PPM Pro Customer Webinar: September 2018 Release

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Heather Pritchard, PPM Pro Managing Consultant

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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

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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

Monthly Release Schedule

First Friday
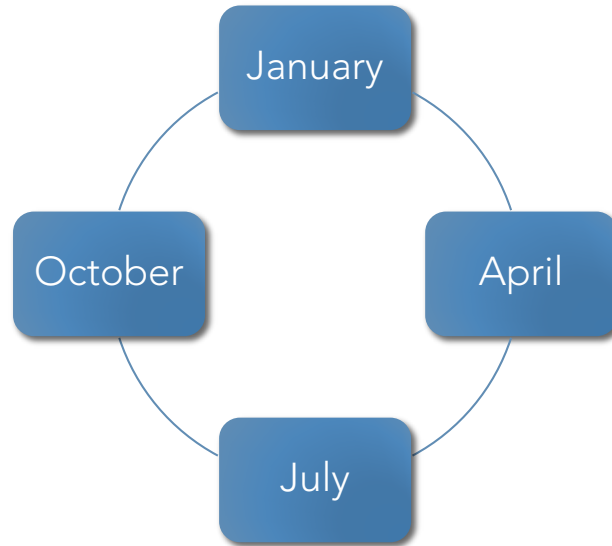- Release Notes Published

Second Friday
- Release deployed to sandbox environments

Third Friday
- Release deployed to production environments

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Features move from Beta to GA once a quarter

January

April

July

October

- 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.

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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

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Planview Horizons User Conference

- October 10-12, Austin, TX

- JW Marriott downtown

- https://horizons.planview.com

- Registration still open!

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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

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Current Month's Feature Status

Beta

Spreadsheet-Style Editor (rolling)

Requests Revamp Phase 1 (rolling)

Project Financials (rolling)

GA

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Spreadsheet-style Task Editor

Edit: Tablet Deployment Tasks   ❓ ✕

[Save] [Save & Close] [Cancel]

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Tablet Deployment Tasks

	Info	Outli...	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	

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Spreadsheet-Style Task Editor – Rolling Beta

September Release	October Release	Future Releases

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
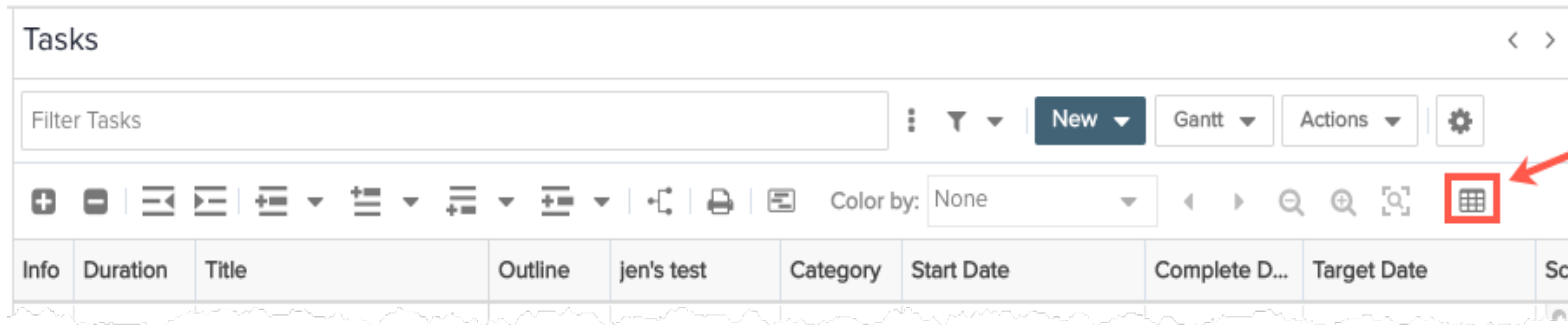
Future Releases

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

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Spreadsheet-Style Task Editor

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

Spreadsheet-style Task Editor

Edit: Tablet Deployment Tasks

Save | Save & Close | Cancel

Tablet Deployment Tasks

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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
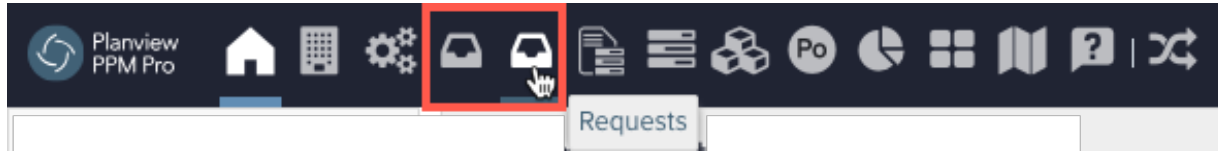
Request Revamp – Rolling Beta

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

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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

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Financial Entry Reports

- New Field
  - Actuals Amount (No Rollup)

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

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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

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Financial Entry Reports

Enhancements This Month

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

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Enhancements This Month

- Financial Attachments in Project/Attachments

Coming Soon

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

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Upcoming Webinars and Events

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

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Q&A

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