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

First Friday	• Release Notes Published
Second Friday	• Release deployed to sandbox environments
Third Friday	• Release deployed to production environments

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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 3rd 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

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Current Month's Feature Status

Beta

Reports Revamp (rolling)
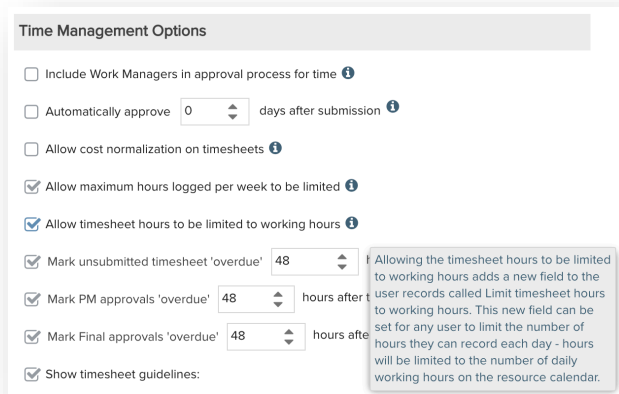
Financial Summary (rolling)

GA

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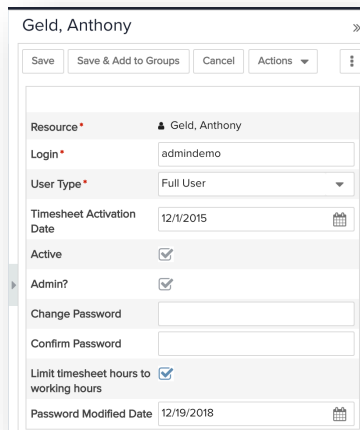
- New Admin/Organization/Timesheet Settings "Allow timesheet hours to be limited to working hours"
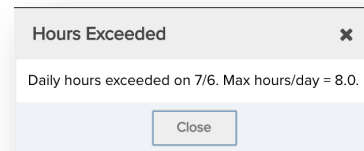
- New User property "Limit timesheet hours to working hours"

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

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

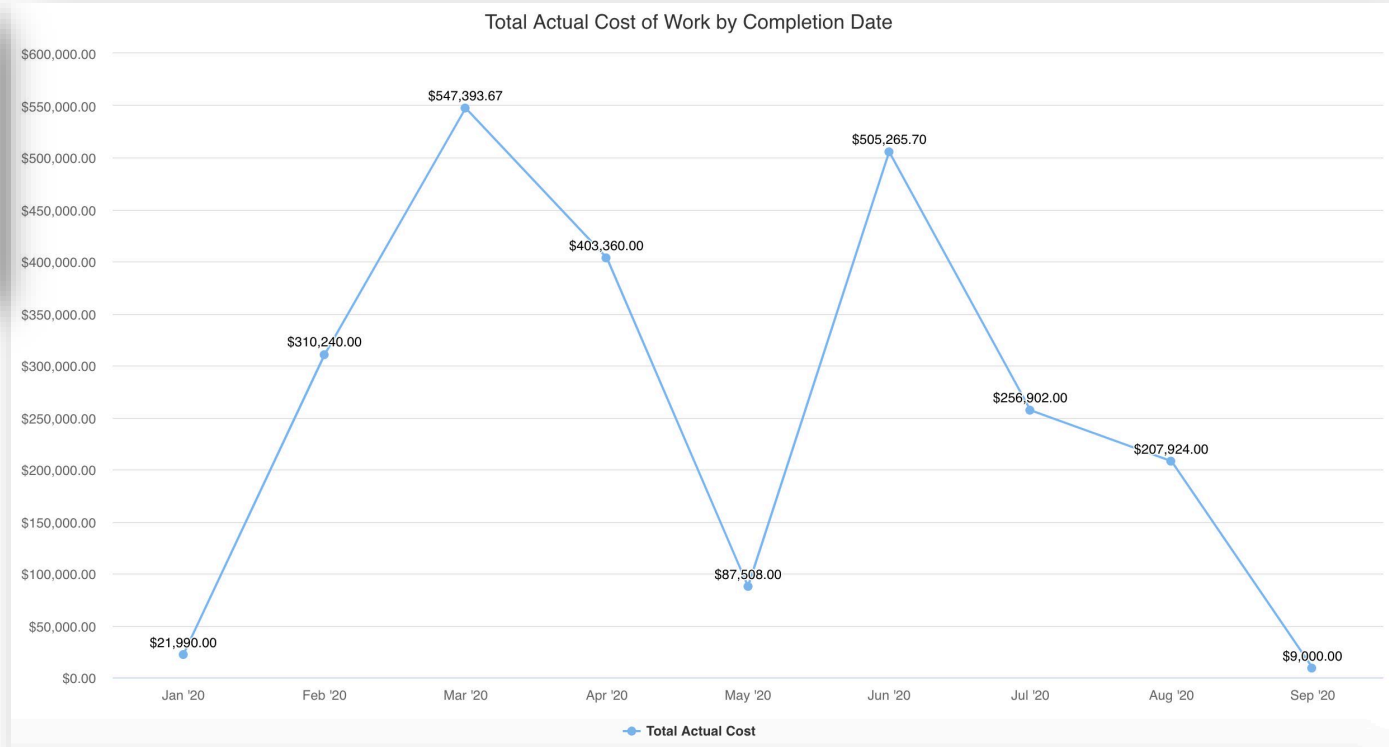planview™

Reports Revamp – Basic Time Series (Date Ranges)

Time Series ⌃

Frequency:
Monthly ▾

Date Range:
is between ▾

1/1/2020 📅 and 9/30/2020 📅

Allow changing:
☐ Before running report   ☑ When viewing report

Total Actual Cost of Work by Completion Date

- Jan '20: $21,990.00
- Feb '20: $310,240.00
- Mar '20: $547,393.67
- Apr '20: $403,360.00
- May '20: $87,508.00
- Jun '20: $505,265.70
- Jul '20: $256,902.00
- Aug '20: $207,924.00
- Sep '20: $9,000.00

◆ Total Actual Cost

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Reports Revamp – Initial Drilldown

Drilldown to entity, report, or "data" for certain Types
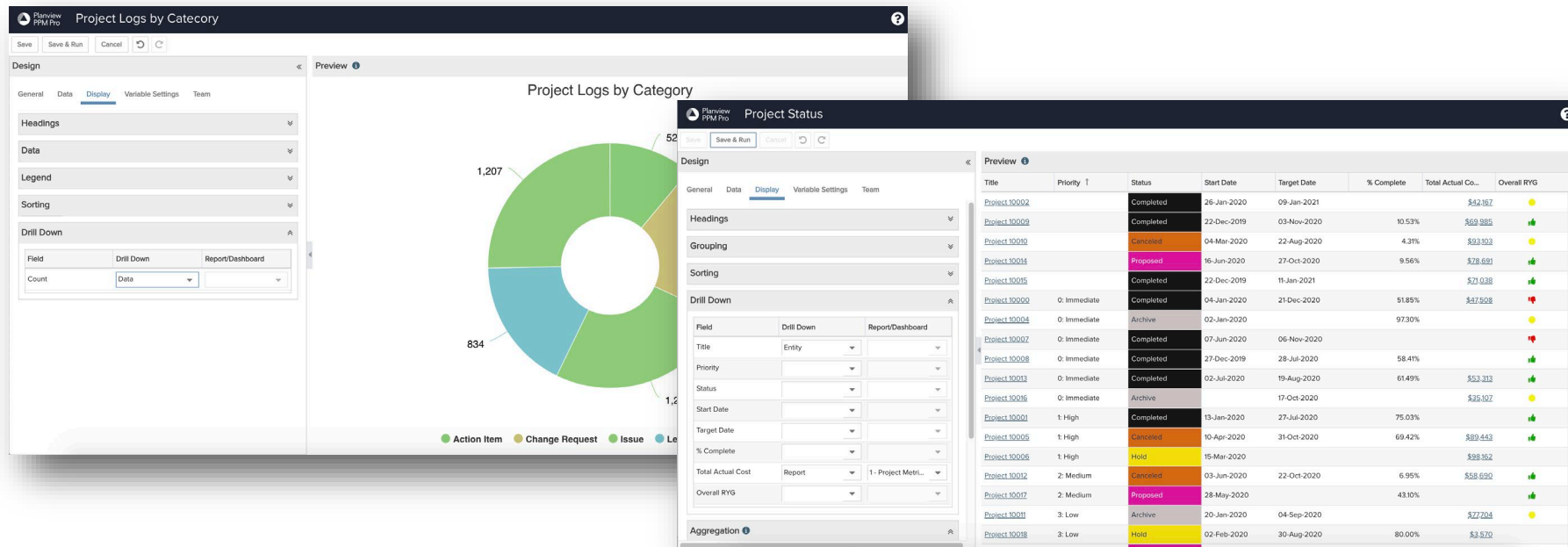
Reports Cookbook

- 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

Virtual Planview Horizons Customer Conference 2020

Standard rate $299
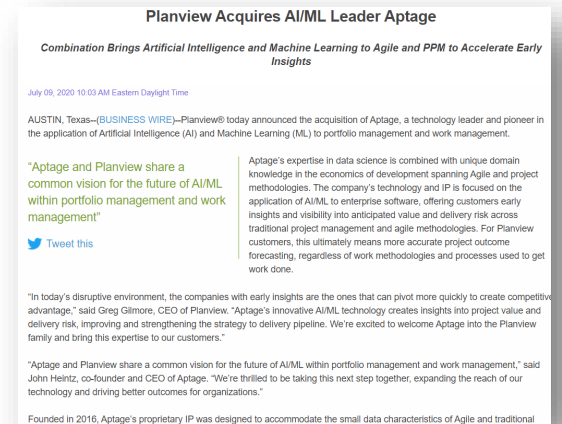*Discounted group rates available*
www.PlanviewHorizons.com

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!

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

Planview Acquires AI/ML Leader Aptage

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"

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Aptage's expertise in data science is combined with unique domain knowledge in the economics of development spanning Agile and project methodologies. The company's technology and IP is focused on the application of AI/ML to enterprise software, offering customers early insights and visibility into anticipated value and delivery risk across traditional project management and agile methodologies. For Planview customers, this ultimately means more accurate project outcome forecasting, regardless of work methodologies and processes used to get work done.

"In today's disruptive environment, the companies with early insights are the ones that can pivot more quickly to create competitive advantage," said Greg Gilmore, CEO of Planview. "Aptage's innovative AI/ML technology creates insights into project value and delivery risk, improving and strengthening the strategy to delivery pipeline. We're excited to welcome Aptage into the Planview family and bring this expertise to our customers."

"Aptage and Planview share a common vision for the future of AI/ML 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!
- 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 | View PDF | View Presentation
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

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Q&A

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Thank You