



PPM Pro Customer Webinar: March 2021 Release

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



PPM Pro Customer Webinar: March 2021 Release

Jennifer Rose, PPM Pro Product Manager
Sherrill Packebush, Sr PPM Pro Product Manager
Malika Taouil, Customer Marketing Manager (Moderator)
Stuart Baker, PPM Pro Solution Architect (Special Guest)

Housekeeping Items

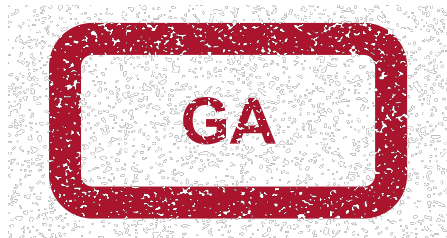
- 30-35 minutes of presentation
- Remainder Q&A
- All lines are on mute
- Enter questions into the Q&A box
 - If you can't see the chat box, click Q&A at the bottom right of the Zoom window
- Webinar is being recorded
- Recording and slides will be shared in post-webinar email, including additional info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

- 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
- Initial export to PowerPoint
- Drilldowns
- Specialty reports: Scoring and Permissions
- Organization color lookup list configuration
- Numerous new report types
- Field Options 'Display Data As'
- Drilldown floating window option
- List: Basic option to wrap column titles
- List: Basic merge child rows
- Pie and Donut Display format options
- New type: Pie: Crosstab
- New type: Combination: Stacked Area, Stacked Column, Line
- Report Owner field

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, few others
- Capacity and demand report
- Calc fields for secondary entities
- Additional report types and tail items

Reports – List: Basic Merge Child Rows

Combine entity data on the same row

Preview ⓘ					
Title	Start Date	Priority	Owner	Request	Requester
Project 10000	03 Mar 2021	3: Low	McGuire, Shane		
				Request 10020	
				Request 10021	
				Request 10022	
				Request 10023	
Project 10001	28 Sep 2020	3: Low			
				Request 10024	
				Request 10025	
Project 10002	17 Oct 2020	3: Low	Packebush, Sherrill		
				Request 10026	
				Request 10027	

Title	Start Date	Priority	Owner	Request	Requester
#JIRA Template	09 Apr 2020		Kukreja, Samir	Onboarding System Set-Up	Lindhoff, Euon
04 - Mobile Banking Module			04, Agile	Change Request for v4	Hood, Ben
05 - Mobile Banking Module			05, Agile	Cloud Uplift	Geld, Anthony
Branded Oral Care Products	12 Oct 2020	1: High	Hill, Stephen	Branded Oral Care Products	Shaughn, Jorge
Consulting Services	15 Jun 2020	1: High	Geld, Anthony	Analytics Platform	Lindhoff, Euon
CRM Implementation v3	31 Mar 2020	0: Immediate	Kukreja, Samir	CRM Implementation v3; ITSM Enhancement	Kukreja, Samir; Shaughn, Jorge
Financials Module			Kukreja, Samir	Financials Module	Shaughn, Jorge
Increase Machine Inspections!	01 Apr 2020	3: Low	Christianson, Susanna	Technical Issue has pushed out target date	Shaughn, Jorge
Inventory Management			Shaughn, Jorge	Inventory Management	Shaughn, Jorge
IT/Marketing Initiative	10 Feb 2020	3: Low	Lindhoff, Euon	IT/Marketing Collaboration Initiative	Avery, Linda
Lean Six Sigma Project	20 Apr 2020	2: Medium	Nauyalis, Carrie	Increase scope for Lean Six Sigma Project	Megel, Eric
Mobile Application Project	20 May 2020	2: Medium	Hill, Stephen	Mobile Application Project; Mobile Application Project	Dailey, Maria; Jobanputra, Leena
NextGen Mobile Application	01 Apr 2020	1: High	Kukreja, Samir	NextGen Mobile Application	Dailey, Maria
NextGen Secure Design	27 Mar 2019	1: High	Shaughn, Jorge	NextGen Secure Design	Shaughn, Jorge
Onboarding System Set-Up	23 Apr 2020	1: High	Hill, Stephen	Onboarding System Set-Up	Hood, Ben
X Lab	10 Feb 2021	1: High	Kukreja, Samir	Analytics Platform	Lindhoff, Euon

Reports – Pie & Donut Display Format Options

Design

General Data **Display** Variable Settings Team

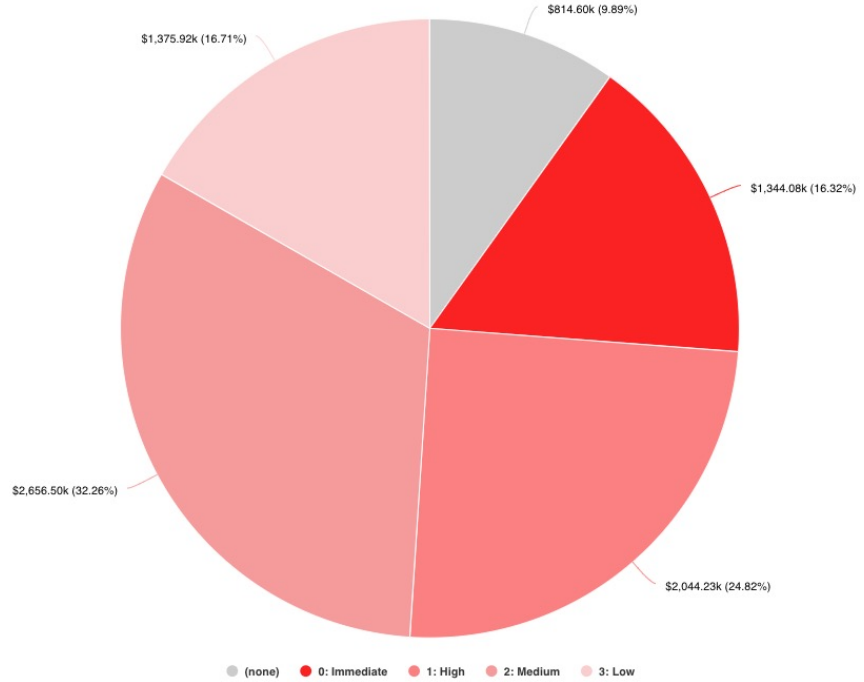
Subheading position:
Center Align

Subheading font: Helvetica Style: Normal Size: 12

Data

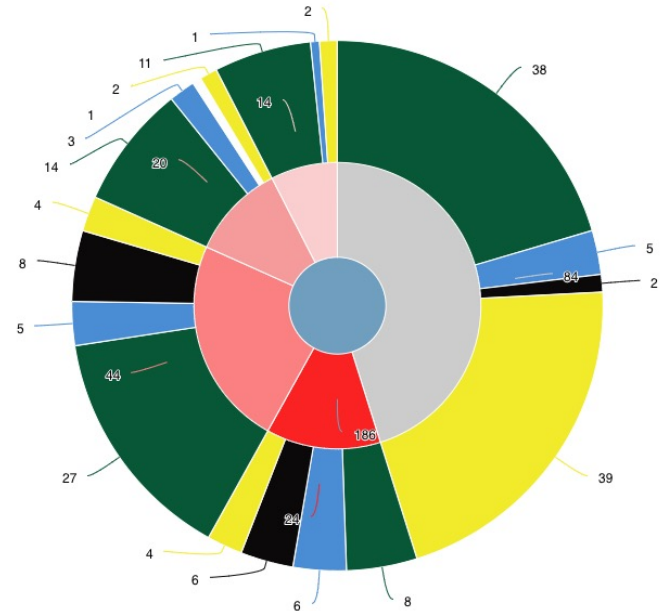
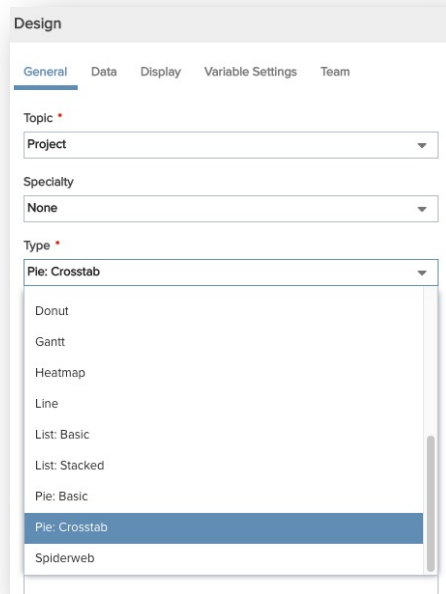
Data values:
Do not show

- Do not show
- Value \$0,000
- Value \$0,000.00
- Value \$0k
- Value \$0.00k
- Value \$0M
- Value \$0.00M
- Percentage 0%
- Percentage 0.00%



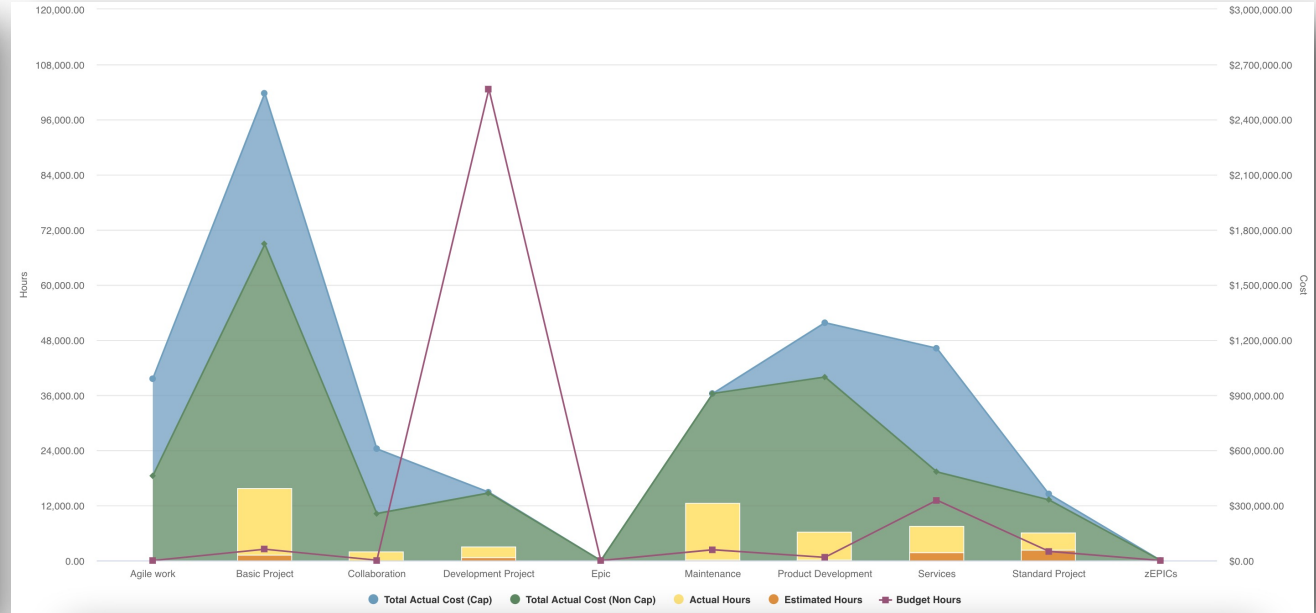
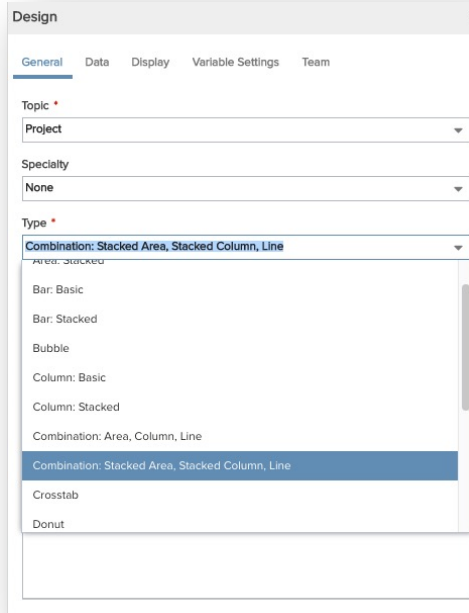
Reports – Pie: Crosstab

Like Donut when multiple Group By fields, but includes center count



Reports – Combination: Stacked Area, Stacked Column, Line

Like the Combination: Area, Column, Line type



Reports (and Dashboard) – Owner Field

Useful for permissions

The screenshot shows the 'Design' tool interface with the following configuration:

- Topic:** Project
- Specialty:** None
- Type:** Pie: Basic
- Title:** MAR demo Pie and Donut Format + Crosstab
- Description:** (Empty text area with rich text formatting tools)
- Owner:** Geld, Anthony

The screenshot shows the 'Reports (Beta) (125)' interface. A context menu is open for the report 'MAR demo Pie and Donut Format + Crosstab', displaying the following options:

- Run
- Edit (F2)
- Copy
- Bulk Add Team Member
- Bulk Remove Team Member
- Bulk Change Owner**
- View People with Permissions (Change the owner of the selected entities.)
- Delete (Del)

Title	Description	Owner
Project role and resource time		Geld, Anth
Test Project + Request data		Geld, Anth
MAR demo Pie and Donut Format + Crosstab		Geld, Anth
Capex vs Opex		Geld, Anth
Applications - Total Cost of Ownership		Geld, Anth
Portfolio Budget and Projects		Geld, Anth
Financial Entries by Category		Geld, Anth
FEB demo - Wrap column title in Project Status report		Geld, Anth
FEB Demo - floating drill down Projects by Business O		Geld, Anth
PORT - Portfolio Hierarchy Extended		Geld, Anth
task time and project test		Geld, Anth

Dashboards Revamp – Rolling Beta

Current Beta Functionality

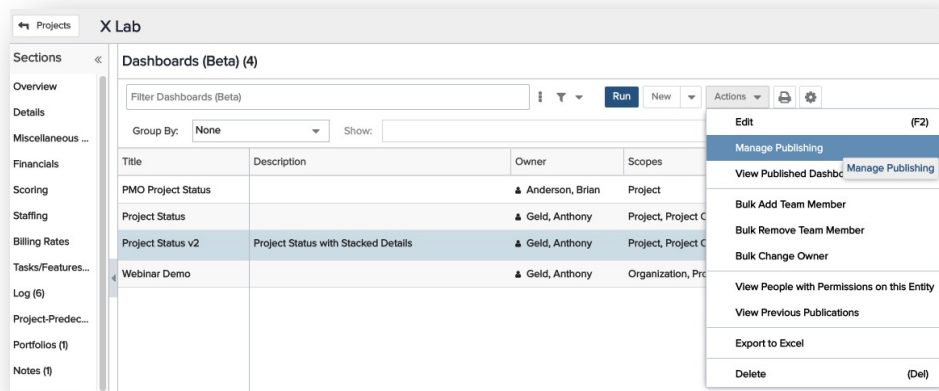
- New Dashboards grid with Group By
- WYSIWYG dashboard designer, with ability to drag and drop or click “Add” button to add a report to the dashboard
- Scope tab with ability to specify what entity dashboard grids the dashboard shows up on
- Preview - able to move reports around, resize, and remove
- 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
- Initial dashboard publishing
- Access to previously published dashboards
- Dashboard owner field

Future Releases

- Published dashboard expiration notifications
- Published dashboard notification customizable text link
- Hourly publishing option
- Admin Publishing grid
- Rich text/image content (for example, company logo)
- Tail items

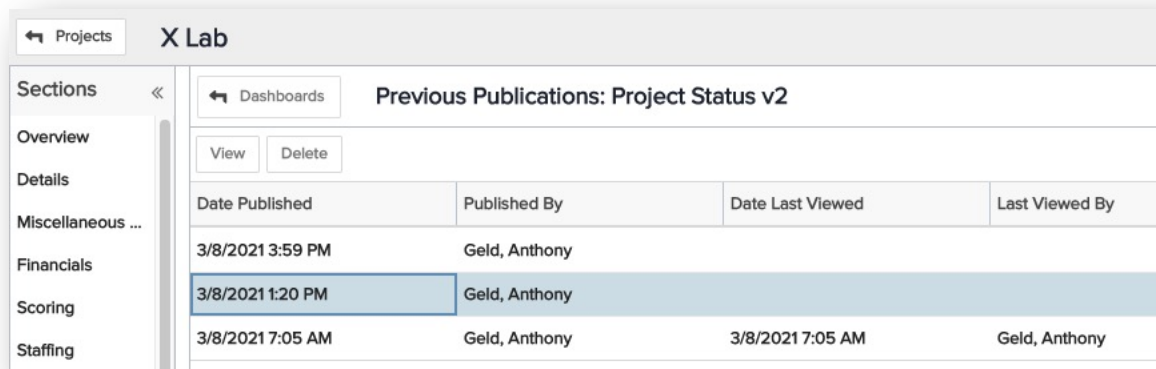
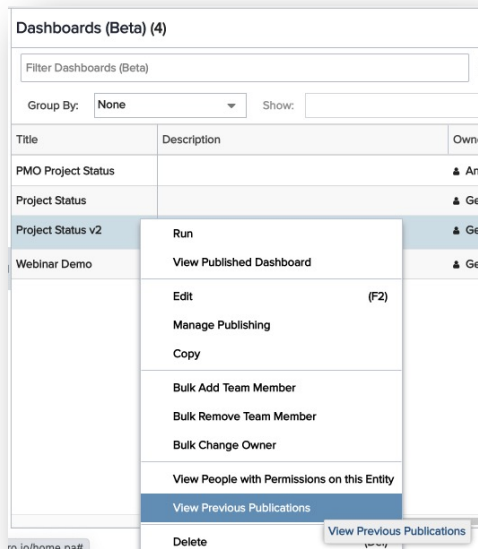
Initial Dashboard Publishing

- Once per Dashboard grid (except not at top-level)
- Publish as user, not owner
- Publish any time of day
- Notify resources filter
- Notify up to 100 emails
- Schedule expiration based on number of publications



Access to Previously Published Dashboards

- View previous publications
- Anything reportable can now effectively be baselined



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

New Project Enhancement

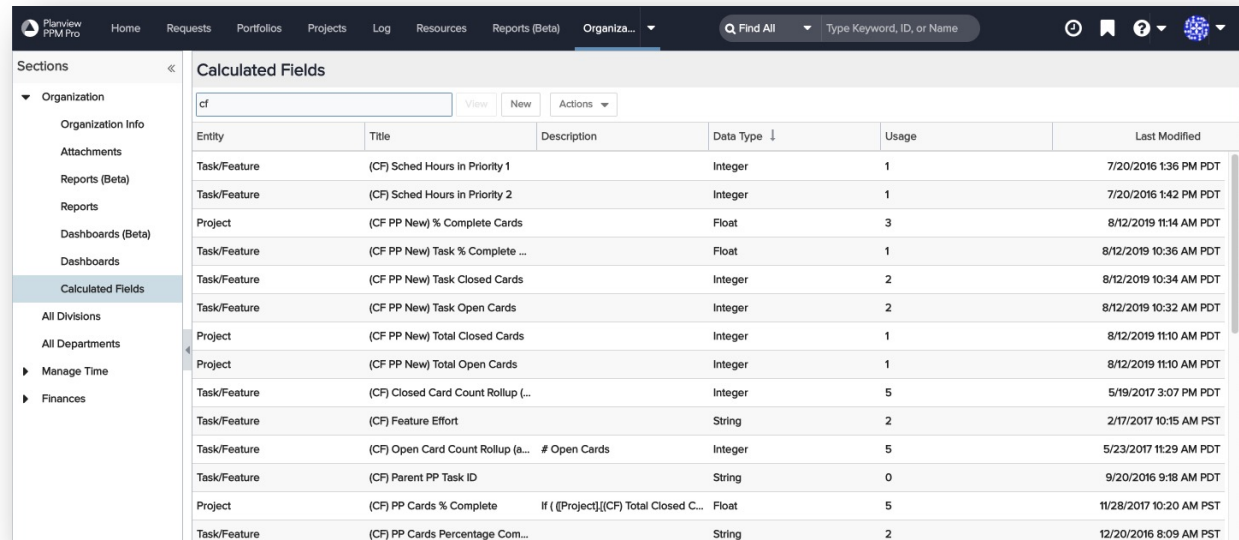
Option to ensure new projects can **only** be created from Requests, Data Import, or API (contact Customer Care)

The screenshot displays the Planview PPM Pro interface. The top navigation bar includes links for Home, Requests, Portfolios, Projects, Log, Resources, Reports (Beta), and Admin. A search bar labeled 'Find All' is present, along with icons for help, notifications, and a user profile. Below the navigation bar, the 'Projects (186)' section is visible, featuring a filter dropdown set to 'All Categories' and a search input field. A table of projects is shown with columns for Title, Owner, Score, Priority, Overall R..., Stage, Status, Start Date, and Completion Date. The table lists several projects, including 'Year End Project', 'X Lab', 'Website Redesign', 'Website Migration', 'WAN Project', 'Uptime Risk Analysis', 'Toolbar Functionality', and 'Test Next Release Date'. A modal window titled 'Fun Project Request' is open in the foreground, showing tabs for Details, Notes (1), Attachments (0), Associations, Scoring, and Activity Log (7). The 'Associations' tab is selected, displaying a section for 'Associated Projects (0)' with a table that has columns for Title, Priority, Status, Overall R..., Start Date, Target Date, Business Objective, Cat..., Score, and Labor Hours. The table is currently empty, and a message states 'There are no associated Projects for this Request'. The modal also includes buttons for 'Add', 'New', and 'Actions'.

Title	Owner	Score	Priority	Overall R...	Stage	Status	Start Date	Completion Date
Year End Project	Geld, Anthony					Active	12/2/2020	
X Lab	Kukreja, Samir	35.00	1: High	Red		Active	2/10/2021	
Website Redesign	Shaughn, Jorge					Active		
Website Migration	Garcia, Maritza	0.00	1: High	Green		Archive	6/1/2020	
WAN Project	Hill, Stephen		1: High	Green		Active	5/4/2020	
Uptime Risk Analysis	Shaughn, Jorge					Proposed		
Toolbar Functionality	Shaughn, Jorge					Active		
Test Next Release Date	Geld, Anthony					Active		

Calculated Fields Enhancements

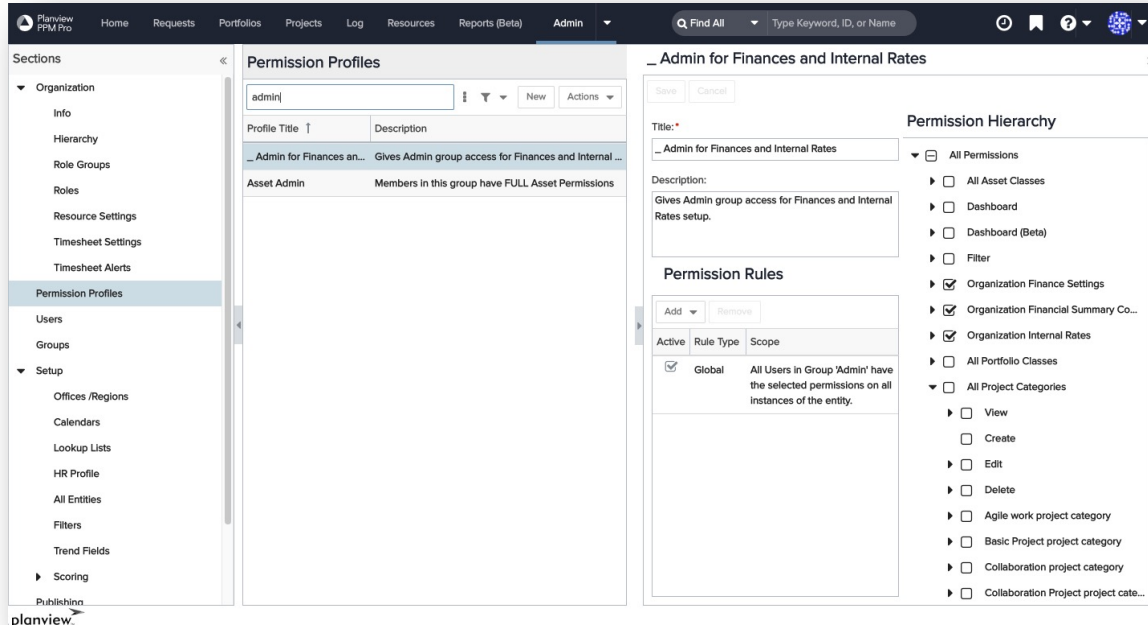
- Moved to Organization view
- Filter by Title



The screenshot displays the Planview PPM Pro interface. The top navigation bar includes links for Home, Requests, Portfolios, Projects, Log, Resources, Reports (Beta), and Organization. A search bar on the right allows finding items by keyword, ID, or name. The left sidebar shows a tree view of sections, with 'Calculated Fields' selected under the 'Organization' section. The main content area is titled 'Calculated Fields' and contains a table with the following columns: Entity, Title, Description, Data Type, Usage, and Last Modified. The table lists various calculated fields, such as 'Sched Hours in Priority 1', 'PP New % Complete Cards', and 'Closed Card Count Rollup'.

Entity	Title	Description	Data Type	Usage	Last Modified
Task/Feature	(CF) Sched Hours in Priority 1		Integer	1	7/20/2016 1:36 PM PDT
Task/Feature	(CF) Sched Hours in Priority 2		Integer	1	7/20/2016 1:42 PM PDT
Project	(CF PP New) % Complete Cards		Float	3	8/12/2019 11:14 AM PDT
Task/Feature	(CF PP New) Task % Complete ...		Float	1	8/12/2019 10:36 AM PDT
Task/Feature	(CF PP New) Task Closed Cards		Integer	2	8/12/2019 10:34 AM PDT
Task/Feature	(CF PP New) Task Open Cards		Integer	2	8/12/2019 10:32 AM PDT
Project	(CF PP New) Total Closed Cards		Integer	1	8/12/2019 11:10 AM PDT
Project	(CF PP New) Total Open Cards		Integer	1	8/12/2019 11:10 AM PDT
Task/Feature	(CF) Closed Card Count Rollup (...)		Integer	5	5/19/2017 3:07 PM PDT
Task/Feature	(CF) Feature Effort		String	2	2/17/2017 10:15 AM PST
Task/Feature	(CF) Open Card Count Rollup (a... # Open Cards		Integer	5	5/23/2017 11:29 AM PDT
Task/Feature	(CF) Parent PP Task ID		String	0	9/20/2016 9:18 AM PDT
Project	(CF) PP Cards % Complete	If ([Project]([CF) Total Closed C...	Float	5	11/28/2017 10:20 AM PST
Task/Feature	(CF) PP Cards Percentage Com...		String	2	12/20/2016 8:09 AM PST

Permission Profiles Enhancements



- Ad hoc filter
- Resizable splitter

Excel Export Enhancements

- Lookup List and Lookup List Values grids
- Roles grid

The screenshot displays the Planview PPM Pro interface. On the left is a navigation sidebar with sections like Organization, Setup, and Scoring. The main area is divided into two panels. The left panel, titled 'All Lookup Lists (124)', contains a table with columns ID, Title, and Type. The right panel, titled 'List Values: Organization Color Palette', contains a table with columns Default, ID, Title, Description, and Color. A context menu is open over the right panel, showing options like 'Reorder Ascending (A-Z)', 'Reorder Descending (Z-A)', 'Reorder by ID', 'Make Inactive', and 'Export to Excel'.

ID	Title	Type
8827160	Log Complexity	Standard
8827065	Log Phase	Standard
8827087	Log Priority	Standard
8827201	Log Status	Status
8826982	Log Type	Standard
1716097479	Market Growth Rate	User Defined
1716098117	Market Size	User Defined
1678000259	New Lookup List	User Defined
1716098638	Next Gate	User Defined
1749740247	NPD h/m/i/u	User Defined
1716099173	NPD Scoring Picklist (10-0)	User Defined
1764414397	NPV Year	User Defined
2482179682	OKR Type	User Defined
589231830	Operating System	User Defined
24969824...	Organization Color Palette	Standard
467589908	Payback Period	User Defined
18573767	Portfolio Status	Status
158707829	Priority List	User Defined

Default	ID	Title	Description	Color
✓	2496982466	other-gray-light	This default list it...	#CCCCCC
	2496982467	blue-regular		#6F9EBF
	2496982468	green-darker		#5E8962
	2496982469	yellow-regular		#FFE47D
	2496982472	orange-darker		#E19240
	2496982470	ilac-darker		#9A547A
	2496982471	teal-regular		#7ABCBD
	2496982473	red-lighter		#F1C7C5
	2496982474	blue-darker		#437395
	2496982475	green-lighter		#8FDFC2
	2496982476	yellow-darker		#EBCA46
	2496982477	ilac-lighter		#D9BECD
	2496982478	teal-darker		#528E8F
	2496982479	orange-lighter		#FEE0C1
	2496982480	red-regular		#E58DBA
	2496982481	blue-lighter		#B8CFDF
	2496982482	green-regular		#8AB98E
	2496982483	yellow-lighter		#FFE47D

New PPM Pro Inner Circle!

https://info.planview.com/PPM-Pro-International_innercircle_prm_en_reg.html

- 10 am CET/2:30 pm IST
- 9 am Japan/1 pm New Zealand

PPM Pro International Inner Circle

Attention Planview Global Customers

The PPM Pro International inner circle is specifically for our global customers who often miss out on our regular customer monthly release and quarterly roadmap webinars due to time zone differences. Although those official webinars are recorded, watching them is not the same as actively learning about and seeing key enhancements and feature demos, as well as being able to have live questions and answers. Likewise for our quarterly roadmap webinars.

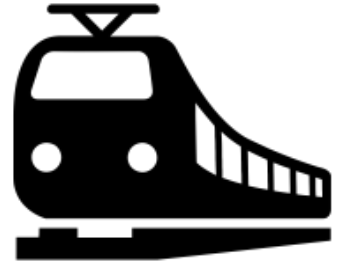
This inner circle will meet on the same days as our official monthly release and roadmap webinars, but at times more convenient for Central Europe/Middle East and again for Asia/Pacific. Please join this circle if you would like to receive meeting invites to these reprises of the monthly and quarterly customer webinars held at a more convenient time for our international customers. Please note that all sessions are conducted in English.



Coming (or Going) Soon!

IE11 support

- We will completely stop support as of **March 31, 2021.**



Upcoming Webinars/Events

- April Release webinar April 14th
- 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

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2021

Monthly Release Webinars

1/13/2021: January Release | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)
2/17/2021: February Release | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)
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 | [View PDF](#) | [View Presentation](#)
5/26/2021: Q2 Roadmap Webinar | [Register](#)
8/25/2021: Q3 Roadmap Webinar | [Register](#)

Virtual Planview Horizons Customer Conference 2021

Registration and **call for presenters** now open
planviewhorizons.com

- Early Bird through **June 25th**: \$249
- Regular: \$299



Q&A

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Thank You