



Fundamentals of Project Management for PSA Virtual Training 2021

Course Overview

Fundamentals of Upland PSA is an 8-hour course that will help users familiarize themselves with Upland PSA, and how it can be used to assist them in their day to day business practices. The aim is to equip the user with the understanding and know-how to efficiently navigate the application and use each of the functional modules. The course employs a practical strategy to tackle key concepts in Upland PSA, including actual professional services business scenarios.

Upland PSA Fundamentals follows an active learning methodology by carrying out hands on exercises that encourage the participant's understanding of Upland PSA. This course will be given using a combination of lecture, demonstration and exercises.

Benefits:

This hands-on experience will allow you to gain knowledge of how to effectively manage Projects in Upland PSA, as well as perform detailed project Task scheduling by taking advantage of an integration with Upland Project Planner (UPP). You will also receive an official Certificate of Completion at the end of the course.

Course Objectives:

- Navigating the Project Home Page and the updated Projects Module: Project List | Project Overview | Project Edit.
- Understanding the Features and Functionalities in creating and managing projects in Upland PSA and UPP.
- Creating and leveraging a Project Template with Tasks in Upland PSA (Tenrox).
- Establishing a Project Team in Upland PSA (Tenrox).
- Completing Project Task scheduling in UPP.
- Monitoring and viewing Project entries.
- Capturing project status information through the Project Status Report.
- Understanding the Built-In Project Status Report.
- Using Out-of-the-Box Project Management reports.
- Creating a Project Management report.

Delivery Method:

- All classes are delivered online

Course Duration:

- 2-hour classes over 4 consecutive days for a total of 8 hours

Who Should Attend:

- Users needing to understand project and task planning in PSA

Pre-Requisites:

- Preferably having basic experience with PSA in general

Registration:

- See **Pricing** below
- June 14-17 | [Register Here](#)

What's Needed to Attend:



Each participant will get access to a dedicated Learning Environment for completing class exercises. Participants need to have a laptop/computer, Internet and phone connection. Though optional, it's recommended to have another device to follow along.

Pricing:

2021 UPLAND PSA VIRTUAL TRAINING :: PRICING OPTIONS		EARLY-BIRD PRICING ENDS
EARLY-BIRD First Attendee 20% Off Standard Pricing	USD \$1,280	DECEMBER 18th Fundamentals of Upland Analytics :: Jan 25 th FEBRUARY 19th Fundamentals of OBS & WBS :: Mar 22 nd MARCH 19th Fundamentals of T&E + Billing :: Apr 19 th APRIL 9th Fundamentals of Resource Management :: May 10 th MAY 14th Fundamentals of Project Management :: Jun 14 th AUGUST 6th Fundamentals of Upland Analytics :: Sep 7 th SEPTEMBER 17th Fundamentals of OBS & WBS:: Oct 18 th NOVEMBER 5th Fundamentals of T&E + Billing :: Dec 6 th
EARLY-BIRD Second+ Attendee 15% Off First Early-Bird Attendee	USD \$1,088	
STANDARD First Attendee	USD \$1,600	
STANDARD Second+ Attendee 15% Off First Attendee	USD \$1,360	

Registration:

DATE at 9:30-11:30 AM EST | 2:30-4:30 PM GMT/BST

Register at | <https://info.uplandsoftware.com/PSA-2021-WBN-Fundamentals-of-PSA-Registration.html>

June 14th-17th, 2021