



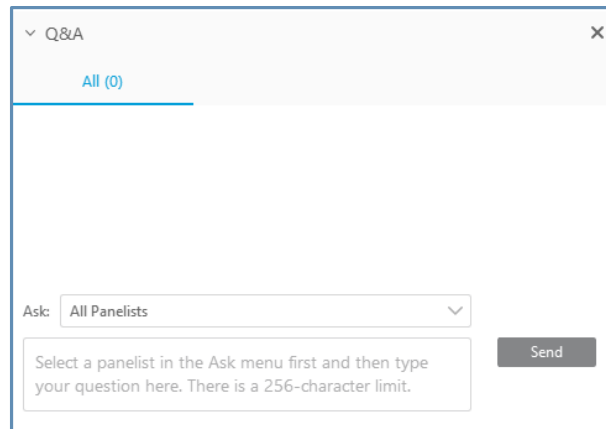
PPM Pro Customer Webinar: March 2019 Release

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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 interface. At the top, there is a header bar with a dropdown arrow and the text "Q&A", and a close button (X) in the top right corner. Below the header, the text "All (0)" is displayed. The main area is a large, empty white box. At the bottom, there is a section labeled "Ask:" followed by 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.



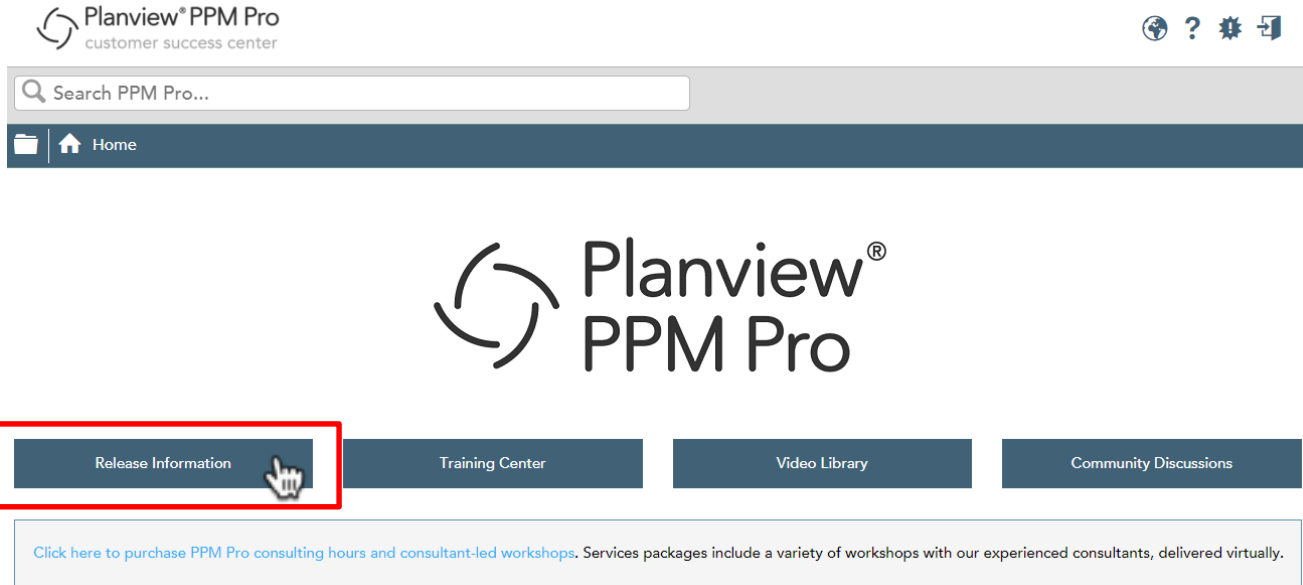
Today's Agenda

- Monthly Release Process and Sandboxes
- Planview Horizons
- 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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Release Information Training Center Video Library Community Discussions

[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

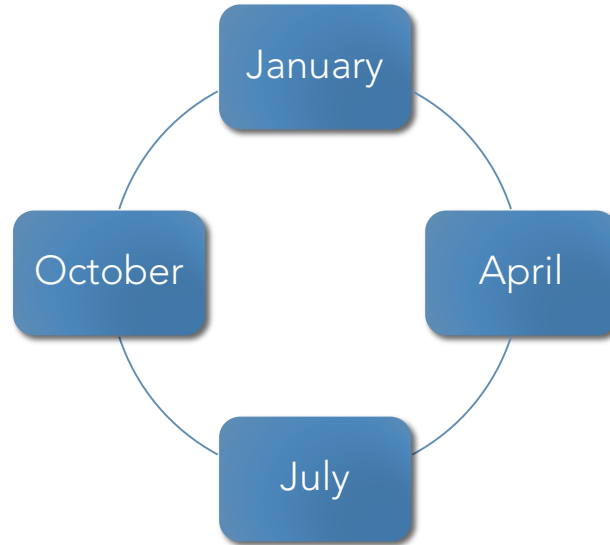
Second
Friday

- 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 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

Beta Functionality

- **Rollups**
- **Reporting**
- Data Import – update existing entities accommodate currencies
- 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

- API –accommodate currency when creating entities
- 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

Save Cancel

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

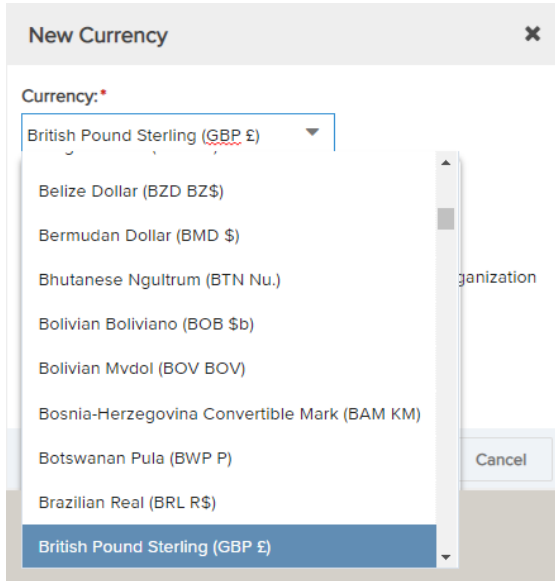
Multi-Currency – Beta

- 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 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

Multi-Currency – Beta

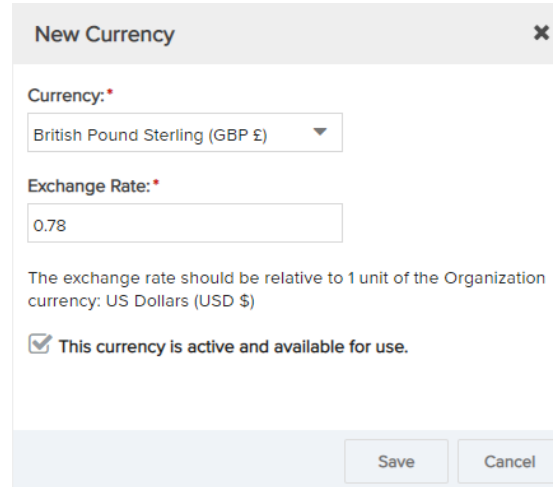
- Enter exchange rates



The screenshot shows the 'New Currency' dialog box with a list of currencies. The 'Currency:' field is set to 'British Pound Sterling (GBP £)'. The list includes:

- British Pound Sterling (GBP £)
- 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\$)
- British Pound Sterling (GBP £)

A 'Cancel' button is visible at the bottom right of the list.



The screenshot shows the 'New Currency' dialog box with the 'Exchange Rate:' field set to '0.78'. Below the field, a note states: 'The exchange rate should be relative to 1 unit of the Organization currency: US Dollars (USD \$)'. A checkbox labeled 'This currency is active and available for use.' is checked. 'Save' and 'Cancel' buttons are at the bottom right.

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 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	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

Multi-Currency Beta

Admin Documentation on Customer Success Center



PPM Pro Administrator Documentation

Multi-Currency Support (Beta)

 [Multi-Currency: Getting Started and Known Issues](#)

 [Multi-Currency Overview](#)

 [Currency Permissions](#)

 [Effective Dates for Currency Exchange Rates](#)

 [Creating Currency Tables](#)

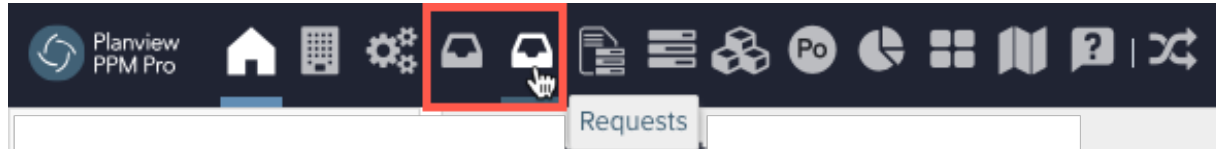
 [Assigning a Currency to a Project](#)

 [Assigning a Currency to Roles and Resources](#)

 [Multi-Currency and Reports, Dashboards and Filters](#)

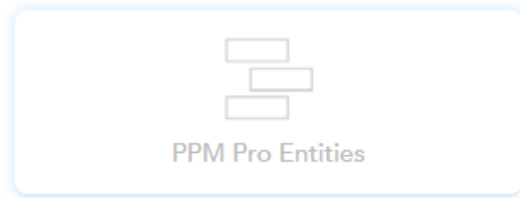
Request Revamp – Review

- 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

- End-User Documentation on Customer Success Center

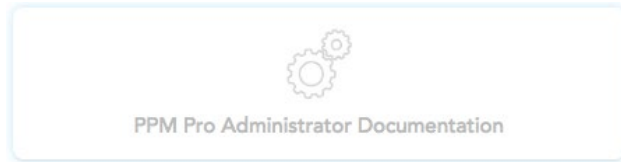


Requests (Beta)

-  [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 – Review

- Admin Documentation on Customer Success Center



Requests (Beta)

- [Transitioning from Legacy to New Requests](#)
- [Requests FAQs](#)
- [Requests Overview for Administrators](#)
- [Creating Categories for Requests](#)
- [Creating Gates](#)
- [Configuring Gate Fields/Show on New](#)
- [Gate Approval Examples](#)
- [Configuring Available Fields for Requests](#)
- [Creating Field Restrictions for Requests](#)
- [Creating Custom Fields for Requests](#)
- [Designing Details for Requests](#)
- [Mapping Request Fields to Fields in Associated Entities](#)
- [Laying Out the Grid Columns for Requests](#)
- [Designing Cards for Requests](#)
- [Configuring Searchable Fields](#)
- [Setting Up Permissions for Requests](#)
- [Setting Up Request Scoring](#)

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
- Copy categories with gates

Future Releases

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

Enhancements

- When exporting a PPA scenario to Excel, the Scorecard details (including optimization suggestions) are included in the Report Details tab, and the included/excluded projects are placed in a new sheet in the spreadsheet.

Enhancements

- The "Unit" field has been added to the project entity's available fields. This field is a droplist of units configured in your organization's unit hierarchy. This is useful for reporting or grouping projects, where you want a single unit for a given project.

Coming Soon

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



Upcoming Webinars and Events

- Leveraging LeanKit with PPM Pro
 - March 27, 10:30am CT



Q&A

