

Planview PPM Pro – Product Roadmap 2020 Q3 to 2021 Q2

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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





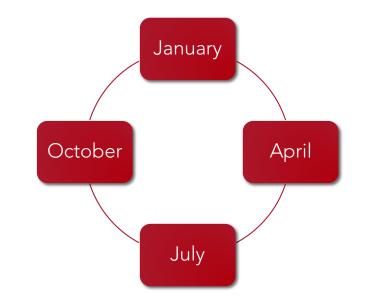
Disclaimer

- 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

- Weekly/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





Q320-Q221 Roadmap Focus

- Reporting 2.0 (in beta)
 - High level Task Timeline ${f V}$
 - Gantt Phases and Milestones ${ar Y}$
- Financial Summary (in beta)
 - Negative Financial Entries
- Planview ID (in early access)
- Iterative Work Management v1
 - LeanKit & Projectplace Int v2

- Resource Self Service Admin (SSA)
- Dependent Field Logic
- User/Group/Unit Field Restrictions
- Spreadsheet Editor SSA Entities Σ
- Archiving Projects Σ
- Alerts 2.0



🕎 - 2019 Customer Spigit challenge winner

Reporting 2.0/Dashboards 2.0 (in Beta)

Recently added to current beta:

- Export reports to PowerPoint
- Grouping, Sorting, Aggregation
- Basic Time Series
- Drilldown
- Initial Dashboard

Up next in rolling releases:

- Dashboard Home and Project Overview sections
- Portfolio/sub-Portfolio (hierarchies)
- Planning and other Time Series





High-Level Task Timeline 🏆

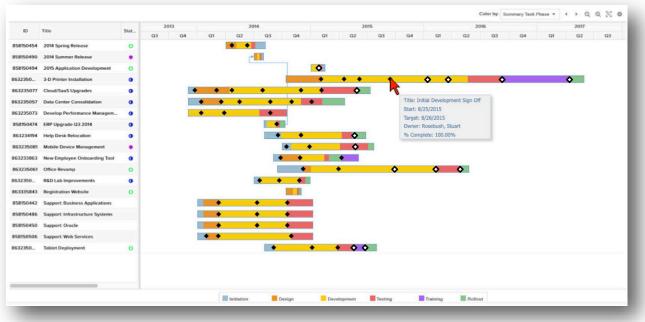
Option to show key tasks on a high-level timeline that can be shown above Tasks grid

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planv



Ability to show Milestone tasks and Phases on Project Gantt bars





Financial Summary (in Beta)

Planview PPM Pro*	Hor	ne Issues/Risks Project O	rganization Adn	nin 🔻	٩	Find All 🔻 T	ype Keyword, ID, o	or Name		0	• • •	()
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Current beta:

- Financial admin
- Project view
- Permissions
- Templates

Up next in rolling releases:

- EAC, ETC, NPV, ROI, EV, PV, AC, BAC, CPI, SPI, TCPI, VAC, CV, SV
- Rollups and reporting
- Baselines



Negative Financial Entries

Allow negative entries on Financial Forecasts and Actuals

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Planview ID (in early access)

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Overview						
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Users					Profile	
248 Added this Week	O Unmapped Users	O Logged In Today	у	O Logged In this Week	Quick Links	
Manage Users					Update Profile Change Password Add Admin	

- 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

- v1: Time-independent work items, optional:
 - Start date
 - Target date
 - Duration
- v2: Task Backlog

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	4	UI Grid view	High		19 days	18		•	September	2	9/3/2018 9:00 AM	9/28/2018 5:00 PM		Task
	4	Ad hoc filter	High			12			New SSA ent	2.1				Story
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	10	Entity report se	o High		25 days				October	3	10/1/2018 9:00 AM	11/2/2018 5:00 PM		Task
	6	Data Import	High						November	4	11/5/2018 9:00 AM			Task
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Integrations: LeanKit v2

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- 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

Projects MCW

Notes (1) Attachments (C Reports Dashboards Associations (C Team (1)

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Resource SSA (Self-Service Admin)

Sections «		People Details					
Organization Permission Profiles Users		Category: Contractor		•			
Groups Setup Offices/Regions Calendars Lookup Lists		Available Fields Type to Find Available Field Active Alternate for Transheet Approve		Details Move Up ♠ Move Down ↓ First Name • Last Name •	Field: First Name Save Cancel Restrictions		*
Skills All Entities People Available Fields		Silling Rate	Last Name * Unit * Primary Role * Today's Internal Rate	Field Access Unrestricted - This field can be seen an used by anyone Common Properties Method ID 100442		/or	
Categories Details <u>Additional Details</u>	4	Created By Department Description	*	Capacity Multiplier Email Disable Alerts	Title Field Origin Description	First Name Standard Person's first name.	
User Definis Grid Columns Searchable Fields		Division Effective Base Calendar Enterprise	*		Field Type Details Display Name	String	
Filters Trend Fields Scoring Publishing		Full Admin Hire Date			Variable Properties (Required () Default Value		*
Scheduled Jobs Data Import Web Services API		Group Header: 1	>		Show on New Show on Edit	Yes 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

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uester*	≜ Entrekin, Caleb	Requester*	å Entre
efits		Benefits	
ntial Business e †	1	▼ Potential Busines Value †	High
e Date	High	Business Objecti	tive
	Medium Will brign great things to the company	Create Date	2/5/2019
	Low		

DIGNVIEW



Add Users, Groups, and Units to the "Restrict to" field*

				×
Restrict to:		Selected:		0
Groups	*		:	
Groups				
Units				
User type				
Users				
(everyone else)				

Type: 🔘 User	Group	O Unit	
Search by			Search
Select Group:			
Group	Descriptio	n	
Admin	Members	can access the Admin tab, wh	ere they
Analysts			
Arch			
Billable Rates	Members	can see all bill rate, billable ar	mount, pr
Capacity & Demand	Members	have access to the Capacity &	& Demand

*Likely part of Dependent Field Logic



Spreadsheet Editor – SSA Entities Σ

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

Projects (113)									
Project	▼ Filter Pr	ojects					1	τ.	Open New Actions 🕶 🖾 🖨 🌉 🌣
									Color by: None Spreadsheet Editor (Ctrl + Shift + Alt + S)
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INPD Medium IT P	X X	3/2/2015	Project	6/29/2015	Proposed	2:	Pro	2/17/20	0 NPD Medium IT Project
AssignStickyRes		9/22/2014	Project	10/19/2014	Approve		Pro	9/18/20	AssignStickyResourcesScenario2P0
AssignStickyRes		9/22/2014	Project	9/28/2014	Approve		Pro	9/18/20	0 AssignStickyResourcesScenario1P2
AssignStickyRes		9/22/2014	Project	10/5/2014	Approve		Pro	9/18/20	AssignStickyResourcesScenario1P1
CASSIGNStickyRes		9/22/2014	Project	10/12/2014	Approve		Pro	9/18/20	AssignStickyResourcesScenario1P0
AllocateHighValu		9/22/2014	Project	9/28/2014	Approve		Pro	9/18/20	0 AllocateHighValueFloatersScenario2P6
AllocateHighValu		9/22/2014	Project	9/28/2014	Approve		Pro	9/18/20	0 AllocateHighValueFloatersScenario2P5
Select Benefits R	Ö	4/1/2015	Project	11/6/2015	Approve	3: L	Pro	9/5/201	01 Select Benefits Release 43.0
Select Benefits R	0	1/12/2015	Project	8/18/2015	Approve	3: L	Pro	9/5/201	Select Benefits Release 42.5
ILAMS 2.0	0	9/5/2014	Project	4/15/2015	Approve	2:	Pro	9/5/201	D1 LAMS 2.0
Report Creation	XO \$	12/10/2014	Project	3/4/2015	Approve	2:	Pro	9/3/201	01 Report Creation
= Mohilo Ann	-	0/2/2014	Dralast	4/12/2015	A	Inc	0	0/2/201	Mobile Ann



Archiving Projects Σ

- "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

Actions 👻 🖹 🖨	
Open in New Tab	-
Bulk Edit	
Bulk Add Team Member	
Bulk Remove Team Member	
Select All	(Ctrl + A)
Copy Rows to Clipboard	(Alt + C)
Copy URL	
Export to Excel	
Archive Project	
Restore Archived Project	
Delete	(Del)
View People with Permissions on this Entity	
Impact Analysis	
Open in Projectplace	



Alerts 2.0

- Easier, centralized management of alerts
- Customizable triggers
- Agnostic: email, SMS, browser notifications

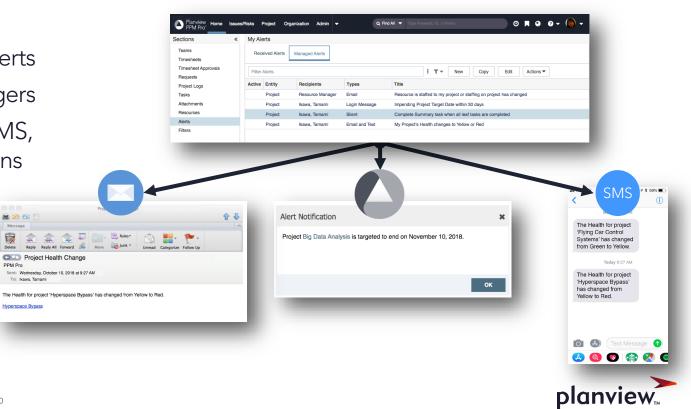
Message

1

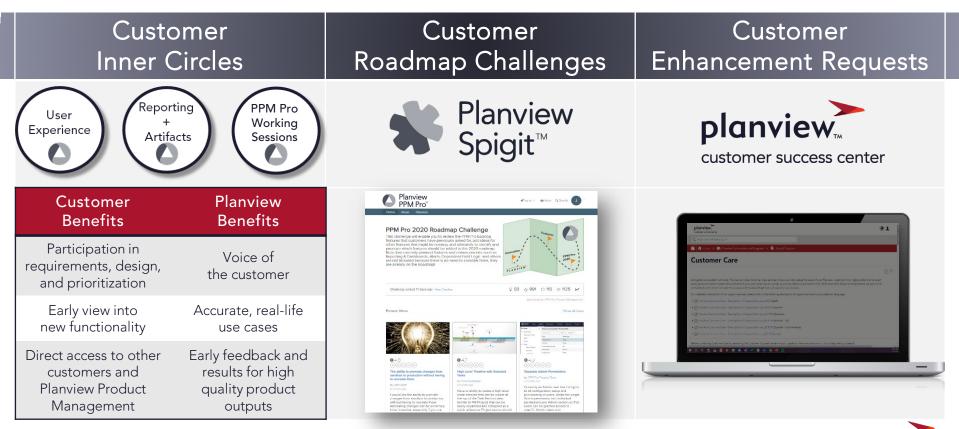
Delete

PPM Pro

- Advanced logic
- Alert resolution



Customer Driven Product









Thank You

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