



PPM Pro Customer Webinar: January 2021 Release

Thanks for joining! We'll start 1 minute after the bottom of the hour.



PPM Pro Customer Webinar: January 2021 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



Current Month's Feature Status



Beta

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



GA

Iterative Work Management (December 2020)
Negative Financial Entries

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
- Hierarchy in List type reports (portfolios, sub-portfolios, tasks)
- Specialty reports: Scoring and Permissions
- Combination type: Area + Column + Line
- Organization color lookup list configuration
- Field Options 'Display Data As'
- Stacked list report type (fka Multi-Column Format)

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 – Field Options ‘Display Data As’

Data tab's Field Options modal includes 'Display Data As', except where axes 'Label Format' is available in Display tab

Field Options

Previous

Left Axis - Column (maximum 10 fields)

Next

Move Up

Move Down

Remove

Selected Field	Display Name	Display Data As
Labor Hours	Labor Hours	<div>0</div> <div>0,000.00</div>

Field Options

Move Up

Move Down

Remove

Selected Field	Display Name	Display Data As
Title	Title	
Owner	Owner	
Business Sponsor	Business Sponsor	
Overall RAG	Overall RAG	Value on top of Color
Cost RAG	Cost RAG	Colored Icon
Resource RAG	Resource RAG	Colored Icon
Scope RAG	Scope RAG	Colored Icon
Phase	Phase	Value on top of Color
Start Date	Start Date	Locale-based Short Date
Target Date	Target Date	Locale-based Short Date
% Complete	% Complete	0.00

Reports – Stacked List Report Type

Report option formerly known as Multi-Column Format now an improved first-class report Type

Design

General Data Display Variable Settings Team

Topic *

Project

Specialty

None

Type *

List: Stacked

Combination: Area, Column, Line

Crosstab

Donut

Gantt

Heatmap

Line

List: Basic

List: Stacked

Pie: Basic

Project Details

Title #Hyperloop One

Description Hyperloop is a new mode of transportation that moves freight and people quickly, safely, on-demand and direct from origin to destination. Passengers or cargo are loaded into the Hyperloop vehicle and accelerate gradually via electric propulsion through a low-pressure tube. The vehicle quickly lifts above the track using magnetic levitation and glides at airline speeds for long distances due to ultra-low aerodynamic drag. Hyperloop systems will be built on columns or tunneled below ground to avoid dangerous grade crossings and wildlife. It's fully autonomous and enclosed, eliminating pilot error and weather hazards. It's safe and clean, with no direct carbon emissions.

Business Objective Technology Modernization

Strategic Objective Reduce enviro footprint by 50% in 2020

Project Dates

Start Date 5/1/2020

Target Date 3/1/2021

Latest Status Comment Date

Completion Date

Project Health

Overall Health Green

Scope RAG Green

Resource RAG Green

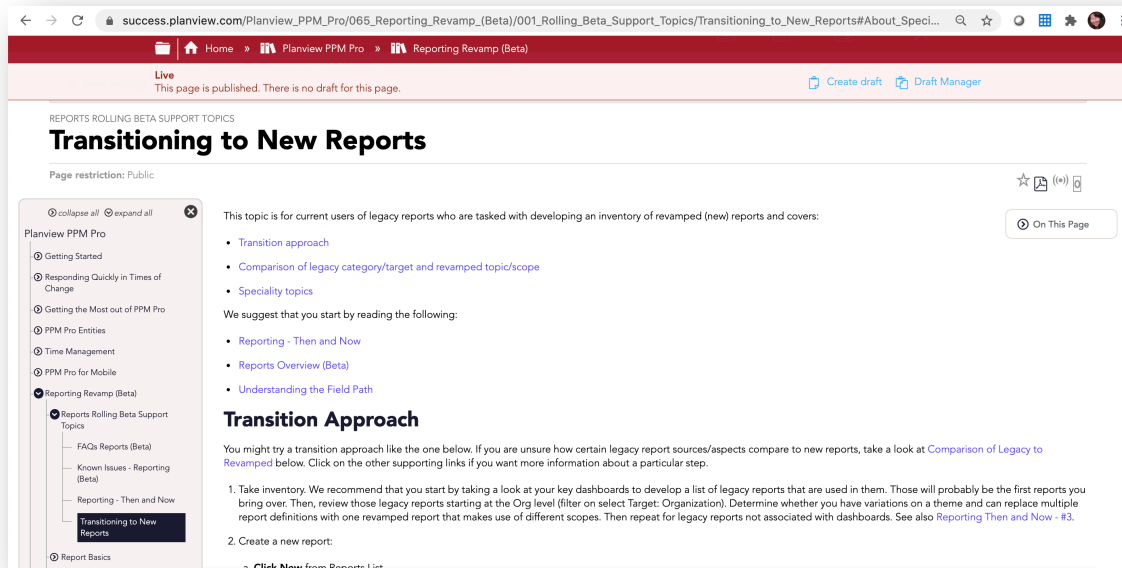
Cost RAG Green

Current Project Status

Owner	Kukreja, Samir	Priority	1: High	Status	Archive
Type	Strategic	% Complete	0.00%	Total Budget	\$150,000.00
Total Forecast	\$0.00	Total Actuals	\$200.00	Total Cost	\$230,061.44
Total Projected Benefits	\$0.00	ROI	246.91%	NPV	\$0.00

Reports – New Report Transition Topic on CSC

[https://success.planview.com/Planview_PPM_Pro/065_Reporting_Revamp_\(Beta\)/001_Rolling_Beta_Support_Topics/Transitioning_to_New_Reports#About_Specialty_Reports](https://success.planview.com/Planview_PPM_Pro/065_Reporting_Revamp_(Beta)/001_Rolling_Beta_Support_Topics/Transitioning_to_New_Reports#About_Specialty_Reports) (shout out to Logan!)



Dashboards Revamp – Rolling Beta

Current Beta Functionality

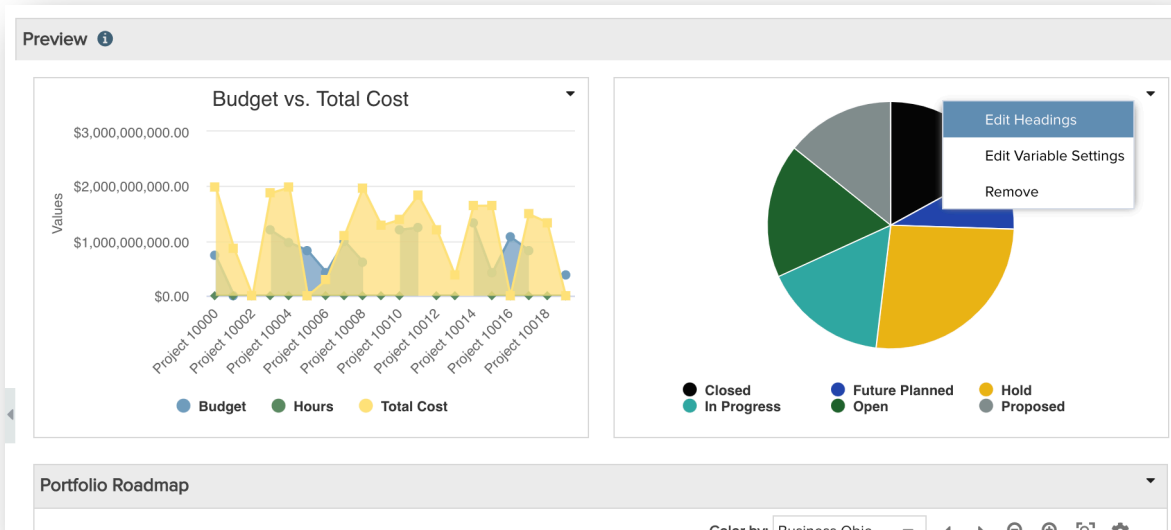
- New Dashboards grid with Group By
- WYSIWYG dashboard designer, with ability to drag and drop or click “Add” button to add a report to the dashboard
- Scope tab with ability to specify what entity dashboard grids the dashboard shows up on
- Preview - able to move reports around, resize, and remove
- 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
- Change report component headings (December 2020)

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 – Report Headings (December 2020)

Edit dashboard report's container title and headings



Edit Headings: PROJ - Task by Status ✕

Container Title:

Heading:

Heading position:

Center Align

Heading font: Style: Size:

Helvetica Normal 18

Subheading:

Subheading position:

Center Align

Subheading font: Style: Size:

Helvetica Normal 12

Save Cancel

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
- Field References
- Variance columns (total and time series)

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

Financial Summary – Field References

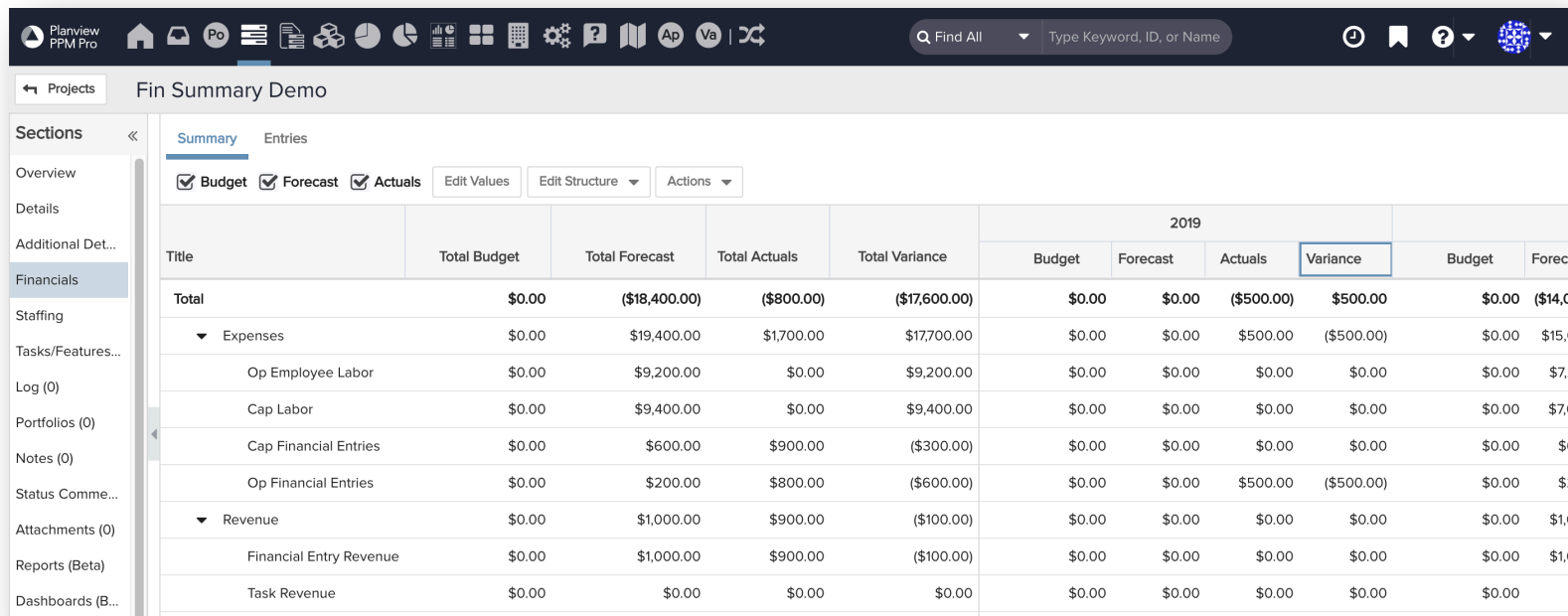
See which project Financial Summary structures use a Financial Summary field

The screenshot displays the Planview PPM Pro interface. On the left, a sidebar shows 'Sections' with 'Financial Summary Components' selected. The main area is titled 'Financial Summary Components' and has tabs for 'General' and 'Fields'. The 'Fields' tab is active, showing a table with columns: Title, Description, Cash, Capitalized, Labor, and References. The table lists three items: 'Cap Financial Entries', 'Cap Labor', and 'Expenses'. The 'References' column for 'Cap Financial Entries' is highlighted, showing a cross icon. A 'References' dialog box is open, displaying a table with columns 'Title' and 'Owner'. The dialog shows four entries, all owned by 'Geld, Anthony'. The dialog also includes a 'Close' button and a 'Showing 4 of 4' indicator.

Title	Owner
Fin Summary Demo	Geld, Anthony
Fin Sum Demo 7-9-20	Geld, Anthony
Fin Sum Demo Release Webinar	Geld, Anthony
Aug Webinar demo	Geld, Anthony

Financial Summary – Variance Columns

Total and time series Variance → (Forecast - Actuals)



2019										
Title	Total Budget	Total Forecast	Total Actuals	Total Variance	Budget	Forecast	Actuals	Variance	Budget	Forecast
Total	\$0.00	(\$18,400.00)	(\$800.00)	(\$17,600.00)	\$0.00	\$0.00	(\$500.00)	\$500.00	\$0.00	(\$14,000.00)
Expenses	\$0.00	\$19,400.00	\$1,700.00	\$17,700.00	\$0.00	\$0.00	\$500.00	(\$500.00)	\$0.00	\$15,000.00
Op Employee Labor	\$0.00	\$9,200.00	\$0.00	\$9,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,000.00
Cap Labor	\$0.00	\$9,400.00	\$0.00	\$9,400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,000.00
Cap Financial Entries	\$0.00	\$600.00	\$900.00	(\$300.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$600.00
Op Financial Entries	\$0.00	\$200.00	\$800.00	(\$600.00)	\$0.00	\$0.00	\$500.00	(\$500.00)	\$0.00	\$200.00
Revenue	\$0.00	\$1,000.00	\$900.00	(\$100.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00
Financial Entry Revenue	\$0.00	\$1,000.00	\$900.00	(\$100.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00
Task Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Negative Financial Entries (GA)

Negative forecasts and actuals in UI, data import, and API

The screenshot displays the 'Fin Summary Demo' interface in Planview PPM Pro. The left sidebar shows a 'Sections' menu with 'Financials' selected. The main area is titled 'Fin Summary Demo' and has tabs for 'Summary' and 'Entries'. Below the tabs is a 'Filter Financial Entries' search bar and a toolbar with buttons for '+', '-', 'New Actuals', 'New Forecast', 'Actions', and icons for print, grid, and settings. A table of financial entries is shown with columns for Info, Title, Forecast, Actuals, Cash, Capitalized, Labor, Variance, and months from Aug '19 to Dec '19. The table includes rows for Total, Expense 1 - Op, Actual Exp 1 - Op, Expense 2 - Cap, Actuals Exp 2 - Cap, Forecast Revenue, and Actuals Revenue. The 'Actual Exp 1 - Op' row shows a negative value of (\$500.00) in the Sep '19 column, which is highlighted with a blue box.

Info	Title	Forecast	Actuals	Cash	Capitalized	Labor	Variance	Aug '19	Sep '19	Oct '19	Nov '19	Dec '19
	Total	\$200.00	\$0.00				(\$200.00)					
	▼ Expense 1 - Op	\$200.00	\$0.00	Outflow		✓	\$200.00					
	Actual Exp 1 - Op		\$0.00	Outflow		✓		\$500.00	(\$500.00)			
	▼ Expense 2 - Cap	\$600.00	\$900.00	Outflow	✓	✓	(\$300.00)					
	Actuals Exp 2 - Cap		\$900.00	Outflow	✓	✓						
	▼ Forecast Revenue	\$1,000.00	\$900.00	Inflow			(\$100.00)					
	Actuals Revenue		\$900.00	Inflow								

Iterative Work Management (GA December 2020)

- Task Start Date, Target Date, and Duration now optional
- Multiple task owners

The screenshot displays the Planview Iterative Work Management interface. On the left, a table titled 'Tasks/Features' lists various tasks and sprints. The table has columns for Info, #, Outline, Title, Categ..., Start Date, Target Date, Duration, Pre..., and Priority. The task 'User Story J' (row 28) is highlighted. On the right, a detailed view for 'User Story J' is shown, including fields for JIRA Product, Jira Key, Jira Status, Sprint, Release, Story Points, Progress, Duration, Complete Date, Status (set to Open), and Scheduling (set to As soon as possible). A separate panel on the far right, titled 'Other Details', shows the Task/Feature ID as 2496996567 and the Owner as Jennifer Rose, Lamar McMe...

Info	#	Outline	Title	Categ...	Start Date	Target Date	Duration	Pre...	Priority
	1	1	Initiation Phase	Task	12/2/2020 9:00 AM	12/11/2020 ...	8 days		
	5	2	Planning Phase	Task	12/20/2020 5:00 PM	1/1/2021 9:...	8 days		
	11	3	Requirements Analysis Phase	Task	1/1/2021 9:00 AM	1/8/2021 5:...	5 days		
	14	4	Design Phase	Task	1/11/2021 9:00 AM	1/12/2021 5:...	2 days	11	
	19	5	Development Phase - WebDe...	Task	1/13/2021 9:00 AM	1/27/2021 ...	10 days	14	
	20	5.1	Planned/Backlog	Sprint	1/13/2021 9:00 AM	1/13/2021 9:...	0 days		
	24	5.2	Sprint 1	Sprint	1/20/2021 9:00 AM	1/26/2021 ...	5 days		0: Eme
	25	5.2.1	User Story G	Story			1 day		4: Low
	26	5.2.2	User Story H	Story			5 days		3: Med
	27	5.2.3	User Story I	Story			3 days		2: High
	28	5.2.4	User Story J	Story					
	29	5.3	Sprint 2	Sprint	1/27/2021 9:00 AM	1/27/2021 ...	0 days		2: High
	30	5.3.1	User Story J	Story			0 days		2: High

Enhancement – Token-based Authentication for WS API

Generate an authentication token for WS API user type:

- Used any place in WS API in lieu of the user's password
- Can bypass calling the Login method; instead provide the token directly in the SOAP payload
- Provides more secure and efficient access

The screenshot displays the Planview Users management interface. A table lists users, with 'Marymont, Lindsey' selected. The 'Actions' menu is open, showing the 'Generate Token' option. A modal dialog titled 'User Token' is displayed, providing the token value: oKD8rbqxmOBCJLLzV4QqBA.

Users (1)

+ Viewed +WS API User

Resource	Login	Us...	Timesheet Activation Date
Marymont, Lindsey	apiuser_bronze	WS...	11/23/2015

Marymont, Lindsey

Save Save & Add to Groups Cancel Actions

History Layout Print Generate Token

User Token

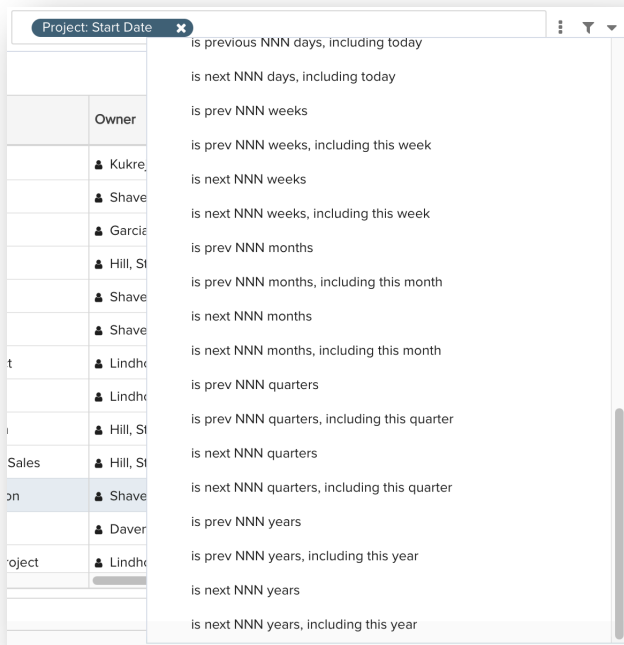
This is the only time you will be shown the user token. Please copy it and protect it like you would a password.

oKD8rbqxmOBCJLLzV4QqBA

OK

Enhancement – Relative Date Filters (December 2020)

More comprehensive relative date filter options



Coming (or Going) Soon!

IE11 support

- **Effective December 31, 2020** we are offering **very** limited support:
 - We will no longer be testing IE11.
 - Only critical bugs reported by customers will be triaged, with no guarantee of a fix.
- We will completely stop support as of **March 31, 2021**.



Upcoming Webinars/Events

- February Release Webinar February 17th
- Register for next six months of webinars in advance
- [https://success.planview.com/Planview_PPM_Pro/Release_Information/Customer Webinars](https://success.planview.com/Planview_PPM_Pro/Release_Information/Customer_Webinars)

PRODUCT RELEASES

Planview PPM Pro Customer Webinars

Page restriction: Public

2021

1/13/2021: January Release | [Register](#)
2/17/2021: February Release | [Register](#)
2/24/2021: Q1 Roadmap Webinar | Register (Coming soon!)
3/17/2021: March Release | [Register](#)
4/14/2021: April Release | [Register](#)
5/19/2021: May Release | [Register](#)
5/26/2021: Q2 Roadmap Webinar | Register (Coming soon!)
6/16/2021: June Release | [Register](#)
7/14/2021: July Release | [Register](#)
8/18/2021: August Release | Register (Coming soon!)
9/15/2021: September Release | Register (Coming soon!)
10/13/2021: October Release | Register (Coming soon!)
11/17/2021: November Release | Register (Coming soon!)

Q&A

Sherrill spackebush@planview.com

Jennifer jrose@planview.com



Thank You