



Planview PPM Pro – Product Roadmap 2021 Q1 to 2021 Q4

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



Planview PPM Pro – Product Roadmap 2021 Q1 to 2021 Q4

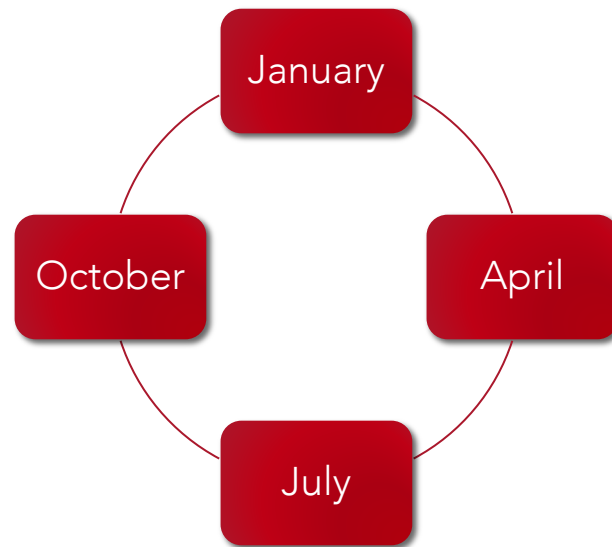
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Disclaimer

- The Roadmap represents the current state of planning, is provided for illustrative purposes only, and can be changed by Planview without notice.
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PPM Pro Release Cycle

- Weekly/Monthly
 - Defect fixes and enhancements
 - Beta roadmap feature capabilities
- Quarterly
 - General availability (GA) features
- Agile development
 - Beta and GA dates are squishy
 - Release when feature is ready



Q121-Q421 Roadmap Focus

- **Reports/Dashboards 2.0 (beta)**
 - Gantt Phases and Milestones*
 - High level Task Timeline*
- **Financial Summary (beta)**
- **LeanKit Int v2**
 - Projectplace Int v2
- Card View for other Entities
- Resource SSA
- User/Group/Unit Field Restrictions*
- Dependent Field Logic
- Alerts 2.0
- Push Sandbox to Production*
- OData Revamp
- Staffing SSA (revamp)*
- Spreadsheet Editor – SSA Entities*
- Reorder & 1-n Additional Details Project Sections*
- Archiving Projects*

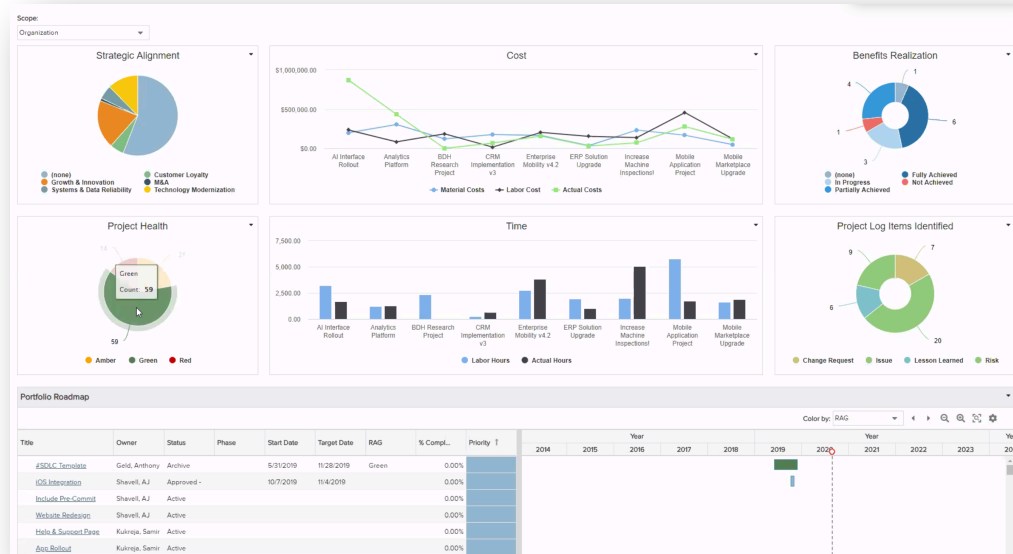
Reports 2.0/Dashboards 2.0 (in Beta)

Recently added to current beta:

- Scoring and Permissions specialty and topic reports
- Combination report type
- Hierarchy List reports
- Organization color lookup list
- Dashboard Home and Project Overview sections
- List: Stacked report type

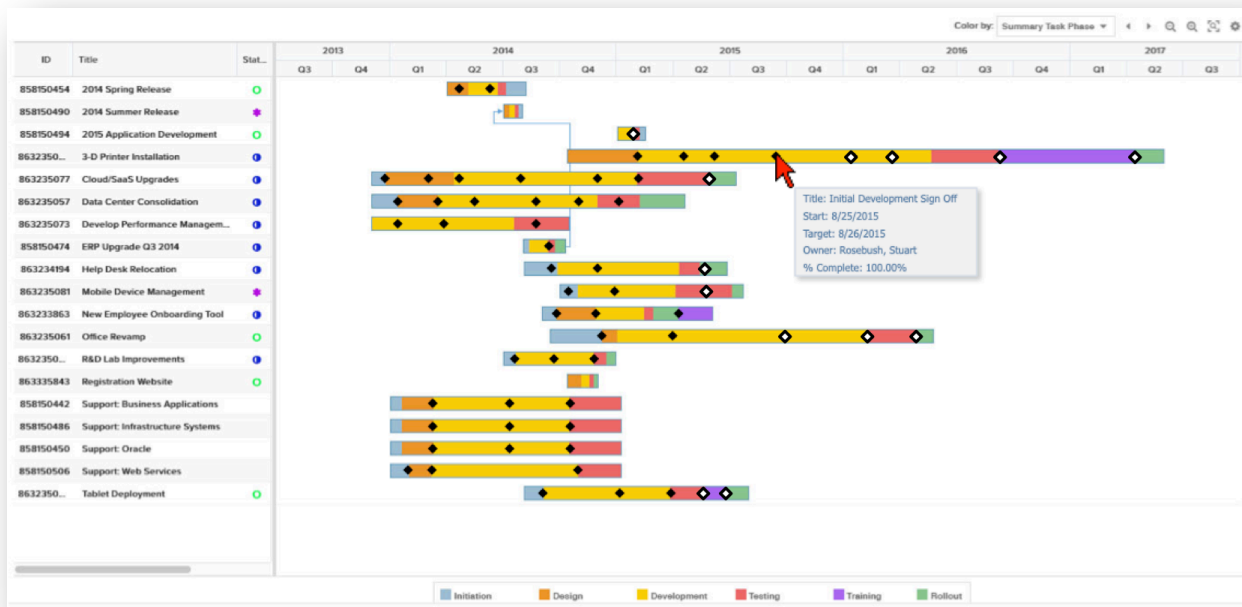
Up next in rolling releases:

- Publishing
- Planning and other Time Series



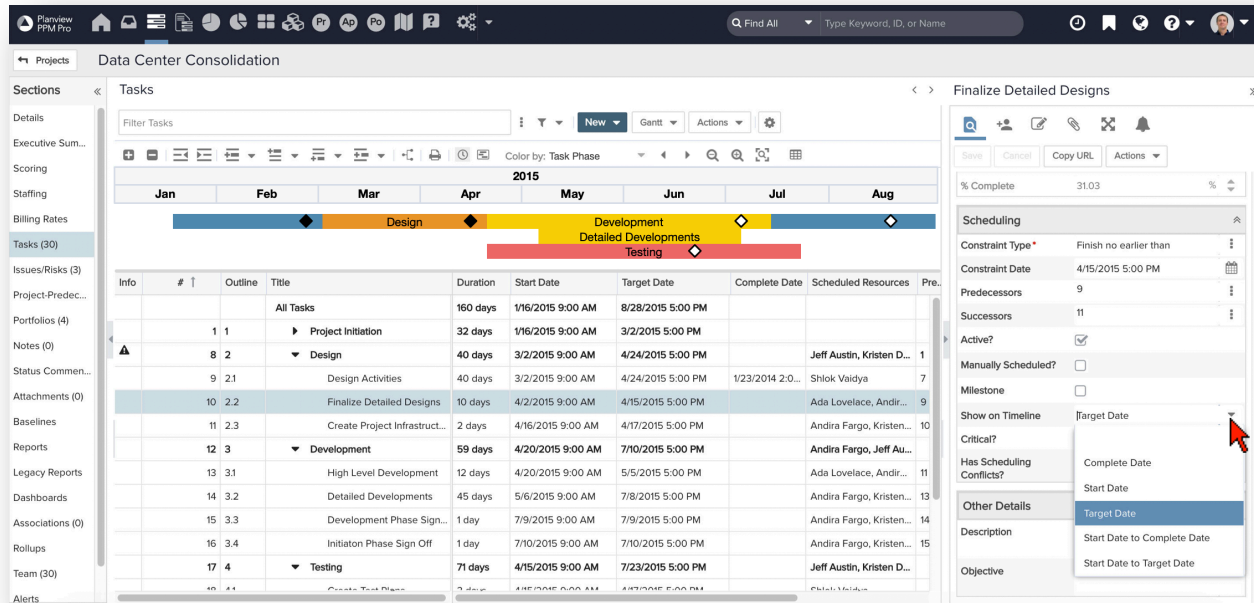
Gantt Phases and Milestones

Ability to show Milestone tasks and Phases on Project Gantt bars



High-Level Task Timeline

Option to show key tasks on a high-level timeline that can be shown above Tasks grid



Financial Summary (in Beta)

Planview PPM Pro

Home Issues/Risks Project Organization Admin

Find All Type Keyword, ID, or Name

Projects Flying Car Control System

Sections Financials

Details

Executive Sum...

Financials

Staffing

Tasks (28)

Project Logs (5)

Project-Predec...

Portfolios (1)

Notes (0)

Status Comm...

Attachments (0)

Baselines

Reports

Dashboards

Associations (2)

Team (19)

Alerts

Settings

Summary Financial Entries

Budget Forecast Actuals Edit Values Edit Structure Actions

Budget: \$ 330,000 NPV: \$ 458,734 ROI: 59.16

Title	Total Forecast	Total Actuals	ETC	EAC	2018					
					August		September		October	
					Forecast	Actuals	Forecast	Actuals	Forecast	Actuals
Total	9,247,000	(70,590)	189,660	318,750	(49,500)	(41,545)	(43,000)	(35,745)	6,500	6,700
Income	9,565,000	58,500			0	0	0	2,500	50,000	56,000
Product Revenue	7,650,000	0			0	0	0	0	0	0
Services	1,915,000	58,500			0	0	0	2,500	50,000	56,000
CapEx	158,000	79,900	78,850	158,750	32,000	25,300	26,000	23,000	26,000	31,600
Labor	127,000	57,100	69,900	127,700	20,000	16,000	20,000	19,600	20,000	21,500
Contractors	14,000	7,600	6,400	14,000	4,000	0	4,000	3,600	4,000	4,000
Employees	113,000	49,500	63,500	113,000	16,000	16,000	16,000	16,000	16,000	17,500
Material	18,000	18,750	0	18,750	10,000	8,450	4,000	2,500	4,000	7,800
Other	13,000	4,050	8,950	13,000	2,000	850	2,000	900	2,000	2,300
OpEx	160,000	49,190	110,810	160,000	17,500	16,245	17,000	15,245	17,500	17,700
Labor	148,000	46,900	101,100	148,000	16,000	16,000	16,000	14,900	16,000	16,000
Material	11,000	1,790	9,210	11,000	1,000	245	1,000	345	1,000	1,200
Other	1,000	500	500	1,000	500	0	0	0	500	500

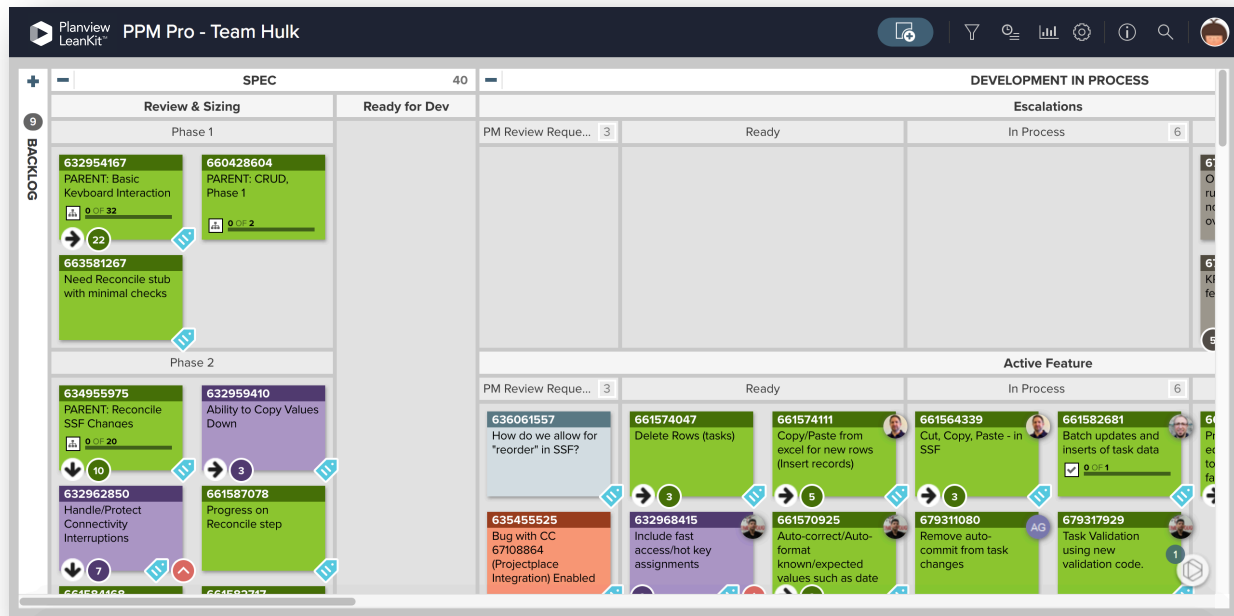
Recently added to current beta:

- EV, PV, AC, BAC, CPI, SPI, TCPI, CV, SV
- Negative financial entries
- EAC, ETC, NPV, ROI (February release)

Up next in rolling releases:

- Rollups and reporting
- Tail items such as Settings

LeanKit v2 Integration

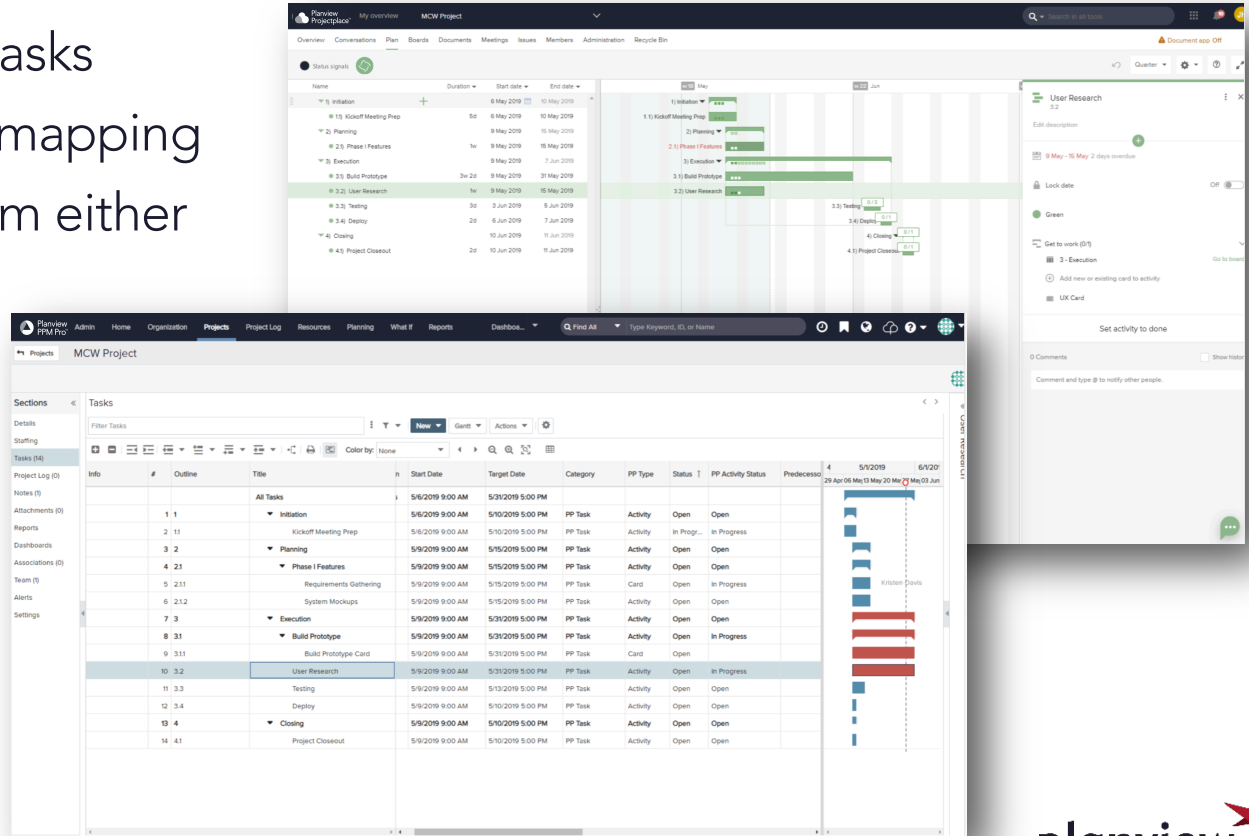


Mapping and data sync:

- LK cards with PPM Pro projects, tasks, possibly issues
- LK fields with PPM Pro entity fields

Projectplace v2 Integration

- Cards mapped to tasks
- Configurable data mapping
- WBS controlled from either solution



Resource SSA (Self-Service Admin)

Planview PPM Pro Home Resources Project Organization Admin

Find All Type Keyword, ID, or Name

Sections

- Organization
 - Permission Profiles
 - Users
- Groups
- Setup
 - Offices/Regions
 - Calendars
 - Lookup Lists
 - Skills
 - All Entities
 - People
 - Available Fields
 - Categories
 - Details**
 - Additional Details
 - User Details
 - Grid Columns
 - Searchable Fields
 - Filters
 - Trend Fields
 - Scoring
 - Publishing
 - Scheduled Jobs
 - Data Import
 - Web Services API

People Details

Category: Contractor

Available Fields

Type to Find Available Field

- Active
- Alternate for Timesheet Approval
- Billing Rate
- Can Edit Calendar
- Confirm Password
- Created By
- Department
- Description
- Division
- Effective Base Calendar
- Enterprise
- Full Admin
- Hire Date
- ID

Group Header:

Details

Move Up Move Down

- First Name
- Last Name
- Unit
- Primary Role
- Today's Internal Rate
- Capacity Multiplier
- Email
- Disable Alerts

Field: First Name

Save Cancel

Restrictions

Field Access Unrestricted - This field can be seen and/or used by anyone

Common Properties

Method ID 100442

Title First Name

Field Origin Standard

Description Person's first name.

Field Type String

Details Display Name

Variable Properties

Required ☐

Default Value

Show on New Yes

Show on Edit Yes - Editable

- Admin configurable entity
- Profile-based Permissions
- Standard groups (such as Organization, Resource) converted to permission profiles

Dependent Field Logic

Based on another field's value or other property

- Filter lookup list options
- Hide/show other fields
- Set a value on another field
- Make another field required

ID	1963916548
Title *	Customer Treats
Description	
Requester *	Entrekin, Caleb
Benefits	
Potential Business Value ↑	
Create Date	

High
Medium
Low

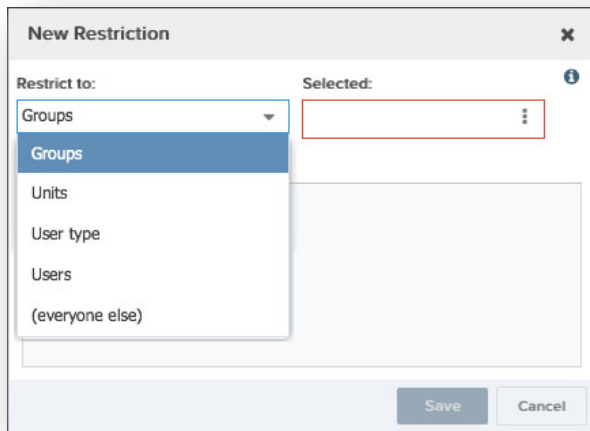
Will bring great things to the company



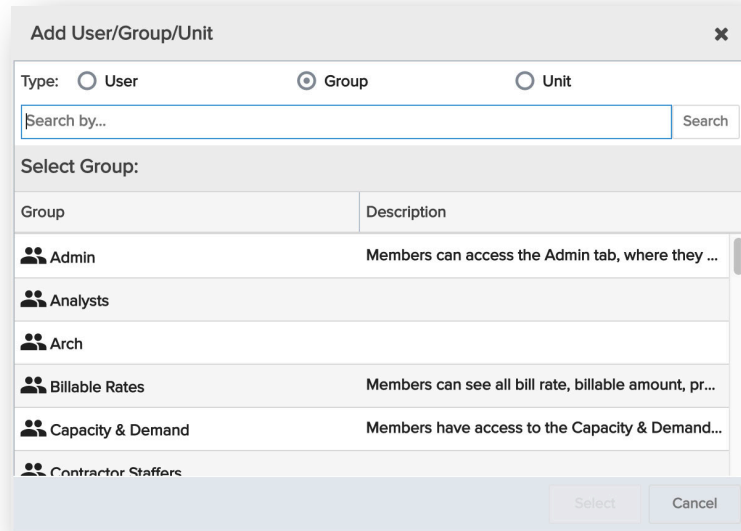
ID	1963916548
Title *	Customer Treats
Description	
Requester *	Entrekin, Caleb
Benefits	
Potential Business Value ↑	High
Business Objective	
Create Date	2/5/2019

User/Group/Unit Field Restrictions







Add Users, Groups, and Units to the “Restrict to” field*



The "New Restriction" dialog box features a "Restrict to:" dropdown menu with a list of options: Groups, Units, User type, Users, and (everyone else). The "Groups" option is currently selected and highlighted. To the right of the dropdown is a "Selected:" field, which is an empty rectangular box with a red border. At the bottom right of the dialog are "Save" and "Cancel" buttons.



The "Add User/Group/Unit" dialog box has three radio buttons for "Type": "User", "Group" (which is selected), and "Unit". Below these is a search bar labeled "Search by..." with a "Search" button. Underneath is a section titled "Select Group:" containing a table of groups.

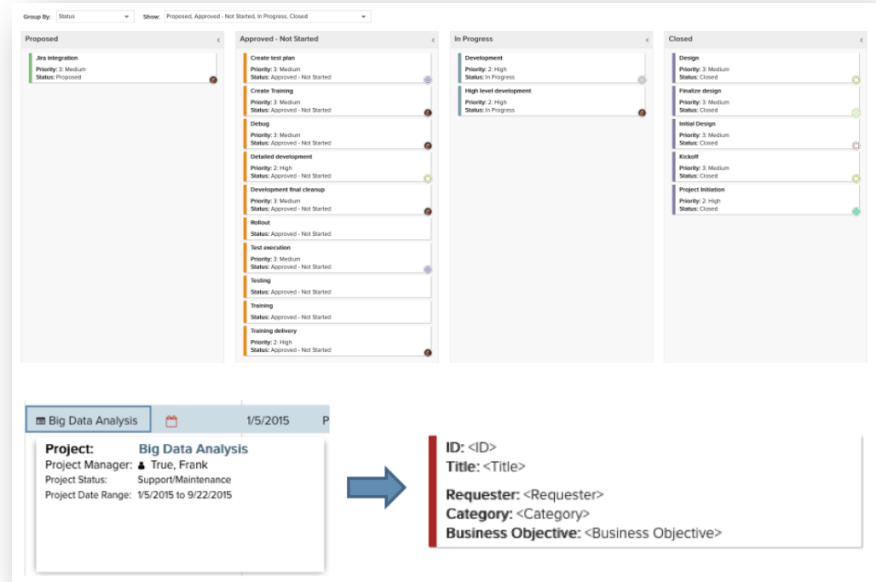
Group	Description
 Admin	Members can access the Admin tab, where they ...
 Analysts	
 Arch	
 Billable Rates	Members can see all bill rate, billable amount, pr...
 Capacity & Demand	Members have access to the Capacity & Demand...
 Contractor Staffers	

At the bottom right of the dialog are "Select" and "Cancel" buttons.

*Likely part of Dependent Field Logic

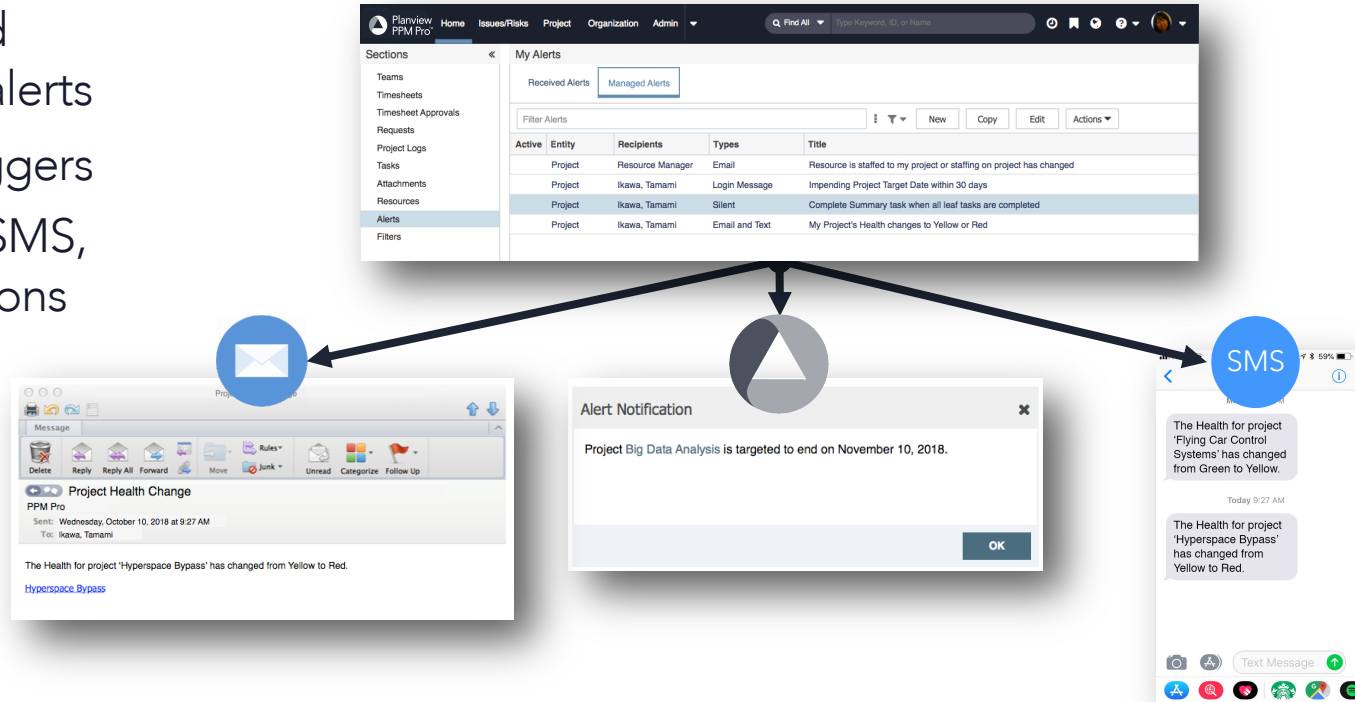
Card View for SSA Entities

- Kanban-style view
- Hide or show groupings/lanes
- Different Card views per category
- Control what information shows up on the Cards
- Possibly Quick View Card config



Alerts 2.0

- Easier, centralized management of alerts
- Customizable triggers
- Agnostic: email, SMS, browser notifications
- Advanced logic
- Alert resolution



OData Revamp

- New UI for identifying fields for OData feed
- Increase access/refresh to more than once a day/as needed
- Improve performance and data extraction size



Push Sandbox to Production

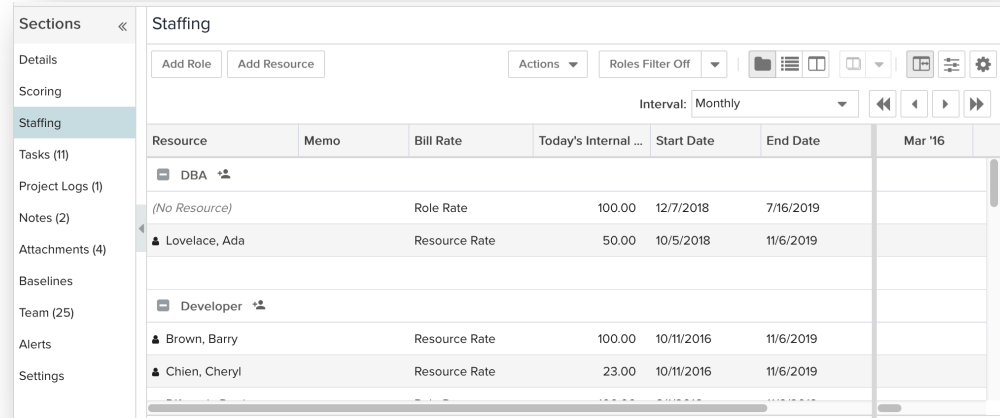
Transfer process and structural changes from the Sandbox into Production, TBD *what* but could be:

- Reports
- Dashboards
- Portfolios
- Request categories
- Calculated fields
- Admin items such as Permission Profiles, Lookup Lists, and others



Staffing SSA (Revamp)

- Available fields and grid column config
- Explicit Group By
- Ad hoc filter
- Bulk edit
- Potentially:
 - Show actuals option
 - Resource Workbench resource utilization view option



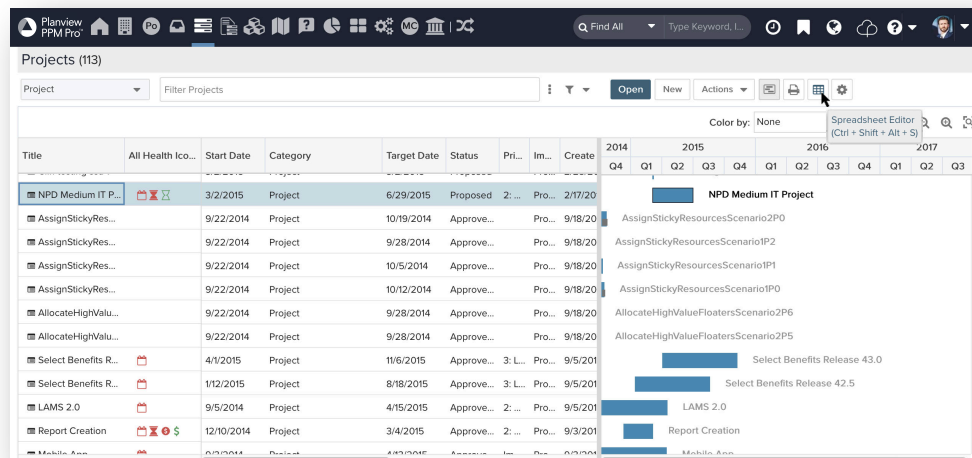
The screenshot displays the Staffing SSA (Revamp) interface. On the left is a sidebar with a 'Sections' menu containing: Details, Scoring, Staffing (highlighted), Tasks (11), Project Logs (1), Notes (2), Attachments (4), Baselines, Team (25), Alerts, and Settings. The main area is titled 'Staffing' and includes buttons for 'Add Role' and 'Add Resource', an 'Actions' dropdown, and a 'Roles Filter Off' dropdown. Below these is an 'Interval: Monthly' dropdown and navigation arrows. The table below has columns: Resource, Memo, Bill Rate, Today's Internal ..., Start Date, End Date, and Mar '16. The table is grouped by role: DBA and Developer. The DBA group shows a '(No Resource)' row and a row for Lovelace, Ada. The Developer group shows rows for Brown, Barry and Chien, Cheryl.

Resource	Memo	Bill Rate	Today's Internal ...	Start Date	End Date	Mar '16
DBA						
(No Resource)		Role Rate	100.00	12/7/2018	7/16/2019	
Lovelace, Ada		Resource Rate	50.00	10/5/2018	11/6/2019	
Developer						
Brown, Barry		Resource Rate	100.00	10/11/2016	11/6/2019	
Chien, Cheryl		Resource Rate	23.00	10/11/2016	11/6/2019	

Spreadsheet Editor – SSA Entities

For remaining Self Service Admin entities (Project Logs, Projects, and so on):

- Spreadsheet-style keyboard interaction
- Undo/Redo
- Copy/paste to and from other spreadsheet tools
- Text box editing
- Does not include entity contours



Reorder & 1-n Additional Project Sections

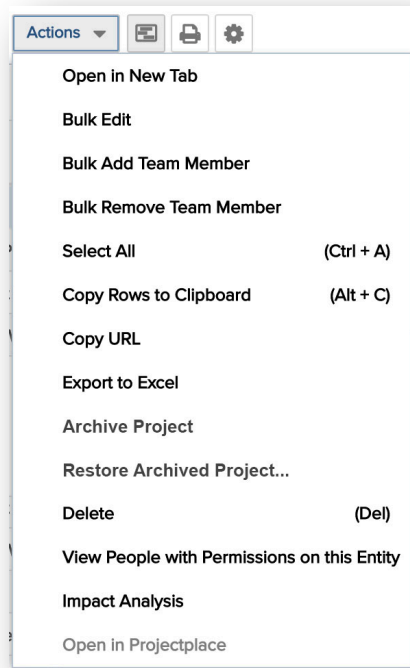
- Have 1-n Additional Details sections per project category
- Reorder these and other project sections per project category

The screenshot displays the Planview PM7 Pro interface for a project named 'Agrigenomics Solutions'. The left sidebar shows a 'Sections' menu with options like Gate 1, Gate 2, Gate 3, Gate 4, Gate 5, Scoring, Staffing, Tasks (43), Project Log (2), Project-Predecess., Portfolios (2), Notes (1), Status Comments, Attachments (1), Baselines, Reports, Dashboards, Associations (0), Rollups, Team (8), Alerts, and Settings. The main area is divided into several sections:

- Basic Details:** Includes fields for All Health Icons, ID (178315514), Title (Agrigenomics Solutions), Department (PMO), Owner (Green, Pat), Business Sponsor (Smith, Chris), Division (Enterprise), Category (Product Development), Product Type (New Market), Project Type (New Product), Priority (High), Scorecard (39.00), Priority Score (4), Competitive Advantage (Game Changer), Strategic Objective (Expand into new markets - 5% revenue incre...), Innovation Type (Breakthrough Innovation), Description (Catching up with the market on bottled cold brew), Revenue Target (\$ 15,000,000.00), Margin (\$14,975,000.00), and Objective (Create a bottled Cold Brew for Grocery chains).
- Progress:** Includes Status (Active), Stage (Scoping), Current Gate (Gate 1), Next Gate (Gate 2), Health (Red), Scope RYG (Yellow), Resource RYG (Yellow), Cost RYG (Red), Actual Hours (524.00), % Complete (20.00%), Revenue Realized (to Date) (\$), Key Accomplishments (Completed Gate 1 Review), and Next Steps (Working on Gate 2 Deliverables).
- ROI and NPV:** Includes WACC (10), Total Benefit (\$0.00), Total Forecasted Cost (\$218,650.00), ROI (-100.00%), Total Actual Cost (\$32,740.00), and NPV (\$0.00).

Archiving Projects

- “Archive Project” option:
 - Removes project and its child entities (tasks, project logs, and so on) from all views, portfolios, associations, filters, pick lists, and other general access
 - Timesheet data remains but is no longer linked to anything
 - Remaining resource demand not included in capacity/demand analyses
- “Restore Archived Project...” option
- Permissions for archiving and restoring archived projects



Customer Driven Product

Customer Inner Circles

User Experience

Reporting + Artifacts

PPM Pro Working Sessions

Customer Roadmap Challenges



Planview
Spigit™

Customer Enhancement Requests

planview™
customer success center

Customer Benefits

Participation in requirements, design, and prioritization

Early view into new functionality

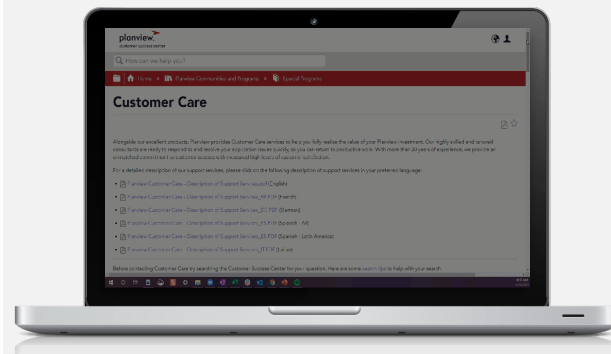
Direct access to other customers and Planview Product Management

Planview Benefits

Voice of the customer

Accurate, real-life use cases

Early feedback and results for high quality product outputs





Thank You