



REVALIZE UNIVERSITY COURSE CATALOG

Product: PLAN-IT

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!**

*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 June 1, 2023.*

**Please contact us at training@revalizesoftware.com to apply for the certification program and to inquire for other combined training packages and quotations, including private group and onsite training.*



Revalize Training Team



training@revalizesoftware.com

PROJECT TRAINING SERIES

VIRTUAL PRIVATE CLASS

8 hours | Instructor-Led | \$2,500

ON-SITE PRIVATE CLASS

2 days | Instructor-Led | \$6,650

All users with active license within the organization are encouraged to attend.
 More information on the topics covered are listed below. Flexible schedule coordinated with the instructor.
 Please contact us for quotation and scheduling at training@revalizesoftware.com

VIRTUAL SCHEDULED CLASSES

Instructor-Led | \$125 per session and person

Group rates available. Contact us for more information

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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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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TUES. JAN 24, 2023	2:15 PM – 3:15 PM
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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TUES. JAN 31, 2023	2:15 PM – 3:15 PM
WED. APR 26, 2023	12:15 PM – 1:15 PM
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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PLAN-IT 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 our training team directly training@revalizesoftware.com.