

What's New in Planview Portfolios -

# **October 2023 Release**

See the <u>Customer Success Center</u>, <u>Planview Portfolios Quick Reference</u>: <u>Updates to Menus and Navigation – October 2023</u>, for Planview's notes regarding the October 2023 release changes</u>

**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)

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	Sc Sc	Gov-PMD-PV (Admin)	12/13/2023 3:25:09 PM	7/18/2021 12:00:00 AM		sonia.varney@vita.virginia.
	S Strategies	Gov-ITIM-PV (Admin)	12/12/2023 1:37:55 PM	12.001007411		tiffany.burton@vita.virginia
	Be Be Outcomes	Gov-PMD Consultant (Port)	12/12/2023 9:31:56 AM			barbara.bronson@vita.virgin
	Pla SP Planning	System Administrator (Planview)	12/8/2023 7:17:37 AM			sonia.varney@vita.virginia.
	Se Si Si Administration	Gov-Generic Project Manager (Port)	12/8/2023 6:26:34 AM			september.sickinger@vdot.virg
	James Mackenzie jmackenzie	VITA - Project Manager - SCM (Port)	12/7/2023 7:08:37 PM	2/28/2022 12:00:00 AM		james.mackenzie@vita.virgin
	Steve Reger sreger	Gov-Generic Project	12/7/2023			Steve.Reger@vadoc.virginia

# 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"

Planview My Overview Administration	Timesheet Requests Work Reso			
← ☆ : Project	View Work View			
🔳 Work View 🕑	equests Minimum Contractual R	ŧ		
Work and Assignments (Schedule) ♂         □         □       Dependency Management ♂         □       Resource Management and Assignments ♂         □       Financial Planning Detail ♂         ○       Time Approval	Inest     Risk Matrix (WRK09)     Issue M       D8)     Type     N			After
<ul> <li>Attribute History</li> <li>Documentation</li> </ul>	nts Procurement Work	Work View Pl	an Dependencie:	s Staffing Financials Time Approval Attribute History Lifecycle
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## 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



Before

After

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:	\$	Active Projects - VITA (Shared)	Sonia Varney	12/			

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## 6. Navigation Bar comparison

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

## Work



## Work Portfolio



### Requests

#### Before

![](_page_9_Picture_2.jpeg)

## **Requests Portfolio**

![](_page_9_Picture_5.jpeg)

## Strategies

![](_page_10_Picture_2.jpeg)

## Strategies Portfolio

![](_page_11_Figure_2.jpeg)

#### Resources

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

![](_page_12_Figure_3.jpeg)

## Resources Portfolio

Planview Portfolios My Overview Administration Time	esheet Requests Work Resourc	es Outcomes Strategie:			
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<ul> <li>Portfolio Timesheet</li> <li>Time Approval</li> </ul>	Requested	Timesheet	Aft	er	
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<ul> <li>Refresh Portfolio</li> <li>Delete Portfolio</li> </ul>	- Gr - Gr - Gr Portfolio Definition	) O Requirements to Fill	O Assignments Requested	Timeshee Recharge (RE	Resources N     Submittee     Timeshee
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## Timesheet

![](_page_14_Picture_2.jpeg)

# Planning Portfolio

Planview Portfolios	My Overview	Administration	Timesheet R	equests Work	Resources	Outcomes	Strategies	Planning	
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### Outcomes

![](_page_16_Figure_2.jpeg)

## Outcomes Portfolio

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Portfolio Definition     Portfolio Members		(00)		After
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	Create C     Portfolio	Column Set Model	BKel	BKNI PO
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