



PPM Pro Customer Webinar: September 2018 Release

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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
- Planview Horizons
- Rolling Beta features
 - Spreadsheet-Style Task Editor
 - Project Financials
 - Requests Revamp
- Coming Soon
 - Multi-Currency Support
- Q&A



Find the release notes on the web

https://success.planview.com/Planview_PPM_Pro

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customer success center

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[Click here to purchase PPM Pro consulting hours and consultant-led workshops.](#) Services packages include a variety of workshops with our experienced consultants, delivered virtually.

Monthly Release Schedule

First
Friday

- Release Notes Published

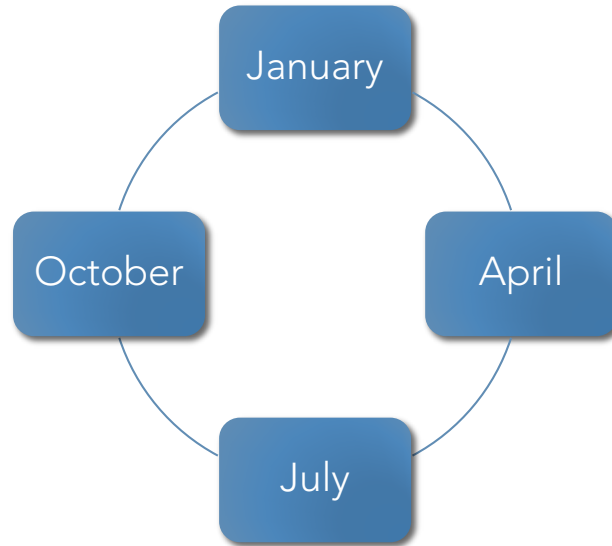
Second
Friday

- 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



Planview Horizons User Conference

- October 10-12, Austin, TX
- JW Marriott downtown
- <https://horizons.planview.com>
- Registration still open!



Horizons PPM Pro Sessions

Customer Presentations

- Empower your Resource Managers
- Project Qualification/Selection
- Getting the Most out of Resource Scheduling
- PPM Orchestration with PPM Pro and Tableau
- Leveraging Investment Categories using PPM Pro Scoring
- PPM Pro Customer Panel

Product Management

- #ICYMI – Cool PPM Pro Capabilities and Time Savers
- Horizons PPM Pro Inner Circle – Financial Summary
- Office Hours for PPM Pro everyday!

Meet the Experts

- Reporting & Dashboards
- User Adoption
- Achieving Business Value
- OData
- Resource Management
- Calculated Fields

Current Month's Feature Status



Spreadsheet-Style Editor (rolling)
Requests Revamp Phase 1 (rolling)
Project Financials (rolling)



Spreadsheet-style Task Editor

Edit: Tablet Deployment Tasks ? x

Save Save & Close Cancel

Tablet Deployment Tasks

	Info	Outl...	Title	Duration	Start Date	Target Date	Complete Date	Predecessors	Status	Type	% Comp...	Scheduled...	Task Hours To...	Actual ...	Milestone Date
			All Tasks	646 days	9/1/2016 9:00 AM	2/27/2019 5:00 PM					100.00%	0.00	0.00	1,286.00	
1	1	1	Inception	10 days	9/1/2016 9:00 AM	9/14/2016 5:00 PM			Open		100.00%	0.00	0.00	60.00	
2	2	2	Analysis	125 days	10/5/2016 9:00 AM	3/31/2017 5:00 PM		1	Open		100.00%	0.00	0.00	420.00	
3	3	3	Design	34 days	4/3/2017 9:00 AM	5/19/2017 5:00 PM		2	Open		100.00%	0.00	0.00	526.00	
4	4	4	Development	95 days	5/22/2017 9:00 AM	9/29/2017 5:00 PM		3	Open		100.00%	0.00	0.00	280.00	
5	5	5	Documentation and Validation	25 days	10/2/2017 9:00 AM	11/3/2017 5:00 PM		4	Open		0.00%	0.00	0.00	0.00	
6	6	6	▼ Training/Support	342 days	11/6/2017 9:00 AM	2/26/2019 5:00 PM		5	Open		0.00%	0.00	0.00	0.00	
7	7	6.1	Task Name	5 days	11/6/2017 9:00 AM	11/10/2017 5:00 PM			Open		0.00%	0.00	0.00	0.00	
8	8	6.2	Task 2	5 days	11/1/2017 9:00 AM	11/7/2017 5:00 PM			Open		0.00%	0.00	0.00	0.00	
9	9	6.3	Task 3	20 days	11/6/2017 9:00 AM	12/1/2017 5:00 PM			Open		0.00%	0.00	0.00	0.00	
10	10	6.4	Task 4	107 days	12/4/2017 9:00 AM	5/1/2018 5:00 PM		9	Open		0.00%	0.00	0.00	0.00	
11	11	6.5	Task 5	10 days	5/2/2018 9:00 AM	5/15/2018 5:00 PM		10	Open		0.00%	0.00	0.00	0.00	
12	12	6.6	Task 6	30 days	5/16/2018 9:00 AM	6/26/2018 5:00 PM		11	Open		0.00%	0.00	0.00	0.00	
13	13	6.7	Task 7	25 days	6/27/2018 9:00 AM	7/31/2018 5:00 PM		12	Open		0.00%	0.00	0.00	0.00	
14	14	6.8	Task 8	150 days	8/1/2018 9:00 AM	2/26/2019 5:00 PM		13	Open		0.00%	0.00	0.00	0.00	
15	15	7	Project Completion	1 day	2/27/2019 9:00 AM	2/27/2019 5:00 PM		6	Open		0.00%	0.00	0.00	0.00	

Spreadsheet-Style Task Editor – Rolling Beta

September Release

- Keyboard and editing interaction like a spreadsheet, including Undo/Redo
- Copy/paste to and from other spreadsheet tools, such as Excel and Google Sheets
- Handles up to 250 of a project's tasks
- Basic validation and correction handling
- **Sandboxes only – file a Support ticket to enable**

October Release

- Can opt-in for production use (target)
- Basic reconciliation guidance (target)
- TBD

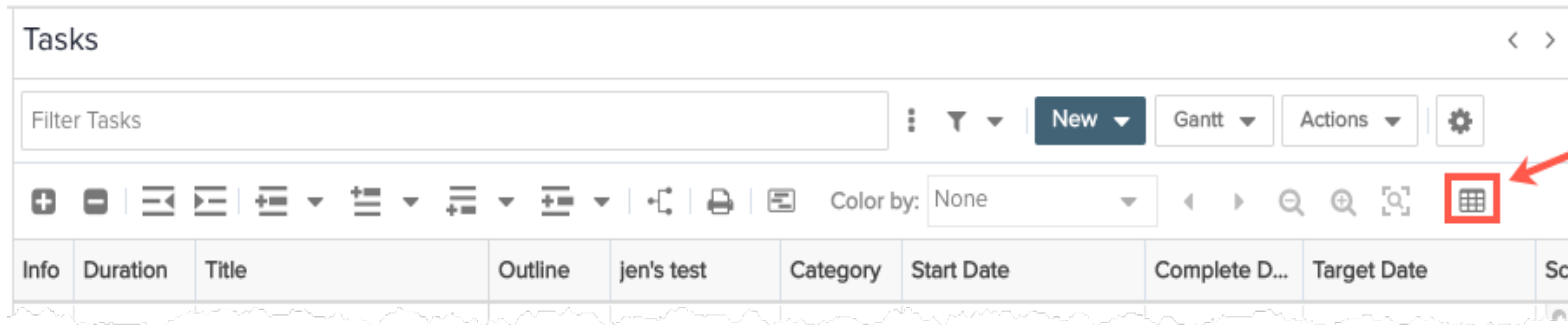
Future Releases

- Ability to handle larger numbers of tasks
- Additional reconciliation support
- Concurrent editing



Spreadsheet-Style Task Editor

Toggle/editor available for users with Project > Edit > Tasks permission



The screenshot shows the 'Tasks' interface in Planview. At the top, there is a 'Filter Tasks' search bar. Below it is a toolbar with buttons for 'New', 'Gantt', and 'Actions', along with a settings gear icon. A secondary toolbar contains various task management icons, including a 'Color by' dropdown set to 'None'. A red box highlights a grid icon in the bottom right of the toolbar, with a red arrow pointing to it from the text 'Click to enter spreadsheet-style editor'. Below the toolbar is a table with columns: Info, Duration, Title, Outline, jen's test, Category, Start Date, Complete D..., Target Date, and Sc.

Info	Duration	Title	Outline	jen's test	Category	Start Date	Complete D...	Target Date	Sc
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Click to enter
spreadsheet-style
editor

Spreadsheet-style Task Editor

Edit: Tablet Deployment Tasks ? x

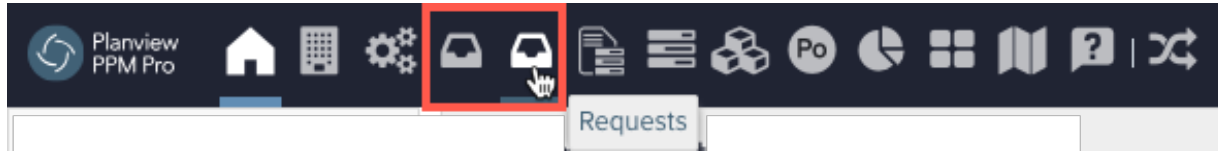
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Request Revamp - Review

- 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, **tasks, and issues**
- New Request Status field
- Ability to copy notes and attachments to associated entities
- Request category-based permissions
- Reporting
- Governed by permission profiles

Future Releases

- Gates
- Approvals
- Data Import (new)
- API

Project Financials – Rolling Beta

Current Beta Functionality

- Project level management of forecasts and actuals
- Self-service admin configuration
- API capabilities
- Reporting and calculated fields
- Data import
- Alerts
- Rollups
- Template copy ability
- Filters
- Ability to print grid
- Additional reporting fields
- Fixes for known issues

Future Releases

- GA (October target)
- Fixes for known issues

Financial Entry Reports

- New Field
 - Actuals Amount (No Rollup)

- Relabeled Fields
 - Forecast Amount (Signed)
 - Actuals Amount (Signed)

Financial Entry Reports

Financial Entries on a Project ▼ ✕

Title	Cash	Forecast Amount	Actuals Amount	Actuals Amount (No Rollup)
Contractors	Outflow	\$300,000.00	\$65,000.00	
Invoice for Contractors	Outflow	*	\$65,000.00	\$65,000.00
General Hardware	Outflow	\$25,000.00	\$3,300.00	
Cisco Switches	Outflow	*	\$2,500.00	\$2,500.00
Juniper Switches	Outflow	*	\$800.00	\$800.00
Miscellaneous Fees	Inflow	\$2,500.00	\$1,500.00	
Fees	Inflow	*	\$1,500.00	\$1,500.00
Supplies	Outflow	\$15,000.00	\$1,600.00	
Supplies	Outflow	*	\$1,600.00	\$1,600.00
Tablets	Outflow	\$10,000.00	\$7,500.00	
Tablet Accessories	Outflow	*	\$1,500.00	\$1,500.00
Tablets	Outflow	*	\$6,000.00	\$6,000.00
Vendor	Outflow	\$20,000.00	\$15,000.00	
Cognizant Cost	Outflow	*	\$15,000.00	\$15,000.00

Financial Entry Reports

Report Details : Financial Entries on a Project

Basic Details **Output Options** Visibility

Output Types <<

Field Selection **Sorting** List Options

Output Types <<

List Report

Available Fields <<

Financial Entry

- Common (11)
 - \$ Actuals Amount
 - \$ Actuals Amount (No Rollup)
 - \$ Actuals Amount (Signed)
 - A Cash
 - Entry From Date
 - Entry To Date
 - Financial Entry Type
 - \$ Forecast Amount
 - \$ Forecast Amount (Signed)
 - # ID
 - A Title
- All (32)
 - \$ Actuals Amount

Selected Fields

Object	Field	Display Name	Max Width	Horizontal All...	Vertical Align...	Aggregate	Drilld...	Drilldown Tar...	Display Data As
Financial Entry	</> Title (inde...	Title	Auto	Left	Top	Unavailable	☐	Not Specified	
Financial Entry	A Cash		Auto	Left	Top	Unavailable	☐	Not Specified	
Financial Entry	\$ Forecast A...		Auto	Left	Top	No Calculation	☐	Not Specified	
Financial Entry	\$ Actuals Am...		Auto	Left	Top	No Calculation	☐	Not Specified	
Financial Entry	\$ Actuals Am...		Auto	Left	Top	No Calculation	☐	Not Specified	

Standard User-Defined Calculated

Run Save & Run Save Close

Enhancements This Month

- Financial Entry attachments are also included in the project/Attachments section, in addition to the entry's Attachments tab.

Enhancements This Month

- Financial Attachments in Project/Attachments

← Projects **Hyperspace Bypass**

Sections << Attachments (6)

Details Add Actions

Title	Category	Content	File Size	Attached To	Last Modified By	Last Modified Date
www	Contract	uber.png	77.80 KB	Hyperspace Bypass (Project)	True, Frank	11/15/2016 12:03 PM
jamie_lee.jpeg	Contract	jamie_lee.jpeg	759.90 KB	Initiation (Task)	True, Frank	9/30/2016 9:26 AM
where am I?	Contract	dept_team_proj_per...	92.30 KB	Fine-tune Requirements (Task)	True, Frank	7/26/2018 11:08 AM
aaa	Contract	jen.png	142.50 KB	additional GPS scenarios to QA (Issue/Risk)	True, Frank	10/27/2016 10:07 AM
where am I?	Contract	bulk_add_member.p...	167.40 KB	additional GPS scenarios to QA (Issue/Risk)	True, Frank	7/26/2018 11:10 AM
ToDoList.xlsx	Contract	ToDoList.xlsx	66.70 KB	Partly Cloudy (Forecast)	True, Frank	9/13/2018 10:23 AM

Portfolios (1)
Notes (0)
Status Comments ...
Attachments (6)
Baselines

Coming Soon

- Request Revamp Beta continues
- Spreadsheet-style Task Editor rollout continues
- Multi-Currency Support



Upcoming Webinars and Events

- October Release Webinar
 - October 17, 10:30am CDT



Q&A