



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 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, 2024.*

**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

INDIVIDUAL CLASS SESSIONS

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

Group rates available.

Contact us for more information

ANNUAL SUBSCRIPTION

Instructor-Led | Access to Project Training Series

Open to all subscribed users within the organization.

Contact us for more information

Introduction to PLAN|IT

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

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

DATE	TIME (US EASTERN)
THURS. JAN. 25, 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 Management Basics

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

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

DATE	TIME (US EASTERN)
THURS. FEB. 1, 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

Advanced Project Management I

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

- 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

DATE	TIME (US EASTERN)
THURS. FEB. 8, 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

Advanced Project Management II

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

- 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

DATE	TIME (US EASTERN)
THURS. FEB. 15, 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

Procurement, Approvals, and Workflows

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

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

DATE	TIME (US EASTERN)
THURS. FEB. 22, 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

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.

VIRTUAL Q&A SESSIONS

PLAN|IT Q&A SESSIONS

30 mins | Instructor-Led

Open to all subscribed users

DATE	TIME (US EASTERN)
THURS. JAN. 25, 2024	10:00 AM – 10:30 AM
THURS. FEB. 22, 2024	10:00 AM – 10:30 AM
THURS. MAR. 21, 2024	10:00 AM – 10:30 AM
THURS. APRIL 11, 2024	10:00 AM – 10:30 AM
THURS. MAY 9, 2024	10:00 AM – 10:30 AM
THURS. JUNE 6, 2024	10:00 AM – 10:30 AM
THURS. JUNE 27, 2024	10:00 AM – 10:30 AM
THURS. AUG. 1, 2024	10:00 AM – 10:30 AM
THURS. AUG. 29, 2024	10:00 AM – 10:30 AM
THURS. SEPT. 26, 2024	10:00 AM – 10:30 AM
THURS. OCT. 24, 2024	10:00 AM – 10:30 AM
THURS. NOV. 14, 2024	10:00 AM – 10:30 AM
THURS. DEC. 5, 2024	10:00 AM – 10:30 AM

PLAN|IT 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.