What's New in Planview Portfolios – November 2022 Release?

VITA is planning to upgrade from the October 2022 release to the November 2022 release effective December 19th, 2022.

1. New Feature: Bulk Editing

Planview is introducing **Bulk editing** with the November 2022 release. **Bulk editing** allows the user to update the value of a single field, on multiple rows, at one time.

- **Bulk editing** feature is available on the following screens with the November 2022 release:
  - **Work View** screen:
    - **Changes** tab
    - **Risks** tab
    - **Issues** tab
    - **Action Items** tile
  - **My Overview** menu option:
    - **My Action Items** tile
  - **CRI Summary** screens

How to perform bulk update:

1. On one of screens mentioned above, select one or multiple rows to update.
2. Click on the "kabob" (⋮) to the left of one of the selected rows, or right click on one of the selected rows and select **Edit Selected Items**
3. Click on the **Attribute** list, then click on the name of the attribute/field you want to update. (Not all attributes are available to be edited.)
4. Click the **Value** list and enter the value you want to use. Depending on the type of attribute you selected, you may have a data picker, calendar, or may need to type a value.
5. Click **Apply** to update the attribute in all the rows you selected.

You can see Planview's notes on this topic under Updating a Single Attribute's Value on Multiple Rows in the Customer Success Center.

Example of a bulk update to Changes on a Commonwealth Project:

In this example the **Change Methodology** column for all 3 Changes will be changed from the original value to a new value of "New Test Methodology":

1. From the list of Changes on the test project, select all three changes.
   a. Press the <Ctrl> key and select individual lines (or click anywhere on the first line to be changed then press the <Shift> key and click on the last line to be changed).

2. Click on the kabob (or right click in the selected area), select **Edit Selected Items**

Note the current values in the Change Methodology column on each of the lines in the example.

3. From the **Edit** list, find and select the field/**attribute** you want to change. For this example, I will select **Change Methodology**:

4. Type the new value in the **Value** box and click on the **Apply** button.

5. Notice that all values under **Change Methodology** have been updated to "New Test Methodology"

New values in the Change Methodology column.

2. User Interface visual changes

Font size increased to 13 px.

Not especially noticeable on Portfolio views, but a difference can be seen on some other screens. I can see the difference on tile names and on Active Lifecycle Steps views.

Oct 2022 **Tile names** & **Entity view** tabs: **Tile names** & **Entity View Tabs** After Nov 2022 Upgrade:

Both screens are at 100% zoom.

When selecting a cell, that cell's column heading is highlighted.

In the example below, I clicked in the **Work Status** on the second row. Notice the **Work Status** column heading is shaded.

3. Update to Lifecycle Email Notifications

Emails generated from lifecycle approval notifications will

1. Have a clearer subject line.
   a. Current notification subject line (includes action needed and lifecycle step name):
      A Work Lifecycle Item requires your attention - Planview Portfolios Enter AITR - PGR Recommendation
   b. New notification subject line (includes entity type and item name):
      Work: Sonia - TEST Procurement - NOV 22 Release requires your attention
2. One button to take the user to the step that needs action
3. There will still be links to:
   a. The step that needs action (use the single button, or use the Lifecycle Item link)
   b. Work details
   c. Lifecycle Diagram
4. Only one .bin attachment (instead of two)
5. Greeting (date, "Dear", and the username) is no longer included in the email text
6. New link to take user to email notification settings.

Example: Commonwealth Procurement – AITR Notification for AITR to Enter AITR Recommendation

Oct 2022 Email Notification example: **Same step, after Nov 2022 upgrade**:

4. Minor changes to Planview Fasttrack based Reports

The **Planview Fasttrack reports** are those reports where you see a "code" on the report tile (like WRK##, RES##, STR##, MY##). This also includes project Status Reports, Timesheet Reports. For example, the shaded ones below are Fasttrack based reports.

TIP: The title on some tiles may be too long to see the "code". If you hover over the tile, you should be able to see the code:
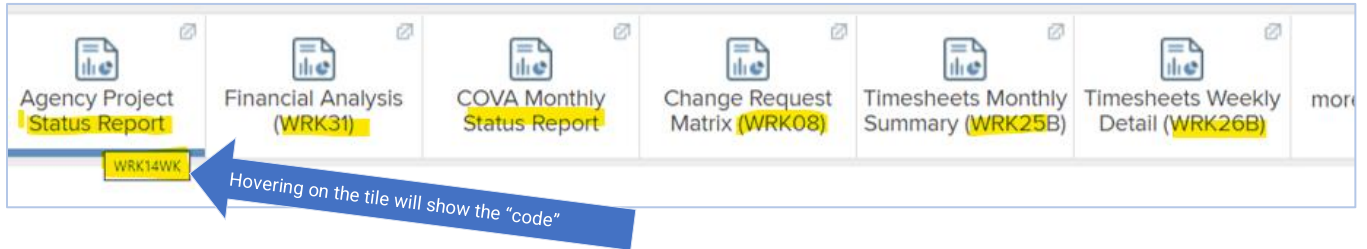
Font Change on Headings and Column Heading Shading

A change you may notice in addition to a font change on the report heading is that the column headings are no longer shaded. Below is a sample of the one of the Status reports:

October 2022 Release:
- Column headings shaded in tables

After November 2022 Release upgrade:
- Report heading has a new font
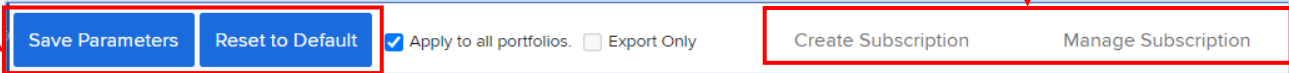- Column headings not shaded in tables

- **October 2022 Release:**
  - **Save Parameters** & **Reset to Default** buttons are green
  - **Subscription** buttons are gray with darker gray outline.
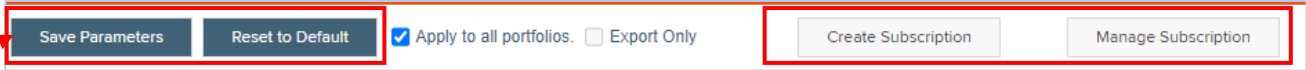

- **After November 2022 Release upgrade:**
  - **Save Parameters** & **Reset to Default** buttons are blue
  - **Subscription** buttons have no outline.

5. Export **Resource Management and Assignments** (RMA) or **Work and Assignments** (WAA) to PDF

Prior to the November 2022 Release upgrade, when either of these reports were exported to PDF, utilization would be represented by bars, even if the **Display Resource Utilization** preference option were set to **Only Values** or **Gradient Range**.

RMA view on a project, Preference set to **Only Values**:
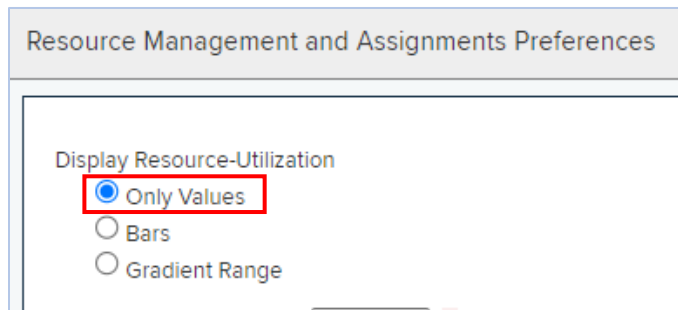
Notice, screen shows utilization by hours (values), for each time period:

	Name	Work N	7/1/2020	10/1/2020	1/1/2021	4/1/2021	7/1/2021
⋮	> Resource Name: ▮▮▮				488h	504h	512h
⋮	> Resource Name: ▮▮▮						
⋮	> Resource Name: ▮▮▮				488h	736h	1,200h
⋮	> Resource Name: ▮▮▮		3h	5h	54h	196h	464h
⋮	> Resource Name: ▮▮▮		1h	4h	492h	672h	1,024h

Export to PDF, October 2022 Release:

For same time periods as shown on screen, the PDF shows values (hours) and bars:

7/1/2020 (h)	10/1/2020 (h)	1/1/2021 (h)	4/1/2021 (h)	7/1/2021 (h)
		488	504	512
		488	736	1200
3	5	54	196	464
1	4	492	672	1024

Export to PDF, after November 2022 Release upgrade.

Same project as above, with same preferences, export now only shows Values (hours):

7/1/2020 (h)	10/1/2020 (h)	1/1/2021 (h)	4/1/2021 (h)	7/1/2021 (h)
		488	504	512
		488	736	1200
3	5	54	196	464
1	4	492	672	1024