



Planview PPM Pro – Product Roadmap

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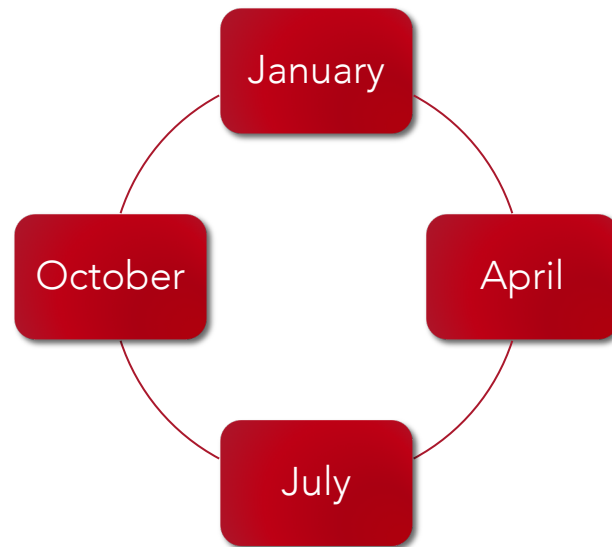
May 27, 2020

Disclaimer

- Roadmap represents the current state of planning, is provided for illustrative purposes only, and can be changed by Planview without notice.
- This presentation and Planview's strategy and possible future developments are subject to change and may be changed by Planview at any time for any reason without notice.
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PPM Pro Release Cycle

- Monthly
 - Defect fixes and enhancements
 - Beta roadmap feature capabilities
- Quarterly
 - General availability (GA) features
- Agile development
 - Beta and GA dates are squishy
 - Release when feature is ready



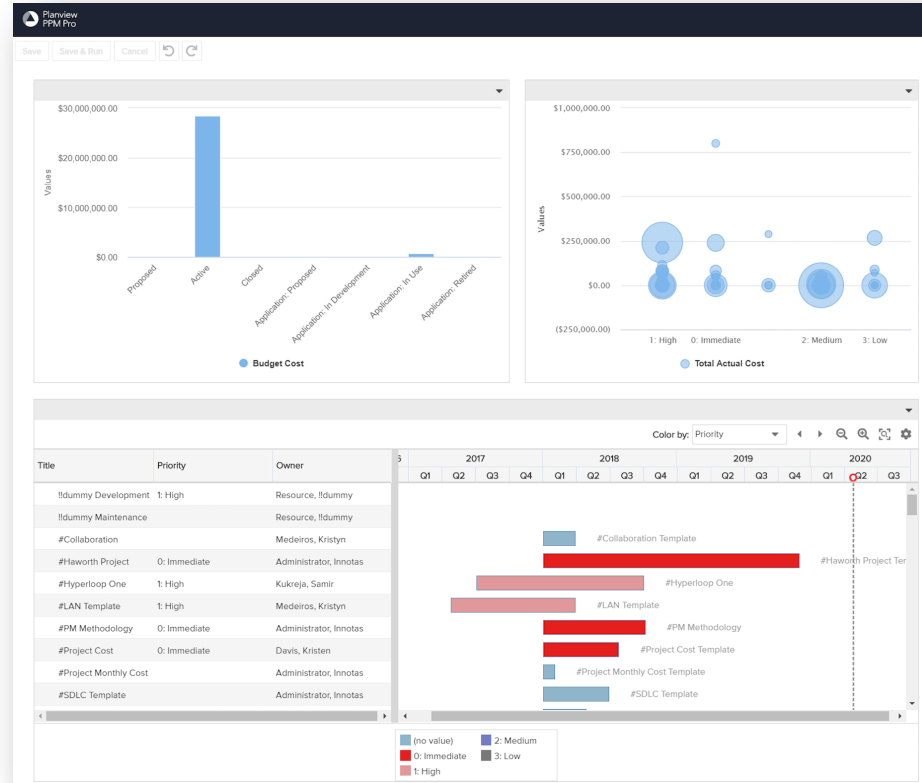
Current Roadmap Focus

- **Reporting 2.0 (in beta)**
 - High level Task Timeline 🏆
 - Gantt Phases and Milestones 🏆
- **Financial Summary (beta July)**
 - Negative Financial Entries
- **Planview ID**
 - Iterative Work Management
 - LeanKit & Projectplace Int v2
- Resource Self Service Admin (SSA)
- Dependent Field Logic
- User/Group/Unit Field Restrictions 🏆
- Spreadsheet Editor – SSA Entities 🏆
- Archiving Projects 🏆
- Alerts 2.0



Reporting 2.0 (in Beta)

- Easier to design and customize, WYSIWYG
- More widgets, modern look and feel
- Report on indirect data
- Dashboard publish any time of day + URL text config
- Export to PowerPoint
- Home and Project Overview
- And so much more!



High-Level Task Timeline 🏆

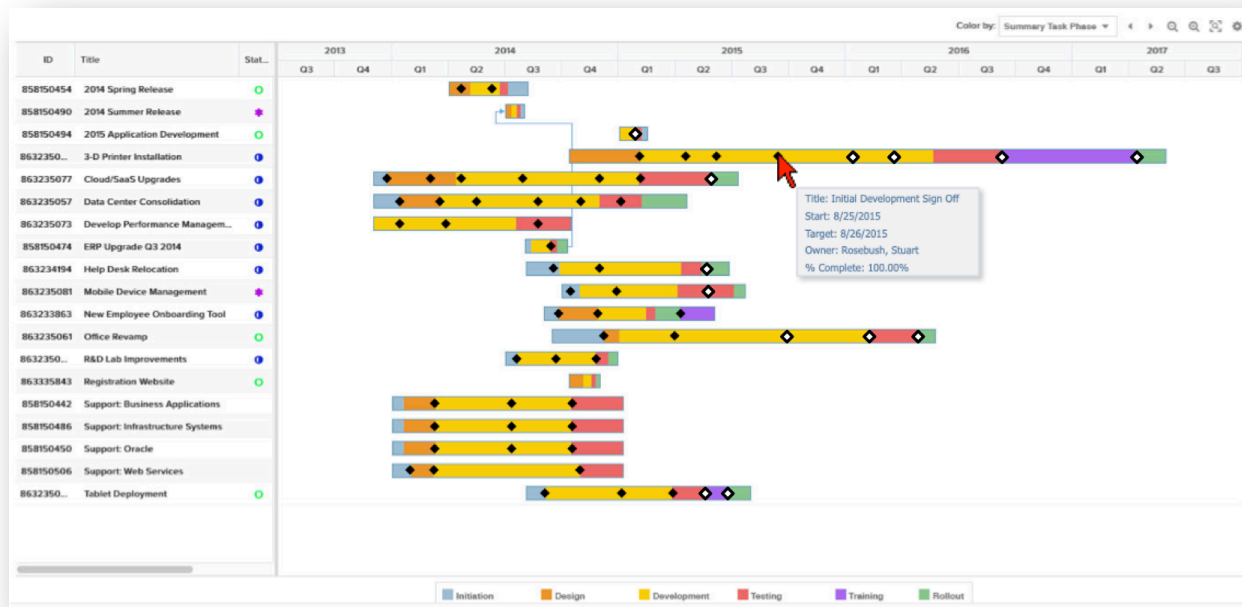
Option to show key tasks on a high-level timeline that can be shown above Tasks grid

The screenshot displays the Planview PPM Pro interface for a project named 'Data Center Consolidation'. The main view is a Gantt chart showing a high-level task timeline for the year 2015. The timeline is divided into months from January to August. Key tasks are highlighted with colored bars: 'Design' (blue), 'Development' (yellow), 'Detailed Developments' (orange), and 'Testing' (red). Below the timeline is a table of tasks with columns for Info, #, Outline, Title, Duration, Start Date, Target Date, Complete Date, Scheduled Resources, and Predecessors. The table lists tasks such as 'Project Initiation', 'Design', 'Finalize Detailed Designs', 'Create Project Infrastructure', 'Development', 'High Level Development', 'Detailed Developments', 'Development Phase Sign-off', 'Initiation Phase Sign-off', and 'Testing'. A right-hand panel titled 'Finalize Detailed Designs' is open, showing details for a specific task, including Scheduling (Constraint Type, Constraint Date, Predecessors, Successors), Active? checkbox, Manually Scheduled? checkbox, Milestone checkbox, Show on Timeline dropdown (set to Target Date), Critical? checkbox, Has Scheduling Conflicts? checkbox, Other Details (Complete Date, Start Date, Target Date, Start Date to Complete Date, Start Date to Target Date), Description, and Objective.

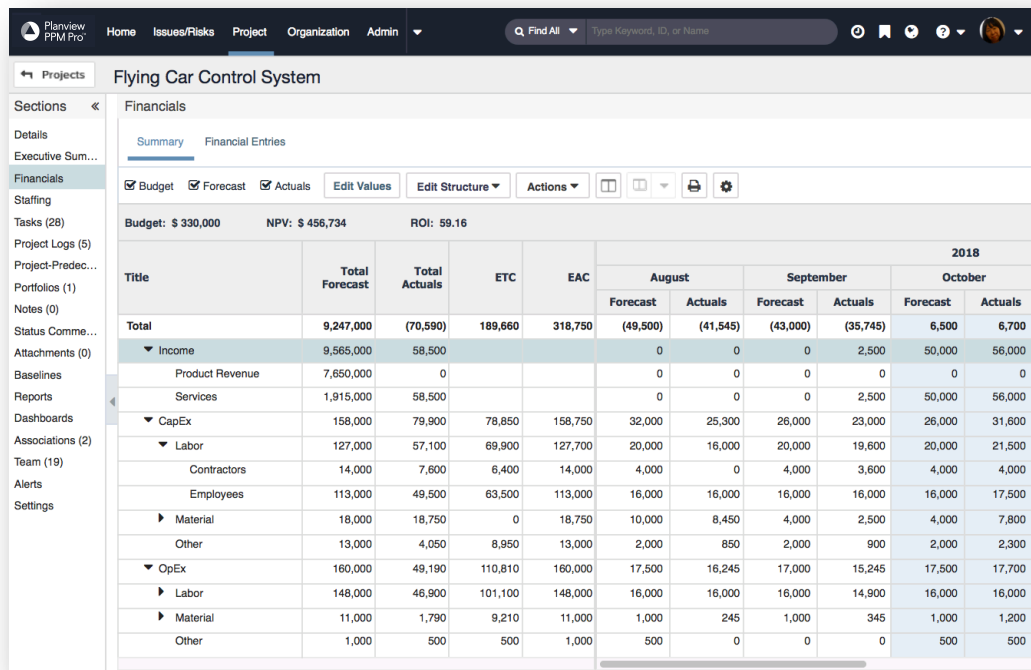
| Info | # | Outline | Title | Duration | Start Date | Target Date | Complete Date | Scheduled Resources | Pre. |
|------|----|---------|-------------------------------|----------|-------------------|-------------------|------------------|---------------------------|------|
| | | | All Tasks | 160 days | 1/16/2015 9:00 AM | 8/28/2015 5:00 PM | | | |
| | 1 | 1 | Project Initiation | 32 days | 1/16/2015 9:00 AM | 3/2/2015 5:00 PM | | | |
| | 8 | 2 | Design | 40 days | 3/2/2015 9:00 AM | 4/24/2015 5:00 PM | | Jeff Austin, Kristen D... | 1 |
| | 9 | 2.1 | Design Activities | 40 days | 3/2/2015 9:00 AM | 4/24/2015 5:00 PM | 1/23/2014 2:0... | Shlok Vaidya | 7 |
| | 10 | 2.2 | Finalize Detailed Designs | 10 days | 4/2/2015 9:00 AM | 4/15/2015 5:00 PM | | Ada Lovelace, Andir... | 9 |
| | 11 | 2.3 | Create Project Infrastruct... | 2 days | 4/16/2015 9:00 AM | 4/17/2015 5:00 PM | | Andira Fargo, Kristen... | 10 |
| | 12 | 3 | Development | 59 days | 4/20/2015 9:00 AM | 7/10/2015 5:00 PM | | Andira Fargo, Jeff Au... | |
| | 13 | 3.1 | High Level Development | 12 days | 4/20/2015 9:00 AM | 5/5/2015 5:00 PM | | Ada Lovelace, Andir... | 11 |
| | 14 | 3.2 | Detailed Developments | 45 days | 5/6/2015 9:00 AM | 7/8/2015 5:00 PM | | Andira Fargo, Kristen... | 13 |
| | 15 | 3.3 | Development Phase Sign... | 1 day | 7/9/2015 9:00 AM | 7/9/2015 5:00 PM | | Andira Fargo, Kristen... | 14 |
| | 16 | 3.4 | Initiation Phase Sign Off | 1 day | 7/10/2015 9:00 AM | 7/10/2015 5:00 PM | | Andira Fargo, Kristen... | 15 |
| | 17 | 4 | Testing | 71 days | 4/15/2015 9:00 AM | 7/23/2015 5:00 PM | | Jeff Austin, Kristen D... | |

Gantt Phases and Milestones 🏆

Ability to show Milestone tasks and Phases on Project Gantt bars



Financial Summary (beta target July)



The screenshot shows the Planview PPM Pro interface for the 'Flying Car Control System' project. The 'Financials' section is active, displaying a summary table with columns for Title, Total Forecast, Total Actuals, ETC, EAC, and monthly data for August, September, and October 2018. The table includes rows for Income, CapEx, Labor, and Material, with sub-rows for specific categories like Product Revenue, Services, Contractors, Employees, and Other. The interface also shows a left sidebar with navigation options and a top navigation bar with tabs for Home, Issues/Risks, Project, Organization, and Admin.

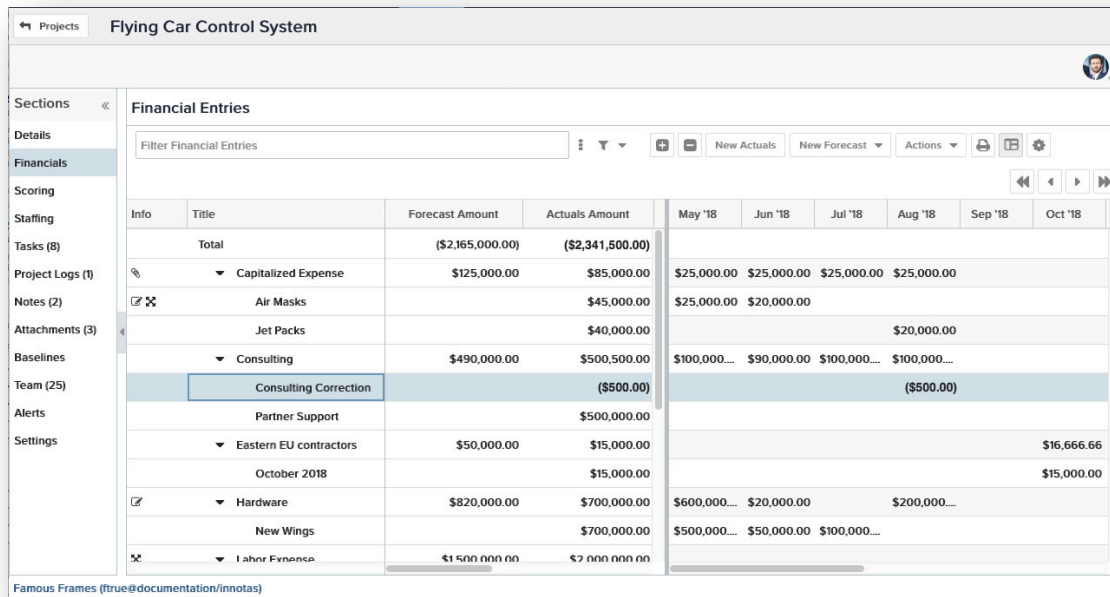
| Title | Total Forecast | Total Actuals | ETC | EAC | 2018 | | | | | |
|-----------------|------------------|-----------------|----------------|----------------|-----------------|-----------------|-----------------|-----------------|--------------|--------------|
| | | | | | August | | September | | October | |
| | | | | | Forecast | Actuals | Forecast | Actuals | Forecast | Actuals |
| Total | 9,247,000 | (70,590) | 189,660 | 318,750 | (49,500) | (41,545) | (43,000) | (35,745) | 6,500 | 6,700 |
| ▼ Income | 9,565,000 | 58,500 | | | 0 | 0 | 0 | 2,500 | 50,000 | 56,000 |
| Product Revenue | 7,650,000 | 0 | | | 0 | 0 | 0 | 0 | 0 | 0 |
| Services | 1,915,000 | 58,500 | | | 0 | 0 | 0 | 2,500 | 50,000 | 56,000 |
| ▼ CapEx | 158,000 | 79,900 | 78,850 | 158,750 | 32,000 | 25,300 | 26,000 | 23,000 | 26,000 | 31,600 |
| ▼ Labor | 127,000 | 57,100 | 69,900 | 127,700 | 20,000 | 16,000 | 20,000 | 19,600 | 20,000 | 21,500 |
| Contractors | 14,000 | 7,600 | 6,400 | 14,000 | 4,000 | 0 | 4,000 | 3,600 | 4,000 | 4,000 |
| Employees | 113,000 | 49,500 | 63,500 | 113,000 | 16,000 | 16,000 | 16,000 | 16,000 | 16,000 | 17,500 |
| ► Material | 18,000 | 18,750 | 0 | 18,750 | 10,000 | 8,450 | 4,000 | 2,500 | 4,000 | 7,800 |
| Other | 13,000 | 4,050 | 8,950 | 13,000 | 2,000 | 850 | 2,000 | 900 | 2,000 | 2,300 |
| ▼ OpEx | 160,000 | 49,190 | 110,810 | 160,000 | 17,500 | 16,245 | 17,000 | 15,245 | 17,500 | 17,700 |
| ► Labor | 148,000 | 46,900 | 101,100 | 148,000 | 16,000 | 16,000 | 16,000 | 14,900 | 16,000 | 16,000 |
| ► Material | 11,000 | 1,790 | 9,210 | 11,000 | 1,000 | 245 | 1,000 | 345 | 1,000 | 1,200 |
| Other | 1,000 | 500 | 500 | 1,000 | 500 | 0 | 0 | 0 | 500 | 500 |

Configuration of all project financial feeds and rollups:

- Budget, forecast, actuals
- EAC, ETC, NPV, ROI, EV, PV, AC, BAC, CPI, SPI, TCPI, VAC, CV, SV
- Project templates
- Baselines

Negative Financial Entries

Allow negative entries on Financial Forecasts and Actuals



Projects Flying Car Control System

Sections « Financial Entries

Details

Financials

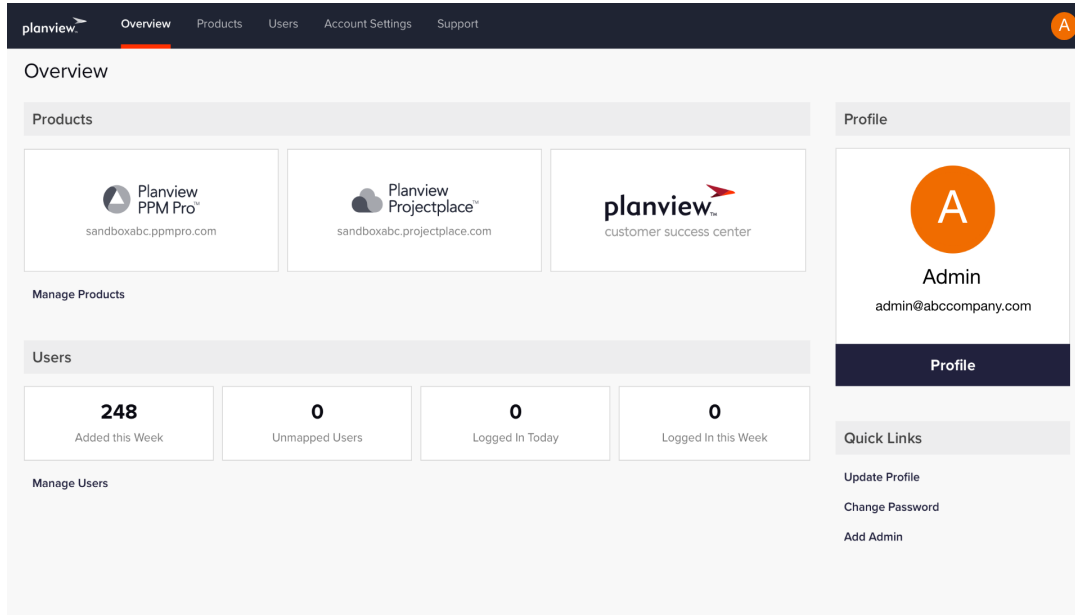
Filter Financial Entries

New Actuals New Forecast Actions

| Info | Title | Forecast Amount | Actuals Amount | May '18 | Jun '18 | Jul '18 | Aug '18 | Sep '18 | Oct '18 |
|------|------------------------|------------------|------------------|--------------|-------------|--------------|--------------|---------|-------------|
| | Total | (\$2,165,000.00) | (\$2,341,500.00) | | | | | | |
| ▼ | Capitalized Expense | \$125,000.00 | \$85,000.00 | \$25,000.00 | \$25,000.00 | \$25,000.00 | \$25,000.00 | | |
| ✕ | Air Masks | | \$45,000.00 | \$25,000.00 | \$20,000.00 | | | | |
| | Jet Packs | | \$40,000.00 | | | | \$20,000.00 | | |
| ▼ | Consulting | \$490,000.00 | \$500,500.00 | \$100,000.00 | \$90,000.00 | \$100,000.00 | \$100,000.00 | | |
| | Consulting Correction | | (\$500.00) | | | | (\$500.00) | | |
| | Partner Support | | \$500,000.00 | | | | | | |
| ▼ | Eastern EU contractors | \$50,000.00 | \$15,000.00 | | | | | | \$16,666.66 |
| | October 2018 | | \$15,000.00 | | | | | | \$15,000.00 |
| ✕ | Hardware | \$820,000.00 | \$700,000.00 | \$600,000.00 | \$20,000.00 | | \$200,000.00 | | |
| | New Wings | | \$700,000.00 | \$500,000.00 | \$50,000.00 | \$100,000.00 | | | |
| ✕ | Labor Expense | \$1,500,000.00 | \$2,000,000.00 | | | | | | |

Famous Frames (true@documentation/innotas)

Planview ID



- Centralized user management to view and manage users' access across Planview products
- Users login to multiple Planview products with single username and password
- Contact jhigh@planview.com for more info

Iterative Work Management

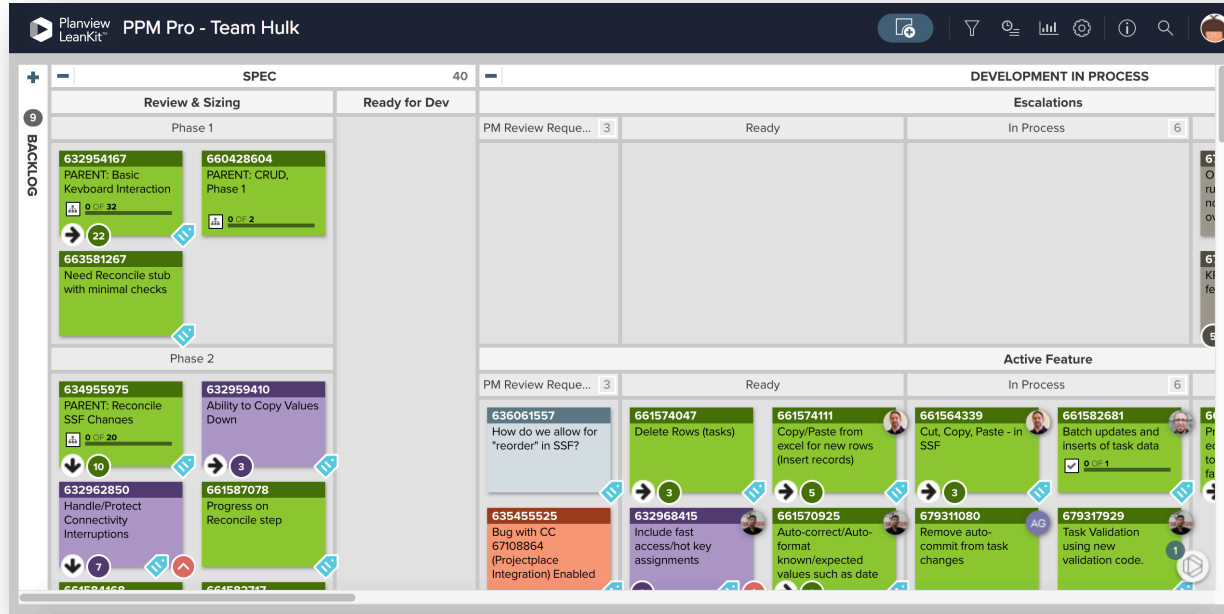
- Phase 1: Time-independent work items, optional:
 - Start date
 - Target date
 - Duration
- Phase 2: Task Backlog

The screenshot displays the Planview PPM Pro interface for the 'Hyperspace Bypass' project. The left sidebar shows a 'Task Backlog' with a search bar and a list of tasks. The main area shows a 'Task' list with columns for Info, Duration, Est E..., Act E..., Title, Outline, Start Date, Target Date, Complete Date, and Category. A red arrow points to the 'UI Card view' task in the backlog, and a green arrow points to the 'Initiation' task in the main list. A tooltip indicates 'Drag and drop to move task'.

| Est Effort | Title | Priority |
|------------|---------------------|----------|
| 5 | SSA Details view | High |
| 3 | SSA Searchabl... | Medi... |
| 4 | UI Grid view | High |
| 4 | Ad hoc filter | High |
| 3 | New/edit modals | High |
| 10 | Entity report so... | High |
| 6 | Data Import | High |
| 6 | API | High |
| | Copy entity | Low |
| | Spreadsheet Edit | Medi... |
| 5 | SSA Card view | Low |
| 4 | UI Card view | Low |
| | Print grid | Low |
| | Bulk Edit | |
| 6 | SSA Available F... | High |

| Info | Duration | Est E... | Act E... | Title | Outline | Start Date | Target Date | Complete Date | Category |
|------|----------|----------|----------|----------------|---------|-------------------|--------------------|---------------|----------|
| | 59 days | 35 | | All Tasks | | 8/16/2018 9:00 AM | 12/31/2018 5:00 PM | | |
| | 15 days | | | Initiation | 1 | 8/16/2018 9:00 AM | 8/31/2018 5:00 PM | | Task |
| | 19 days | 18 | | September | 2 | 9/3/2018 9:00 AM | 9/28/2018 5:00 PM | | Task |
| | | 12 | | New SSA ent... | 2.1 | | | | Story |
| | | 6 | | Permissions... | 2.2 | | | | Story |
| | 25 days | | | October | 3 | 10/1/2018 9:00 AM | 11/2/2018 5:00 PM | | Task |
| | | | | November | 4 | 11/5/2018 9:00 AM | | | Task |
| | | 17 | | December | 5 | | | | Task |
| | | | | Post-Mortem | 6 | | | | Task |

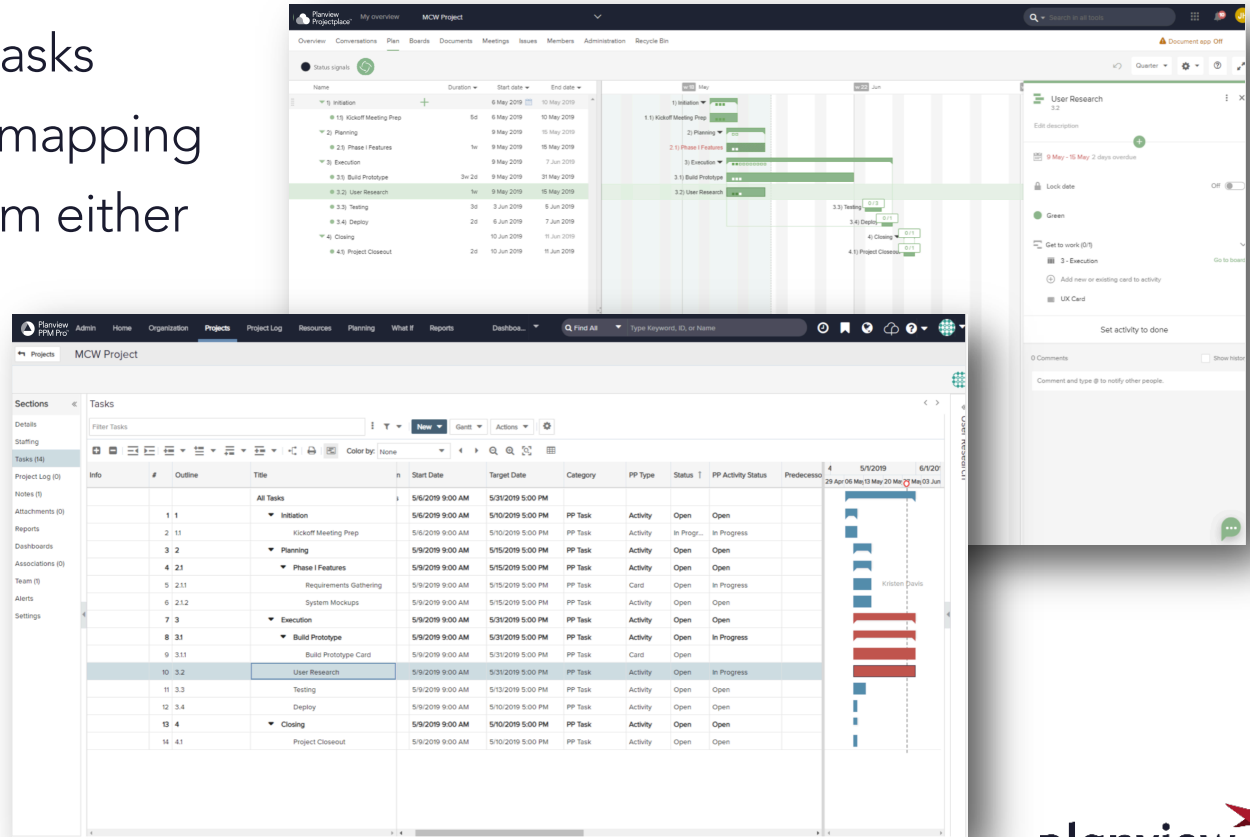
Integrations: LeanKit v2



- Mapping and data sync:
 - LK cards with PPM Pro projects, tasks, possibly issues
 - LK fields with PPM Pro entity fields
- Agile Costing

Integrations: Projectplace v2

- Cards mapped to tasks
- Configurable data mapping
- WBS controlled from either solution



Resource SSA (Self-Service Admin)

Planview PPM Pro Home Resources Project Organization Admin

Find All Type Keyword, ID, or Name

Sections

- Organization
 - Permission Profiles
 - Users
- Groups
- Setup
 - Offices/Regions
 - Calendars
 - Lookup Lists
 - Skills
 - All Entities
 - People
 - Available Fields
 - Categories
 - Details**
 - Additional Details
 - User Details
 - Grid Columns
 - Searchable Fields
 - Filters
 - Trend Fields
 - Scoring
 - Publishing
 - Scheduled Jobs
 - Data Import
 - Web Services API

People Details

Category: Contractor

Available Fields

Type to Find Available Field

- Active
- Alternate for Timesheet Approval
- Billing Rate
- Can Edit Calendar
- Confirm Password
- Created By
- Department
- Description
- Division
- Effective Base Calendar
- Enterprise
- Full Admin
- Hire Date
- ID

Group Header:

Details

Move Up Move Down

- First Name
- Last Name
- Unit
- Primary Role
- Today's Internal Rate
- Capacity Multiplier
- Email
- Disable Alerts

Field: First Name

Save Cancel

Restrictions

Field Access Unrestricted - This field can be seen and/or used by anyone

Common Properties

Method ID 100442

Title First Name

Field Origin Standard

Description Person's first name.

Field Type String

Details Display Name

Variable Properties

Required ☐

Default Value

Show on New Yes

Show on Edit Yes - Editable

- Admin configurable entity
- Profile-based Permissions
- Standard groups (such as Organization, Resource) converted to permission profiles

Dependent Field Logic

Based on another field's value or other property

- Filter lookup list options
- Hide/show other fields
- Set a value on another field
- Make another field required

| | |
|----------------------------|-----------------|
| ID | 1963916548 |
| Title * | Customer Treats |
| Description | |
| Requester * | Entrekin, Caleb |
| Benefits | |
| Potential Business Value ↑ | |
| Create Date | |

High

Medium

Low

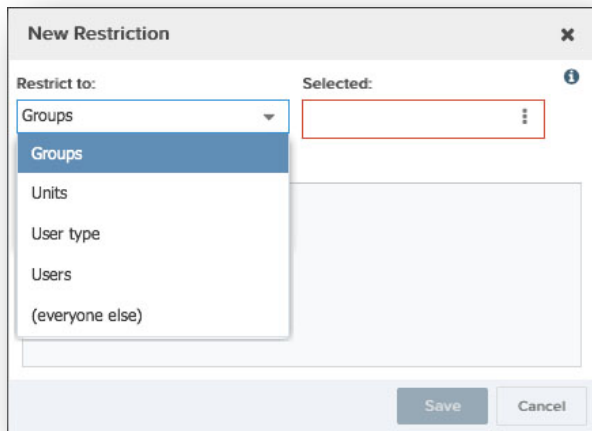
Will bring great things to the company



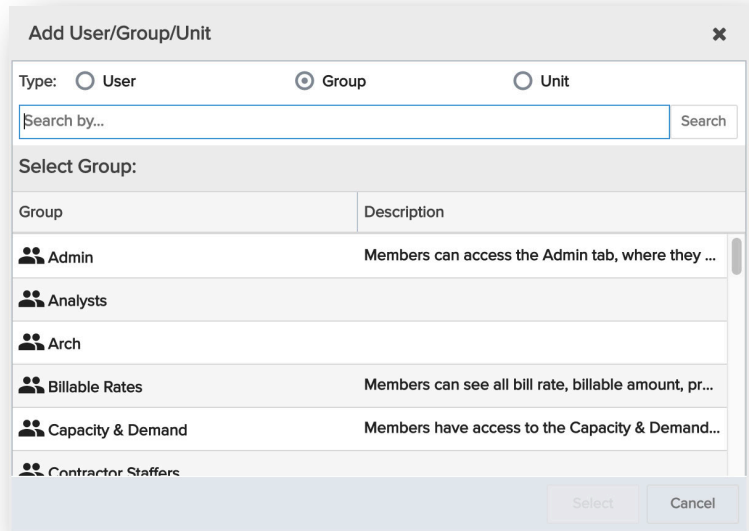
| | |
|----------------------------|-----------------|
| ID | 1963916548 |
| Title * | Customer Treats |
| Description | |
| Requester * | Entrekin, Caleb |
| Benefits | |
| Potential Business Value ↑ | High |
| Business Objective | |
| Create Date | 2/5/2019 |

User/Group/Unit Field Restrictions







Add Users, Groups, and Units to the “Restrict to” field*



The "New Restriction" dialog box features a "Restrict to:" dropdown menu with a list of options: Groups, Units, User type, Users, and (everyone else). The "Groups" option is currently selected and highlighted. To the right of the dropdown is a "Selected:" field, which is an empty rectangular box with a red border. At the bottom right of the dialog are "Save" and "Cancel" buttons.



The "Add User/Group/Unit" dialog box has three radio buttons for "Type": "User", "Group" (which is selected), and "Unit". Below these is a search bar labeled "Search by..." with a "Search" button. Underneath is a section titled "Select Group:" containing a table of groups.

| Group | Description |
|---|---|
|  Admin | Members can access the Admin tab, where they ... |
|  Analysts | |
|  Arch | |
|  Billable Rates | Members can see all bill rate, billable amount, pr... |
|  Capacity & Demand | Members have access to the Capacity & Demand... |
|  Contractor Staffers | |

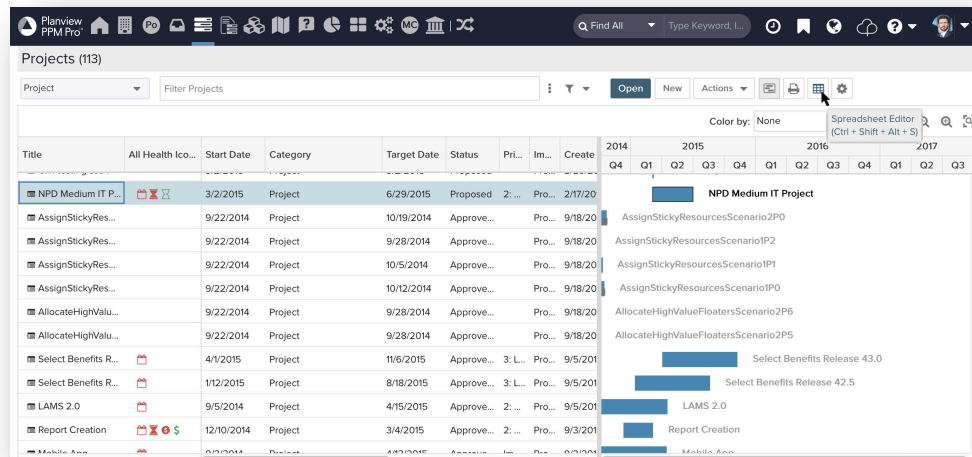
At the bottom right of the dialog are "Select" and "Cancel" buttons.

*Likely part of Dependent Field Logic

Spreadsheet Editor – SSA Entities 🏆

For remaining Self Service Admin entities (Project Logs, Projects, and so on):

- Spreadsheet-style keyboard interaction
- Undo/Redo
- Copy/paste to and from other spreadsheet tools
- Text box editing
- Does not include entity contours

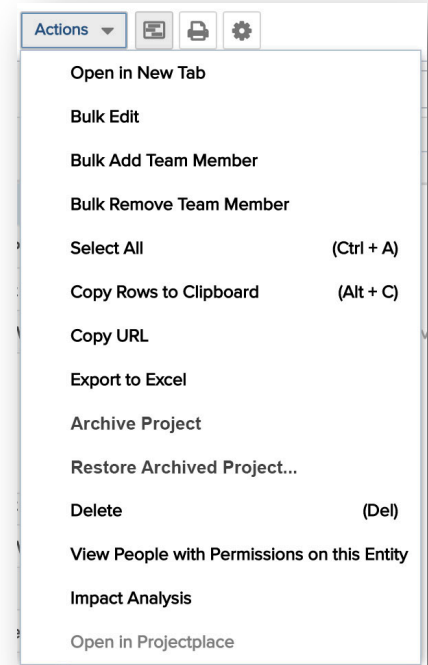


The screenshot displays the Planview PPM Pro Spreadsheet Editor interface. The main window shows a table of projects with columns for Title, All Health Icons, Start Date, Category, Target Date, Status, Priority, Importance, and Create. The table lists various projects such as 'NPD Medium IT Project', 'AssignStickyResourcesScenario2P0', and 'LAMS 2.0'. A right-hand pane shows a detailed view of the selected project, 'NPD Medium IT Project', with a timeline and associated resources. The interface includes a top navigation bar with icons for different views and a search bar.

| Title | All Health Icons | Start Date | Category | Target Date | Status | Priority | Importance | Create |
|--------------------------------------|------------------|------------|----------|-------------|------------|----------|------------|---------|
| NPD Medium IT Project | | 3/2/2015 | Project | 6/29/2015 | Proposed | 2 | Pro... | 2/17/20 |
| AssignStickyResourcesScenario2P0 | | 9/22/2014 | Project | 10/19/2014 | Approve... | Pro... | 9/18/20 | |
| AssignStickyResourcesScenarioIP2 | | 9/22/2014 | Project | 9/28/2014 | Approve... | Pro... | 9/18/20 | |
| AssignStickyResourcesScenarioIP1 | | 9/22/2014 | Project | 10/5/2014 | Approve... | Pro... | 9/18/20 | |
| AssignStickyResourcesScenarioIP0 | | 9/22/2014 | Project | 10/12/2014 | Approve... | Pro... | 9/18/20 | |
| AllocateHighValueFloatersScenario2P6 | | 9/22/2014 | Project | 9/28/2014 | Approve... | Pro... | 9/18/20 | |
| AllocateHighValueFloatersScenario2P5 | | 9/22/2014 | Project | 9/28/2014 | Approve... | Pro... | 9/18/20 | |
| Select Benefits Release 43.0 | | 4/1/2015 | Project | 11/6/2015 | Approve... | 3: L... | Pro... | 9/5/201 |
| Select Benefits Release 42.5 | | 1/12/2015 | Project | 8/18/2015 | Approve... | 3: L... | Pro... | 9/5/201 |
| LAMS 2.0 | | 9/5/2014 | Project | 4/15/2015 | Approve... | 2 | Pro... | 9/5/201 |
| Report Creation | | 12/10/2014 | Project | 3/4/2015 | Approve... | 2 | Pro... | 9/3/201 |
| Mobile App | | 12/10/2014 | Project | 3/4/2015 | Approve... | 2 | Pro... | 9/3/201 |

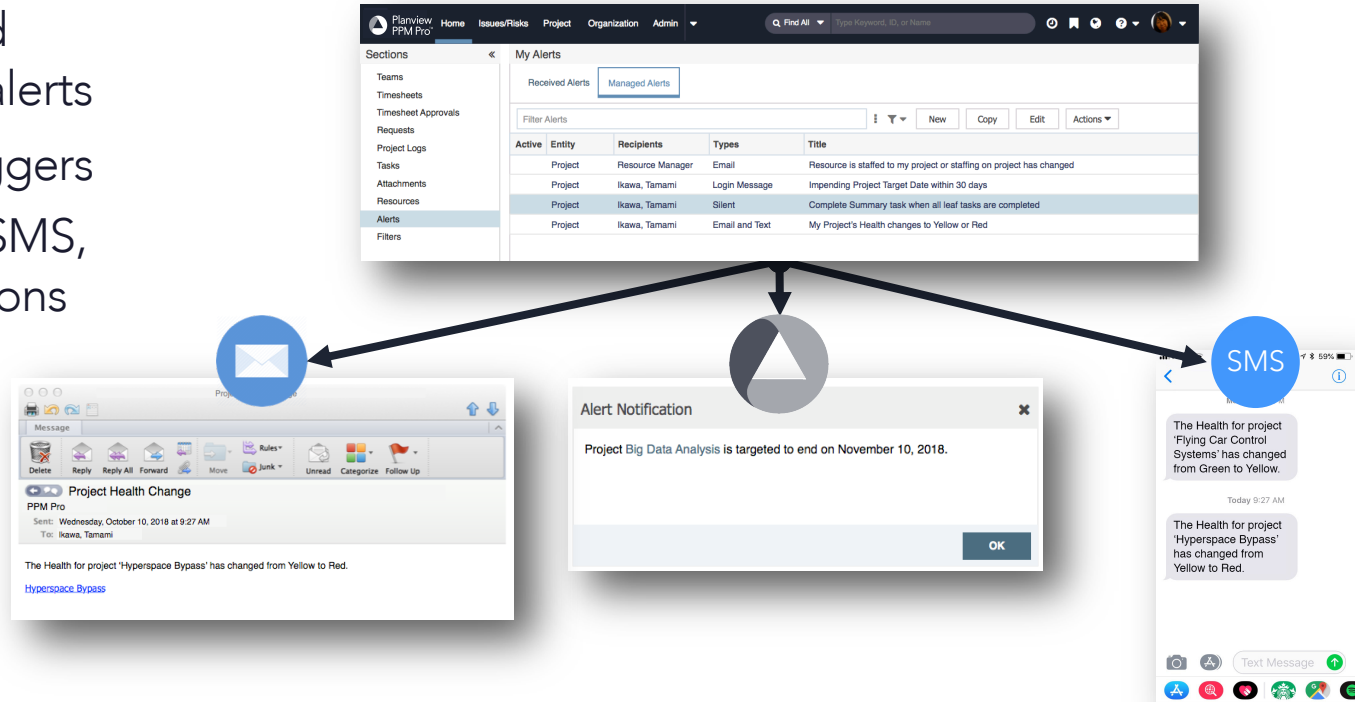
Archiving Projects 🏆

- “Archive Project” option:
 - Removes project and its child entities (tasks, project logs, and so on) from all views, portfolios, associations, filters, pick lists, and other general access
 - Timesheet data remains but is no longer linked to anything
 - Remaining resource demand not included in capacity/demand analyses
- “Restore Archived Project...” option
- Permissions for archiving and restoring archived projects



Alerts 2.0

- Easier, centralized management of alerts
- Customizable triggers
- Agnostic: email, SMS, browser notifications
- Advanced logic
- Alert resolution



Customer Driven Product

Customer Inner Circles

User Experience

Reporting + Artifacts

Tactics to Respond Quickly

Customer Roadmap Challenges



Planview
Spigit™

Customer Enhancement Requests

planview™
customer success center

Customer Benefits

Planview Benefits

Participation in requirements, design, and prioritization

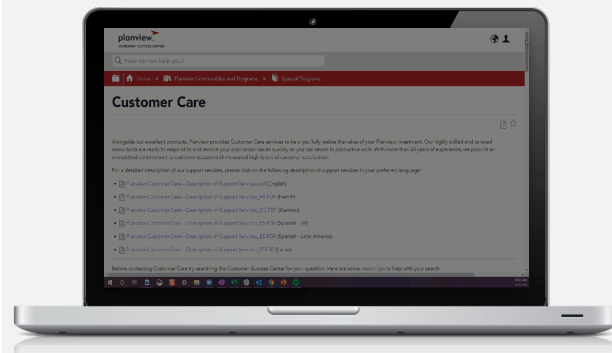
Voice of the customer

Early view into new functionality

Accurate, real-life use cases

Direct access to other customers and Planview Product Management

Early feedback and results for high quality product outputs





Thank You