

UNIVERSITY OF PLANVIEW

START YOUR PLANVIEW LEARNING JOURNEY HERE

TRANSLATE STRATEGY INTO RESULTS



MANAGING RESOURCES IN PLANVIEW PORTFOLIOS

OVERVIEW

Managing Resources training for Planview Portfolios teaches how to manage resources for an organization, fill resourcing requests and balance workloads.

This course provides the skills needed to review incoming resource requests and match with the appropriate person or team, plan for future staffing needs based on projected work, and regularly run reports on behalf of an organization or business unit. This ensures your resourcing program runs smoothly within your organization.

LEARNING OBJECTIVES

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

- Understand the responsibilities for managing people and teams.
- Review and manage the utilization and scheduling for a portfolio of resources and organizational resources.
- Create and maintain resource portfolios.
- Identify the resource assignment types used in the system and explain how each is used.
- Review upcoming resource demand.
- Fill resource requirement requests.
- Review the status of assignments for appropriateness.

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 managing teams and/or people on behalf of their organization or business unit.

MANAGING RESOURCES IN PLANVIEW PORTFOLIOS

SUMMARY AGENDA

- Resource Portfolios
- Resource Assignment Types
- Resource Management and Assignments (RMA)
- RMA – View and Fill Requirements
- Ongoing Resource Review and Management (Approvals)
- Timesheets
- Work Menu for Resource Review and Management
- Keep resource workloads balanced
- Fill out a resource's timesheet
- Approve time
- Review the resourcing of a work schedule
- Determine the resourcing consequences of making changing to the schedule

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

- **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 Resources** e-Learning course.
- Fundamental understanding of Project Management processes and methodology.

COST

- 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