

Financial Management with CA Clarity™ PPM – 1 Day ILT



Instructor Led Training (ILT), Online Virtual ILT & Self-Paced, Computer Based Training Versions by Digital Celerity LLC

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

INTENDED PARTICIPANTS

Financial Management with Clarity PPM - Fundamentals is designed for Project Managers, Project Management Office members and Financial Analysts who use Clarity Financials to create Cost Plans and Budgets.

COURSE GOALS

To provide a base competency in Clarity Financials as used in the Clarity PPM application to provide the ability to analyze investment performance against planned costs and budgets.

COURSE PREREQUISITES

This is an introductory course, although it is recommended that participants have some experience with project management concepts, as well as a base in their enterprise financial analysis requirements.

COURSE OBJECTIVES

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

- Define Financial Management in CA Clarity
- Define the Flow of Data Through the Financial Module
- Setup Financial Definitions
- Financially enable Companies, Resources and Projects
- Define Matrices
- Process Financials
- Create a Financial Plan

COURSE DURATION

One Day ILT. 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 10 participants with one Instructor. Each participant should have their own workstation. Optional Instructor's assistant is available to accommodate up to 15 participants (additional cost applies).

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 2003 Professional SP3, or Greater (Windows 7). Supported browsers include Internet Explorer and Firefox.
- Digital Celerity provides projects & instructions for classroom setup.
- Client will be responsible for installing the Digital Celerity-supplied training files on each computer in the classroom at least one day prior to the start of class.

COURSE STYLE AND CONTENT

This course is designed to incorporate collaborative demonstrations and discussions followed by the opportunity to ask questions relative to the specifics of the student environment. This provides participants the ability to place what they learn into the context of their real-world project plans and financial requirements.

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

Clarity Financial Management Course Curriculum

1 Introduction

1.1 Course Objectives

2 Financial Management Overview

3 Financial Setup & Enablement

3.1 Financial Organizational Structure

3.2 Administrative Setup

3.3 Financial Enablement

4 Project Financial Planning

4.1 Rate Matrix

4.2 Forecasts/cost Plans

4.3 Budgets

5 Financial Transactions & Processing

5.1 Financial Transactions Workflow

5.2 Non Labor Transactions

5.3 Financial Transaction Processing