

Using Open WorkBench with Clarity™ PPM

Two Day Fundamentals

Learning



Instructor Led Training (ILT) Version

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

INTENDED PARTICIPANTS

Using Clarity PPM with Open Workbench - Comprehensive is designed for Project Managers and Project Management Office members who will leverage Open Workbench with CA Clarity PPM to schedule and control projects and programs.

COURSE GOALS

To ensure knowledge is transferred to support scheduling and analysis challenges leveraging Clarity PPM with Open WorkBench best practices.

COURSE PREREQUISITES

This is an introductory course, though it is recommended that participants have some experience with managing projects, and building and maintaining projects schedules. Completion of Digital Celerity's Projects and Resource Management with Clarity PPM CBT is recommended.

COURSE OBJECTIVES

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

- Add Resources to the Project Team using Clarity PPM.
- Launch Open WorkBench from Clarity PPM.
- Edit the Work Breakdown Structure (WBS), define dependencies, and assign resources with estimates in Open WorkBench.
- Create a Project Schedule
- Use Auto-schedule
- Refine the Project Schedule
- Monitor and Control the Project Schedule
- Develop customized views and highlights that allow you to more effectively read, analyze, and report project information.

COURSE DURATION

Two 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 2000 Professional SP4, or Greater (Windows 7). Supported browsers include Internet Explorer and Firefox.
- Digital Celerity provides projects, OWB views & instructions for classroom setup.
- Client will be responsible for installing Open Workbench, 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.
- Training will utilize "standard" OWB with external project files (.rmp files).

COURSE STYLE AND CONTENT

This course is designed to incorporate collaborative 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 project plans and management.

For more information or to schedule a course email us at:

sales@digitalcelerity.com or (408) 812-9999

Using Open WorkBench Course Curriculum

1 Introduction

- 1.1 Course Goal
- 1.2 Course Objectives
- 1.3 Course Prerequisites
- 1.4 Course Duration:

2 Project Planning in Clarity PPM

- 2.1 The Clarity -- Open Workbench Integration
- 2.2 Clarity Logon
- 2.3 Navigating Clarity Project Planning
 - 2.3.1 Overview Page and General Tab
 - 2.3.2 Projects Page
 - 2.3.3 Project Properties Page
 - Project Properties: Main Page
 - Project Properties: Team Tab
 - Project Properties: Tasks Tab and the Work Breakdown Structure Section
 - Properties: Tasks Tab and the Task List Section
 - Timesheet Page
- 2.4 Exercise 1: Adding Project Staff

3 Using Open Workbench Best Practices

- 3.1 Opening Open Workbench
 - 3.1.1 From the Clarity User Interface
 - 3.1.2 From the Start Menu
- 3.2 Navigating Workbench
- 3.3 Working with Groups and Views
- 3.4 Using Views
 - 3.4.1 Adding a Column
 - 3.4.2 Adding a Data Field
 - 3.4.3 Deleting a Column
 - 3.4.4 Formatting a View

- 3.4.5 Changing the View Time Scale
- 3.4.6 Saving a Modified or Edited View as a New View
- 3.5 Using the View Library
 - 3.5.1 Creating New Folders
 - 3.5.2 Adding Views
 - 3.5.3 Removing Views
- 3.6 Views Highlights
- 3.7 Exercise 2: View Navigation
- 3.8 Setting Workbench Options
 - Options: General Tab
 - Options: Default Tab
 - Options: Location Tab
 - Options: WBS TabOptions:
 - Display Tab

4 Project Properties and the Work Breakdown Structure

- 4.1 Managing Project Properties in Workbench
 - Project Properties: Description Tab
 - Project Properties: Scheduling Tab
 - Project Properties: Resources Tab
 - Project Properties: Key Tasks Tab
 - Project Properties: Advanced Tab
 - Project Properties: Notes Tab
- 4.2 Modifying the Work Breakdown Structure
 - 4.2.1 Inserting Lines
 - Inserting a Line Using the Menu
 - Inserting a Line Using the Insert Button
 - 4.2.2 Deleting Line Items
 - Deleting a Line Using the Menu
 - Deleting a Line Using the Delete Button
 - 4.2.3 Moving Line Items
 - Cutting and Pasting Data
 - Copying and Pasting Data
 - Using the Paste Special Command

- 4.3 Working with Task Properties
 - Modifying Task Properties
 - Task Properties: General Tab
 - Task Properties: Resources Tab
 - Task Properties: Dependencies Tab
 - Task Properties: Advanced Tab
 - Task Properties: Notes Tab
- 4.4 Exercise 3: Creating the Work Breakdown Structure

5 Task Dependencies

- 5.1 Dependency Types
- 5.2 Dependency Lag
- 5.3 Creating Dependencies
 - 5.3.1 Entering Task Dependencies in a Spreadsheet View
 - Creating a Dependency between Tasks and Milestones
 - Creating Multiple Successors for a Task or Milestone
 - Creating Multiple Predecessors for a Task or Milestone
 - Creating a Chain of Dependencies
 - 5.3.2 Entering Task Dependencies in the Task Properties Window
 - 5.3.3 Entering Task Dependencies in the Gantt View
 - 5.3.4 Entering Task Dependencies in the CPM Network View
 - 5.3.5 Editing Task Dependencies
 - 5.3.6 Deleting Task Dependencies
 - 5.3.7 Changing the Dependency Type
- 5.4 Exercise 4: Task Dependencies

6 Assigning Resources and Roles to Tasks

- 6.1 Assigning Resources in Open Workbench
 - 6.1.1 Assigning Resources Using a Spreadsheet View
 - Assigning a Resource to a Task or Milestone in a View
 - Assigning Multiple Resources to the Same Task
 - Assigning Multiple Tasks to the Same Resource
 - 6.1.2 Assigning Resources Using Task Properties
 - 6.1.3 Releasing a Resource from a Task
- 6.2 Exercise 5: Assigning Roles to a Task with ETC

7 Scheduling a Project

- 7.1 The Critical Path
 - Terms and Definitions
 - Understanding the Critical Path
- 7.2 Using Autoschedule
 - 7.2.1 How Autoschedule Works
 - 7.2.2 Following Autoschedule Rules
 - 7.2.3 Running Autoschedule
 - Backward/Reverse Autoschedule
 - Scheduling a Project from a Finish Date
- 7.3 Exercise 6: Using Autoschedule

8 Refining the Project Schedule

- 8.1 Factors Affecting the Schedule
 - 8.1.1 Fixed Duration Tasks
 - 8.1.2 Locking Task Duration and Dates
 - 8.1.3 Changing Task Priority
 - Changing the Priority
 - Setting All Tasks with the Same Priority
 - Editing Task Priority from a View Window
 - 8.1.4 Setting Task Constraints
- 8.2 Resource Loading Patterns
 - Using Loading Patterns
 - 8.2.1 Setting a Loading Pattern
 - 8.2.2 Setting a Fixed Loading Pattern
- 8.3 Exercise 7: Adjusting Loading Patterns
- 8.4 Transferring Assignments Between Resources or Roles
- 8.5 Exercise 8: Refining the Schedule – Transferring Assignments

9 Replacing Roles with Resources

- 9.1 Adding Resources Using Clarity
- 9.2 Replacing Roles with Resources in Clarity
- 9.3 Viewing Resource Properties
 - General Tab
 - Advanced Tab

Calendar Tab

Notes Tab

9.4 Exercise 9: Replacing Project Roles with Resources

9.5 Adjusting Resource ETCs

10 Baselining a Project

10.1 Setting a Baseline

10.2 Working with Multiple Baselines

10.2.1 Creating Multiple Baselines

10.3 Additional Information about Baselines in Open Workbench

10.4 Exercise 10: Baselining the Schedule

11 Controlling a Project

11.1 The Controlling Process

11.2 The Weekly Project Review

11.3 Using Custom Views for the Weekly Review

11.3.1 Reviewing Pending Actuals

11.3.2 Reviewing Actuals

11.3.3 Reviewing Pending Estimates

11.3.4 Updating Task Status

11.3.5 Updating Milestone Status

11.3.6 Handling Tasks with No ETC

11.3.7 Identifying Late Finishing Tasks

11.3.8 Identifying Tasks Scheduled to Start This Week

11.3.9 Autoscheduling After Posting

11.3.10 Reviewing Variances

11.3.11 Replanning a Project

11.4 Exercise 11: Controlling the Schedule (*Jeopardy Clarity PPM with OWB Learning Game*)

12 Course Wrap Up

12.1 Key Factors to the Successful Use of Open Workbench with Clarity PPM

The Work Breakdown Structure (WBS)

The Dependency Network

Scheduling

12.2 Conclusions