

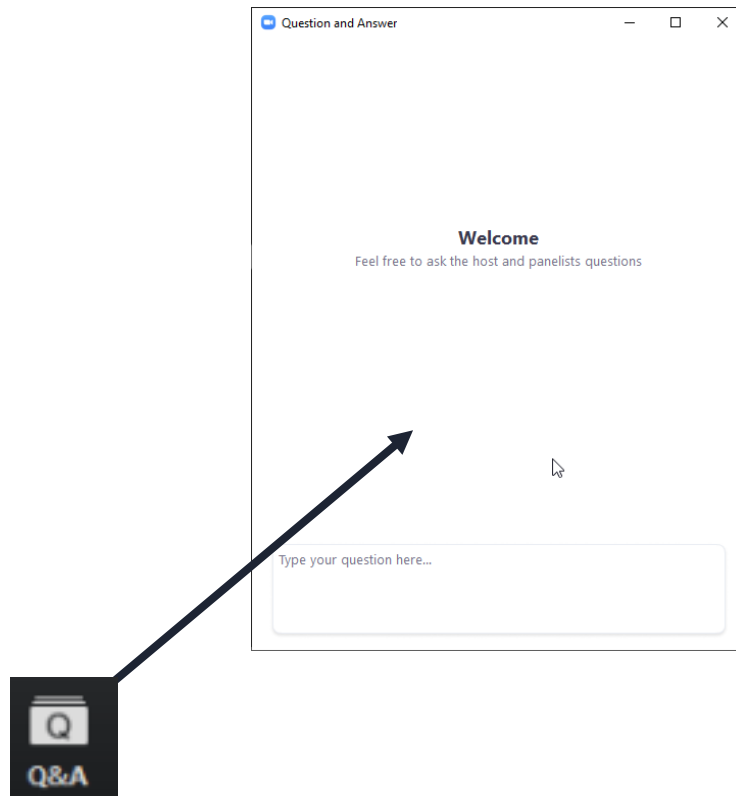


PPM Pro Customer Webinar: May 2020 Release

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



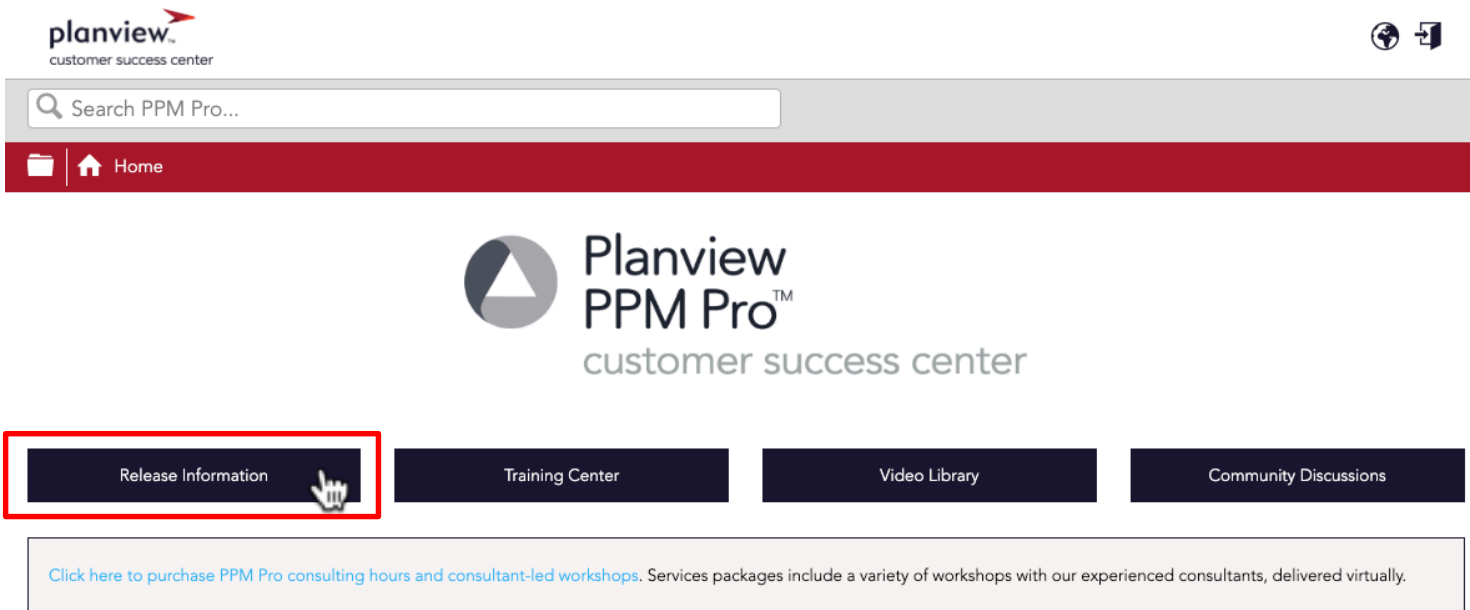
Today's Agenda

- 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



Monthly Release Schedule

First
Friday

- Release Notes Published

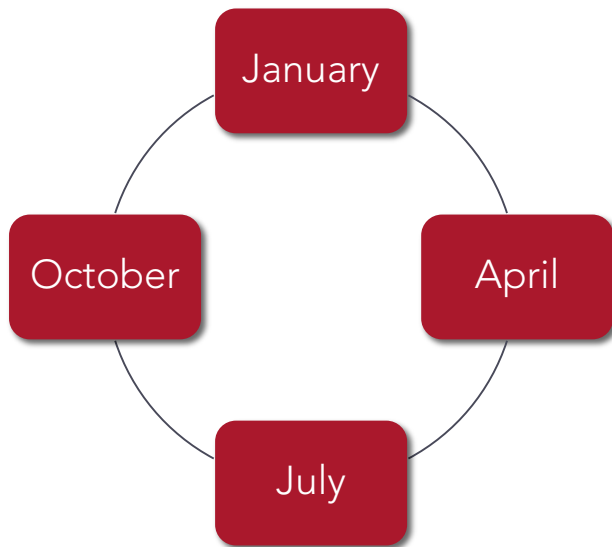
Second
Friday

- 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.

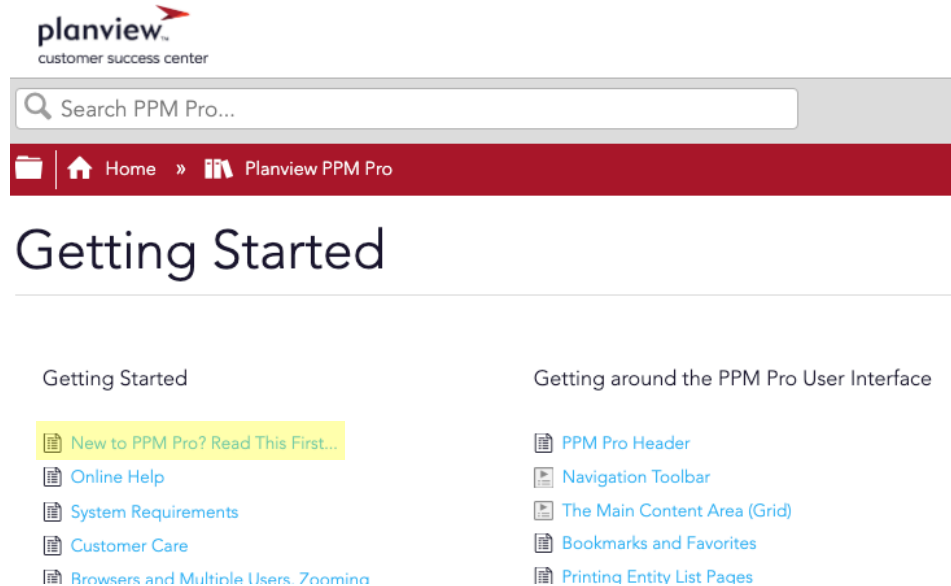
Get early access to features in your sandbox

- 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
- Gantt report type
- **Export to PowerPoint**

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
- Dashboards with WYSIWYG designer:
 - Reports and rich text/image content
 - Runtime and view filters
- Home and project Overview (dashboards)

Reports Revamp – Export to PowerPoint

All report Types except List, Crosstab, Gantt

The image shows a software interface for Planview Reports Revamp. On the left, a dropdown menu is open, listing various export options. The 'Export to PowerPoint' option is highlighted with a blue background and a red arrow pointing to the right. The main area displays a report titled 'Report (9) — Saved to my Mac'. The report is a radar chart comparing three data series: Budget Cost (Total), Total Forecast Cost, and Total Actual Cost across six categories: Business Growth, Productivity, Customer Service, Employee Retention, Maintain Financing, and a central point. The chart shows that the Total Actual Cost is generally lower than the Budget Cost and Total Forecast Cost across most categories. The interface includes a top navigation bar with tabs like Home, Insert, Draw, Design, Transitions, Animations, Slide Show, and Review. The bottom status bar indicates 'Slide 1 of 1', 'English (United States)', and a zoom level of 86%.

View in full screen

Print

Export PNG

Export JPG

Export/Print to PDF

Export SVG vector image

Export to PowerPoint

Export to Excel

Export CSV

Export TSV

Report (9) — Saved to my Mac

Home Insert Draw Design Transitions Animations Slide Show Review

Paste Slides

Paragraph Insert Drawing Sensitivity

1

Business Growth

Productivity

Customer Service

Employee Retention

Maintain Financing

\$20,000,000.00

\$15,000,000.00

\$10,000,000.00

\$5,000,000.00

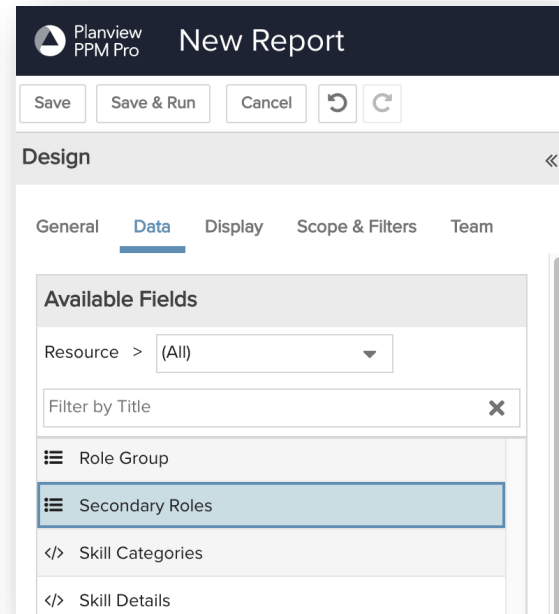
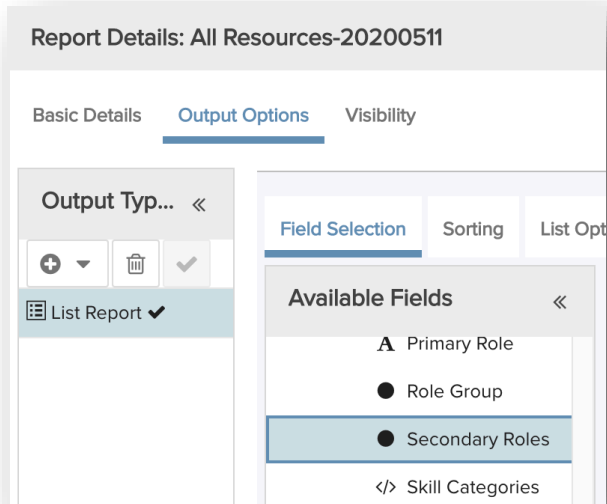
\$0.00

◆ Budget Cost (Total) ◆ Total Forecast Cost ◆ Total Actual Cost

Slide 1 of 1 English (United States) Notes Comments 86%

Enhancement – Report on Secondary Roles

Legacy and new Reports (beta)



Enhancement – Update Internal Rates on Timesheets

Retroactively update Timesheet internal rates

The screenshot shows the Planview PPM Pro interface. The top navigation bar includes Home, Organization, Requests, Projects, Project Logs, and Resources. The left sidebar shows a tree view with Sections: Organization, Manage Time, and Finances. The main content area is titled 'Manage Resource Time' and contains a table of timesheet entries. A context menu is open over the table, showing options like Submit, Approve, Reject, Unsubmit, Adjust Internal Rates, and View History.

Name	Start Date	End Date	Billable	Non-Billa...	Total	Ap
1, MC_Resource1	4/27/2020	5/3/2020	0.00	0.00	0.00	No
	5/4/2020	5/10/2020	0.00	0.00	0.00	No
	5/11/2020	5/17/2020	0.00	0.00	0.00	No
Adams, Alex	4/27/2020	5/3/2020	0.00	40.00	40.00	Fu
	5/4/2020	5/10/2020	15.00	25.00	40.00	Pe
	5/11/2020	5/17/2020	0.00	18.00	18.00	In Progress
Adams, Joseph	4/27/2020	5/3/2020	0.00	0.00	0.00	Not Started

From April Webinar – Calc Field for Hiding Time

1 Calculated field: Standard Entity, String

Formula:

```
FormatDate([Task].[Start Date],'yy MMM d')
```

Calculated Fields

View	New	Report List	Actions
Entity	Title	Description	Data Type
Request	Estimates-Forecast		Integer
Task	Start Date-only		String
Task	Target Date-only		String

2 Admin available Grid columns

Task Grid Columns

Available Fields 1

Type to Find Available Field

Act Billable Amt

Active?

Actual Cost

Actual Hours

Actual Hours Cost

Approved By

Assignment XML

Associated Actuals

Associated Forecasts

Default Grid Columns (14) [Maximum of 14]

Move to Other

Number

Outline

Title

Duration

Start Date

Other Available Grid Columns (5)

Move to Default

Start Date-only

Target Date-only

3 Configure entity grid columns

Tasks

Filter Tasks

Color by: None

Info	Outline	Title	Duration	Start Date-only	Target Date-only
18	1.5	JD10	40 days	20 May 6	20 Jun 30

Thanks Jennie Reynolds from
Cascade Corporation!

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>

Virtual Planview Horizons Customer Conference 2020



\$249 until June 26!

\$299 after June 26

Discounted group rates available

www.PlanviewHorizons.com



Accepting Call for Presentations
Share your story and best practices!



Bonita Norris announced as keynote speaker! Bonita was the youngest British woman to reach the summit of Mount Everest at the age of 22, with no previous climbing experience!


Upcoming Webinars/Events

- Q2 2020 Roadmap May 27
- June Release Webinar June 17
- Register for all webinars in advance!
- <https://success.planview.com/Planview PPM Pro/Release Information/Customer Webinars>

RELEASE INFORMATION

Planview PPM Pro Customer Webinars

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