

# PPM Pro Customer Webinar: July 2020 Release

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# 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





### Monthly Release Schedule



#### More Nimble (faster cadence) Release Schedule

- Pillars of the release still first, second, and third Fridays
- Goal: get WORKING FEATURES to customers FASTER
  - Release updates outside of three week cycle to deliver new functionality
- Approach: Try this out with Reports (Beta) for example:
  - First wave of drilldown capabilities delivered 3<sup>rd</sup> Friday
  - As drilldown support added to remaining report types (Bubble, Crosstab), release when ready (still on a Friday during update window)
  - Include essential, low-risk fixes when possible



#### **Current Month's Feature Status**



Reports Revamp (rolling) Financial Summary (rolling)





## Enhancement – Timesheet Limited to Working Hours

Limit the number of hours a user can enter daily to a timesheet to the working hours of the resource calendar (ignoring events)

- New Admin/Organization/Timesheet Settings "Allow timesheet hours to be limited to working hours"
- New User property "Limit timesheet hours to working hours"

Include Work Managers in approval pro	coss for time	. A	
include work managers in approval pro	cess for this	•••	
Automatically approve 0 🌲 c	lays after su	bmissio	n 🛈
Allow cost normalization on timesheets	0		
Allow maximum hours logged per week	to be limite	ed 🚺	
Allow timesheet hours to be limited to		rs 🕄	Allowing the timesheet hours to be limited to working hours adds a new field to the
Allow timesheet hours to be limited to v	working hou	rs 🕄	Allowing the timesheet hours to be limite to working hours adds a new field to the user records called Limit timesheet hours to working hours. This new field can be
Allow timesheet hours to be limited to v	48 AB hours	rs () t s after t urs afte	to working hours adds a new field to the user records called Limit timesheet hours

Geld, Anthony		»		
Save Save & Add to G	roups Cancel Actions 👻	:		
Resource*	Geld, Anthony			
Login*	admindemo			
User Type*	Full User	•		
Timesheet Activation Date	12/1/2015			
Active				
Admin?				
Change Password				
Confirm Password				
Limit timesheet hours to working hours				
Password Modified Date	12/19/2018			

Hours Exceeded	×
Daily hours exceeded on 7/6. Max hours/day	v = 8.0.
Close	



# 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
- Reports grid Settings
- Basic time series date ranges
  - Initial drilldown

•

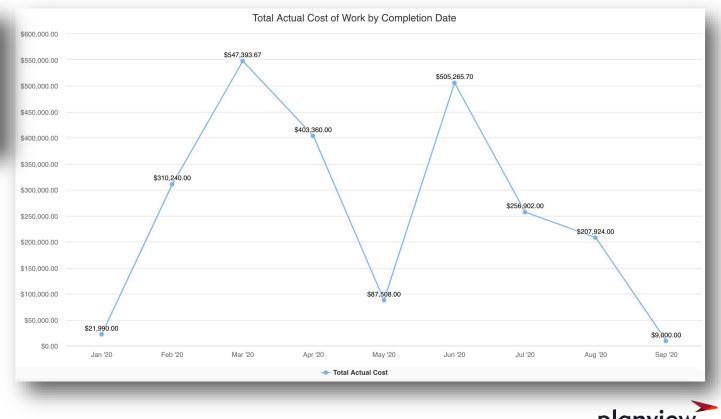
- Report drilldown
- WYSIWYG dashboard designer
- Home and project
   Overview dashboards
- Reports with time series/contoured data (staffing/resource planning, Audit, KPI, etc.)
- Portfolios and subportfolios reports
- Remaining reports and dashboard PPT, PDF, and/or Excel export

- Future Releases
  - 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 – Basic Time Series (Date Ranges)

Time Series					*
Frequency:					
Monthly					-
Date Range:					
is between					-
1/1/2020	曲	and	9/30/2020	曲	
Allow changing:					
Before runnir	ng report	⊡ w	hen viewing report		



### Reports Revamp – Initial Drilldown

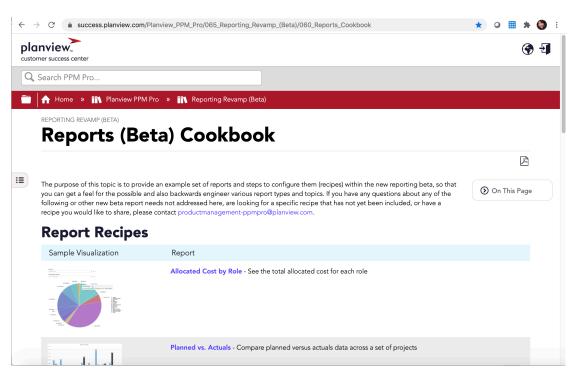
#### Drilldown to entity, report, or "data" for certain Types

Save & Run Cancel "D C"													
n « Preview 🖲				_									
al Data Display Variable Settings Team	Project Logs by Cate	Planview Proj	Provision Project Status										
a v		Design	Cancer D C		"	Preview 0							
yend ∀	1,207				ď	Title	Priority 1	Status	Start Date	Target Date	% Complete	Total Actual Co Ov	Overall RYG
ting *		General Data Dis	play Variable Setting	s Team	14	Project 10002		Completed	26-Jan-2020	09-Jan-2021		\$42.167	
		Headings			*	Project 10009		Completed	22-Dec-2019	03-Nov-2020	10.53%	\$69.985	
l Down 🔶	m A Dril Down ReportDistributed	Grouping *			¥	Project 10010		Canceled	04-Mar-2020	22-Aug-2020	4.31%	<u>\$93103</u>	
Field Drill Down Report/Dashboard					Project 10014		Proposed	16-Jun-2020	27-Oct-2020	9.56%	\$78.691		
ount Data 👻 👻		Sorting			*	Project 10015		Completed	22-Dec-2019	11-Jan-2021		\$71.038	
		Drill Down			*	Project 10000	0: Immediate	Completed	04-Jan-2020	21-Dec-2020	51.85%	\$ <u>47,508</u>	
		Field	Drill Down	Report/Dashboard		Project 10004	0: Immediate	Archive	02-Jan-2020		97.30%		•
	834	Title	Entity	•	-	Project 10007	0: Immediate	Completed	07-Jun-2020	06-Nov-2020			
		Priority			-	Project 10008	0: Immediate	Completed	27-Dec-2019	28-Jul-2020	58.41%		
		Status		•		Project 10013	0: Immediate	Completed	02-Jul-2020	19-Aug-2020	61.49%		
		1,2 Start Date		-	-	Project 10016 Project 10001	0: Immediate 1: High	Archive Completed	13-Jan-2020	17-Oct-2020 27-Jul-2020	75.03%	\$35.107	
	Action Item Change Request Issue	Target Date		-		Project 10005	1: High	Canceled	10-Apr-2020	31-Oct-2020	69.42%		-
	Action item Change Request Sissue	% Complete		-	-	Project 10006	1: High	Hold	15-Mar-2020			\$98.162	
		Total Actual Cost	Report	+ 1 - Project Metri	•	Project 10012	2: Medium	Canceled	03-Jun-2020	22-Oct-2020	6.95%		
		Overall RYG		-	v	Project 10017	2: Medium	Proposed	28-May-2020		43.10%		
						Project 10011	3: Low	Archive	20-Jan-2020	04-Sep-2020		\$77.704	•
		Aggregation ()			*	Project 10018	3: Low	Hold	02-Feb-2020	30-Aug-2020	80.00%	\$3.570	



# Reports Cookbook

- Examples of various reports
- Please send us:
  - Requests for recipes
  - Examples of your favorite recipes
- Will add more as new Topics and Types appear





# Financial Summary – Beta Begins!

#### Initial beta:

- Financial admin
  - Data streams budget, forecast, actuals
  - Summary fields
- Project view
- Permissions

#### Rolling releases:

- Templates
- PMI metrics, NPV, ROI
- Rollups and reporting
- Baselines

← Projects J	une Demo								
Sections «	Summary Entries								
Details	Sudget Structure Values Edit Values Edit Structure Values								
Additional Details			Jun '20			Jul '20			
Financials	Title	Budget	Forecast	Actuals	Budget	Forecast	Actuals	Budget	
Staffing Billing Rates Tasks (2) Project Log (0) Notes (0) Attachments (0) Reports (Beta) Reports Rollups	Total	\$0.00	\$3,700.00	\$1,050.00	\$6,000.00	\$4,300.00	\$1,050.00	\$	
	Employee Labor	\$0.00	\$3,200.00	\$600.00	\$2,000.00	\$1,800.00	\$600.00	\$	
	Op Employee Labor	\$0.00	\$2,800.00	\$0.00	\$0.00	\$1,400.00	\$0.00	\$	
	Cap Labor	\$0.00	\$0.00	\$0.00	\$2,000.00	\$0.00	\$0.00	\$	
	Financial Entry - capitalized	\$0.00	\$300.00	\$450.00	\$0.00	\$300.00	\$450.00	\$	
	Financial Entry - non-capitalized	\$0.00	\$100.00	\$150.00	\$0.00	\$100.00	\$150.00	\$	
	▼ Revenue	\$0.00	\$500.00	\$450.00	\$4,000.00	\$2,500.00	\$450.00	\$	
	Financial Entry Revenue	\$0.00	\$500.00	\$450.00	\$0.00	\$500.00	\$450.00	S	
eam (2)	Task Revenue	\$0.00	\$0.00	\$0.00	\$4,000.00	\$2,000.00	\$0.00	\$	



#### Virtual Planview Horizons Customer Conference 2020



Standard rate \$299 Discounted group rates available <u>www.PlanviewHorizons.com</u>





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!



### **Planview Acquisition News**

- Aptage technology provides insights and visibility into anticipated value and delivery risk across traditional project management and agile methodologies
- Focus through FY2020 is on shaping the Aptage technology into a service to be leveraged across the Planview portfolio
- Currently exploring use cases, sequence and timing for introduction into specific Planview products (including PPM Pro, woot!)
- More information to be unveiled at Horizons 2020

Combination Brings Artificial Intelligence and Machine Learning to Agile and PPM to Accelerate Early Insights

July 09, 2020 10:03 AM Eastern Daylight Time

AUSTIN, Texas-(BUSINESS WIRE)-Planview® today announced the acquisition of Aptage, a technology leader and pioneer in the application of Artificial Intelligence (AI) and Machine Learning (ML) to portfolio management and work management.

"Aptage and Planview share a common vision for the future of AI/ML within portfolio management and work management"

y Tweet this

Aplage's expertise in data astence is combined with unique domain knowledge in the concentries of development spanning Apla and project methodologies. The company is technology and IP is focused on the application of ANU, to enterprise admixer, effeting customers early insights and visibility into anticipated value and delivery triak across traditional project management and agile methodologies. For Planview customers, this utilitative jimas more accurate project doctare forecasting, regardless of work methodologies and processes used to get work done.

In locity disruptive environment, the companies with early insights are the ones that can phort more quickly to create competitive advantage," said Creat Ginnore, ECO of Pankew. "Aplages Pankew The Aplage Statistics and the Aplage Into the Plankew and delivery risk, improving and steengthening the strategy to delivery pipeline. We're excited to veicome Aplage Into the Plankew family and bring this expertise to our costomers."

"Aptage and Planview share a common vision for the future of AVML within portfolio management and work management," said John Heintz, co-founder and CEO of Aptage. "We're thrilled to be taking this next step together, expanding the reach of our technology and driving better outcomes for organizations."

Founded in 2016, Aptage's proprietary IP was designed to accommodate the small data characteristics of Agile and traditional



# **Upcoming Webinars/Events**

- August Release Webinar August 19
- Q3 Roadmap Webinar August 26
- Register for all webinars in advance!
- <u>https://success.planview.com/Planview\_PPM\_Pro/Release\_Information/Customer\_Webinars</u>

#### PRODUCT RELEASES Planview PPM Pro Customer Webinars

Page restriction: Public

#### <u>2020</u>

 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 | 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 | → View PDF | → View Presentation

 7/15/2020: July Release | Register

 8/126/2020: Q3 Roadmap | Register

 9/16/2020: September Release | Register

 10/14/2020: October Release | Register

 11/18/2020: November Release | Register





#### Q&A

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# Thank You

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