



# PPM Pro Customer Webinar: August 2021 Release

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



# PPM Pro Customer Webinar: August 2021 Release

PPM Pro Product Posse: Jennifer Rose, Sherrill Packebush, Stuart Baker, Lamar McMechan  
Moderator: Malika Taouil, Customer Marketing Manager

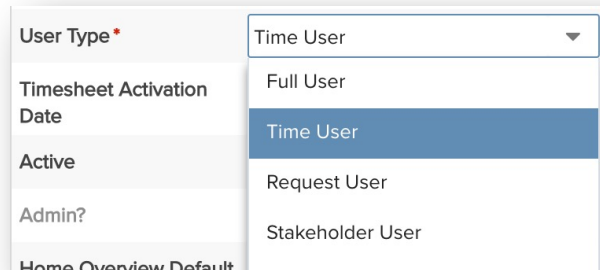
# Housekeeping Items

- 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



# Time User (User Type) Option

- Ability to ***permit viewing*** of SSA entities and data, such as projects and unassigned tasks and project logs
- Ability to ***drill down*** from permitted reports & dashboards
- Ability to ***permit creation*** of reports
- **Optional capability: please review your permission profile rules and Group memberships before asking Customer Care to turn on!**

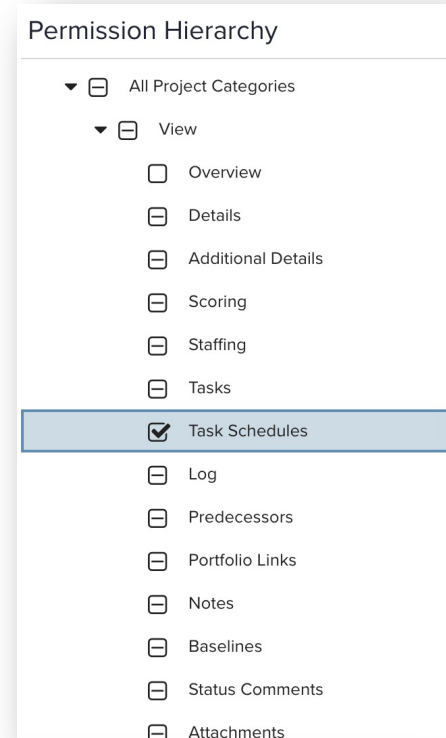


A screenshot of a web application interface showing a dropdown menu for 'User Type'. The dropdown is open, displaying four options: 'Full User', 'Time User' (which is highlighted with a blue background), 'Request User', and 'Stakeholder User'. The 'User Type' label has a red asterisk next to it. Below the dropdown, there are labels for 'Timesheet Activation Date', 'Active', 'Admin?', and 'Home Overview Default'.

User Type*	Time User
Timesheet Activation Date	Full User
Active	Time User
Admin?	Request User
Home Overview Default	Stakeholder User

# Project/View/Task Schedules Permission

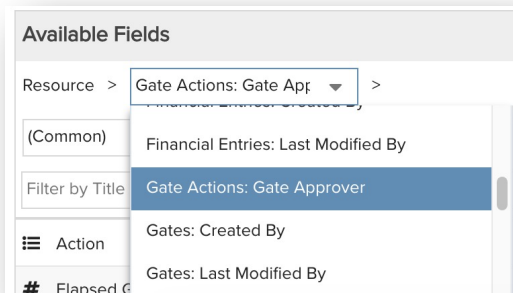
- Can now hide/show Project Task Schedules tab via Project Permissions
- To allow editing Task Schedules, ensure both View Tasks and View Task Schedules are selected



# Request Gate and Approver Report Metrics

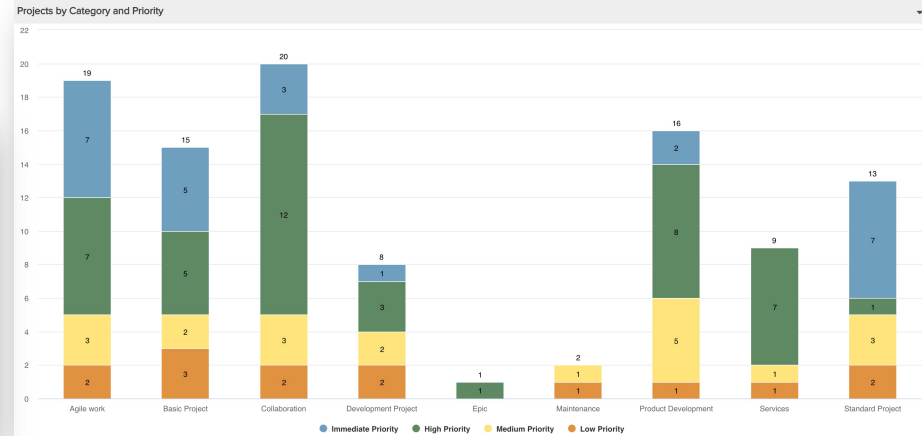
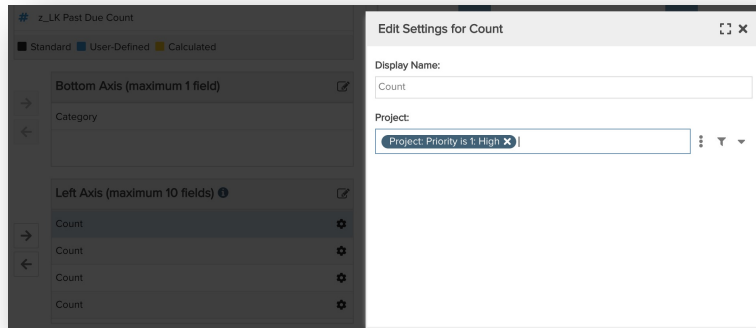
Request and Resource report field paths to show:

- when a request was submitted/entered each gate
- when a request was approved to move to the next gate
- how long each request stayed in each gate
- requests days to closure and days to conversion/approval
- the requests that I was an approver for
- how much time does a specific approver generally take to deal with a request at a gate
- approved requests, including approver(s) and date/time of gate action



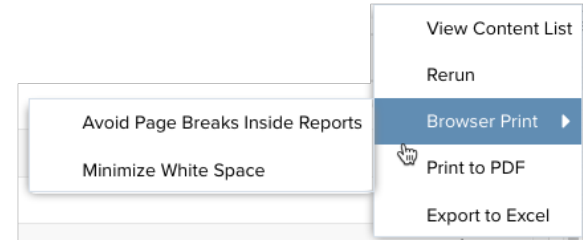
# Report Field-Level Filters

- Add a field more than once to data, with different filters per field instance
- Enables same reporting capabilities as many Legacy report calculated fields



# Dashboard Browser Print for PDFs

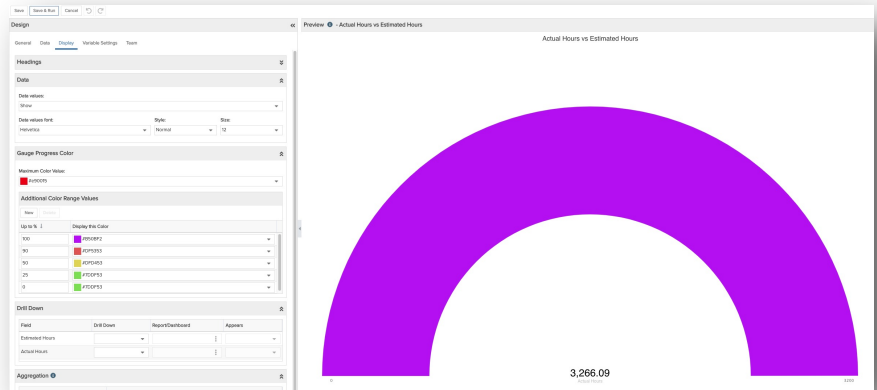
- Avoid Page Break Inside Reports – Prints as many reports as possible on one page, reports that don't fit on one page will start on a new page
- Minimize White Space – Prints as many reports as possible on one page
- Can resize window, columns and such before printing
- Select to print background graphics for Gantts





# Gauge Report

- For % data, just need Progress
- For other numeric data, use Progress *and* Measurement
- Use Field Options for Progress 'Display As' format
- Use Min/Max Boundaries 'Label Format' for Measurement format
- Consider Aggregation



# Pie & Donut Report Label Options

Data values:

Label and Percentage (0%)

Do not show

Label

Label and Percentage (0%)

Label and Percentage (0.00%)

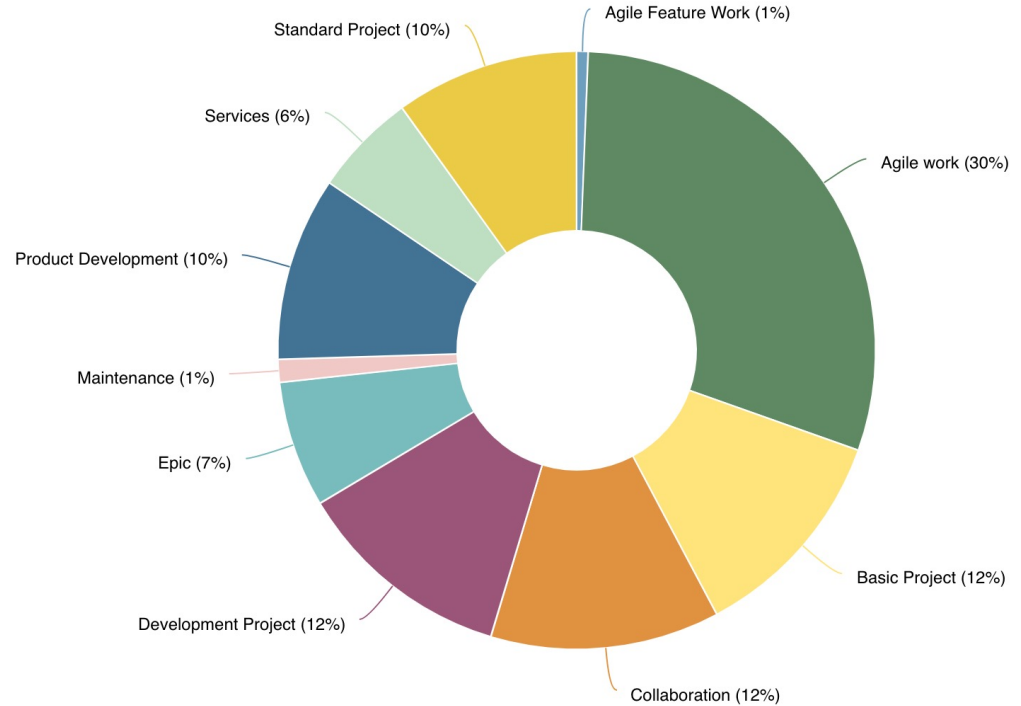
Label and Value (0)

Label and Value (0,000)

Label and Value (0,000.00)

Percentage 0%

Percentage 0.00%



# Report Health & Calculated Field Colors

- Gantt Color By and Display As options now honor:
  - Standard health field colors
  - Calculated field colors

Title	Cost Estimated H...	Hours Estimated ...	Project Late with ...
Project 100...		Yellow	
Project 10001	Yellow	Green	Diam vulputate ut...
Project 100...	Yellow		S duis at consect...
Project 10003		Green	Que habitant mor...
Project 10004	Red		Ur adipiscing elit,
Project 100...			

Calculated Field: Project Late with Color

Basic Details

Formula Editor

Select Fields

Fields

Color by: Project Late with Color

None

Title

Cost Estimated Health Color

Hours Estimated Health Color

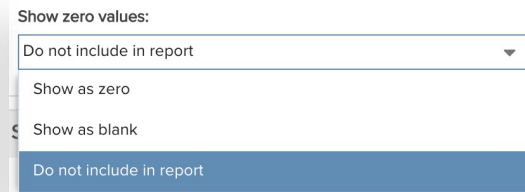
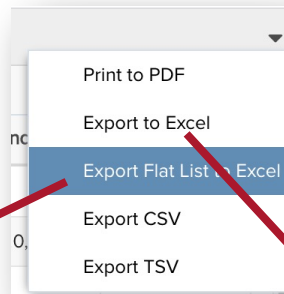
Project Late with Color

Formula:

If([Project].[Target Date]<Today()) and ([Project].[Status]="Open"), "Red", "Green")

# Crosstab Report Zero Values and Export Options

- Export Flat List to Excel
- Hide entire zero value rows



A	B	C	D	E	F	G
Title	Title	Project Quarter	Budget Cost (Cal)	Budget Cost (Non-Grand Cost)	Budget Cost (Grand Cost)	Budget Cost (Non-Grand Cost)
#PM Methodology	#PM Methodology	03/31/2020	\$100,000.00	\$50,000.00	\$15,000.00	\$71,300.00
#Project Cost Template	#Project Cost Template	09/30/2019	\$200,000.00	\$100,000.00	\$170,400.00	\$220,000.00
#SDLC Template	#SDLC Template	12/31/2019	\$50,000.00	\$30,000.00	\$50,000.00	\$0.00
1. Salesforce to AX Order Creation	1. Salesforce to AX Order Creation	09/30/2020	\$50,000.00	\$30,000.00	\$100,000.00	\$67,000.00
Agile - Standard Jira Integration Project	Agile - Standard Jira Integration Project	03/31/2020	\$5,000.00	\$1,002,500.00	\$54,933.33	\$126,500.00
AI Interface Rollout	AI Interface Rollout	12/31/2020	\$100,000.00	\$2,500,000.00	\$70,600.00	\$39,000.00
Analytics Platform	Analytics Platform	09/30/2020	\$50,000.00	\$30,000.00	\$265,000.00	\$120,000.00
Build out Skin Care Products	Build out Skin Care Products	12/31/2020	\$60,000.00	\$100,000.00	\$15,000.00	\$237,000.00
Change Mgmt Process	Change Mgmt Process	09/30/2020	\$100,000.00	\$50,000.00	\$0.00	\$0.00
Cyber Security Modernization	Cyber Security Modernization	09/30/2020	\$120,000.00	\$50,000.00	\$50,000.00	\$143,000.00
Design & Consulting Services	Design & Consulting Services	12/31/2020	\$2,000.00	\$50,000.00	\$4,000.00	\$30,000.00
Enterprise Mobility v4.2	Enterprise Mobility v4.2	12/31/2020	\$70,000.00	\$40,000.00	\$513,750.00	\$428,702.31
ERP Solution Upgrade	ERP Solution Upgrade	09/30/2020	\$110,000.00	\$100,000.00	\$37,000.00	\$49,000.00
Fun Project Request	Fun Project Request	12/31/2024	\$100,000.00	\$50,000.00	\$15,000.00	\$71,300.00
Increase Machine Inspections!	Increase Machine Inspections!	09/30/2020	\$250,000.00	\$200,000.00	\$356,000.00	\$301,833.34
Lean Six Sigma Project	Lean Six Sigma Project	12/31/2020	\$50,000.00	\$30,000.00	\$50,000.00	\$20,600.00
Mobile Application Project	Mobile Application Project	06/30/2021	\$5,000.00	\$20,200.00	\$15,000.00	\$176,264.68
Mobile Marketplace Upgrade	Mobile Marketplace Upgrade	09/30/2020	\$50,000.00	\$31,300.00	\$50,000.00	\$50,550.00
Pack and Ship Services	Pack and Ship Services	12/31/2020	\$50,000.00	\$30,000.00	\$50,000.00	\$30,300.00
Talent Management System	Talent Management System	09/30/2020	\$50,000.00	\$30,000.00	\$0.00	\$1,000.00

A	B	C	D	E	F	G	H	I	J	K	L	M
Title	03/31/2020	06/30/2021	09/30/2019									
#PM Methodology	\$100,000.00	\$50,000.00	\$15,000.00	\$71,300.00								
#Project Cost T									\$200,000.00	\$100,000.00	\$170,400.00	\$220,000.00
#SDLC Template												
1. Salesforce to	\$5,000.00	\$1,002,500.00	\$54,933.33	\$126,500.00								
Agile - Standar												
AI Interface Ro												
Analytics Platf												
Build out Skin												
Change Mgmt												
Cyber Security												
Design & Cons												
Enterprise Mob												
ERP Solution U												
Fun Project Re												
Increase Mach												
Lean Six Sigm												
Mobile Applicat					\$5,000.00	\$20,200.00	\$15,000.00	\$176,264.68				
Mobile Marketp												
Pack and Ship												
Talent Manage												
Grand total	\$105,000.00	\$1,052,500.00	\$69,933.33	\$197,800.00	\$5,000.00	\$20,200.00	\$15,000.00	\$176,264.68	\$200,000.00	\$100,000.00	\$170,400.00	\$220,000.00

# Request Cards – Now Max of 8 Details Fields

## Request Cards

Category: Project Request

### Available Fields ?

Type to Find Available Field

Additional Information

Approved Budget

Business Objective

Category

Description

Expected Benefit

Legacy Request ID

Legacy Request Log

Legacy Request Status

Est. Level of Effort (in hours)

Selected Card Fields (8) [Maximum of 8]

Move Up ↑

Move Down ↓

ID

Title (mandatory)

Requester

Business Sponsor

Current Gate

Pending Approvers

Gate Status

Score

Field: ID

Save

Cancel

↺

↻

Show Field Label ☐

Show Value in Bold ☐

Show as Italic ☐

Padding after this Field 0

<ID>

Title: <Title>

Requester: <Requester>

<Business Sponsor>

Current Gate: <Current Gate>

Pending Approvers: <Pending Approvers>

<Gate Status>

Score: <Score>

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# Upcoming Webinars/Events

- Q3 Roadmap webinar **August 25th**
- September release webinar **September 15<sup>th</sup>**

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 | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)  
**4/14/2021:** April Release | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)  
**5/19/2021:** May Release | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)  
**6/16/2021:** June Release | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)  
**7/14/2021:** July Release | [Q&A Transcript](#) | [View PDF](#) | [View Presentation](#)  
**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](#)  
**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](#)  
**5/26/2021:** Q2 Roadmap Webinar | [View PDF](#) | [View Presentation](#)  
**6/28/2021:** New Reports Enablement Webinar - 1.5 hour overview and demo session, two sessions:

- Session 1 | [View PDF](#) | [View Presentation](#)
- Session 2 | [View PDF](#) | [View Presentation](#)

**6/30/2021:** New Dashboards Enablement Webinar - 1.5 hour overview and demo session, two sessions:

- Session 1 | [View PDF](#) | [View Presentation](#)
- Session 2 | [View PDF](#) | [View Presentation](#)

**8/25/2021:** Q3 Roadmap Webinar | [Register](#)

# Virtual Planview *Accelerate* Customer Conference 2021



Reducing Risk in Security Technologies with Work Intake and Delivery



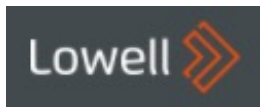
Be FLEXible: When and How to Use PPM Pro, Projectplace, and LeanKit to Achieve Project Success



How PPM Pro Evolved with an Evolving PMO



Drive Growth from Ideation and Execution



Introducing a PPM Tool to a Business





## Q&A

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Jennifer [jrose@planview.com](mailto:jrose@planview.com)





Thank You