PPM Pro Customer Webinar: August 2019 Release

Thanks for joining! We'll start 1 minute after the bottom of the hour.
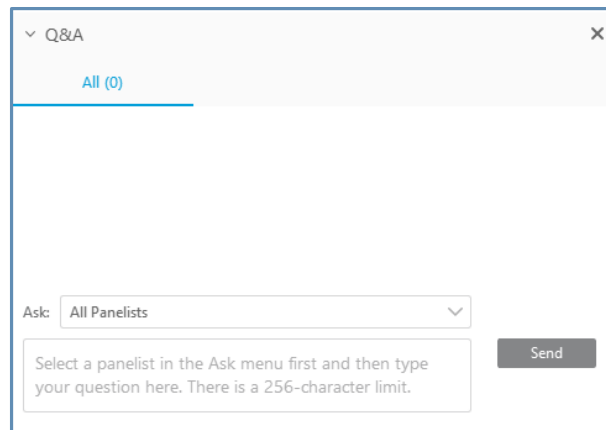
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PPM Pro Customer Webinar: August 2019 Release

Jennifer Rose, PPM Pro Product Manager
Sherrill Packebush, PPM Pro Product Manager
Heather Pritchard, PPM Pro Managing Consultant

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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

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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

Monthly Release Schedule

First Friday
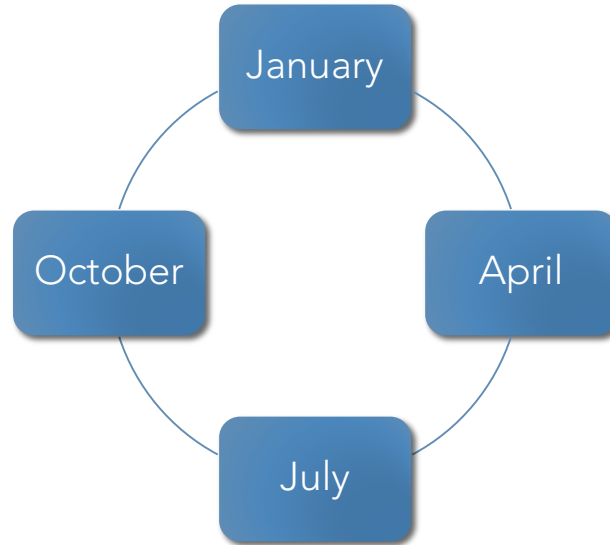- Release Notes Published

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

April

July

October

- 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.
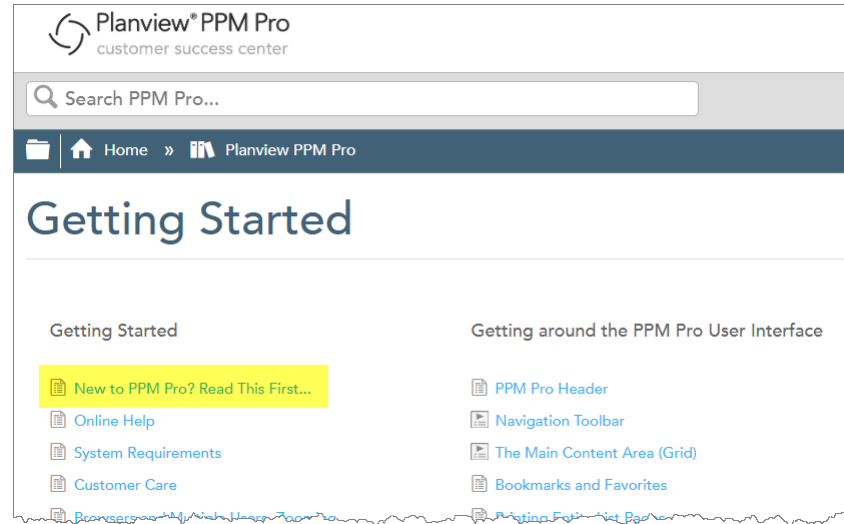
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Get early access to features in your sandbox

- 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

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

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Planview Horizons User Conference 2019

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

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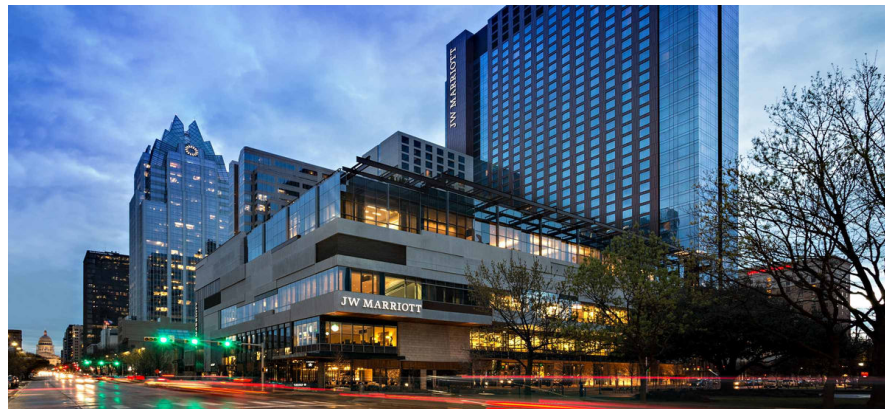
Current Month's Feature Status

Beta

Requests Revamp (rolling)

PPM Pro / LeanKit Integration (Beta)

GA

PPM Pro / Projectplace Integration

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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

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Request Revamp – Rolling Beta

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

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Request Revamp – Rolling Beta

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

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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

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PPM Pro – Projectplace Integration

- 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

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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

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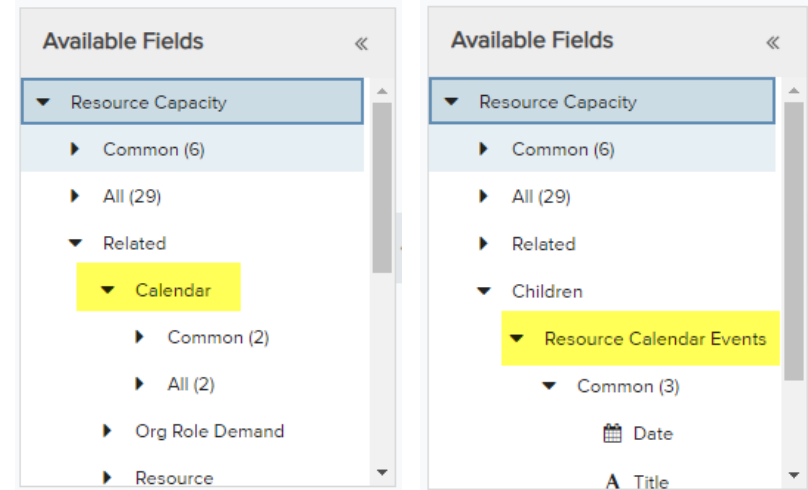
Example Calendar Events Report

Report: Calendar Events for Frank True

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

Report: Calendar Events for Frank True   Actions ▼   ❓

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

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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_Docu
  mentation/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

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Q&A

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