



REVALIZE UNIVERSITY COURSE CATALOG

Product: PLAN-IT
Schedule for Year 2024

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

1-Hour | Instructor-Led | \$125 per session and person

Group rates available. Contact us for more information

Basic Navigation & Catalog Searching Training

1-Hour | Instructor-Led | \$125 per person

- 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)
THURS. JAN. 18, 2024	1:00 PM – 2:00 PM
THURS. APRIL 18, 2024	1:00 PM – 2:00 PM
THURS. JULY 18, 2024	1:00 PM – 2:00 PM
THURS. OCT. 17, 2024	1:00 PM – 2:00 PM

Project Building & Project History Training

1-Hour | Instructor-Led | \$125 per person

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

DATE	TIME (US EASTERN)
THURS. JAN. 18, 2024	2:15 PM – 3:15 PM
THURS. APRIL 18, 2024	2:15 PM – 3:15 PM
THURS. JULY 18, 2024	2:15 PM – 3:15 PM
THURS. OCT. 17, 2024	2:15 PM – 3:15 PM

Room Management Training

1-Hour | Instructor-Led | \$125 per person

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

DATE	TIME (US EASTERN)
THURS. JAN. 25, 2024	1:00 PM – 2:00 PM
THURS. APRIL 25, 2024	1:00 PM – 2:00 PM
THURS. JULY 25, 2024	1:00 PM – 2:00 PM
THURS. OCT. 24, 2024	1:00 PM – 2:00 PM

Item Management Training

1-Hour | Instructor-Led | \$125 per person

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

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THURS. JAN. 25, 2024	2:15 PM – 3:15 PM
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THURS. JULY 25, 2024	2:15 PM – 3:15 PM
THURS. OCT. 24, 2024	2:15 PM – 3:15 PM

Custom Fields, Products, and Suppliers Training

1-Hour | Instructor-Led | \$125 per person

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

DATE	TIME (US EASTERN)
THURS. FEB. 1, 2024	1:00 PM – 2:00 PM
THURS. MAY 2, 2024	1:00 PM – 2:00 PM
THURS. AUG. 1, 2024	1:00 PM – 2:00 PM
THURS. OCT. 31, 2024	1:00 PM – 2:00 PM

Options and Accessories Training

1-Hour | Instructor-Led | \$125 per person

- 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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THURS. MAY 2, 2024	2:15 PM – 3:15 PM
THURS. AUG. 1, 2024	2:15 PM – 3:15 PM
THURS. OCT. 31, 2024	2:15 PM – 3:15 PM

Template Management Training

1-Hour | Instructor-Led | \$125 per person

- 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)
THURS. FEB. 8, 2024	1:00 PM – 2:00 PM
THURS. MAY 9, 2024	1:00 PM – 2:00 PM
THURS. AUG. 8, 2024	1:00 PM – 2:00 PM
THURS. NOV. 7, 2024	1:00 PM – 2:00 PM

Budgeting Training

1-Hour | Instructor-Led | \$125 per person

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

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THURS. AUG. 8, 2024	2:15 PM – 3:15 PM
THURS. NOV. 7, 2024	2:15 PM – 3:15 PM

Reporting Training

1-Hour | Instructor-Led | \$125 per person

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

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THURS. FEB. 15, 2024	1:00 PM – 2:00 PM
THURS. MAY 16, 2024	1:00 PM – 2:00 PM
THURS. AUG. 15, 2024	1:00 PM – 2:00 PM
THURS. NOV. 14, 2024	1:00 PM – 2:00 PM

Procurement, Approval, and Workflow Training

1-Hour | Instructor-Led | \$125 per person

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

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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.