Planview® Portfolios

TRANSLATE STRATEGY INTO RESULTS

ADVANCED ADMINISTRATION IN PLANVIEW PORTFOLIOS

OVERVIEW

Advanced Administration training for Planview Portfolios teaches the skills necessary to understand, build, and modify lifecycles, scripted dialogs, configured screens, custom fields, and structures in the Portfolios production environment.

This course focuses on the skills needed to perform perform tasks relevant to to the Process Delivery Center (PDC) architecture, set process performance objectives, and measure process performance by way of key performance indicators (KPIs) and through observing performance trends, actual vs. target, and statistical sampling. 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:

- Create and modify lifecycles and all supporting lifecycle elements.
- Create and modify scripted dialogs, configured screens, alternate structures and fields.
- Create and update Fields.
- Create and update Structures.
- Create and edit Request Mappings.
- Understand Configuration Migration.
- Understand what is available in Customer Care Support and Customer Success Center.

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 and process architects who will be responsible for managing the Portfolios production environment on behalf of their organization or business unit.

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SUMMARY AGENDA

- Create and modify lifecycles and all supporting lifecycle elements
- Create and modify scripted dialogs, configured screens, alternate structures and fields
- Create and update Fields
- Create and update Structures
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PREREQUISITES

- Intermediate level Planview platform knowledge required.
- Complete the **General Administration in Planview Portfolios** course.
- Knowledge of current processes and operating performance requirements.

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.

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.

Ready to get started?

Contact us for more information!

trainingrequests@planview.com

UNIVERSITY OF PLANVIEW