



PPM Pro Customer Webinar: June 2020 Release

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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 in post-webinar email, including additional info about the release process



Current Month's Feature Status



Reports Revamp (rolling)



Reports Revamp – Rolling Beta

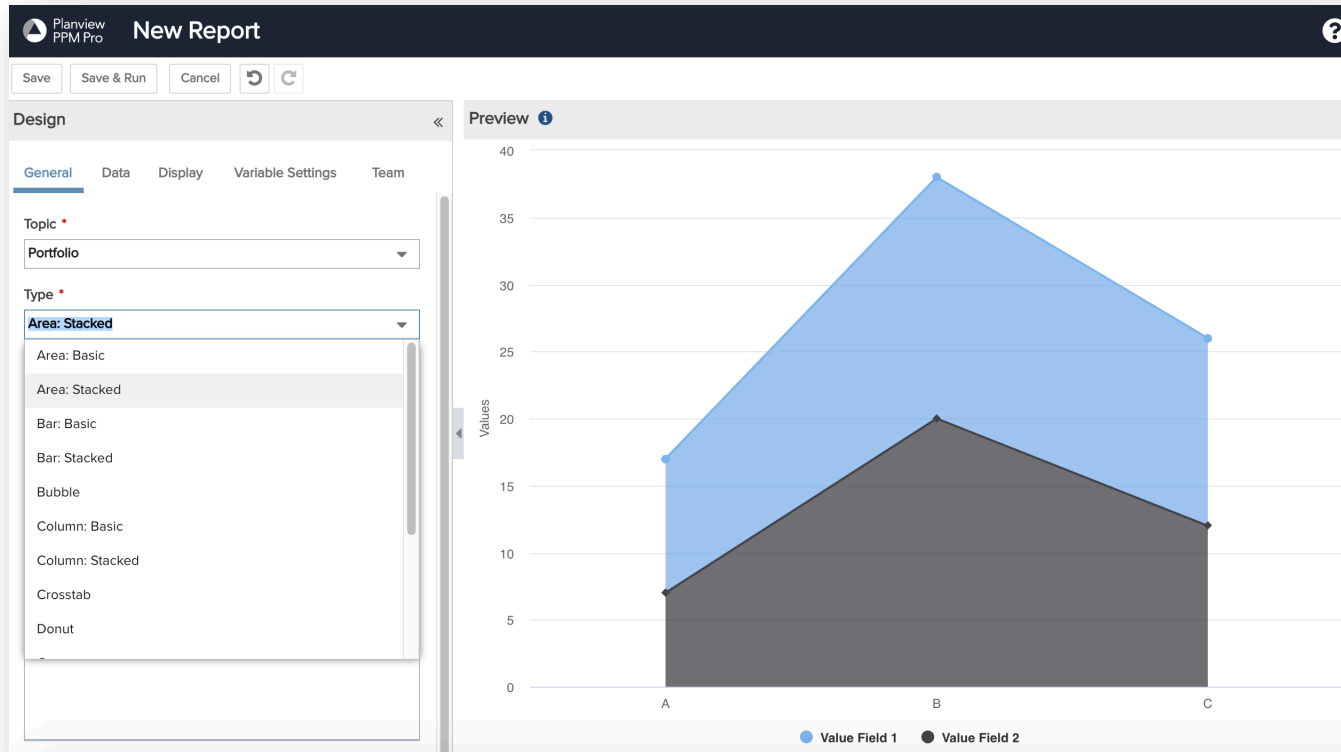
Current Beta Functionality

- Usability enhancements
- New Reports grid with Group By
- Basic report topics and types
- New WYSIWYG report designer
- List report options within preview
- Runtime and view filter options
- 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
- Initial export to PowerPoint
- Stacked area report type
- Grouping, sorting and aggregations
- Basic time series
- Reports grid Settings

Future Releases

- Report drilldown
- WYSIWYG dashboard designer
- Home and project Overview dashboards
- Reports with time series/contoured data (staffing/resource planning, Audit, KPI, etc.)
- Portfolios and sub-portfolios reports
- Remaining reports and dashboard PPT, PDF, and/or Excel export
- Capacity and demand report
- Dashboard publishing and expiration
- Org level defaults for reports and dashboards
- Calculated fields for secondary entities
- Rich text/image dashboard content
- Additional report types
- Tail items

Reports Revamp – Stacked Area Report Type



Reports Revamp – Grouping and Aggregation

Planview PPM Pro PORT - Projects on a Portfolio

Save Save & Run Cancel ↺ ↻

Design

General Data **Display** Variable Settings Team

☐ Display repeated data

Priority	Field	Direction
1	Overall RAG	List Order
2		
3		

Sorting

Aggregation

Field	Aggregation
% Complete	
Budget	Average
Total Cost	Sum
Variance	

☐ Display aggregation totals only

Grand aggregation position:
Show at Top

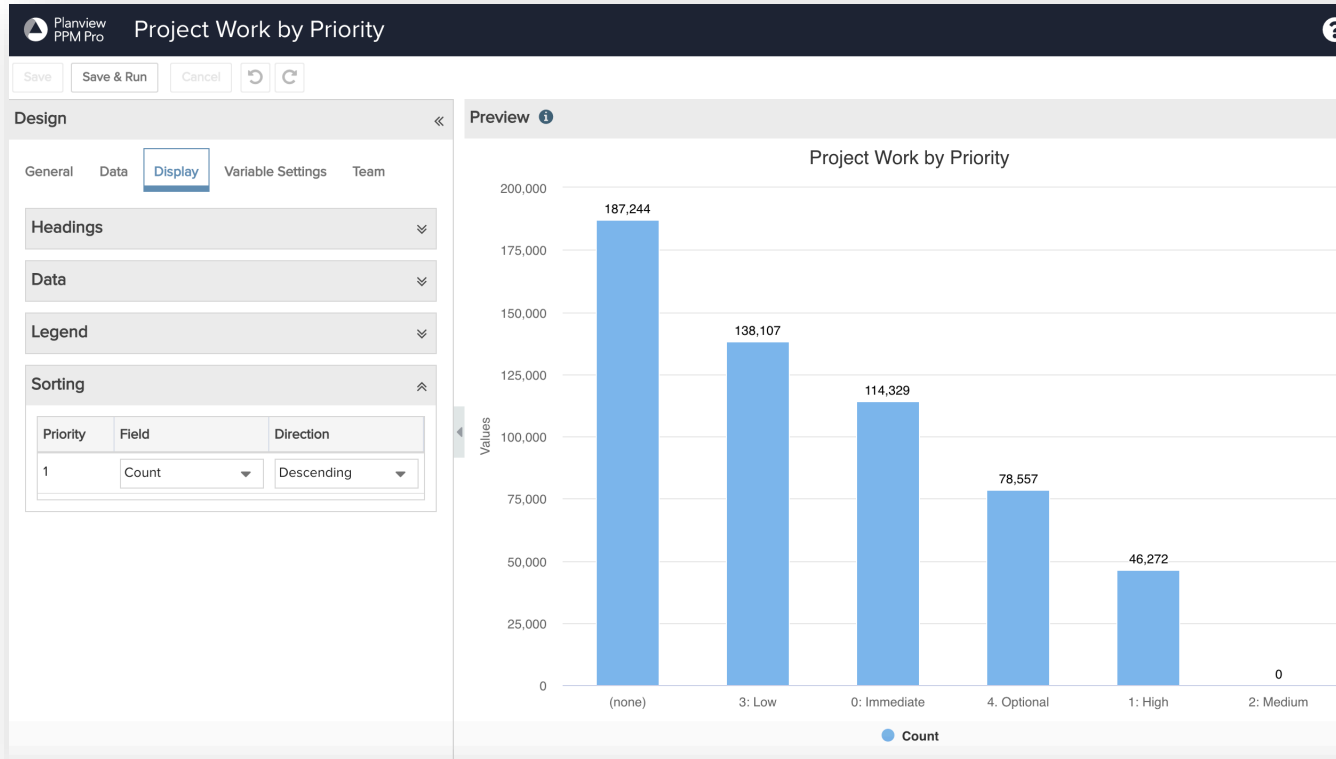
Grand aggregation font: Style: Size:

Preview - Project Details

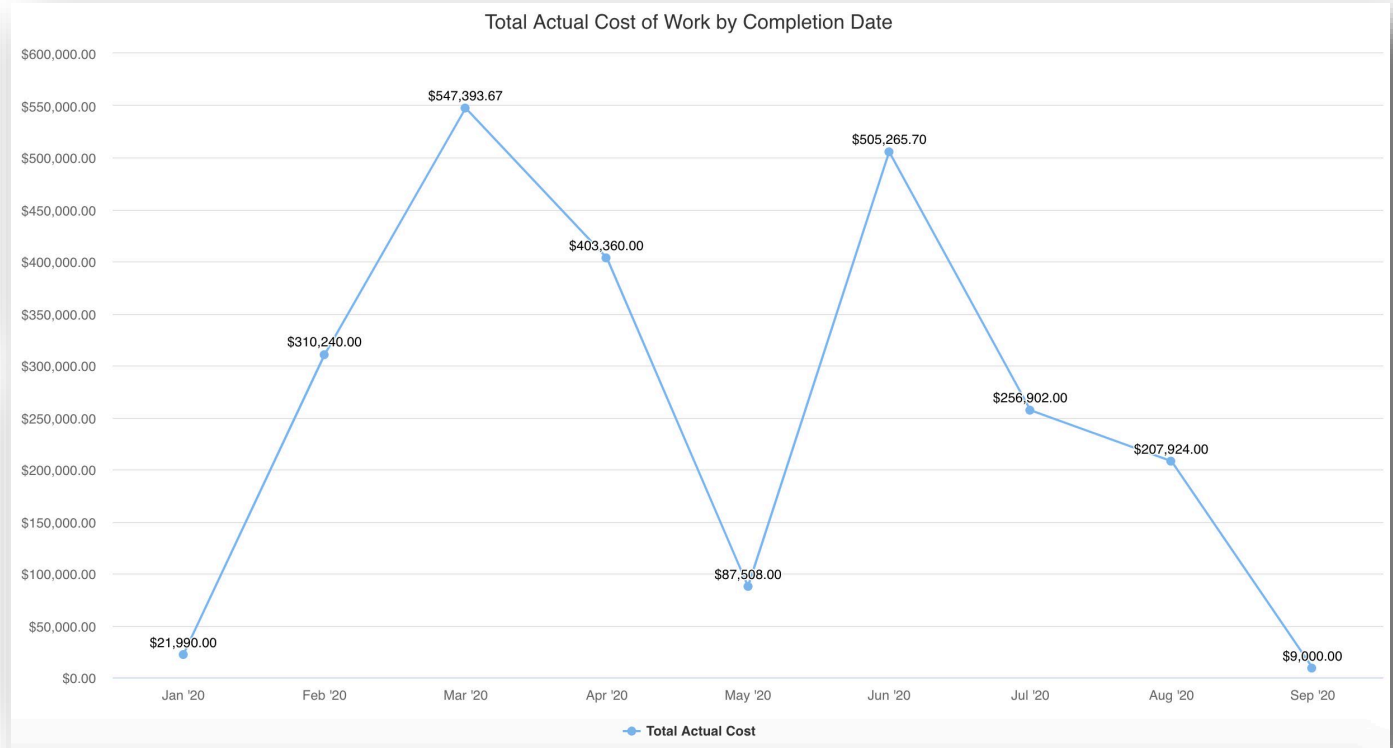
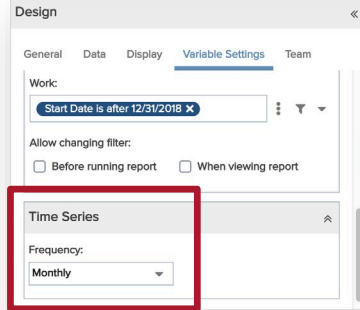
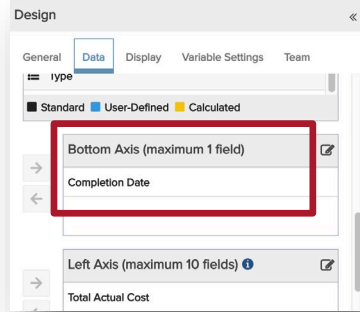
Work:
Filter Work

Title	Priority ↑	Owner	Type	Status	% Compl...	Budget	Total Cost	Variance	Overall RAG
Avg: \$766,3...						\$12,607,434,1...			
Blue									
Work 10010	2: Medium	05, Agile	Maintenance	Canceled	84.90%	\$1,307,948,7...	\$797,916,86...	\$444,678,58...	
Work 10002	4. Optional	Gilling, Tony	Maintenance	Proposed	33.75%	\$347,710,991...	\$480,033,44...	\$156,008,72...	
Work 10003	4. Optional	Megel, Eric	Improvements	Archive		\$1,338,956,6...			
Work 10006	4. Optional	Packebush, Sherrill	Template	Canceled	1.77%	\$1,042,182,13...	\$983,226,54...	\$168,031,46...	
Green									
Work 10016		Garcia, Maritza	Strategic	Archive		\$1,081,986,4...	\$466,583,82...	\$324,258,63...	
Work 10009	1: High	01, Agile	Strategic	Completed	75.66%	\$979,957,21...	\$782,320,89...		
Work 10019	1: High		Compliance	Archive	98.47%			\$743,681,42...	
Amber									
Work 10000	0: Immediate	Canicas, Florian	Compliance	Completed	94.15%	\$240,725,85...	\$798,679,43...	\$1,087,130,12...	
Work 10004	1: High	Packebush, Sherrill	Development	Proposed	5.97%	\$1,177,156,43...	\$342,098,63...	\$1,918,743,75...	
Work 10013	1: High	Jones, Margaret		Canceled	31.93%	\$1,102,336,81...	\$900,997,43...	\$830,186,25...	

Reports Revamp – Sorting



Reports Revamp – Basic Time Series



Reports Revamp – Reports Grid Settings

Planview PPM Pro

Reports (Beta) (33)

Filter Reports (Beta)

Run New Actions

Group By: Type Show: Area: Basic, Area: Stacked, Bar: Basic, Bubble, Column: Basic, Column: ...

Configure Settings

Title	Description	Owner	Scopes
total cost....		Davenport, Mary	

Configure Settings for Reports (Beta)

Select up to 20 fields to display as columns and place them in the order they should appear (the top most field is the left most column). You can also designate some columns to be locked. Selecting fewer fields improves performance.

Available Fields

- Create Date
- Created By
- ID
- Last Modified By

Fields displayed as columns (6 shown, max 20)

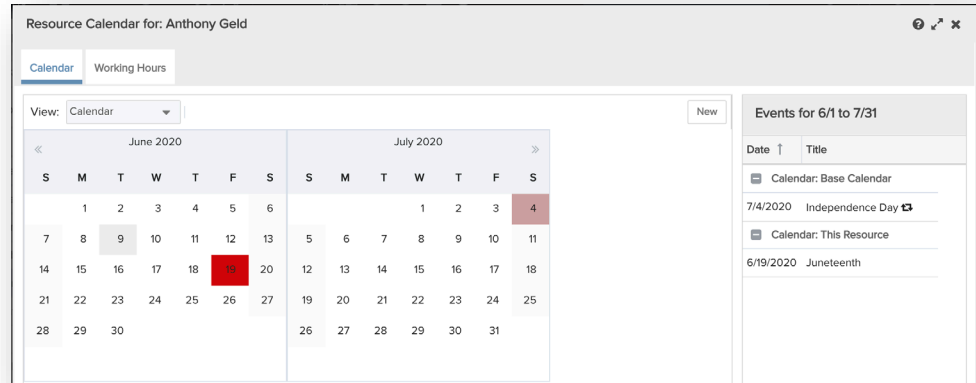
- Title (Locked)
- Description
- Owner
- Scopes
- Topic
- Last Modified Date

Restore Defaults

Save Cancel

Enhancement – Calendar Event API

- Integration to create non-working, whole day calendar events for Base and Resource calendars
- Method: createOrReplaceCalendarEvent
- Ancillary calls: removeCalendarEvents and getCalendarEvents
- Note that if an event already exists on the same date as the new event, the new event will overwrite the existing event



Deprecate Legacy Requests

- 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>

Coming Soon: Financial Summary Beta (target July)

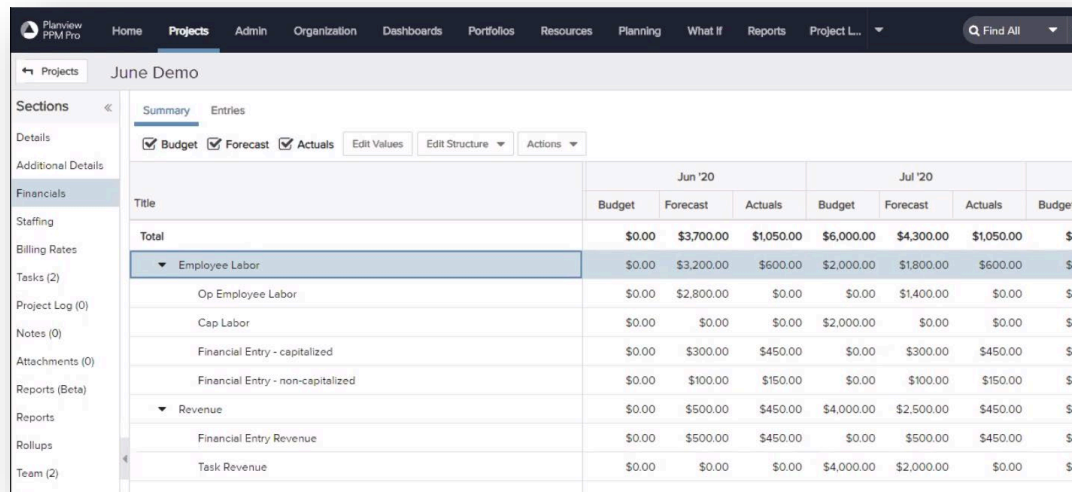
Initial beta:

- Configuration of all project financial feeds (budget, forecast, actuals)

- Project view and permissions

Future releases:

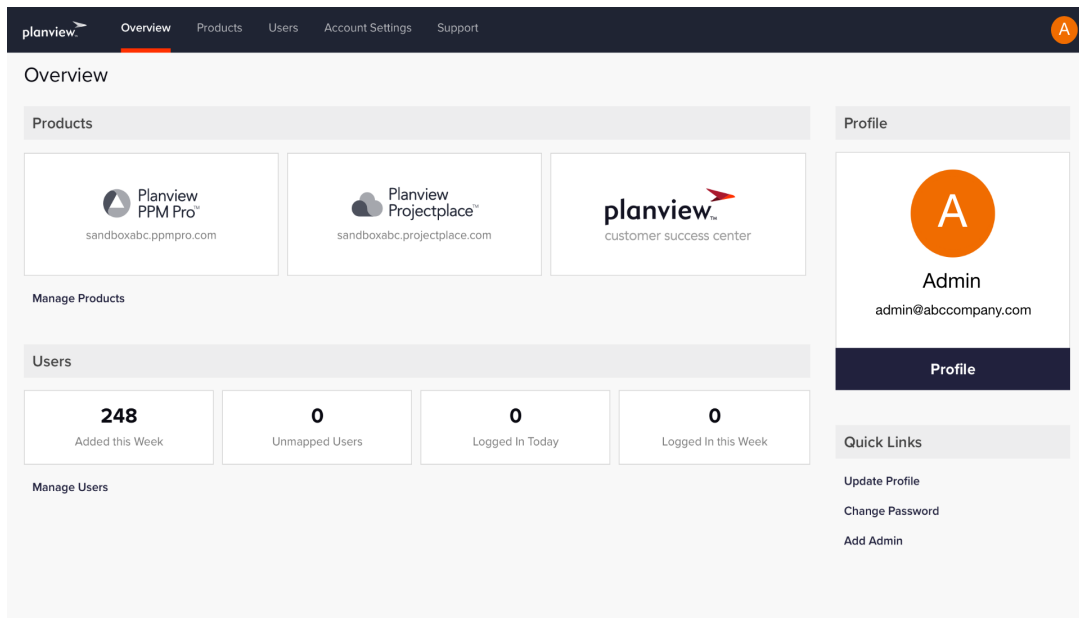
- EAC, ETC, NPV, ROI, EV, PV, AC, BAC, CPI, SPI, TCPI, VAC, CV, SV
- Project templates
- View options (i.e., time frequency)
- Rollups to portfolio and reports
- Baselines



The screenshot displays the Planview PPM Pro interface for a project named "June Demo". The "Financials" section is active, showing a summary table with columns for Budget, Forecast, and Actuals for June and July 2020. The table includes a "Total" row and a "Revenue" section with sub-items like "Op Employee Labor", "Cap Labor", "Financial Entry - capitalized", "Financial Entry - non-capitalized", "Revenue", "Financial Entry Revenue", and "Task Revenue".

Title	Jun '20			Jul '20			Budget
	Budget	Forecast	Actuals	Budget	Forecast	Actuals	
Total	\$0.00	\$3,700.00	\$1,050.00	\$6,000.00	\$4,300.00	\$1,050.00	\$0.00
Employee Labor	\$0.00	\$3,200.00	\$600.00	\$2,000.00	\$1,800.00	\$600.00	\$0.00
Op Employee Labor	\$0.00	\$2,800.00	\$0.00	\$0.00	\$1,400.00	\$0.00	\$0.00
Cap Labor	\$0.00	\$0.00	\$0.00	\$2,000.00	\$0.00	\$0.00	\$0.00
Financial Entry - capitalized	\$0.00	\$300.00	\$450.00	\$0.00	\$300.00	\$450.00	\$0.00
Financial Entry - non-capitalized	\$0.00	\$100.00	\$150.00	\$0.00	\$100.00	\$150.00	\$0.00
Revenue	\$0.00	\$500.00	\$450.00	\$4,000.00	\$2,500.00	\$450.00	\$0.00
Financial Entry Revenue	\$0.00	\$500.00	\$450.00	\$0.00	\$500.00	\$450.00	\$0.00
Task Revenue	\$0.00	\$0.00	\$0.00	\$4,000.00	\$2,000.00	\$0.00	\$0.00

Coming Soon: Planview ID Phased Rollout



- A centralized user management experience for an organization's administrators to view and manage users' access across Planview products
- Users will be able to login to multiple Planview products with a single username and password
- Contact jhigh@planview.com for more info

Virtual Planview Horizons Customer Conference 2020



\$249 until June 26!

\$299 after June 26

Discounted group rates available

www.PlanviewHorizons.com



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

- July Release Webinar July 15
- Register for all webinars in advance!
- <https://success.planview.com/Planview PPM Pro/Release Information/Customer Webinars>

PRODUCT RELEASES

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 | [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 | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)
5/13/2020: May Release | [View PDF](#) | [View Presentation](#)
5/27/2020: Q2 Roadmap | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)
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