

What's New in Planview Portfolios - October 2023 Release



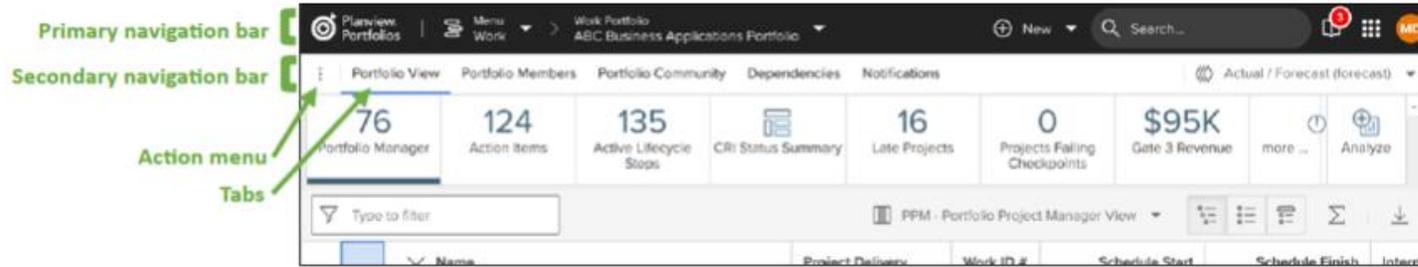
See the [Customer Success Center, Planview Portfolios Quick Reference: Updates to Menus and Navigation – October 2023](#), for Planview's notes regarding the October 2023 release changes

Note: *You may not see all the options presented in this document. Menu options and items you see depends on the role you hold in the CTP, Planview Portfolios.*

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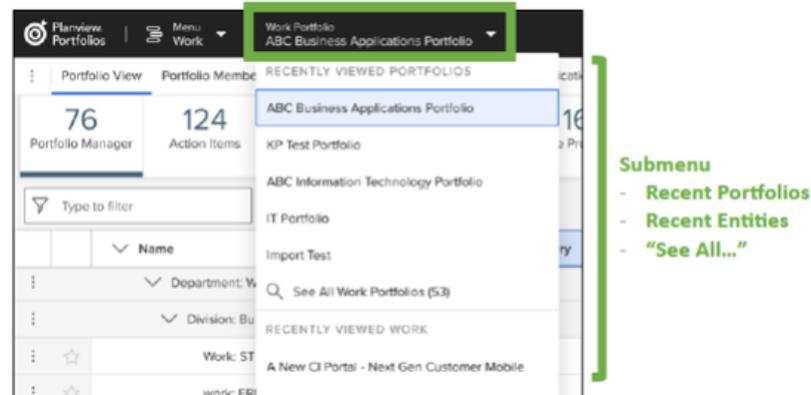
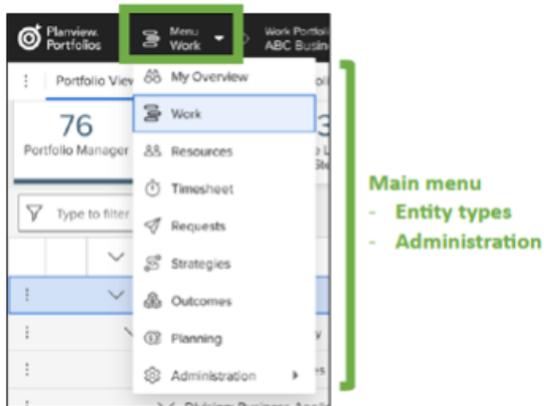
1. Navigation Bar Changes



Note: selected "tabs" have a blue underline

2. Menu Changes

- **Main Menu** contains **Entity types**. For Administrators, **Administration** menu can be accessed from here also.
 - **Entity types** = Work, Resources, Strategies, Requests, Outcomes, Planning, etc. (entities you can see depend on your configuration in the CTP, Planview Portfolios)
 - Time Reporters can also access their **Timesheets** from here.
- **Submenu** for each **Entity type** will list recently visited portfolios and items within the selected **Entity type**. There is also an option to "See All" (portfolios and items) within the selected Entity.

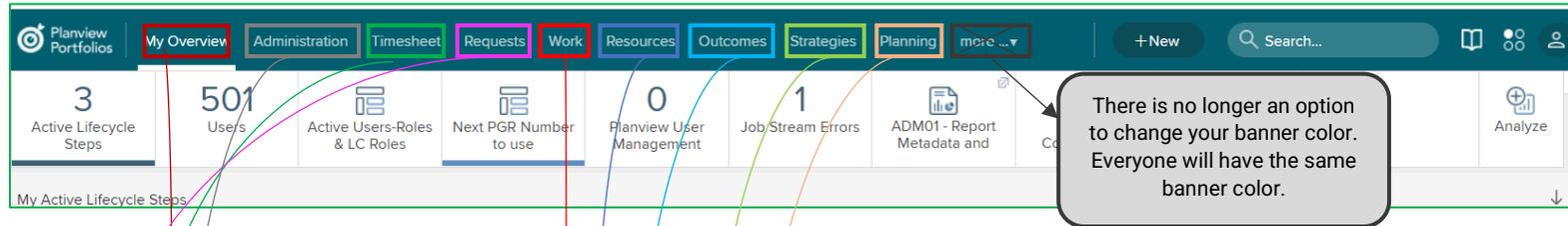


3. Menu and Navigation Changes

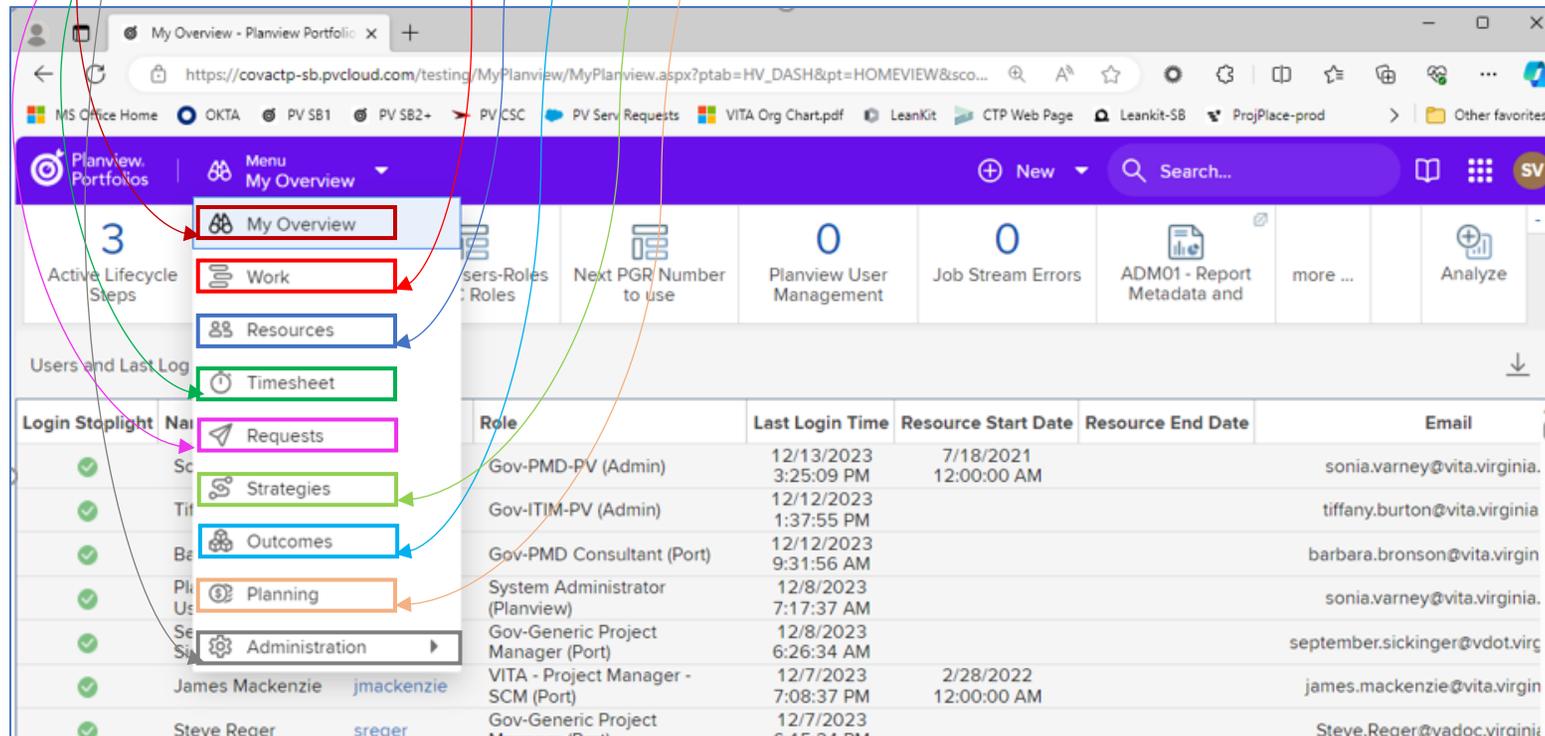
The main menu has changed from horizontal across the top of the screen, to selections from dropdowns:

Before

(Menu Items you see depend on the role you hold in the CTP, Planview Portfolios)



After

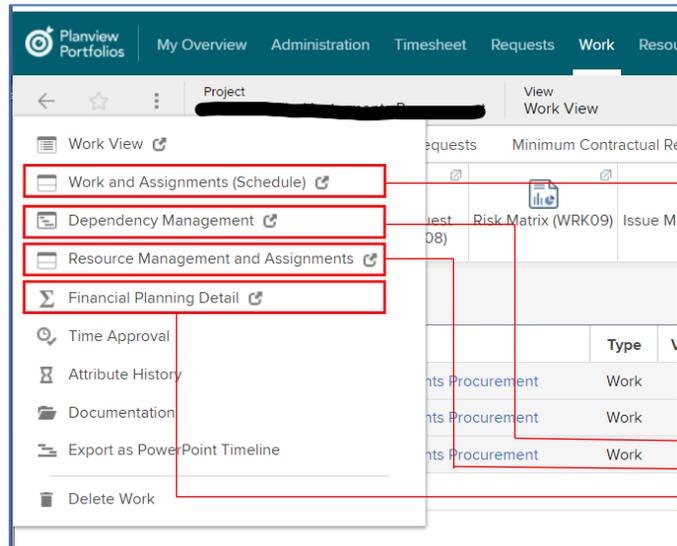


4. Work Default Screen Name Changes

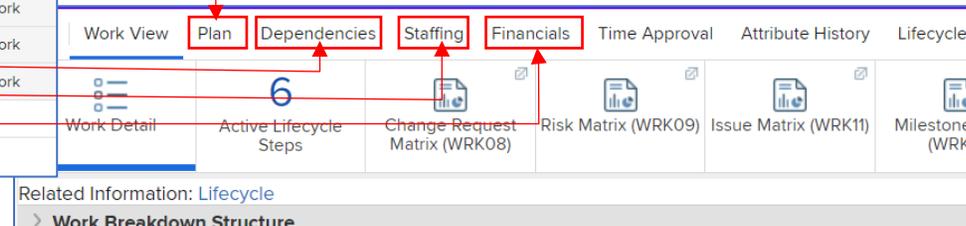
The default names for some primary work-related screens are being changed, and the screens are now listed across the top of the **Work** screen (like “tabs”) instead of being in the **Action Menu**:

- “Work and Assignments” changes to “**Plan**”
- “Dependency Management” changes to “**Dependencies**”
- “Resource Management and Assignments” changes to “**Staffing**”
- “Financial Planning Detail” changes to “**Financials**”

Before



After



5. Entity Menus Review

The **main menu** will now be used to select the **entity type** (Work, Strategies, etc.). Then the sub-menu will be used to select the individual entity item or a portfolio. The **+New** menu has been changed to include the ability to create new portfolios.

Using the **Work** entity as an example:

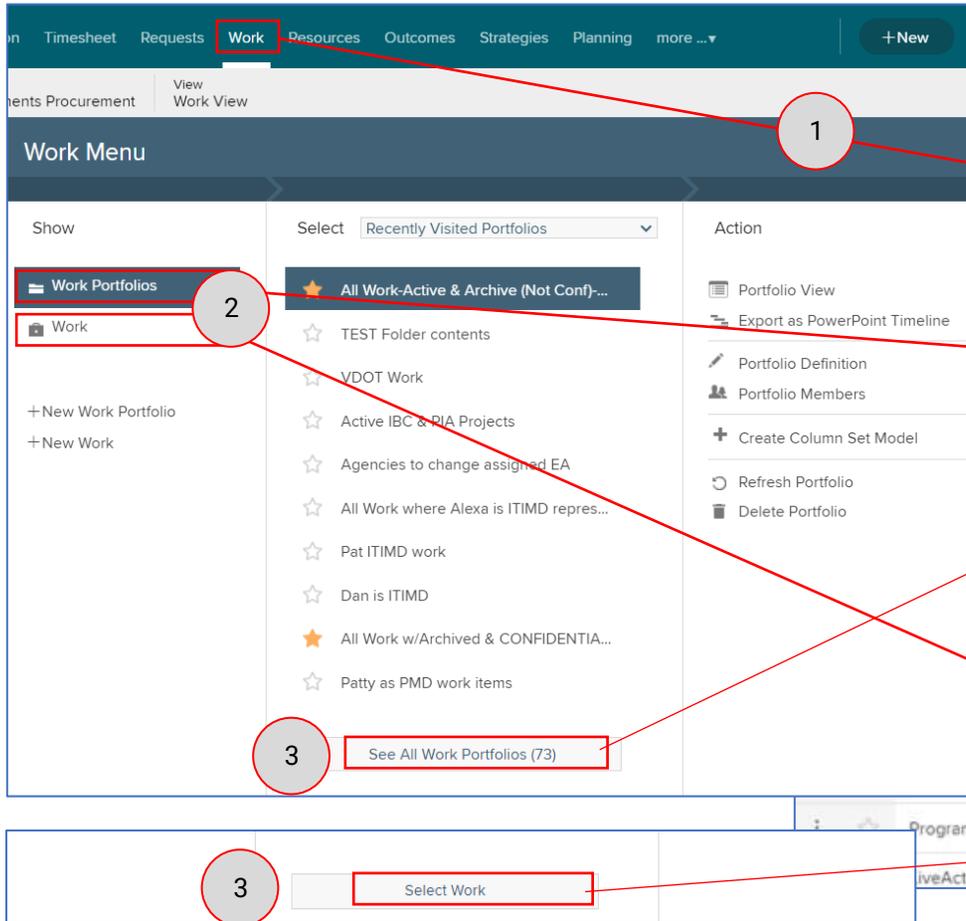
Before

1. We selected **Work** from the main menu, across the top of our screen to bring up the **Work Menu**.
2. Then we would select either **Work Portfolios** or **Work** to see a list of **Recently Viewed Work Portfolios** or **Recently Viewed Work** items.
3. We also had the option for viewing all under either option (portfolios/work).
4. We could also create new **Work Portfolios** or **Work** items from this screen using **+New Work Portfolio** and **+New Work**.

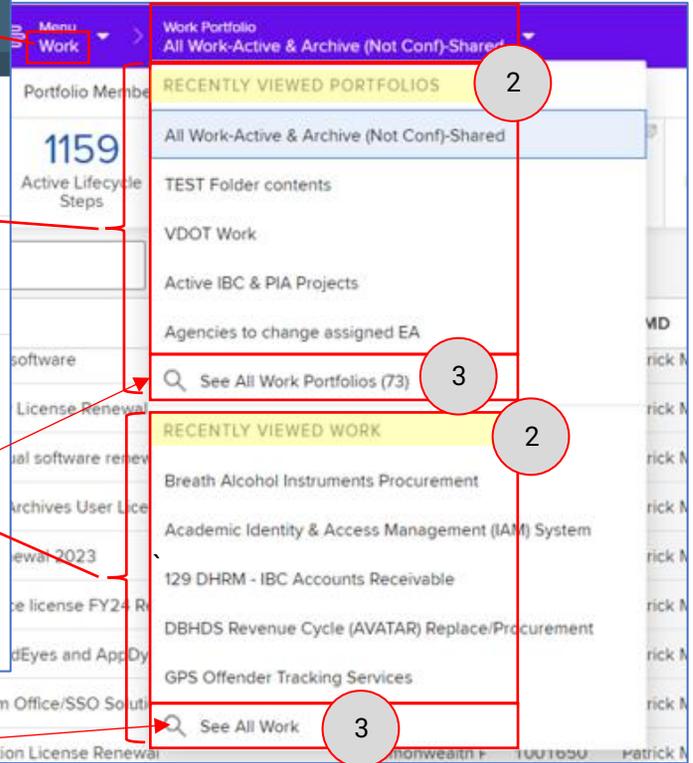
After

1. We will select **Work** to bring up the **Work Portfolio** sub-menu (the last visited Work Portfolio will be displayed).
2. We can click on the sub-menu to see a short list of Recently Viewed Work Portfolios or Recently Viewed Work items.
3. We still have the option for viewing **All** under either option (portfolios or work).
4. The option to create **+New Work Portfolio** and **+New Work** are now under the **+New** on the primary navigation bar.
 - a. **+New Work Portfolio** can also be found under **See All Work Portfolios**.

Before

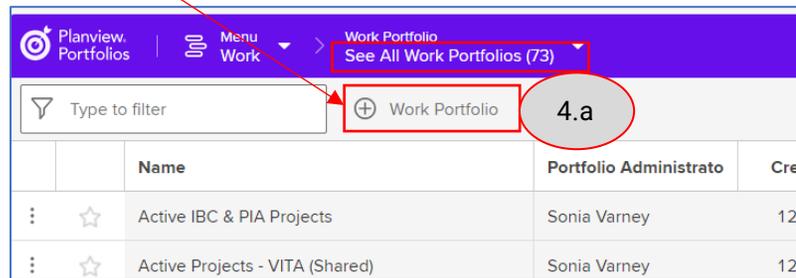
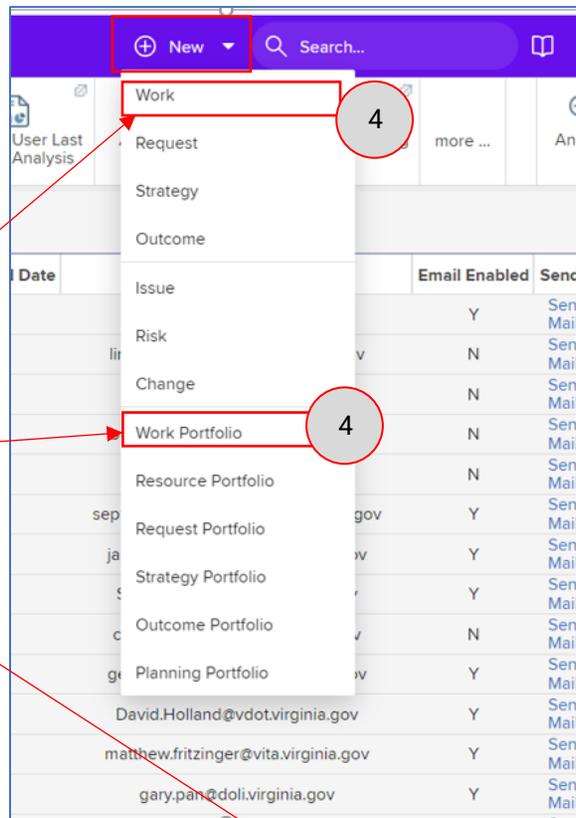
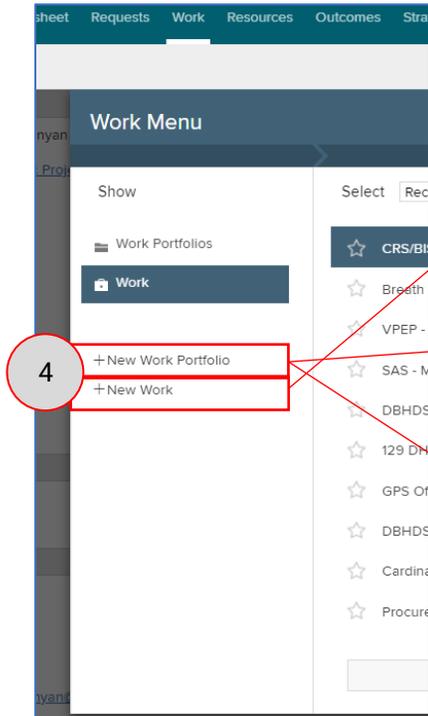


After



Before

After

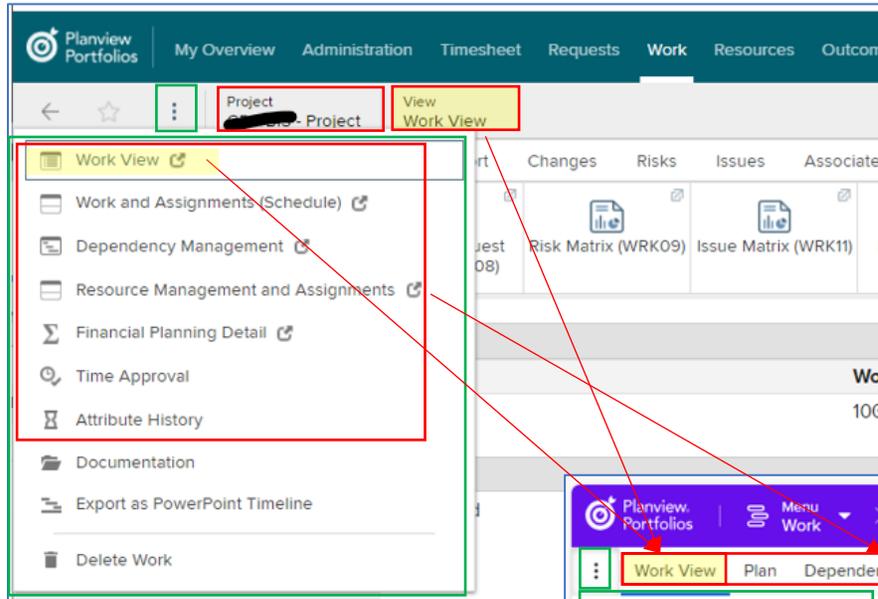


6. Navigation Bar comparison

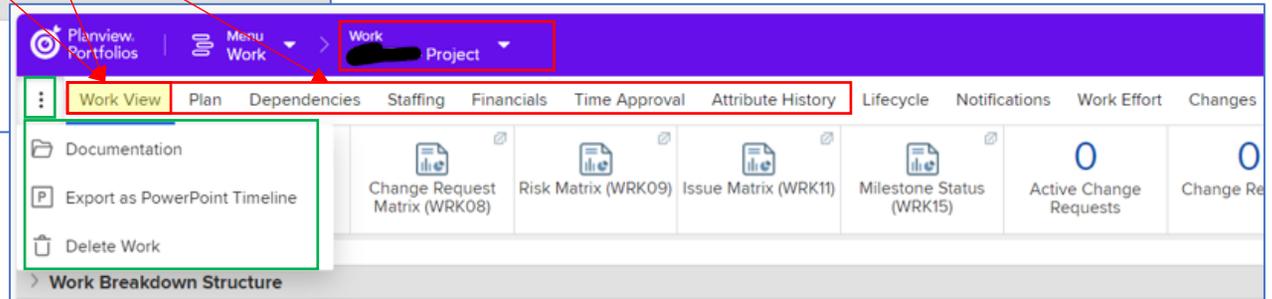
Green boxes show the action menus, before and after the upgrade to Oct 2023 release

Work

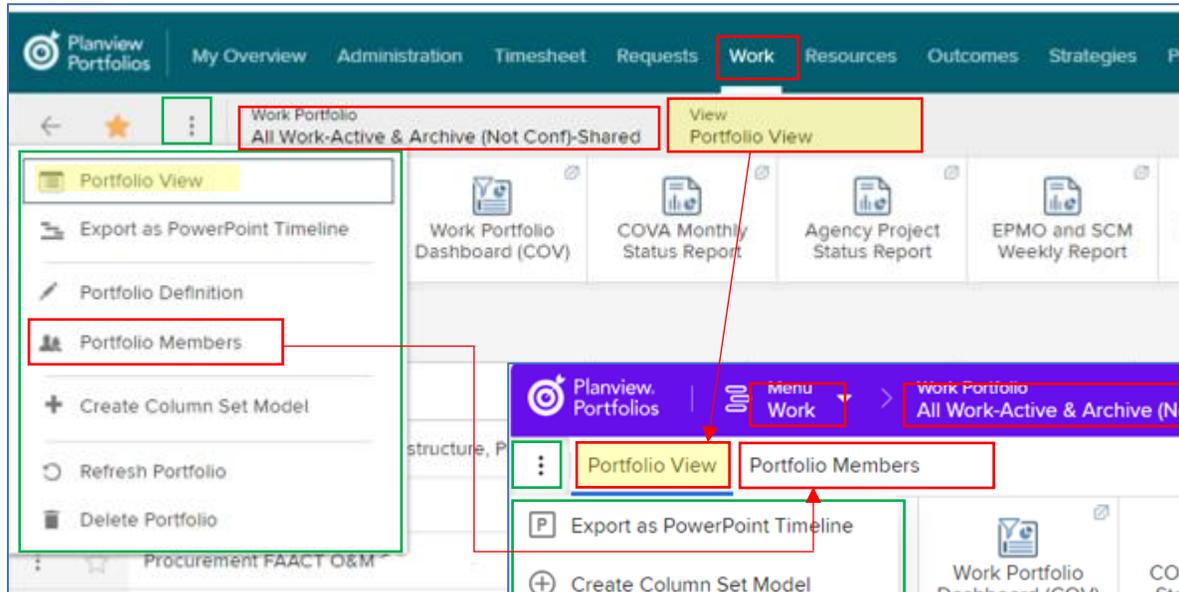
Before



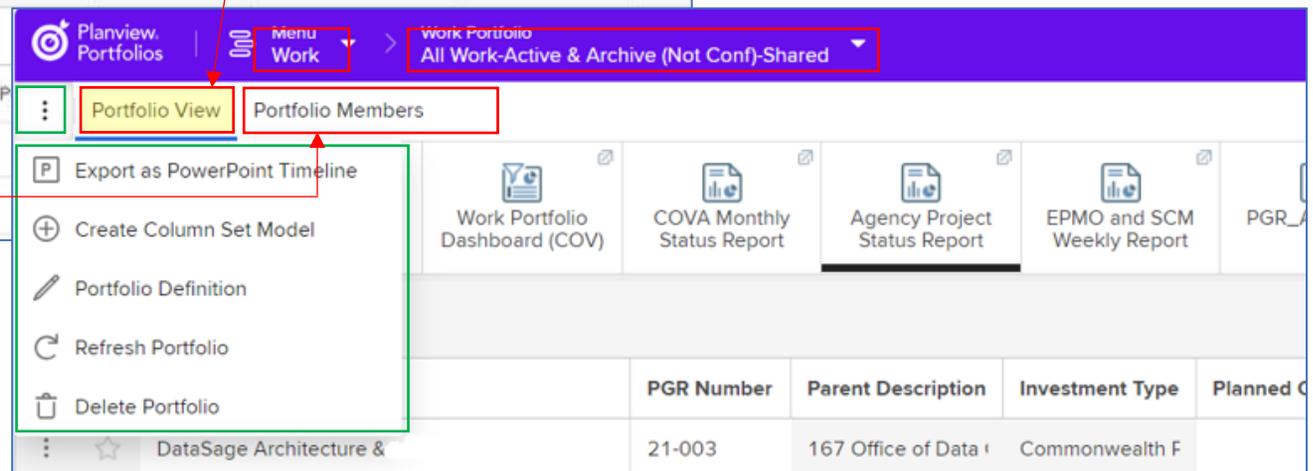
After



Before

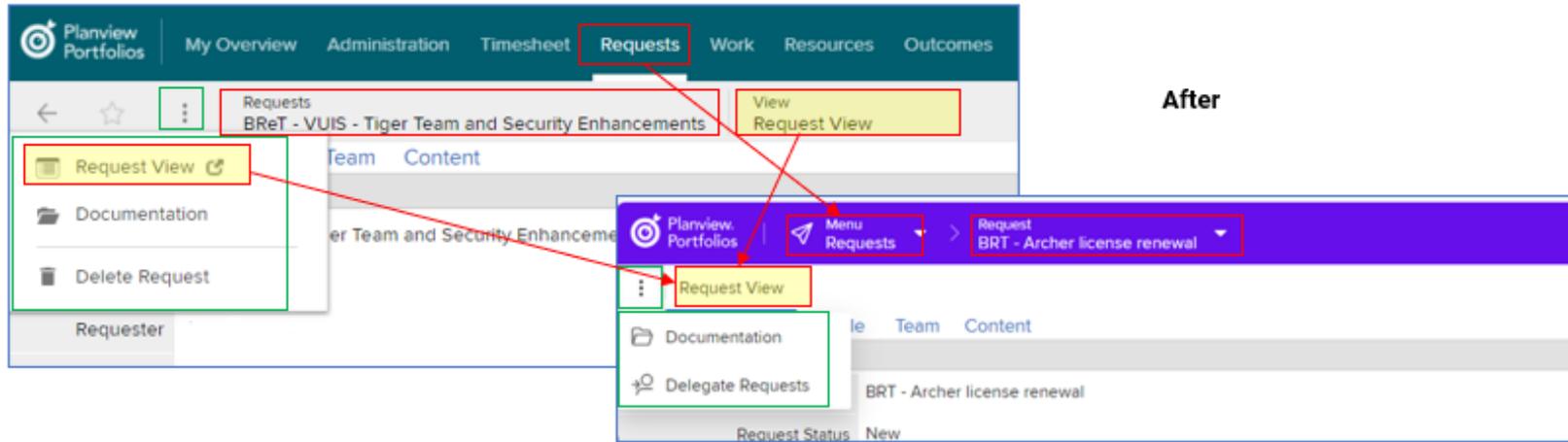


After



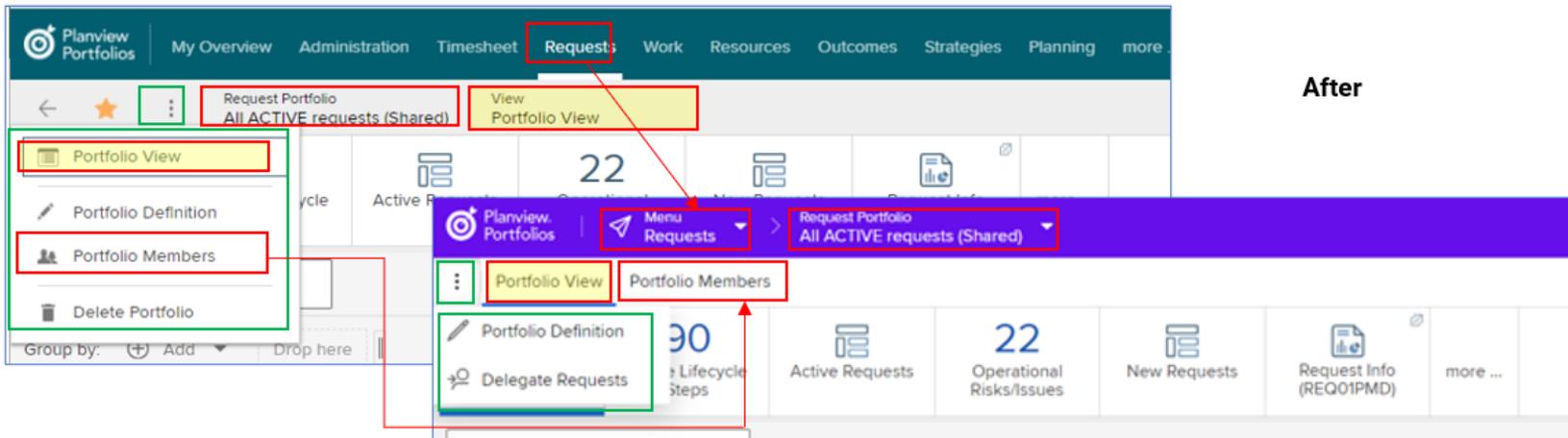
Requests

Before

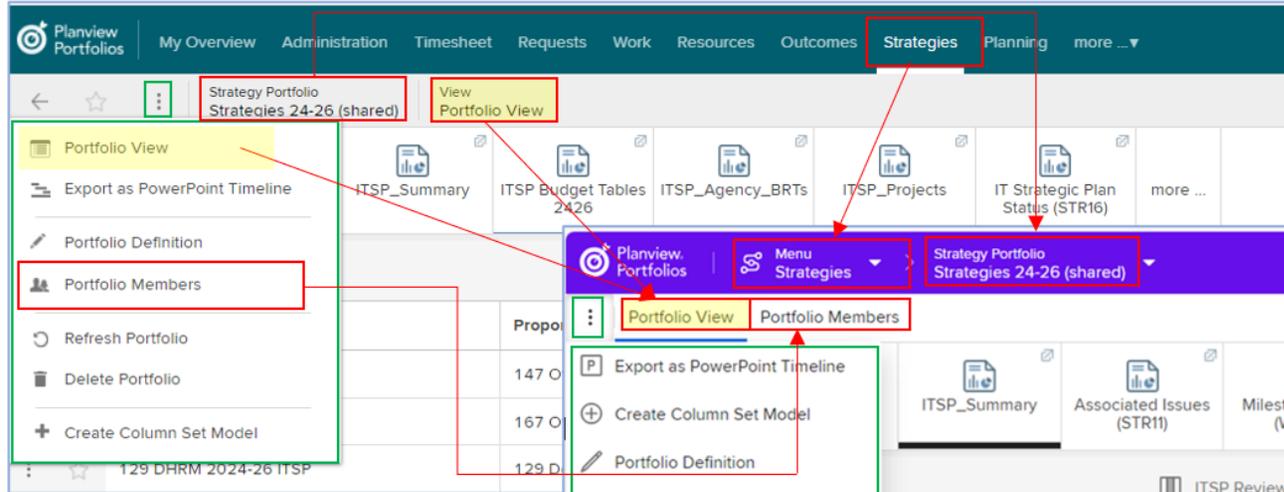


Requests Portfolio

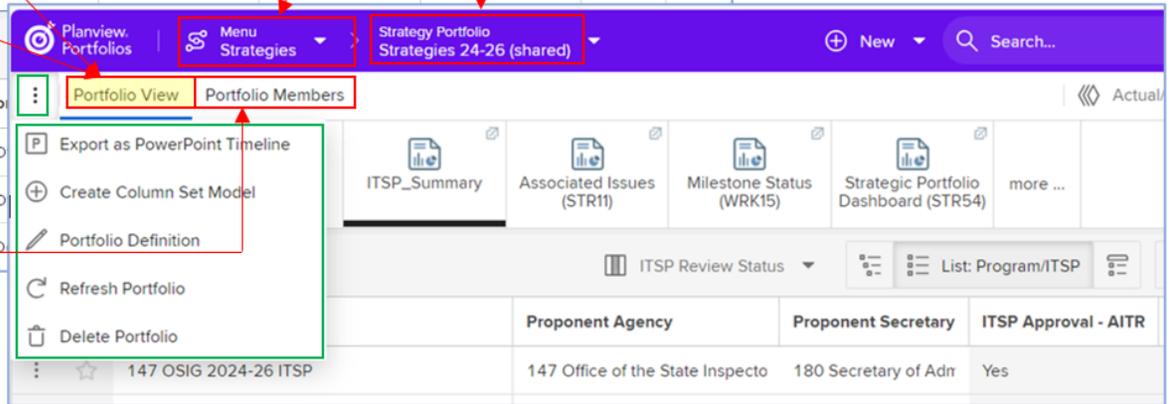
Before



Before

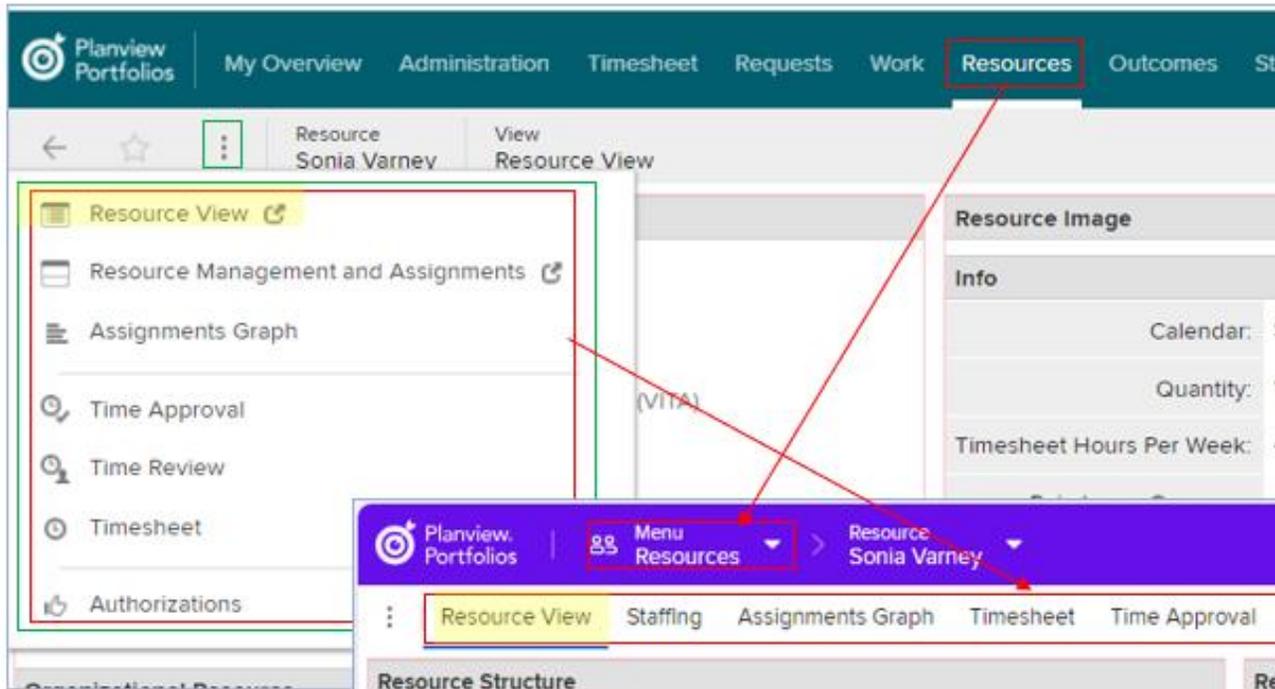


After

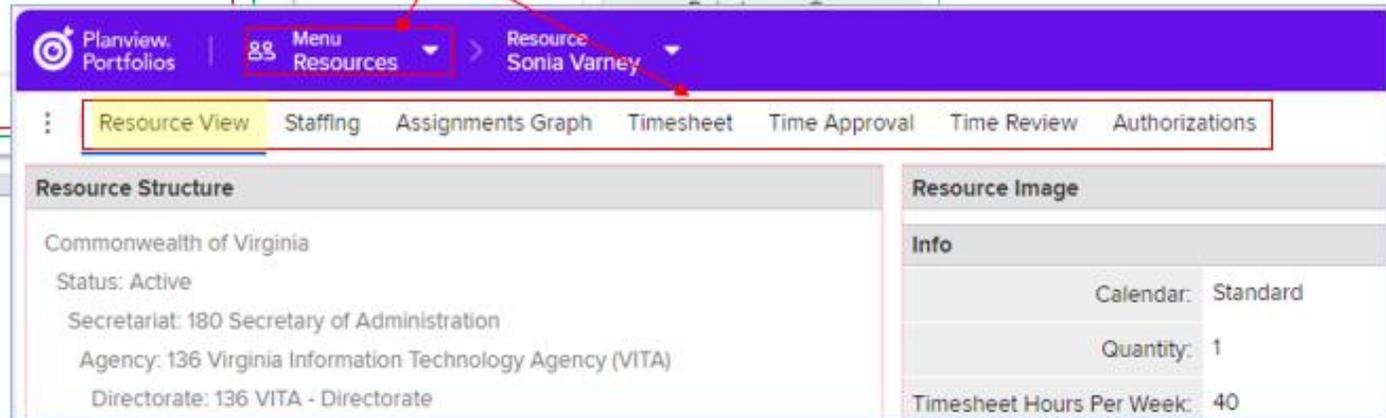


(Before) Resource Management and Assignments = (After) Staffing

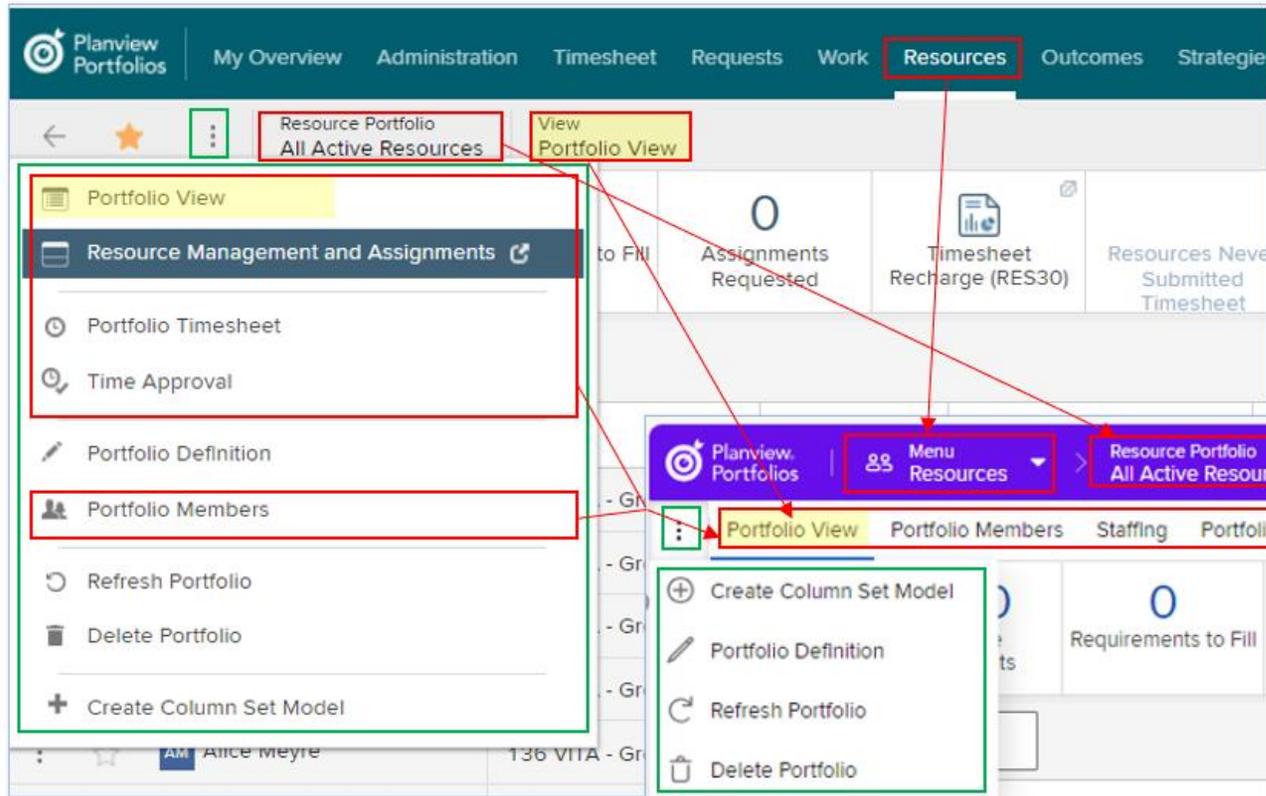
Before



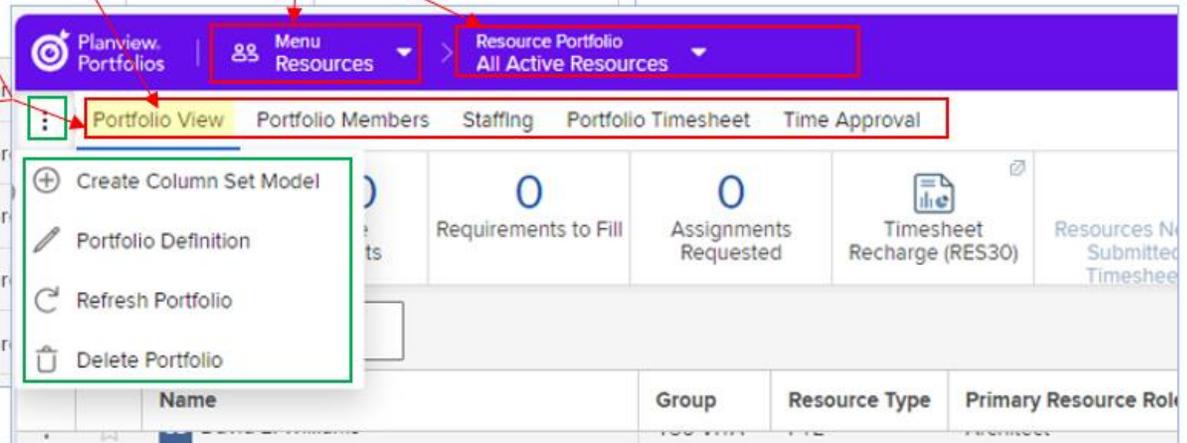
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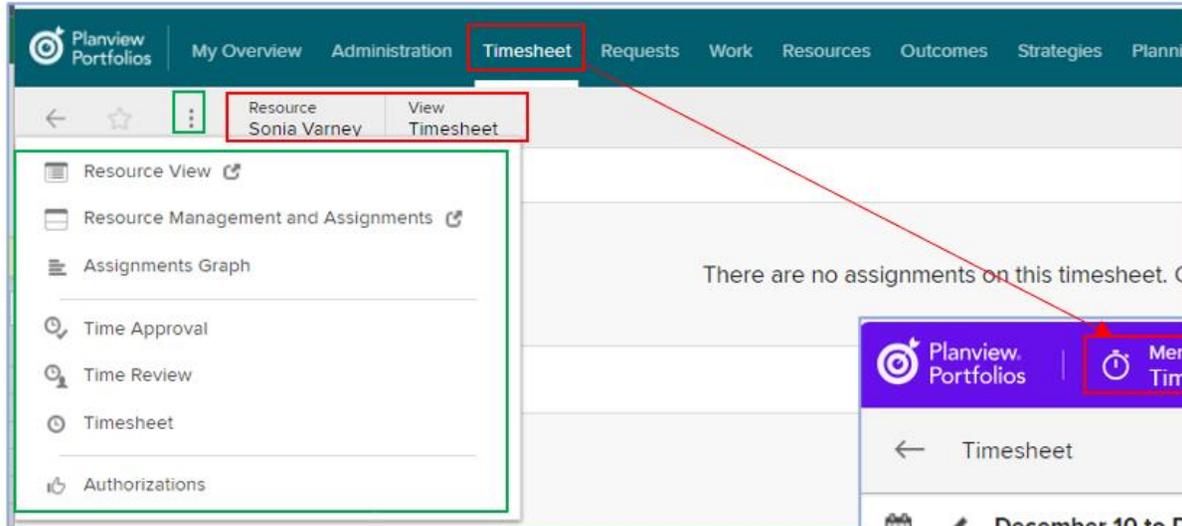
Before



After

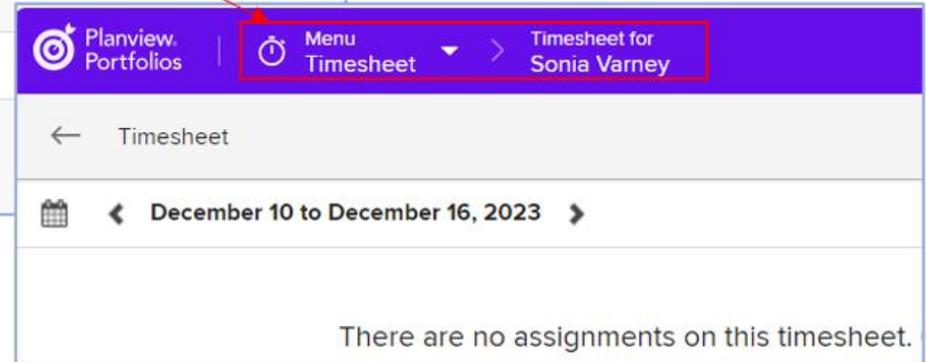


Before

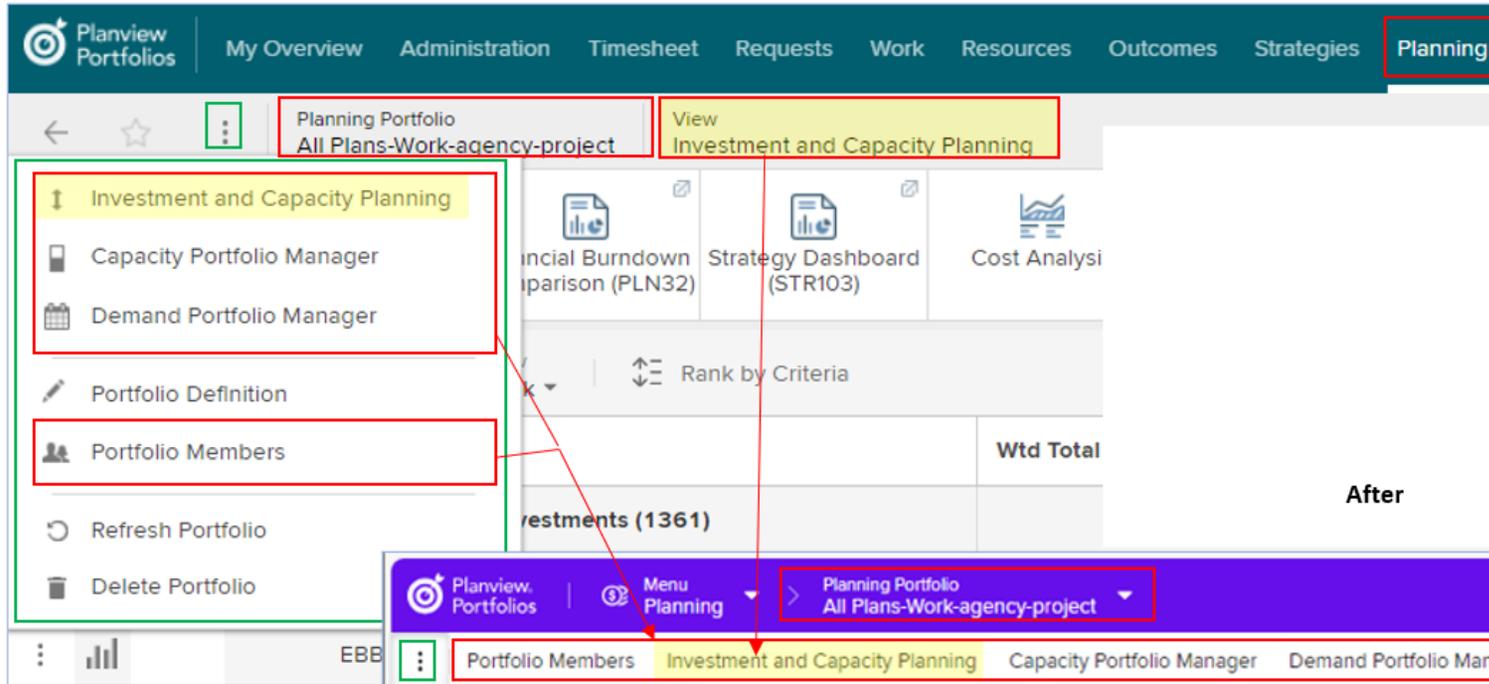


Notice that the Resource Action list has been removed from the Timesheet View.

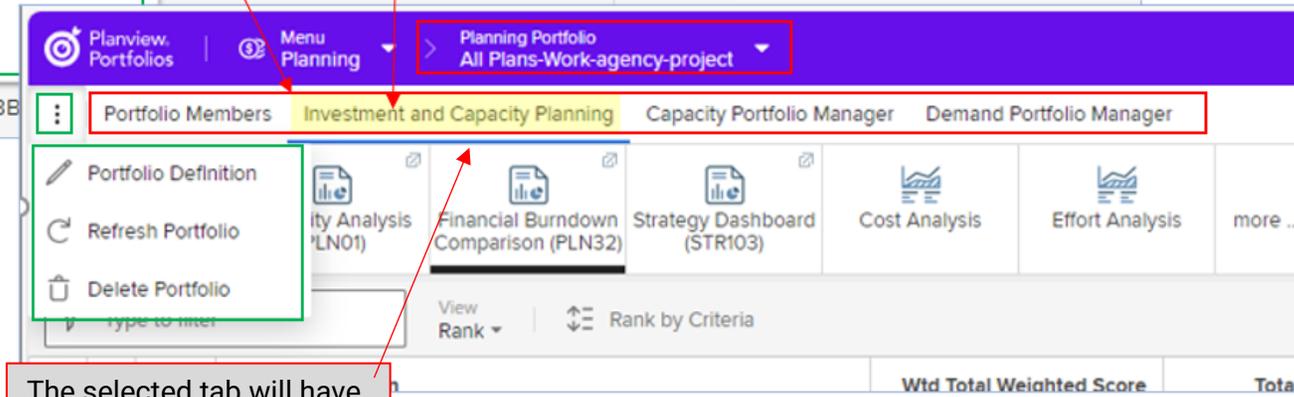
After



Before

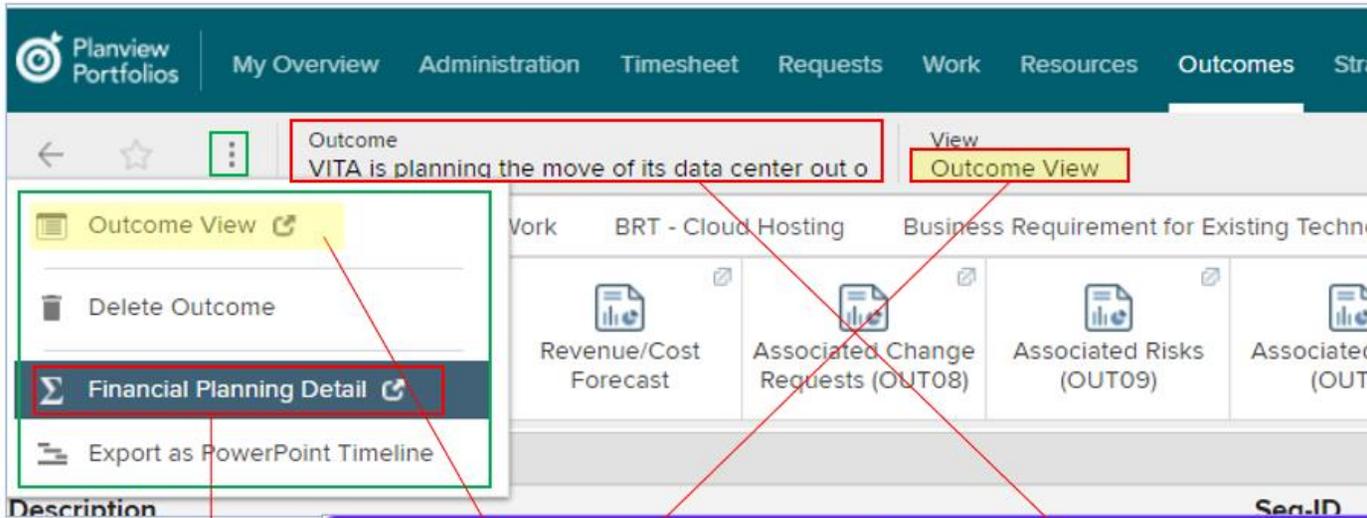


After

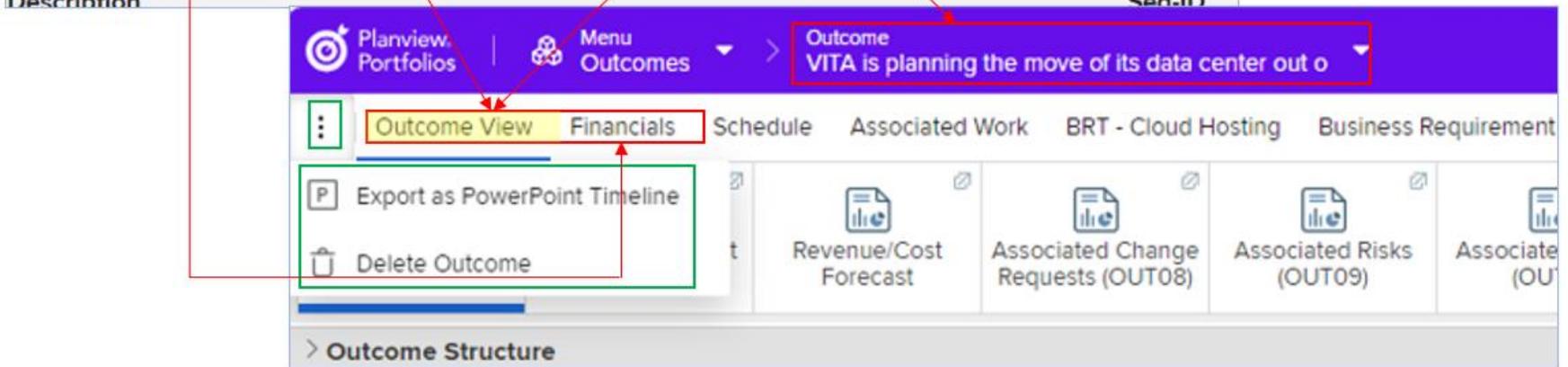


The selected tab will have a blue underline.

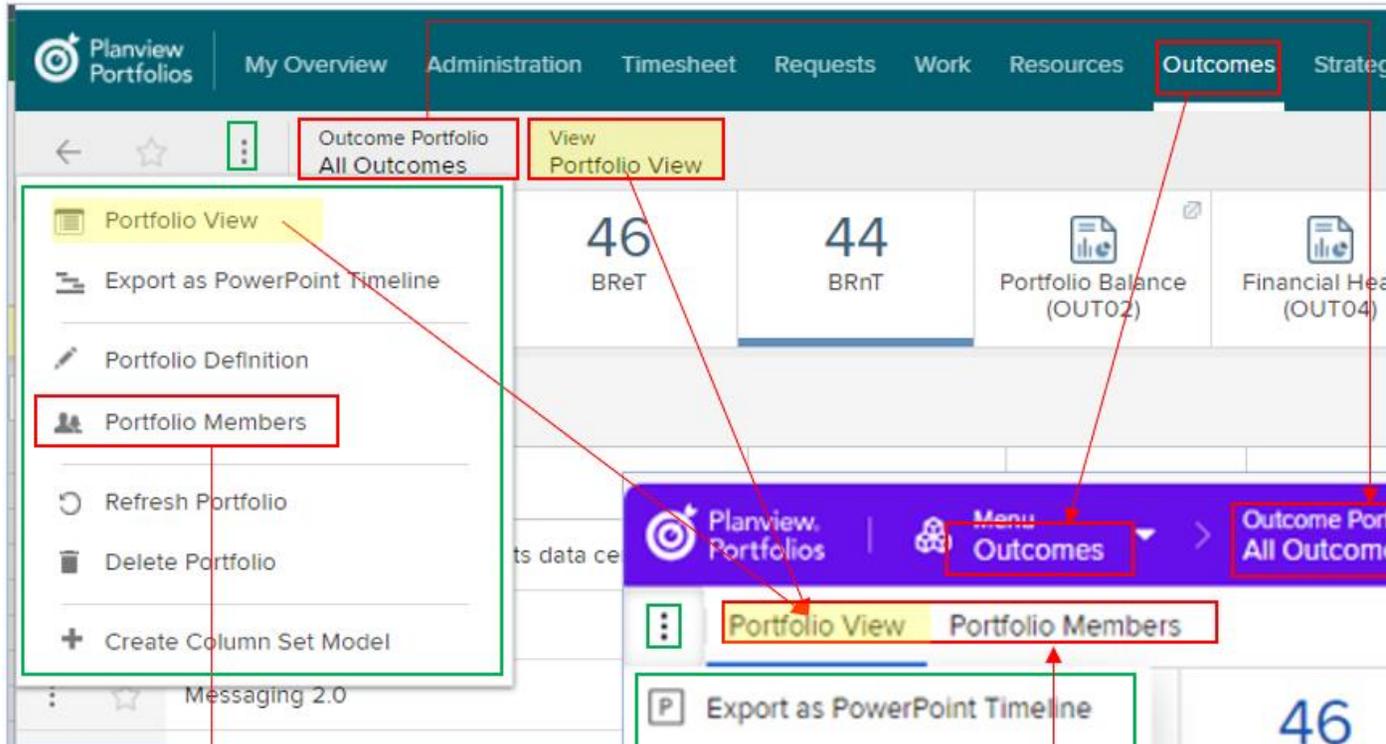
Before



After



Before



After

