

UNIVERSITY OF PLANVIEW

START YOUR PLANVIEW LEARNING JOURNEY HERE

CONNECT AND ENGAGE YOUR WORKFORCE ACROSS THE ENTERPRISE



INTRO TO CONFIGURATIONS IN PLANVIEW ADAPTIVEWORK

OVERVIEW

Intro to Configurations training for Planview AdaptiveWork teaches the skills necessary to build, modify and optimize performance in the Planview AdaptiveWork production environment.

This course will explore the Planview AdaptiveWork configuration engine and learn how to expand out-of-the-box functionality to support tailored workflows. Learn how to build actions and use business rules to automate your company's various processes. This allow you to set up your organization's business processes and helps automate the flow of work from concept to completion.

LEARNING OBJECTIVES

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

- Understand the Planview AdaptiveWork Data Model and how it influences configuration.
- Utilize the Planview AdaptiveWork Configuration Engine to drive Business Process Automation.
- Use best practices to optimize performance.
- Create and update Interact rules.

LEARNING LEVEL

Advanced

Designed for experienced learners seeking a high level of expertise in the subject. It delves into advanced theories, methodologies, and real-world applications, challenging participants to solve complex problems and develop specialized skills.

WHO SHOULD ENROLL

This course is ideal for experienced administrators with a technical aptitude who will be responsible for managing the Planview AdaptiveWork production environment on behalf of their organization or business unit.

INTRO TO CONFIGURATIONS IN PLANVIEW ADAPTIVEWORK

SUMMARY AGENDA

- Configurable Elements
- Data Model
- Configuration Terminology
- AdaptiveWork Functions
- Configure a Process
- Other Customer Fields

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.

PREREQUISITES

- Intermediate level Planview platform knowledge required.
- Complete the Full Administration in AdaptiveWork course.
- Experience writing excel formulas is a plus.
- Knowledge of current processes and operating performance requirements.
- Be an administrator for Planview AdaptiveWork.

COST

- Pricing for Public Training is \$1,000 per person. [Enroll in classes here.](#)
- Private on-site or virtual training is available, email trainingrequests@planview.com to receive a quote.

Ready to get started?
Contact us for more information!
trainingrequests@planview.com