

Clarity™ PPM Administration

Three Day Workshop

Learning



Instructor Led Training Version – Classroom or Online

Digital Celerity offers innovative training on all CA Clarity™ PPM modules and functionality

INTENDED PARTICIPANTS

The Clarity PPM Administration, three day workshop course is designed for Clarity Administrators and Project Management Office/PMO members who leverage CA Clarity PPM to support end-users, and other members of the PMO.

COURSE GOALS

The primary objective of this 3 day workshop is to provide an overview of Clarity administrative functions for the purpose of enhancing and refreshing the existing knowledge of those who administer the application. This course does not include advanced Clarity PPM technical training topics available from Digital in a separate course.

- Understand the Clarity security model
- Create a user group with multiple types of rights
- Understand the Studio role to create or edit objects, sub-objects and their attributes
- Setup and Configure Audit Trails
- Create and edit OBS structures
- Create and setup a Project
- Understand and configure Data Administration Settings
- Setup and Configure Auto-numbering
- Understand and configure the Project Management Settings
- Understand and configure the General Settings

COURSE PREREQUISITES

This workshop intensive course is best leveraged for enhancing and refreshing the existing knowledge of those who administer the Clarity PPM application. Therefore some Clarity PPM administration experience is anticipated.

For more information or to schedule a course email us at: sales@digitalcelerity.com or call (408) 812-9999

COURSE DURATION

Three Day ILT – Workshop. The class starts at 9:00 a.m. and finishes at approximately 4:30 p.m. with a break for lunch.

MAXIMUM CLASS SIZE

Class size is limited to 6 participants with one Instructor. Each participant should have their own workstation.

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, or Greater (Windows 7). Supported browsers include Internet Explorer and Firefox.
- Digital Celerity provides course manuals, training data & instructions for classroom setup.
- Client will be responsible for installing, Sun Java Runtime Environment (JRE), and the Digital Celerity-supplied training files on each computer in the classroom at least one day prior to the start of class.
- Course participants must have access to the Clarity PPM Application Administration Tool.

COURSE STYLE AND CONTENT

This course is designed to incorporate collaborative workshops, demonstrations and discussions followed by structured exercises for each subject. This provides participants the opportunity to practice what they learn and successfully apply best practice knowledge to real-world Clarity PPM Administration tasks, and objectives.

Clarity PPM Administration – Workshop Course Curriculum

1 1 Introduction

2 2 Clarity Security Model

- 2.1 Security Overview
- 2.2 User Set-Up
- 2.3 Rights Based Security
- 2.4 Types of Security /Rights
- 2.5 Inherent Rights (Auto)
- 2.6 Groups
- 2.7 OBS Security Rights
- 2.8 Instance Rights
- 2.9 Conditional Views (Building Display Conditions)
- 2.10 Securing Sub-Objects (Sub-pages)
- 2.11 Rights - Access Levels
- 2.12 Determining Security Requirements – Tools to Use
- 2.13 Rights Matrix (Security Matrix Spreadsheet)
- 2.14 Minimizing Administration & Maintenance
- 2.15 Exercise 1 - Creating a New Rights Group
- 2.16 Exercise 2 – Adding Rights to a Group
- 2.17 Exercise 3 – Adding Resources to a Group
- 2.18 Quiz #1 - Security Model

3 3. Studio

- 3.1 Studio Overview
- 3.2 Objects
- 3.3 Attributes
- 3.4 Data types
- 3.5 Lookups
- 3.6 Calculated Fields (Attributes)
- 3.7 Time Varying
- 3.8 Views: Layout

- 3.9 Audit Trail
- 3.10 Exercise 4: Creating a new Lookup
- 3.11 Exercise 5: Creating a new Attribute (“Lookup” data type)
- 3.12 Exercise 6: Add new Attribute to Project Object
- 3.13 Explore/ Demo: Instructor Explore Studio
- 3.14 Quiz #2 – Studio

4 4. Organizational Breackdown Structure (OBS)

- 4.1 OBS Overview
- 4.2 OBS Components
- 4.3 Access by OBS Association
- 4.4 Financial Setup
- 4.5 Datamart
- 4.6 Exercise 7: Creating a geographical OBS
- 4.7 Quiz #3 – OBS

5 5. Project Setup

- 5.1 Non-Project Investment Objects (NPIOs)
- 5.2 Project (Investments) Initiation (From the Admin Guide)
- 5.3 Setting up a New Project (Investment) in Clarity
- 5.4 Project Types / Templates
- 5.5 Current Procedure
- 5.6 Add Staff to Project
- 5.7 Add Participant to Project Collaboration
- 5.8 Exercise 8 – Creating a new project
- 5.9 Exercise 9: Creating an Audit Trail

6 6. Project Management Menu Group

- 6.1 Timesheet Options
- 6.2 Time Reporting Periods
- 6.3 Charge Codes
- 6.4 Input Type Codes
- 6.5 Transactions Log
- 6.6 Settings
- 6.7 Base Calendars
- 6.8 Risk Settings
- 6.9 Datamart Settings

- 6.10 Time Slices
- 6.11 Auto-Numbering
- 6.12 Exercise 10 – Creating new auto-numbering Scheme
- 6.13 Reports and Jobs
 - 1.1.1 Reports Tab
 - 1.1.2 Jobs Tab
- 6.14 Skills Hierarchy
- 6.15 Processes
- 6.16 System Options



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