



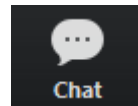
PPM Pro Customer Webinar: August 2018 Release

Jennifer Rose, PPM Pro Product Manager
Heather Pritchard, PPM Pro Managing Consultant



Housekeeping Items

- 30-35 minutes of presentation
- Remainder Q&A
- All lines are on mute
- Enter questions into the Chatbox
 - 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



Today's Agenda

- Monthly Release Process
- About Sandboxes
- Rolling Beta features
 - Project Financials
 - Requests Revamp
- Coming Soon
- Q&A



Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro



Release Information



New Features and Release Notes



Monthly Release Schedule

First
Friday

- Release Notes Published

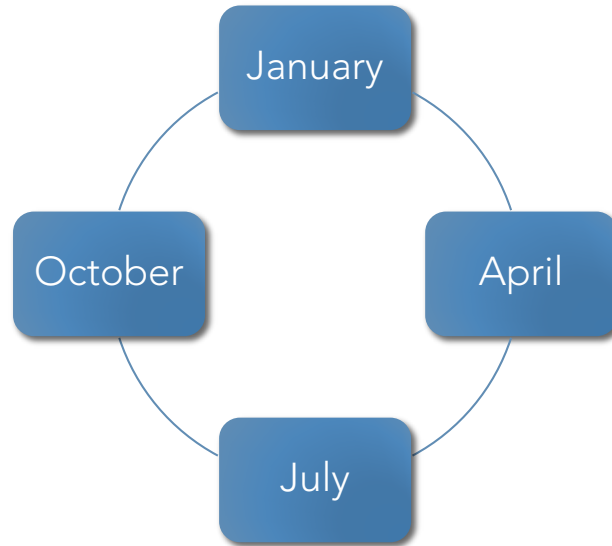
Second
Friday

- Release deployed to sandbox environments

Third
Friday

- Release deployed to production environments

Features move from Beta to GA once a quarter



- Between GA releases, Beta features are available in sandboxes
- Beta features can be enabled in production environments by request. Note that any issues you discover will be fixed as part of the normal development cycle.

Get early access to features in your sandbox

- A sandbox is a snapshot of your production environment
- Beta functionality is enabled in sandboxes by default
- Don't have one? Contact your Account Manager (additional fee)

Note: Sandbox data cannot be refreshed between the second and third Fridays of the month



Current Month's Feature Status

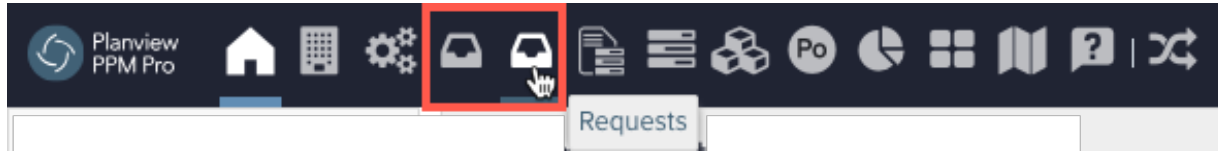


Requests Revamp Phase 1 (rolling)
Project Financials (rolling)



Request Revamp - Review

- Existing requests renamed to “Legacy Requests”
- New Requests tab in top navigation upon opt-in
- Hover text “Requests”
- Can opt-in in production; already enabled in sandboxes



Request Revamp – Rolling Beta

Current Beta Functionality

- New Requests UI for composing requests
- Configure request types using Self-Service Administration
- New graphical, status-based card view
- Associate requests with new and existing projects
- New Request Status field
- Ability to copy notes and attachments to associated entities
- Request category-based permissions
- Reporting
- Governed by permission profiles

Future Releases

- Ability to associate and map requests with tasks, project logs
- Gates
- Approvals
- Data Import (new)
- API

Project Financials – Rolling Beta

Prior Releases

- Project level management of forecasts and actuals
- Self-service admin configuration
- API capabilities
- Reporting and calculated fields
- Data import
- Alerts
- Rollups
- Template copy ability

August Release

- Filters
- Ability to print grid
- Additional reporting fields
- Fixes for known issues

Future Releases

- GA
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Project Financials – Rolling Beta

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Project Financial Entries – Filters

Financial Entries

Forecast Amount is greater than 5... ✕

⊕ ⊖ New Actual New Forecast ▾ Actions ▾ 🖨 📅 ⚙

Info	Title	Forecast Amount ↓	Actuals Amount	Variance	Entry From Date	Entry To Date	Category	Cash
	Total	(\$63,000.00)	\$0.00	(\$63,000.00)				
	Partly Cloudy	\$33,000.00	\$0.00	\$33,000.00	8/1/2018	12/31/2018	General Expense	Outflow
	Rainy	\$20,000.00	\$0.00	\$20,000.00	6/22/2018	12/31/2018	General Expense	Outflow
	Humid	\$10,000.00	\$0.00	\$10,000.00	6/22/2018	8/22/2018	General Expense	Outflow

Project Financial Entries – Print Grid

Print Options

Print size:
Letter

Orientation:
Landscape

Font Size:
12

Print list/chart on one page (shrinking columns as necessary)

Print columns:

- Title
- Info
- Title
- Forecast Amount
- Actuals Amount
- Variance
- Entry From Date

Selected columns will span 1 page

OK Cancel

Financial Entry Reports – New Fields

- Added to All Financial Entries report sources
 - Entry To Date Month (all output types)
 - Entry From Date Month (all output types)
 - Entry To Date and Entry From Date (X-axis for Column, Pie, Crosstab, Bubble) (already available on list reports)
- Added to Financial Entries Time Series reports
 - Date category field (X-axis) (column)

Financial Entry Reports – Signed Fields

- New “Signed” fields
 - Signed Forecast Amount
 - Signed Actual Amount

Financial Planning - Signed Fields

	8/1/2018			
	Signed Forecast	Forecast	Signed Actuals	Actuals
Global Transparency	(\$2,650.00)	\$23,850.00	(\$9,800.00)	\$19,800.00
Expense	(\$5,000.00)	\$5,000.00		
Expense 2	(\$8,250.00)	\$8,250.00		
Expense Actual			(\$14,800.00)	\$14,800.00
Income	\$5,000.00	\$5,000.00		
Income Actual			\$5,000.00	\$5,000.00
Income 2	\$5,600.00	\$5,600.00		

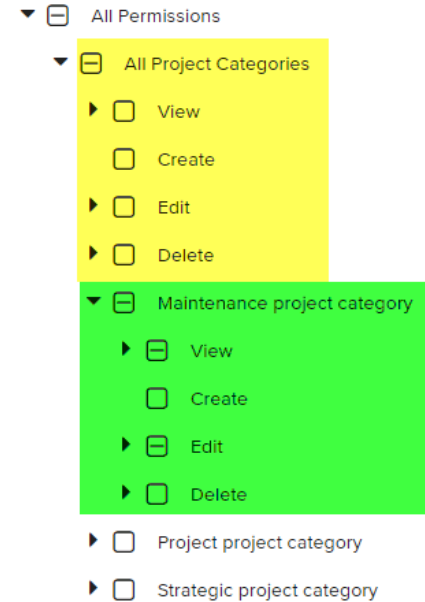
Enhancements This Month

- Permissions by Project Category
- Resource Workbench Utilization Hover
- Dashboards
 - Ability to notify dashboard publisher prior to expiry date
 - Dashboard Publish Notification Email Configuration
 - Enforce IP Restrictions on Published Dashboards

Enhancements This Month

- Permission profiles by Project Category

Permission Hierarchy



Enhancements This Month

- Notification of dashboard expiration date

Publish Options

Expires on: ⓘ
9/3/2018

Notify dashboard publisher 5 days before expiration date ⓘ

Allow viewers to export dashboard data to Excel

User authentication required to view dashboard

Do not require any authentication
 Require user to be logged in to PPM Pro
 Require user to enter an access code: ⓘ

.....

IP Restriction ⓘ

Publish Cancel

Enhancements This Month

- Customized alert for dashboard refresh

Update Options for Published Dashboard

IP Restriction ⓘ

Configure publishing schedule

After: ⓘ
1:00 AM

Daily Weekly Monthly

Every 1 days

Notification Email Address(es):
jrose@planview.com, spackebush@planview.com

Email subject
Check out this fresh update!

Email message:
If no Email subject and message are entered, the standard notification will be sent. Message must be less than 4000 characters.

A link to the published dashboard will appear below the email message

Publish Cancel

Enhancements This Month

- IP restrictions for published dashboards

The screenshot shows the 'Organization Info' settings page for 'Famous Frames (ftrue@docume...)'. The left sidebar lists various sections, with 'Info' selected. The main content area includes a 'Save' and 'Cancel' button, and several sections: 'Basic Information' with fields for Organization Name, Web Site, and Primary Administrator; 'Time and Expense Period' set to 'Weekly (Mon-Sun)'; and 'Enforce Strong Passwords' (unchecked). A red box highlights the 'Enforce IP Restrictions on Published Dashboards' checkbox, which is checked.

The screenshot shows the 'Update Options for Published Dashboard' settings page. It includes the URL of the published dashboard and the expiration date (9/8/2018). There are checkboxes for 'Notify dashboard publisher' (unchecked), 'Allow viewers to export dashboard data to Excel' (unchecked), and 'IP Restriction' (checked). A red box highlights the 'IP Restriction' checkbox. Below the 'IP Restriction' checkbox is a text input field for the IP address. There is also a 'Configure publishing schedule' checkbox (unchecked).

Coming Soon

- Request Revamp Beta continues
- “Spreadsheetsification”



Upcoming Webinars and Events

- September Release Webinar
 - September 15, 10:30am CDT
- Planview Horizons Conference
 - October 10-12, Austin, TX
 - horizons.planview.com



Q&A



Thanks for watching!