Planview® ProjectPlace

PROJECT-CENTRIC COLLABORATIVE WORKSPACES

WORKSPACE ADMINISTRATION TRAINING CLASS

COURSE DESCRIPTION

Workspace Administration training for Planview ProectPlace is an immersive, interactive class that teaches 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

By the end of this course students will learn how to:

- 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

PROGRAM LEVEL

Intermediate

Comprehensive class with a moderate amount of detailed information

Proficient product knowledge advised.

AUDIENCE

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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WORKSPACE ADMINISTRATION

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

PREREQUISITES

- Complete the Workspace Essentials class or the equivalent knowledge

COST

Private on-site or virtual training is available.

DURATION

1 Half-day segments in a virtual classroom

Ready to get started?

Contact us for more information!

trainingrequests@planview.com

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