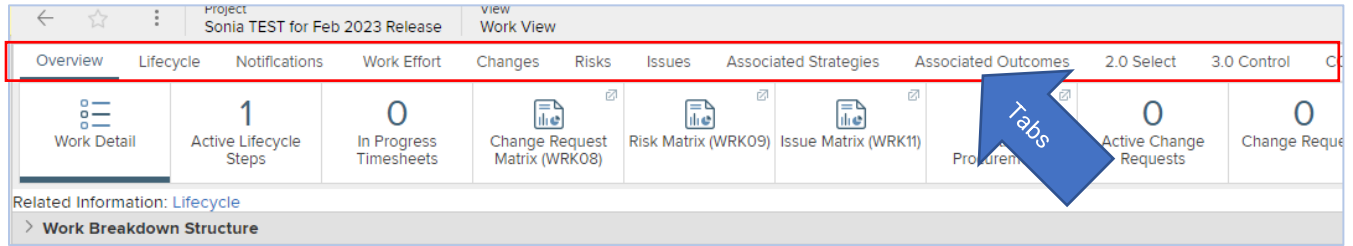**What's New in Planview Portfolios – May 2023 Release?**

## 1. New warning message when leaving an enhanced configured screen when there are unsaved changes.

TIP: Enhanced configured screens have the green shaded headers.

This pertains to when you move from one "tab" to another "tab". "Tabs" are the menu above the ribbon.
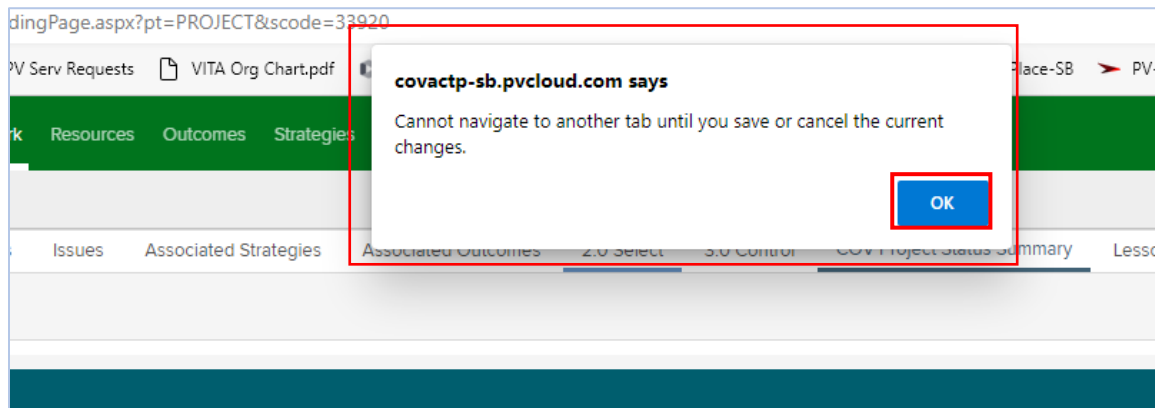

Example:

Within a Commonwealth Investment (Project) you open the **COV Project Status Summary** and update the **Reporting Period.**
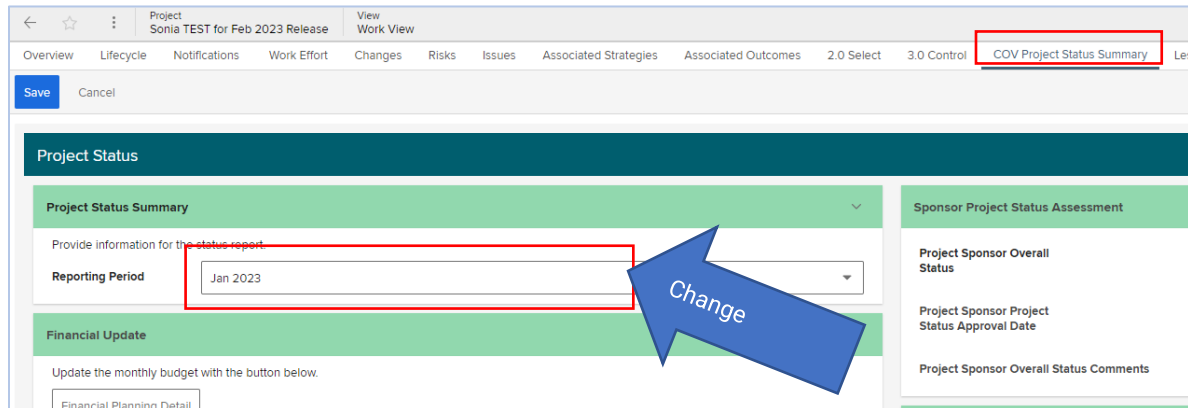
Without saving this screen, click on another tab. Warning message is displayed.

To remove the warning message, click on **OK**.

Then either save or cancel the changes made to the original screen.

2. New warning message when updating **Actual Finish Date**.

Warning message informs user about assignment expirations resulting from updating the Actual Finish Date.

When making any of the following changes to a task in a project schedule

- Changing **Work Status** to **Completed**
- Adding an **Actual Finish Date**
- Updating **Percent Complete** to **100%**

a warning message will be displayed to let the user know that assignments will expire as a result. What this means, is that the resources assigned to the task will be no longer be needed, so their pending effort is removed (they disappear from the schedule, but any effort applied in the past will still be available through time reports).

Example:
Schedule and Assignments view before:

Change **Percent Complete** on **test task 1** to **100%** complete.

Message is displayed:

Click **OK**.

Schedule and Assignments view after – note resource names disappear from **test task 1**:

3. Bulk Editing

For tips on how to use, please see the CTP job aid: Bulk Editing – How to edit a Field's Value on Multiple Rows at One Time

Also see Planview Portfolios Tips & Tricks video, **Table and Grid Enhancements** (this feature is about halfway through the video).

The field must be included in the column set and must be editable in order to update.

- The Bulk Editing feature has been extended to the following screens.
    - Resource Management and Assignments
    - Work and Assignments (Schedule)
    - Financial Planning Detail
    - Work Portfolio view

Bulk Edit Example: Work Portfolio View

In this example the field/column **Reporting Period** will be cleared out where **Reporting Period** has a **Mar 2022** value.
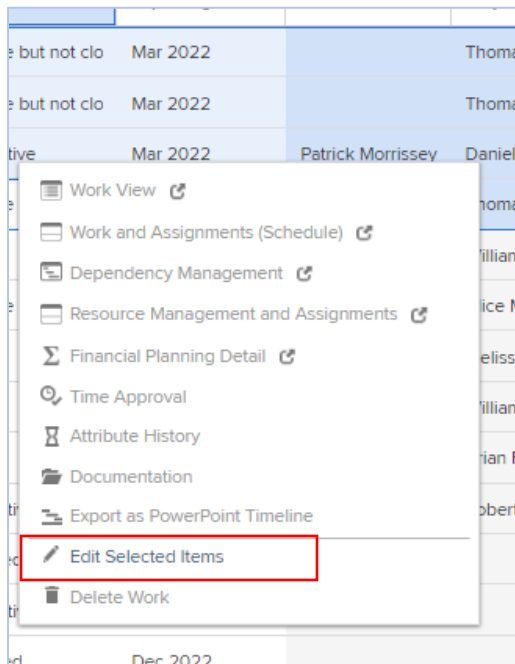
1. From any **Work Portfolio View**, with a column set that contains the field to be updated, select all rows to be updated.
   *For this example, I have created a Work Portfolio showing only projects that are editable (not completed, Canceled, or Denied) and have a **Reporting Period** of a 2022 date. I also have created myself a column set that included **Reporting Period** as one of the columns.). For help creating a portfolio, see the Job Aid* How to Create a New Portfolio
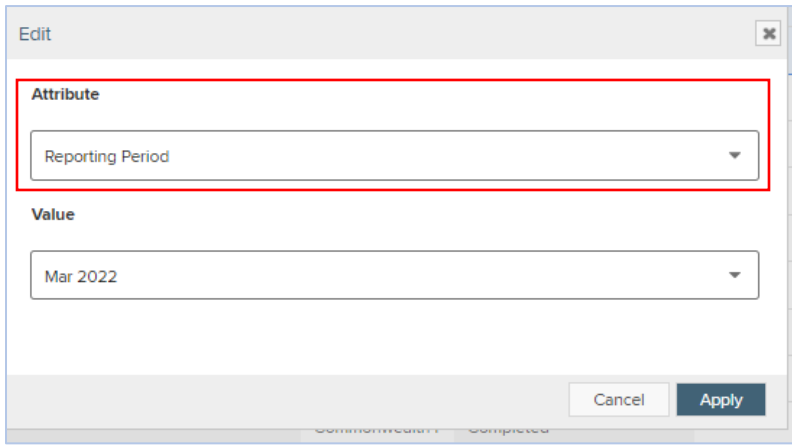
	Wor	Work Status	Reporting Peri↓	PMD Consultant	Proje
t Apptio	EPN	Complete but not clo	Mar 2022		Thom
	EPN	Complete but not clo	Mar 2022		Thom
ram (DCRP)	10C	Open/Active	Mar 2022	Patrick Morrissey	Danie
	10C	Complete but not clo	Mar 2022		Thom
nal System	EPN	On Hold	Apr 2022		Williar
Transformation	EPN	Complete but not clo	Jun 2022		Alice

   Tip: *Select rows much like when in Excel - select top row, use shift key and select bottom row or select one row, use Ctrl key and select each of the other rows.*

2. Right click anywhere in one of the selected rows to bring up the action menu, and select **Edit Selected Items**
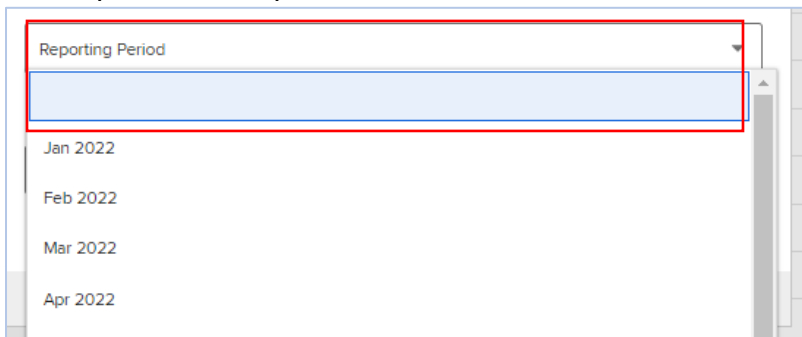
e but not clo	Mar 2022		Thoma
e but not clo	Mar 2022		Thoma
tive	Mar 2022	Patrick Morrissey	Daniel

- 📋 Work View ⌃
- ▦ Work and Assignments (Schedule) ⌃
- 🔲 Dependency Management ⌃
- ▦ Resource Management and Assignments ⌃
- Σ Financial Planning Detail ⌃
- ⊙, Time Approval
- ⧗ Attribute History
- 📁 Documentation
- ⇥ Export as PowerPoint Timeline
- ✏ Edit Selected Items
- 🗑 Delete Work

3. In the **Attribute** box, select the field to be updated.
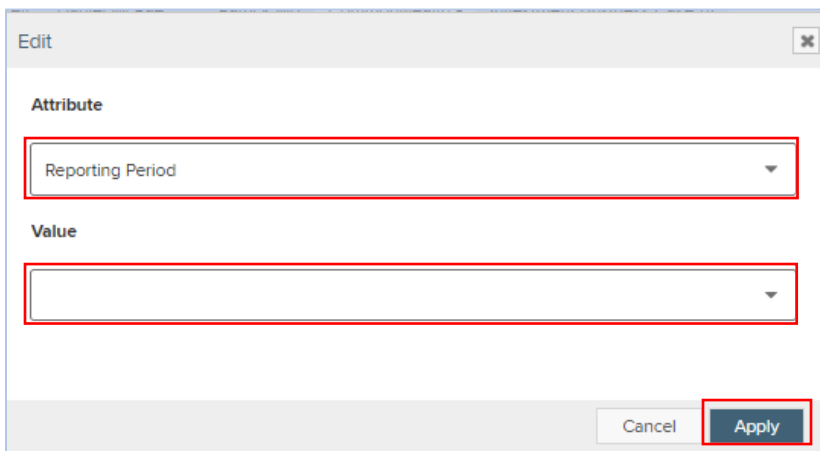   In this example, we are selecting **Reporting Period**.

4. In the **Value** box, select the value you want to place in the field for the selected items. In this example, we want to clear out the Reporting Period for the select projects, so we select the blank space at the top of the list of values:
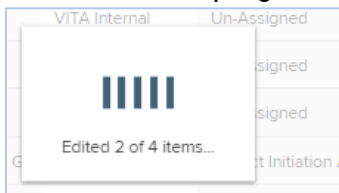

5. After making all the selections, review your choices. If it all looks correct, click on the **Apply** button:


6. You will see the progress as Planview updates the items:

7. Notice the field in the selected rows have all been updated (to blank):

	Wo	Work Status	Reporting Peri↓	PMD Consultant	Project M
ᴐ	EPN	Complete but not clo			Thomas K
	EPN	Complete but not clo			Thomas K
CRP)	10C	Open/Active		Patrick Morrissey	Daniel Mc
	10C	Complete but not clo			Thomas K
tem	EPN	On Hold	Apr 2022		William H
mation	EPN	Complete but not clo	Jun 2022		Alice Mey
project	10C	On Hold	Jun 2022		Melissa N

4. Financial Planning Detail – Edit with Formula Functions

You may notice a new feature Planview is introducing, **Edit with Formula Functions** option. This feature allows use of a "financial calculator" on monthly period columns to make calculated changes across a series of columns in a single row. The feature is described below, as an FYI ONLY. **Please do not use this feature**. If you have any questions, please contact your ITIMD or PMD consultant.

So that you are aware of what this looks like, so you do NOT accidentally use it, it is found on the **Financial Planning Detail** screen, and is a calculator:
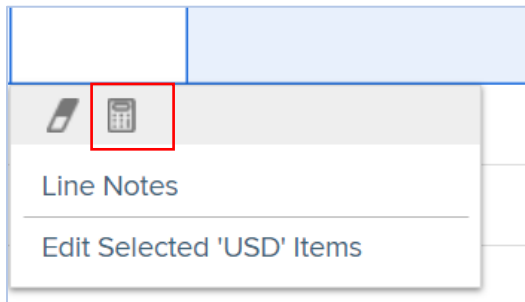
For more Financial Formula Functions information
For more detailed information, see the **Planview Customer Success Center**:

- [Financial Planning Detail Screen Basics](#) – **Using Formula Functions** section for more detail and examples
- [Planview Portfolios Tips & Tricks](#) page see **Formula Calculator – Financial Planning Detail** video

# 5. Leave a Portfolio that has been shared with you

When invited to a shared portfolio, you no longer need the owner (or an administrator) to remove you from the portfolio.

Note: if you leave a portfolio, you will need to be re-invited to access it again.

Example
In this example, user "test project manager" will leave the Active work with 2022 Reporting Period portfolio.

1. Navigate to the **Portfolio Members** screen of the portfolio you want to leave:
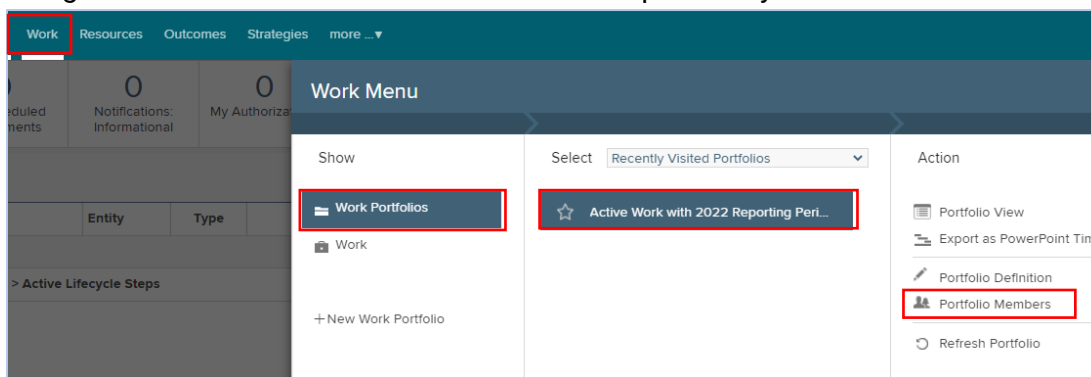

2. From the **Portfolio Member** screen, click on the **(Leave Portfolio)** link (you will only see the link for yourself, although you can see everyone that is a member of the portfolio):
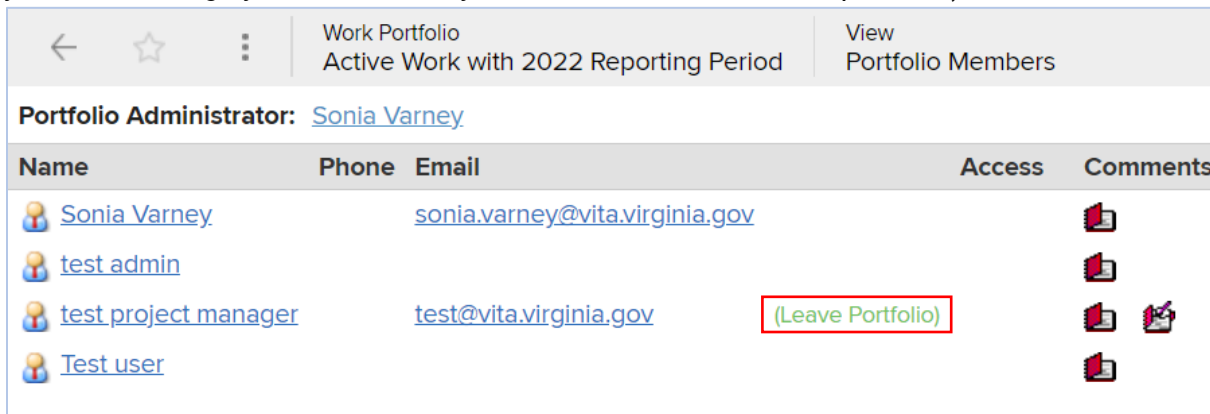
3. Planview will give you a warning to remind you that you will have to have the portfolio's owner/administrator to add you back if you want to rejoin the portfolio. If you are sure you want to leave, click on the **OK** button:
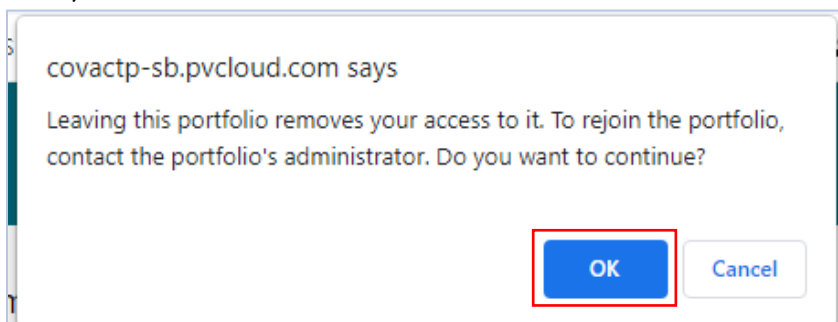
4. Planview will return you to your **My Overview** screen.
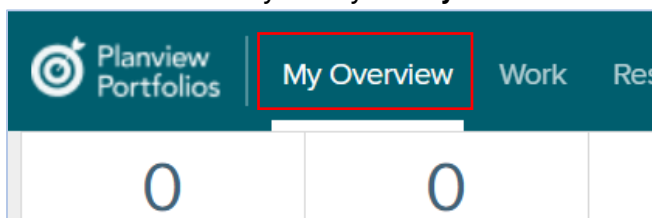
6. If a desired filter is not available when building a new portfolio:

With the May 2023 release, Planview will clean up the list of attributes available for filtering when building a portfolio. Any attributes not being used to build any portfolios will no longer automatically be included in the filter list.

This list can be found when building a new portfolio, under the **Advanced Options**, **Click option attribute categories you wan portfolio to include.** See image below showing the filter.

If you want to filter on an attribute/field that is not in the list, please notify the CTP Administrators requesting they include it in the Portfolio Definition.

7. Long Text Fields in a table/columnset view.

Long text fields, like comments, will no longer be editable in a column set/table view when there are more than 2000 characters.   These fields can still be edited within a configured screen.

Example below is in a Work Portfolio column set:

		Name	CIO Comments	Comments	CIO Overall Status Comments
⋮	☆	Sonias SAMPLE Commonwealth Project - M			
⋮	☆	Sonia TEST Project - May 22-Restarted Jun			
⋮	☆	Sonia SAMPLE Commonwealth Project - Ma			
⋮	★	Commonwealth Project 1 - June 6			
⋮	★	TEST Commonwealth Project 2 - May 25th			

Test showing over 2000 characters.
100-
12345678901234567890123456789012345678901234E

This text exceeds 2000 characters and cannot be edited in this table screen. To edit this text, access the attribute via the item's edit screen.

↗ | Cancel   Done