

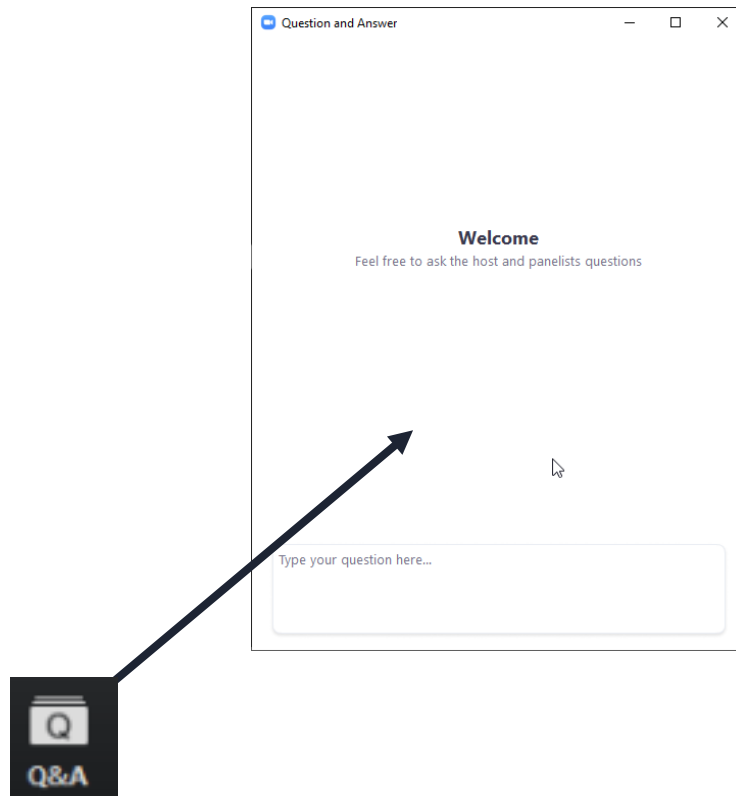


# PPM Pro Customer Webinar: April 2020 Release

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



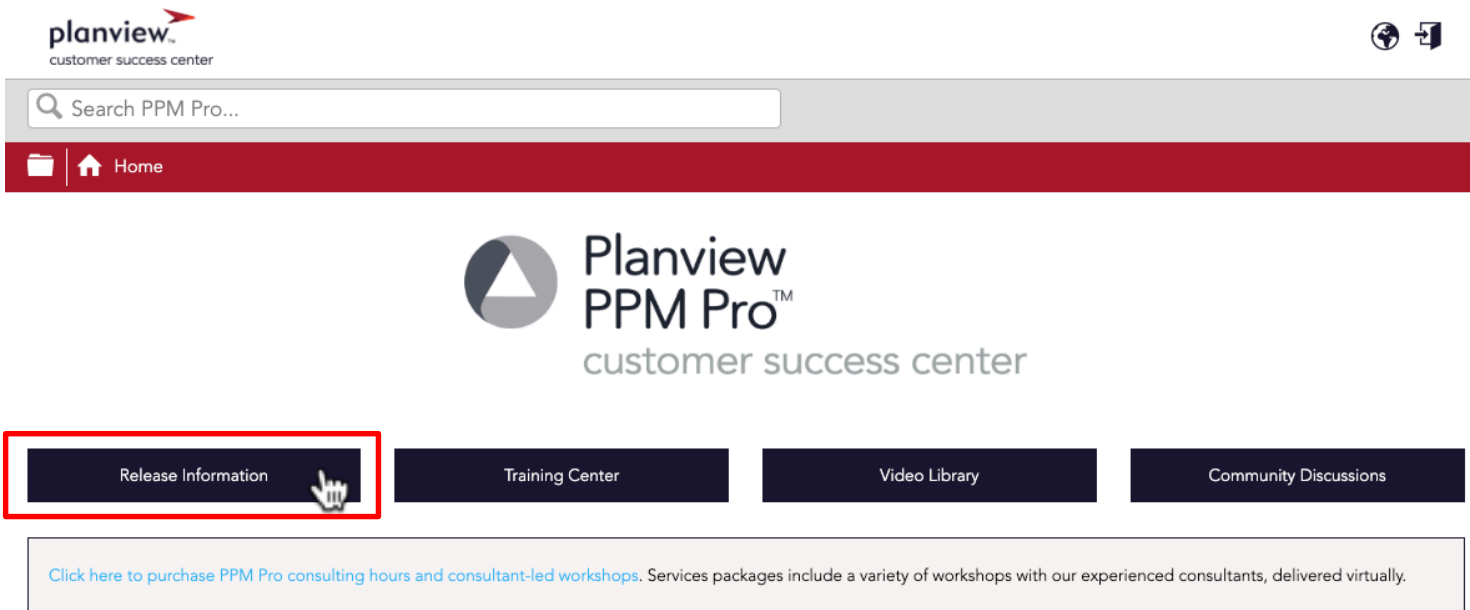
# Today's Agenda

- 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](https://success.planview.com/Planview_PPM_Pro)



# Monthly Release Schedule

First  
Friday

- Release Notes Published

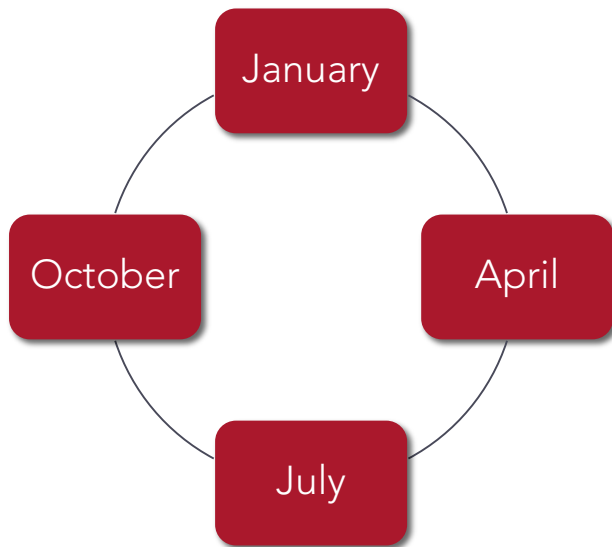
Second  
Friday

- Release deployed to sandbox environments

Third  
Friday

- Release deployed to production environments

# 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.

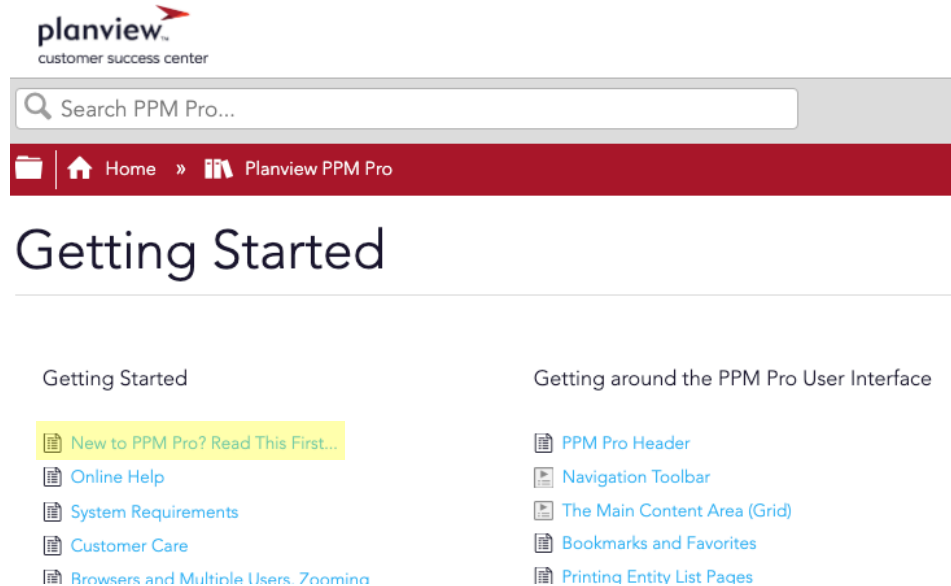
# Get early access to features in your sandbox

- 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 and a search bar. Below is a red navigation bar with 'Home' and 'Planview PPM Pro' links. The main heading is 'Getting Started'. Under this heading, there are two columns of links. The first column, 'Getting Started', includes links for 'New to PPM Pro? Read This First...', 'Online Help', 'System Requirements', 'Customer Care', and 'Browsers and Multiple Users, Zooming'. The second column, 'Getting around the PPM Pro User Interface', 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

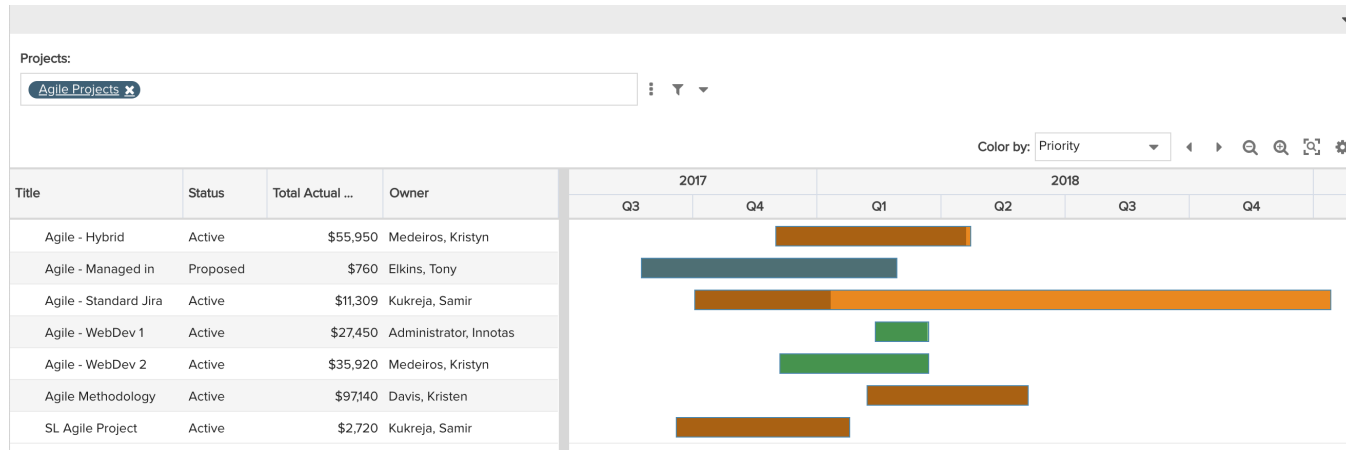
- Usability enhancements
- New Reports grid with Group By
- Basic report topics and types, including new line, area, heat map, and spider charts
- New WYSIWYG report designer
- List report options changeable within preview
- Ability to include filters at initial runtime and/or while viewing the report
- Ability to set multiple scopes for the report
- Ability to report on indirectly-related data
- Date and number formats
- Hierarchical column sorting
- Gantt report type

## 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)
- 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 – Gantt Type

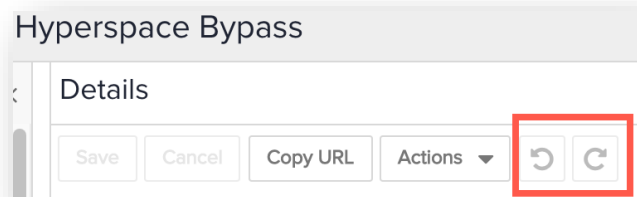
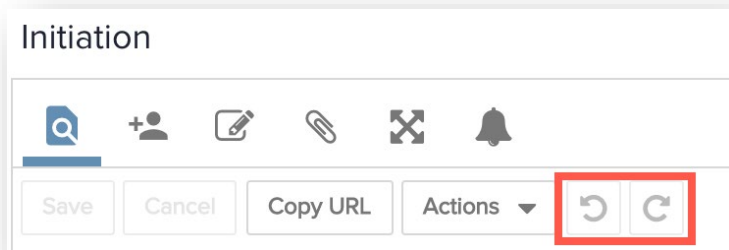
- Similar to Legacy Gantt, couple of capabilities still to add
- New List options, except no Wrapping
- New Scope and Filter options



# Enhancement – Undo/Redo

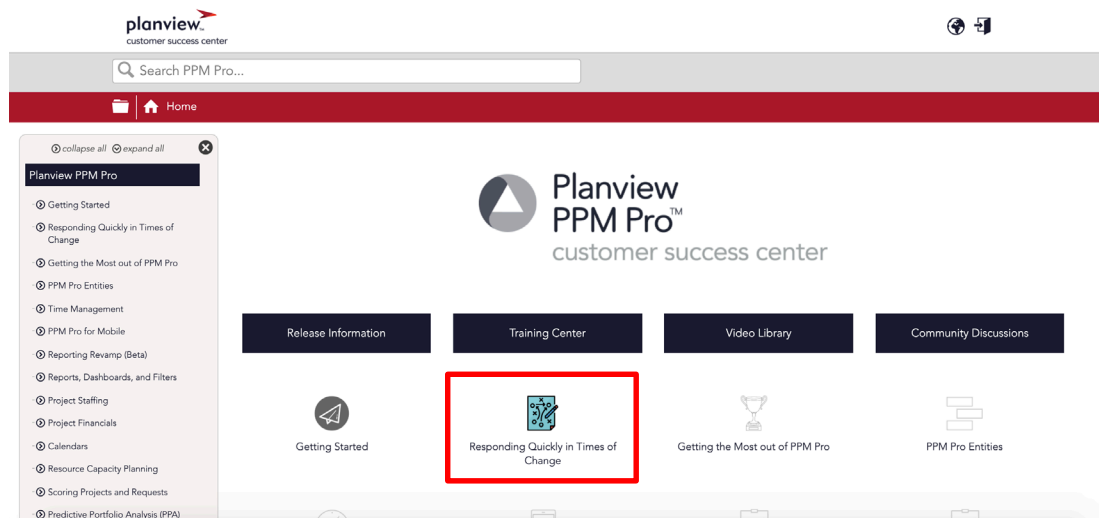
Undo/Redo for all SSA entity Details panels/sections:

- 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



# Responding Quickly in Times of Change

- New Customer Success Center [video series/content](#)
- New [inner circle](#) [https://info.planview.com/Tactics-to-Respond-Quickly-\\_user-group\\_prm\\_en\\_reg.html](https://info.planview.com/Tactics-to-Respond-Quickly-_user-group_prm_en_reg.html)



# 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>

# Upcoming Webinars/Events

- May Release Webinar May 13
- Q2 2020 Roadmap May 27
- Register for all webinars in advance!
- <https://success.planview.com/Planview PPM Pro/Release Information/Customer Webinars>

RELEASE INFORMATION

## Planview PPM Pro Customer Webinars

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### **2020**

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

**2/19/2020:** February Release | [Q&A Transcript](#) |  [View PDF](#) |  [View Presentation](#)

**2/26/2020:** Q1 Roadmap | [Q&A Transcript](#) |  [View Presentation](#)

**3/18/2020:** March Release | [Q&A Transcript](#) |  [View PDF](#) |  [View Presentation](#)

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

**5/13/2020:** 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