



# PPM Pro Customer Webinar: February 2021 Release

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



# PPM Pro Customer Webinar: February 2021 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

- New Reports grid with Group By
- New WYSIWYG report designer
- 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)
- Drilldown floating window option
- List: Basic option to wrap column titles

## 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 – Drilldown Floating Window Option

Planview PPM Pro PORT - Projects by Business Objective

Save Save & Run Cancel ↺ ↻

Design

General Data Display Variable Settings Team

Headings

Data

Legend

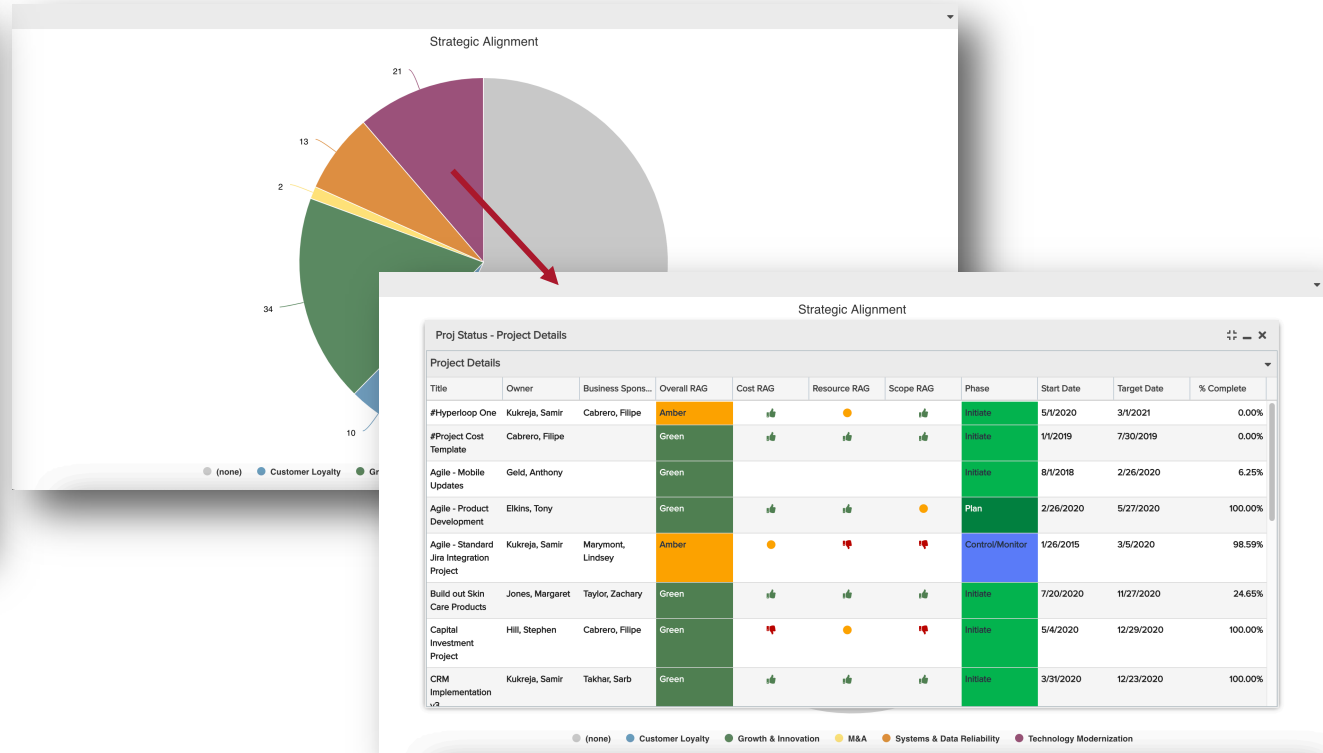
Sorting

Drill Down

Field	Drill Down	Report/Dashboard	Appears
Count	Report	Proj Status ...	Floating

New tab

Floating window



# Reports – List: Basic Wrap Column Titles

Design

General Data **Display** Variable Settings Team

Headings

Container Title:

☒ Wrap column titles

General **Data** Display Variable Settings Team

Objective

Priority

Priority Project

Start Date

Status

Target Date

Standard User-Defined Calculated

List Fields (maximum 1000 fields)

Move Up Move Down

Title

% Complete

Status

Start Date

Target Date

Title	% Co...	Status	Start Date	Target D...	Overall R...	Resource...	Scope RAG	Cost RAG	Actu...	ID	Total ...	Milestone	Task Stat...	Task ...	Task Star...	Task Targ...	Task Prio...
# Stage Gate Template	0.00%	Archive	4/7/2020	8/31/2020					0.00	2426881...	\$50,000...						
												Gate 1	Open	0.00	4/21/202...	4/21/202...	
												Gate 2	Open	0.00	5/13/202...	5/13/202...	
												Gate 3	Open	0.00	6/18/202...	6/18/202...	
												Gate 4	Open	0.00	7/31/202...	7/31/202...	
												Gate 5	Open	0.00	8/24/202...	8/24/202...	
#CW Template	0.00%																
#Hyperlo... One	0.00%																
#JIRA Template	0.00%																
													Gate 1	Open	0.00	4/21/202...	4/21/202...
													Gate 2	Open	0.00	5/13/202...	5/13/202...
													Gate 3	Open	0.00	6/18/202...	6/18/202...
													Gate 4	Open	0.00	7/31/202...	7/31/202...
													Gate 5	Open	0.00	8/24/202...	8/24/202...
#CW Template	0.00%	Archive	4/28/2020	12/31/2020					0.00	2048686...	\$54,000...						
													Project Kick-Off	Open	0.00	4/28/202...	4/29/202...
#Hyperlo... One	0.00%	Active	5/1/2020	3/1/2021	Amber	Amber	Green	Green	25.00	1769955...	\$56,600...						
#JIRA Template	0.00%	Archive	4/9/2020	4/9/2020	Green				0.00	2469296...	\$0.00						

# 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

## 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 – New Dashboards Cookbook on CSC

[https://success.planview.com/Planview\\_PPM\\_Pro/066\\_Dashboards\\_Revamp/Dashboards\\_\(Beta\)\\_Cookbook](https://success.planview.com/Planview_PPM_Pro/066_Dashboards_Revamp/Dashboards_(Beta)_Cookbook)

DASHBOARDS REVAMP (BETA)

**Dashboard (Beta) Cookbook**

Page restriction: Public

collapse all expand all

Planview PPM Pro

Getting Started

Responding Quickly in Times of Change

Getting the Most out of PPM Pro

PPM Pro Entities

Time Management

PPM Pro for Mobile

Reporting Revamp (Beta)

**Dashboards Revamp (Beta)**

Setting Up Overview Dashboards (Beta)

Dashboards Rolling Beta Support Topics

Dashboard Basics

Using the Dashboard Designer (Beta)

Publishing Dashboards (Beta)

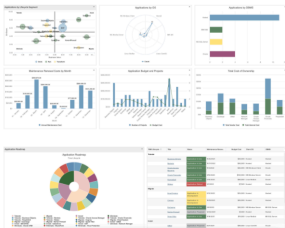

**Dashboard (Beta) Cookbook**

Application Portfolio Management Dashboard

Demand Management Dashboard

The purpose of this topic is to provide an example set of dashboards and steps to configure them (recipes) within the new dashboards beta, so that you can get a feel for the possible and also backwards engineer various dashboards. If you have any questions about any of the following or other new beta dashboard needs not addressed here, are looking for a specific recipe that has not yet been included, or have a recipe you would like to share, please contact [productmanagement-ppmpro@planview.com](mailto:productmanagement-ppmpro@planview.com).

### Dashboard Recipes

#	Sample Visualization	Dashboard
1		<b>Application Portfolio Management Dashboard</b> - Overview of applications by life cycle, operating system, data base management system, maintenance renewal costs by month, budget cost and project, total cost of ownership, and application roadmap
2		<b>Demand Management Dashboard</b> - Summary of requested project and other work, including requests by gate, risk versus value, portfolios impacted, portfolio cost analysis, and request detail

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# 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)
- EAC, ETC, NPV, ROI

## Future Releases

- Rollups and reporting
- Copy financial summary structure to other projects
- Change Settings, View As, and other tail items

# Financial Summary – ETC, EAC, NPV, ROI

- Adjust organization defaults:
  - ETC/EAC and NPV calculations
  - Field inclusion in NPV and ROI calculations
- Override in project financial summary:
  - ETC/EAC and NPV calculations
  - Field inclusion in NPV and ROI calculations
- Display ETC and EAC as columns
- Display ETC, EAC, NPV, ROI in details
- Report on ETC, EAC, NPV, ROI

The screenshot shows the 'Financial Summary Components' configuration window in Planview PPM Pro. The left sidebar lists sections: Organization, Reports (Beta), Dashboards (Beta), All Divisions, All Departments, Manage Time, and Finance. The 'Finance' section is expanded, showing 'Financial Summary Components', 'Internal Rates', and 'Settings'. The 'General' tab is active, displaying the 'Data Streams' table and the 'Estimate to Complete (ETC) and Estimate at Completion (EAC)' section.

**Financial Summary Components**

**General** Fields

Save Cancel

**Data Streams**

Move Up Move Down

Allow	Data Stream Description	Display Name
<input checked="" type="checkbox"/>	Approved amount of cash inflow/outflow	Budget
<input checked="" type="checkbox"/>	Expected amount of cash inflow/outflow	Forecast
<input checked="" type="checkbox"/>	Actual amount of cash inflow/outflow	Actuals

**Estimate to Complete (ETC) and Estimate at Completion (EAC)**

☒ Calculate EAC as BAC/CPI. Calculate ETC as EAC - Actual Cost.  
☐ Calculate EAC as ETC + Actual Cost.  
Calculate ETC as Total Forecasts - Actual Cost when this difference is a positive value, else, it is just all future Forecasts.  
☐ Calculate EAC as ETC + Total Cost.  
Calculate ETC as Total Forecasts - Total Cost when this difference is a positive value, else, it is just all future Forecasts.

**Net Present Value (NPV)**

NPV is calculated as the difference between the present value of cash inflows and the present value of cash outflows over a period of time given a discount rate.

Calculate for 5 Months  
Discount rate (%) 12

# 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 Q1 Roadmap webinar February 24<sup>th</sup>
- March Release webinar March 17<sup>th</sup>
- 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



### 2021

#### Monthly Release Webinars

1/13/2021: January Release | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)

2/17/2021: February Release | [Register](#)

3/17/2021: March Release | [Register](#)

4/14/2021: April Release | [Register](#)

5/19/2021: May Release | [Register](#)

6/16/2021: June Release | [Register](#)

7/14/2021: July Release | [Register](#)

8/18/2021: August Release | [Register](#)

9/15/2021: September Release | [Register](#)

10/13/2021: October Release | [Register](#)

11/17/2021: November Release | [Register](#)

#### Other Webinars of Interest

1/14/2021: How to Go from Doing Agile to Being Agile with Planview | [View Presentation](#) | [Presentation Slides](#)

2/24/2021: Q1 Roadmap Webinar | [Register](#)

5/26/2021: Q2 Roadmap Webinar | [Register](#)

8/25/2021: Q3 Roadmap Webinar | [Register](#)



How likely are you to recommend Planview PPM Pro (formerly Innotas) to a friend or colleague?

Not likely 1 2 3 4 5 6 7 8 9 10 Very likely

Start My Review



#### Limited-Time Offer

Receive a \$50 Amazon gift card via email as our thank you when your TrustRadius review of Planview PPM Pro (formerly Innotas) is

published.

[https://www.trustradius.com/welcome/planview-ppm-pro?utm\\_medium=web&utm\\_source=VendorSourced&utm\\_campaign=2021-RaaS--amzn50-planview-badge-web&o=amzn50](https://www.trustradius.com/welcome/planview-ppm-pro?utm_medium=web&utm_source=VendorSourced&utm_campaign=2021-RaaS--amzn50-planview-badge-web&o=amzn50)

# Q&A

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Thank You