ACCELERATE PMO SUCCESS

Planview
PPM Pro

GENERAL ADMINISTRATION IN PLANVIEW PPM PRO

OVERVIEW

General Administration training for Planview PPM Pro teaches administrators the best-practice methods, skills, and techniques for efficient management of the PPM Pro 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 profiles, and make updates to any structures required by new business processes. This allow you to ensure the PPM Pro production environment meets the needs of your user community.

LEARNING OBJECTIVES

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

- Understand the organizational hierarchy.
- Know how to create permission profiles.
- Understand how to create and configure each of the main entities for project management.
- Know how to manage organizational calendars.
- Understand how to manage and configure timesheets.
- Know how to manage lookup lists.
- Know how to import data using Microsoft Excel.

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 PPM Pro production environment on behalf of their organization or business unit.

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SUMMARY AGENDA

- Administration Overview
- Entity Set-Up
- Permission Profiles
- Lookup Lists
- Data Import
- Resource Settings
- Organization Set Up
- User Creation and Management
- Timesheet Settings

PREREQUISITES

- Beginner level Planview platform knowledge required.
- Complete the **Workspace Essentials in Planview ProjectPlace** class or the equivalent knowledge.

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

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