

UNIVERSITY OF PLANVIEW

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WORKSPACE ADMINISTRATION IN PLANVIEW PROJECTPLACE

OVERVIEW

Workspace Administration training for Planview ProjectPlace provides everything you need to know to set you and your team up for success by optimizing workspace functionality.

This course provides and understanding of the activities required to create projects in the Plan tool, execute work using kanban boards that keep you informed of progress of ongoing tasks allowing for easy and accurate follow-ups, and collaborating with team members using conversations, documents, and meetings. This makes it easy to focus on the right things and ensures your project work smoothly.

LEARNING OBJECTIVES

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

- Create and manage workspaces.
- Know when to use a Roadmap vs. a Plan workspace.
- Invite members, create groups and set access rights for your workspace.
- Plan work using milestones, activities, and dependencies.
- Creating and customizing boards.
- Create and manage custom fields.
- Import or build a folder structure for documents.
- Create workspace and card templates.

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 Workspace Administrators who will be responsible for planning work and projects, managing schedules and assignments on behalf of their organization or business unit.

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SUMMARY AGENDA

- Introduction to Workspaces
- Create a Workspace
- Roles, Groups and Access Rights
- Workspace Settings
- Workspace and Card Templates
- Plan Tool
- Roadmaps
- Boards and Cards
- Documents

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

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

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