

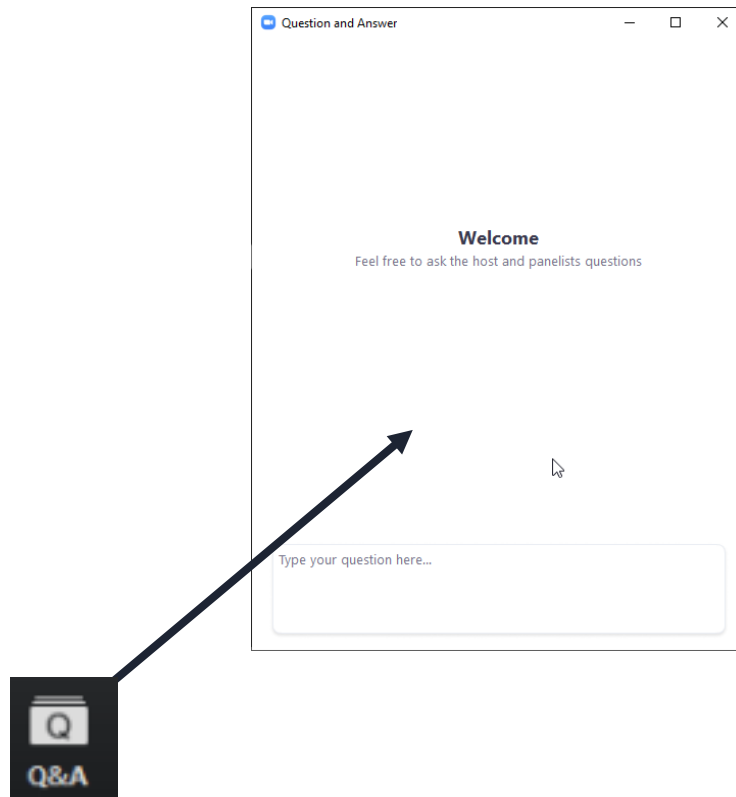


PPM Pro Customer Webinar: November 2020 Release

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



Next Chapter of Planview

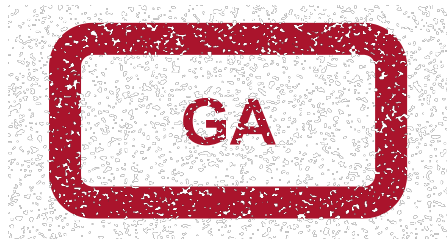
- Planview Acquired By TPG and TA for \$1.6B
- Strong affirmation of our vision and strategy for today's market in transformation
- Accelerate vision, roadmap, and market presence
- Operationally, there will be no changes
- Transaction expected to close in Q4



Current Month's Feature Status



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



Reports Revamp – Rolling Beta

Current Beta Functionality

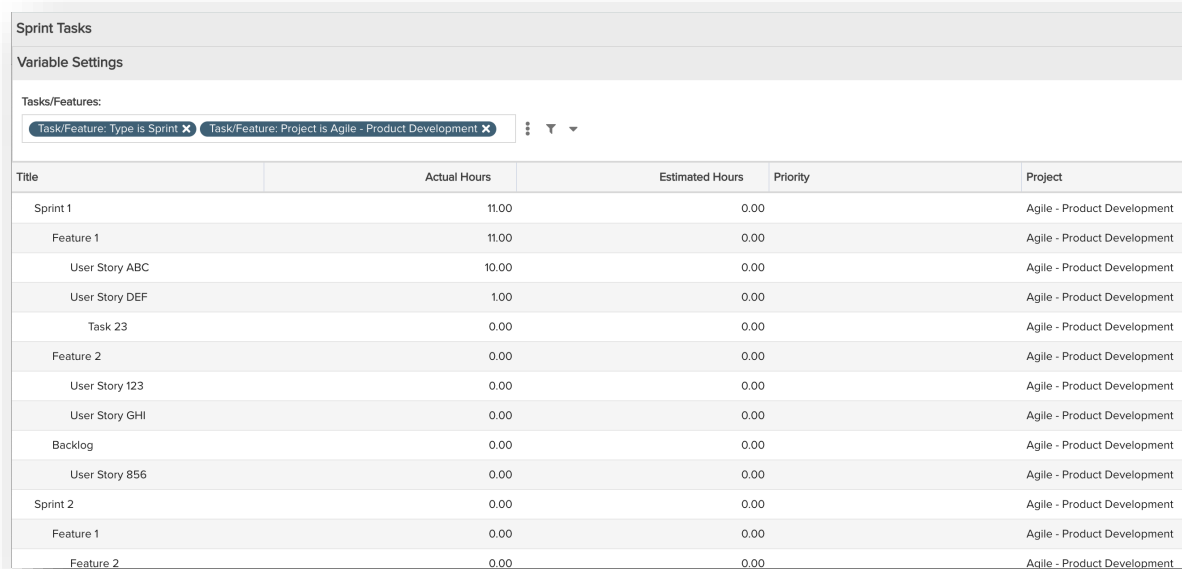
- New Reports grid with Group By
- Basic report topics and types
- New WYSIWYG report designer
- List report options within preview
- Runtime and view filter options
- Ability to set multiple scopes for the report
- Ability to report on indirectly-related data
- Date and number formats
- Grouping and sorting
- Gantt report type
- Initial export to PowerPoint
- Stacked area report type
- Basic time series - date ranges
- Drilldowns
- List fields 'Show Field Options'
- Hierarchy in List type reports (portfolios, sub-portfolios, tasks)
- Specialty reports: Scoring and Permissions
- Combination type: Area + Column + Line
- Gantt, Bubble, Pie/Donut, and general enhancements
- Organization color lookup list configuration

Future Releases

- 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 – Hierarchy List Reports

- Entities with a hierarchy, such as portfolios and tasks
- Filter to a specific level (with great power...)



Sprint Tasks

Variable Settings

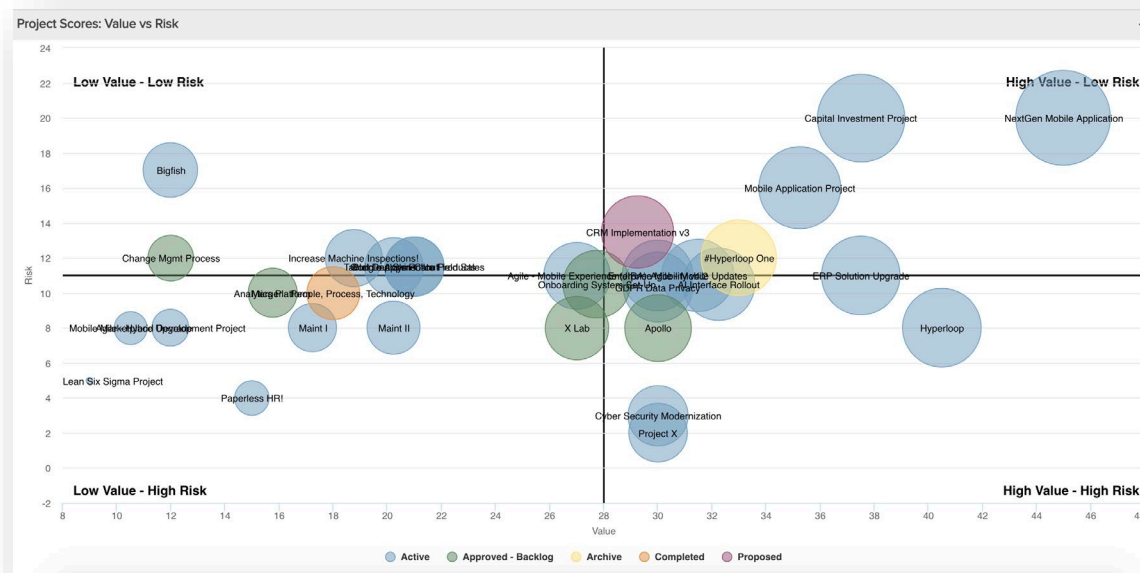
Tasks/Features:

Task/Feature: Type is Sprint ✕ Task/Feature: Project is Agile - Product Development ✕

Title	Actual Hours	Estimated Hours	Priority	Project
Sprint 1	11.00	0.00		Agile - Product Development
Feature 1	11.00	0.00		Agile - Product Development
User Story ABC	10.00	0.00		Agile - Product Development
User Story DEF	1.00	0.00		Agile - Product Development
Task 23	0.00	0.00		Agile - Product Development
Feature 2	0.00	0.00		Agile - Product Development
User Story 123	0.00	0.00		Agile - Product Development
User Story GHI	0.00	0.00		Agile - Product Development
Backlog	0.00	0.00		Agile - Product Development
User Story 856	0.00	0.00		Agile - Product Development
Sprint 2	0.00	0.00		Agile - Product Development
Feature 1	0.00	0.00		Agile - Product Development
Feature 2	0.00	0.00		Agile - Product Development

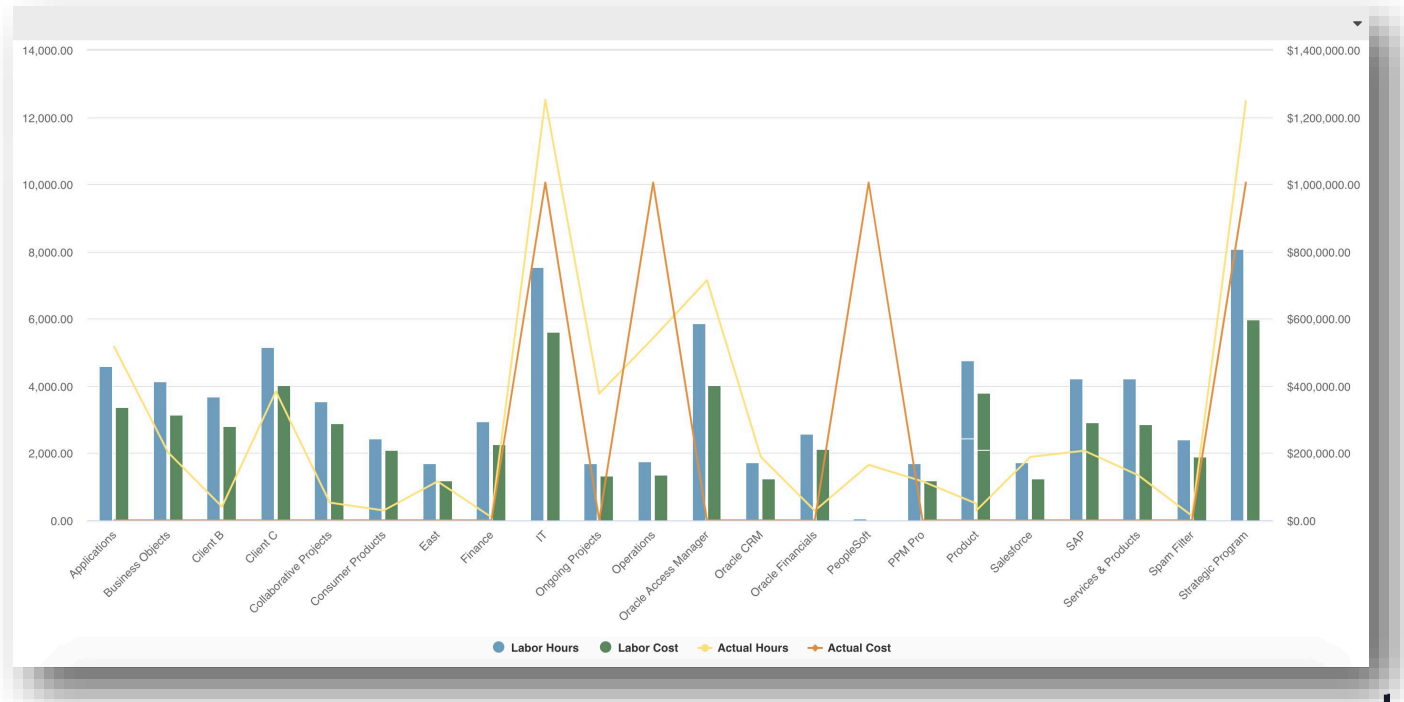
Reports – Specialty and/or Topic Reports

- Scoring specialty- categories AND criteria!
- Permissions topic & specialty – profiles AND profile contents!



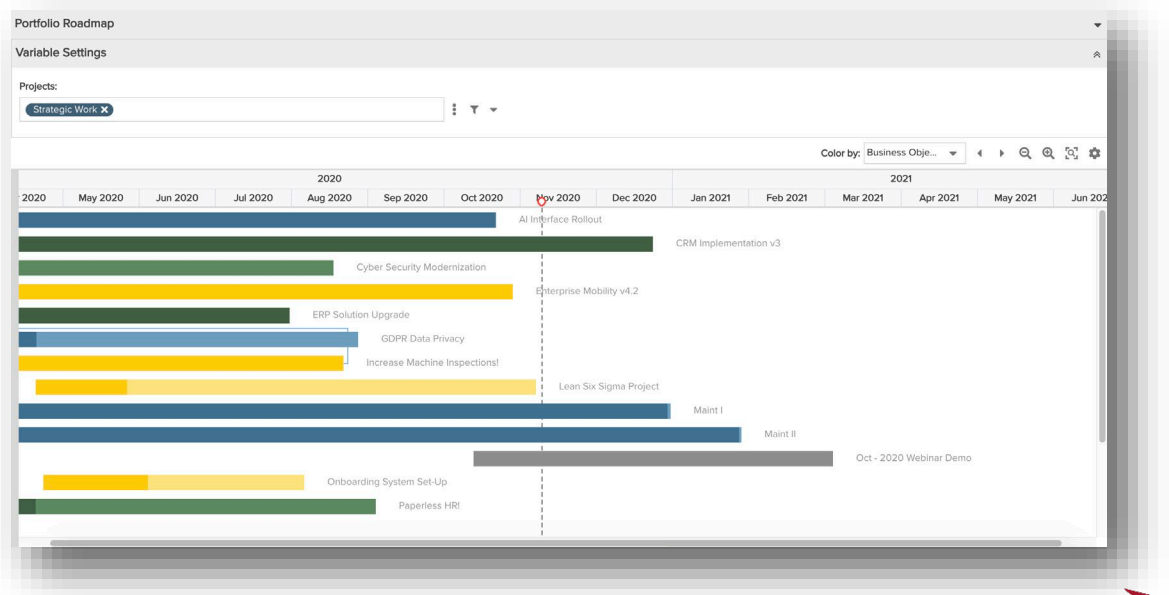
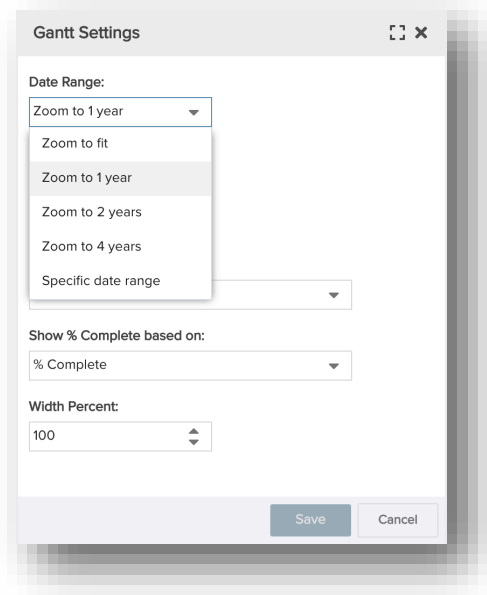
Reports – Combination Report Type

Area and/or Column and/or Line



Reports – Gantt Enhancements

- Date Range
- Width Percent



Reports – Bubble Enhancements

- More legible labels, inside or leader lines
- Minimum and maximum axes values
- Quadrant lines and labels

Data

Data values:

Show inside bubble

Do not show

Show inside bubble

Show with leader line

Min value:

Max value:

Quadrant

Show Quadrant:

Show

Quadrant Font:

Helvetica

Style:

Bold

Size:

16

Bottom Left Label:

Low Value - Low Risk

Bottom Right Label:

High Value - Low Risk

Top Left Label:

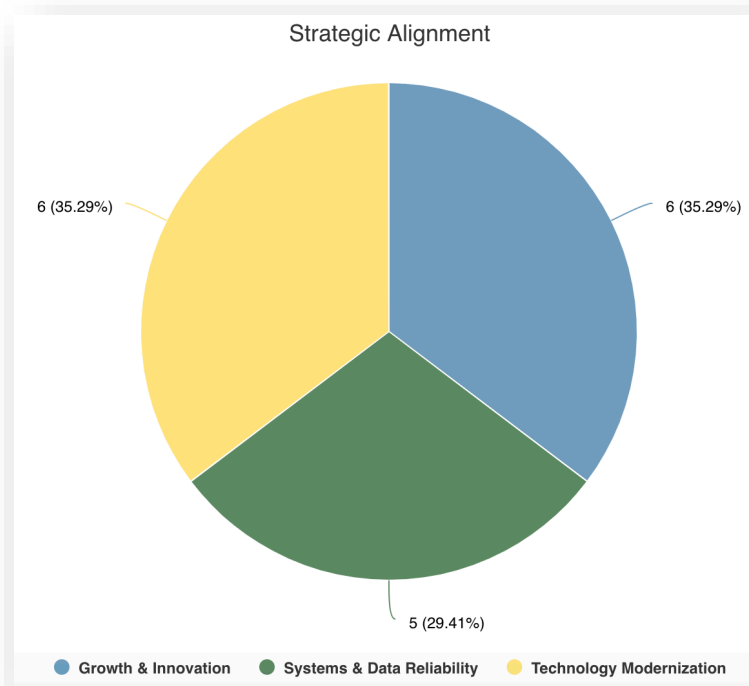
Low Value - High Risk

Top Right Label:

High Value - High Risk

Reports – Pie and Donut Enhancements

Display actual values and/or percent



Data

Data values:

Show percentage and value

Do not show

Show value

Show percentage

Show percentage and value

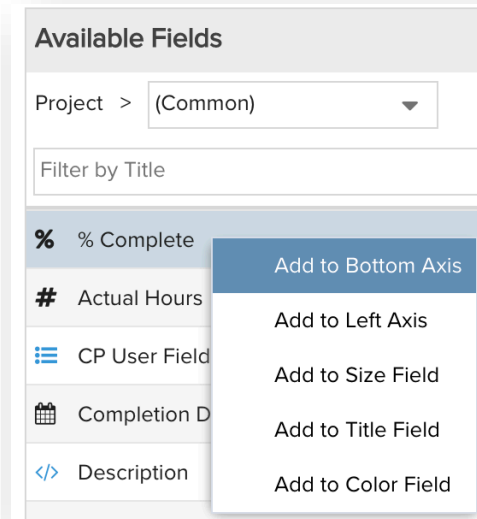
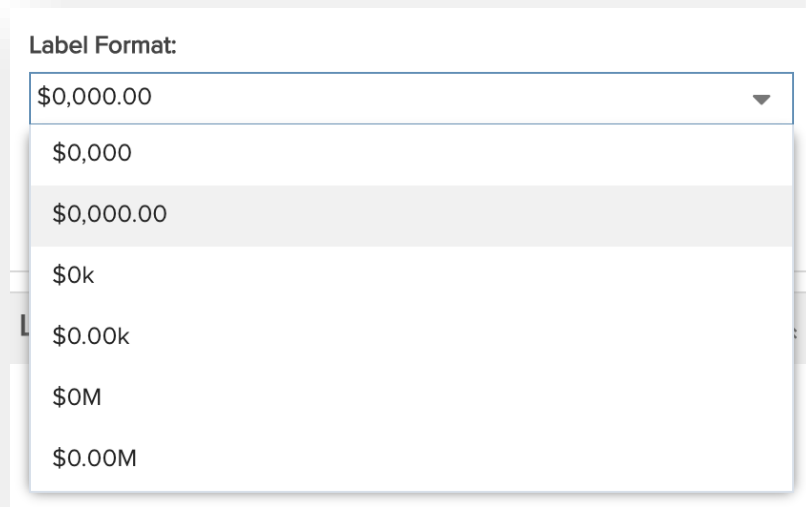
Reports – Organization Color Lookup List Config

Adjust colors and sequence used in new reports *and* within the user interface request cards, portfolio chart view, Gantts

All Lookup Lists (124)			List Values: Organization Color Palette						
Filter by Title			Show Active Values Only						
ID	Title ↑	Type	Default	ID	Active	Title	Description	Color	Icon
2482179682	OKR Type	User Defined	✓	2496982466	✓	other-gray-light	This default list it...	#CCCCCC	
589231830	Operating System	User Defined		2496982467	✓	blue-regular		#6F9EBF	
24969824...	Organization Color Palette	Standard		2496982468	✓	green-darker		#5E8962	
467589908	Payback Period	User Defined		2496982469	✓	yellow-regular		#FFE47D	
18573767	Portfolio Status	Status		2496982472	✓	orange-darker		#E19240	
1581707829	Priority List	User Defined		2496982470	✓	lilac-darker		#9A547A	
24090899...	Product Options	User Defined		2496982471	✓	teal-regular		#7ABCBD	
1715698370	Product Type (NPD)	User Defined		2496982473	✓	red-lighter		#F1C7C5	
18424380	Project Business Objective	Standard		2496982474	✓	blue-darker		#437395	
18424379	Project Investment Type	Standard		2496982475	✓	green-lighter		#BFD9C2	
8827016	Project Phase	Standard		2496982476	✓	yellow-darker		#EBCA46	
8827171	Project Priority	Standard		2496982477	✓	lilac-lighter		#D9BECB	
18424381	Project Risk	Standard		2496982478	✓	teal-darker		#528E8F	
8827181	Project Status	Status		2496982479	✓	orange-lighter		#FEE0C1	
8827103	Project Type	Standard		2496982480	✓	red-regular		#E58D8A	

Reports – Other General Enhancements

- Additional axes label options: no decimal, k and M (if money)
- Context/right mouse click Available Fields menu options



Dashboards Revamp – Rolling Beta

Current Beta Functionality

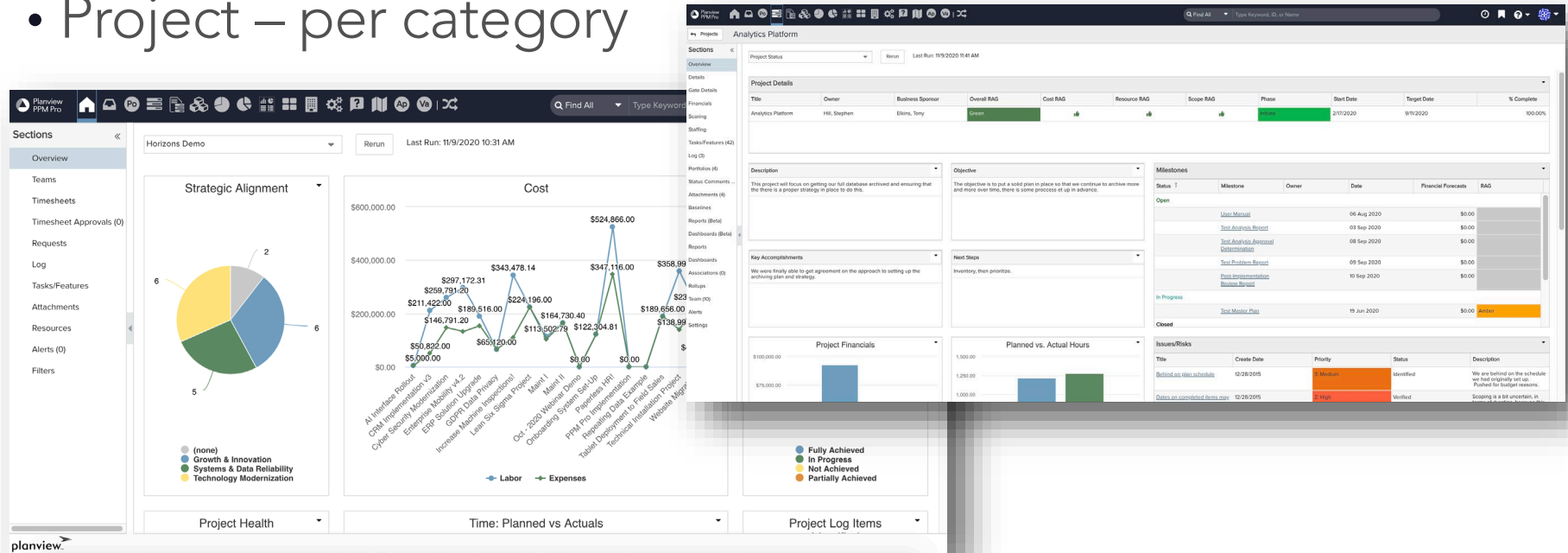
- New Dashboards grid with Group By
- WYSIWYG dashboard designer, with ability to drag and drop or click “Add” button to add a report to the dashboard
- Scope tab with ability to specify what entity dashboard grids the dashboard shows up on
- Preview - able to move reports around, resize, and remove
- 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)
- Home and project Overview section dashboards

Future Releases

- 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 – Home and Project Overview Sections

- Home – per user, works with Bulk Edit
- Project – per category



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

- Rollups and reporting
- EAC, ETC, VAC, NPV, ROI
- Simple calculated fields based on other fin sum fields
- Copy fin sum structure to other projects
- Negative financial entries (feature)
- Baselines management



Enhancement – Portfolios from Templates

Copy template project's portfolios when creating projects, using % to include:

- specified % (defaults to 100%)
- same as template project

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

Schedule from: *
11/9/2020

Use a Project template to supply default values for the new Project:

#PM Methodology

Project Category: *
Standard Project

☐ Copy all template elements, or select individual elements below

- ☐ Dashboard Links
- ☐ Financial Entries - Forecasts
- ☒ Portfolios
- ☐ Project calendar
- ☐ Alert Routes

Assign % to include for all portfolios:

☒ 100 %

☐ The same as template project

Enhancement – Request Action Notes → Activity Log

Only explicitly entered notes will appear in Notes, all other action-based notes & notifications will be solely in Activity Log

The screenshot shows the 'Holiday Promos' record with the 'Notes' tab selected. The 'Add Note' button is visible, and the 'Actions' dropdown is open. A single note is displayed:

By	Note	On
Jobanputra, Leena	This would help alot Please do consider this one, everyone could use a lift this year!	11/9/2020 10:04 AM

The 'Message' pane on the right shows the content of the selected note: "Please do consider this one, everyone could use a lift this year!". At the bottom, there are buttons for 'Save', 'Save & Approve', 'Other Actions', and 'Close'.

The screenshot shows the 'Holiday Promos' record with the 'Activity Log' tab selected. A search bar is at the top, and a table of activities is displayed below.

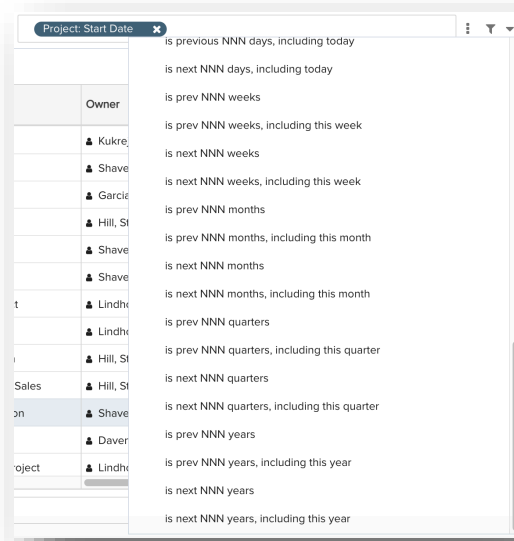
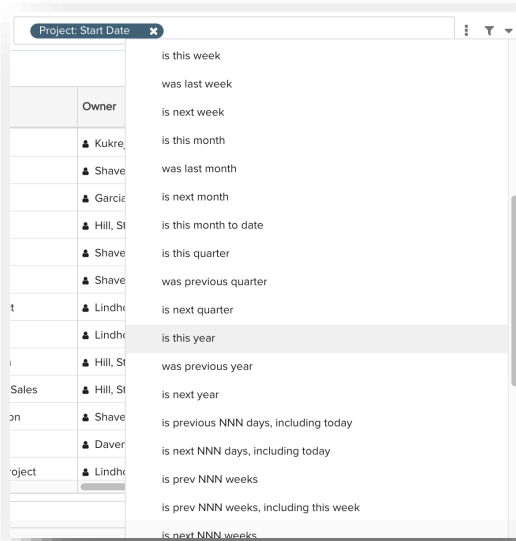
Date	Gate	Activity	Performed By
11/9/2020 10:09 AM	Steering Committee Review	Entering gate Steering Committee Review	
11/9/2020 10:09 AM		"Requester notification sent" Note added To: Jackie Thomas Subject: Request received an approval at Initial Review gate Message: The request below has received an approval at ... "Approving to next gate, we'll see if we can expedite" Holiday Promos	Geld, Anthony
11/9/2020 10:09 AM		"Initial Review: Approve" Note added Approving to next gate, we'll see if we can expedite	Geld, Anthony
11/9/2020 10:09 AM		Request received an approval at Initial Review gate	Geld, Anthony
11/9/2020 10:04 AM		"This would help alot" Note added	Jobanputra, Leena
11/9/2020 9:56 AM	Initial Review	Entering gate Initial Review	
11/9/2020 9:56 AM		Reuquest submitted	Geld, Anthony

At the bottom, there are buttons for 'Save', 'Save & Approve', 'Other Actions', and 'Close'.

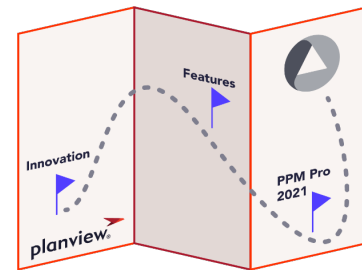


Other Enhancements

- Portuguese language support
- “is this year” in November release, more comprehensive relative date filter options in December release



PPM Pro 2021 Roadmap Spigit Challenge

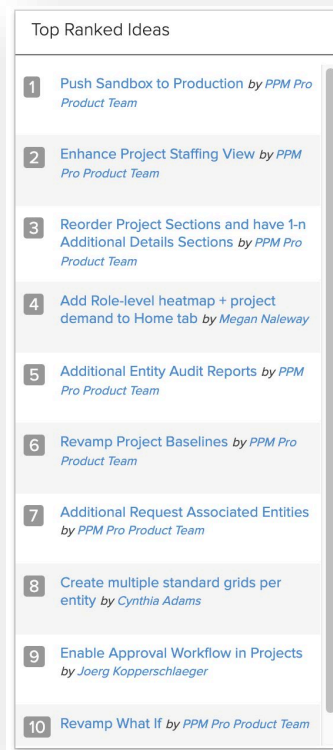


- Customers who'd registered for a webinar or inner circle received email invites
- Challenge timeline
 - Oct 1-7: Ideation
 - Oct 8-14: Rated ideas to identify finalists
 - Oct 15-21: Pairwise comparisons of top 10 rated ideas

194 Visitors	112 Ideas	102 Comments	1917 Pairwise Votes
118 Active Users	38 Number of Ideators	22 Number of Commenters	74 # Pairwise Voters
2890 Number of Votes	32% Ideation %	19% Commenter %	63% Pairwise Participation %

PPM Pro 2021 Roadmap Feature *Tentative* Additions

- Top 3 Customer Spigit challenge winners:
 - Sandbox to Production
 - Enhance Project Staffing View
 - Reorder Project Sections, 1-n Additional Sections
- Internal Spigit Challenge winner + Product:
 - Card Views for other SSA Entities
 - OData revamp
- UX inner circle review, Roadmap webinar



Coming (or Going) Soon!

- IE11 support deprecation March 31, 2021
- Iterative Work Management phase 1
 - Task Start Date and Target Date fields optional
 - Task Duration field optional
 - December Target



Upcoming Webinars/Events/Features



- December Release
 - Dates moved up by 1 week
 - No Webinar - Happy holidays!
- Register for all webinars in advance (within a few weeks)
- <https://success.planview.com/Planview PPM Pro/Release Information/Customer Webinars>

Q&A

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Jennifer jrose@planview.com



Thank You