



PPM Pro Customer Webinar: October 2020 Release

Jennifer Rose, PPM Pro Product Manager
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Cetiera Carmona, Customer Marketing Manager (Moderator)
Special Guest Star: Stuart Baker, Solution Architect

Housekeeping Items

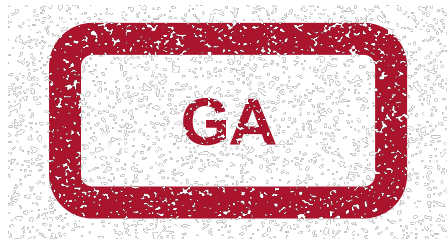
- 30-35 minutes of presentation
- Remainder Q&A
- All lines are on mute
- Enter questions into the Q&A box
 - If you can't see the chat box, click Q&A at the bottom right of the Zoom window
- Webinar is being recorded
- Recording and slides will be shared in post-webinar email, including additional info about the release process



Current Month's Feature Status



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



Reports Revamp – Rolling Beta

Current Beta Functionality

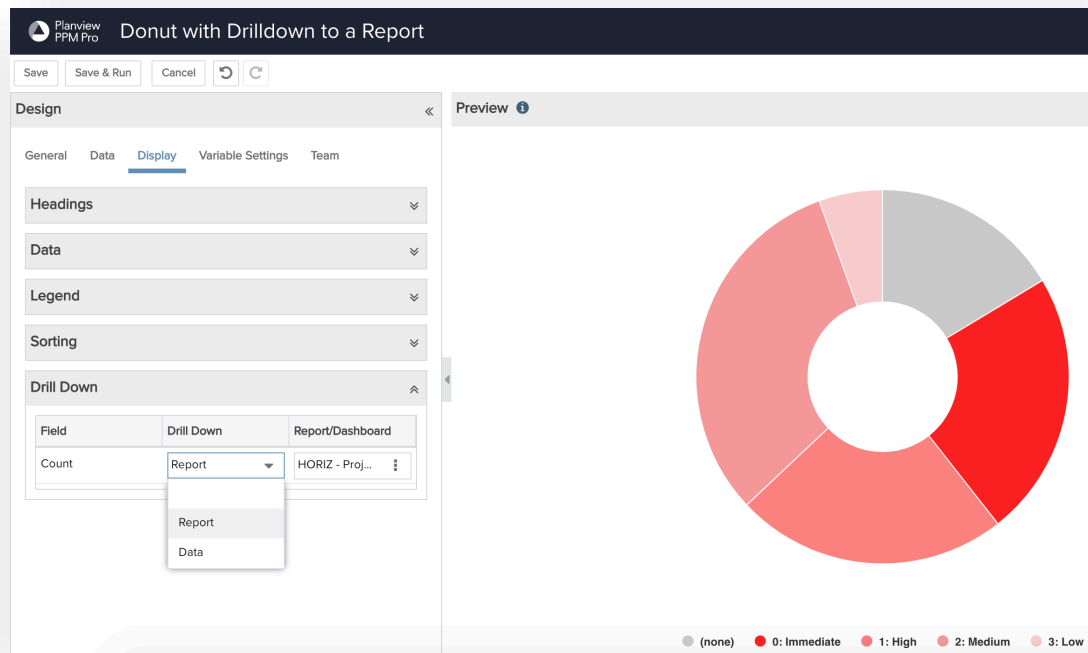
- Usability enhancements
- New Reports grid with Group By
- Basic report topics and types
- New WYSIWYG report designer
- List report options within preview
- Runtime and view filter options
- Ability to set multiple scopes for the report
- Ability to report on indirectly-related data
- Date and number formats
- Hierarchical column sorting
- Gantt report type
- Initial export to PowerPoint
- Stacked area report type
- Reports grid Settings
- Basic time series - date ranges
- Small enhancements such as M and k money display
- All drilldown completed!
- List fields 'Show Field Options'
- Enhanced Grouping and Sorting

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 – Drilldown to Report from Charts

All report types now can drill down to a report



Reports – List Fields ‘Show Field Options’

- More easily update column titles
- View original field labels

The screenshot displays the Planview PPM Pro interface for 'PROJ - Project Details'. The 'Design' tab is active, showing a list of fields under the 'Data' sub-tab. A red arrow points from the 'Show field options' button in the 'List Fields' section to the 'Field Options' dialog box.

Field Options Dialog:

Selected Field	Display Name
Business Sponsor	Business Sponsor
Start Date	Start Date
Target Date	Target Date
Status	Status
Status Comments: Latest	Status Comments
% Complete	% Complete
Total Actual Cost	Total Actual Cost
Department > Title	Department

List Fields (maximum 100 fields):

Field	Value
Status	Red
Status Comments	Green
% Complete	Green
Total Actual Cost	Red
Department	Red

The 'List Fields' section also includes a 'Show field options' button and a 'Move Up' button. The main data table below shows project details for various work items, including 'Work 10003', 'Work 10004', and 'Work 10005'.

Reports – Enhanced Grouping and Sorting

- Group By moved to dropdown option in Sorting
- 5 sort field options

Sorting

☐ Display repeated data

Priority	Field	Direction	Group By
1	Work	Ascend...	Group
2	Task	Ascend...	Group
3	Role	Ascend...	Group
4	Resource	Ascend...	Group and t...
5			

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
- Split Content tab (for ease of use)

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

Dashboards – Split Content Tab




Design








General Content Display Scope Team

Title *

New Dashboard

Description

B **I** **U**   











      

Design

General Content Display Scope Team

Available Reports

Filter Reports (Beta)

Title	Type ↑	Topic	Own
ORG - FE - Portfolio Budget & Co:	Area: Basic	Portfolio	
PROJ - Budget vs Actual Cost	Area: Basic	Work	
ORG - FE - Portfolio Budget & Co:	Area: Stacked	Portfolio	
Total Work Cost - Capex and Ope	Area: Stacked	Portfolio	
New Report	Bubble	Work	
REQ - Drop Down Scoring Quadr	Bubble	Request	
REQ - Intake Idea Quadrant	Bubble	Request	
Total Actual Cost by Type given A	Bubble	Work	
HORIZ - Planned Labor Hours vs	Column: Basic	Work	
PORT - Portfolio Budget Analysis	Column: Basic	Portfolio	

Add →

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
- EV, BAC, PV, AC, CPI, SPI, TCPI, CV, SV

Future Releases

- EAC, ETC, VAC, 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

Financial Summary – “Simple” PMI Metrics

Project standard fields that rely on Financial Summary:

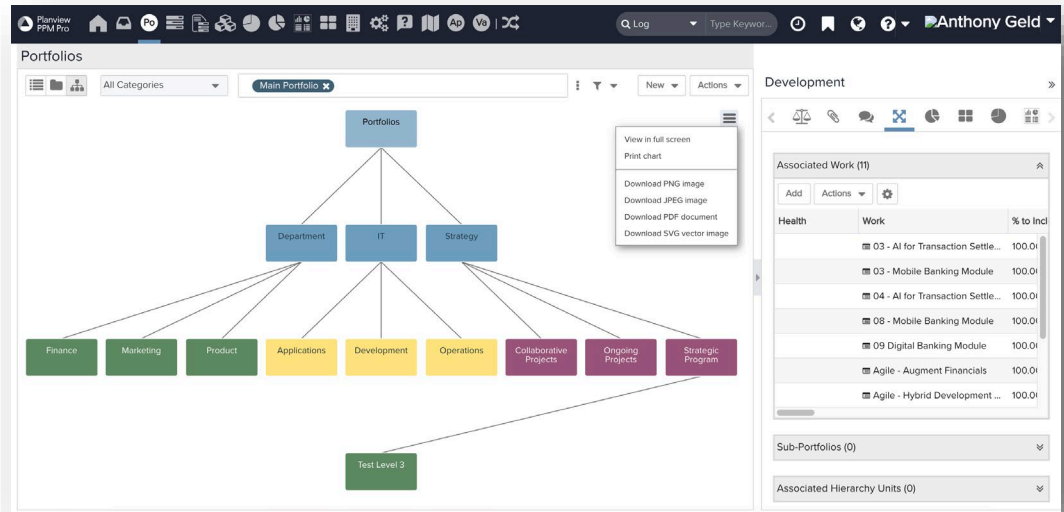
- Budget At Completion (BAC)
- Earned Value (EV)
- Planned Value (PV)
- Actual Cost (AC)
- Cost Performance Index (CPI)
- Schedule Performance Index (SPI)
- To Complete Performance Index (TCPI)
- Cost Variance (CV)
- Schedule Variance (SV)

PMI Metrics	
Budget At Completion	\$70,600.00
Earned Value	\$35,300.00
Planned Value	\$70,600.00
Actual Cost	\$1,270.00
Cost Performance Index	27.80
Schedule Performance Index	0.50
To Complete Performance Index	0.51
Cost Variance	34,030.00
Schedule Variance	(\$35,300.00)

Enhancement – Portfolio Chart View

Replaced Chart View with Highcharts Hierarchy graphic:

- Better handling of special characters
- Easier to read labels
- New menu options
- Future report type!



Enhancement – Sandbox Navigation Bar Color

Easier differentiation between Production and Sandbox

The screenshot shows the Planview PPM Pro interface. The top navigation bar is blue with the Planview PPM Pro logo and various menu items: Home, Issues, Projects, Dashboards, Accounts, Resources, Reports, and Organiza... A search bar is also present. The left sidebar shows a list of sections: Teams, Expenses, Timesheet Approvals (0), Expense Approvals (0), Requests, Issues, Tasks, Attachments (0), Resources (highlighted), Alerts (42), and Filters. The main content area is titled 'My Resources (3)' and shows a table of resources. The table has columns for Photo, Name: Last, First, Primary Role, and months from Oct '20 to Apr '21. The resources listed are 'Squad, A-Team', 'Squad, Hulk', and 'Squad, Storm', all with the role 'Development Squad' and 0% allocation. Below the table, there is a section for 'Allocations: Squad, A-Team' with a table showing no allocations for the selected resources during the displayed time interval. The bottom of the screen displays '*** Sandbox Environment ***'.

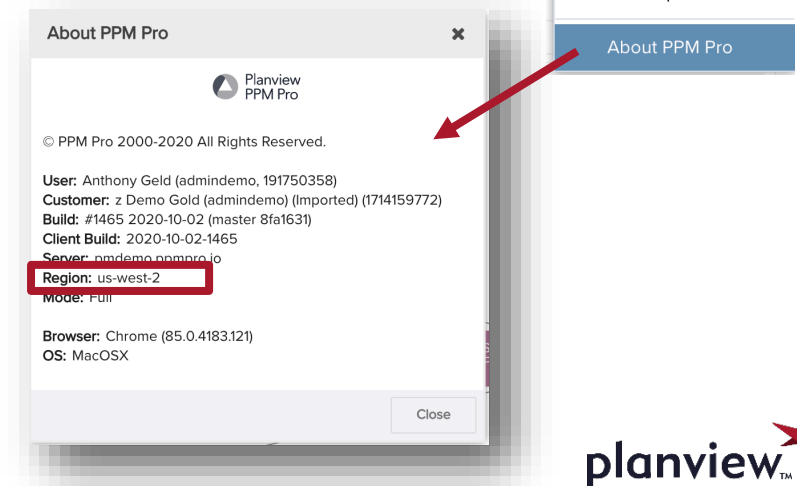
Photo	Name: Last, First	Primary Role ↑	Oct '20	Nov '20	Dec '20	Jan '21	Feb '21	Mar '21	Apr '21
	▲ Squad, A-Team	Development Squad	0%	0%	0%	0%	0%	0%	0%
	▲ Squad, Hulk	Development Squad	0%	0%	0%	0%	0%	0%	0%
	▲ Squad, Storm	Development Squad	0%	0%	0%	0%	0%	0%	0%

Resource	Role	Start Date ↑	End Date	Headcount	Oct '20	Nov '20	Dec '20	Jan '21	Feb '21	Mar '21
The selected resources have no allocations during the displayed time interval.					The selected resources have no allocations during the displayed time interval.					

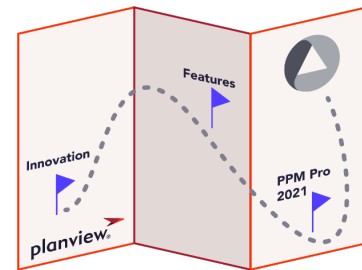
*** Sandbox Environment ***

Other Enhancements

- About PPM Pro Region
- Password 12-character minimum length
 - Passwords must still include at least 1 upper case, 1 number, and 1 symbol
- Does not apply if using SSO



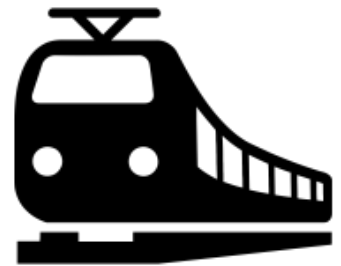
PPM Pro 2021 Roadmap Spigit Challenge



- Customers who've registered for a webinar or inner circle received email invites
- Challenge timeline
 - Oct 1-7: Ideation – done!
 - Oct 8-14: Rate ideas to identify finalists – ends 7 pm Pacific!
 - Oct 15-21: Pairwise comparisons of top 10 rated ideas
- Winners added to Roadmap and announced at November Release webinar

Coming (or Going) Soon!

- IE11 support deprecation March 31, 2021
- Community Discussions deprecation after October release
- Iterative Work Management phase 1
 - Task Start Date and Target Date fields optional
 - Task Duration field optional



Upcoming Webinars/Events/Features

- November Release Webinar November 18th (last one for 2020!)
- 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 | [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](#) | [View PDF](#) | [View Presentation](#)
9/17/2020: September Release | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)
10/14/2020: October Release | [Register](#)
11/18/2020: November Release | [Register](#)

Q&A

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Thank You