UNIVERSITY OF PLANVIEW

START YOUR PLANVIEW LEARNING JOURNEY HERE

REGISTRATION AND ENROLLMENT GUIDE

NOVEMBER 2023

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FREQUENTLY ASKED QUESTIONS

REGISTRATION AND ENROLLMENT

Who can register for an account?

Registration is available to all **current** customers, and requires **official business email addresses**, personal email address will be declined. (ex: yahoo, gmail)

I just submitted my registration request, can I sign-in now?

MAYBE. All accounts are subject to a security screening prior to approval. This may take up to 1 business day.

What forms of payment are accepted for paid courses?

Two forms of payment are accepted: **Credit Cards** and pre-paid **Enrollment Certificates** (EC). ECs may be purchased from your Planview sales rep.

BADGES AND CERTIFICATIONS

I earned a new badge, where do I find my awarded badges?

Select the trophy icon to open the **My Badges** page and see all earned badges.

I earned a certification, where do I find my certificate?

You may download the earned certificate directly from the **Certification course**.

I am proud of my badge/certification, how can I share on social media?

You may share directly to Linkedin and/or Facebook from the **My Badges** page.

PUBLIC TRAINING CLASSES

Does "public" mean these classes are available to non-Planview customers, partners and employees?

NO The Planview Public Training classes are only available for enrollment by current Planview customers, partners and employees only.

I enrolled in a class, can I share the class link with others, or have someone watch over my shoulder?

NO Planview classes are structured to provide the optimal learning experience for one learner per enrollment.

Can I come and go from the class, or do I need to be in attendance the entire time?

The classes are delivered in a **hands-on** training environment, and each activity builds upon the last.
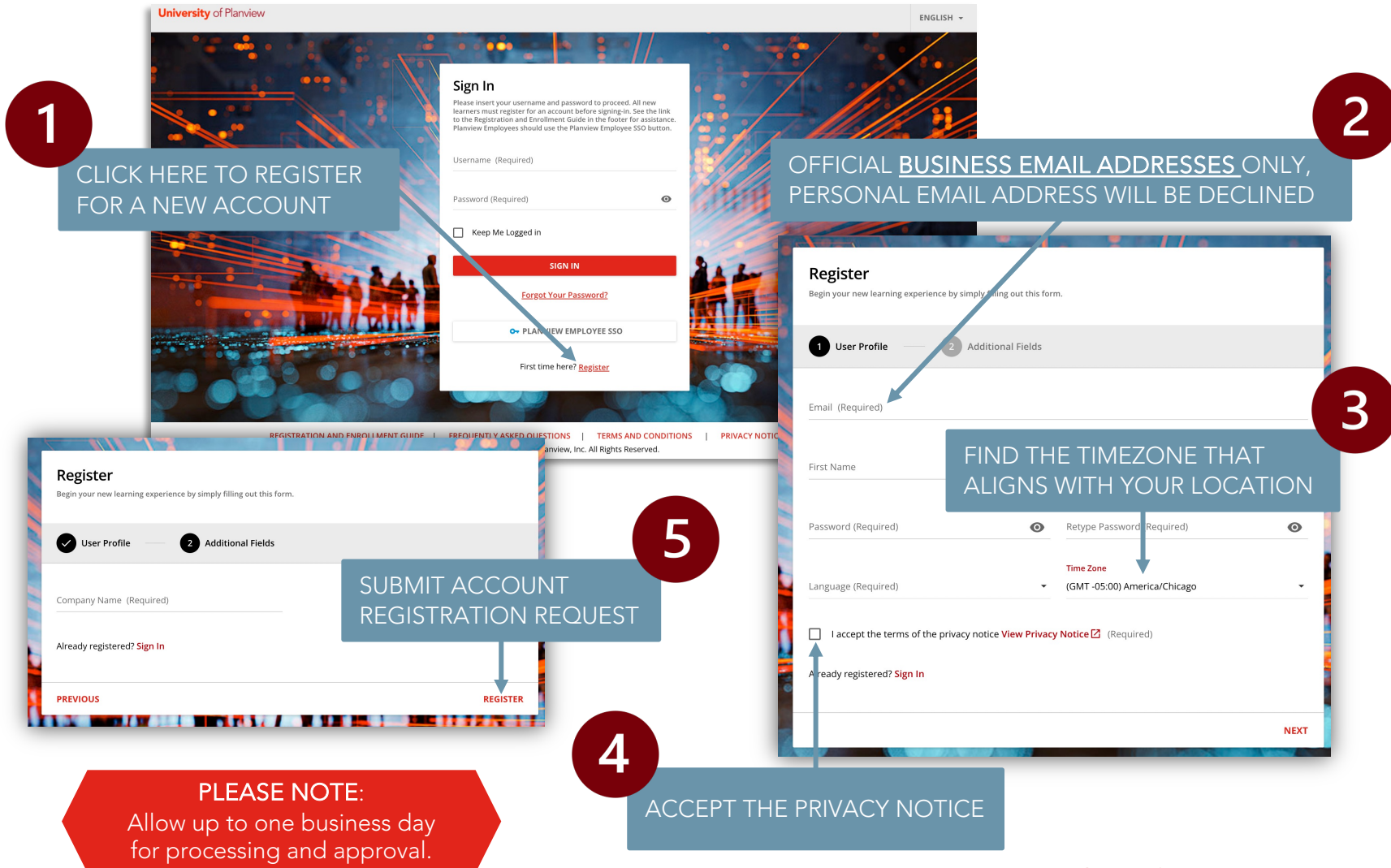
REGISTRATION PROCESS

NEW LEARNERS

Go to
https://university.planview.com

1. If you are a new learner, select the Register button to set up a new account.

2. Using your official business email address, fill in the required information.

3. Select Register to submit request.

4. You will receive an automated confirmation email after your registration has been approved.

1 CLICK HERE TO REGISTER FOR A NEW ACCOUNT

2 OFFICIAL BUSINESS EMAIL ADDRESSES ONLY, PERSONAL EMAIL ADDRESS WILL BE DECLINED

3 FIND THE TIMEZONE THAT ALIGNS WITH YOUR LOCATION

5 SUBMIT ACCOUNT REGISTRATION REQUEST

4 ACCEPT THE PRIVACY NOTICE

PLEASE NOTE:
Allow up to one business day for processing and approval.

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NAVIGATION

USER MENU

ON-DEMAND COURSE CATALOG

On-demand e-learning course catalogs spanning the Planview platform, solutions and more.

PUBLIC TRAINING CLASSES

Instructor-led training classes available for enrollment by Planview customers, partners and employees.

MY LEARNING DASHBOARD

View all your activities and locate all your enrolled courses, learning plans, and certification programs.

MY PROFILE

Update your personal information, preferences, and password.

University of Planview

Sign Out

MT

Username
email@domain.com

- Home Page
- My Learning Dashboard
- Public Training Classes
- On-Demand Course Catalog
- Frequently Asked Questions
- Contact Us
- Planview Customer Success Center

SELECT TO OPEN USER MENU

REVIEW NOTIFICATIONS

ACCESS MY PROFILE HERE

NAVIGATE TO ON-DEMAND COURSES CATALOG

University of Planview

Home Page

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START YOUR PLANVIEW LEARNING JOURNEY HERE

Explore On-Demand Courses
Look through our complete e-Learning catalog to find the online learning that is right for you.
VIEW ON-DEMAND CATALOG

Attend Public Training Classes
Enroll in one of our instructor-led Public Training classes, delivered hands-on in a dedicated training environment.
CLASS SCHEDULE

My Learning Dashboard
Navigate to My Learning Dashboard in the User Menu to access all of your courses and learning plans, and manage your account.
TAKE ME THERE

Contact Us
Do you need help with your University of Planview account, or have other learning support needs?
CONTACT US

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PLEASE NOTE
Courses will only show in your My Learning Dashboard after you have enrolled in them.

NAVIGATE TO PUBLIC TRAINING CLASSES CATALOG

NAVIGATE TO YOUR MY LEARNING DASHBOARD

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NAVIGATION

MY LEARNING DASHBOARD

MY ACTIVITIES

View the statistics of your activity across the University of Planview.

MY COURSES AND LEARNING PLANS

Collection of your enrolled courses, learning plans, and certification programs.

Not Started – Enrolled courses waiting to be started. Open the course to begin learning.

In Progress – Courses may be paused, unless otherwise noted. Open the course to resume learning where you stopped.

Completed – Open completed courses or learning plans to download available course completion or certification documents.

FILTER TO NARROW DOWN YOUR ENROLLED COURSES

PLEASE NOTE
Courses will only show in your My Learning Dashboard after you have enrolled in them.

REVIEW THE DETAILS OF ALL YOUR LEARNING ACTIVITIES

MONITOR COURSES THAT MAY HAVE A DEADLINE

SEE YOUR PROGRESS AT A GLANCE

CALENDAR TRACKS APPLICABLE DUE DATES AND INSTRUCTOR-LED TRAINING CLASSES

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NAVIGATION

BADGES & CERTIFICATIONS

MY BADGES

View all available badges and certifications.

Integrated sharing to LinkedIn and/or Facebook for earned badges.

CERTIFICATIONS

Available for those who have completed all the required criteria to earn a certification.

Download directly from the certification course.

COURSE COMPLETION DOCUMENTS

Available for all completed Public Training classes.

Download directly from the course.

NAVIGATE TO THE MY BADGES PAGE

SELECT BADGE OR CERTIFICATION TO REVIEW CRITERIA FOR EARNING

ACCESS COMPLETED COURSES AND LEARNING PLANS

SOCIAL MEDIA SHARING FOR EARNED BADGES AND CERTIFICATIONS

DOWNLOAD AVAILABLE

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ENROLLMENT PROCESS

ON-DEMAND COURSES

Go to the
On-demand Course Catalog

1. Select a course and review the details in the *Course Description*.

2. Select Enroll to add this course to your *My Learning Dashboard*.

   - For paid courses, see *Paid Courses* page below.

3. Once enrolled, you may Start Learning Now, or wait until later.

1 FIND DETAILS ABOUT PREREQUISITES, LEARNING LEVELS, INTENDED AUDIENCE AND MORE

2 ENROLL IN THE COURSE HERE

3 START YOUR LEARNING WHEN YOU ARE READY

EMAIL CONFIRMATION SENT AS WELL

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ENROLLMENT PROCESS

PUBLIC TRAINING CLASSES

Go to the
Public Training Classes Catalog

1. Select Show More to review the *Course Description*.

2. Review session dates and click Add To Cart for the session you are planning to attend.

3. Go To Cart and begin checkout process.

   - Apply *Enrollment Certificate* if applicable.

   - For credit cards, see the *Paid Courses* page below.

4. Agree to the Terms and Conditions.

5. Provide *Billing Information* before selecting Confirm Order to complete the enrollment.

COURSE DETAILS ARE DOWNLOADABLE TO SHARE WITH OTHERS

SELECT SESSION TO ENROLL IN THE COURSE

SELECT THE APPLY ENROLLMENT CERTIFICATE TO APPLY THE DISCOUNT

BEGIN CHECKOUT PROCESS

PROVIDE BILLING INFORMATION AND CONFIRM ORDER

AGREE TO TERMS AND CONDITIONS POLICY

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ENROLLMENT PROCESS

PAID COURSES

1. Select **Checkout** to begin checkout process.

2. Provide *Billing Information* before selecting **Confirm Order** to complete the enrollment.

   - Apply *Enrollment Certificate* if applicable.

3. Agree to the **Terms and Conditions**.

4. If paying by credit card, enter details and click **Pay** to complete payment.

5. Congratulations, you are now enrolled! Take this opportunity to download your receipt if needed.

You will receive an automated email with your enrollment details, suggested best practices, and a link to add the Public Training class to your calendar.

1 BEGIN CHECKOUT PROCESS

2 INPUT BILLING INFORMATION

IF APPLICABLE, ENTER AND SELECT APPLY ENROLLMENT CERTIFICATE TO APPLY THE DISCOUNT

SELECT PAY TO COMPLETE ENROLLMENT

3 AGREE TO THE TERMS AND CONDITIONS

4

OPEN TO VIEW AND DOWNLOAD RECEIPT

5

PLEASE NOTE
If the credit card payment is not completed, you will be placed on a waitlist through the end of the day. Afterwards, you will receive an "unenrollment" email to let you know you are clear to try again.

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ENROLLMENT PROCESS

Enrollment Changes

Go to your
My Learning Dashboard

1. Select the enrolled *Public Training* class to see details and options.

2. Click the *ellipses* in the top right side of the page to access options.

3. Select **Change Session Enrollment** to move to a different class.

4. Review and select new session date then click **Change** to complete the change.

To cancel an enrollment, or move to a different class, please email
university@planview.com

OPEN ELLIPSES TO SEE OPTIONS

CHANGE SESSIONS HERE

REVIEW AVAILABLE SESSION OPTIONS

PLEASE NOTE
You are only able to move to another session for the same class. You are not able to move classes here.

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CONTACT US

GENERAL LEARNING NEEDS

For private training quotes and SOWs, Public Training schedules and support, or other customer learning needs.

trainingrequests@planview.com

UNIVERSITY OF PLANVIEW HELP DESK

For University of Planview access issues, or other system admin needs.

university@planview.com

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