1. New Names

Over the next few months, you may start noticing a change in the names and/or logos for the Planview suite of applications. You can read more about this on their blog at:
https://blog.planview.com/planview-unveils-new-product-names-at-accelerate-2022/

Here are the Planview applications that we are using here at the Commonwealth. You'll want to start to familiarize yourself with the new names and logos:

2. "Fly Out" option for Financial Planning Detail

Financial Planning Detail (accessed from the action menu, aka "kabob") now has a "fly out" () option similar to other options on the action menu.

- Clicking on the will open the Financial Planning Detail (FPD) screen in a new tab.
- Clicking to the left of the fly out option will open the FPD in place of your current screen:
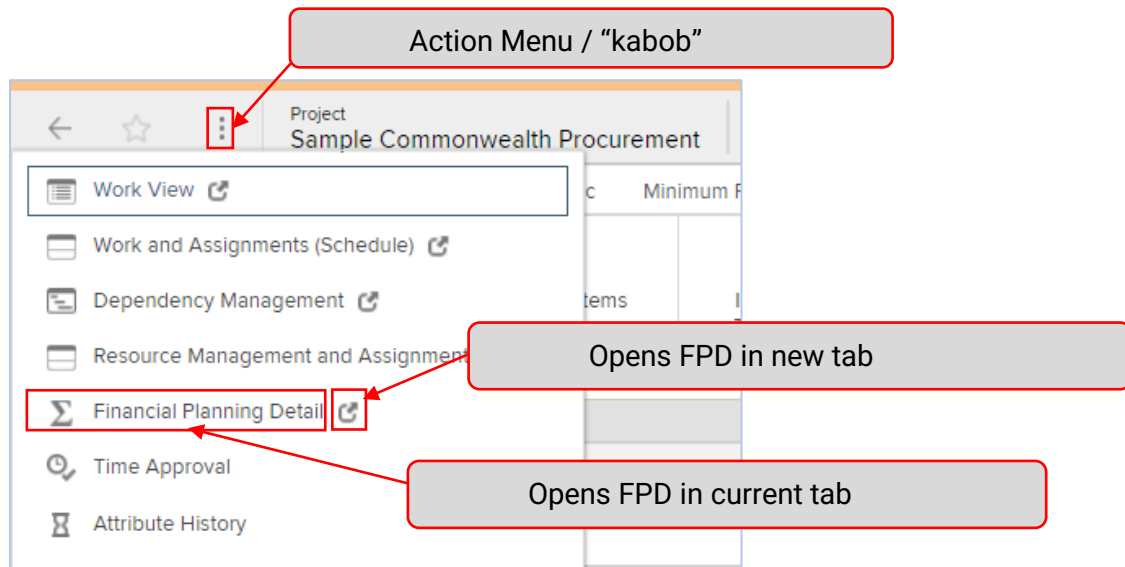
3. Notification Tile enabled.

The **Notifications: Informational** tile has been activated and will need to be added to your ribbon. For help with adding a tile, please see the job aid [PV Portfolios - How to Add Tile to a Ribbon](#)

This tile is available from your **My Overview**. It is available in these other menu options also, but **My Overview** is the key option where it should be added. Other menu options where the tile is available, if you have them (not everyone will have any/all of these menu options):

- Requests
- Work (portfolio & entity)
- Strategy (portfolio)
- Resource
- Outcome (portfolio)

This is where you will get various notifications, such as when a portfolio is shared with you or when ownership of a portfolio definition has been given to you.

- **Action/User Info**: Brief description of the action that triggered the notification.
- **Entity**: Name of the entity on which the Action was taken.
- **Description**: More information about the action and **who** initiated it.
- **Date**: Date notification was displayed.

4. Ability to reassign ownership of a portfolio to another user

Note: You must be the owner of the portfolio to reassign it. If you are not the owner, and the owner is no longer a user and you need to someone else to take over ownership of the portfolio, please contact the CTP Administrators at *ctpe1admin@vita.virginia.gov* to reassign it for you.

For assistance with reassigning ownership of your portfolio to another user, please see the *Job Aid Planview Portfolios – How to Share or Reassign a Portfolio*

5. Table/grid updates will now only require a single click to edit (instead of two clicks)

Any place where data is displayed in a "table" format (rows & columns), and the data is editable, we now only need to click once in an editable cell to do an edit. Just a couple of examples are below.

A. **Portfolio View example:** Single click in an editable cell highlights the data for update or deletion.

(1) **Example of a date field**. Make edit directly in the cell.

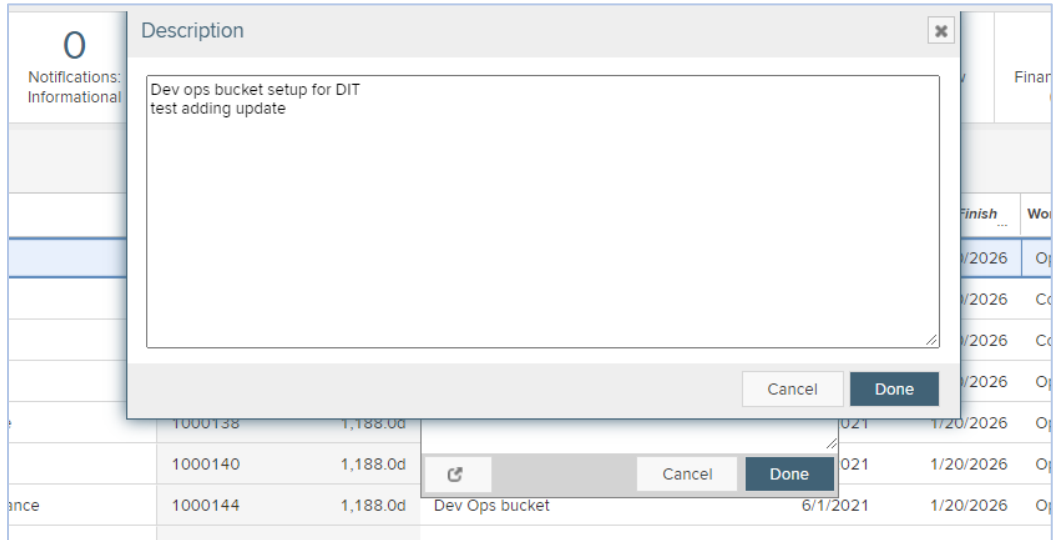(2) **Sample of a long text field**.

    i.   After edit is completed click on the **Done** button or **click out of the cell**.

         NOTE: *Clicking out of the cell is the same as using the **Done** button. **The edit is saved**.*

    ii. Use the **Cancel** button if you make an edit and decide not to keep it.

iii. Use the fly-out button (⌂) to open and edit the field in a separate, larger, window. The buttons work the same as above.


B. **Work and Assignments (Schedule) view Sample**:

Single click in any editable cell in the schedule will highlight and allow to edit:

	Line #	Name	Work Status	Schedule Start	Duration	Schedule Finish	Predecesso
⋮	1	∨ Project: Sonia Release TEST Project	Requested	9/21/2022	35d	11/10/2022	
⋮	2	∨ >: Initiate	Requested	9/21/2022	35d	11/10/2022	
⋮	3	• >>: sample task 1	Requested	9/21/2022	10d	10/4/2022	
⋮	4	• >>: sample task 2	Requested	10/5/2022	15d	10/26/2022	3
⋮	5	• >>: sample task 3	Requested	10/27/2022	10d	11/10/2022	4
⋮	6	• >: Planning	Requested				

6. Date selection calendars now show the calendar week number
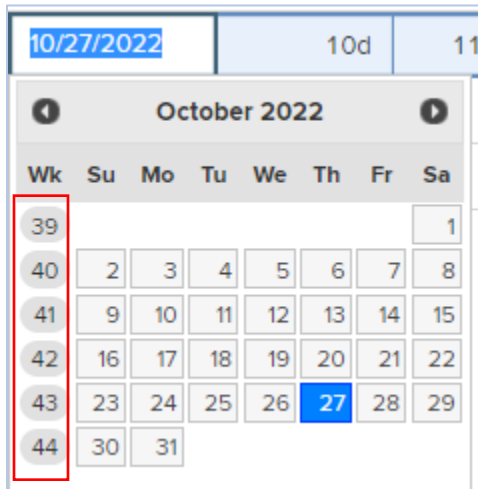
7. On enhanced screens (those with green section headers), long text fields can be edited in "full screen" mode.

You can tell a Long text field by the options for Bold, Italics, headings, Unordered list, Ordered list, and Preview. Since long text field basically will hold an unlimited number of characters, it can become a bit difficult to follow/read a field where a lot of data is entered. Planview has now provided a Full Screen edit option (⤢) to make it easier to edit this field type:
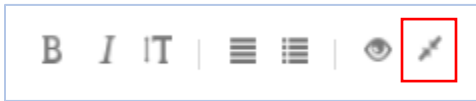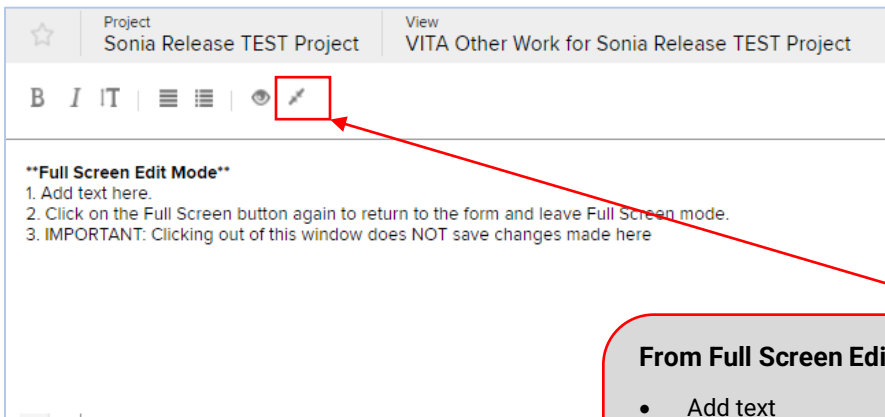
To use Full Screen Mode:

A. Click on the Full Screen mode button (⤢) on a long text field to update the field in **Full Screen** mode:
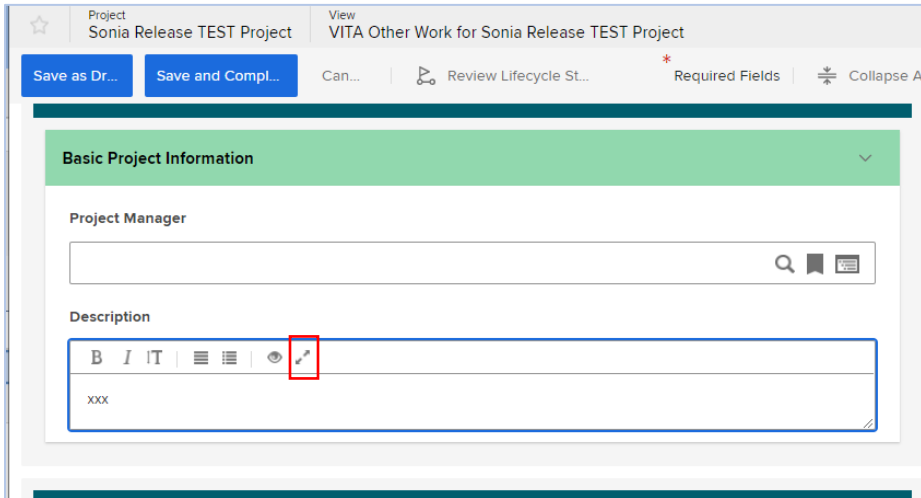
B. Window opens in Full Screen mode.

Make edits, then click on the Full Screen button again to return to the original form/page to complete remaining fields on the form and Save as Draft or Save and Complete (as necessary)

From Full Screen Edit mode

- Add text
- Click on the Full Screen Button again, to return to the form
- **IMPORTANT:** Just clicking out of the Full Screen does **NOT** save changes. You **must** return to the form and **Save** from the form.

C. Window returns to original screen/form after Full Page button was clicked again above:
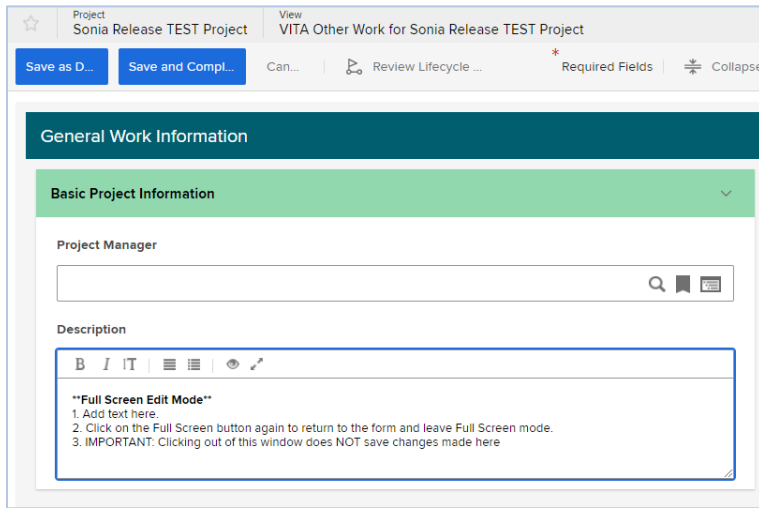
D. Finish the remaining fields on the form/page and **Save** the form as per usual.

8. Advancing to next field from a long-text field.

With this release, we can no longer use the tab key to advance from a long-text field to the next field on a screen.   Using the tab key within a long-text field now moves the text to the right within the long-text field.

Planview has advised me that this is by design, but they will address this as an enhancement in a future release. For now, to advance to the next field, we will need to click in the next field on the screen.

The first example below shows initial text entered into long-text field. Next examples shows the results of 1 tab, then a second tab. Shows the text being pushed to the right with each tab.
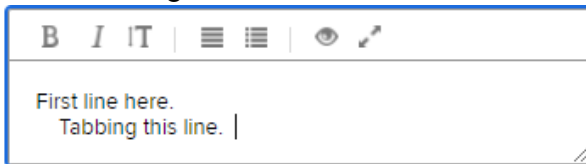
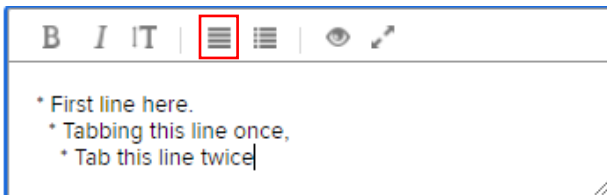**No tab:**
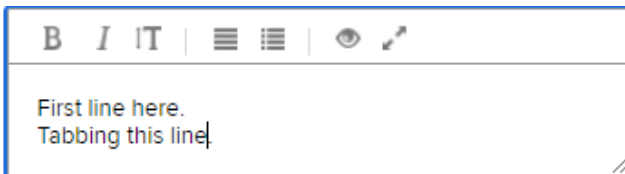
After tabbing second line once
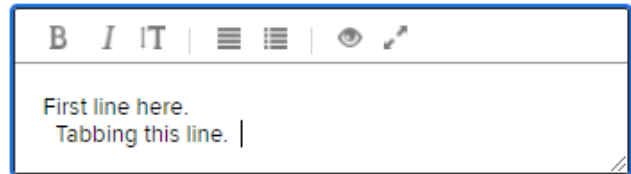
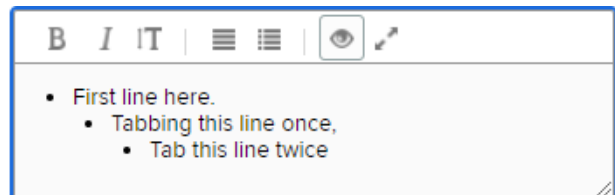**After tabbing second line twice.**

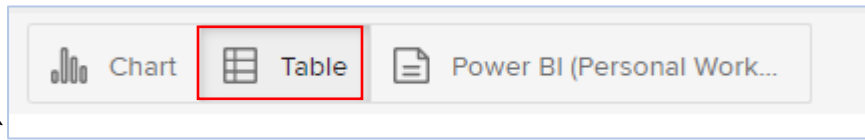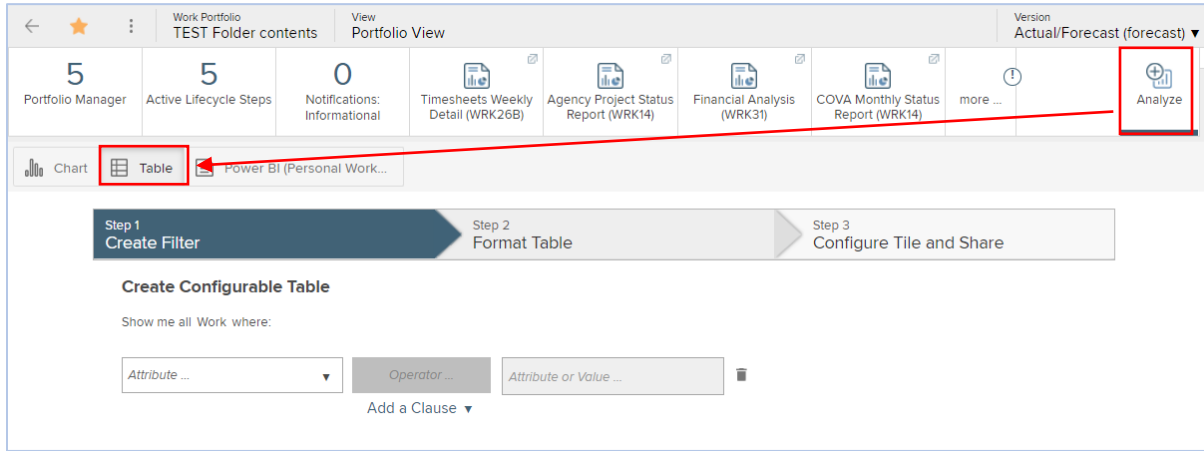This example shows how nice it looks when organizing bulleted lists:

Edit mode:

View mode

9. For those users that can see the Analyze tile, they will now also have a **Table** option (previously, only had Chart and Power BI (Personal Work) options).

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To find the Chart, Table, and Power BI buttons, click on the Analyze tile:

A guide for using the table option can be found at **Creating or Modifying a Configurable Table Tile** in the **Planview Customer Success Center** at:

https://success.planview.com/Planview_Enterprise_One/Portfolio_and_Resource_Management/Fundamentals/Ribbons_and_Tiles/Tiles/Configurable_Charts%2C_Tables%2C_and_Visualizations/Creating_or_Modifying_a_Configurable_Table_Tile