



PPM Pro Customer Webinar: February 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 bottom right of the Zoom window
- Webinar is being recorded
- Recording and slides will be shared



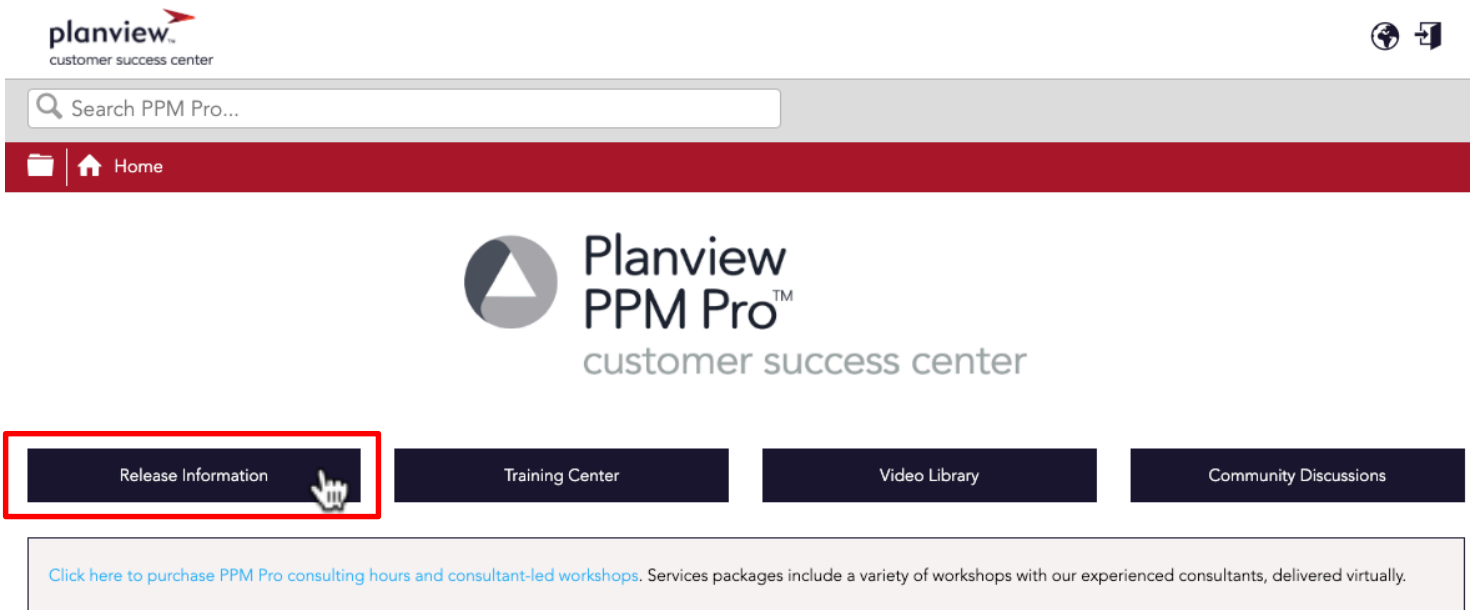
Today's Agenda

- Monthly Release Process and Sandboxes
- Rolling Beta Features
- Enhancements
- Coming Soon
- Upcoming Webinars
- Q&A



Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro



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Search PPM Pro...

Home

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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

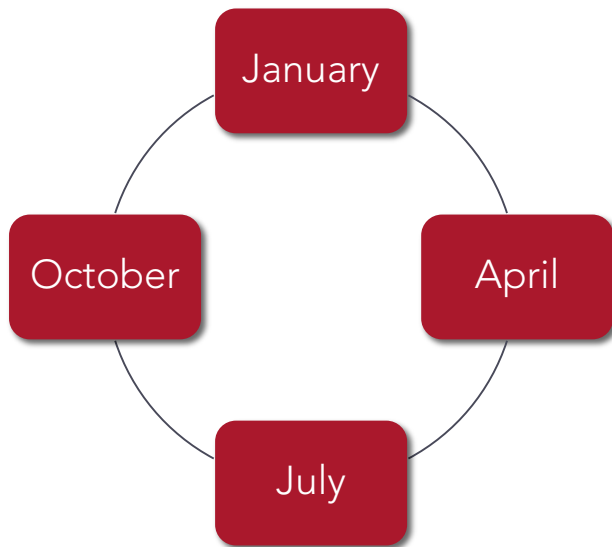
Second
Friday

- 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.

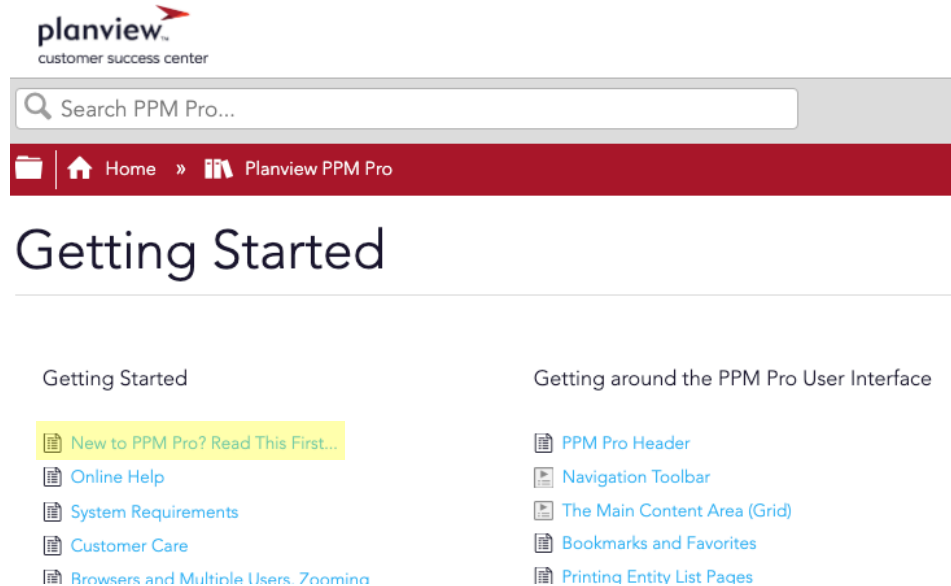
Get early access to features in your sandbox

- 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?



The screenshot shows the Planview customer success center interface. At the top is the Planview logo with the tagline 'customer success center'. Below it is a search bar labeled 'Search PPM Pro...'. A red navigation bar contains a home icon, the text 'Home', a double arrow icon, and 'Planview PPM Pro'. The main heading is 'Getting Started'. Below this, there are two columns of links. The left column is titled 'Getting Started' and includes links for 'New to PPM Pro? Read This First...', 'Online Help', 'System Requirements', 'Customer Care', and 'Browsers and Multiple Users, Zooming'. The right column is titled 'Getting around the PPM Pro User Interface' and includes links for 'PPM Pro Header', 'Navigation Toolbar', 'The Main Content Area (Grid)', 'Bookmarks and Favorites', and 'Printing Entity List Pages'.

planview
customer success center

Search PPM Pro...

Home » Planview PPM Pro

Getting Started

Getting Started

- New to PPM Pro? Read This First...
- Online Help
- System Requirements
- Customer Care
- Browsers and Multiple Users, Zooming

Getting around the PPM Pro User Interface

- PPM Pro Header
- Navigation Toolbar
- The Main Content Area (Grid)
- Bookmarks and Favorites
- Printing Entity List Pages

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

Current Month's Feature Status



Reports Revamp (rolling)



Reports Revamp – Rolling Beta

Current Beta Functionality

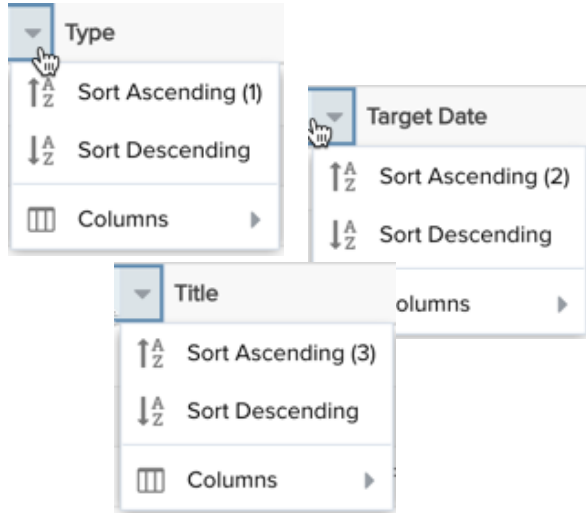
- Usability enhancements
- New Reports grid with Group By
- Basic report topics and types, including new line, area, heat map, and spider charts
- New WYSIWYG report designer with:
 - Field search
 - Real-time preview of sample report output
 - Additional options for position, font, style, and size
-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

Future Releases

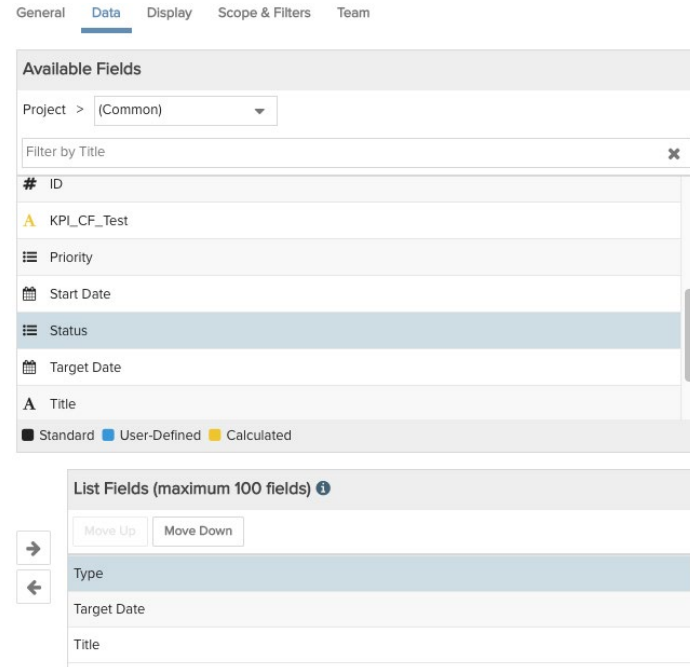
- List report:
 - Grouping and aggregations
 - Hierarchies and merging
 - Multi-column format
- Report drilldown
- Reports with time series data, portfolio project relationships, staffing/resource planning, and historical data (Audit, KPI)
- Gantt report type
- View references
- Export to PowerPoint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

Reports Usability Enhancements

- Column sort indicator



- Double-click to add/remove fields

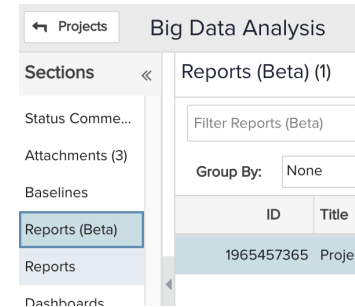
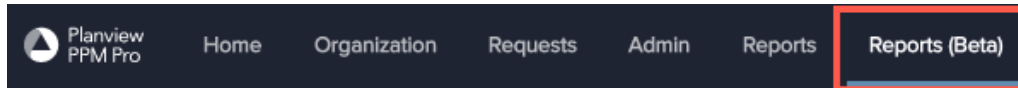


Reports Revamp

- Available to be adopted into Production 😊
- Reminders:
 - Beta software
 - Bug fix priority at development's discretion
 - Every effort made to make releases backwards compatible, but might have to redo some work (hopefully not)

Reports Revamp

- Be aware:
 - Permissions can hide Beta in top-level navigation...but will show up at entity levels due to shared permissions (for easier permissions transition)



- Permissioning around Time reports is not complete -> be careful who has permission to view Time reports

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

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

Calculated Field : Project Field-20191105

Basic Details Formula Editor

Entity:
Project

Title: *
Project Field-20191105

Data Type:
String
Boolean
Date
Date Time
Float
Integer

Enhancement: 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

Filter criteria

Show where

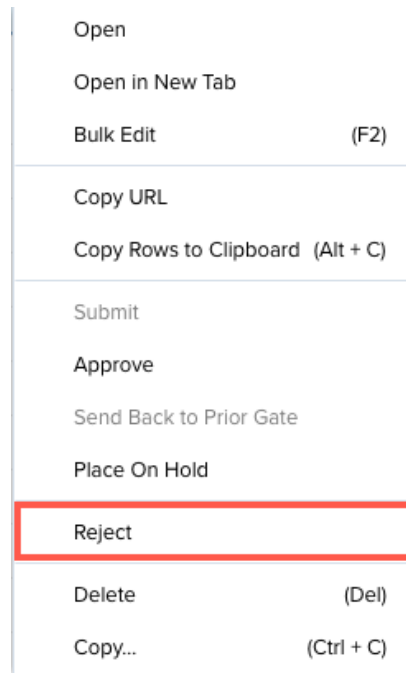
[any](#) of the following are true (▼)

[Project Log: Assigned To](#) (▼)

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

Enhancements: Misc Request Tweaks

- Repositioned Reject item on Action/right-click menu
- Strengthened confirmation message for Reject Action
- Maximize/Minimize control on modal dialogs



Enhancement: Access to current WS API Javadoc

- Always up-to-date

The screenshot displays the Planview PPM Pro Admin interface. The top navigation bar includes links for Home, Organization, Requests, Admin, Reports, Reports (Beta), and Dashboard. The left sidebar lists various sections, with 'Web Services API' highlighted. The main content area is titled 'WS Integration: Entities & Fields Supported (31)' and contains buttons for 'View Fields', 'View API Documentation', and 'Download API Documentation'. A red arrow points from the 'View API Documentation' button to a separate window showing the 'PPMPro Web Services API' Javadoc. This window includes tabs for Overview, Package, Class, Tree, Deprecated, Index, and Help. The 'Overview' tab is active, displaying the title 'PPMPro Web Services API', a description, and a table of packages. The table has two columns: 'Package' and 'Description'. The packages listed are 'services' and 'services.objects'. Below the table, there is a 'Getting Started' section with introductory text.

Planview PPM Pro

Home Organization Requests Admin Reports Reports (Beta) Dashboard

Sections

- Organization
- Permission Profiles
- Users
- Groups
- Setup
- Publishing
- Scheduled Jobs
- Data Import
- IP Ranges
- Web Services API

WS Integration: Entities & Fields Supported (31)

View Fields View API Documentation Download API Documentation

Type Entity Type ID

Allocated Roles 54

Asset Categories

Asset Classes

Assets

Billing Rates

Departments

Divisions

Financial Entries

OVERVIEW PACKAGE CLASS TREE DEPRECATED INDEX HELP

PREV NEXT FRAMES NO FRAMES

PPMPro Web Services API

This is the reference documentation for the PPMPro Web Services API.

See: Description

Packages

Package	Description
services	
services.objects	

This is the reference documentation for the PPMPro Web Services API.

Getting Started

The main entry point is `TTBusObjService`.

The `services.objects` package describes the objects returned from `TTBusObjService` methods.

OVERVIEW PACKAGE CLASS TREE DEPRECATED INDEX HELP

PREV NEXT FRAMES NO FRAMES

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 updated help topic: **Transitioning from Legacy to New Requests**

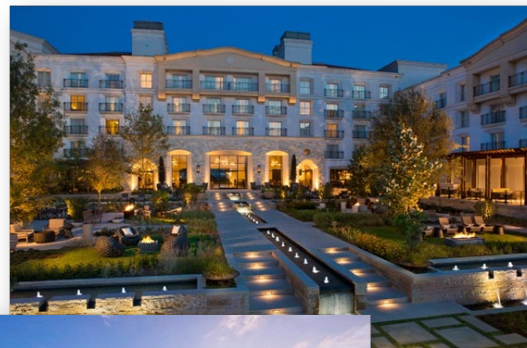
<https://success.planview.com/Planview PPM Pro/150 PPM Pro Administrator Documentation/070 Setting Up Entities/Requests/005 Transitioning from Legacy to New Requests>

Planview Horizons 2020

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

Registration and call for presenters now open planviewhorizons.com

- 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



Upcoming Webinars/Events

- Q1 2020 Roadmap February 26
- March Release Webinar March 18
- Register for all webinars in advance!
- <https://success.planview.com/Planview PPM Pro/Release Information/Customer Webinars>

RELEASE INFORMATION

Planview PPM Pro Customer Webinars

Page restriction: Public

2020

1/15/2020: January Release | [Q&A Transcript](#) | [View](#) [PDF](#) | [View Presentation](#)

2/19/2020: February Release | [Register](#)

2/26/2020: Q1 Roadmap | [Register](#)

3/18/2020: March Release | [Register](#)

4/15/2020: April Release | [Register](#)

5/20/2020: May Release | [Register](#)

5/27/2020: Q2 Roadmap | [Register](#)

6/17/2020: June Release | [Register](#)

7/15/2020: July Release | [Register](#)

8/19/2020: August Release | [Register](#)

8/26/2020: Q3 Roadmap | [Register](#)

9/16/2020: September Release | [Register](#)

10/14/2020: October Release | [Register](#)

11/18/2020: November Release | [Register](#)



Q&A



Thank You