



PPM Pro Customer Webinar: August 2019 Release

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





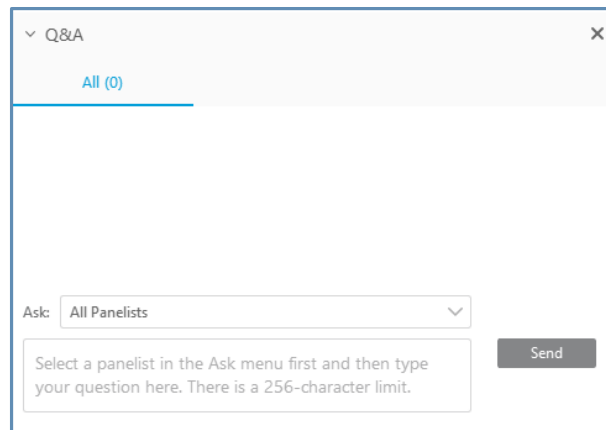
PPM Pro Customer Webinar: August 2019 Release

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



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 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 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
- Spigit 2020 Roadmap Challenge
- 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

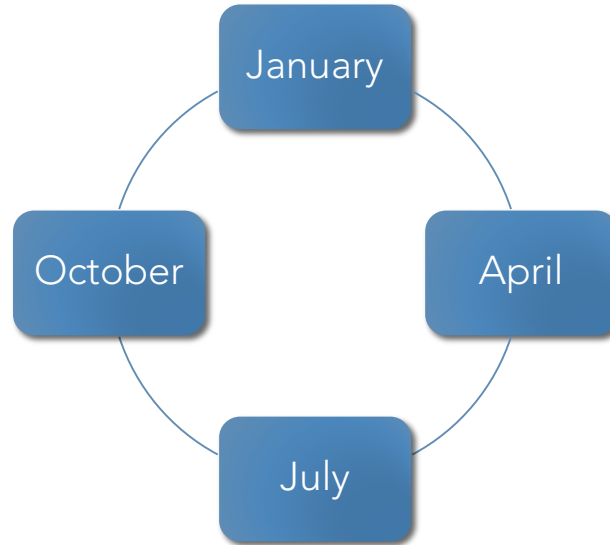
Second
Friday

- 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.

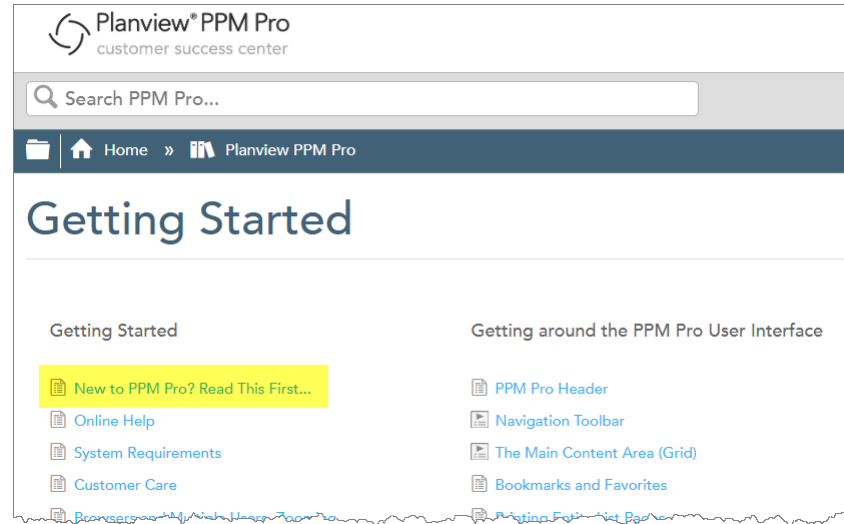
Get early access to features in your sandbox

- 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>

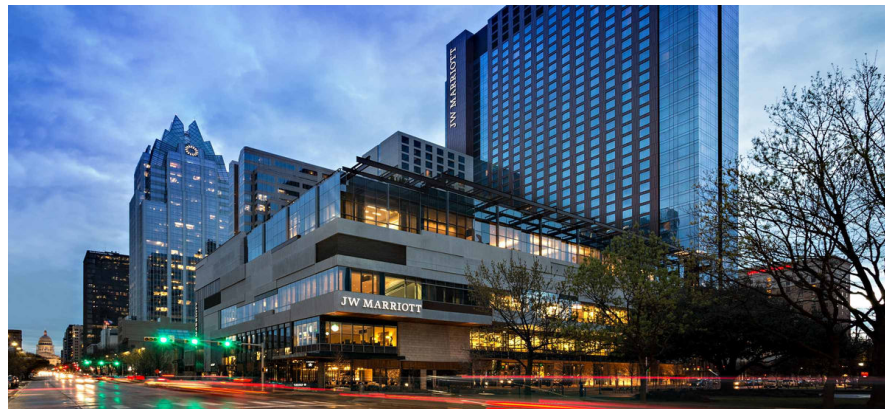


PPM Pro 2020 Roadmap Spigit Challenge

- Customer opportunity to drive 2020 Roadmap features
 1. Aug 7-16: Ideas and collaboration (Customers)
 - Review, add, rate, comment
 - Email productmanagement-ppmpro@planview.com to participate
 2. Aug 16-23: Expert Review (PPM Pro PM)
 - Remove duplicates, identify top rated features
 3. Aug 23-30: Prioritization (Customers)
 - Paired-comparison
 4. Aug 30-Sep 6: Roadmap Selection (PPM Pro PM + Dev)
 - Add winners to the 2020 Roadmap
- Results presented at Customer Sept Release Webinar

Planview Horizons User Conference 2019

- October 8-10, 2019
- Austin, TX
- Registration open! <https://horizons.planview.com>



Current Month's Feature Status



Beta

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



GA

PPM Pro / Projectplace Integration

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
- 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
- Multiple Approvers
- API – reveal on Admin/Web Services section

Future Releases

- Advanced gate logic
- Activity Log
- Copy Requests
- Data Import

Request Revamp – Rolling Beta

- Added user interface for WS API
 - Admin > Web Services API > Requests

Select		Insert		Update			
ID	Title/Label	Description	Field Type	Field Sub Type ID	Length	Search Criteria	
30703	Request: Assigned To	The current resource assigned to the request.	String	0	64		
30704	Request: Assigned To	The current resource assigned to the Request.	Number (Field Type 44)	94	64	✓	
30728	Request: Associated Entities	The list of entities associated to this Request.	String	0	0		
30734	Request: Associated Project Logs	The list of Project Logs associated to this Request.	String	0	0		
30730	Request: Associated Projects	The list of Projects associated to this Request.	String	0	0		
30732	Request: Associated	The list of Tasks associated to this Request.	String	0	0		

Request Revamp – Rolling Beta

- Many issue fixes and improvements from customer feedback
- General Availability (GA) Target of Q4

Home » Planview PPM Pro » New Features and Release Notes		
Requests - New	877777108	Improved. Per feedback from customers, users always expect the Save button on the bottom right and sometimes accidentally click Submit when they only wanted to Save. Now the modal will show "Save", "Save & Submit" and "Close" (non-gated) or "Save", "Save & Approve", "Other Actions" and "Close" (gated).
Requests - New	877784251	Fixed. A submission confirmation dialog displays both after saving the request and then clicking Submit, or after clicking Submit directly (Save happens automatically). Previously the dialog appeared only if you saved the request first, then submitted.
Requests - New	877784760	Improved. When filtering with the Current Gate field, the list of gates that appears are prefixed with the name of the category the gate belongs to (category name > gate name). Since gate names do not need to be unique across categories, this prefix allows users to distinguish which category/gate they want to filter by.
Requests - New	877787113	Improved. Updated the message text in the alert sent to the requester after an approval to clarify that an approval happened, but the request is not necessarily fully approved. New text is: Subject: Request received an approval at <gate title> Body text: "The request below has received an approval at the <gate title> gate by <approver>. Note that additional approvals at this gate may still be needed before the request leaves this gate."

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

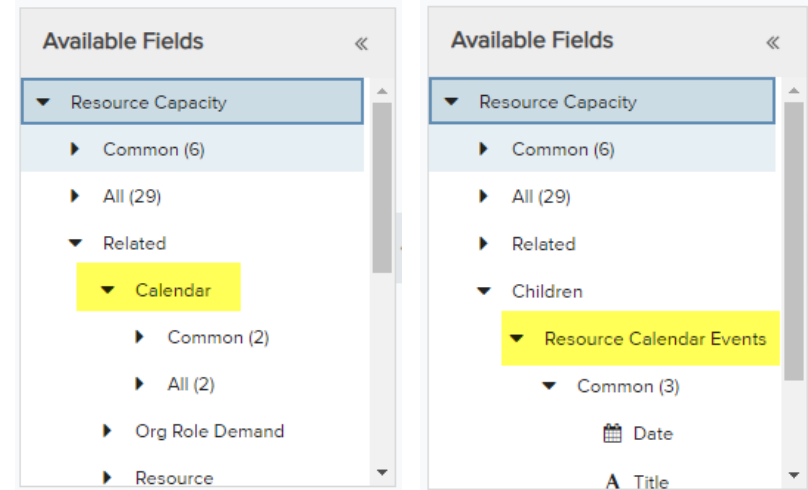
PPM Pro – Projectplace Integration

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

PPM Pro Enhancements

- Ability to report on events from a resource's calendar
- Found on Resource Planning by Resources report source
- Two new folders
 - Related/Calendar
 - Children/Resource Calendar Events



Example Calendar Events Report

Report: Calendar Events for Frank True

fttrue-q1.innotas.io/tt.jsp.pageband.reports.OutputStatusPanelBand.pa?x=1565800298951&threadId=1000016...

Report: Calendar Events for Frank True

Calendar Events for Frank True

Resource: Name: Last, First	Calendar: Title	Resource Capacity: Date	Resource Calendar Events: Date	Resource Calendar Events: Title	Resource Calendar Events: Type
True, Frank	Canada Calendar	11/1/2018			
			11/12/2018	New Event	Jury Duty
True, Frank	Canada Calendar	12/1/2018			
			12/25/2018	Christmas	Holiday
			12/26/2018	Boxing Day	Holiday
True, Frank	Canada Calendar	1/1/2019			
			1/1/2019	New Year's Day	Holiday
			1/16/2019	Lamar	Working Day
True, Frank	Canada Calendar	2/1/2019			
			2/18/2019	Ski week	Vacation
			2/19/2019	Ski week	Vacation
			2/20/2019	Ski week	Vacation
			2/21/2019	Ski week	Vacation

Task-Level Expenses Deprecation

- Oct 2019 release
- “New” button will go away for both task estimates and expenses
- 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>

Upcoming Webinars

- Reporting & Artifacts inner circle meetings
 - August 21 – 9am or 4pm CT
- Quarterly Roadmap Webinar
 - August 28 – 10:30am CT
- September Product Release Webinar
 - September 18 – 10:30am CT



Q&A

