KANTATA™

the new name for **Mavenlink** | **Kimble**

OX eLearning Course Catalog

Training Resources, Courses, and Learning Paths

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Overview of Training Offerings

As an account member, a variety of training offerings and modalities are available including:

- On Demand Documentation

- On Demand Video Library

- Self-Paced eLearning Courses

- Live Training Sessions

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FREE Training Resources

The following resources are available for FREE to all account members:

➜   **Fundamentals Course** - This two-hour foundational course is recommended as a starting place for all account members. The Fundamentals course is appropriate for all new account members and project collaborators, and is a recommended prerequisite before beginning any other product training courses.

➜   **Video Library** - This searchable video library includes 90+ bite size on-demand videos with overviews of main features and functionality, as well as how-to's to guide you though key processes.

➜   **Knowledge Base** - This searchable database includes on-demand documentation on product features and functionality.

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Product Training eLearning Courses

The following product training eLearning courses are available a la carte, as part of a Role Based Track, or as part of the All Access Pass. Click on the title of each course to learn more and enroll.

- [Creating New Projects, Managing Project Settings, and Configuring Project Permissions](#)
- [Building Project Templates and Refining Your Work Breakdown Structure](#)
- [Leveraging Hour Types - Allocated, Scheduled, and Estimated Hours](#)
- [Identifying Project Needs & Setting Resource Demand](#)
- [Resource Center Overview](#)
- [Project Workspace Management & Performance Monitoring](#)
- [Reporting Basics](#)
- [Time & Expense Tracking and Approvals](#)
- [Project Financials - Accounting, Invoicing, and Receiving Payments](#)
- [Making Resource Requests & Recommendations](#)
- [Managing and Leveraging Skills](#)
- [Monitoring Resource Availability and Project Pipeline for Staffing Needs](#)
- [General Account Configuration and Customization](#)
- [Custom Fields & Common Use Case Scenarios](#)
- [People Management: Managing Account Members & Permissions](#)

Estimated Duration: ~1-2 hours   *A la Carte Cost:* $75

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Overview of Role Based eLearning Tracks

eLearning Tracks are available for Project Management, Resource Management, and Account Administration. Each role-based track consists of a selection of courses designed to get you comfortable with leveraging Kantata. The track is designed to provide you with content specific to your role and responsibilities.

The **Project Management Track** is helpful for project managers, account managers, consultants, project leads, implementation managers, and delivery leadership.

The **Resource Management Track** is helpful for traffic managers, resource coordinators, directors, portfolio managers, and delivery managers. This track can also be valuable for project managers to have visibility into the full resource management process.

The **Account Administration Track** is helpful for operations directors, senior managers, and supervisors who are responsible for setting up and maintaining Kantata, as well as providing internal ongoing support and guidance on Kantata usage.

Estimated Duration: ~5-7 hours   *Cost:* $400*   *Enrollment Links:* *Role Based Tracks*

Note: *If you are interested in enrolling a group of account members in the All Access Pass, please contact your Client Success Manager to inquire about group pricing options.*

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Project Management eLearning Track

Overview

As a project manager, you play the lead role in planning, executing, monitoring, controlling, and closing projects for your organization. The entire project scope, team, and success rest with you. Being able to track your project's performance in real time, knowing exactly what resources you need to execute your project, and predicting the likelihood of achieving your project goals are key to your success.

The **Project Management Track** courses cover everything from creating a new project workspace or an estimate for a new project, to monitoring the project and your team's performance and creating reports for leadership.

Learning Goals

In this track, you will learn how to:

→ Create projects in alignment with your organizational processes and configure project settings and permissions

→ Build templates with repeatable work breakdown structures to streamline project setup and ensure process and data consistency and reliability

→ Identify project staffing needs and leverage Kantata's resource planning features to request and update project staffing

→ Manage project performance and leverage performance indicators to proactively identify when a project is at risk

→ Leverage reporting and analytics to identify opportunities to increase efficiency in projects, resources, and financial performance

Audience

The Project Management Track is for any account members responsible for creating and managing projects, tasks, and resources, and achieving client satisfaction by meeting goals for project budgets, timelines, and overall project delivery. These courses are helpful for project managers, account managers, consultants, project leads, implementation managers, and delivery leadership.

Courses Included

- Creating New Projects, Managing Project Settings, and Configuring Project Permissions

- Building Project Templates and Refining Your Work Breakdown Structure

- Leveraging Hour Types - Allocated, Scheduled, and Estimated Hours

- Identifying Project Needs & Setting Resource Demand

- Resource Center Overview

- Project Workspace Management & Performance Monitoring

- Reporting Basics

- Time & Expense Tracking and Approvals

- Project Financials - Accounting, Invoicing, and Receiving Payments

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Resource Management eLearning Track

Overview

As a resource manager, your primary goal is to ensure your organization has the proper capacity to meet your project demand. Day to day, you play a game of resource "tetris" assigning people to projects based on a variety of criteria including role, skillset, previous experience, availability, location, and department. Additionally, you maintain a capacity forecast to stay ahead of staffing constraints.

The **Resource Management Track** courses cover everything from how to make sure you have the right people on the right projects to monitoring capacity to support upcoming projects and project future staffing needs. Each course is designed to help you make the best business decisions possible for your organization, team, and clients.

Learning Goals

In this track, you will learn how to:

→ Leverage Kantata to optimize your organization's resource management process and improve utilization of resource and project margins

→ Monitor resource demand, manage supply for future projects, make informed staffing decisions and improve visibility for key decision makers

→ Manage team member's skills and ensure the right resources are allocated to the right projects

→ Tap into reporting analytics to identify opportunities to increase efficiency in your projects, resources, and financial performance

Audience

The Resource Management Track is for any account members responsible for staffing projects, monitoring capacity needs and constraints, and optimizing project performance by having the right combination of resources and skills for each project. These courses are helpful for traffic managers, resource coordinators, directors, portfolio managers, and delivery managers. These courses can also be valuable for project managers to have visibility into the full resource management process.

Courses Included

- Resource Center Overview
- Leveraging Hour Types - Allocations, Scheduled, and Estimated Hours
- Making Resource Requests & Recommendations
- Managing and Leveraging Team Member Skills
- Custom Fields & Common Use Case Scenarios
- Reporting Basics
- Monitoring Resource Availability and Project Pipeline for Staffing Needs

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Account Administration eLearning Track

Overview

As an account administrator, your goal is to ensure your organization is leveraging Kantata functionality in alignment with your business goals and objectives. You are responsible for general account setup and maintenance, managing functionality, ensuring that projects are set up to deliver useful data and information, as well as conducting operational reviews to ensure usage in compliance with organizational policy.

The **Account Administration Track** courses cover everything from how to manage general account settings and customizations to conducting operational reviews and audits and reporting back to leadership. Each course is designed to help you make the best business decisions possible for your organization, team, and clients.

Learning Goals

In this track, you will learn how to:

➔ Maintain general account settings and customizations for your organization

➔ Manage internal and external account members, permissions, skills and roles

➔ Build templates with repeatable work breakdown structures to streamline project setup and ensure process and data consistency across your organization

➔ Tap into reporting analytics to identify opportunities to increase efficiency in your projects, resources, and financial performance

Audience

The Account Administration Track is for those responsible for managing the operations of Kantata and developing scalable processes for services operational success. These courses are helpful for operations directors, senior managers, and supervisors who are responsible for setting up and maintaining Kantata as well as providing internal ongoing support and guidance on Kantata usage.

Courses Included

● General Account Configuration and Customization

● Custom Fields & Common Use Case Scenarios

● People Management: Managing Users & Permissions

● Managing and Leveraging Team Member Skills

● Creating New Projects, Managing Project Settings, and Configuring Project Permissions

● Hour Types - Allocations, Scheduled, and Estimated Hours

● Building Reusable Templates & Refining Your Work Breakdown Structure

● Reporting Basics

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Advanced Technical eLearning Courses

- [Smart Upload Manager](#)

  Estimated Duration: *2 hours*   *Cost:* *$150*

- [Salesforce Integration](#)

  Estimated Duration: *2 hours*   *Cost:* *$150*

- [Data Loader](#)

  Estimated Duration: *2 hours*   *Cost:* *$150*

- [Quickbooks Integration](#)

  Estimated Duration: *4 hours*   *Cost:* *$350*

- [Application Programming Interface (API) Usage and Best Practices](#)

  Estimated Duration: *10 hours*   *Cost:* *$500*

- [Insights eLearning Course](#)

  Estimated Duration: *12 hours*   *Cost:* *$1,000*

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Best Practices eLearning Courses

- [Setting a Professional Services Organization Up for Success](#)
  Estimated Duration: 2 hours   Cost: $350

- [Change Management Best Practices](#)
  Estimated Duration: 2 hours   Cost: $350

- [Resource Management Best Practices](#)
  Estimated Duration: 2 hours   Cost: $350

- [Project Management Best Practices](#)
  Estimated Duration: 2 hours   Cost: $350

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eLearning All Access Pass

The All Access Pass is the perfect solution for those account members who want to master it all, and for organizations who want to prepare for changes in the roles and responsibilities in their organization. The All Access Pass includes a years worth of access including:

→ **All of the Product Training eLearning Courses**

→ **All of the Industry Best Practices eLearning Courses**

→ **All of the Advanced Technical Training eLearning Courses**

Cost: *Contact your Client Success Manager for pricing and enrollment information.*

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Product Certifications

The Kantata OX Product Certifications demonstrate a level of mastery in the foundational practices and applications of the Kantata OX solution. Completing these certifications shows employers that you have the knowledge and skills to support organizational needs, and demonstrates your dedication to building a career in the professional services industry. Completing a certification awards a Credly badge for your resume.

The **Project Management Certification** is for project managers, account managers, consultants, project leads, implementation managers, and delivery leadership.

The **Resource Management Certification** is for traffic managers, resource coordinators, directors, portfolio managers, and delivery managers.

The **Account Administration Certification** is for operations directors, senior managers, and supervisors who are responsible for setting up and maintaining Kantata.

The **Product Expert Certification** is for those who have mastered all of the core product functionality and best practices across project management, resource management, and account administration roles.

The **Insights Certification** is for those who have mastered dynamic and classic Insights and who have experience with the Advanced Editor and custom metric creation with MAQL.

Estimated Duration: *1-2 hours* **Enrollment Links:** *Certifications* **More Info:** *FAQs*

Cost: *Role Based - $150 | Product Expert & Insights - $250*

Note: *Before taking the certification exams, we recommend you review the corresponding eLearning courses.*

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