



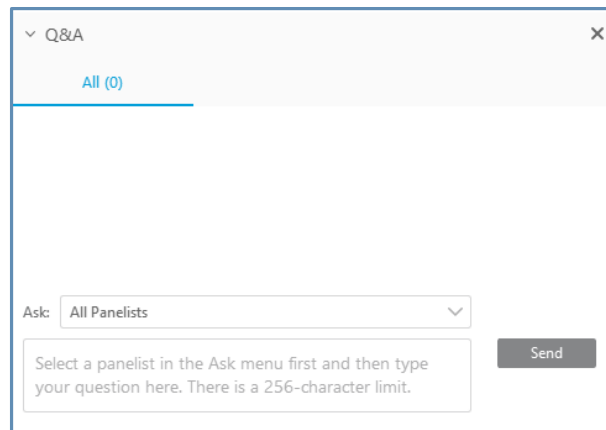
# PPM Pro Customer Webinar: February 2019 Release

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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



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 section labeled 'All (0)' in blue text. The main area of the window is empty. 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 'Send' button.



# 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



# Find the release notes on the web

[https://success.planview.com/Planview\\_PPM\\_Pro](https://success.planview.com/Planview_PPM_Pro)

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# Monthly Release Schedule

First  
Friday

- Release Notes Published

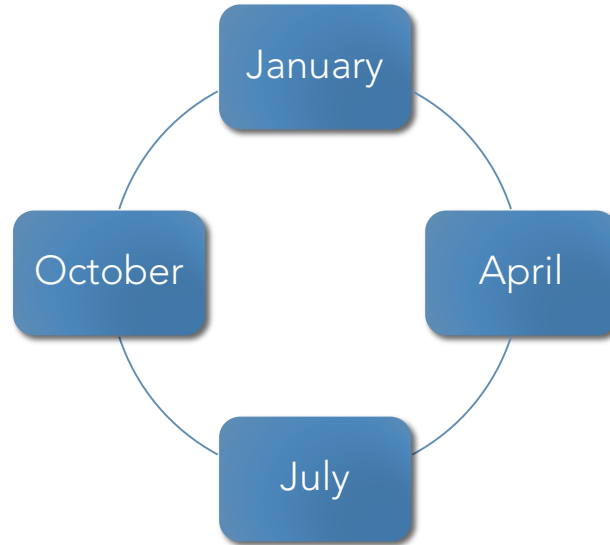
Second  
Friday

- 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 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





# Current Month's Feature Status



**Beta**

Requests Revamp (rolling)  
Support for multiple currencies



**GA**

# 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)

Localization Settings	
Locale	US
Default Time Zone *	America/Los_Angeles
Currency	US Dollar USD

- 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

# Multi-Currency – Beta

## Admin for Finances and Internal Rates

Title: \*

Admin for Finances and Internal Rates

Description:

Gives Admin group access for Finances and Internal Rates setup (N/A for Basic Mode).

### Permission Rules

Add ▼

Remove

Active	Rule Type	Scope
<input checked="" type="checkbox"/>	Global	All Users in Group 'Admin' have the selected permissions on all instances of the entity.

### Permission Hierarchy

- ▼ ☐ All Permissions
  - ▶ ☐ All Asset Classes
  - ▶ ☐ Dashboard
  - ▶ ☐ Filter
  - ▼ ☒ Organization Currencies
    - ☒ View
    - ☒ Edit
  - ▶ ☒ Organization Finance Settings
  - ▶ ☒ Organization Internal Rates
  - ▶ ☐ All Portfolio Classes
  - ▶ ☐ All Project Categories
  - ▶ ☐ Report
  - ▶ ☐ All Request Categories
  - ▶ ☐ Resource

# Multi-Currency – Beta

Sections

«

► Organization

All Divisions

All Departments

► Manage Time & Expense

▼ Finances

Internal Rates

Currencies

Settings

Finance Settings

Save

Cancel

☐ Manage Fiscal Year/Finance Month ⓘ

☒ Use multiple currencies ⓘ

Allow exchange rates to be edited up to 90 days in the past (maximum of 365 days)

☒ Use Internal rates ⓘ

Allow internal rates to be edited up to 90 days in the past (maximum of 365 days)

☒ Show today's current internal rate instead of the rate title for project staffing

☐ One rate

Rate name:

Internal Rate

☒ Two rates

Operational expense rate name:

OpEx Rate

Capitalizable expense rate name:

CapEx Rate

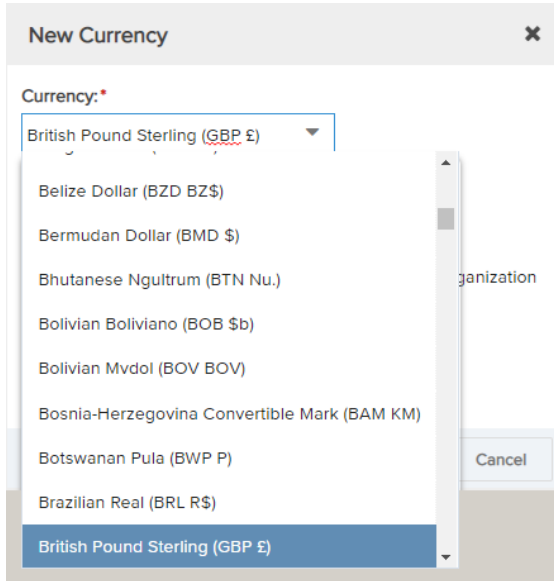
# Multi-Currency – Beta

- Create currency tables

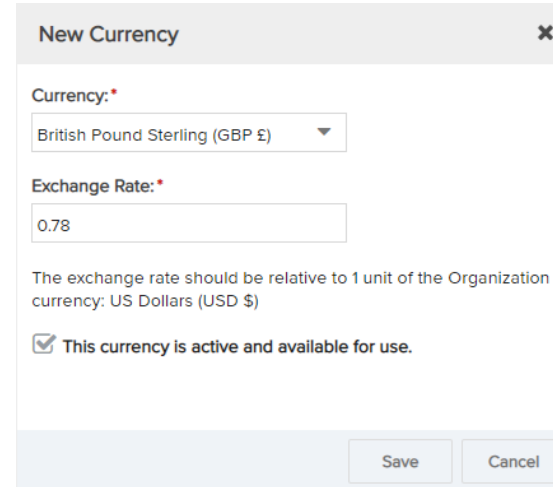
Currencies					
Add other currencies that projects, requests, and resource and role rates may use instead of the Organization currency. The exchange rates for these currencies should be relative to 1 unit of the Organization currency: US Dollars (USD \$)					
<input type="checkbox"/> Show active currencies only <a href="#">New Exchange Rate</a> <a href="#">New Currency</a> <a href="#">Actions</a> ▼					
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

# Multi-Currency – Beta

- Enter exchange rates



The screenshot shows a 'New Currency' dialog box with a close button (X) in the top right corner. The 'Currency:' field is a dropdown menu currently displaying 'British Pound Sterling (GBP £)'. Below the dropdown is a scrollable list of currencies, including Belize Dollar (BZD BZ\$), Bermudan Dollar (BMD \$), Bhutanese Ngultrum (BTN Nu.), Bolivian Boliviano (BOB \$b), Bolivian Mvdol (BOV BOV), Bosnia-Herzegovina Convertible Mark (BAM KM), Botswanan Pula (BWP P), Brazilian Real (BRL R\$), and British Pound Sterling (GBP £) which is highlighted at the bottom. A 'Cancel' button is located at the bottom right of the list.



The screenshot shows the 'New Currency' dialog box with the 'Currency:' dropdown set to 'British Pound Sterling (GBP £)'. The 'Exchange Rate:' field is a text input box containing the value '0.78'. Below the input box is a note: 'The exchange rate should be relative to 1 unit of the Organization currency: US Dollars (USD \$)'. There is a checked checkbox with the text 'This currency is active and available for use.' At the bottom right, there are 'Save' and 'Cancel' buttons.

# Multi-Currency – Beta

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

Internal Rates								
Show: <input checked="" type="checkbox"/> Active <input type="checkbox"/> Retired <input type="checkbox"/> Inactive <a href="#">New Rate</a> <a href="#">New Rate Table</a> <a href="#">Actions</a> ▼								
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	Internal 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



# Multi-Currency – Beta

- Assign rate tables to rates

Rates: Jobanputra, Leena

Current internal rate:

Internal Rate-Tier 1

Internal Rate	Currency	From	To	Last Modified By	Last Modified Date	
Internal Rate-Tier 1	Canadian Dollar (CAD \$)	1/1/2019	Future	Jones, Margaret	2/13/2019 7:40 AM	
Default Zero Rate (Defa...	US Dollar (USD \$)	Past	12/31/2018	Jones, Margaret	2/13/2019 7:38 AM	

assign rate

effective date

Assign

Save

Cancel

Rates: System Administrator Level 2

Current internal rate:

Internal Rate-Tier 1

Internal Rate	Currency	From	To	Last Modified By	Last Modified Date	
Internal Rate-Tier 1	Canadian Dollar (CAD \$)	2/1/2019	Future	Jones, Margaret	2/13/2019 7:57 AM	
Default Zero Rate (Defa...	US Dollar (USD \$)	Past	1/31/2019	Jones, Margaret	2/13/2019 7:26 AM	

assign rate

effective date

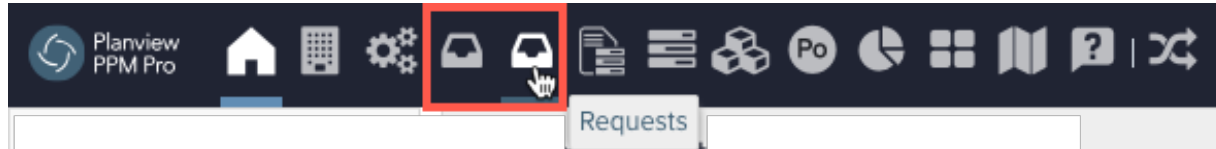
Assign

Save

Cancel

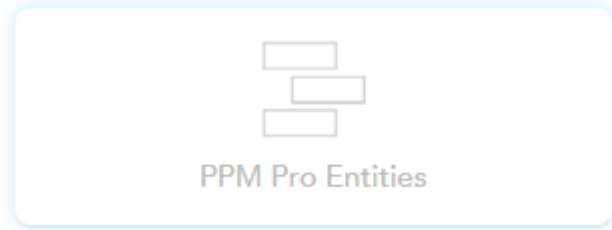
# Request Revamp – Review

- 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 – 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

# Enhancements This Month

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

# Updated Data Import UI

## Data Import

You need an Excel file that contains the fields you want to import. If you need help generating the list of required and optional fields for either creating or updating an entity, select the entity data type from the list below and then click either the 'Generate Import File for New' or the 'Generate Import File for Update' button as appropriate. Required and optional fields appear in the Header row of the generated Excel file.

Once you have an Excel file completed, select the entity data type to import and then click the 'Import...' button. You can then browse to find the Excel file and provide other information as needed to perform the import.

Generate Import File for New

Generate Import File for Update

Import...

### Entity Data Type to Import

Group Members

Groups

Hierarchy Units

Lookup List Values

Lookup Lists

Portfolios

Project Log

Projects

Resources

Task Roles

Task Schedules

Team Members

# Updated Data Import UI

Step 1 of 2: Identify Portfolio Data to Import

Import:

☒ Data to create new entity

☐ Data to update existing entity

Excel file with data to import (maximum file size is 100 MB):

C:\fakepath\FieldWorksheet.xlsx

Select File...

☒ File includes a header row

File field mapping:

Map file fields to entity fields that have exactly the same title

Next

Cancel

Step 2 of 2: Map New Portfolio Fields

You can manually map/adjust fields by clicking in the Excel File Field column and choosing a value

Excel File Field	Maps to Portfolios Field	Field Description
Manually map field	Portfolio Application Manager	
Manually map field	Portfolio Budget Cost	
Manually map field	Portfolio Business Analyst	
[Project Fields: A] PROJECT CATEGORY	Portfolio Category Id	ID Representation of Type
Manually map field	Portfolio Client OS	
Manually map field	Portfolio Complete Date	[Format: mm/dd/yyyy]
[Project Fields: D] LIST VALUES	Portfolio DBMS	
Manually map field	Portfolio Department	
Manually map field	Portfolio Description	
Manually map field	Portfolio Disaster Recovery Plan?	
Manually map field	Portfolio Key Business Objective Support...	
Manually map field	Portfolio Maintenance Renewal Date	[Format: mm/dd/yyyy]

Please map Excel file fields to required Portfolios fields

Previous

Import

Cancel

# Change History Updates

- New Action column for each record

## Details

Save Cancel Copy URL Actions ▾

**Basic Information**

ID\* 170239

Title\* Tablet

Owner\* Jon

Category\* Project

Business Sponsor Leahy, Danna

Department\* Operations

History

Layout

Print

Impact Analysis

Delete Project

## Change History: Tablet Deployment

Close

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



# Coming Soon

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



# Upcoming Webinars and Events

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



# Q&A

