



Managing Resources with CA Clarity PPM

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

INTENDED AUDIENCE

Managing Resources with CA Clarity PPM is designed for Resource Managers as well as Project Managers and members of the PMO who perform a resource management role.

COURSE GOAL

To understand how the Resource Management module of CA Clarity PPM can be utilized to support a resource management process.

PREREQUISITES

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

OBJECTIVES

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

- Manage Resources and Roles.
- Manage Role Allocations for a Project.
- Manage a “Named Resource” Allocation for a project.
- Use the Resource Finder.
- Understand Resource Requisitions: Formal and Informal.
- Request Named Resources.
- Manage Over-Allocation.
- Understand and be able to use the Clarity Capacity Planning and other Resource Portlets.
- Use Resource Management Reports.

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 resource management challenges.

DURATION

One Day. 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 15 participants with one Instructor. Each participant must have their own workstation.

RELATION TO OTHER COURSES

For Resource Managers who also manage projects, the course: *Managing Projects with CA Clarity PPM* 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.
- Customer will provide a projection device capable of displaying Instructor’s computer, plus flip charts and markers.
- If PPCG is hosting the training environment, a URL will be provided to the 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 OUTLINE

Managing Resources with CA Clarity™ PPM

Introduction

- Objectives and Prerequisites
- Introduction to Clarity Resource Management
- Resource Management Links
- Terms and Definitions
- Access Rights

Managing Resources and Roles

- Accessing Resources / Roles
- Searching and Filtering
- Accessing the Resource Record
- Creating a Resource
- Creating a Role

Allocations and Staffing Options

- Allocation Overview
- Staffing Options
- Quick Staffing
- Resource Requisitions
- The Team Tab: Staff
- Resource Properties

Using Resource Finder

- Using Resource Finder
- Booking a Resource
- Replacing a Resource / Role
- Locate and Booking

Resource and Capacity Planning

- Resource Planning
- Resource Planning Portlets
- Capacity Planning

Reporting and Analysis

- Accessing and Running Clarity Reports
- Reports vs. Portlets

FOR FURTHER INFORMATION

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