



Managing Projects with CA Clarity PPM

Project Portfolio Consulting Group offers beginner and advanced training on all CA Clarity™ PPM modules and capabilities.

INTENDED AUDIENCE

Managing Projects with CA Clarity PPM is designed for Project Managers who will be using the Clarity interface to plan, manage and control projects.

COURSE GOAL

To be able to utilize the project planning and control capabilities of CA Clarity PPM.

PREREQUISITES

This course requires working knowledge of CA Clarity PPM v8.0 or higher, including navigation of the user interface.

OBJECTIVES

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

- Create a Project in CA Clarity PPM using a Template or Shell.
- Create a Project Team, Manage Allocations and Estimates.
- Create and Manage Project Issues, Risks and Action Items.
- Understand the Project Budget and Forecast capabilities of Clarity.
- Manage the Collaboration features of CA Clarity PPM.
- Understand the Project Control features of CA Clarity PPM.
- Run Project Manager Reports and Portlets.
- Use the Program Management Features.

COURSE STYLE AND CONTENT

This course is designed as demonstration and discussion 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 their understanding to real-world project management challenges.

DURATION

Two days.

MAXIMUM CLASS SIZE

Class size is limited to 15 participants with one Instructor. Each participant must have their own workstation.

RELATION TO OTHER COURSES

For Project Managers who manage resources and project allocations for their organization, the course: *Managing Resources with CA Clarity PPM* is a logical next step.

For Project Managers who utilize Open Workbench to support detailed project scheduling, the course: *Introduction to Open Workbench* is recommended.

TRAINING SETUP REQUIREMENTS

- All computers must meet the following minimum requirements: 1 GHz Pentium III with 512 MB Memory and 40 MB free space (for course files). Operating System must be Microsoft Windows 2000 Professional SP4, Windows XP Professional SP2, or Windows Vista. Supported browsers include Internet Explorer 6.0 SP1 (or higher) and Firefox 2.0 (or higher). Instructor's computer must have Microsoft PowerPoint installed.
- If PPCG is hosting the training environment, a URL will be provided to Client. Access to the URL from within the Client's classroom must be tested in advance of class.
- If Client is hosting the training environment, a URL along with Administrative access must be provided to PPCG one week prior to class. This will be used to test the environment.
- If Client is hosting the training environment, Client and PPCG will mutually determine who is responsible for creating User IDs for the students.



COURSE PROGRAM

Managing Projects with CA Clarity PPM

Clarity and Project Management

- Gain an understanding of what Clarity is and the modules contained within the application
- Preview Clarity Project Management Terms and Definitions
- Review basic functionality and navigation

Defining a Project

- Create a new project
- Access, examine and update project properties:
 - Main
 - Schedule
 - Budget
 - Dependencies
 - Sub-projects
 - Financials
 - Baseline
- The Dashboard Tab

Building a WBS

- The Task List
- Resource Utilization
- Work Breakdown Structure
- Assignments
- Examine the WBS of a project
- Add Tasks and Milestones
- The Task Dialogue Box
- Organize Tasks on the Plan
- Discuss Forms

Building a Team and Staffing the Project

- Build a Team for your project
- Examine project staff properties
- Assign resources to tasks
- Enter Estimates to Complete for the resources
- Discuss Participants and Participant Groups
- Discuss Replacing a Resource

Issue, Risk and Change Management

- Discuss Issues, Risks and Change Requests
- Create a Risk
- Learn how Issues, Risks and Change Requests interact

Project Collaboration

- Discuss and Create an Action Item
- Discuss Document Manager
- Discuss the Project Calendar
- Discuss Project Discussion Threads
- Processes

Financial Planning: Budgets and Forecasts

- Setup Financial planning for your project
- Create a Budget and Forecast for your project
- Discuss revisions to Budgets and Forecasts
- Creating from Staff Plan

Controlling a Project

- Discuss Autoschedule
- Schedule your project
- Baseline the plan
- Discuss Tracking Actuals
- Discuss Analyzing Progress
- Closing a Project

Program Management

- Learn the difference between a Program and a Project
- Build a Program

Reporting and Analysis

- Accessing and Running Clarity Reports
- Download and Review a Report

FOR FURTHER INFORMATION

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