

# UNIVERSITY OF PLANVIEW

START YOUR PLANVIEW LEARNING JOURNEY HERE

VISUALIZE AGILE DELIVERY



## INTRO TO CONFIGURATIONS IN PLANVIEW ADAPTIVEWORK

### OVERVIEW

Essentials Training for Planview AgilePlace teaches everything you need to know to set you and your team up for success by optimizing AgilePlace functionality.

This course provides the skills required to implement Planview AgilePlace like a pro. This course provides a basic introduction on how to use Planview AgilePlace. Learn how to build your Kanban board in minutes. Get started on customizing your board, demonstrating your workflow, instilling WIP limits, and easily updating your team on project status.

### LEARNING OBJECTIVES

At the end of this course, you will learn the following skills:

- Visually communicate important work information and collaborate in Planview AgilePlace.
- Understand Kanban core practices and how measurement is a key maturity step within the methodology.
- Understand how board and card design can influence the insights we get in the AgilePlace Reports.
- Use the Board Health Tab to understand how smoothly work is flowing across your process.
- Use card analytics to understand card history and health.
- Customize card design including card types, custom icons and card ID.
- Add new work and find and update existing work.
- Use board layout editor to map a workflow to AgilePlace.
- Understand the different board roles and access levels.

### LEARNING LEVEL

#### Beginner

Aimed at individuals who have some familiarity with the subject but are still in the early stages of learning. Participants build a strong foundation for more advanced studies.

### WHO SHOULD ENROLL

This class is ideal for agile teams who will be responsible for planning work and projects, managing schedules and assignments on behalf of their organization or business unit.

# INTRO TO CONFIGURATIONS IN PLANVIEW ADAPTIVEWORK

## SUMMARY AGENDA

- Kanban Overview
- Board and Card Design
- Board Health
- Card History and Health

## PREREQUISITES

- Foundational level Planview platform knowledge required.
- Understanding of Kanban Methodology and Lean Agile principles.

## FORMAT

- Two (2) half-day sessions in a virtual classroom, or one (1) full-day sessions in an onsite classroom.
- All instructor-led classes are delivered hands-on in a virtual training environment.

## COST

- Private on-site or virtual training is available, email [trainingrequests@planview.com](mailto:trainingrequests@planview.com) to receive a quote.

Ready to get started?  
Contact us for more information!  
[trainingrequests@planview.com](mailto:trainingrequests@planview.com)