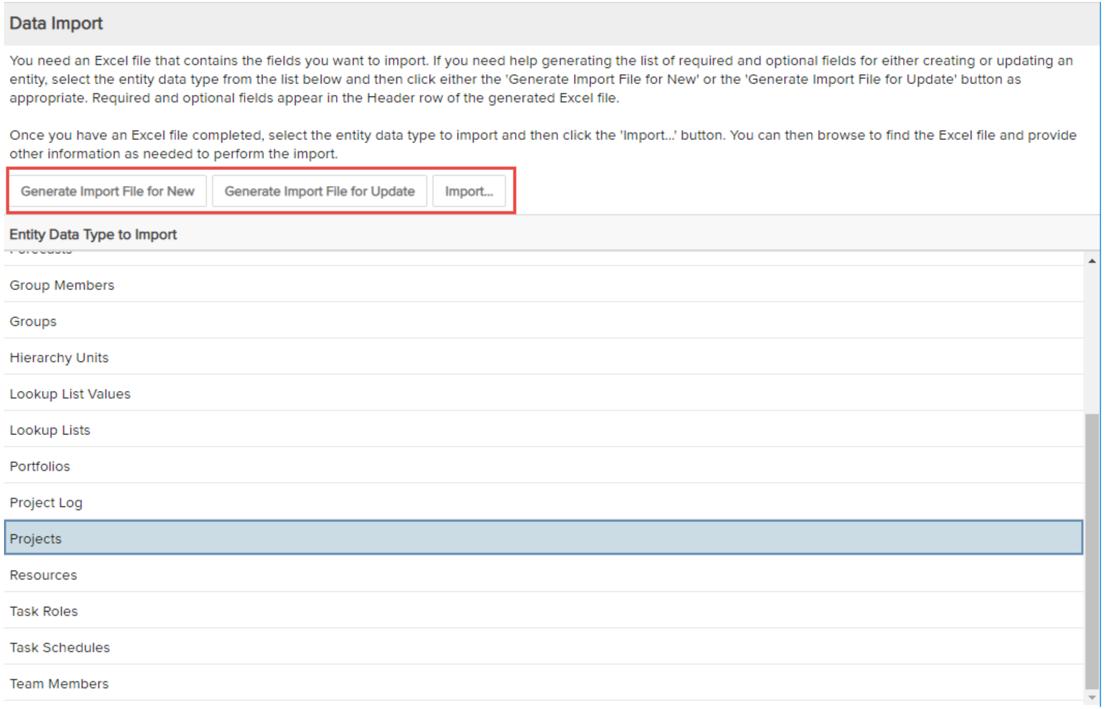
Enhancements This Month

- Updated Data Import UI
- Improved Change History dialog – Actions column

Updated Data Import UI



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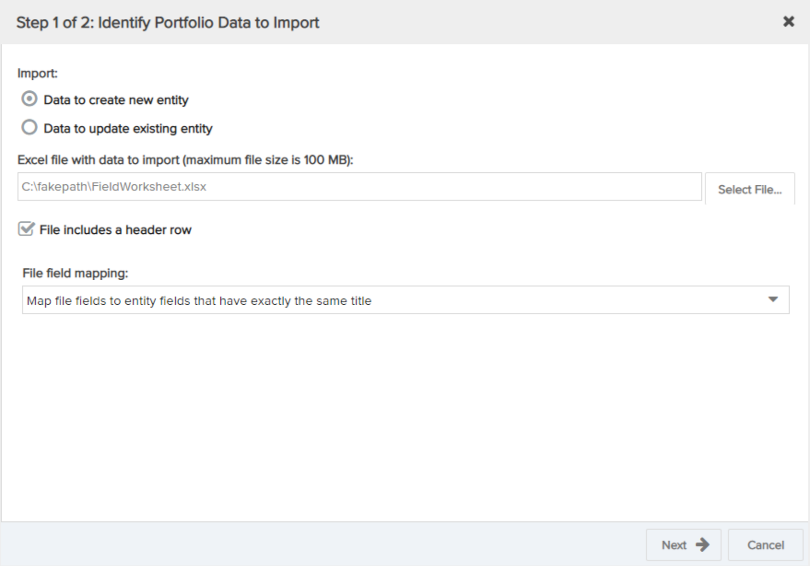
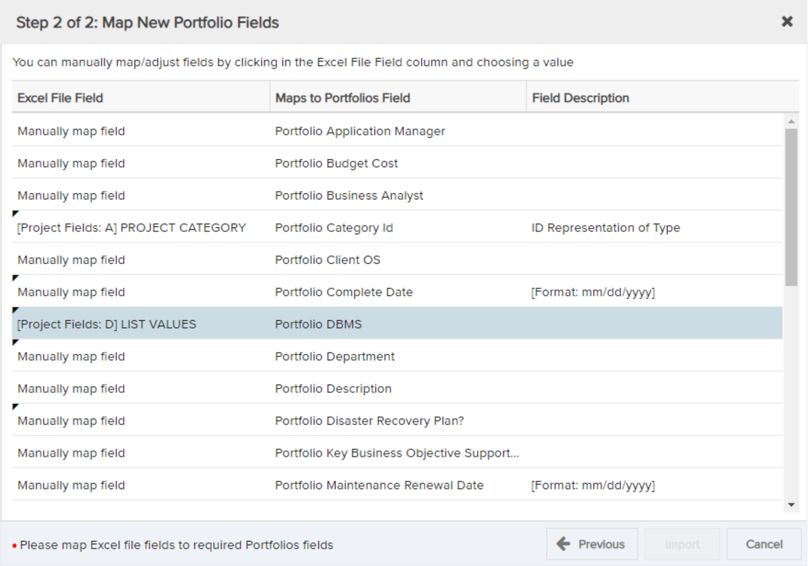
Updated Data Import UI





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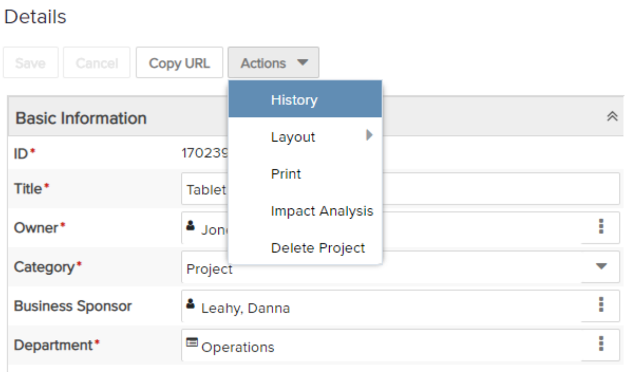
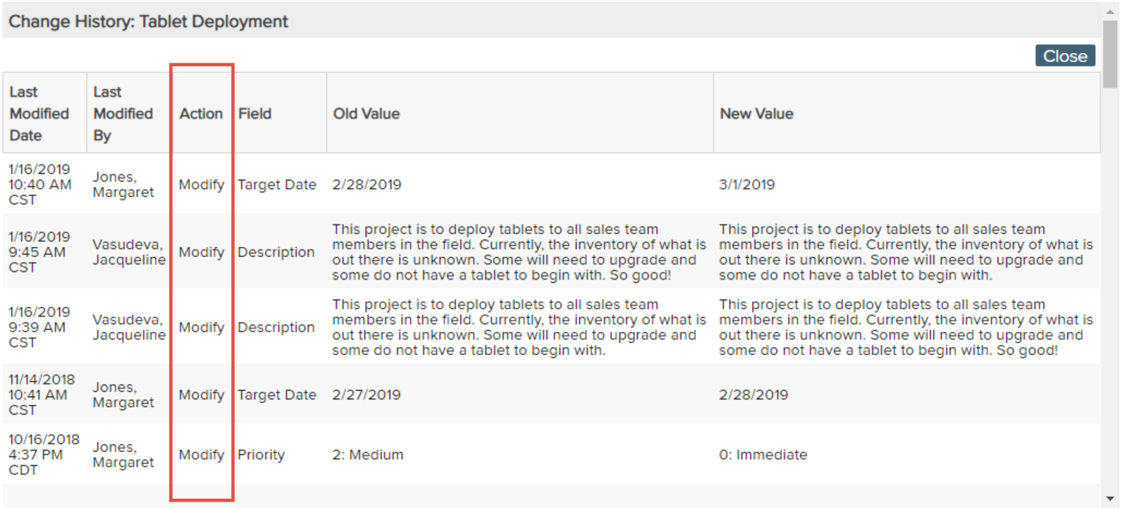
Change History Updates

- New Action column for each record





Last Modified Date	Last Modified By	Action	Field	Old Value	New Value
1/16/2019 10:40 AM CST	Jones, Margaret	Modify	Target Date	2/28/2019	3/1/2019
1/16/2019 9:45 AM CST	Vasudeva, Jacqueline	Modify	Description	This project is to deploy tablets to all sales team members in the field. Currently, the inventory of what is out there is unknown. Some will need to upgrade and some do not have a tablet to begin with. So good!	This project is to deploy tablets to all sales team members in the field. Currently, the inventory of what is out there is unknown. Some will need to upgrade and some do not have a tablet to begin with.
1/16/2019 9:39 AM CST	Vasudeva, Jacqueline	Modify	Description	This project is to deploy tablets to all sales team members in the field. Currently, the inventory of what is out there is unknown. Some will need to upgrade and some do not have a tablet to begin with.	This project is to deploy tablets to all sales team members in the field. Currently, the inventory of what is out there is unknown. Some will need to upgrade and some do not have a tablet to begin with. So good!
11/14/2018 10:41 AM CST	Jones, Margaret	Modify	Target Date	2/27/2019	2/28/2019
10/16/2018 4:37 PM CDT	Jones, Margaret	Modify	Priority	2: Medium	0: Immediate

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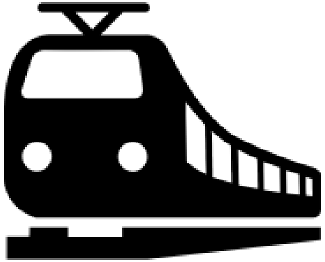
Coming Soon

- Request Revamp Beta continues
- Multi-Currency Support Beta continues



Upcoming Webinars and Events

- PPM Pro Roadmap Review
  - February 19th, 10am CT
- Leveraging LeanKit with PPM Pro
  - March 27, 10:30am CT

Q&A