



PPM Pro Customer Webinar: May 2019 Release

Thanks for joining! We'll start 1 minute after the bottom of the hour.





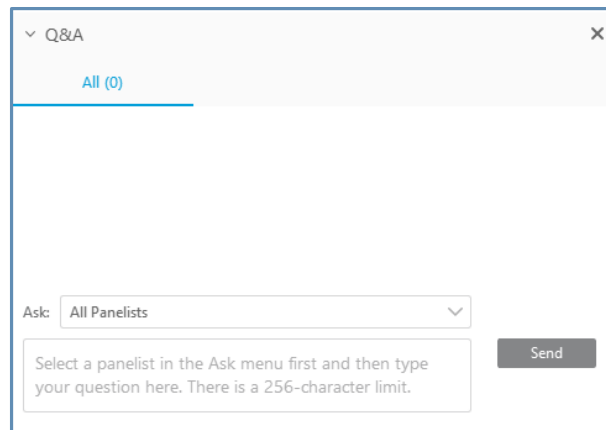
PPM Pro Customer Webinar: May 2019 Release

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) in the top right corner. Below the header, the text "All (0)" is displayed. The main area of the window is empty. 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
- Coming Soon
- Q&A



Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro

Planview® PPM Pro
customer success center

Search PPM Pro...

Home

Planview®
PPM Pro

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

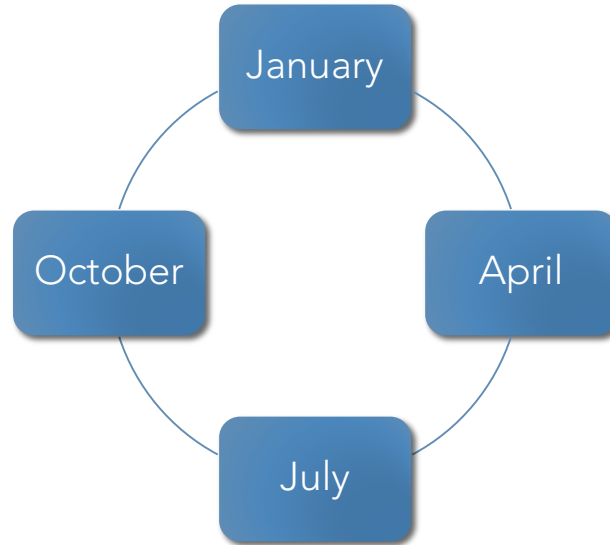
Second
Friday

- 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.

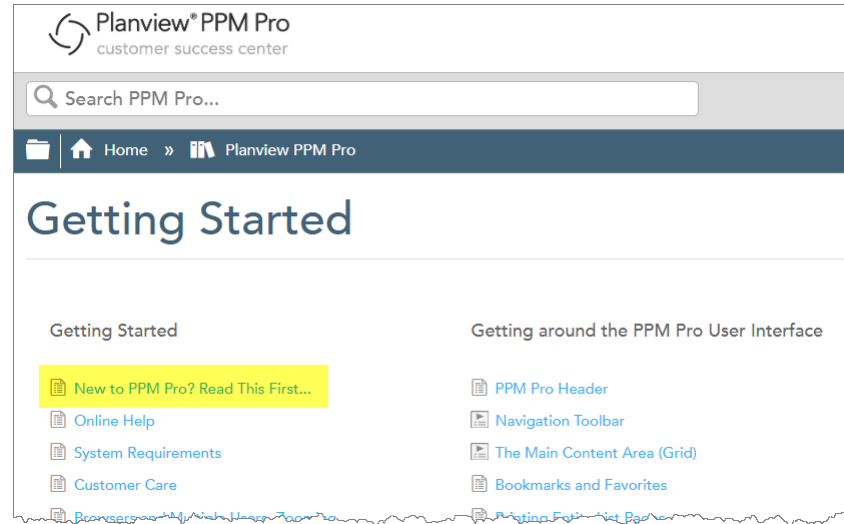
Get early access to features in your sandbox

- 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



New to PPM Pro?



<https://success.planview.com/Planview PPM Pro/010 Getting Started/010 Getting Started/003 New to PPM Pro>

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)
PPM Pro / LeanKit Integration
(Phase 1 Limited Beta)



GA

Support for multiple currencies

PPM Pro-LeanKit Integration

(Phase 1 Limited Beta)

- Available for customers with existing LeanKit licenses
 - Contact PPM Pro Product Management for a demo
- Supports automatic creation of a LeanKit card when a PPM Pro project is created
- Standard LeanKit fields provided in PPM Pro for tracking information such as Actual Finish, Card Lane Status, Card URL, Complete Cards

PPM Pro-LeanKit Integration

(Phase 1 Limited Beta)

- Create a new PPM Pro project
- Syncs to LeanKit as a card

New Project Step 2 of 2: Complete Project Details

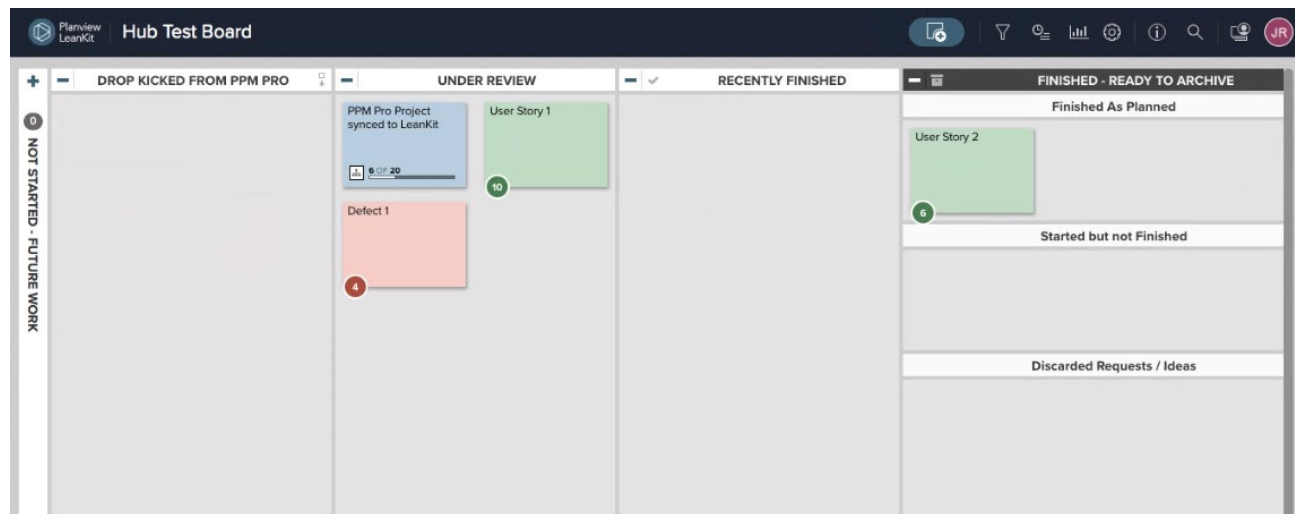
Title * PPM Pro Project synced to LeanKit		Progress	
Innovation Type		Status *	Active
Owner *	Administrator, Innotes	Start Date	
Description		Target Date	
Objective		Completion Date	
Alignment		LeanKit	
Department		LK Sync with LeanKit <input checked="" type="checkbox"/>	
Priority		Scoring	
General Settings		Scoring Profile	
Confidential Project	No		
Health Profile	None		
Allocation Units *	Headcount		
Resource Planning Mode *	Project		
Alternate PM Timesheet Approver			
Can Be Template *	No		

Previous Save Cancel

PPM Pro-LeanKit Integration

(Phase 1 Limited Beta)

- Create associated work as child cards in LeanKit
- Assign sizing values (story points, estimated hours, t-shirt sizing)



PPM Pro-LeanKit Integration

(Phase 1 Limited Beta)

- Summary data about cards is synced back to PPM Pro project

LeanKit Summary Data	LeanKit Card Data
Sync with LeanKit? <input checked="" type="checkbox"/>	Complete Cards 0
Card URL https://d08.leankit.io/card/10119329405	In Progress Cards 20
Total Cards 20	Not Started Cards 0
Priority Normal	Blocked Cards 0
Top Lane Under Review	% Complete 0.00%
Card Lane Status Started	Missed Start Child Cards 0
Card Type New Feature	Missed Finish Child Cards 0
Planned Start 5/14/2019	Earliest Planned Start
Actual Start 5/14/2019	Earliest Actual Start 5/14/2019
Planned Finish	Latest Planned Finish
Actual Finish	Latest Actual Finish
Blocked Flag	Exception Count 0
	Exception % 0.00%

Multi-Currency – GA May 2019

- Multi-currency is enabled by Planview Customer Care
- Every organization has an organization-wide currency, sometimes referred to as the default (Admin/Organization/Info)



The screenshot shows a 'Localization Settings' panel with a light gray header and a white body. The header contains the text 'Localization Settings' and a small upward-pointing arrow icon. The body contains three rows of settings: 'Locale' with the value 'US', 'Default Time Zone*' with a dropdown menu showing 'America/Los_Angeles' and a three-dot menu icon, and 'Currency' with a dropdown menu showing 'US Dollar USD'. The 'Currency' dropdown is highlighted with a red rectangular border.

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

- Make sure Org currency is correct before adding currencies
- All exchange rates calculated against the Organization currency

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](#)

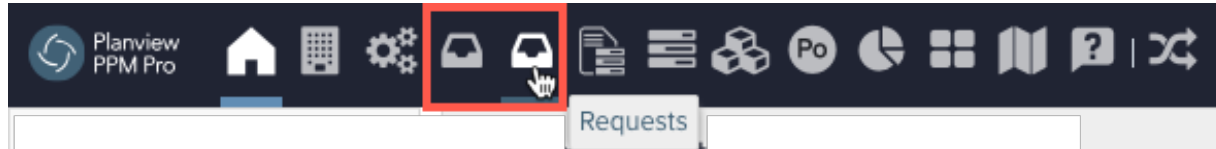
 [Assigning a Currency to a Project](#)

 [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
- Self-Service Administration configuration
- New graphical, status-based card view
- Associate requests with new and existing projects, tasks, and project logs
- New Request Status field
- Ability to copy notes and attachments to associated entities
- Permission profile updates
- Reporting
- Scoring
- Gates/Notifications
- Single Approvers
- Copy categories with gates
- Associate/create projects, tasks, issues after request is approved
- Out-of-the-box filters
- Improvements in field mappings to other entities

Future Releases

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

Request Revamp – Out-of-the-Box Filters

The screenshot displays the Planview PPM Pro interface. At the top, a dark navigation bar contains various icons and a search bar labeled 'Find All' with the placeholder text 'Type Keyword, ID...'. Below this, a light gray header bar shows 'All Requests (18)' and a filter dropdown menu. The filter menu is open, showing a list of filters: '+Requests I Can Score' (selected), '+Requests I Can Approve', '+Requests I Created', and '+Requests I Requested'. Below these are links for '(view recent filters)' and '(manage filters)'. A 'Filterable Fields' section lists various fields like 'Assigned To', 'Associated Entity Id', etc. The main table below the header lists 18 requests with columns for Title, ID, Status, and Requester. The first row is 'Critical Request' with ID '1975952...', Status 'In Progress', and Requester 'Jones, Margaret'. The table is partially obscured by the filter overlay.

Title	ID	Status	Requester
Critical Request	1975952...	In Progress	Jones, Margaret
Customer Treats	2044179...		Jones, Margaret
New Charter	204566...		Jones, Margaret
New Product Launch	1975952...	In Progress	Richards, Margaret
New Request to Create Project	203897...	In Progress	Jones, Margaret
New Test	204080...	New	Jones, Margaret
Outlook Upgrade	1975952...		Jones, Margaret
Outlook Upgrade Part 2	2044180...		Jones, Margaret
Request for New Work	1975952...	Approved	Jones, Margaret
Required to Save	2044178...		Jones, Margaret
Sample Request	204484...		Jones, Margaret
Show on New	204256...		Jones, Margaret
Tablet Deployment	1975952...	In Progress	Jones, Margaret
Test	2044178...		Jones, Margaret

Request Revamp – Improved Mapping

New Project Step 2 of 3: Optionally Copy data from Request to Project

The fields listed below have been mapped by your administrator to the Project category. You can choose to copy any of these fields into the new Project. If you don't see a field that you were expecting, contact your administrator to request that it be mapped. If you are using a template to create a project, note that the field values of any request fields you choose to copy will overwrite corresponding fields values in the project template.

<input type="checkbox"/> Source Field	Copy Data	Target Field
<input type="checkbox"/> Request: Brief Description of Proposed Soluti...		Project: Description
<input type="checkbox"/> Request: Desired Start Date	5/17/2019	Project: Start Date
<input type="checkbox"/> Request: Requester	👤 Ebert, Colin	Project: Owner
<input type="checkbox"/> Request: Business Sponsor	👤 Archilla, Yessica	Project: Business Sponsor
<input type="checkbox"/> Request: Business Value	2: Medium	Project: Risk
<input type="checkbox"/> Request: Department	Product Development	Project: Department
<input type="checkbox"/> Request: Title	New Charter	Project: Title
<input type="checkbox"/> Request: Desired Completion Date	5/24/2019	Project: Target Date

☐ Copy Request attachments☐ Copy Request notes

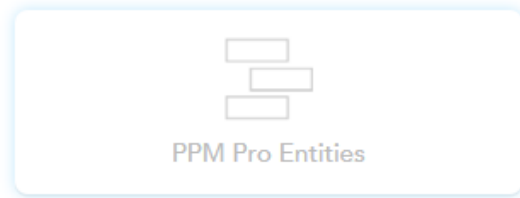
← Previous

Next →













Cancel

Request Revamp – Review

- **User** Documentation on Customer Success Center

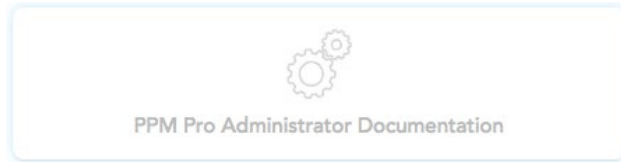


Requests (Beta)

-  [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

Planview PPM Pro

Find All Type Keyword, ID...

Projects (19)

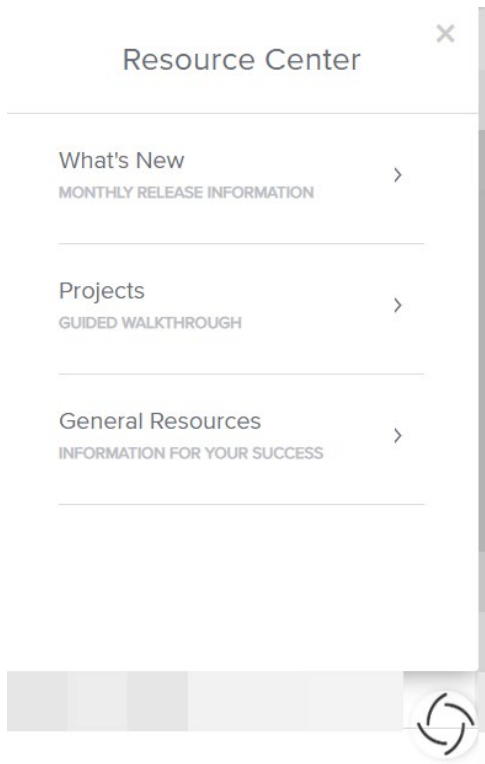
All Categories Status: +Open

Open New Actions

Title ↑	Owner	Category	Department	Priority	Status	Start Date	Target Date	Completion Da...
Customer Care Portal Upgrade	Jones, Margaret	Project	Operations		Open	2/1/2018	9/20/2018	
Data Center Consolidation	McMechan, Lamar	Maintenance	Operations	1: High	Open	3/30/2017	7/31/2017	
EA Go Forward Strategy	Medeiros, Kristyn	Project	New Business	2: Medium	Open	10/1/2016	3/31/2017	
FY Application Development	Jones, Margaret	Project	Product Management	2: Medium	Open	7/18/2016	11/20/2018	
FY Critical Strategic Project	Jones, Margaret	Strategic	Development	2: Medium	Open	1/1/2017	12/31/2017	
FY Release Management	Jones, Margaret	Project	Product Management	2: Medium	Ongoing	9/1/2016	12/31/2017	
FY Strategic Initiative	Earley, Amy L	Project	Development	2: Medium	Open	5/15/2017	12/31/2018	
Global Transparency	Jones, Margaret	Project	Development	2: Medium	Open	10/27/2017	2/28/2019	
Growth Strategy	Medeiros, Kristyn	Project	New Business	2: Medium	Open	11/1/2016	12/31/2018	
Infrastructure Upgrade Project	McMechan, Lamar	Project	Operations	1: High	Open	9/1/2017	12/31/2018	
OneDrive Rollout	Jones, Margaret	Project	Operations		Open	9/1/2018	12/31/2018	
Sales CRM Changes	Earley, Amy L	Project	Account Management	2: Medium	Open	1/19/2016	10/31/2018	
Support: Infrastructure Systems	Amos, Jeff	Maintenance	Operations	2: Medium	Ongoing	9/15/2016	12/31/2018	
Support: Oracle	Amos, Jeff	Maintenance	Operations	2: Medium	Ongoing	7/15/2016	12/31/2018	
Support: Web Services	Amos, Jeff	Maintenance	Operations	2: Medium	Ongoing	6/1/2017	1/31/2018	

Planview PPM Pro

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>

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

Upcoming Webinars

- Quarterly Roadmap Webinar
 - May 29, 10:30am CT
 - <https://info.planview.com/ppm-pro-2Q2019-roadmap-webinar-prm-en-reg.html>
- June Release Webinar
 - June 19, 10:30am CT



Q&A

