



REVALIZE UNIVERSITY COURSE CATALOG

Product: PLAN-IT
Year 2025

Project and Replace Training

*Each quarter, the Revalize Training Team hosts a series of live, instructor-led courses that provide an overview of the key features and tools within the PLAN-IT application. This Project Training Series will prepare users to manage projects successfully and efficiently!**

*Want to be certified in PLAN-IT? We also offer certification for those that demonstrate A mastery of knowledge of the PLAN-IT application. Contact us to find out more!**

**Prices are as of January 1, 2025.*

**Please contact us on [our portal](#) to apply for the certification program and to inquire for other combined training packages and quotations, including private group and on-site training.*



[Revalize University](#)



[Support Portal](#)

PLAN-IT | PROJECT TRAINING

VIRTUAL PRIVATE CLASS

8 hours | Instructor-Led | \$2,750

ON-SITE PRIVATE CLASS

2 days | Instructor-Led | \$7,100

PRIVATE MENTORING SESSIONS

10 hours of mentoring sessions available for a year
(scheduled in a minimum of 30-minute increments)

Instructor-Led | \$2,495

Flexible schedule coordinated with the instructor.

More information on the topics covered are listed below.

Please contact us on [our portal](#) for quotation and scheduling.

Introduction to PLAN-IT

- Basic Navigation and Icons
- Navigation Menus and Resource Center
- Catalog Searching
- Categories and Subcategories Searching
- Supplier Searching
- Creating a Project (New/Clone)

Advanced Project Management II

- Creating and Managing Project and Org Scope Custom Fields
- Custom Products and Custom Suppliers
- Quick Exports
- Reporting Menu
- Configuring and Generating Report Exports
- Custom Reports

Project Management Basics

- Adding and Managing Project Rooms
- Managing Buildings, Levels, and Departments
- Adding and Managing Project Items
- Options and Accessories
- Project and Item History

Advanced Project Management I

- Creating and Managing Templates
- Creating Templates from Project Departments and/or Rooms
- Adding and Managing Products on Templates
- Managing and Assigning Project Budgets
- Custom Budgets
- Budget History

Procurement, Approvals, and Workflows

- Define Procurement vs. Requisition
- Create and Manage Requisitions
- Procurement Fields
- Approval Groups
- Item Approvals
- Request and Requisition Workflows
- Procurement Reports

Register at Revalize University learning.revalizesoftware.com
for self-paced courses, certifications, and more!

PLAN-IT | REPLACE TRAINING

VIRTUAL PRIVATE CLASS

4 hours | Instructor-Led | \$1,250

Topics Included for Admins:

- REPLACE Setup
- Import Hierarchy
- Adding Campuses, Buildings, Departments and Cost Centers
- REPLACE Budget
- Custom Fields
- User Management
- Operational Settings
- Managing Requisition Field Requirements
- Adding Approval Groups
- Managing Workflows

Topics Included for Users:

- Introduction to REPLACE
- Requested Items Management
- Request Approvals Management
- Requisition Management
- Reporting

PLAN-IT | PROJECT CERTIFICATION PROGRAM



To receive a certification, you will have to demonstrate a mastery of knowledge of all the features and tools within the PLAN-IT application. The Plan-It Certification Course Exam will confirm your understanding of the topics covered in the Project Training series, including but not limited to catalog searching, project building, room and item management, template management, budgeting, reporting, and procurement activities. *Although it is highly recommended that users attend training, it is not a requirement for certification.*

To receive certification, you must score an 80% or higher and have an active license at the time of completion.

If you have any questions or concerns, please feel free to reach out to the training team on [our portal](#).

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VIRTUAL Q&A SESSIONS

PLAN-IT | PROJECT Q&A SESSIONS

30 mins | Instructor-Led
Open to all subscribed users

DATE	TIME (US EASTERN)
THURS. JAN. 16, 2025	10:00 AM – 10:30 AM
THURS. FEB. 27, 2025	10:00 AM – 10:30 AM
THURS. MAR. 27, 2025	10:00 AM – 10:30 AM
THURS. APRIL 24, 2025	10:00 AM – 10:30 AM
THURS. MAY 22, 2025	10:00 AM – 10:30 AM
THURS. JUNE. 26, 2025	10:00 AM – 10:30 AM
THURS. JULY. 31, 2025	10:00 AM – 10:30 AM
THURS. AUG. 28, 2025	10:00 AM – 10:30 AM
THURS. SEPT. 18, 2025	10:00 AM – 10:30 AM
THURS. OCT. 30, 2025	10:00 AM – 10:30 AM
THURS. NOV. 20, 2025	10:00 AM – 10:30 AM
THURS. DEC. 18, 2025	10:00 AM – 10:30 AM

PLAN-IT | PROJECT Q&A SESSIONS

for 2.0 to 3.0 transition

30 mins | Instructor-Led
Open to all subscribed users,
2.0 to 3.0 Migration Manual provided

Schedule available upon request.

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