



PPM Pro Customer Enablement Webinar: Reports 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 Reports Then vs Now
- Review of Reports Permissions
- Working with the Reports List
- Creating New Reports

New Reporting Terms

Word	Definition
Topic	Every report is based on a single 'Topic' that is the primary focus of the report data and must be selected. Each Topic corresponds to a reportable entity or key feature in PPM Pro, such as portfolios, projects, timesheets, and so on.
Type	This is used to define the specific output style of your Report
Specialty	These are fields that provide internal scaffolding to support broader-themed reports, such as Scoring, Permissions, and Time Series
Scope	The report "scope" determines the context in which to run the report - across one entity/data set or across multiple entities/data sets. The Scope will also share the report with other report list pages.
Team	These are the Users, Groups, Units that have direct access to your report.

What's the Difference??

Then	Now
All users could see the Reports-Top Tab	Users need access to at least one report
You could have multiple outputs in a report, but only 6	Now only one output is available per report, but there are up to 21 types and growing
To see the report it had to be run in a separate window	Now we have a WYSIWYG Editor with Sample data
There was no ability to easily search for reporting fields	Now you can search for your fields by using full or partial titles
There were options based on Output Type, but these do not include font, font style, and font size.	The report designer includes additional display options based on the report Type, allowing you to control the report appearance for headings, sub-headings, data, and other elements. These options include font, font style, font size, and location.
There was no way to change the target or filters when viewing the report	Now you can change the Scope and have ad hoc filters when viewing the report
The reports list was only able to be filtered and sorted by columns	Now we have included a "Group by" option to the list page

Reporting Permissions

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Reports Permissions

- Team
 - From the Permissions Hierarchy create or add Teal level access on the Reports Entity
- Global
 - Configure your Users, Groups, and Units that need the ability to View, Create, Edit, Delete Reports
- Owner
 - Make sure that the owner permissions have been properly updated

Reports Permissions

Planview PPM Pro

Home

Reports

Dashboards

Organization

Dashboards (Legacy)

Resources

Applications

Portfolios

Projects

Admin

Find AllType Keyword, ID, or Name

Sections

Organization

Permission Profiles

Users

Groups

Setup

Publishing (Legacy)

Publishing

Scheduled Jobs

Date 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 and Internal ...

Gives Admin group access for Finances and Inte...

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 Portf...

Create Projects

Gives selected Groups the ability to create Proje...

Create Reports/Dashboards/Filters

Allows listed users to create reports, dashboards...

Owner Permissions

Allows the owner of an entity to have full view/e...

Resource Availability - View

Profile to be used as a special access rule in the ...

View Projects

All members of Finance Unit have permission to ...

Save

Cancel

Title *

New Reports Permissions

Description:

This is for the enablement webinar

Permission Rules

AddRemove

Active

Rule Type

Scope

☒

Team

Report: This profile can be selected as a team profile when adding a User, Group, or Unit to the team of a specific Report.

☒

Global

User 'Two, Student' has the selected permissions on all instances of the entity.

☒

Owner

Entity owners are implicitly granted View and Edit permission on the Details section of the entity, plus any other permissions configured in this profile.

Permission Hierarchy

All Permissions

☐ All Asset Classes

☐ Dashboard

☐ Dashboard (Legacy)

☐ Filter

☐ Organization Currencies

☐ Organization Finance Settings

☐ Organization Internal Rates

☐ All Portfolio Classes

☐ All Project Categories

☒ Report

☒ View

☒ Details

☒ Team

☒ Create

☒ Edit

☒ Details

☒ Team

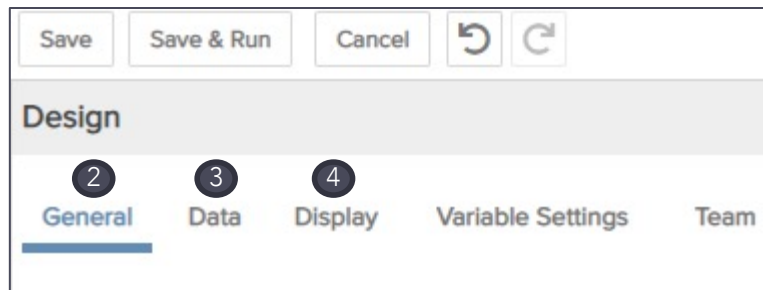
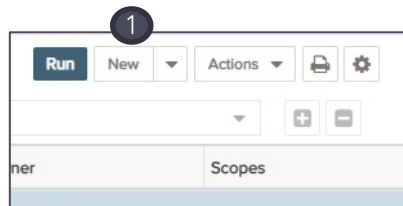
☒ Delete

Creating a Report

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Report Creation

- 1 Click the “New” button
- 2 Fill out all the info on the General Tab
 - Topic, Type, Title, Description
- 3 On the Data Tab
 - Add in the fields required to complete your report
 - You can also drill into your selected Topic’s Related and Children data by following the field path
 - Make any cosmetic changes needed
 - Note: The Preview is comprised of sample data
- 4 On the Display Tab
 - Configure all the sections that you need to modify your report
 - Headings, Data Visibility, Legends, Etc.



Report Creation

5 On Variable Settings

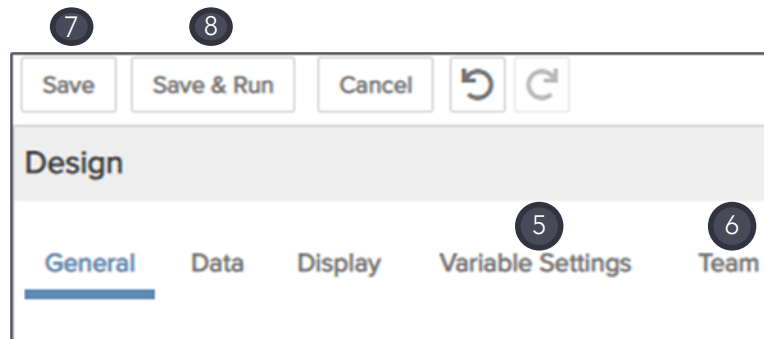
- Decide If Scope can be changed "Before Running" and/or "When Viewing")
- Select access of the report to all report grids
- Decide If Filters can be changed "Before Running" and/or "When Viewing")
- Apply any Default Filters

6 On the Team Tab

- Add any Users, Groups, or Units to the Team of the Report

7 Click Save to save any changes

8 Click Save and Run to save changes and view your report



Viewing your Report

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NEW REPORTS 2.0

Title of Report

Variable Settings

Scope:

Organization

Change the Scope if needed

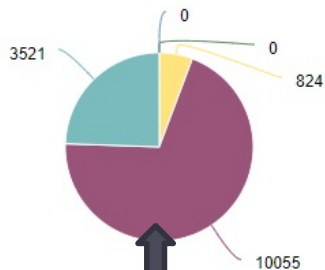
Projects:

Filter Projects

Use Prebuilt Filters
or create your own

Example Pie Chart
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Report Heading and
Subheading



View the data of your Report

● Canceled
● Completed
● Hold
● Open
● Proposed

Report Legend

Export PNG

Export JPG

Print to PDF

Export SVG vector image

Export to PowerPoint

Export to Excel

Export CSV

Export TSV

List of actions on the Report View



Questions after webinar? Please contact

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PPM Pro Working Sessions customer inner circle -

[https://info.planview.com/Tactics-to-Respond-Quickly- user-
group_prm_en_reg.html](https://info.planview.com/Tactics-to-Respond-Quickly-user-group_prm_en_reg.html)