

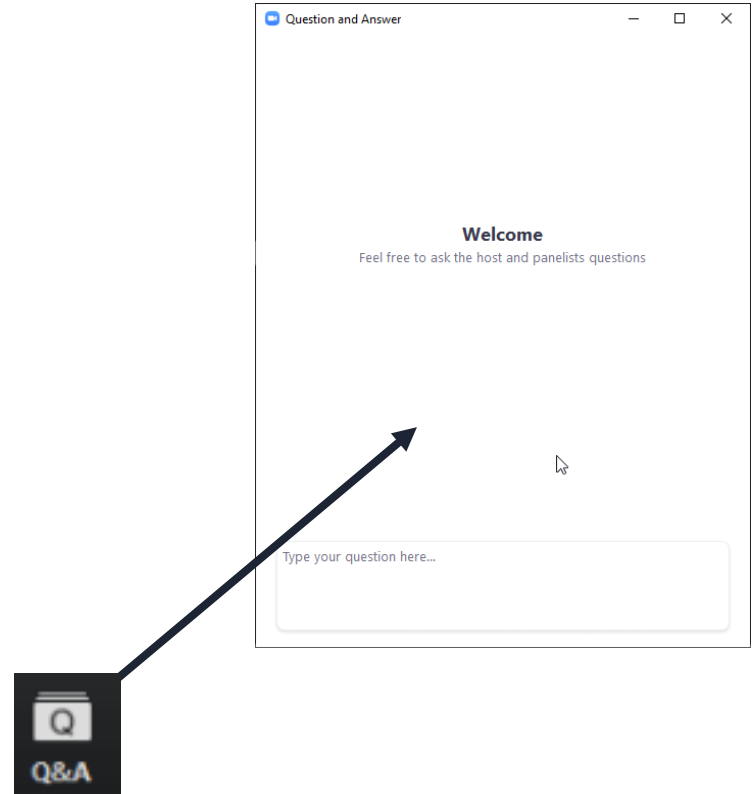


PPM Pro Customer Webinar: August 2020 Release

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



Current Month's Feature Status



Beta

Reports Revamp (rolling)
Dashboards Revamp (rolling)
Financial Summary (rolling)



GA

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
- Drilldown to Data from Crosstab type
- Drilldown to Dashboard from List, Gantt, Bubble types
- Small enhancements such as M and k money display

Future Releases

- Portfolios and sub-portfolios reports
- Reports with time series/contoured data (staffing/resource planning, financial planning)
- Remaining reports and dashboard PPT, PDF, and/or Excel export
- Report topics for KPI, Audit, Timesheet Summary, Baselines
- Capacity and demand report
- Calc fields for secondary entities
- Additional report types and tail items

Reports Revamp – Drilldown to Data

From Crosstab type

Planview PPM Pro Time by Project -> Task -> Resource

Save Save & Run Cancel ↺ ↻

Design

General Data **Display** Variable Settings Team

Row subtotals position:
Show at Top

Column grand totals position:
Show at Right

Column subtotals position:
Show at Right

Layout type:
Outline

Show zero as blank:

Drill Down

Field Data Report/Dashboard

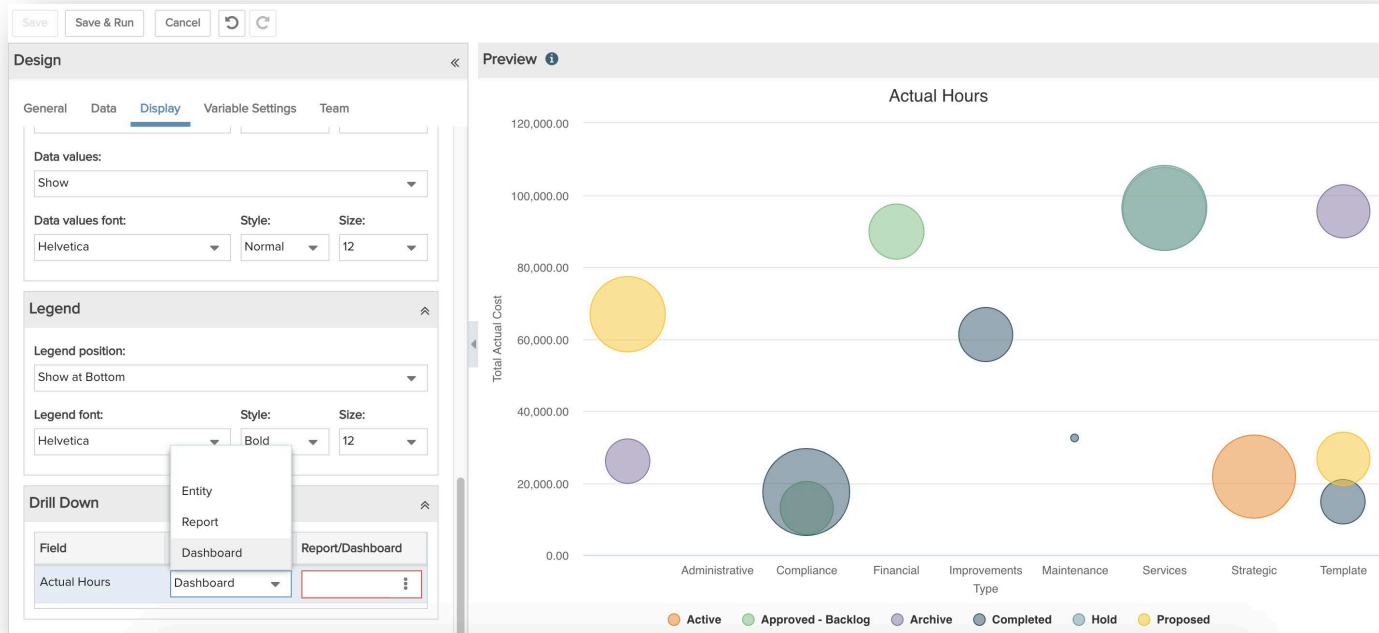
Total Hours Data

Preview

Work	Task/Feature I...	Resource	May '20	Jun '20	Jul '20	Aug '20	Sep '20	Oct '20	To
(none)			0.00	0.00	2,229.90	4,999.92			
	Task/Feature 10020				2,229.90				
	T pharetra silt ...				2,229.90				
	Task/Feature 10022		0.00						
	Enim ut sem. ...		0.00						
	Task/Feature ...								
	Task/Feature 10028			0.00					
	Inar			0.00					
	Task/Feature 10033					4,999.92			
	Ullamcorper a...					4,999.92			
	Task/Feature 10034								
	Ue senectus ...								
	01 - AI for Transaction Settlement							6,221.40	
	Task/Feature ...							6,221.40	
	08 - Digital Banking Module								
	Task/Feature 10038								

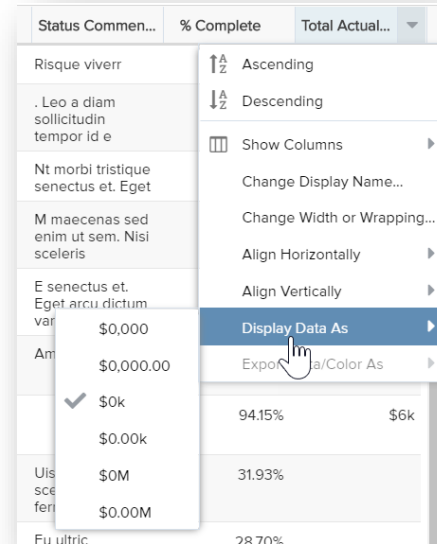
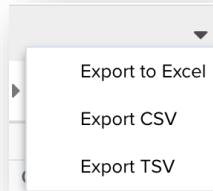
Reports Revamp – Drilldown to Dashboard

From List, Gantt, and Bubble types



Reports Revamp – Small Enhancements

- Gantt export xls, csv, tsv
- Display money in thousands (k) or millions (M)



Dashboards Revamp – Rolling Beta

Current Beta Functionality

- New Dashboards grid with Group By
- WYSIWYG dashboard designer, with ability to drag and drop or click “Add” button to add a report to the dashboard
- Scope tab with ability to specify what entity dashboard grids the dashboard shows up on
- Preview - able to move reports around, resize, and remove
- Variable properties on report components to adjust filters
- Permissions – top level navigation, entity level based on Legacy entity dashboard permissions

Future Releases

- Home and project Overview section dashboards
- Dashboard publishing and expiration handling
- Dashboard notification customizable text link
- Access to previously published dashboards
- Rich text/image content (for example, company logo)
- Tail items

Financial Summary – Rolling Beta

Current Beta Functionality

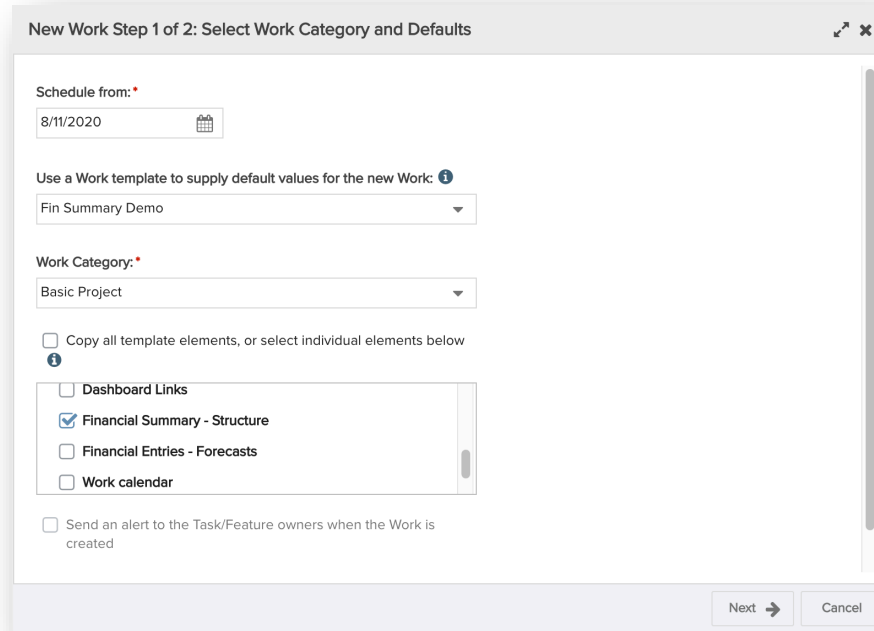
- Financial admin
 - Data streams - budget, forecast, actuals
 - Summary fields
- Project view
- Permissions
- Copy Financial Summary Structure from a template project

Future Releases

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

Financial Summary – Template Structures

Ability to copy Financial Summary Structure from a template project



New Work Step 1 of 2: Select Work Category and Defaults

Schedule from: *

8/11/2020

Use a Work template to supply default values for the new Work: ⓘ

Fin Summary Demo

Work Category: *

Basic Project

☐ Copy all template elements, or select individual elements below ⓘ

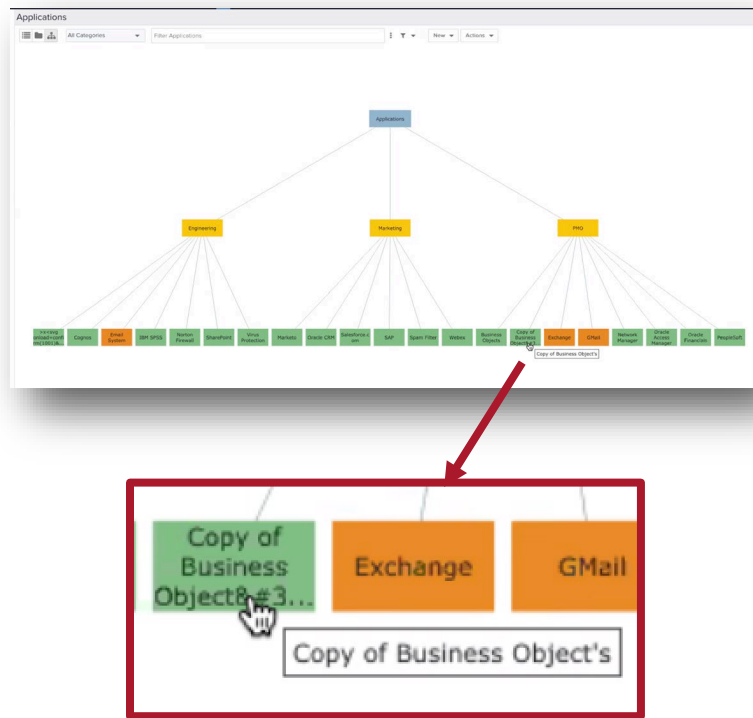
- ☐ Dashboard Links
- ☒ Financial Summary - Structure
- ☐ Financial Entries - Forecasts
- ☐ Work calendar

☐ Send an alert to the Task/Feature owners when the Work is created

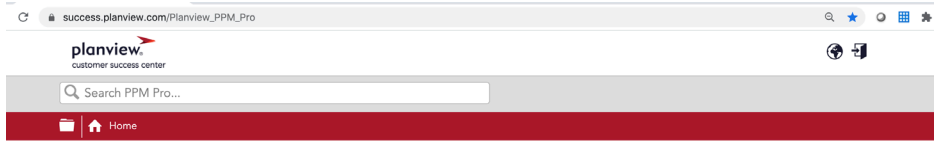
Next → Cancel

Be Aware – Known Changes with Temporary Impacts

- **Portfolio Titles** using special characters will appear with encoding characters in **Chart view** – will be replaced during beta
- **User** report topic removed from reports beta – use Resource topic and fields paths
- **Summary Task** report topic removed from reports beta – in future Task topic will support hierarchy



Reports Training Videos



Reports (Beta)

3 Videos

[View All](#)



Navigating the Reports List View



Report Designer



Adding Fields to Your Report

Horizons PPM Pro Customer Speakers*



- Patients First: How Cepheid Manages Project Portfolios to Provide Key Testing Across the World



- Planting Seeds for Success: Establishing Grass Roots Solutions Across a Global & Diverse Environment



- PPM Excellence: Best Practices for Permissions, Requests, and Dashboards in a Global Environment



- Water for Life: Leveraging Project Portfolio Management to Enhance the Health and Wellbeing of Customers



- Delivering Cutting-Edge Healthcare: Bringing together PPM and Team Delivery to Improve Community Health

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!

Upcoming Webinars/Events

- Q3 Roadmap Webinar August 26
- September Release Webinar September 17 – NOTE new date of Thursday!
- Register for all webinars in advance!
- <https://success.planview.com/Planview PPM Pro/Release Information/Customer Webinars>

PRODUCT RELEASES

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 | [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 | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)
8/19/2020: August Release | [Register](#)
8/26/2020: Q3 Roadmap | [Register](#)
9/17/2020: September Release | [Register](#)
10/14/2020: October Release | [Register](#)
11/18/2020: November Release | [Register](#)

Q&A

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Thank You