What's New in the Planview Customer Success Center

We are continually enhancing the Planview Customer Success Center. Please come back here to see some of the changes we have recently made:

Customer Success Center

May 2018

You probably have already seen it, but we have a brand new homepage for the Planview Customer Success Center! We have made it faster and easier for you to find what you are looking for. We also created a new guided tour video to show you around the new homepage navigation. Let us know your feedback about the new design here.

With the release of Planview Enterprise One release 16 we have an updated Planview Products Central. See below under Planview Enterprise One to find out more specifics about this release.

We have created a central place to learn about the new General Data Processing Regulation (GDPR) from the European Union. There you will find out how to perform some of the GDPR processes in all of our products. We also included links to our new portal to make Data Subject Access Requests (DSARs) and to our new Agreements page with the latest Data Processing Agreements (DPAs). You will also see our new Cookie Manager appear on the Success Center so that you can see and manage the browser cookies we use.

We've added the ability to subscribe to pages on the Customer Success Center and be notified by email when they change! This is one of our most requested features! We have a help page to show you how to subscribe to pages and manage your subscriptions. Note that you need an account on the Customer Success Center and be signed in to be able to subscribe to pages.

January 2018

We have added Google Translate to the Planview Customer Success Center! You can now translate any page into the supported languages. Simply use the globe icon in the upper right of any page and select your language. Note that this is machine translated, and understandably not as good as human translated pages. For those pages on our site with human translations (primarily Planview Enterprise and Planview Enterprise One - Portfolio and Resource Management product help pages) the globe will expand to show you those languages as well as the Google Translate widget for additional languages.
October 2017

Planview has announced Planview® Enterprise One, the best way to manage work and resources. Learn more about Planview Enterprise One in Planview Products Central. Get help and detailed information about Planview Enterprise One here.

Introducing the New FastTrack Analytics! The RPM Analytics have been rebranded to the FastTrack Analytics and with this change comes a whole host of new features and enhancements.

The New FastTrack Analytics were released October 27th and we invite customers to upgrade at their convenience - This version of the FastTrack Analytics can be deployed for any MS SQL database customer using Planview Enterprise 13 onwards. Refer to the Release Notes for full details of the enhancements and changes in this release.

September 2017

Planview Enterprise content in the Planview Training Academy has been reorganized. Where applicable, there are now two courses for various topics. “Getting Started” courses consist mainly of e-learning and training pages and are introductory. “Mastering” courses contain product help and other more in-depth information for those who want to explore a topic in greater detail.

July 2017

We have added a quick way to access Customer Care product support for all our products with the Support link on the footer of every page.

June 2017

We have launched the Planview Training Academy! The Training Academy is the best place to teach yourself about the most popular subject areas for all of our products. It combines curated blended media types including e-learning, product help articles, exercises, assessment, job aids, and other helpful resources to support self-paced learning. The user interface streamlines the experience of learning about Planview products.

We have added a new section for webinars showcasing our customers’ success using our products.

Planview Products Central has been completely updated, including information and videos about Planview Enterprise 14, Troux 14, Innotas, and Projectplace.
Planview Enterprise One

October 2018

We are creating new "advanced topics" articles for Planview Enterprise One - PRM. They have been integrated into the relevant Planview Training Academy curricula (currently mostly Investment and Capacity Planning and Financial Management topics). The easiest way to keep up with new articles is to click the star icon at the top of this page and subscribe to updates.

August 2018

The training material on using the Planview Enterprise One - PRM Add-In for Microsoft® Project has been added as a curriculum the Planview Training Academy. It has been updated with new screenshots and keystroke steps for use with Microsoft Project 2016 and PRM release 16.

Our popular Planview Enterprise One - Portfolio and Resource Management Job Aids have been updated, where necessary, to release 16. For any Job Aid that differs between release 15 and release 16, a menu at the top lets you select the version you want to see. Information that is the same for both releases remains the same. We welcome your suggestions for additional Job Aids.

July 2018

Looking for a concise overview of what the most common Planview Enterprise One - Portfolio and Resource Management menus are used for? Our latest PRM overview e-learning video is just what you need. It covers My Overview, Work, Resources, Strategies, Investment and Capacity Planning, Reports, and more. This is a great "first look" at the application. There is a version of this video for release 15 and release 16 (includes new Work and Assignments screen name and Shift view in Investment and Capacity Planning).

We completed the release 16 update of the Planview Academy courses on Planview Enterprise One - Portfolio and Resource Management. For any page that differs between release 15 and release 16, a menu at the top lets you select the version you want to see. Information that is the same for both releases remains the same. The most significant updates are in the Investment and Capacity Planning courses.

May 2018

We have released Planview Enterprise One release 16! You can find out more in Planview Products Central. Click on these links for detailed release notes for Planview Enterprise One - Portfolio and Resource Management (PRM) and Planview Enterprise One - Capability and Technology Management.

We have created a new Product Releases page where we will maintain patch and release notes for every major and minor release of Planview Enterprise One and its associated add-ons. If you are an administrator and would like to be informed of every major and minor release, we recommend that you subscribe to this page. Want to
know more about subscriptions? Click here...

April 2018

The QuickStart Guides, which are handy to get up and running with Planview Enterprise One - Portfolio and Resource Management, have been updated and revised for release 15.

Content on using the Projectplace Connector from within Planview Enterprise One - Portfolio and Resource Management has been integrated into the Planview Academy courses. Two new topics are: Understand Project Creation with the Projectplace Connector and Understand How Projectplace Connector Synchronization Affects the Work Schedule.

March 2018

Extensive information explaining how the Projectplace Connector works to associate projects in Portfolio and Resource Management with Projectplace workspaces is available on the Projectplace Connector Use Cases and Maturity Journey area. You’ll find information on all the ways the Connector can be used, and hints for the best way to maximize a successful coordination between Projectplace and Portfolio and Resource Management.

Our popular Portfolio and Resource Management Job Aids have been updated for the current release! You are welcome to download them and modify them to fit your organization’s needs. Job Aids are also linked in the relevant courses in the Planview Academy.

The Planview Academy courses for Planview Enterprise One - Portfolio and Resource Management have been completely updated. They now contain all material from the training material we have created, including new mixed media files with links to relevant e-learning. This eliminates duplicate topics and results in a smooth flow of topics.

Are you new to Planview Enterprise One - Portfolio and Resource Management? Our newest Planview Academy course, Introduction to Portfolio and Resource Management, provides a high-level overview of concepts and functionality of the system. It’s ideal for use during the FastTrack implementation, or for a quick review.

We have created Planview Enterprise One - Portfolio and Resource Management training information on using PowerPoint Timeline with project Gantt charts and outcome and strategy roadmaps.

February 2018

Additional Planview Enterprise One - Portfolio and Resource Management courses for Administration are now available in the Planview Training Academy.

January 2018

Planview Enterprise One - Capability and Technology Management courses are now available in the Planview Training Academy. All courses for Release 15 are available at this time. Visit the Planview Enterprise One -
Capability and Technology Management Training Academy to train at your own pace.

Additional Planview Enterprise One - Portfolio and Resource Management courses are now available in the Planview Training Academy. This is where you will now find introductory and in-depth online training and e-learning content. Curricula added this month so far include: Strategic Planning and Outcomes and Investment and Capacity Planning.

December 2017

Planview Enterprise One - Portfolio and Resource Management courses are now available in the Planview Training Academy. This is where you will now find introductory and in-depth online training and e-learning content. Curricula available so far include: Projects and Work, Resource Management, Concepts, and Time Reporting.

October 2017

Welcome to Planview Enterprise One, the best way to manage work and resources. Learn more about Planview Enterprise One in Planview Products Central. Get help and detailed information about Planview Enterprise One here.

Planview PPM Pro

September 2018

We've released a new overview video about Permissions. Watch Permissions Overview.

August 2018

We have a new series of videos on creating and managing Projects:

- Navigate the Projects List View
- Create a Project
- Manage a Project

July 2018

Check out our new video covering GDPR compliance!
June 2018

Just released! We have a new series of videos about the Resource Workbench:

- Resource Workbench Navigation
- Resource Workbench Allocation
- Resource Workbench Find Demand

May 2018

We've released the latest in our series of report and dashboard exercises:

- Exercise: Portfolio Project Status List Report
- Exercise: Project Health Portfolio Dashboard
- Exercise: Project Health Pie Chart

March 2018

We have been busy re-branding and updating the look and feel of our PPM Pro video library! New videos are coming soon.

January 2018

We've released the latest in our series of report and dashboard exercises:

- Exercise: Resource Capacity Crosstab List Report
- Exercise: All Active Projects Timeline Gantt Report

May 2017

We have added a new video for Internal Rates and Effective Dating.

January 2017

We have added a number of new e-learning videos, including the following:

- Create a Dashboard
- Publish a Dashboard
- Exercise: Capacity and Demand Crosstab Report
- Exercise: All Active Projects Timeline Gantt Report
- Task Dependencies
December 2017

We have new Community Discussion Forums! You can interact with your fellow Innotas users in any of the categories show on our new Community Discussions page. So please join the conversations!

July 2017

We have added several new e-learning videos, as well as product help content for our ongoing monthly releases.

New videos include:

- Timesheet Entry
- Internal Rates and Effective Dating
- Creating a Report

May 2017

We have added a summary of the new and improved feature in Innotas in the first half of 2017, including a series of videos.

April 2017

We have launched the Innotas Success Center! The Innotas Success Center contains all of the existing product help, as well as new training videos, and will soon include a new forum platform. When you are using Innotas, click the help icon from any screen to be directed to the related success center article.

Check out the new training videos! We have the following videos available now:

- Application Overview
- Navigating the Innotas Header
- Navigating the Grid and Entity Details
- Using Filters
- Creating Filters

Review the Getting Started guide, or any other area of documentation.

Visit the Release Information section for updates on the latest product releases.
Planview Projectplace

December 2017

In addition to regular product help updates, we have also created a new Projectplace Training Academy! The Projectplace Training Academy presents the video and help article content in a blended, sequential ordering of curricula and courses. Visit the Academy today to learn more about Projectplace!

July 2017

We have added content for several new features that have been released in the past three months, including:

- Card dependency relationships
- Custom fields on cards
- Updated add-on apps for document management
- Uplifted user interface for the Documents tool
- Reporting time in Roadmap workspaces
- Team Overview dashboard

April 2017

New features have been released, including Teams and Roadmaps. To learn more about Teams and Roadmaps, refer to the release notes for March and April.

A new video Create and Manage Teams is available to show account administrators and team administrators how to manage teams.

The support center has now been integrated into the Customer success center, including Frequently Asked Questions (FAQs) and the possibility to chat with a support representative or send in a support ticket. The support center is available in six different languages.

January/February 2017

A new video Work with Conversations helps you get started with effective online team communication that can reduce e-mailing.

The learning paths found on the Get started page, now have an improved design that makes it easier for users to navigate them.
December 2016

A number of learning paths has been added to the Get started page, that enables users to find their path to learning Projectplace. A learning path is a selection of customer success center pages and videos, that the user can step through and gain an understanding of Projectplace concepts and learn how to use the different Projectplace tools.

The new video Work with Boards gives a quick overview of how to get started working with cards on boards.

November 2016

A brand new video has been released that gives all tips and tricks to work efficiently in the Plan tool. Check out Work with the Plan.