



# PPM Pro Customer Webinar: September 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



# 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

# 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

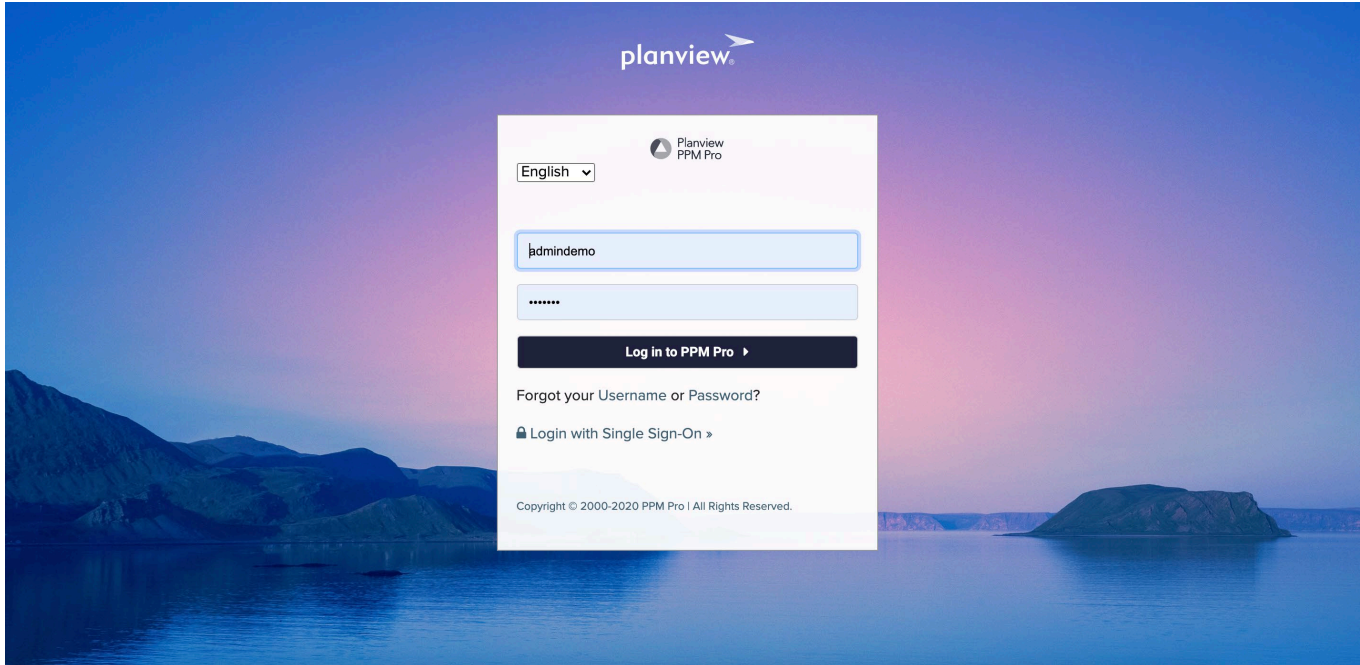
- EV, BAC, PV, AC, CPI, SPI, TCPI, VAC, CV, SV
- EAC, ETC, NPV, ROI
- Simple calculated fields based on other fin sum fields
- Rollups and reporting
- Copy fin sum structure to other projects
- Negative financial entries (feature)
- Baselines management

"Request ID" and "Title" variables for request notifications

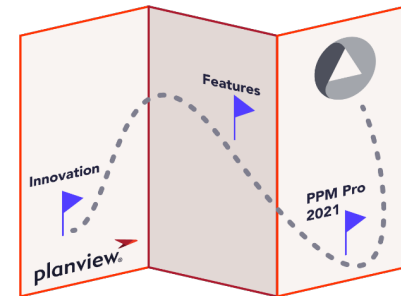
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# Enhancement – New Login Background

New background on PPM Pro Login screen



# PPM Pro 2021 Roadmap Spigit Challenge



- Customers who've registered for a webinar or inner circle will receive email invite
- Seed high-rated features from last Spigit Challenge and a few large customer enhancements
- Challenge timeline
  - Oct 1-7: Ideation
  - Oct 8-14: Rate ideas to identify finalists
  - Oct 15-21: Pairwise comparisons of top 10 rated ideas
- Winners added to Roadmap and announced at November Release webinar

# Cookin' with PPM Pro

- Cookbook for a set of reports and steps to configure them (recipes) within the new reporting beta
- Bake-off! Submit your own recipes to [productmanagement-ppmpro@planview.com](mailto:ppmpro@planview.com) for a chance to win kitchen gadgets, a meal planning subscription, or a donation to a charity of your choice
- To receive a Cookin' with PPM Pro kitchen kit, email [ppmpro@planview.com](mailto:ppmpro@planview.com)



# Upcoming Webinars/Events

- October Release Webinar October 14th
- 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 | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)

**8/26/2020:** Q3 Roadmap | [Q&A Transcript](#) (coming soon!) | [View PDF](#) | [View Presentation](#)

**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