



# PPM Pro Customer Webinar: July 2019 Release

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





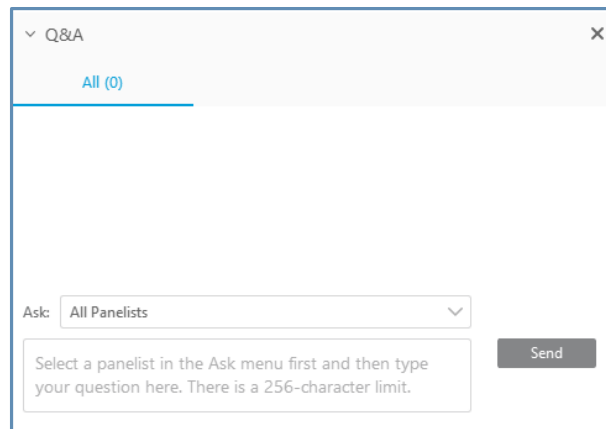
# PPM Pro Customer Webinar: July 2019 Release

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Sherrill Packebush, PPM Pro Product Manager  
Heather Pritchard, PPM Pro Managing Consultant  
Jon High, Integrations Product Manager



# 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 Q&A interface within a WebEx 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 header area with the text 'All (0)' in blue. The main area is a large white space for questions. At the bottom, there is a section labeled 'Ask:' with a dropdown menu currently set to 'All Panelists'. Below this 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.



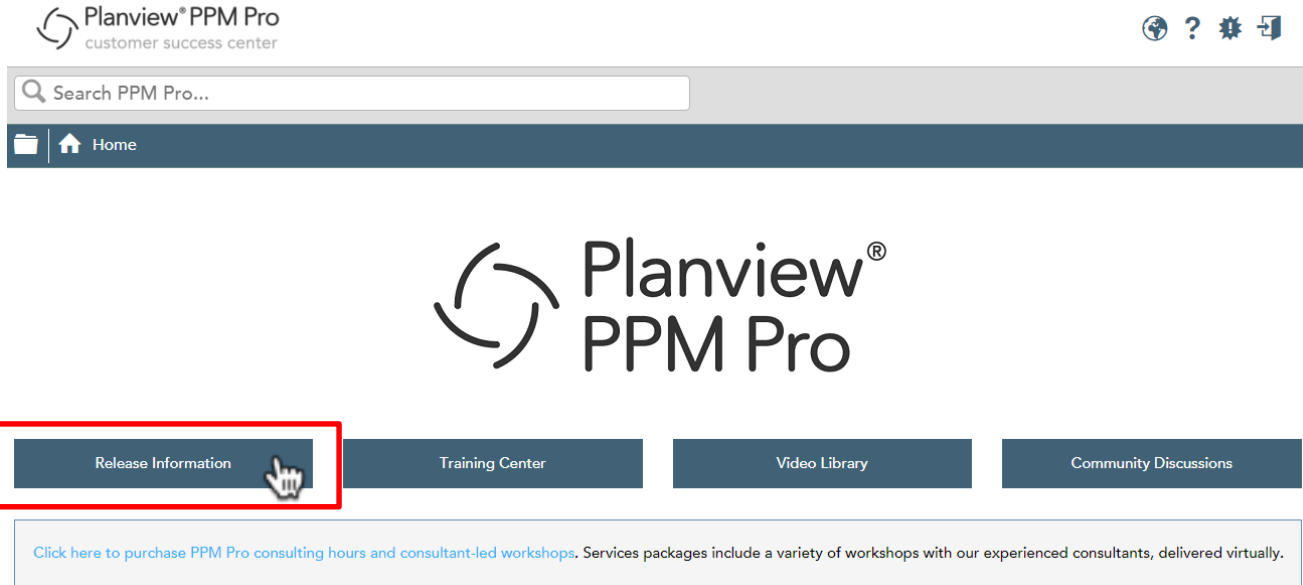
# Today's Agenda

- Monthly Release Process and Sandboxes
- Planview Horizons
- Rolling Beta features
- New Features
- Task-Level Expenses
- 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

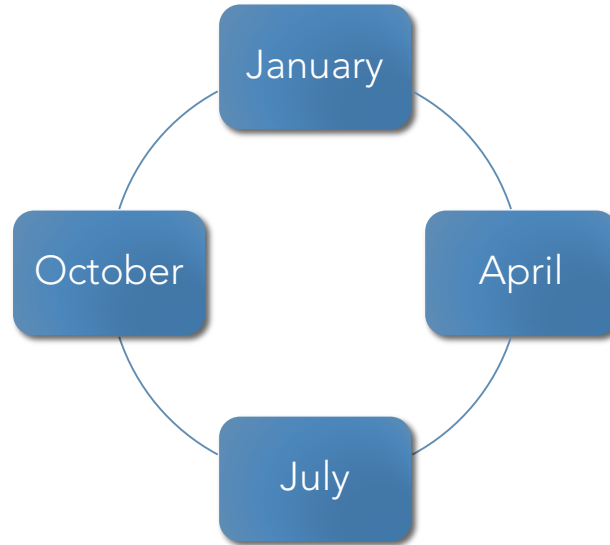
Second  
Friday

- 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.

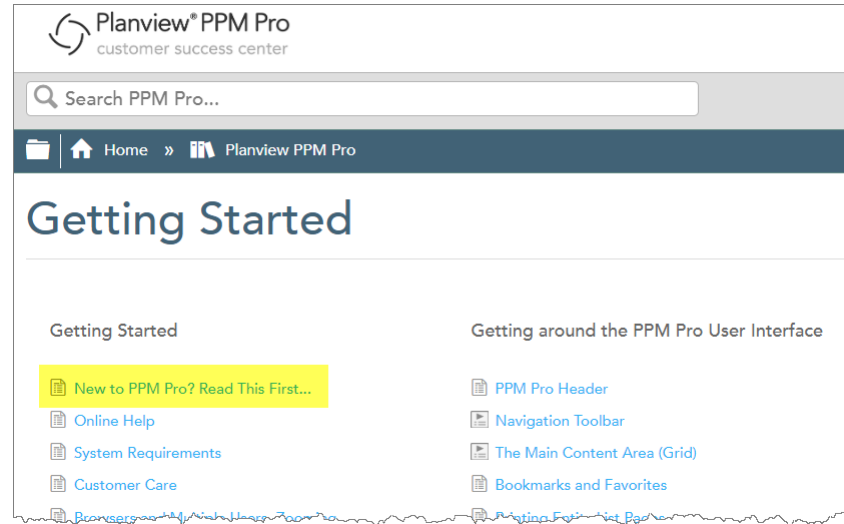
# Get early access to features in your sandbox

- 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*



# 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>



# 2020 PPM Pro Roadmap Spigit Challenge!

- Registered customers (webinars + inner circles) invited
- Challenge in 2 main customer phases:
  - Review current product backlog ideas + add others
  - Prioritize ideas
- August 7<sup>th</sup>-September 6<sup>th</sup>
- Challenge winners will be added to 2020 Roadmap

# Current Month's Feature Status



**Beta**

Requests Revamp (rolling)  
PPM Pro / LeanKit Integration (Beta)



**GA**

PPM Pro / Projectplace Integration

# PPM Pro – Projectplace Integration

## Planview's Integration Hub Platform

- Event-based integration model i.e. near real-time sync
- Improved performance, reliability, and stability
- Will have full product and customer care support

## Best Practices

- Sync and manage projects from PPM Pro
- Team Members manage and deliver on work in Projectplace

# PPM Pro – Projectplace Integration

## Things to Know

- Initial use case supported is **PPM Pro manages the WBS**
- Fully integrated templates
- Integration is now available for all customer Sandbox environments. Please submit a Customer Care ticket if you want it enabled
- Migration from current Production SnapLogic integration to new integration will be available in late August

# 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](https://success.planview.com/Planview_PPM_Pro/Release_Information/Announcements%2F%2FSupplemental_Product_Information/Announcements/Announcement%3A_PPM_Pro_Inner_Circles)

# Upcoming Webinars

- Product Release Webinar
  - August 14 – 10:30am CT
- Quarterly Roadmap Webinar
  - August 28 – 10:30am CT
- Reporting & Artifacts inner circle meetings
  - August 21 – 9am or 4pm CT



# Q&A

