



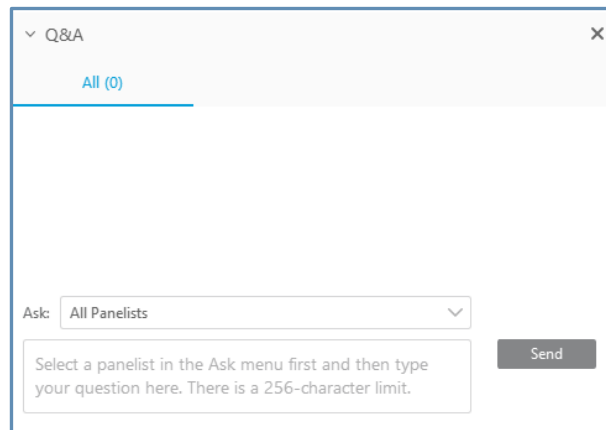
PPM Pro Customer Webinar: July 2018 Release

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 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



Today's Agenda

- Monthly Release Process
- About Sandboxes
- Rolling Beta features
 - Project Financials
 - Requests Revamp
- Features 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

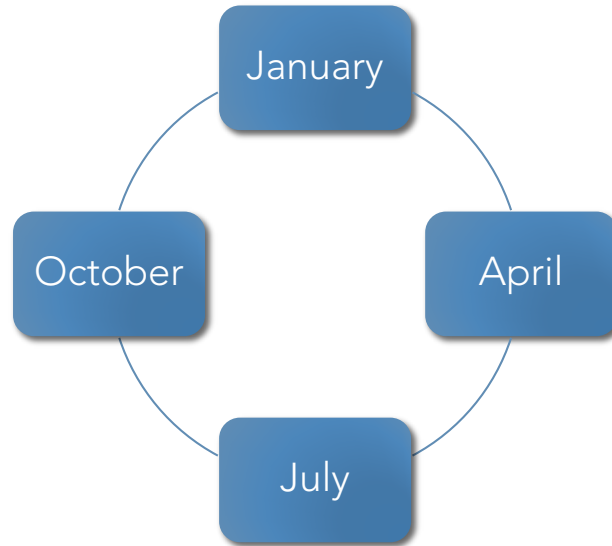
Second
Friday

- 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: We can't refresh your sandbox data between the second and third Fridays of the month



Current Month's Feature Status



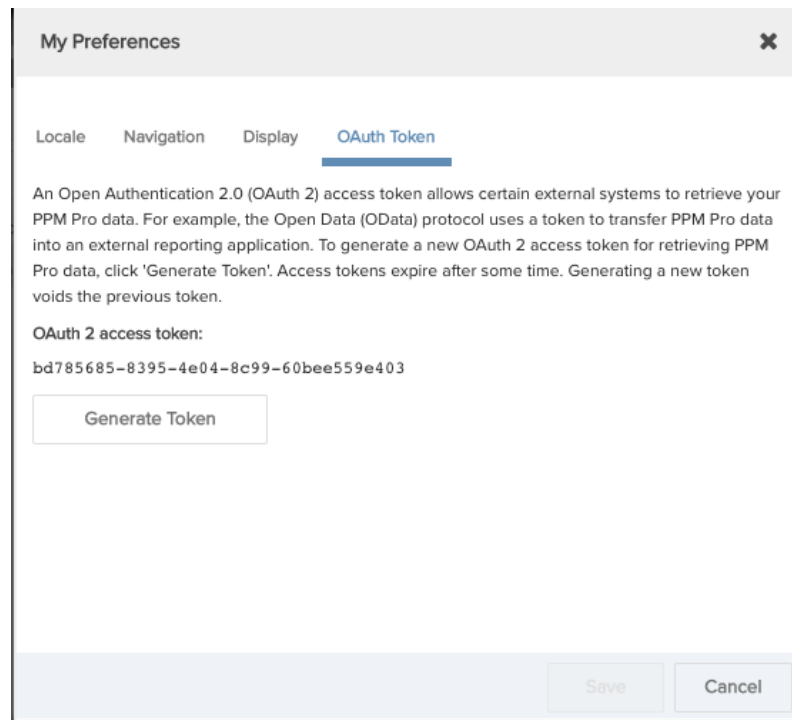
Requests Revamp Phase 1 (rolling)
Project Financials (rolling)



KPI Trend Report Source
OData feed

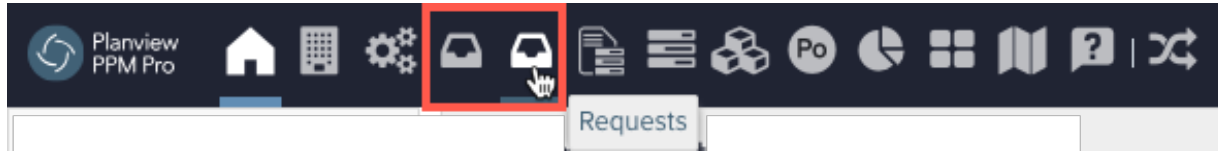
OData Update

- Existing beta customers:
 - Currently uses WS API login credentials
 - With production release, use OAuth token for OData access
- If you are about to configure OData access, wait for Friday's release



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 sandbox and/or production



Request Revamp – Rolling Beta

June Release

- 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
- Governed by permission profiles

July Release

- Ability to copy notes and attachments to associated entities
- Request category-based permissions
- Reporting

Future Releases

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

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Requests – Composing View

Request UI matches other areas of product

All Requests

(None) (1)

1975852187
Outlook Upgrad
Jones, Margaret
6/22/2018

New Request

Basic Details	Project Information
Title *	Business Sponsor
Requester	Division
Status	Brief Description of Proposed Solution
Scoping Estimates	
Desired Start Date	
Desired Completion Date	

Please enter values for required fields.

Save Cancel

Planview PPM Pro Release Webinars

Requests – Card View

Card-based view allows request movement based on status

The screenshot displays the Planview PPM Pro interface in a card view. The top navigation bar includes the Planview PPM Pro logo, a search bar with the text "Find All" and "Type Keyword, ID, or Na...", and various utility icons. Below the navigation bar, the main content area is titled "All Requests" and features a filter input field, a dropdown menu, and buttons for "New", "Actions", "Print", and "Settings".

The requests are organized into six columns based on their status:

- (None) (1)**: Contains one request card with ID 1975952187, titled "Outlook Upgrade" by Jones, Margaret, dated 6/22/2018.
- New (2)**: Contains two request cards. The first has ID 1975952189, titled "Critical Request" by Jones, Margaret, dated 6/20/2018. The second has ID 1975952104, titled "New Product Launch" by Richards, Steve, dated 8/1/2018.
- In Progress (1)**: Contains one request card with ID 1975952098, titled "Request for New Work" by Jones, Margaret, dated 6/12/2018.
- Approved (1)**: Contains one request card with ID 1975952191, titled "Tablet Deployment" by Jones, Margaret, dated 6/29/2018.
- Rejected**: This column is currently empty.
- On Hold**: This column is currently empty.

At the bottom left of the interface, there is a link for "Planview PPM Pro Release Webinars".

Requests – Copy Notes, Attachments

The screenshot displays the 'Big Data Management Services' interface. At the top, there are tabs for 'Details', 'Notes (2)', 'Attachments (1)', and 'Associations'. Below the tabs, there are buttons for 'Add Note' and 'Actions'. The main area shows a list of notes with columns for 'By', 'Note', and 'On'. A context menu is open over the first note, with the 'Copy Note to Associated Entity' option highlighted. A red arrow points from this option to a dialog box titled 'Copy Note to Associated Entity'. The dialog box contains a table of associated entities with checkboxes for selection.

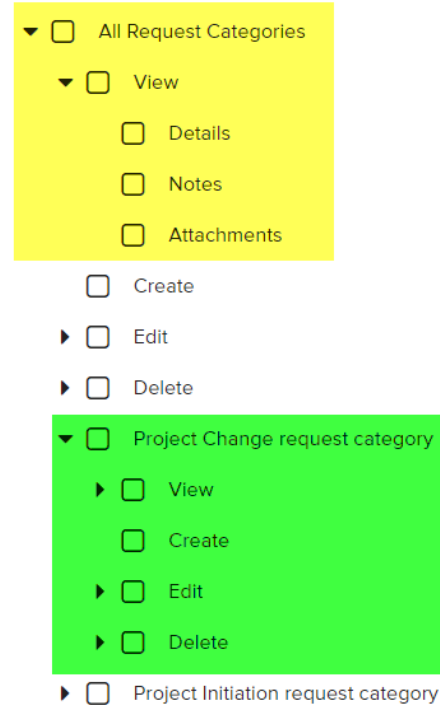
Entity Type	Title
<input type="checkbox"/>	Project ISample Template
<input type="checkbox"/>	Project # Demo Flow Template
<input type="checkbox"/>	Project Big Data
<input type="checkbox"/>	Project Big Data Management Services

Buttons at the bottom of the dialog: Copy Note, Cancel

New in July Release

Requests – Permissions

- New in July release
- Permissions now controlled by profiles
- Ability to set permissions for all requests, or by request type



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Project Financials – Rolling Beta

May Release

- Project level management of forecasts and actuals
- Self-service admin configuration
- API capabilities

July Release

- Reporting and calculated fields
- Data import
- Alerts
- Rollups
- Template copy ability

Future Releases

- GA
- Fixes for known issues

Project Financials – Rolling Beta

May Release

- Project level management of forecasts and actuals
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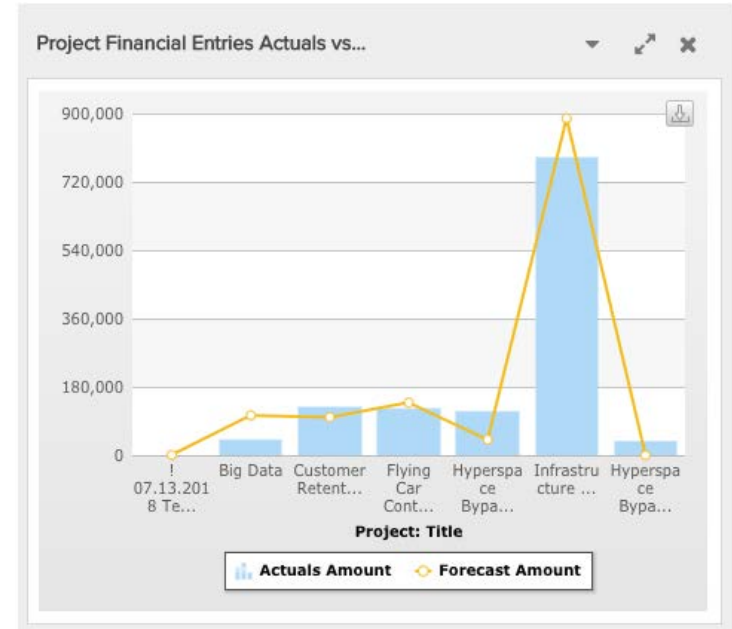
Future Releases

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Project Financial Entries - Reports

Flying Car Control System All Financial Entries

Financial Entry Type	Title	Cash	Entry From Date	Entry To Date	Forecast Amount	Actuals Amount	Variance
Forecast	Labor Expense	Outflow	5/7/2018		\$50,000.00	\$50,750.00	(\$750.00)
Actual	Contractors	Outflow	5/8/2018	12/31/2018	*	\$50,750.00	*
Forecast	New vehicles	Outflow	7/12/2018	10/12/2018	\$200,000.00	\$100,000.00	\$100,000.00
Actual	Porsche	Outflow	7/12/2018		*	\$100,000.00	*
Forecast	Overhead	Outflow	5/10/2018		\$500.00	\$300.00	\$200.00
Actual	April General Expense	Outflow	4/10/2018		*	\$200.00	*
Actual	May General Expense	Outflow	5/10/2018		*	\$100.00	*
Forecast	Project Revenue	Inflow	5/8/2018	6/1/2018	\$38,000.00	\$5,000.00	\$33,000.00
Actual	HyperSpace Project Income	Inflow	5/7/2018		*	\$5,000.00	*



Project Financial Entries - Reports

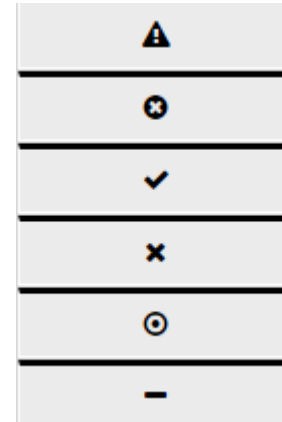
Select Report Source ? x

Target Category

Target	Category	Report Source ↑	Description	Output Types
Organization	Finance	All Financial Entries	A report on all Financial Entries, including Forecasts and Actuals	
Project	Finance	All Financial Entries on a Project	A report on all Financial Entries on a Project, including Forecasts and Actuals	
Department	Finance	All Financial Entries on Projects in a Department	A report on all Financial Entries on a Projects in a Department, including Fore...	
Division	Finance	All Financial Entries on Projects in a Division	A report on all Financial Entries on a Projects in a Division, including Forecast...	
Portfolio	Finance	All Financial Entries on Projects in a Portfolio	A report on all Financial Entries on a Projects in a Portfolio, including Forecast...	
Portfolio	Finance	All Financial Entries on Projects in a Portfolio and its Sub Portfolios	A report on all Financial Entries on a Projects in a Portfolio and its Sub Portfoli...	
Project	Finance	All Financial Planning by Financial Entries on a Project Time Series	A report on Financial Entries on a Project over time.	
Department	Finance	All Financial Planning by Financial Entries on Projects in a Department Time Seri...	A report on Financial Entries on Projects in a Department over time.	
Division	Finance	All Financial Planning by Financial Entries on Projects in a Division Time Series	A report on Financial Entries on Projects in a Division over time.	
Portfolio	Finance	All Financial Planning by Financial Entries on Projects in a Portfolio and its Sub P...	A report on Financial Entries on Projects in a Portfolio and its Sub Portfolios o...	
Portfolio	Finance	All Financial Planning by Financial Entries on Projects in a Portfolio Time Series	A report on Financial Entries on Projects in a Portfolio over time.	
Organization	Finance	All Financial Planning by Financial Entries Time Series	A report on Financial Entries over time	

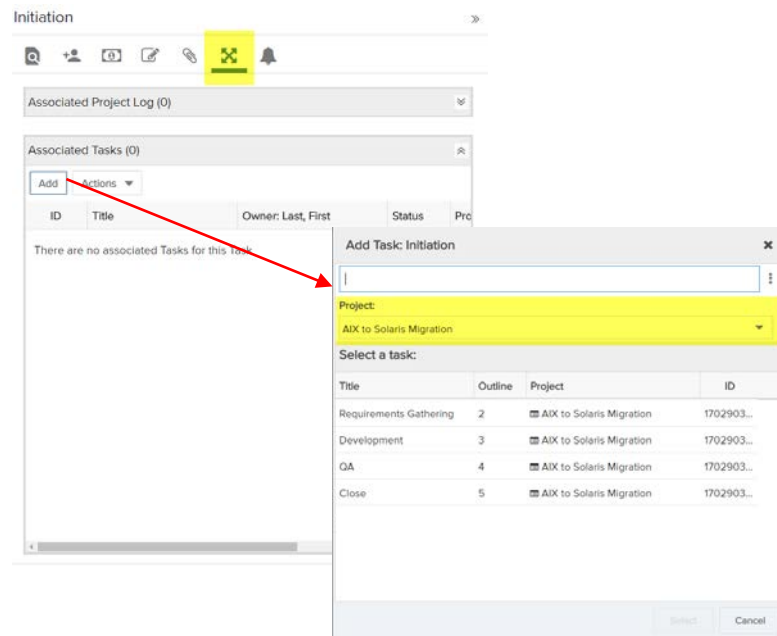
Enhancements This Month

- Additional icons for lookup lists



Enhancements This Month

- When associating project logs/tasks, a new Project filter has been added
- Default is to show items from the current project



Enhancements This Month

- View Timesheets action in Resource Workbench
- Add/remove Allocation columns

The screenshot displays the 'My Resources (44)' interface. At the top, there is a filter bar and a toolbar with buttons for 'Find Demand...', 'Email', 'Actions', and a gear icon. Below this is a table of resources with columns for months from Jul '18 to Jan '19. The table shows allocation percentages for several resources, with some rows highlighted in yellow. An 'Actions' menu is open on the right side of the table, with 'View Timesheets' selected and highlighted in blue. Two red arrows point from the top right of the slide to the 'View Timesheets' option and the gear icon in the toolbar. Below the resource table, there is a section for 'Allocations: Pritchard, Heather' with an 'Actions' dropdown and an 'Interval: Monthly' selector. The bottom part of the screenshot shows two empty tables with the message: 'The selected resources have no allocations during the displayed time interval.'

Photo	Name: Last, First	Jul '18	Aug '18	Sep '18	Oct '18	Nov '18	Dec '18	Jan '19
	Mims, Pamela	0%	0%	0%	0%	0%	0%	0%
	Omura, Katie	50%	50%	50%	50%	50%	50%	50%
	Perez, Miro	0%	0%	0%	0%	0%	0%	0%
	Pritchard, Heather	0%	0%	0%	0%	0%	0%	0%
	Richards, Steve	25%	25%	25%	25%	25%	25%	25%
	Rose, Jennifer	0%	0%	0%	0%	0%	0%	0%

Coming Soon

- Request Revamp Beta continues
- “Spreadsheetsification”



Upcoming Webinars and Events

- August Release Webinar
 - August 15, 10:30am CDT
- Planview Horizons Conference
 - October 10-12, Austin, TX



Q&A





Thanks for watching!