



Introduction to Open Workbench

Project Portfolio Consulting Group (PPCG) offers beginner and advanced training on all CA Clarity modules and capabilities.

INTENDED AUDIENCE

Introduction to Open Workbench is designed for Project Managers and Project Support Office staff that will be using Open Workbench in conjunction with Clarity to plan, schedule and control projects.

COURSE GOAL

To learn the basic functionality of Open Workbench in order to build, schedule and control a project in the CA Clarity environment.

PREREQUISITES

Some formal project management training, preferably reinforced by practical experience in planning and controlling a project.

OBJECTIVES

Upon successful completion of the course, the participant will be able to:

- Create a project plan by entering a Work Breakdown Structure, defining dependencies, and assigning resources and estimates in Workbench.
- Understand the interaction between Workbench and Clarity in terms of resource management.
- Create a realistic schedule based on typical project constraints.
- Understand the role of Clarity Timesheets in the tracking and control cycle.
- Review and analyze a plan which has been tracked using Clarity Timesheets.
- Re-plan and reschedule the analyzed plan ensuring that the plan is kept up-to-date.

COURSE STYLE AND CONTENT

This course is designed as demonstrations and discussions followed by structured exercises for each subject. This gives each participant an opportunity to practice what they've just learned, and encourages them to apply this understanding to real-world project plans.

DURATION

Two days. The class starts at 9:00 a.m. and finishes at approximately 4:30 p.m. with a break for lunch. Prompt arrival is essential.

MAXIMUM CLASS SIZE

Class size is limited to 10 participants with one Instructor. Each participant must have their own workstation.

RELATION TO OTHER COURSES

For Project Managers and Project Office staff who need to produce detailed analysis from their plans and extend their knowledge of Open Workbench across multiple projects & programs, the course *Advanced Open Workbench* is an appropriate next step.

TRAINING SETUP REQUIREMENTS

- All workstations must meet the following minimum requirements: 256 MB Memory with 40 MB free hard disk space. Operating System must be Windows 2000, Windows 2003 Server, or Windows XP. Instructor's workstation must have Microsoft PowerPoint installed.
- Customer will provide a projection device capable of displaying Instructor's workstation, plus flip charts and markers.
- PPCG will provide projects, views and instructions needed for classroom setup.
- Customer will be responsible for installing Open Workbench, Sun Java Runtime Environment (JRE), and the PPCG-supplied training files on each computer in the classroom at least one day prior to the start of class.
- Training will utilize "standard" Open Workbench with external project files (.rmp files). No access to Clarity is required during class.



COURSE PROGRAM

Introduction to Open Workbench

Introduction

- Objectives & Prerequisites
- Project Management Processes

Getting Started

- Accessing Open Workbench
- Setting Options
- Opening Projects
- Navigating
- Properties
- Highlights

Using Views

- Using Standard Views
- Customizing Views
- Formatting Data Elements
- Using Level of Analysis
- Creating Filters
- Creating View Groups
- Saving Views

Initiation

- Project Initiation in Clarity
- User Rights
- Case Study
- Project Properties

Activity Planning

- Entering WBS Data
- Entering Task Details
- Copy/Paste
- Creating Task Dependencies

Resource Planning

- Allocating Resources in Clarity
- Resource Properties
- Resource Calendars
- Assigning Resources to Tasks

Schedule Development

- Using Autoschedule
- Critical Path Method
- Autoscheduling the Project

Refining the Schedule

- Adding Named Resources
- Transferring Assignments
- Resource Holidays
- Fixed Duration
- Locking Tasks for Scheduling
- Applying Duration Types
- Applying Loading Patterns
- Baselining the Plan

Executing

- The Tracking Cycle
- Reviewing Pending Actuals
- Reviewing Actuals
- Handling Pending Estimates
- Updating Status
- Completing the Tracking Cycle

Controlling

- Analyzing Progress
- Unplanned Tasks
- Variance Analysis
- Replanning

Multiple Projects

- Creating Master Projects
- Creating External Dependencies

FOR FURTHER INFORMATION

Project Portfolio Consulting Group LLC
West End, NC 27376
Phone: (888) 813-0444
info@ppcg.net
www.ppcg.net