



PPM Pro Customer Webinar: May 2021 Release

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



PPM Pro Customer Webinar: May 2021 Release

Sherrill Packebush, Sr PPM Pro Product Manager

Jennifer Rose, PPM Pro Product Manager

Stuart Baker, PPM Pro Solution Architect

Lamar McMechan, PPM Pro Sr. Director Quality Management

Malika Taouil, Customer Marketing Manager (Moderator)

Housekeeping Items

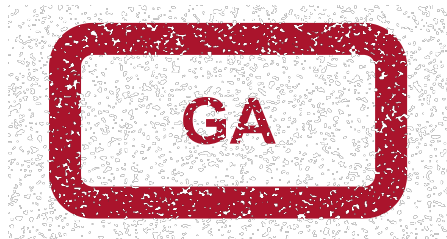
- 30-35 minutes of presentation
- Remainder Q&A
- All lines are on mute
- Enter questions into the Q&A box
 - If you can't see the chat box, click Q&A at the bottom right of the Zoom window
- Webinar is being recorded
- Recording and slides will be shared in post-webinar email, including additional info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



Current Month's Feature Status



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



Reports Revamp – Rolling Beta

Current Beta Functionality

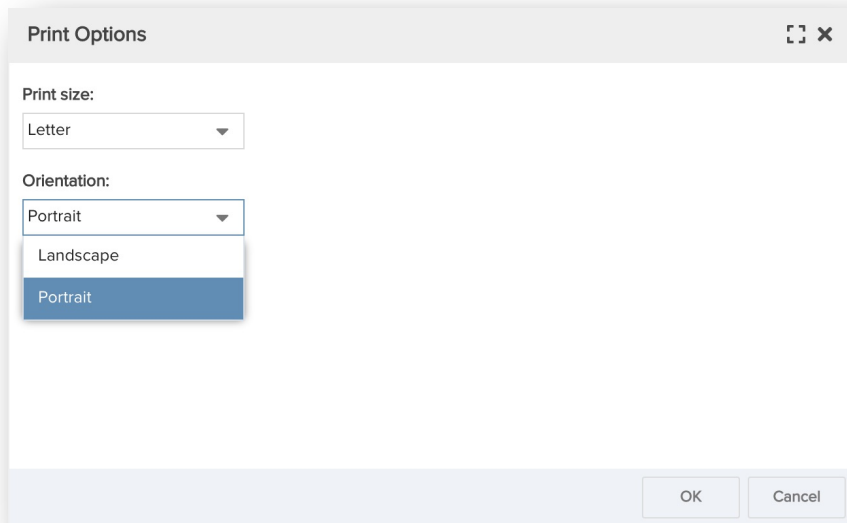
- New WYSIWYG report designer
- Runtime and view filter options
- Ability to report on indirectly-related data
- Date and number formats
- Grouping and sorting
- Initial export to PowerPoint
- Drilldowns
- Specialty reports: Scoring and Permissions
- Organization color lookup list configuration
- Field Options 'Display Data As'
- List: Basic option to wrap column titles
- 14 new report types
- List: Basic merge child rows
- 'Projects in Portfolio Hierarchy' field path
- Export to Excel
- 'Member' topic and field path
- Auto-size height in dashboard to fit content
- Print to PDF for all report types
- Tile - can now apply aggregation
- List: Stacked label colors
- View report references
- Time Series reports (initial set)

Future Releases

- Initial GA
- Post GA:
 - Capacity and demand report
 - Report topics/specialties for KPI Trend and Audit History
 - Feature: Gantt with Phases and Milestones
 - Feature: Task Timeline
 - Request gate- and approver-specific data

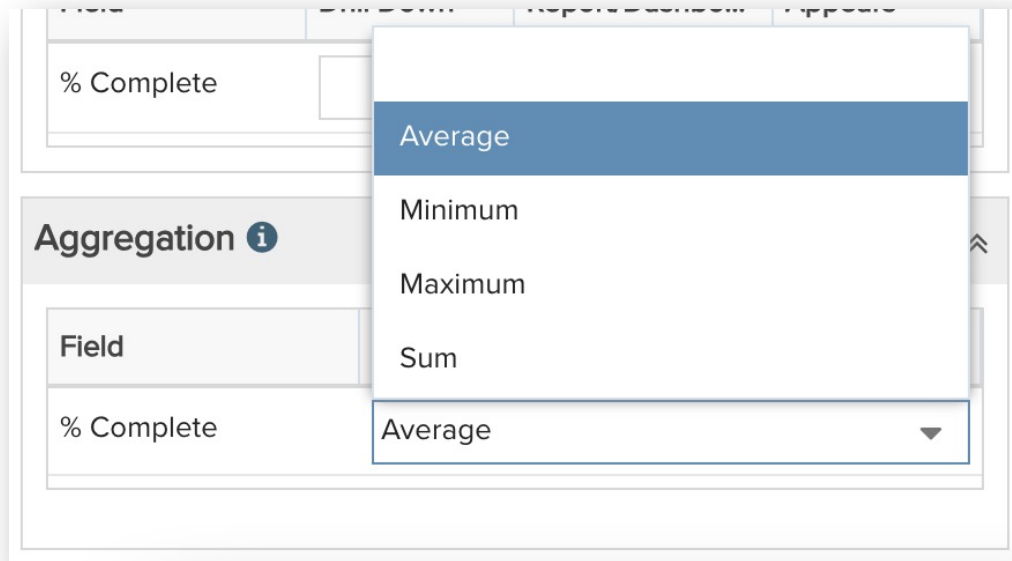
Reports – Print to PDF for All Report Types

- 'Print to PDF' all reports (for Gantt, see April webinar)
- Fit to page size – caution for wide Crosstab & List reports



Reports – Tile Aggregation Option

Sum (default), Minimum, Maximum, and Average options



Reports – List: Stacked Color Options

Planview PPM Pro MAY demo: Stacked label colors ?

Save Save & Run Cancel ↺ ↻

Design <<

General Data **Display** Variable Settings Team

Headings

Stacks

Number of Stacks:
2

| Stacks | Width | Pixels |
|----------|-----------|--------|
| 1: Title | Fixed | 100 |
| 1: Value | Automatic | |
| 2: Title | Fixed | 96 |
| 2: Value | Automatic | |

Label text color:
#ffffff

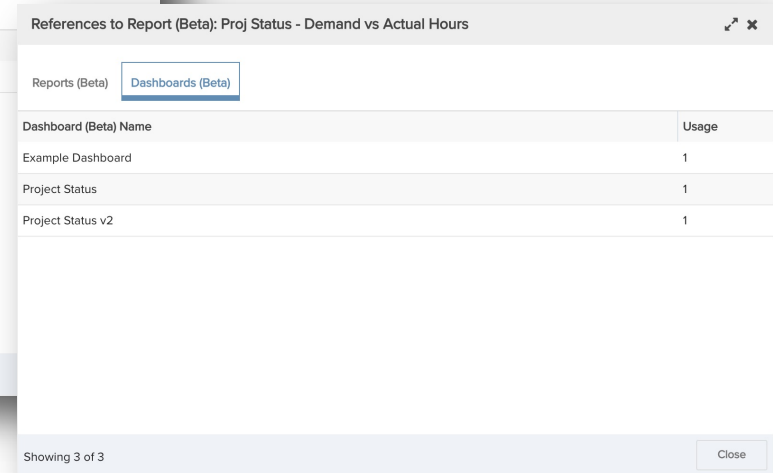
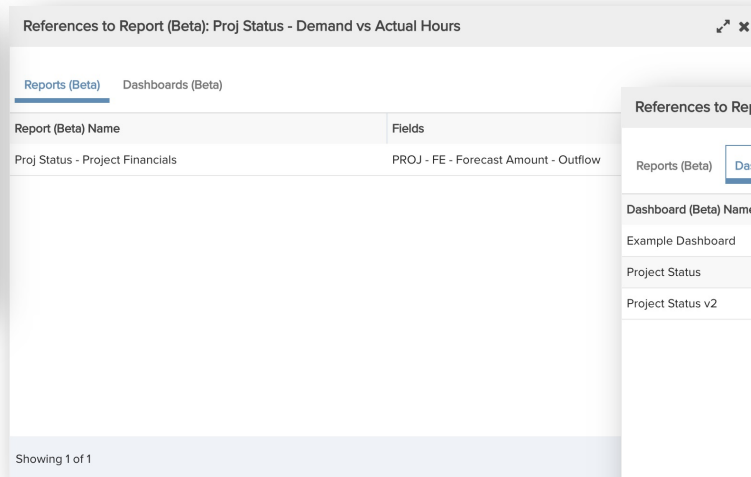
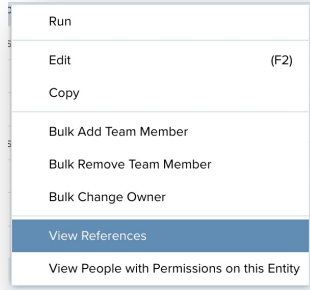
Label background color:
#1910d4

Preview ⓘ

| Title | Priority | Start Date | Owner | Status | Target Date |
|---------------|-----------|------------|-----------------|--------------------|-------------|
| Project 10000 | | 2/21/2021 | Lindhoff, Euon | Active | 7/13/2021 |
| Project 10001 | 2: Medium | | Kirk, Chritine | Completed | |
| Project 10002 | 1: High | 5/7/2021 | DeMaria, Bob | Inactive | 10/20/2021 |
| Project 10003 | 3: Low | | Hill, Stephen | Approved - Backlog | 5/16/2021 |
| Project 10004 | | 2/17/2021 | Cabrero, Filipe | Canceled | 10/7/2021 |

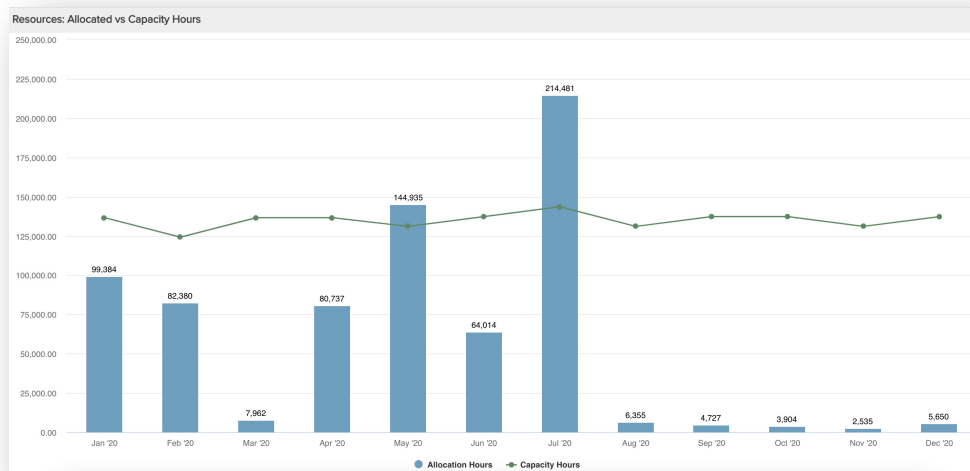
Reports – View References

For a report, what reports are drilling down to it and what dashboards use it



Reports – Time Series Specialty

- New Specialty “Time Series” – planning/contoured data
- More drilldowns and Role topic Time Series still to come



| Resource Planning by Allocated Role | | | | | | | | | | | |
|---|-----------------|------------------|-------------|--------------|-----------------|-----------------|-------------|--------------|-------------|--------------|------------|
| Project | Role | Resource | Jan '20 | | | | | | Demand Cost | Demand Hours | Allocation |
| | | | Demand Cost | Demand Hours | Allocation Cost | Allocated Ho... | Actual Cost | Actual Hours | | | |
| Agile - Standard Jira Integration Project | | | \$32,322 | 474 | \$32,322 | 474 | \$0 | 0 | \$28,496 | 407 | |
| | Architect | Gerise, Snigdha | \$0 | 0 | \$0 | 0 | \$0 | 0 | \$2,880 | 36 | |
| | | Business Analyst | \$0 | 0 | \$0 | 0 | \$0 | 0 | \$0 | 0 | |
| | | Shaughn, Jorge | \$0 | 0 | \$0 | 0 | \$0 | 0 | \$0 | 0 | |
| | Design Engineer | | \$3,606 | 70 | \$3,606 | 70 | \$0 | 0 | \$1,136 | 21 | |
| | | Gage, Greg | \$386 | 6 | \$386 | 6 | \$0 | 0 | \$336 | 5 | |
| | | Ressor, Rob | \$3,220 | 64 | \$3,220 | 64 | \$0 | 0 | \$800 | 16 | |
| | Developer | | \$17,446 | 266 | \$17,446 | 266 | \$0 | 0 | \$14,680 | 230 | |
| | | Ebert, Colin | \$9,000 | 150 | \$9,000 | 150 | \$0 | 0 | \$9,000 | 150 | |
| | | Lindhoff, Euon | \$3,588 | 55 | \$3,588 | 55 | \$0 | 0 | \$3,120 | 48 | |
| Agile Methodology Learning Plan | | McMechan, L... | \$4,858 | 61 | \$4,858 | 61 | \$0 | 0 | \$2,560 | 32 | |
| | Engineer | | \$8,280 | 92 | \$8,280 | 92 | \$0 | 0 | \$7,200 | 80 | |
| | | Durbin, Jeff | \$8,280 | 92 | \$8,280 | 92 | \$0 | 0 | \$7,200 | 80 | |
| | Project Manager | | \$2,990 | 46 | \$2,990 | 46 | \$0 | 0 | \$2,600 | 40 | |
| | | Garcia, Maritza | \$2,990 | 46 | \$2,990 | 46 | \$0 | 0 | \$2,600 | 40 | |
| | | | \$0 | 0 | \$0 | 0 | \$0 | 0 | \$0 | 0 | |
| | Architect | | \$0 | 0 | \$0 | 0 | \$0 | 0 | \$0 | 0 | |

See [reports cookbook](#) for recipes for these two reports

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
- Home and project Overview section dashboards
- Change report component headings
- Dashboard publishing with Published URL Display Text
- Access to previously published dashboards
- Edit Content Options/View Content List
- View References & additional columns
- Export to Excel
- Ability to publish hourly
- Print to PDF

Future Releases

- Initial GA
- Post GA: Rich text/image content, for example, company logo and instructions with links

Dashboards – Hourly Publish Option

- Publish every 1 to 24 hours between two starting/ending times
- Caution for very large dashboards – if publishing not completed by next hourly time slot, will not be published

The screenshot shows a window titled "Manage Publishing: Horizons Demo". It contains a warning message about permissions, a "Publish" section with radio buttons for "Once" and "On a schedule" (selected), and two expandable sections: "Publish Options" and "Publishing Schedule".

Publish Options:

- User authentication required to view dashboard
- ☒ Do not require any authentication
- ☐ Require user to be logged in to PPM Pro
- ☐ Require user to enter an access code ⓘ

Publishing Schedule:

Publish

☒ Hourly ☐ Daily ☐ Weekly ☐ Monthly

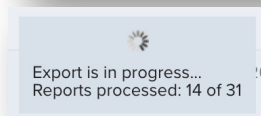
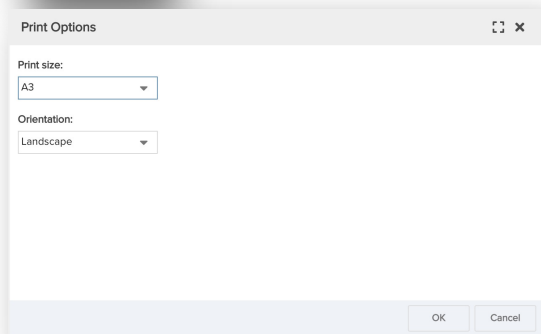
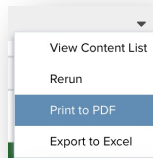
Every hours ⓘ

Starting after ⓘ Ending before ⓘ

Buttons at the bottom: Publish, Unpublish, Cancel

Dashboards – Print to PDF

All data printed, including outside scroll region for lists

A screenshot of a PDF viewer window. The title bar shows the file path "7f1e15c8-011d-480c-bed9-5876431bfde.pdf" and page information "1 / 36", "83%", and zoom controls. The main content area displays a report titled "Report 1" (Page 1 of 35). The report contains a table with columns: Project, Outline Number, Title, Estimated Hours, Target Date, Priority, and Status. The table lists various projects and their tasks, with status indicators in green boxes. A sidebar on the left shows four thumbnails of the report pages, numbered 1 through 4.

| Project | Outline Number | Title | Estimated Hours | Target Date | Priority | Status |
|---------------------------|----------------|--------------------------------------|-----------------|-------------|----------|--------|
| #Haworth Project Template | 1 | Ideation | 0.00 | 8/1/2018 | | Open |
| | 2 | Concept | 0.00 | 11/1/2018 | | Open |
| | 3 | Design | 0.00 | 2/1/2019 | | Open |
| | 4 | Development | 0.00 | 6/1/2019 | | Open |
| | 5 | Production Readiness | 0.00 | 12/1/2019 | | Open |
| #Hyperloop One | 1 | Financial Estimate for 2018 | 0.00 | 6/26/2018 | | Open |
| 1Salesforce | 2 | New Task for McDermott | 0.00 | 12/11/2018 | 4: Low | Open |
| ADP Comp | 1 | First ADP TLM pay period END date | 0.00 | 9/18/2017 | | Open |
| | 1 | Configuration | 0.00 | 10/5/2017 | | Open |
| | 1 | Start-Up | 0.00 | 9/16/2017 | | Open |
| | 2 | Analysis | 0.00 | 9/30/2017 | | Open |
| | 2 | Data Extraction & Conversion | 0.00 | 11/21/2017 | | Open |
| | 2 | First ADP Pay Date | 0.00 | 10/23/2017 | | Open |
| | 3 | Benefits Live | 0.00 | 10/24/2017 | | Open |
| | 3 | Validation | 0.00 | 11/22/2017 | | Open |
| | 3 | Configuration | 0.00 | 11/22/2017 | | Open |
| | 4 | Comprehensive Benefits Live | 0.00 | 10/27/2017 | | Open |
| | 4 | Production | 0.00 | 11/30/2017 | | Open |
| | 5 | ADP 40% Plan Effective Date | 0.00 | 10/27/2017 | | Open |
| | 5 | Important Milestones | 0.00 | 11/14/2017 | | Open |
| | 6 | First Comprehensive Payroll Pay Date | 0.00 | 10/30/2017 | | Open |
| | 7 | Time Off Request/PTO Live | 0.00 | 10/31/2017 | | Open |

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

Managed Staffing "Save & Staff" Enhancement

When using the Managed Staffing, if *edit* an allocation, users with staffing permissions for resource can staff directly:

The screenshot shows a software interface for Managed Staffing. At the top, there's a header bar with a 'DBA' label and a user icon. Below this is a table with two rows. The first row is for 'Archilla, Yessica' with a status of 'New', a date of '12/15/2017', a role of 'DBA', and an internal rate of 'Internal Rate-Tier...'. The second row is for 'Thomas, Jeff' with a status of 'Staffed', a role of 'Role Rate', and a rate of 'Various'. A red box highlights the 'Save & Staff' button, which is located between the two rows. Other buttons visible are 'Save' and 'Cancel'.

| Name | Status | Date | Role | Rate |
|-------------------|---------|------------|-----------|-----------------------|
| Archilla, Yessica | New | 12/15/2017 | DBA | Internal Rate-Tier... |
| Thomas, Jeff | Staffed | | Role Rate | Various |

This is the second part of the April enhancement for "Save & Staff" when using the Add icon.

Financial Entries Numeric Field Totals Enhancement

Sums for all left-hand side numeric fields (*except %*) will display in Total line of Financial Entries:

| | | | | | | | | | |
|--------------------------|---------------------|------------|------------|-----------------|---------------|---------------|--------------------|-------------------|-----------|
| Summary <u>Entries</u> | | | | | | | | | |
| Filter Financial Entries | | | | | | | | | |
| | | | | | | | | | |
| Info | Title | Forec... | Actu... | MAY Integer UDF | MAY Money UDF | MAY Float UDF | MAY Act Calc Fi... | MAY Fore Calc ... | MAY % UDF |
| | Total | \$500.00 | (\$300.00) | 4,000 | \$20.00 | 500.00 | (\$450.00) | \$250.00 | |
| ✕ | ▼ Expense 1 - Op | \$200.00 | \$300.00 | | | 300.00 | \$450.00 | \$100.00 | 20.00% |
| ✕ | Actuals Exp 1 - Op | | \$300.00 | 4,000 | \$20.00 | | \$450.00 | | |
| | ▼ Expense 2 - Cap | \$600.00 | \$900.00 | | | 200.00 | \$1,350.00 | \$300.00 | 50.00% |
| | Actuals Exp 2 - Cap | | \$900.00 | | | | \$1,350.00 | | |
| | ▼ Forecast Revenue | \$1,300.00 | \$900.00 | | | | \$1,350.00 | \$650.00 | |
| | Actuals Revenue | | \$900.00 | | | | \$1,350.00 | | |
| | | | | | | | | | |

Coming Soon!

- R2D2 GA – **target June**
- LeanKit-PPM Pro 2 GA – **target June**
- New Reports enablement **June 28th**
 - 8 am CDT / 15:00 CEST / 6:30 pm IST
 - 5 pm CDT / 3 pm PDT / 8 am AEST June 29th
- New Dashboards enablement **June 30th**
 - 8 am CDT / 15:00 CEST / 6:30 pm IST
 - 5 pm CDT / 3 pm PDT / 8 am AEST July 1st



Upcoming Webinars/Events

- Q2 Roadmap webinar **May 26th**
- June release webinar **June 16th**
- R2D2 enablement **June 28th/30th** (ICYMI 😊)

PRODUCT RELEASES

Planview PPM Pro Customer Webinars

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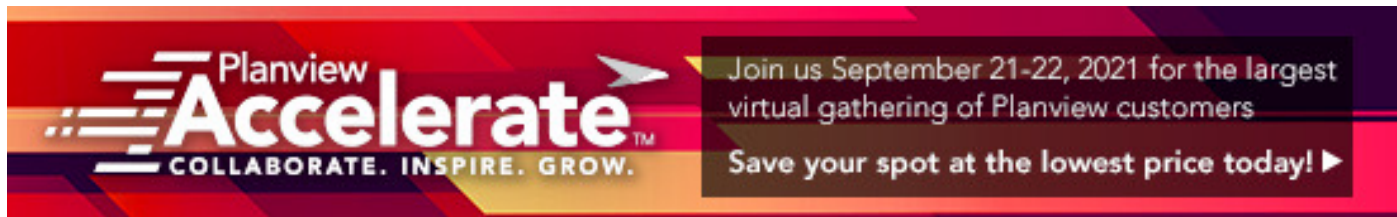
2021

| Monthly Release Webinars | Other Webinars of Interest |
|---|--|
| 1/13/2021: January Release Q&A Transcript View PDF View Presentation | 1/14/2021: How to Go from Doing Agile to Being Agile with Planview View Presentation Presentation Slides |
| 2/17/2021: February Release Q&A Transcript View PDF View Presentation | 2/24/2021: Q1 Roadmap Webinar View PDF View Presentation |
| 3/17/2021: March Release Q&A Transcript View PDF View Presentation | 4/22/2021 (two sessions): 5 Ways to Accelerate On-Strategy Delivery in Times of Change - Insights from the State of Strategy Execution Global Benchmark Report View Presentation |
| 4/14/2021: April Release Q&A Transcript View PDF View Presentation | 5/26/2021: Q2 Roadmap Webinar Register |
| 5/19/2021: May Release Register | 6/28/2021: New Reports Enablement Webinar - 1.5 hour overview and demo session, two times offered: <ul style="list-style-type: none">• 8 am CDT / 15:00 CEST / 6:30 pm IST Register• 5 pm CDT / 3 pm PDT / 8 am AEST June 29th Register |
| 6/16/2021: June Release Register | 6/30/2021: New Dashboards Enablement Webinar - 1.5 hour overview and demo session, two times offered: <ul style="list-style-type: none">• 8 am CDT / 15:00 CEST / 6:30 pm IST Register• 5 pm CDT / 3 pm PDT / 8 am AEST July 1st Register |
| 7/14/2021: July Release Register | 8/25/2021: Q3 Roadmap Webinar 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 | |

Virtual Planview *Accelerate* Customer Conference 2021

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

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



Q&A

Sherrill spackebush@planview.com

Jennifer jrose@planview.com



Thank You