

# UNIVERSITY OF PLANVIEW

START YOUR PLANVIEW LEARNING JOURNEY HERE

TRANSLATE STRATEGY INTO RESULTS



## MANAGING WORK IN PLANVIEW PORTFOLIOS

### OVERVIEW

Managing Work training for Planview Portfolios teaches methodologies for portfolio and lifecycle management, project planning and execution, and maintain changes, risks and issues.

This course provides mastery of the core activities required add new requests for projects, outcomes, strategies and more, review and dispatch incoming requests based on projected needs. It also covers the skills needed to create new work and project items, manage and allocate work assignments, as well as an understanding of out-of-the-box reporting. This ensures your new work initiatives are positioned to run smoothly from the start through completion.

### LEARNING OBJECTIVES

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

- Add a request into the system, providing sufficient details to make a good decision whether to move forward with the request.
- Use the association feature to link a request with an entity, Work, Strategies or Outcomes.
- Understand work and project management responsibilities.
- Understand the initial work planning process.
- Create new work items.
- Review the work lifecycle and explain its parts.
- Manage the work schedule and assignments.
- Manage iterative work such as action items, stories or cards.
- Review and maintain information about your work.
- Familiarize yourself with the general navigation and functionality of the Work and Assignments screen.

### 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 course is ideal for users who will be responsible for planning work and projects, managing schedules and assignments, and regularly run reports on behalf of their organization or business unit.

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## SUMMARY AGENDA

- Requests
- New Work
- Lifecycles
- Work and Assignments
- Financial Planning Detail
- Changes, Risks and Issues
- Project Portfolios
- Content Management
- Time Reporting
- Progression
- Project Closure

## FORMAT

- Four (4) half-day sessions in a virtual classroom, or two (2) full-day sessions in an onsite classroom.
- All instructor-led classes are delivered hands-on in a virtual training environment.

## PREREQUISITES

- Foundational level Planview platform knowledge required.
- Complete the **Introduction to Planview Portfolios: Concepts and Navigation** e-Learning course.
- Complete the **Introduction to Planview Portfolios: Managing Requests** e-Learning course.
- Complete the **Introduction to Planview Portfolios: Managing Work** and Projects e-Learning course.
- Fundamental understanding of Project Management processes and methodology.

## 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)