



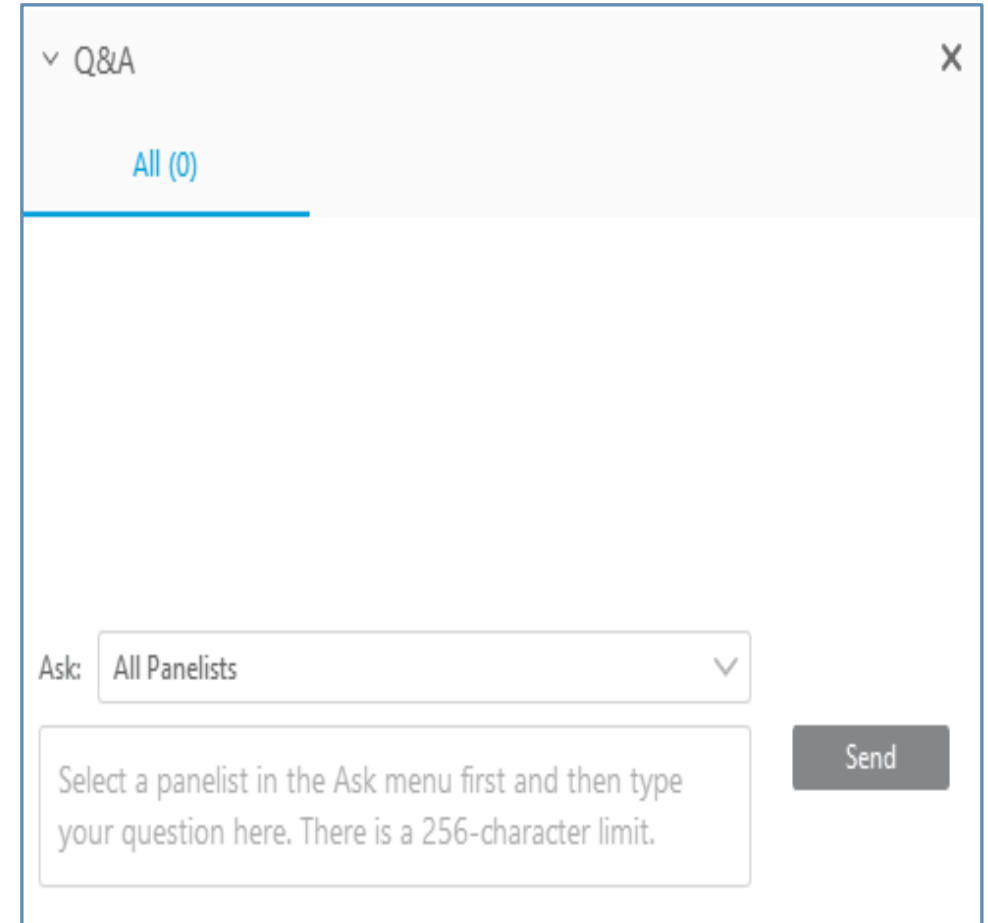
Exporting to Office Timeline from Enterprise One PRM

Eddy Malik, Co-Founder, Office Timeline
Laura Iles, Consultant, Planview



Housekeeping Items

- 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 top right of the WebEx window
- Webinar is being recorded
- Recording and slides will be shared



The screenshot shows a Q&A interface within a WebEx window. At the top left, there is a dropdown menu labeled 'Q&A' with a downward arrow. To the right of this menu is a close button 'X'. Below the menu, the text 'All (0)' is displayed in blue. A horizontal blue line separates this header from the main content area. In the main area, there is a dropdown menu labeled 'Ask:' with the selected option 'All Panelists' and a downward arrow. Below this menu is a text input field with the placeholder text: 'Select a panelist in the Ask menu first and then type your question here. There is a 256-character limit.' To the right of the text input field is a dark grey button labeled 'Send'.

Planview Customer Community presentations

Available on the Customer Success Center

<https://success.planview.com/?cid=community>



Registration is now open!
Horizons.Planview.com



Planview Planning Inner Circle

We invite you to learn and grow your planning maturity through the Planview Planning Inner Circle

For more information about the group and how to sign-up, check out the [Planning Capabilities Inner Circle Infographic](#)



Planview Customer Community

Exporting to Office Timeline from Enterprise One PRM

Laura Iles and Eddy Malik



Agenda

1. Background

2. Demo:

- Use Case 1 – Project Manager producing high-level project schedule visualization to include in status reporting
- Use Case 2 – Program Manager providing high-level update to Program Board on program roadmap and associated projects
- Use Case 3 – Product Manager producing visualization of outcome roadmap

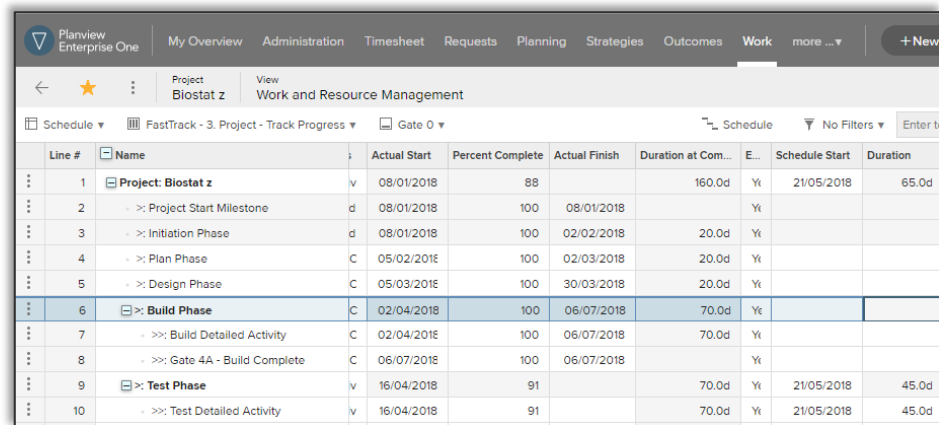
3. Overview of Office Timeline and Office Timeline Plus Capabilities

Background

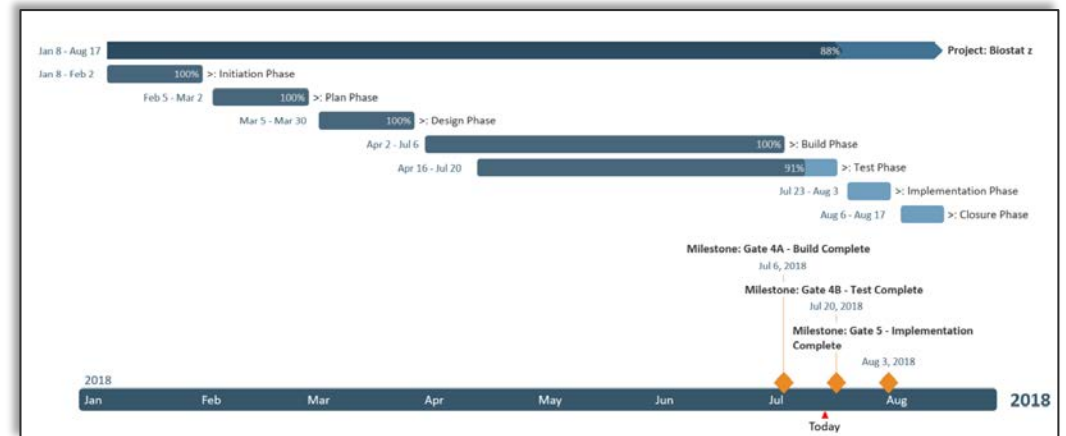
- With Enterprise One PRM, release 15.3, we can now export portfolio or individual work, strategy, or outcome schedules and milestones to a presentation-ready roadmap in PowerPoint
- Our Hosting Team will enable the functionality by default when customers migrate to E1, 15.3
- Only available for SaaS customers
- No client side installation required – items are exported as native PowerPoint objects
- Option to upgrade to Office Timeline Plus

Quickly Generate Presentation-Ready Visuals

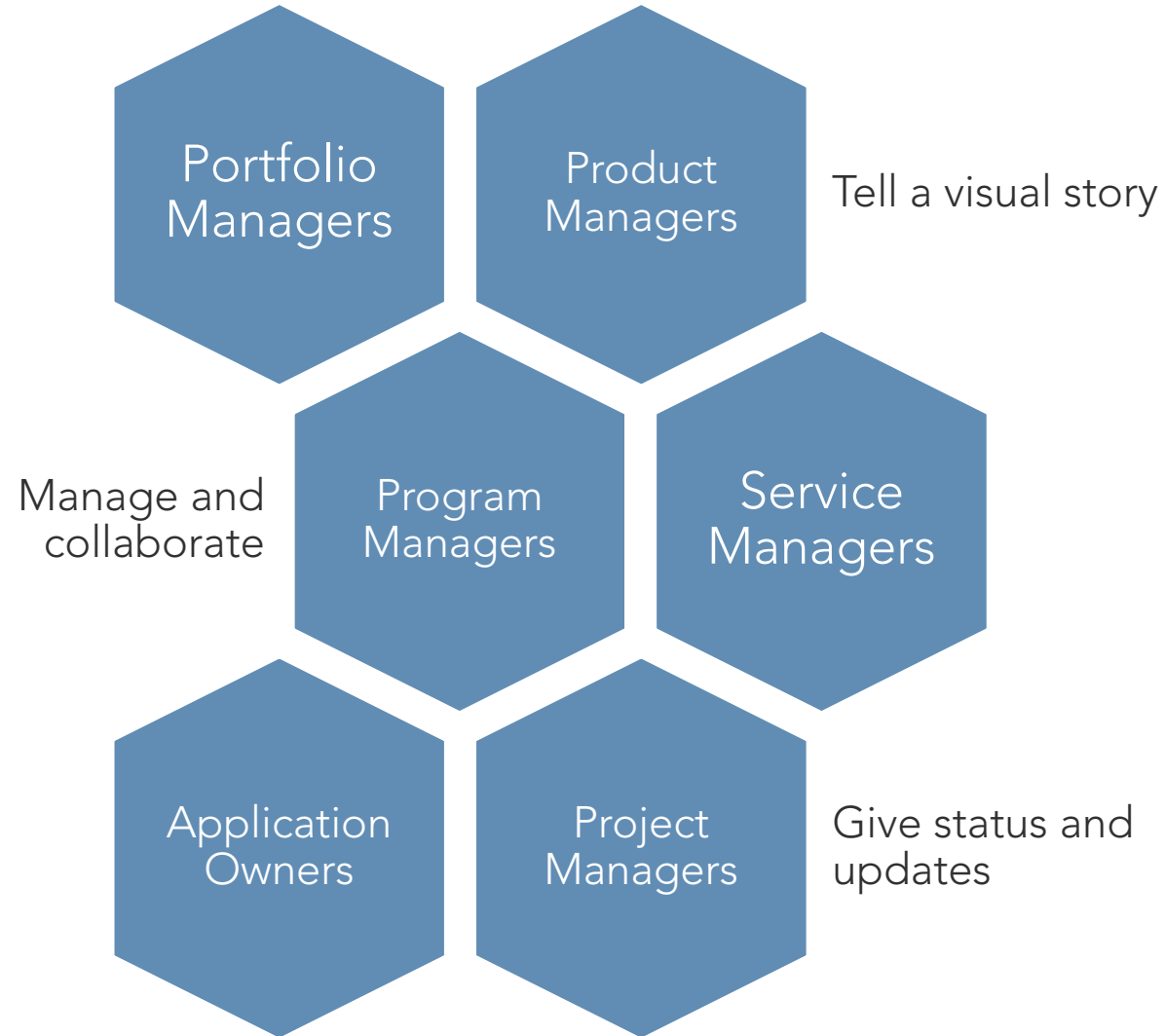
- PowerPoint is often the primary form of communication to key stakeholders
- Product, program, and project managers can now seamlessly create Microsoft Office PowerPoint graphics of roadmaps and Gantt charts by exporting Planview Enterprise One data
- Reduce the time it takes to create presentations with E1 data
- Leverage native PowerPoint capabilities



Line #	Name	Actual Start	Percent Complete	Actual Finish	Duration at Com...	E...	Schedule Start	Duration
1	Project: Biostat z	08/01/2018	88		160.0d	Yt	21/05/2018	65.0d
2	>: Project Start Milestone	08/01/2018	100	08/01/2018		Yt		
3	>: Initiation Phase	08/01/2018	100	02/02/2018	20.0d	Yt		
4	>: Plan Phase	05/02/2018	100	02/03/2018	20.0d	Yt		
5	>: Design Phase	05/03/2018	100	30/03/2018	20.0d	Yt		
6	>: Build Phase	02/04/2018	100	06/07/2018	70.0d	Yt		
7	>>> Build Detailed Activity	02/04/2018	100	06/07/2018	70.0d	Yt		
8	>>> Gate 4A - Build Complete	06/07/2018	100	06/07/2018		Yt		
9	>: Test Phase	16/04/2018	91		70.0d	Yt	21/05/2018	45.0d
10	>>> Test Detailed Activity	16/04/2018	91		70.0d	Yt	21/05/2018	45.0d



Who?



Consistent Navigation across Application

The image displays two overlapping screenshots of the Planview Enterprise One application interface. The top screenshot shows the 'Strategies Menu' with a list of strategy portfolios. A red box highlights the 'Export as PowerPoint Timeline' option in the 'Action' menu. A blue callout bubble points to this option with the text 'Export option added to Action Menu'. The bottom screenshot shows a 'Portfolio View' for 'A Program'. A red box highlights the 'Export as PowerPoint Timeline' option in the 'Action' menu. A blue callout bubble points to this option with the text 'Export also available from within a portfolio or entity view'. Another blue callout bubble points to the 'Export as PowerPoint Timeline' option in the 'Action' menu of the top screenshot with the text 'Allows for fast export without having to open up a portfolio or entity view'.

Export option added to Action Menu

Allows for fast export without having to open up a portfolio or entity view

Export also available from within a portfolio or entity view

Enable Export to PowerPoint Timeline

Administration > Menus and Ribbons > Menu Actions

Planview Enterprise One | My Overview | Requests | Strategies | Planning | Work | Resources | Expenses | Customers | Contracts | Administration | more ... | + New | Search...

← Menus and Ribbons

Menus | Menu Order and Color | View Ribbons | Entity View Tabs | Entity View Tabs by Attribute | Column Set Defaults

Requests

Strategies

Planning

Work

Resources

Outcomes

Enable for Work, Strategies, and/or Outcomes

Display	Description	Feature
<input type="checkbox"/>	Portfolio View	
<input checked="" type="checkbox"/>	Find/Replace Work Description	Add/Delete Projects ✖
<input checked="" type="checkbox"/>	Manage Work	Use Manage Work Application ✖
<input checked="" type="checkbox"/>	Notifications	
<input checked="" type="checkbox"/>	Export as PowerPoint Timeline	
<input checked="" type="checkbox"/>	Content	
<input checked="" type="checkbox"/>	Portfolio Description	
<input checked="" type="checkbox"/>	Portfolio Member	
<input checked="" type="checkbox"/>	Portfolio Community	
<input checked="" type="checkbox"/>	SharePoint Community	Use SharePoint Community ✖
<input checked="" type="checkbox"/>	Refresh	
<input checked="" type="checkbox"/>	Delete P	
<input checked="" type="checkbox"/>	+ Create Column Set Model	

Work

Display	Description	Feature
<input checked="" type="checkbox"/>	Work View	
<input checked="" type="checkbox"/>	Work and Resource Management	
<input checked="" type="checkbox"/>	Financial Planning Detail	View Work Financial Plans ✖
<input checked="" type="checkbox"/>	Roll-up Financial Plans	
<input checked="" type="checkbox"/>	Spread-down Financial Plans	
<input checked="" type="checkbox"/>	Time Approval	Approve Time ✖
<input checked="" type="checkbox"/>	Notifications	
<input checked="" type="checkbox"/>	Sponsorship	
<input checked="" type="checkbox"/>	Content	
<input checked="" type="checkbox"/>	Projectplace	
<input checked="" type="checkbox"/>	Export as PowerPoint Timeline	
<input checked="" type="checkbox"/>	SharePoint	Use SharePoint Community ✖
<input checked="" type="checkbox"/>	Delete Work	Add/Delete Projects ✖

Enable for portfolios

Enable for single entity

Cancel Save

Pre-requisites

- Required features:
 - For a Work portfolio or work entity: View Project & Resource Mgmt. or Use Project & Resource Mgmt.
 - For a Strategy portfolio or strategic entity: View Strategic Management or Use Strategic Management
 - For an Outcome portfolio or outcome: View Outcomes or Use Outcomes
- Required global options:
 - For a Work portfolio or work entity: Use Project and Resource Management
 - For a Strategy portfolio or strategic entity: Use Strategic Management
 - For an Outcome portfolio or outcome: Use Outcome Portfolio Management
- Required grants: Read-only or read-write grants to the entities for which you are exporting data

User Experience

Export as PowerPoint Timeline

Select All | 98 rows selected | Please deselect items for a smaller number of items being sent to Office Timeline. Less than 30 items is suggested.

	Description	Actual/Schedule Start	Actual/Schedule Finish	Percent Complete
<input checked="" type="checkbox"/>	Work: Foam Sole	3/13/2016	1/22/2018	53.00%
<input checked="" type="checkbox"/>	Phase: Project Management	7/5/2017	11/2/2017	50.00%
<input checked="" type="checkbox"/>	Phase: Business Modeling	3/13/2016	3/25/2016	100.00%
<input checked="" type="checkbox"/>	Phase: Requirements	3/20/2016	7/29/2016	100.00%
<input checked="" type="checkbox"/>	Phase: Analysis and Design	4/17/2016	7/27/2016	100.00%
<input checked="" type="checkbox"/>	Milestone: Analysis Complete		2/7/2017	
<input checked="" type="checkbox"/>	Phase: Implementation	11/2/2017	1/19/2018	24.00%
<input checked="" type="checkbox"/>	Phase: Testing	7/10/2016	10/28/2016	100.00%
<input checked="" type="checkbox"/>	Phase: Deployment	8/7/2016	12/30/2016	100.00%
<input checked="" type="checkbox"/>	Phase: Project Closeout	1/19/2018	1/22/2018	78.00%
<input checked="" type="checkbox"/>	Milestone: Project Completion		1/22/2018	
<input checked="" type="checkbox"/>	Phase: New Phase	11/10/2017	1/19/2018	
<input checked="" type="checkbox"/>	Phase: Show Requirement Rate Rol...	2/6/2017	1/18/2018	
<input checked="" type="checkbox"/>	Work: Cushioned inserts	10/11/2015	9/5/2018	70.00%

Customize this timeline in Microsoft PowerPoint using Office Timeline
Learn more

Helpful Tip
Set entities you want to export as "Show on Roadmap"

- 50 item limit
- Warning in red
- Export button is disabled
- Number of items selected displayed

Export as PowerPoint Timeline

Select All | 30 rows selected | More than 30 items selected to be sent to Office Timeline may produce an unreadable output. Please consider removing some items from the export.

	Description	Actual/Schedule Start	Actual/Schedule Finish	Percent Complete
<input checked="" type="checkbox"/>	Work: Foam Sole	3/13/2016	1/22/2018	53.00%
<input checked="" type="checkbox"/>	Work: Cushioned inserts	10/11/2015	9/5/2018	70.00%
<input checked="" type="checkbox"/>	Work: Mesh Material	10/12/2015	10/16/2018	51.00%
<input checked="" type="checkbox"/>	Work: Embedded Sensor in Mesh Mate...	11/13/2016	3/22/2018	21.00%
<input checked="" type="checkbox"/>	Work: A NEW HIGH PRIORITY Project	2/6/2017	7/27/2017	
<input checked="" type="checkbox"/>	Work: Product Line Marketing Launch	2/6/2017	12/22/2017	
<input checked="" type="checkbox"/>	Work: Market Research Project	2/6/2017	4/12/2017	
<input checked="" type="checkbox"/>	Work: Customer Mobile Data Collectio...	2/6/2017	4/24/2018	
<input checked="" type="checkbox"/>	Work: Iteration 1	1/26/2018	5/31/2018	
<input checked="" type="checkbox"/>	Work: Iteration 2	4/16/2018	8/31/2018	
<input checked="" type="checkbox"/>	Work: Iteration 3	9/3/2018	1/22/2019	
<input checked="" type="checkbox"/>	Work: Iteration 4	1/2/2019	5/21/2019	

Customize this timeline in Microsoft PowerPoint using Office Timeline
Learn more

Helpful Tip
Set entities you want to export as "Show on Roadmap"

Export Cancel

- 30 – 50 items
- Warning in yellow
- Export button enabled

User Experience

AutoSave Off | PlanviewExport (64).pptx - Saved to this PC | Carina Hatfield

File Home Insert Design Transitions Animations Slide Show Review View Help Tell me what you want to do

Clipboard Slides Font Paragraph Drawing Editing WebEx

1 [Gantt Chart Overview]

2 [Slide Navigation]

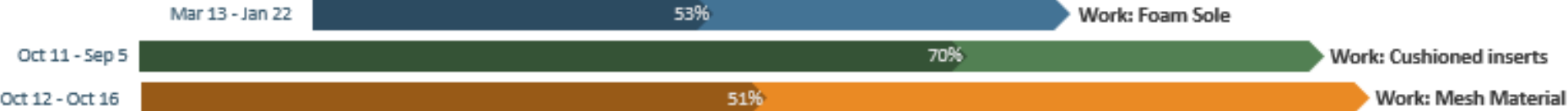
Work: Foam Sale (53%) | Phase: Project Management (50%) | Phase: Business Modeling (100%) | Phase: Requirements (100%) | Phase: Analysis and Design (50%) | Phase: Testing (100%) | Phase: Deployment (100%) | Phase: Project Closeout (78%) | Phase: New Phase (100%) | Phase: Show Requirement Rate Role Override (70%) | Activity: Project Planning (100%) | Activity: Project Management (93%) | Activity: QA and CM (74%) | Phase: Requirements Definition (100%) | Activity: Project Scope Definition (100%) | Activity: User Needs Definition (100%) | Activity: Requirements Process and Data Models (100%) | Work: Mesh Material (53%) | Work: Embedded Sensor in Mesh Material (21%) | Work: A NEW HIGH PRIORITY Project (21%) | Work: Product Line Marketing Launch (21%) | Work: Market Research Project (21%) | Work: Customer Mobile Data Collection Project (21%) | Work: Iteration 1 (21%) | Work: Iteration 2 (21%) | Work: Iteration 3 (21%) | Work: Iteration 4 (21%)

Milestone: Set Lifecycle Stage to "Scope and Plan" (Aug 30, 2016)
Milestone: Set Execution Stage to "Concept" (Aug 31, 2016)
Milestone: Project Planning Completed (Feb 3, 2017)
Milestone: Analysis Complete (Feb 7, 2017)
Milestone: Project Completion (Jun 22, 2018)

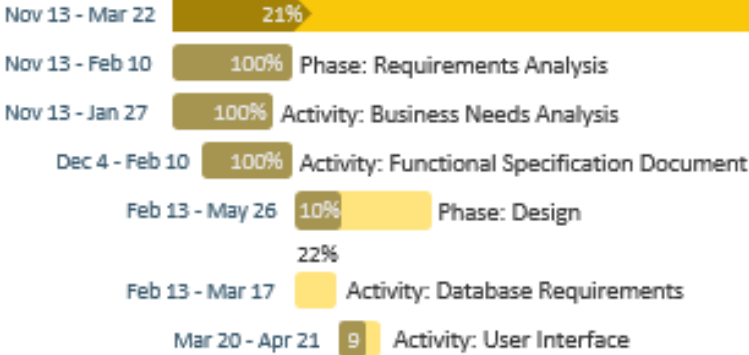
2015 2016 2017 2018 2019 Today

Planview Enterprise One Template

Standard Enterprise One template (color palette)



Color gradient used for parent and child entities



% Complete



Milestones on timeline

Demo

- Use Case 1 – **Project Manager** producing high-level project schedule visualization to include in status reporting
- Use Case 2 – **Program Manager** providing high-level update to Program Board on program roadmap and associated projects
- Use Case 3 – **Product Manager** producing visualization of outcome roadmap

Supporting CSC Content

The following content is available in the Customer Success Center:

- Process overview for exporting data to Office Timeline PowerPoint – [CSC Home > Planview Enterprise One > Portfolio & Resource Management > Fundamentals > Overview > Screen Basics > Exporting Data as a PowerPoint Timeline](#)
- Pre-requisites for exporting data to Office Timeline PowerPoint – [CSC Home > Planview Enterprise One > Portfolio & Resource Management > Fundamentals > Overview > Screen Basics > Exporting Data as a PowerPoint Timeline > Exporting Data as a PowerPoint Timeline Pre-requisites](#)