

UNIVERSITY OF PLANVIEW

START YOUR PLANVIEW LEARNING JOURNEY HERE

GET WORK DONE – ALL IN ONE PLACE



WORKSPACE ESSENTIALS IN PLANVIEW PROJECTPLACE

OVERVIEW

Workspace Essentials training for Planview ProjectPlace teaches everything you need to know to work efficiently in ProjectPlace and collaborate with your team on projects, documents and action items.

This course provides mastery of the core activities required to plan upcoming work, visually communicate important work progress, as well as uploading and maintaining documentation.

LEARNING OBJECTIVES

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

- Familiarize yourself with the general navigation and functionality.
- Communicate with other Workspace members.
- Keep track of work with Kanban boards and cards.
- Work with documents and folders.
- Collaborate with other Workspace members.
- Understand the different board roles and access levels.

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 Workspace Members who are new to the ProjectPlace platform, and/or who will be responsible for managing work information through Kanban boards and cards.

WORKSPACE ESSENTIALS IN PLANVIEW PROJECTPLACE

SUMMARY AGENDA

- Introduction to ProjectPlace
- User Account
- My Overview
- Workspaces
- Conversations
- Work with the Plan
- Work with Boards
- Work with Cards
- Documents and Folders

FORMAT

- One (1) half-day sessions in a virtual or onsite classroom.
- All instructor-led classes are delivered hands-on in a virtual training environment.

PREREQUISITES

- Foundational level Planview platform knowledge required.
- Familiarity with Kanban concepts and principles.

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