

UNIVERSITY OF PLANVIEW

START YOUR PLANVIEW LEARNING JOURNEY HERE

TRANSLATE STRATEGY INTO RESULTS



GENERAL ADMINISTRATION IN PLANVIEW PORTFOLIOS

OVERVIEW

General Administration training for Planview Portfolios teaches administrators the best-practice methods, skills, and techniques for efficient management of the Planview Portfolios production environment.

This course provides the skills needed to perform the daily and weekly maintenance necessary to keep the system current and running, make necessary changes to organizations and roles, and make updates to any structures required by new business processes. This allow you to ensure the Portfolios production environment meets the needs of your user community.

LEARNING OBJECTIVES

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

- Understand Planview Portfolios configuration components.
- Perform Planview Portfolios management administration activities.
- Support the Planview Portfolios production environment.

LEARNING LEVEL

Intermediate

Intended for learners who have mastered the basics and are ready to delve deeper into the subject. It explores more complex concepts, techniques, and applications, allowing participants to enhance their knowledge and practical skills.

WHO SHOULD ENROLL

This course is ideal for administrators who will be responsible for managing the Planview Portfolios production environment on behalf of their organization or business unit.

GENERAL ADMINISTRATION IN PLANVIEW PORTFOLIOS

SUMMARY AGENDA

- Administer Users, User Roles, and Resources
- Configure Effective Dates for Resources
- Maintain Labor Rates
- Maintain Portfolio and Resource Management Calendars and Time Periods
- Customize Menus, Ribbons, and Actions
- Manage Attributes and Screens
- Manage Fields
- Manage Alternate Structures
- Manage Columns and Column Sets
- Maintain Financial Management System
- Manage Job Streams and Jobs
- Work with the Progressing Engine, Scheduling Engine, and Databases
- Perform Lifecycle Administration
- Customize Tiles
- Manage Report Subscriptions and Content

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

- **Beginner level Planview platform knowledge required.**
- Complete all of **the Introduction to Planview Portfolios** e-Learning courses.
- Be an administrator for Planview Portfolios.

COST

- Pricing for Public Training is \$2,000 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