PPM Pro Customer Webinar: January 2020 Release

Thanks for joining! We'll start 1 minute after the bottom of the hour.
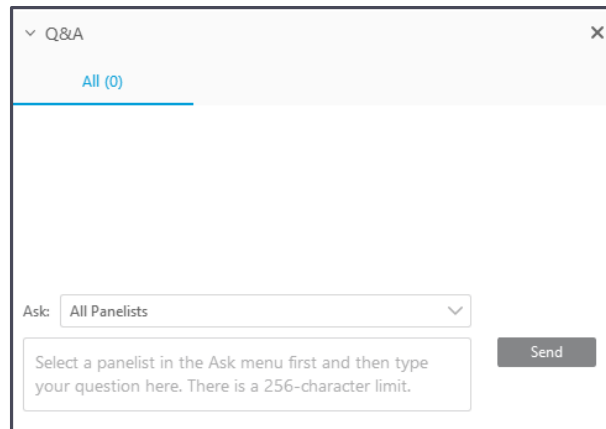
PPM Pro Customer Webinar:
January 2020 Release

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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
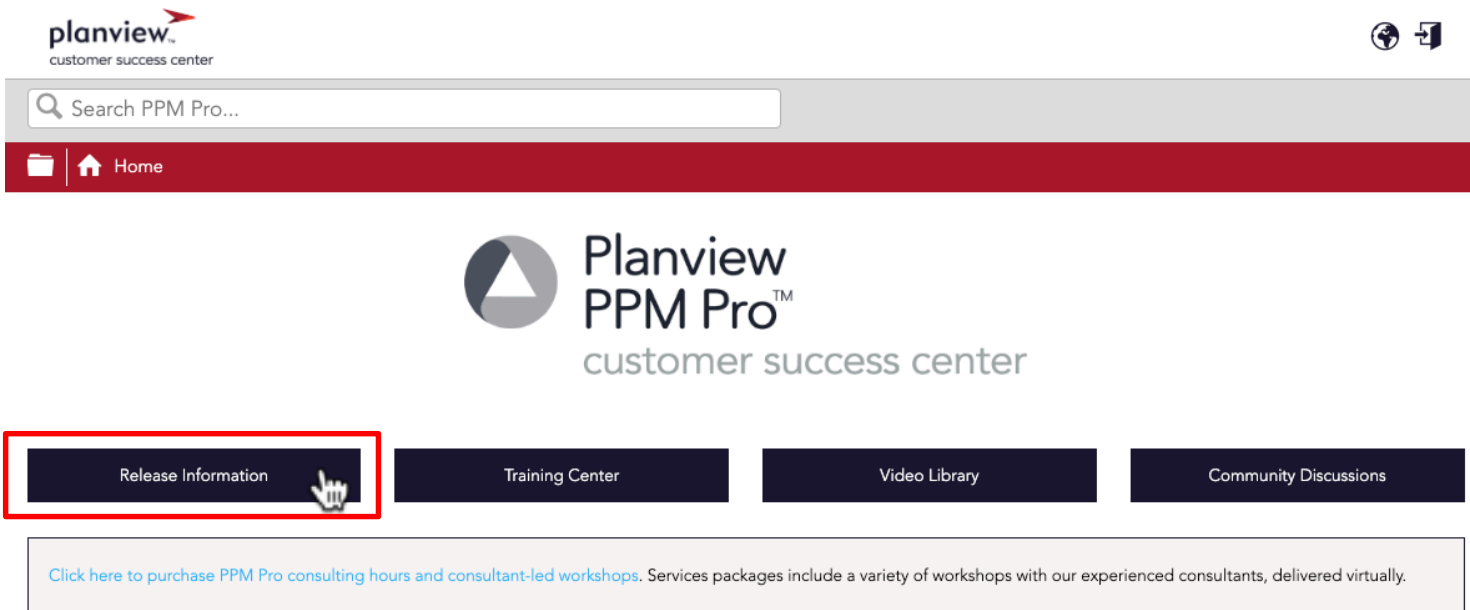
- Recording and slides will be shared

Today's Agenda

- Monthly Release Process and Sandboxes
- Newsflash: support for new browser
- Rolling Beta Features
- Enhancements
- Coming Soon
- Upcoming Webinars
- Q&A

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Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro

Monthly Release Schedule
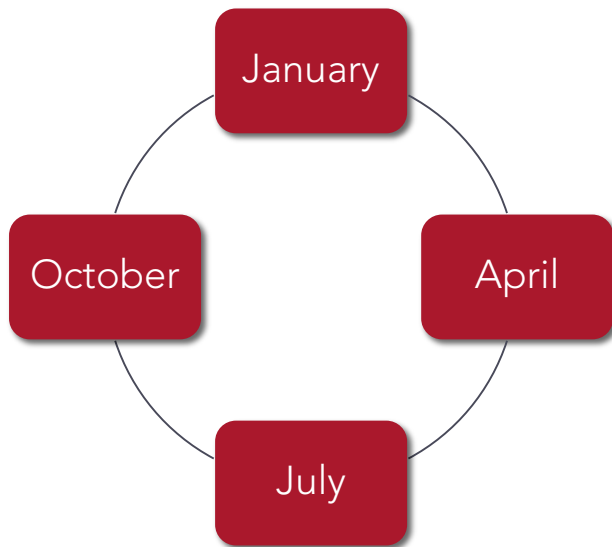
First Friday
- Release Notes Published

Second Friday
- Release deployed to sandbox environments

Third Friday
- Release deployed to production environments

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Features move from Beta to GA once a quarter

```
          January

October              April

           July
```

- 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.
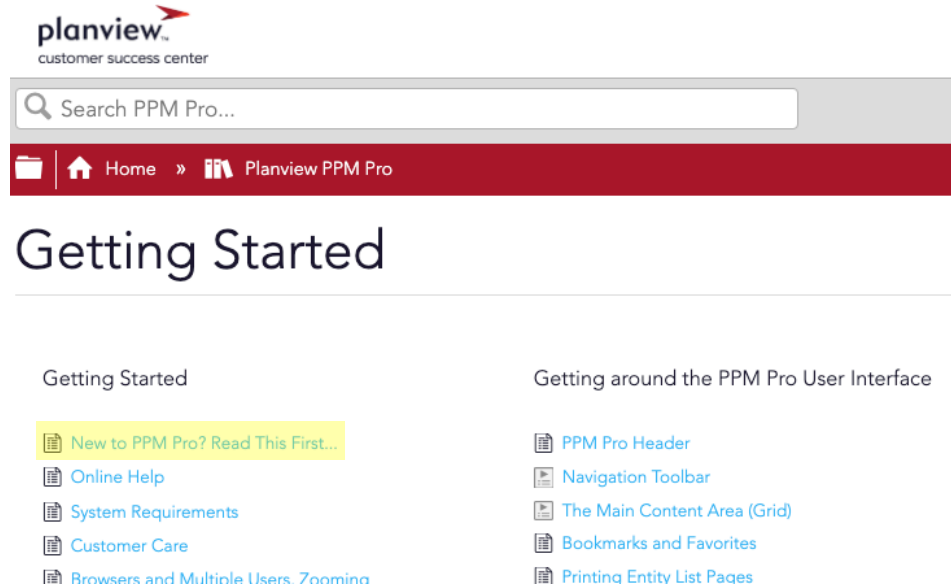
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Get early access to features in your sandbox

- 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

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New to PPM Pro?

https://success.planview.com/Planview_PPM_Pro/010_Getting_Started/010_Getting_Started/003_New_to_PPM_Pro

Newsflash

- Support for Chromium-based Microsoft Edge (Jan 15)
- In case you forget, we also support latest versions of Chrome and Firefox, as well as Internet Explorer 11
- Now you can migrate to a modern Microsoft browser!
- Better security and MS support
- No EOL date for Internet Explorer yet, but it will come ☺

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Current Month's Feature Status

Beta

Reports Revamp (rolling)

GA

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Reports Revamp – Rolling Beta
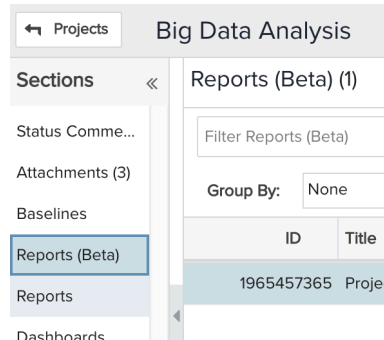
Current Beta Functionality

- New Reports grid with Group By
- Basic report topics and types, including new line, area, heat map, and spider charts
- New WYSIWYG report designer with:
  - Field search
  - Real-time preview of sample report output
  - Additional options for position, font, style, and size
- List report options changeable within preview
- Ability to optionally include filters at initial runtime and/or while viewing the report
- Ability to set multiple scopes for the report, optionally including the ability to change scope at initial runtime and/or while viewing the report

Future Releases

- List report:
  - Grouping and aggregations
  - Hierarchies and merging
  - Multi-column format
- Report drilldown
- Reports with time series data, portfolio project relationships, staffing/resource planning, and historical data (Audit, KPI)
- Gantt report type
- View references
- Export to PowerPoint
- Dashboards with WYSIWYG designer:
  - Reports and rich text/image content
  - Runtime and view filters
- Home and project Overview (dashboards)

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Reports Revamp

- Not *yet* available to be adopted into Production…target is February! When enabled in Production:
  - Permissions can hide Beta in top level navigation
  - But, Beta will show up at Entity levels due to shared permissions (for easier permissions transition)

Enhancement – Task Manual (Duration) % Complete

Duration in hours is used as the relative weight value

Coming Soon: Deprecate Legacy Requests

- Target Legacy Request Deprecation with June 2020 Release

June 2020

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

See new help topic: Stepping Into Work Intake and Requests Management (https://success.planview.com/Planview_PPM_Pro/Getting_the_Most_out_of_PPM_Pro/Strategies/022_Stepping_into_Work_Intake_

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Coming Soon: Changes to Calculated Fields

- Strict adherence to the data type setting on calculated fields

- **Why**: Better user experience in new reporting and customer security

- **What to do**: Review your calculated fields and make sure the data returned by the function matches the data type

- Targeted for February

If you have implemented your calculated fields correctly, there will be no impact!

Coming Soon: Multiple project log assignees

- Multiple users (including Time users) can be assigned to a project log, granted owner permissions

- **Why**: In response to customer requests and to prepare for phase 2 integrations with LeanKit and Projectplace

- **Impact to Legacy reports**:
  - Cannot display related information of the assignees, such as immediate supervisor or email address
  - Cannot drill down to related resource information for the assignees

- **Side benefit**: New filter operators (+6) for multi-select fields will be MUCH more robust

- **Targeted for February**

Filter criteria

Show Project Log ▼ where

any of the following are true ▼

Project Log: Assigned To ___ ▼

- is
- is not
- is empty
- is not empty
- contains
- contains any
- contains all
- contains none
- contains current user

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Planview Horizons 2020

Planview Horizons 2020 will be held October 20-22, 2020 at the La Cantera Resort & Spa in San Antonio, TX!

Registration opens in early February

- Super Early Bird through March 30 - $1,195
- Early Bird through June 12 - $1,395
- Discounted through September 19 - $1,595
- Regular through October 20 - $1,795

More details about the conference and how to register coming soon!

Upcoming PPM Pro Webinars

Registration links will be in February Release Notes:

- February Release Webinar – February 19
- Q1 2020 Roadmap – February 26

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Q&A

Thank You