Welcome to the Planview Training Academy! Here, you can learn to use any Planview product. Information is divided by product into broad topics called curricula, which include one or more courses. Each course contains a series of topics made up of text and videos that will enable self-enablement. Browse the products and curricula below or instantly access any course directly using the Course Library menu above. Or click on a product name to see all the curricula and courses for that product.

- **Planview Enterprise One - Portfolio and Resource Management**

**Getting Started**
Complete this course to familiarize yourself with the system before taking other curricula or courses for more in-depth information. This class presents information on all the components of Planview Enterprise One - Portfolio and Resource Management, including important concepts, common tasks, and frequently used screens in the application.

1 Course
foundational
Team Members - Time Reporters
Do you use the system only to report your time and view your assignments? This course is for you, whether you report time in Portfolio and Resource Management, in Projectplace, or via the mobile timesheet app.

4 Courses
beginner

Project and Work Management
Learn about how the system flexibly implements the project/work management process. Take projects/work from start to finish (requests, scheduling, finances, resource assignments, execution), manage timesheets from a work management perspective, and understand work reports and analytics.

14 Courses
beginner
Resource Management
Portfolio and Resource Management lets you work with teams of resources or individuals. Learn how to maintain information about each resource and then use that data to find resources that fit work requirements, or find any unfilled requirements that match a resource. Includes: timesheets for resource management, basic concepts and screen functions, assignment types, and data management.

4 Courses
beginner

Investment and Capacity Planning
Investment and Capacity Planning enables optimal program and project investment decisions. This curriculum provides an overview of functionality, covers the Rank, Analyze, and Balance pivot views, shows how to use Investment and Capacity planning to work with projects and create reports, and explains how to use preferences and the ribbon and tile interface.

5 Courses
Strategic Program Management

The goal of strategic planning is to use programs and their underlying projects to transform the business via any number of outcomes (e.g., products, applications, services, technology, facilities, and more). Discover how to create, build, review, and manage a strategic plan.

4 Courses

intermediate

Outcome Management

This curriculum covers the management of outcomes (products, services, applications, technology, assets, facilities, and more) in Portfolio and Resource Management.

3 Courses

intermediate
Microsoft Project Add-In and Portfolio and Resource Management
This curriculum lists best practices for using Microsoft Project with Enterprise One - Portfolio and Resource Management, then provides instructions for sharing data between the two systems.

1 Course
intermediate

General Administration
The administrator is responsible for defining and maintaining information about the structures, users, rates, calendars, tiles, dashboard reports, Data Mart, and extracts for the organization. These are things that change often and need to be maintained as time goes on.

1 Course
intermediate
Advanced Administration

Advanced administration covers creation and management of fields, alternate structures, request mappings, configured screens, lifecycle models, scripted dialogs and configuration migration. These activities go beyond daily administration tasks.

1 Course
advanced

Instructor-led Training Prerequisites

This curriculum is a prerequisite for instructor-led training in Planview Enterprise One. Students will be instructed as to which courses pertain to their scheduled training.

8 Courses
beginner
• Planview Enterprise One - Capability and Technology Management

Getting Started
Designed for users new to Capability and Technology Management, these courses provide an introduction to key concepts and completing basic tasks.

2 Courses
foundational

Data Management
This collection of courses introduces users to basic data management tasks, including creating and managing application and standards categories, creating and editing components, and managing lifecycles.

3 Courses
beginner
Reporting
Designed for business analysts, this collection of courses teaches users to analyze portfolio data by working with report tiles and SSRS reports.

1 Course
intermediate

Administration
This collection of courses gives an introduction to various administration tasks, including managing security, portfolios, tiles, and column sets.

1 Course
intermediate
• **Integrations**
  This collection of courses gives an introduction to working with Planview Enterprise One integrations.
  
  1 Course
  intermediate

• **Planview PPM Pro**

• **Getting Started**
  Get started quickly with an overview of the major features and important concepts in Planview PPM Pro.
  
  3 Courses
  foundational
Managing Projects
Learn how to effectively work with requests, manage project plans, monitor project execution, and closeout.

3 Courses
beginner

Managing Resources
Learn how to maintain resource attribute information, measure and optimize resource utilization, and review and approve timesheets.

3 Courses
beginner
Reports
Designed for new users, these courses explain the types of reports available, and how to create and work with reports.

10 Courses
intermediate

Dashboards
Use these courses to learn how to create and work with dashboards.

3 Courses
intermediate
• **Administration**
  For administrators only! These courses cover a variety of topics around setup and configuration of PPM Pro.
  13 Courses
  intermediate

• **Planview Projectplace**

• **Getting Started**
  Designed for users who are new to Projectplace, this collection of courses explains how to get started quickly, introduces all of the major tools, and discusses important concepts in Projectplace.
  1 Course
  foundational
Planning and Execution
This collection of courses familiarizes you with creating projects in the Plan tool, executing work using kanban boards to 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.

3 Courses
beginner

Administration
This collection of courses provides Projectplace administrators with information on setting up and managing Workspaces. Also, administrators responsible for managing the Projectplace Enterprise Account will learn how to set up the account, create teams, get access to statistics, look after workspaces and storage, and manage incoming workspace requests.

2 Courses
intermediate
• Planview LeanKit

Getting Started
Designed for users who are new to Planview LeanKit, these topics explain how to get started quickly, introduce the major features, and discuss important concepts in LeanKit.

1 Course
foundational

Working with Boards and Cards
Use these courses to learn how to use boards and cards in LeanKit.

3 Courses
beginner
Reporting for LeanKit
These courses cover the various options for reporting in LeanKit.

2 Courses
intermediate

Planview Spigit

Sponsors
Have you been assigned the Sponsor role in Planview Spigit? Here’s what you need to know to successfully sponsor challenges.

1 Course
beginner
• Administration
  Have you been assigned the Administrator or SuperAdministrator role in Planview Spigit? Here's what you need to know. SuperAdministrators need to know all the Administrator content PLUS their additional course.
  
  2 Courses
  intermediate

• Report Creator
  Have you been assigned the Report Creator role in Planview Spigit? Here's what you need to know.
  
  1 Course
  advanced
Getting Started
Designed for users who are new to the Planview Enterprise environment, this collection of courses explains how to customize your account preferences, introduces all the major interface elements, and discusses important concepts in Planview Enterprise.

7 Courses
beginner

Time Reporting
The simple, web-based timesheet tools allow an organization’s staff to report information to the central repository at any time from any place. This information is then used to update project schedules and account for the effort expended. Time may be approved automatically or reviewed by managers.

4 Courses
beginner
Projects and Work
This collection of courses familiarizes you with project/work management functionality in Planview Enterprise. Topics range from capturing demand via requests, through defining projects, planning and scheduling, project execution, and closure. Project-related topics such as CRIs and support tickets are also covered.

8 Courses
beginner

Resource Management
This curriculum teaches how Planview Enterprise enables a resource manager to maintain information about each resource and then use that data to find resources that fit work requirements, or find any unfilled requirements that match a resource. Basic concepts and screen functions are covered, assignment types are explained, and data management is discussed.

3 Courses
Analytics and Reporting
This course provides general information on working with reports and report tiles. Administrators can create and share custom and customizable chart or table report tiles that will display on the ribbons for Work, Strategies, Outcomes, and Requests entities. These reports can be configured to open within the Planview Enterprise main window or open in a new window. All users can view and change settings on these reports.

Investment and Capacity Planning
Investment and Capacity Planning enables optimal program and project investment decisions. Investment and Capacity Planning uses robust analysis to allow you to make better decisions on which program and project investments to approve based on financial and capacity targets. Available resource
capacity (typically by role and resource type) is compared with the requested demand to encourage informed planning decisions with capacity in mind.

2 Courses
intermediate

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**Strategic Planning and Outcomes**

Learn how to create build, review, and manage a strategic plan and its outcomes. The goal of strategic planning is to use programs and their underlying projects to transform the business via any number of outcomes (e.g., products, applications, services, technology, facilities, and more). Planview Enterprise's Strategy programs enables you to look at strategies in the context of the underlying delivery mechanisms (programs and projects) and outcomes.

5 Courses
intermediate

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Financial Planning
Use this curriculum to better understand budget setup and analysis. This curriculum consists of a single
course that focuses on the financial management of data in the system for project, strategies, and
outcomes. The material in this course is from the Project Financial Planning and Program Planning
capabilities.

1 Course
intermediate

Administration
The Planview Enterprise administrator is responsible for defining and maintaining information about the
structures, users, rates, calendars, tiles, dashboard reports, Data Mart, and extracts for the organization.
These are things that change often and need to be maintained as time goes on.

13 Courses
intermediate
Configuring Planview Enterprise
Set up and maintain many of the “behind the scenes” functions. These include the Global and System settings, the Labor Rates, the Requests functionality structure, the configuration of the Migration Tool, and also the administration of operational items such as Data Mart, content management and Agile functionality.

5 Courses
intermediate

Instructor-led Training
If you’d like to further enhance your knowledge after using the self-paced resources in the Academy you can see all the training courses which are led by Planview instructors, including classroom and virtual classes.

3 Courses
• Troux

Getting Started
Designed for users new to Troux, these courses introduce users to Capability and Technology Portfolio Management, the Troux metamodel, and completing basic tasks in Troux.

2 Courses
beginner

Data Management
This collection of courses introduces users to basic data management tasks, including creating and managing application and standards categories, creating and editing components, and managing lifecycles.

3 Courses
beginner
Administration
This collection of courses gives an introduction to various administration tasks, including managing Troux security, portfolios, tiles, and column sets.

1 Course
intermediate