

Planview PPM Pro User Types

Licensing Matrix

Overview

Planview PPM Pro™ is licensed based on user types.

The main license types are:

Portfolio Manager User

Perform strategic planning, manage demand and capacity, plan/manage resources and technology, and execute work.

Access to **all** end-user functionality.

Team Member User

Participate and collaborate on work intake and execution, including time reporting, as well as help maintain project tasks, logs, issues, and risks.

Access to **key** end-user functionality.

Stakeholder User

Visualize, evaluate, and monitor work intake and progress, drill down to work details, to make timely critical decisions for key objectives.

Access to **key** end-user functionality.

Portfolio Manager and Team Member licenses also include FLEX capabilities. Users can leverage the best solution for the work being delivered:

- **Lean-Agile Delivery:** Define team processes on configurable Kanban boards, manage the flow of work according to lean-agile principles, visualize dependencies within and across teams, and promote a culture of continuous improvement
- **Collaborative Work Management:** Project, team, and roadmap workspaces for collaboration, visual task management, document sharing, team member-driven status, and messaging

Other license type: The **Request User** can view, create, score, and submit requests for demand management.

The matrices on the following pages provide detail on the capabilities of each type.

Planview PPM Pro Core Functionality

"✓*" Denotes ability to view via report/dashboard drilldown

	Portfolio Manager FLEX	Team Member FLEX	Stakeholder	Requester
Requests & Work Intake	✓	Limited	Limited	Limited
Add/submit and view details	✓	✓	✓	✓
Place on hold/back in progress	✓	✓	✓	✓
Score, evaluate, rank, add notes, and attach links and files	✓	✓	✓	✓
Approve, reject, send back to a prior gate	✓	✓	✓	
Create/update associated entities and manage process	✓			
Project Portfolio Management	✓	Limited	Limited	
Work portfolios	✓			
View portfolios	✓	✓	✓*	
Create multi-level portfolios with % project inclusion	✓			
Projects	✓			
View project details, attachments, notes, team, and other elements	✓	✓	✓*	
Create, edit, and manage projects and project templates	✓			
Score, evaluate, and rank projects	✓			
Link and sync to Projectplace or LeanKit team workspaces	✓			
Project schedule, activities, tasks, resources, and status	✓			
View project plans and task details, including interactive Gantt	✓	✓	✓*	
Create project plans and tasks, top-down or bottom-up	✓			
Edit project plan and tasks, including spread-sheet style UI	✓			
View and edit assigned tasks (including mobile access)	✓	✓		
Manage cross- and intra-project task dependencies	✓			
Track % complete: Actuals, manual (simple, weighted, duration), # complete	✓			
Manage and assign resources	✓			
Project logs, risks, and issues	✓			
View details	✓	✓	✓*	
Create, view, edit, and manage	✓			
View and edit assigned	✓	✓		
Costs, revenue, and financials	✓			
View financial entries, planning, capex/opex, labor/non-labor, PMI metrics	✓	✓	✓*	
Edit financial details, entries, and project currency	✓			
Configure summary view with budget, forecast, and actuals over time	✓			
Manage project role and resource internal and billing rates	✓			
Resource Management	✓	Limited	Limited	
View resources and resource details	✓	✓*	✓*	
Create, view, edit, assign, and manage resources	✓			
Assess utilization, rebalance, and find demand via resource workbench	✓			
Centrally manage resources, staffing and approving resource requests	✓			
Manage internal and billing rates for roles and resources	✓			

Planview PPM Pro Core Functionality (cont.)

"✓*" Denotes ability to view via report/dashboard drilldown

	Portfolio Manager FLEX	Team Member FLEX	Stakeholder	Requester
Time Management	✓	Limited	Limited	
View timesheet entries and details	✓	✓	✓*	
Report/submit portfolio, project/task, and administrative time (mobile or UI)	✓	✓		
Approve time (including mobile access)	✓			
Manage process and adjust/sync rates on timesheets	✓			
Strategic, Outcome, and Capacity Planning	✓			
Predictive Portfolio Analysis - project/portfolio/resource optimization	✓			
Create and run scenarios	✓			
View and export scenario output	✓			
Capacity and demand	✓			
Run capacity and demand analytics	✓			
Create and run What-If scenarios	✓			
View and print What-If scenario output	✓			
Analytics and Reporting	✓	Limited	Limited	Limited
Reports and dashboards	✓			
WYSIWYG design, view, and edit reports	✓	✓		
WYSIWYG design, view, edit, publish and schedule dashboards	✓			
Export viewed reports and dashboards to Excel, PDF, and other formats	✓	✓	✓	
View special reports for KPI trends and audit history	✓	✓	✓	
Receive scheduled dashboard publications via email	✓	✓	✓	✓
Setup and extract data via Open Data Protocol (OData)	✓			
Perform Impact Analysis for resources/projects/portfolios/assets	✓			
Analyze permissions on and for entities via Permissions Explorer	✓			
Collaborative Work Management	✓	✓		
Create project, team, and roadmap workspaces	✓	✓		
Collaborate on workspaces and documents	✓	✓		
Execute team work with simple Kanban boards	✓	✓		
Manage personal tasks	✓	✓		
Status through mobile application	✓	✓		
Lean-Agile Delivery	✓	✓		
Define processes with Kanban boards and swim lanes	✓	✓		
Manage flow of work with board hierarchies	✓	✓		
Create, edit, and status cards	✓	✓		
Visualize connections and manage dependencies	✓	✓		
Lean-agile analytics	✓	✓		

Planview PPM Pro Core Functionality (cont.)

"✓*" Denotes ability to view via report/dashboard drilldown

	Portfolio Manager FLEX	Team Member FLEX	Stakeholder	Requester
Application Portfolio Management	✓	Limited	Limited	
Application portfolios	✓			
View portfolios	✓	✓	✓*	
Create portfolios	✓			
Manage applications	✓			
View application details	✓	✓	✓*	
Create and edit details	✓			
Manage and assign applications and assets	✓			
Application utilization	✓			
View financial details	✓	✓	✓*	
Edit financial details	✓			
Track time, costs, and Total Cost of Ownership	✓			
General User Interface	✓	✓	Limited	Limited
Select UI display themes, navigation order, grid columns, card groupings	✓	✓	✓	✓
Perform global search and ad hoc or saved filtering on entities	✓	✓		
Select language: English, Spanish, French, German, Swedish, Portuguese	✓	✓	✓	✓
Access and download contextual help	✓	✓	✓	✓
Add and manage permitted entity files, links, notes, and associated entities	✓	✓		
Configure and manage permitted entity alerts	✓	✓		
System Administration	✓			
Configure timesheet settings (cost normalization, auto-approval) and alerts	✓			
Manage users, groups, roles, organization hierarchy, and permissions	✓			
Fully configure entity categories, available fields, details, and other sections	✓			
Configure request workflow gate approver and gate skipping logic	✓			
Manage effective-dated role, resource, and currency exchange rates	✓			
Perform cross-product user management (PVID)	✓			
Manage KPI trend fields and health profiles	✓			
Create entity calculated fields	✓			
Anonymize terminated resources (GDPR)	✓			
Set up Web Services API integrations	✓			
Data import new and updated entities from Excel	✓			

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