



REVALIZE UNIVERSITY COURSE CATALOG

Product: PLAN-IT | Project

Project Training Series

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

**Price per session is \$125/person as of February 1, 2023.*

**Please contact us at training@revalizesoftware.com for other combined training packages and quotations, including private group and onsite training.*

 Revalize Training Team

 training@revalizesoftware.com

Course Name: Basic Navigation & Catalog Searching Training

1-Hour | Instructor-Led

Coverage:

- ✓ Navigating the Interface
- ✓ The Resource Center
- ✓ Accessing Organizations
- ✓ User Profile
- ✓ Searching the Catalog
- ✓ Categories, Subcategories, & Supplier Searching
- ✓ Product Favorites
- ✓ Org Scope Pricing

DATE	TIME (US EASTERN)
TUES. JAN 10, 2023	1:00 PM – 2:00 PM
WED. APR 5, 2023	11:00 AM – 12:00 PM
TH JULY 13, 2023	2:00 PM – 3:00 PM
MON OCT 9, 2023	11:00 AM – 12:00 PM

Course Name: Project Building & Project History Training

1-Hour | Instructor-Led

Coverage:

- ✓ Creating and Managing Projects
- ✓ Managing Project Teams and Permissions
- ✓ Navigating Project Tools
- ✓ Favorite Projects
- ✓ Creating Buildings, Levels, Departments, and Rooms
- ✓ Change Notes
- ✓ Project History

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TUES. JAN 10, 2023	2:15 PM – 3:15 PM
WED. APR 5, 2023	12:15 PM – 1:15 PM
TH JULY 13, 2023	3:15 PM – 4:15 PM
MON OCT 9, 2023	12:15 PM – 1:15 PM

Course Name: Room Management Training

1-Hour | Instructor-Led

Coverage:

- ✓ Room Management Tools & Icons
- ✓ Adding Rooms
- ✓ Adding Rooms from Templates
- ✓ Editing Room Details
- ✓ Managing Rooms
- ✓ Adding Items

DATE	TIME (US EASTERN)
TUES. JAN 17, 2023	1:00 PM – 2:00 PM
WED. APR 12, 2023	11:00 AM – 12:00 PM
TH JULY 20, 2023	2:00 PM – 3:00 PM
MON OCT 16, 2023	11:00 AM – 12:00 PM

Course Name: Item Management Training

1-Hour | Instructor-Led

Coverage:

- ✓ Navigating the Items Table
- ✓ Item Management Tools & Icons
- ✓ Adding and Managing Items in Projects
- ✓ Managing Item Details
- ✓ Item History

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TUES. JAN 17, 2023	2:15 PM – 3:15 PM
WED. APR 12, 2023	12:15 PM – 1:15 PM
TH JULY 20, 2023	3:15 PM – 4:15 PM
MON OCT 16, 2023	12:15 PM – 1:15 PM

Course Name: Custom Fields, Products, and Suppliers Training

1-Hour | Instructor-Led

Coverage:

- ✓ Project Settings
- ✓ Adding and Managing Custom Fields
- ✓ Project Scope vs Org Scope
- ✓ Custom Suppliers/Vendors/Manufacturers
- ✓ Custom Items/Products

DATE	TIME (US EASTERN)
TUES. JAN 24, 2023	1:00 PM – 2:00 PM
WED. APR 19, 2023	11:00 AM – 12:00 PM
TH JULY 27, 2023	2:00 PM – 3:00 PM
MON OCT 23, 2023	11:00 AM – 12:00 PM

Course Name: Options and Accessories Training

1-Hour | Instructor-Led

Coverage:

- ✓ Defining Options vs. Accessories or Associated Products
- ✓ Managing Options on Products and Items
- ✓ Adding and Managing Associated Products
- ✓ Applying Options and Accessories to Projects

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WED. APR 19, 2023	12:15 PM – 1:15 PM
TH JULY 27, 2023	3:15 PM – 4:15 PM
MON OCT 23, 2023	12:15 PM – 1:15 PM

Course Name: Template Management Training

1-Hour | Instructor-Led

Coverage:

- ✓ Adding New Templates
- ✓ Creating Templates from Rooms
- ✓ Adding and Managing Organizational and Personal Templates
- ✓ Using Department and Room Templates in Projects

DATE	TIME (US EASTERN)
TUES. JAN 31, 2023	1:00 PM – 2:00 PM
WED. APR 26, 2023	11:00 AM – 12:00 PM
TH AUG 3, 2023	2:00 PM – 3:00 PM
MON OCT 30, 2023	11:00 AM – 12:00 PM

Course Name: Budgeting Training

1-Hour | Instructor-Led

Coverage:

- ✓ Budget Summary
- ✓ Managing Project Budgets
- ✓ Creating Points in Time
- ✓ Item Additions and Deductions
- ✓ Assigning Budgets
- ✓ Budget History

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TH AUG 3, 2023	3:15 PM – 4:15 PM
MON OCT 30, 2023	12:15 PM – 1:15 PM

Course Name: Reporting Training

1-Hour | Instructor-Led

Coverage:

- ✓ Quick Exports
- ✓ Exporting Tables
- ✓ Reports Menu
- ✓ Queued and Ready Reports
- ✓ Report Sharing
- ✓ Configuring Reports

DATE	TIME (US EASTERN)
TUES. FEB 7, 2023	1:00 PM – 2:00 PM
WED. MAY 3, 2023	11:00 AM – 12:00 PM
TH AUG 10, 2023	2:00 PM – 3:00 PM
MON NOV 6, 2023	11:00 AM – 12:00 PM

Course Name: Procurement, Approval, and Workflow Training

1-Hour | Instructor-Led

Coverage:

- ✓ Manage Project Settings
- ✓ Requisition Defaults
- ✓ Adding Bill-To and Ship-To Addresses
- ✓ Adding and Assigning Approval Groups
- ✓ Adding and Assigning Workflows

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