



# Fundamentals of Resource Management for PSA Virtual Training

## 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 and plan Resources for projects in Upland PSA through the different modules and accommodate the various roles involved. You will also receive an official Certificate of Completion at the end of the course.

### Course Objectives:

- Navigating the Work Plan, which is the Resource Management platform, available across the various modules in Upland PSA.
- Understanding the Roles and Skills components that support the Resource Management module
- Understanding the Features and Functionalities in creating and managing Resource Bookings and Allocations in Upland PSA and UPP.
- Creating and leveraging a Project Template with a Work Plan in Upland PSA.
- Completing Project and resource planning in UPP.
- Monitoring and managing availability of resources.
- Assigning resources to a project by finding best matches.
- Shifting and expanding/shrinking resource allocations.
- Using Out-of-the-Box Resource Management reports.
- Creating a Resource Management report.pl

### Delivery Method:

- All classes are delivered online

### What's Needed to Attend:

### Course Duration:

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

### Who Should Attend:

- PSA users needing to understand planning and forecasting resources for a project

### Pre-Requisites:

- Preferably having basic experience with PSA in general

### Registration:

- See **Pricing** below
- May 10-13 | [Register Here](#)



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
<b>EARLY-BIRD   First Attendee</b> 20% Off Standard Pricing	USD \$1,280	<b>DECEMBER 18<sup>th</sup></b>   Fundamentals of Upland Analytics :: Jan 25 <sup>th</sup> <b>FEBRUARY 19<sup>th</sup></b>   Fundamentals of OBS & WBS :: Mar 22 <sup>nd</sup> <b>MARCH 19<sup>th</sup></b>   Fundamentals of T&E + Billing :: Apr 19 <sup>th</sup> <b>APRIL 9<sup>th</sup></b>   Fundamentals of Resource Management :: May 10 <sup>th</sup> <b>MAY 14<sup>th</sup></b>   Fundamentals of Project Management :: Jun 14 <sup>th</sup> <b>AUGUST 6<sup>th</sup></b>   Fundamentals of Upland Analytics :: Sep 7 <sup>th</sup> <b>SEPTEMBER 17<sup>th</sup></b>   Fundamentals of OBS & WBS:: Oct 18 <sup>th</sup> <b>NOVEMBER 5<sup>th</sup></b>   Fundamentals of T&E + Billing :: Dec 6 <sup>th</sup>
<b>EARLY-BIRD   Second+ Attendee</b> 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>**

May 10th-13th, 2021