

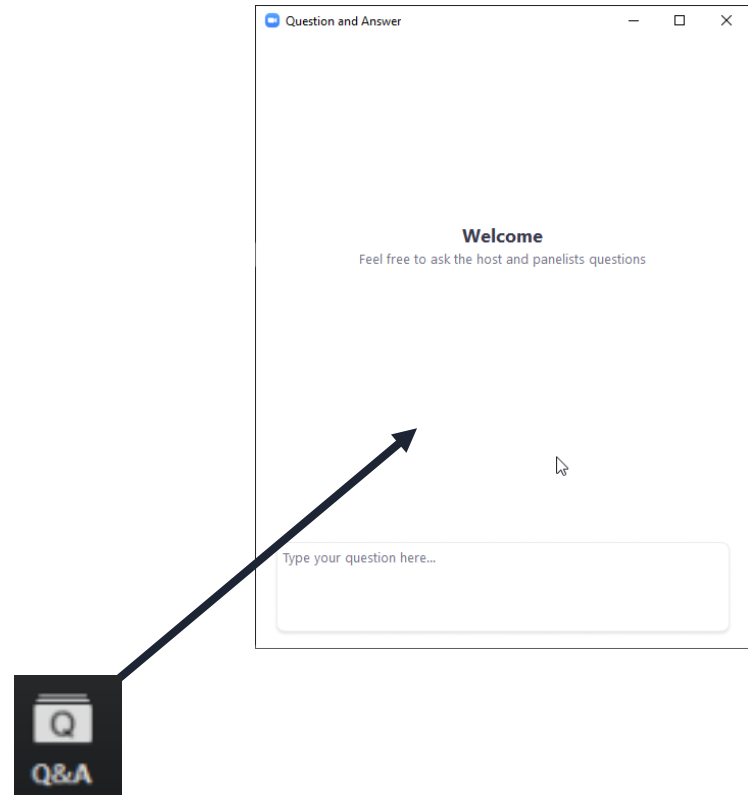


PPM Pro Customer Webinar: March 2020 Release

Jennifer Rose, PPM Pro Product Manager
Sherrill Packebush, Sr PPM Pro Product Manager
Cetiera Carmona, Customer Marketing Manager (Moderator)

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



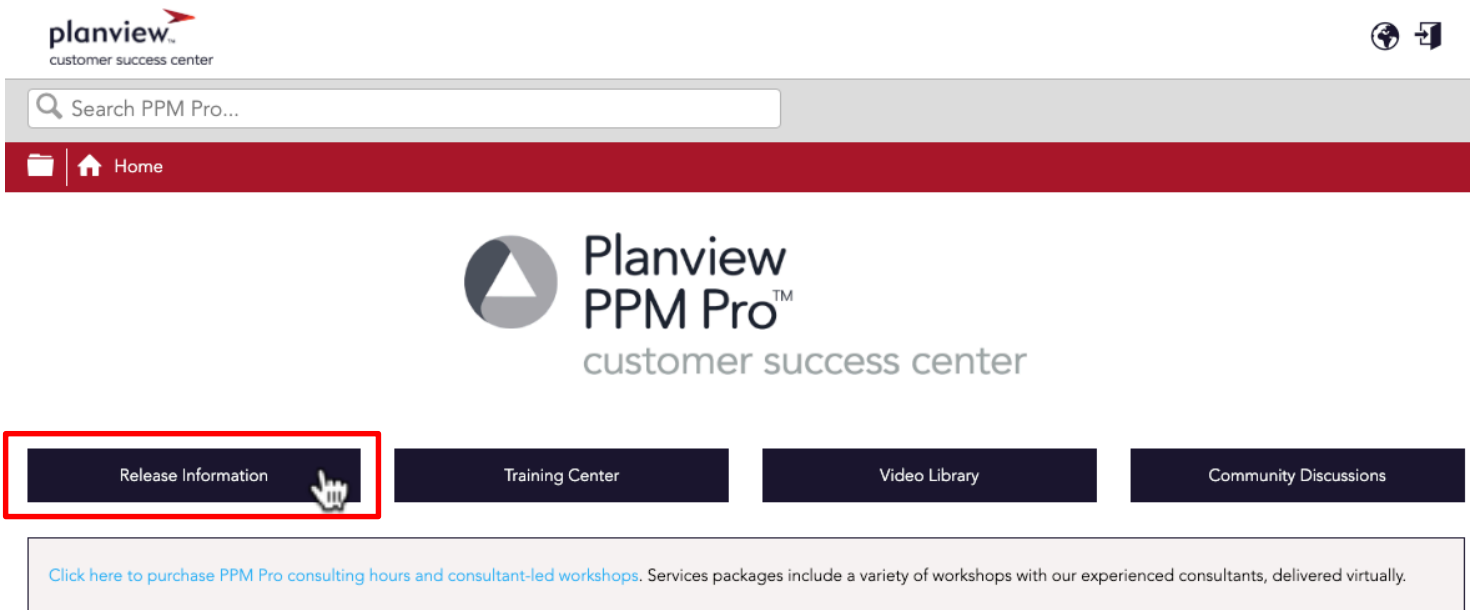
Today's Agenda

- Monthly Release Process and Sandboxes
- Rolling Beta Features
- Enhancements
- 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...

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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

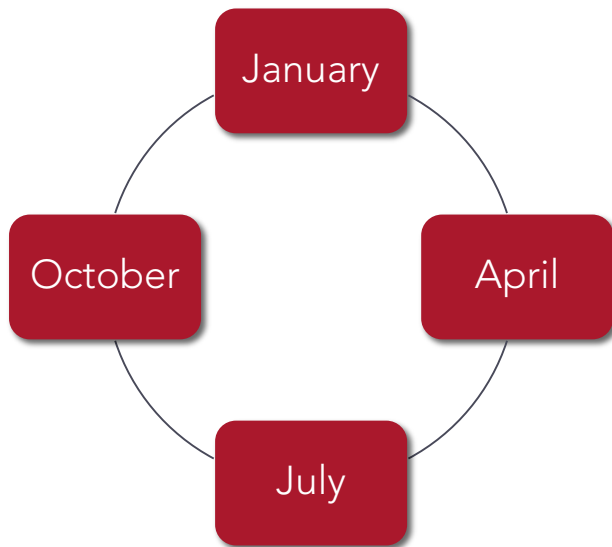
Second
Friday

- 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.

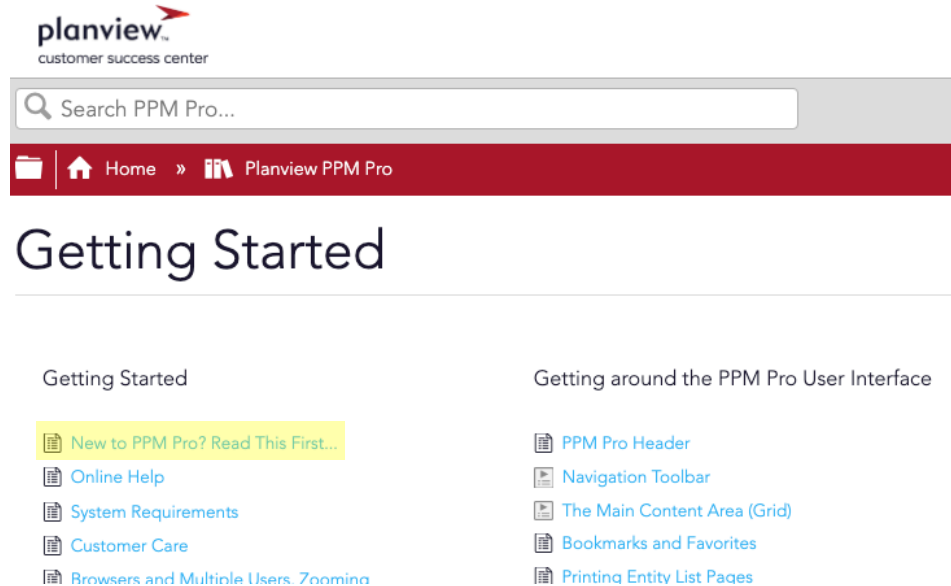
Get early access to features in your sandbox

- 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
- 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
- Ability to report on indirectly-related data
- Date and number formats
- Hierarchical column sorting

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)

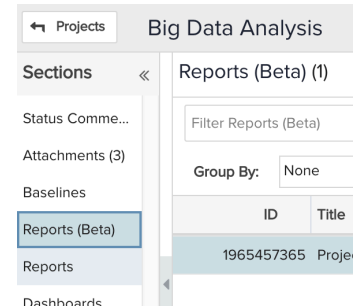
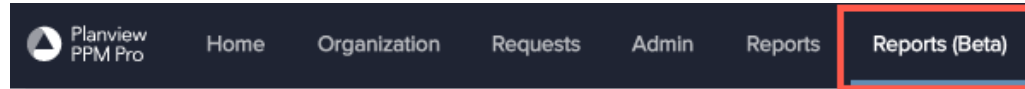
Reports Revamp

- Available to be adopted into Production 😊
- New reporting demo recording!
- 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)

RELEASE INFORMATION		
New Features and Release Notes		
Page restriction: Public		
New Feature Matrix and Release Notes	Highlights	Links to Webinar Registration/Recordings
	March 2020 Reports (Beta) updates: <ul style="list-style-type: none">Report on indirectly-related dataSorting in hierarchical reportsDate and number formatsNew demo of features available as of March release	March 18th Product Release webinar - register here! Demo Intro to Reporting Beta features as of March release

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)



Enhancement – Time User/Request Approval

Can approve requests when correctly permissioned
(derived or explicit approver)

The screenshot displays the Planview PPM Pro interface. The top navigation bar includes 'Home', 'Requests', and 'Reports'. The left sidebar shows 'Sections' with options like 'Timesheets', 'Expenses', 'Requests', 'Project Log', and 'Tasks'. The main area is titled 'My Requests (9)' and contains a table of requests. A red box highlights the user 'Tim Madewell' in the top right corner, and another red box highlights the name 'Madewell, Tim' in the 'Pending Approvers' column of a request row.

Title	ID	Requester	Pending Approvers	Category	Last Modified By
! Test Task Date UDF Map...	1964996...	Geld, Anthony		Small Request	Geld, Anthony
Bonus Pie	19611278...	Barnes, JD		Innovation Idea	Geld, Anthony
Customer fun	1965515...	Geld, Anthony	Madewell, Tim	Innovation Idea	Geld, Anthony
Demo Idea	1962378...	Geld, Anthony		Innovation Idea	Geld, Anthony
Fix the stuff	1963559...	Geld, Anthony		Small Request	Geld, Anthony
test	1965314...	Geld, Anthony		Really Small Requ...	Geld, Anthony
test for Jennifer	24117781...	Geld, Anthony	Medeiros, Kristyn	Really Small Requ...	Geld, Anthony
test for Joe	1965169...	Geld, Anthony		Innovation Idea	Geld, Anthony
Test for URL	240922...	Geld, Anthony	Geld, Anthony	Small Request	Geld, Anthony

Enhancement – New Locale Control

Admin/Organization/Default Locale

The screenshot displays the Planview PPM Pro Admin interface. The top navigation bar includes links for Home, Organization, Requests, Admin (highlighted), Reports, Reports (Beta), and Projects. On the left, a 'Sections' sidebar lists various settings: Organization (expanded), Info (selected), Hierarchy, Role Groups, Roles, Resource Settings, Timesheet Settings, and Routing. The main content area is titled 'Organization Info: Famous Frames (fttrue@documentation/in)'. It features a 'Localization Settings' section with the following configuration:

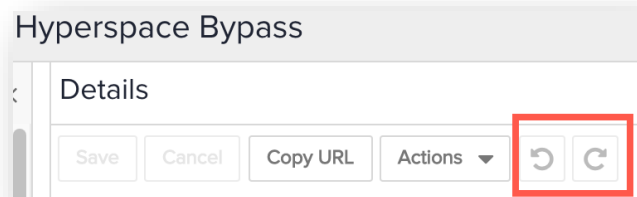
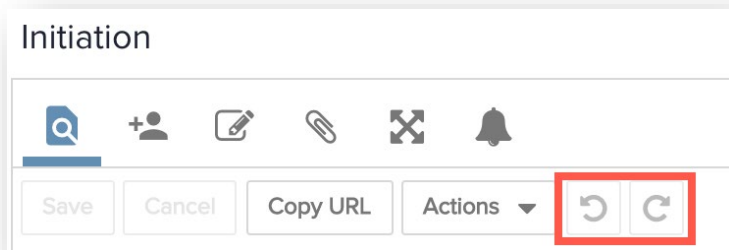
Localization Settings	
Locale	US
Default Locale *	English/United States
Default Time Zone *	America/Los_Angeles
Currency	US Dollar USD

The 'Default Locale' field is highlighted with a red rectangle. Above the settings, there are buttons for 'Save', 'Cancel', and two circular arrows for refreshing or undoing.

Coming Soon: Details Undo/Redo

Undo/Redo for all SSA entity Details panels/sections:

- project Details, Additional Details, Settings
- all tabbed Details, such as task and portfolio Details
- tabbed areas in Admin, such as User Details
- modals such as Bulk Editor and New Request



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**

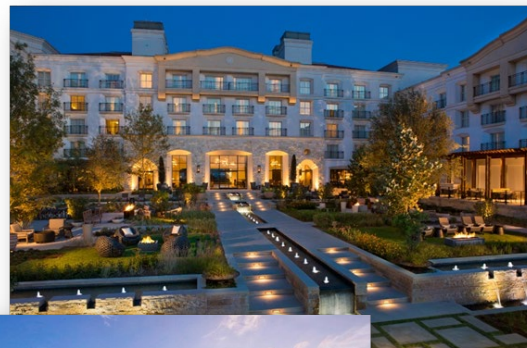
<https://success.planview.com/Planview PPM Pro/150 PPM Pro Administrator Documentation/070 Setting Up Entities/Requests/005 Transitioning from Legacy to New Requests>

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 **May 31**: \$1,195
- Early Bird through June 12: \$1,395
- Discounted through September 19: \$1,595
- Regular through October 20: \$1,795



Current Disruption – How can we Help?

- Customer Success Center (success.planview.com)
 - Stepping into Resource Management
 - Analyzing Capacity and Demand
 - What If and Predictive Portfolio Analysis (PPA)
 - Stepping into Work Intake and Requests Management
 - Managing the Work Intake process (new unplanned work)
 - Prioritization and Scoring
 - Project and Portfolio topics such as replanning
- Please reach out to us, more to come

Upcoming Webinars/Events

- Q2 2020 Roadmap May 27
- April Release Webinar April 15
- 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