



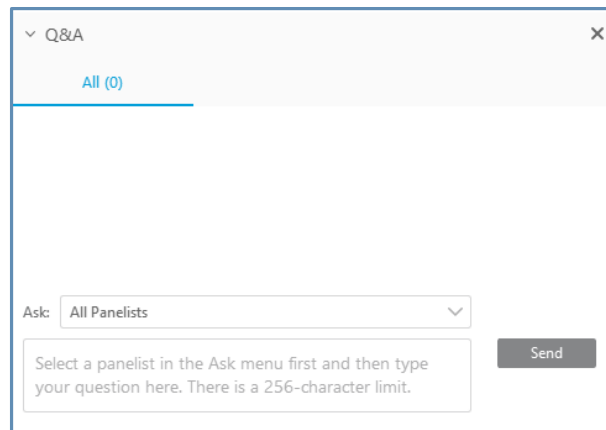
PPM Pro Customer Webinar: April 2019 Release

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



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 box for questions. 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
- Planview Horizons
- Rolling Beta features
- New Features
- Task-Level Expenses Deprecation
- Reporting Update
- 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

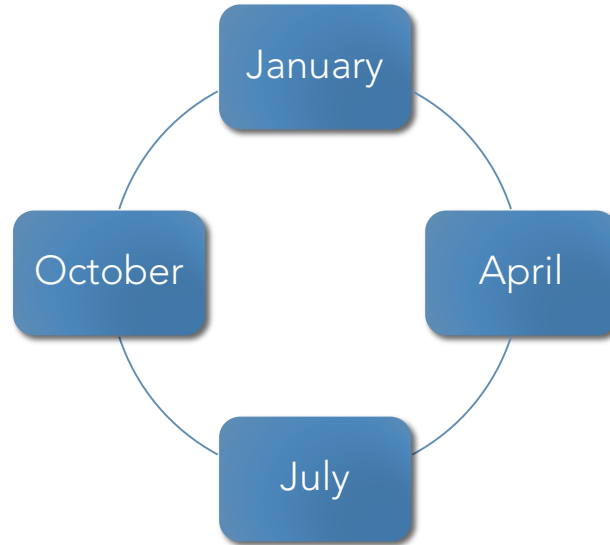
Second
Friday

- 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

In-application content

Multi-Currency – Beta

Beta Functionality

- API – accommodate currency when creating entities
- 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

- Based on customer feedback

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

- Multi-currency is enabled by Planview Customer Care
- Make sure Org currency 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

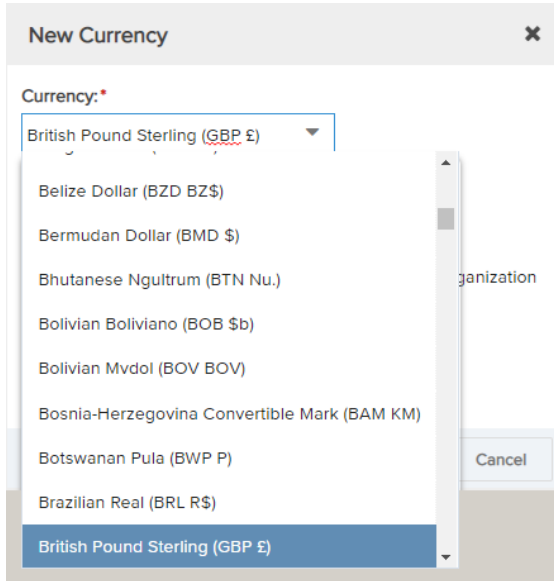
Multi-Currency – Beta

- 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 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

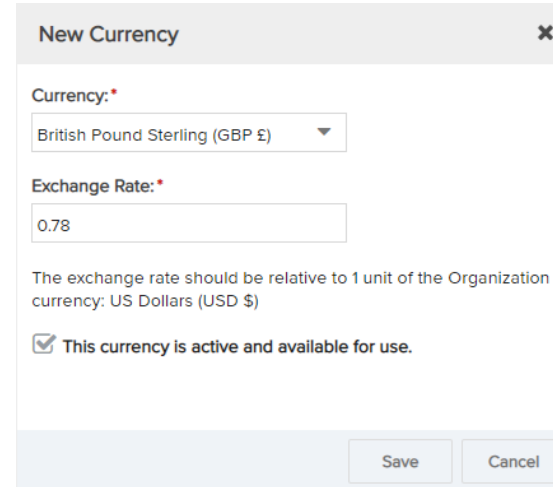
- Enter exchange rates



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

End-User 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](#)

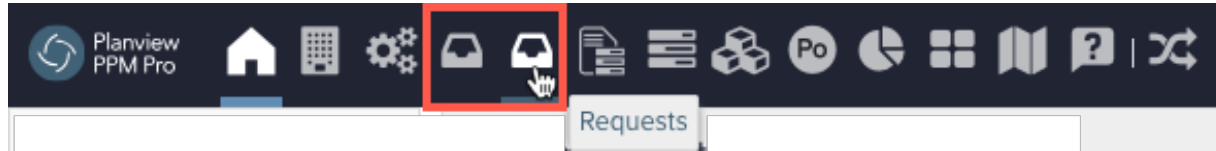
 [Assigning a Currency to a Project](#)

 [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 – Rolling Beta

Current Beta Functionality

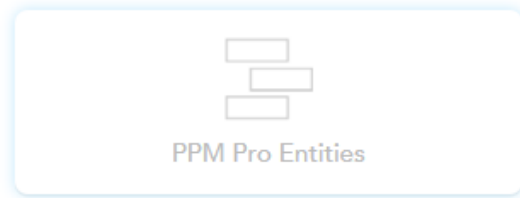
- New Requests UI for composing requests
- Configure request types using Self-Service Administration
- New graphical, status-based card view
- Associate requests with new and existing projects, tasks, and issues
- New Request Status field
- Ability to copy notes and attachments to associated entities
- 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
- Associate/create projects, tasks, issues after request is approved

Future Releases













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

Request Revamp – Review

- **User** Documentation on Customer Success Center

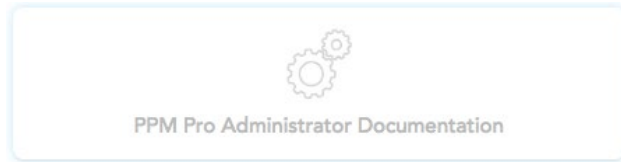


Requests (Beta)

-  [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](#)

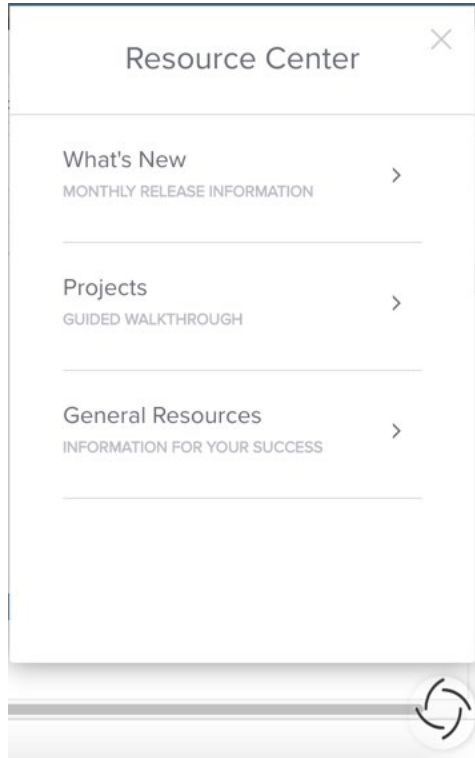
In-application Content

The screenshot displays the Planview PPM Pro interface. The top navigation bar includes links for Home, Organization, Admin, Reports, Dashboards, and Projects. A search bar is present with the text 'Q Projects' and a placeholder 'Type Keywor...'. Below the navigation bar, the page title is 'Projects (111)'. A filter bar shows 'Project' and 'Filter Projects'. A table of projects is displayed with columns: Title, All Health Icons, Status, Start Date, Target Date, Implied Status, Create Date, and Category. The table lists 11 projects with various statuses like Proposed, In Progress, Completed, and Canceled. A red arrow points to a circular refresh icon in the bottom right corner of the table area.

Title ↑	All Health Icons	Status	Start Date	Target Date	Implied Status	Create Date	Category
! 07.13.2018 Test ...		Proposed			2	7/13/2018	Project
! 08.2.2018 Test ...		In Progress	8/2/2018	8/2/2018	1	8/2/2018	Project
! Costs testing		Proposed	9/18/2018	9/18/2018	2	9/18/2018	Project
! Currency Test		In Progress			1	2/26/2019	Project
! Currency Test_2		In Progress			1	2/26/2019	Project
! ssf		Proposed	12/10/2018	12/12/2018	2	12/11/2018	Project
!Data Import test		Proposed	12/13/2018	12/13/2018	2	12/13/2018	Project
!Dates!		Proposed	10/12/2018	12/12/2018	2	12/13/2018	Project
!Permissions test1		In Progress	1/1/2019	1/1/2020	1	6/6/2017	Project
!Permissions Test2		Completed			0	6/6/2017	Project
!Sample Template		Canceled			0	4/26/2017	Project

Famous Frames (ftrue@documentation/innotes)

In-application Content



- Provide timely content – links to current release notes, webinar registration links
- Provide guided, context-specific tutorials (currently only on the Projects list page)
- Provide links to resources such as the Monthly Newsletter, Inner Circles, video library, and more
- Will add content incrementally

Task-Level Expenses Deprecation

- Oct 2019 release
- “New” button will go away
- Can still report on historical data
- See Transition to Project-Level Expenses topic:
<https://success.planview.com/Planview PPM Pro/150 PPM Pro Administrator Documentation/070 Setting Up Entities/Project Financial Entries/005 Transitioning from Task-Level to Project-Level Expenses>

Reporting Update

- 1Q2019: PPM Pro dev and Birst dig into architecture and design
- Necessary pivot:
 - Birst is an excellent BI platform, the clear winner for the vendors we evaluated
 - Both Birst and PPM Pro believed we could make this work
 - In digging into architecture and connections, both Birst and PPM Pro determined we were wrong 😞

Reporting Update

- PPM Pro Product Management held 2 inner circle meetings the first week in April to discuss the pivot that included extensive Q&A.
- We will send out the link to the recordings
- Rather than repeat the QA here, please download and listen to Sherrill's discussion. If you have additional questions, please feel free to post them on the Disqus Community Forum that is accessible on the CSC.

Inner Circles

- Two inner circles:
 - User Experience
 - Reporting and Artifacts
- https://success.planview.com/Planview_PPM_Pro/Release_Information/Announcements%2F%2FSupplemental_Product_Information/Announcements/Announcement%3A_PPM_Pro_Inner_Circles

Coming Soon

- Request Revamp Beta continues
 - Multiple approvers targeted for May
- Multi-Currency
 - GA target for May
- PPM Pro - LeanKit Integration Phase 1 (limited Beta)





Q&A

