



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

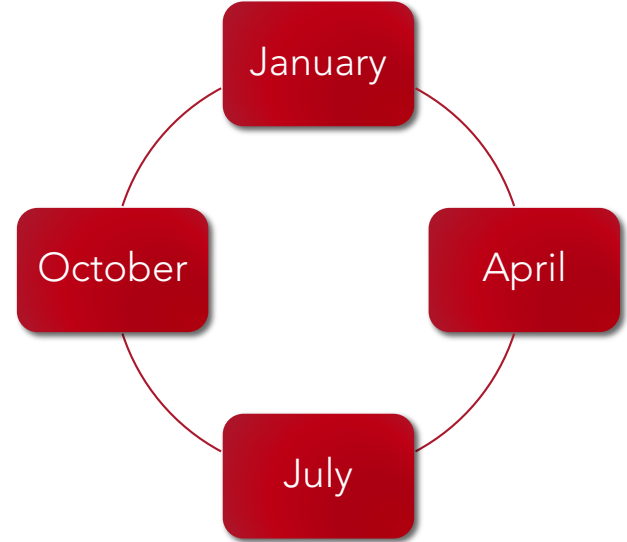


Disclaimer






- 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 
 - Gantt Phases and Milestones 
- **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 
- Archiving Projects 
- Alerts 2.0

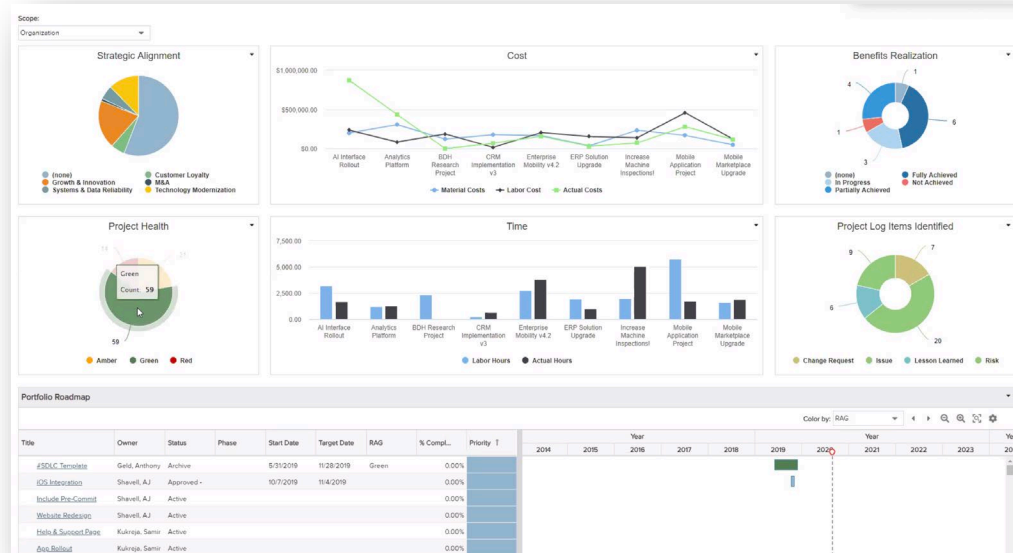
Reporting 2.0/Dashboards 2.0 (in Beta)

Recently added to current beta:

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

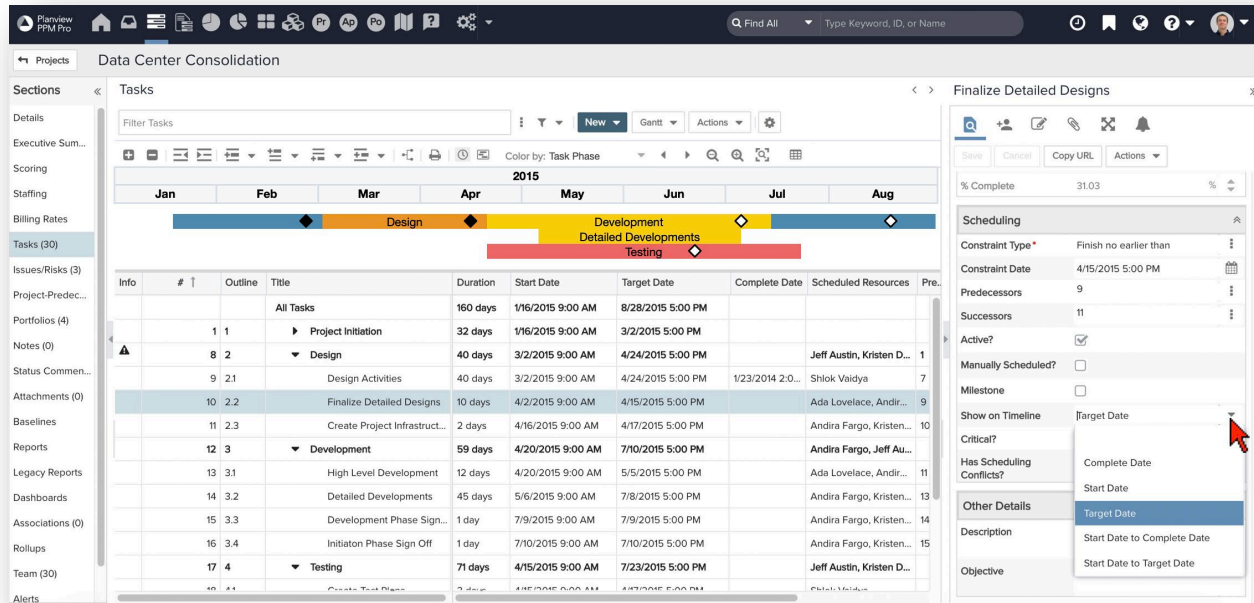
Up next in rolling releases:

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



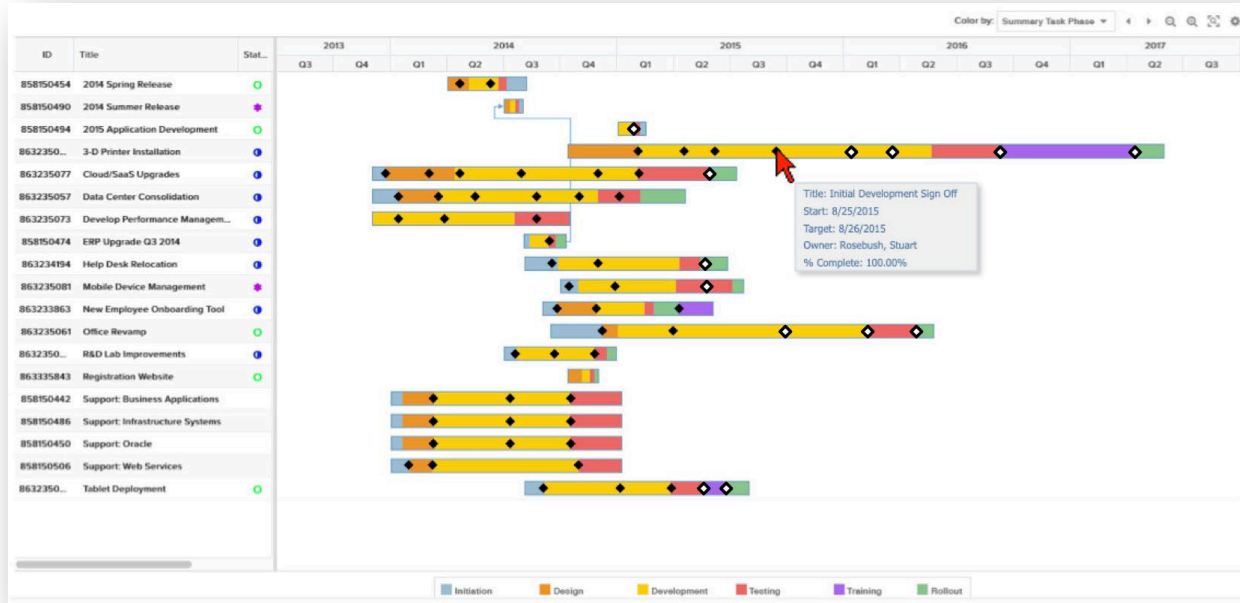
High-Level Task Timeline

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



Gantt Phases and Milestones

Ability to show Milestone tasks and Phases on Project Gantt bars



Financial Summary (in Beta)

Planview PPM Pro

Home Issues/Risks Project Organization Admin

Find All Type Keyword, ID, or Name

Projects Flying Car Control System

Sections Financials

Details

Executive Summary

Financials

Staffing

Tasks (28)

Project Logs (5)

Project-Predec...

Portfolios (1)

Notes (0)

Status Comm...

Attachments (0)

Baselines

Reports

Dashboards

Associations (2)

Team (19)

Alerts

Settings

Summary Financial Entries

Budget Forecast Actuals Edit Values Edit Structure Actions

Budget: \$ 330,000 NPV: \$ 458,734 ROI: 59.16

Title	Total Forecast	Total Actuals	ETC	EAC	2018					
					August		September		October	
					Forecast	Actuals	Forecast	Actuals	Forecast	Actuals
Total	9,247,000	(70,590)	189,660	318,750	(49,500)	(41,545)	(43,000)	(35,745)	6,500	6,700
Income	9,565,000	58,500			0	0	0	2,500	50,000	56,000
Product Revenue	7,650,000	0			0	0	0	0	0	0
Services	1,915,000	58,500			0	0	0	2,500	50,000	56,000
CapEx	158,000	79,900	78,850	158,750	32,000	25,300	26,000	23,000	26,000	31,600
Labor	127,000	57,100	69,900	127,700	20,000	16,000	20,000	19,600	20,000	21,500
Contractors	14,000	7,600	6,400	14,000	4,000	0	4,000	3,600	4,000	4,000
Employees	113,000	49,500	63,500	113,000	16,000	16,000	16,000	16,000	16,000	17,500
Material	18,000	18,750	0	18,750	10,000	8,450	4,000	2,500	4,000	7,800
Other	13,000	4,050	8,950	13,000	2,000	850	2,000	900	2,000	2,300
OpEx	160,000	49,190	110,810	160,000	17,500	16,245	17,000	15,245	17,500	17,700
Labor	148,000	46,900	101,100	148,000	16,000	16,000	16,000	14,900	16,000	16,000
Material	11,000	1,790	9,210	11,000	1,000	245	1,000	345	1,000	1,200
Other	1,000	500	500	1,000	500	0	0	0	500	500

Current beta:

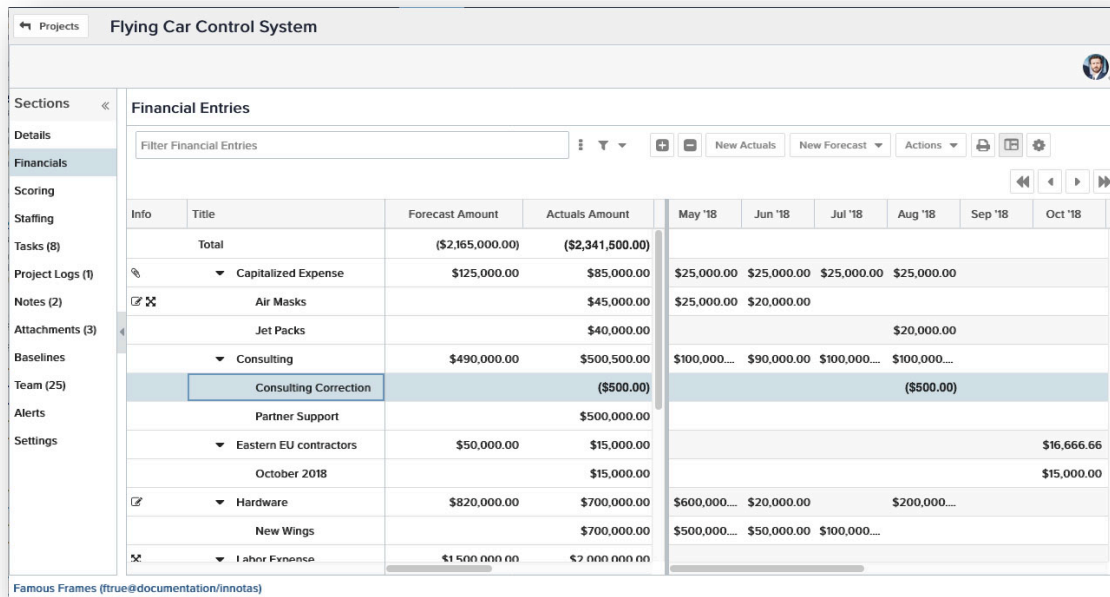
- Financial admin
- Project view
- Permissions
- Templates

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



Projects Flying Car Control System

Sections « Financial Entries

Details

Financials

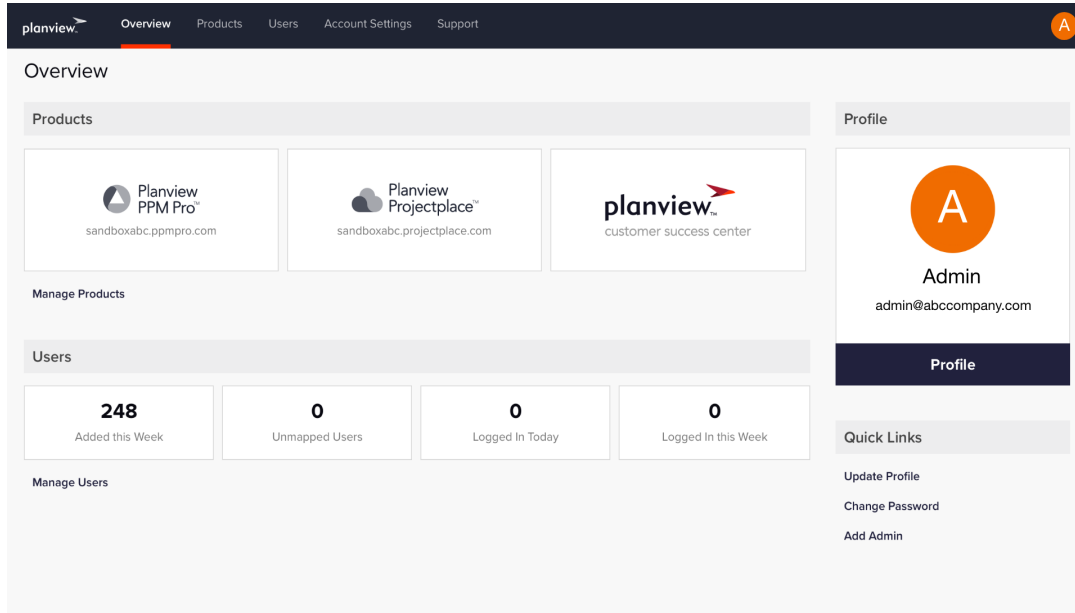
Filter Financial Entries

New Actuals New Forecast Actions

Info	Title	Forecast Amount	Actuals Amount	May '18	Jun '18	Jul '18	Aug '18	Sep '18	Oct '18
	Total	(\$2,165,000.00)	(\$2,341,500.00)						
	Capitalized Expense	\$125,000.00	\$85,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00		
	Air Masks		\$45,000.00	\$25,000.00	\$20,000.00				
	Jet Packs		\$40,000.00				\$20,000.00		
	Consulting	\$490,000.00	\$500,500.00	\$100,000.00	\$90,000.00	\$100,000.00	\$100,000.00		
	Consulting Correction		(\$500.00)						(\$500.00)
	Partner Support		\$500,000.00						
	Eastern EU contractors	\$50,000.00	\$15,000.00						\$16,666.66
	October 2018		\$15,000.00						\$15,000.00
	Hardware	\$820,000.00	\$700,000.00	\$600,000.00	\$20,000.00		\$200,000.00		
	New Wings		\$700,000.00	\$500,000.00	\$50,000.00	\$100,000.00			
	Labor Expense	\$1,500,000.00	\$2,000,000.00						

Famous Frames (true@documentation/innotas)

Planview ID (in early access)



- 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

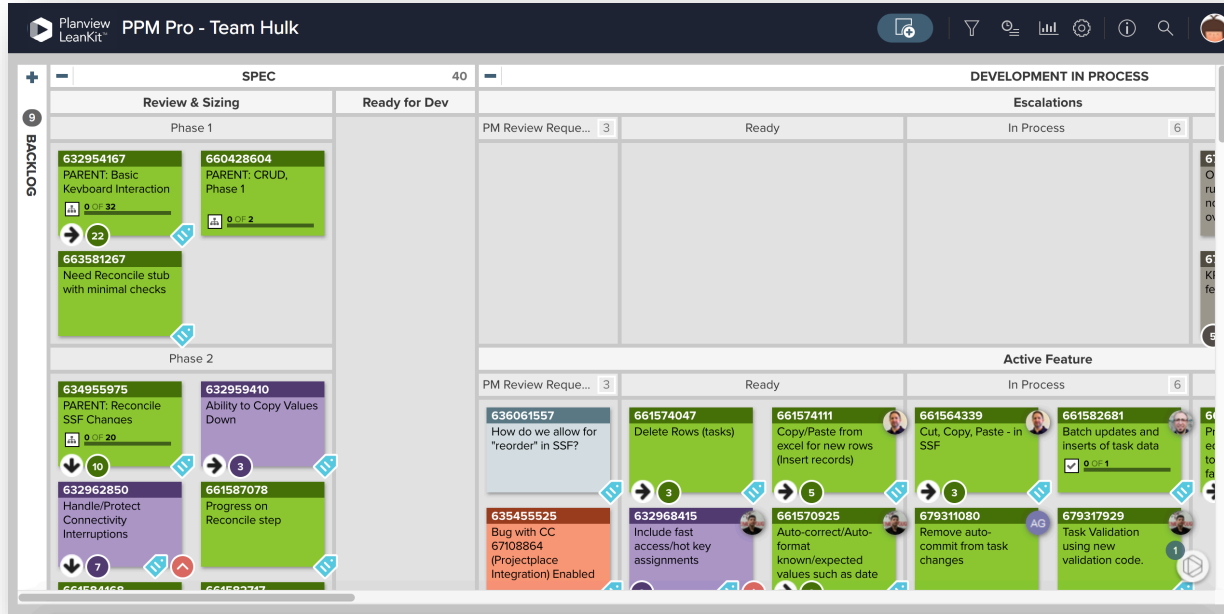
- v1: Time-independent work items, optional:
 - Start date
 - Target date
 - Duration
- v2: Task Backlog

The screenshot displays the Planview PPM Pro interface for a project named 'Hyperspace Bypass'. The interface is divided into two main sections: 'Task Backlog' on the left and 'Tasks' on the right.

Task Backlog: This section contains a table of tasks with columns for 'Est Effort', 'Title', and 'Priority'. A red arrow points to the 'UI Card view' task, which has a low priority. A green arrow points to the 'Print grid' task, which also has a low priority. A tooltip message 'Drag and drop to move task' is visible near the 'Print grid' task.

Tasks: This section displays a detailed view of tasks, including a table with columns for 'Info', 'Duration', 'Est E...', 'Act E...', 'Title', 'Outline', 'Start Date', 'Target Date', 'Complete Date', and 'Category'. The tasks are organized into a hierarchical structure, with 'Initiation' and 'September' being the first two main categories. The 'Initiation' task has a duration of 15 days and a start date of 8/16/2018 9:00 AM. The 'September' task has a duration of 19 days and a start date of 9/3/2018 9:00 AM. The 'October' task has a duration of 25 days and a start date of 10/1/2018 9:00 AM. The 'November' task has a duration of 17 days and a start date of 11/5/2018 9:00 AM. The 'December' task has a duration of 6 days and a start date of 11/2/2018 5:00 PM. The 'Post-Mortem' task has a duration of 6 days and a start date of 11/2/2018 5:00 PM.

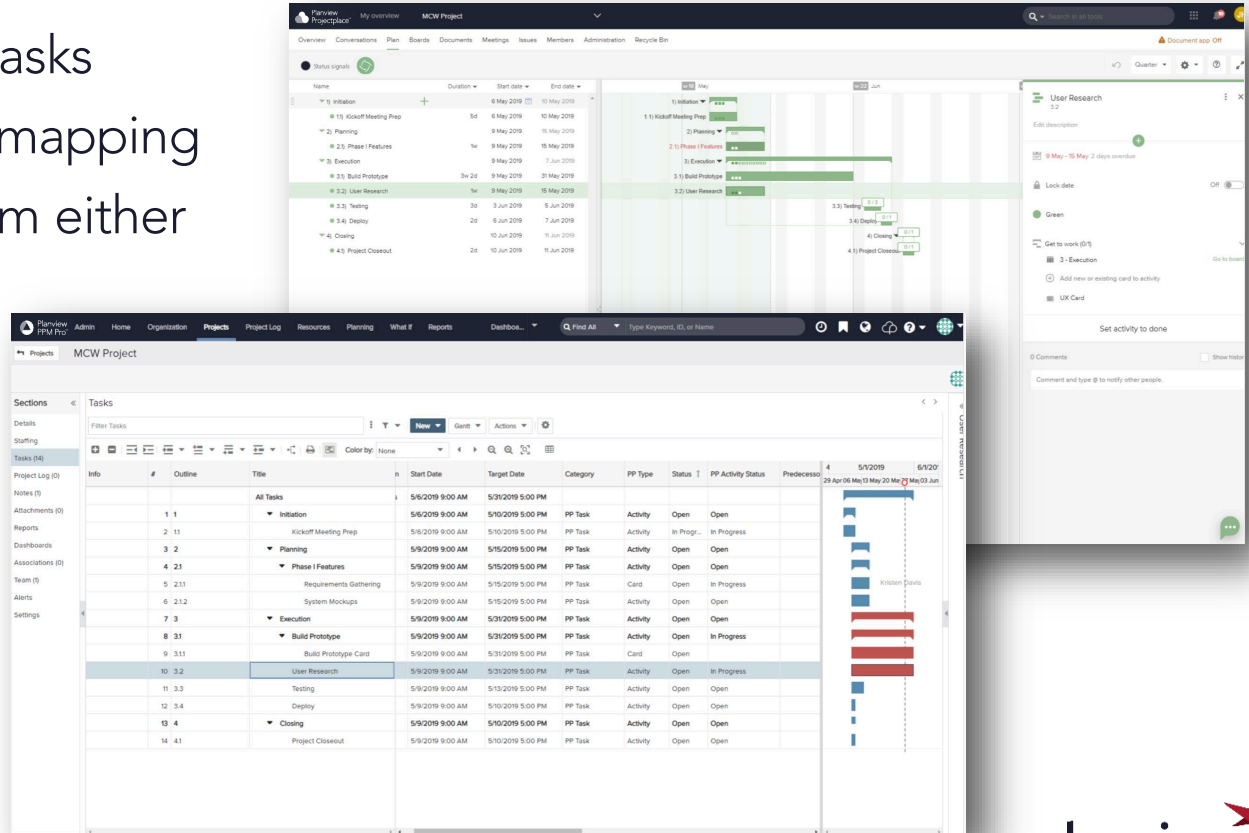
Integrations: LeanKit v2



- 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



Resource SSA (Self-Service Admin)

The screenshot displays the Planview PPM Pro Admin interface. The top navigation bar includes 'Home', 'Resources', 'Project', 'Organization', and 'Admin'. A search bar is present with the text 'Find All' and a placeholder 'Type Keyword, ID, or Name'. The left sidebar shows a tree view of sections: Organization, Permission Profiles, Users, Groups, Setup, Offices/Regions, Calendars, Lookup Lists, Skills, All Entities, People, Available Fields, Categories, Details (highlighted), Additional Details, User Details, Grid Columns, Searchable Fields, Filters, Trend Fields, Scoring, Publishing, Scheduled Jobs, Data Import, and Web Services API. The main content area is titled 'People Details' and shows a 'Category' dropdown set to 'Contractor'. It features three panels: 'Available Fields' with a search bar and a list of fields like 'Active', 'Alternate for Timesheet Approval', 'Billing Rate', etc.; 'Details' with a list of fields like 'First Name', 'Last Name', 'Unit', etc.; and a 'Field: First Name' configuration panel. This panel includes 'Restrictions' (Unrestricted), 'Common Properties' (Method ID: 100442, Title: First Name, Field Origin: Standard, Description: Person's first name, Field Type: String, Details Display Name), and 'Variable Properties' (Required: unchecked, Default Value, Show on New: Yes, Show on Edit: 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

ID	1963916548
Title *	Customer Treats
Description	
Requester *	Entrekin, Caleb
Benefits	
Potential Business Value ↑	
Create Date	

High

Medium

Low

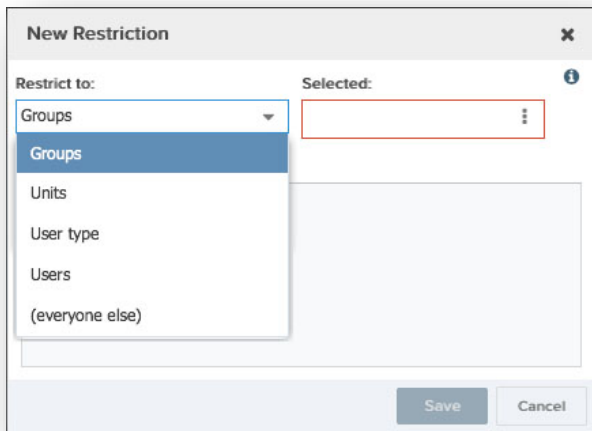
Will bring great things to the company



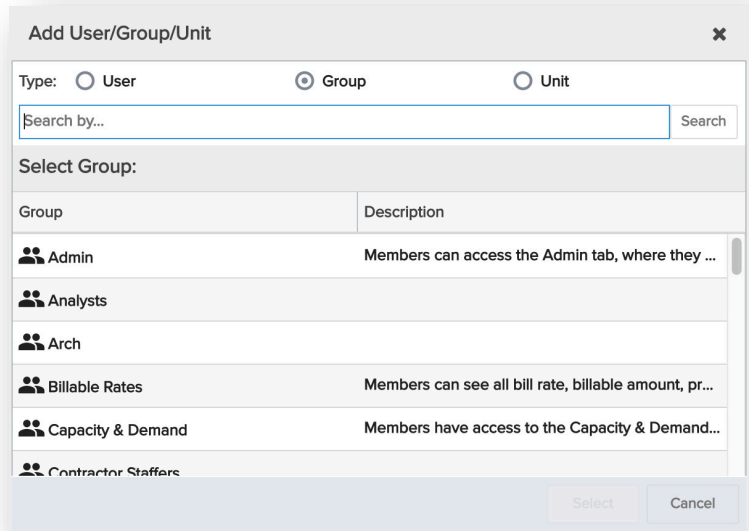
ID	1963916548
Title *	Customer Treats
Description	
Requester *	Entrekin, Caleb
Benefits	
Potential Business Value ↑	High
Business Objective	
Create Date	2/5/2019

User/Group/Unit Field Restrictions







Add Users, Groups, and Units to the “Restrict to” field*



The "New Restriction" dialog box features a "Restrict to:" dropdown menu on the left, which is currently open, showing a list of options: "Groups", "Units", "User type", "Users", and "(everyone else)". The "Groups" option is highlighted. To the right of the dropdown is a "Selected:" field, which is currently empty. At the bottom right of the dialog are "Save" and "Cancel" buttons.



The "Add User/Group/Unit" dialog box has three radio buttons at the top: "User", "Group" (which is selected), and "Unit". Below these is a search bar labeled "Search by..." with a "Search" button. Underneath is a section titled "Select Group:" followed by a table. The table has two columns: "Group" and "Description". It lists several groups with their descriptions. At the bottom right are "Select" and "Cancel" buttons.

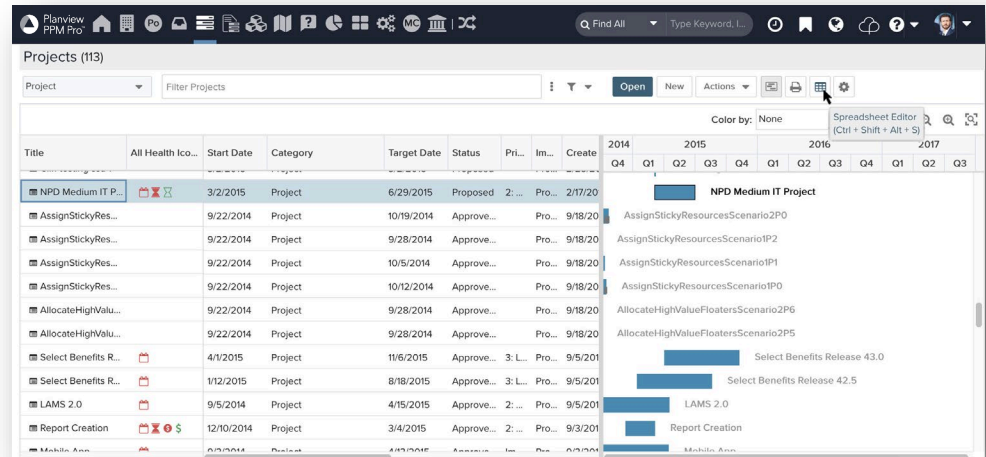
Group	Description
 Admin	Members can access the Admin tab, where they ...
 Analysts	
 Arch	
 Billable Rates	Members can see all bill rate, billable amount, pr...
 Capacity & Demand	Members have access to the Capacity & Demand...
 Contractor Staffers	

*Likely part of Dependent Field Logic

Spreadsheet Editor – SSA Entities

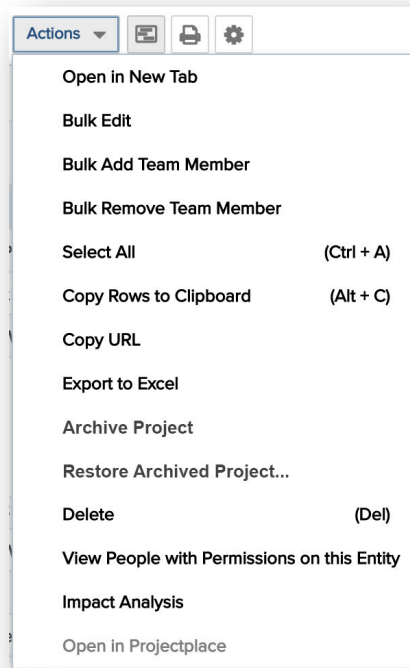
For remaining Self Service Admin entities (Project Logs, Projects, and so on):

- Spreadsheet-style keyboard interaction
- Undo/Redo
- Copy/paste to and from other spreadsheet tools
- Text box editing
- Does not include entity contours



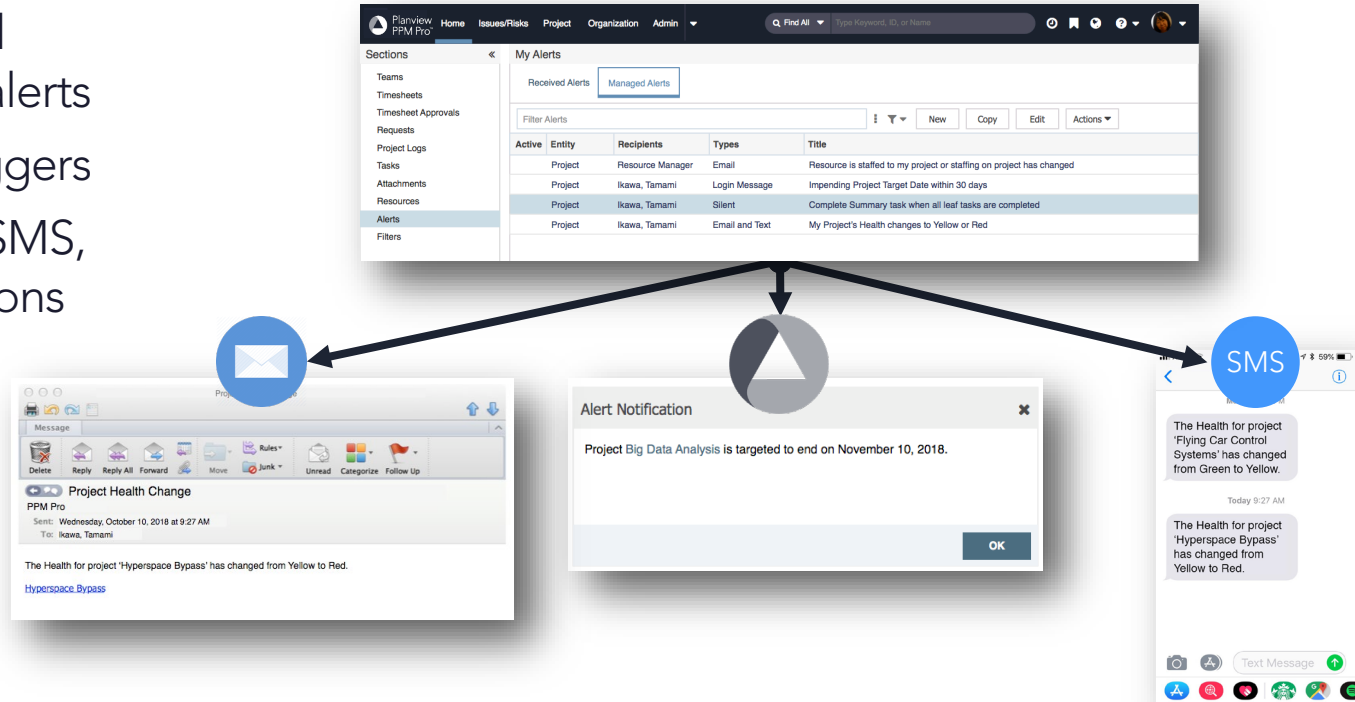
Archiving Projects

- “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



Alerts 2.0

- Easier, centralized management of alerts
- Customizable triggers
- Agnostic: email, SMS, browser notifications
- Advanced logic
- Alert resolution



Customer Driven Product

Customer Inner Circles

User Experience

Reporting + Artifacts

PPM Pro Working Sessions

Customer Roadmap Challenges



Planview
Spigit™

Customer Enhancement Requests

planview™
customer success center

Customer Benefits

Participation in requirements, design, and prioritization

Early view into new functionality

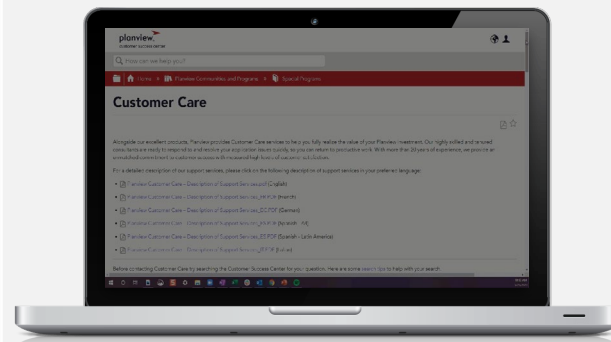
Direct access to other customers and Planview Product Management

Planview Benefits

Voice of the customer

Accurate, real-life use cases

Early feedback and results for high quality product outputs





Q&A



Thank You