



# PPM Pro Customer Enablement Webinar: Dashboards 2.0

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

# Housekeeping Items

- 1.5 hours of presentation 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



# Agenda

- Understanding Dashboards Then vs Now
- Review of Dashboards Permissions
- Working with the Dashboards List
- Creating New Dashboards
- New Publishing Features]
- Setting up Home/Project Overview

# What's the Difference??

Then	Now
All users could see the Dashboards-Top Tab	Users need access to at least one Dashboard
Dashboards had to be configured for each "Target"	Now you can create one Dashboard to be visible in multiple Dashboard List locations and change the scope when viewing
The Dashboard had to be run to see the components	Now we have a WYSIWYG designer that gives you a preview of the reports that have been added.
Changing filters was available but only Saved filters could be used	Now we can use Ad Hoc filters on the dashboard's reports while viewing the data
Publish dashboards was not Possible during working hours and only available once per day	Now Dashboards can be published at any point and multiple times per day
You needed access to the Admin Group "Publishing" to publish dashboards	Now Publishing is configurable through Permissions
We did not have the ability to see past published dashboards	Now Dashboards 2.0 allows you to view previously published dashboards
Published dashboard notification via max of 15 emails, with publication expiration date (1 year max)	Now published notifications via resource filters and/or max of~100 emails, expiration based on number of publications
View and publish as Owner	View as user, publish as publisher

# Dashboard Permissions

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# Dashboards Permissions

- Team
  - From the Permissions Hierarchy create or add Team level access on the Dashboards Entity
- Global
  - Configure your Users, Groups, and Units that need the ability to View, Create, Edit, Publish, Delete Dashboards
- Owner
  - Make sure that the owner permissions have been properly updated
- Remember
  - Publishing Permissions can be configured here

# Dashboard Permissions

Sections

▶ Organization

▶ **Permission Profiles**

Users

Groups

▶ Setup

Publishing (Legacy)

Publishing

Scheduled Jobs

Data Import

Web Services API

Permission Profiles

Filter Permission Profiles

Profile Title ↑

Description

0) Student Profile	Profile to be used when setting up students for r...
1) Basic View	Profile to be used when adding a user to entity t...
2) Full View	Profile to be used when adding a user to entity t...
3) Basic Edit	Profile to be used when adding a user to entity t...
4) Full Edit	Profile to be used when adding a user to entity t...
Admin for Finances an...	Gives Admin group access for Finances and Inter...
All Permissions	Ability to view/add/edit/delete all entities
Create Assets	Gives selected Groups the ability to create Assets.
Create Portfolios	Gives selected Groups the ability to create Portfo...
Create Projects	Gives selected Groups the ability to create Proje...
Create Reports/Dashb...	Allows listed users to create reports, dashboards...
DAN BROWN	
Owner Permissions	Allows the owner of an entity to have full view/ed...

Save

Cancel

Title:\*

New Dashboard Permissions

Description:

This is for the enablement webinar.

Permission Rules

Add

Remove

Acti...	Rule Type	Scope
<input checked="" type="checkbox"/>	Team	Dashboard: This profile can be selected as a team profile when adding a User, Group, or Unit to the team of a specific Dashboard.
<input checked="" type="checkbox"/>	Global	User 'Banner, Rene' has the

Permission Hierarchy

▶ ☐ All Permissions

▶ ☐ All Asset Classes

▶ ☒ **Dashboard**

▶ ☒ View

▶ ☒ Create

▶ ☒ Edit

▶ ☒ Delete

▶ ☐ Dashboard (Legacy)

▶ ☐ Filter

▶ ☐ Organization Currencies

▶ ☐ Organization Finance Settings

▶ ☐ Organization Internal Rates

▶ ☐ All Portfolio Classes

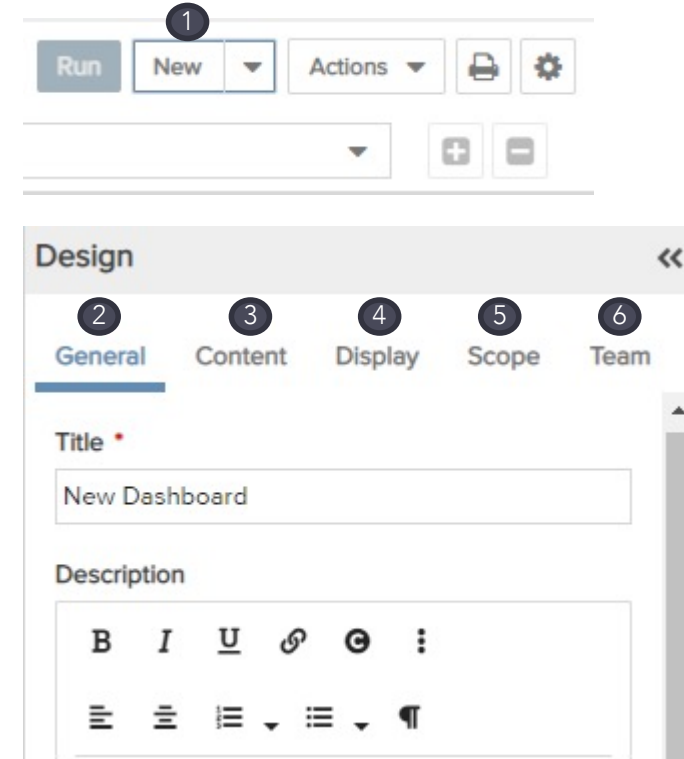
# Creating a Dashboard

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# Dashboard Creation

- 1 Click the New button
- 2 Fill out the General Tab
  - Title, Description, Owner
- 3 On the Content Tab add the Reports to your Preview
  - On Each Report you can Edit Headings, Variable Settings, or Remove the Report
- 4 On the Display Tab
  - Fill out Container Title
  - Choose to add (Run as / Published as and Date) Info if needed
- 5 On the Scope Tab
  - Allow changing scope
  - Select Dashboard grids that need access
  - Allow access to Home Overview / Project Overview
- 6 On the Team Tab
  - Add any Users, Groups, or Units to the Team of the Dashboard



# Publishing a Dashboard

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# Publishing a Dashboard

- 1 First, choose if you are publishing once or on a schedule
- 2 Next configure Publishing Options
  - Select what authentication required to view a dashboard
- 3 Configure the Publishing Schedule
- 4 Set up your Internal Notification

Manage Publishing: Enablement Dashboard

Users who view published dashboards see data based on the permissions of the dashboard publisher, and may see data they may not normally have permission to see. Please take this into consideration when publishing a dashboard.

Publish

☒ Once

1

☐ On a schedule

Publish Options

2

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 i

Publishing Schedule

3

Publish

☐ Hourly

☒ Daily

☐ Weekly

☐ Monthly

Every  days

After i

Notify internal recipients for each publication:

Notify Resources where

4

any of the following are true (v)

(v)

# Publishing a Dashboard

- 5 Set up your email for external Dashboard recipients
- 6 You can also choose how the URL text will display
- 7 Finally Set up the Publishing Schedule Expiration

Email subject and message 5

[dashboard title] published {x}

{x}

B I U % © !

Click the link below to view the dashboard. Please do not reply to the email. "{dashboard title}" was published by {published by}. If you have questions regarding this dashboard or if you would like to stop receiving these emails, please contact dashboard publisher {published by} ({published by email}).

A link to the published dashboard will appear below the email message

Published URL Display Text 6

Publishing Schedule Expiration 7

Publishing schedule expires after 500 publications

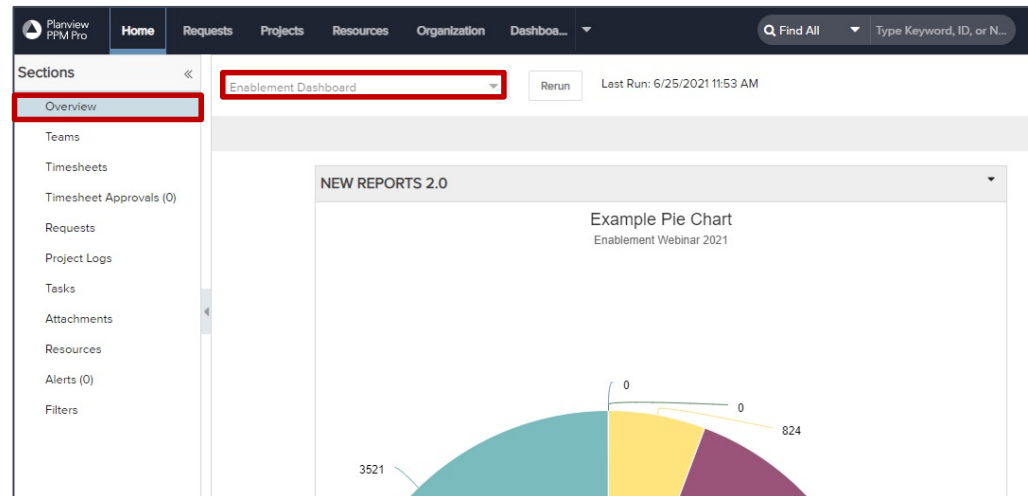
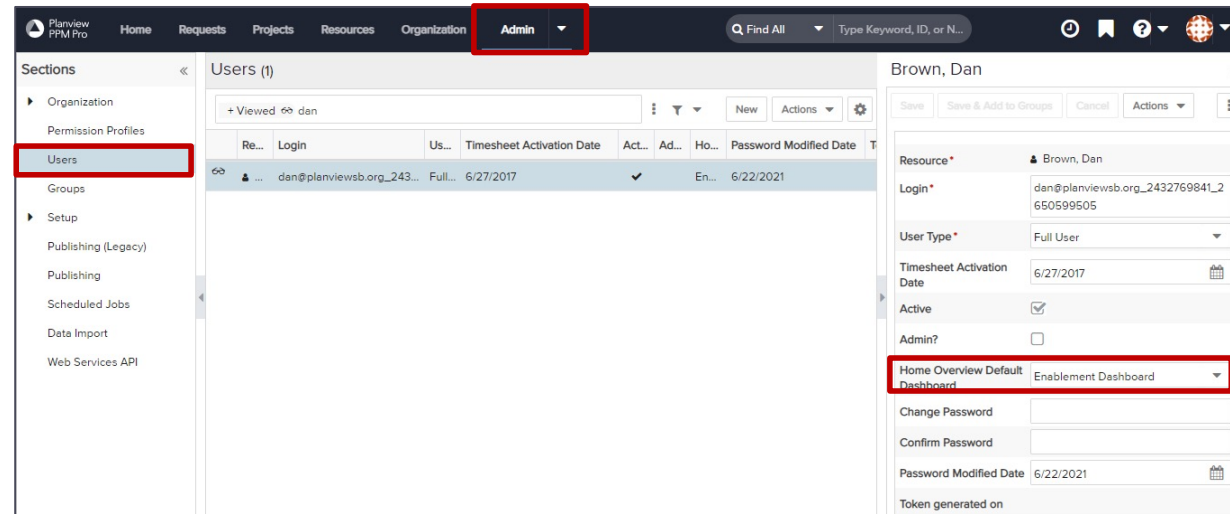
☐ Notify dashboard publisher 7 publications before expiration

# Home and Project Overview Dashboard

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# Setting Up Home Overview

- 1 Select the Users Section of Admin
- 2 Edit individual users or use bulk edit to select the Home Overview Dashboard
- 3 Once saved the Dashboard will be visible on the Home menu on the Overview Section



# Setting Up Project Overview

- 1 On the Admin Menu. Open All Entities, Select Projects, Select Categories
- 2 Edit the Project Category you wish to apply the Project Overview Dashboard, Enable the Overview Section, and Select the Dashboard
- 3 Once applied the Project Overview Section will be available on each project category for permitted users

The screenshot shows the Planview PPM Pro Admin interface. On the left, the 'Sections' menu is open, and 'Categories' is highlighted under 'All Entities'. The main area displays 'Project Categories (1)' with a table showing one category: 'Stan... Defa... Exa...'. An 'Edit Category' modal is open, showing the 'Health profile' as 'Example Health'. Under 'Sections to include', 'Overview' is checked and highlighted. The 'Overview default dashboard' is set to 'Enablement Dashboard'.

Active	Title	Des...	Heal...	Ove...	Add...	Fin...	Sta...	Tasks	Proj...	Port...
✓	Stan...	Defa...	Exa...		✓	✓	✓	✓	✓	✓

**Edit Category**

Health profile: Example Health

'Additional details' display name:

**Sections to include**

- ☒ Overview
- ☒ Additional Details
- ☒ Financial Entries
- ☒ Staffing
- ☒ Tasks
- ☒ Project Logs
- ☒ Project-Predecessors

Overview default dashboard: Enablement Dashboard

The screenshot shows the Planview PPM Pro Projects interface for a project named '#Large System Project'. The 'Overview' section is highlighted in the left sidebar. The main area displays the 'Enablement Dashboard' with a 'Run' button and 'Last Run: 6/25/2021 12:07 PM'. Below the dashboard, there is a table with project details.

Title	Owner	Status	RYG Overall	Demand ...	Project C...
#Large System Project	PPM, Support	Open	Green	0.00	\$0.00

Color by: None

Title	Owner	Status	Year	Year
#Large	PPM, Support	Open	12/2013	2019

# Questions after webinar? Please contact

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