



Open WorkBench with Clarity PPM **Learning by Design**

Learning by Design – Using Open WorkBench with Clarity PPM Course Design Criteria

There are essentially two objectives in Digital Celerity's approach to Using Open WorkBench with Clarity PPM custom training for our valued clients: The 'how to' navigation and 'button pressing' associated with properly using the tool, and the 'process' part of defining the *why* and *when* certain actions need to be performed in Clarity PPM. If we take the objective of 'successfully terminating a project' for example, the checkbox to unselect is simple, but what is required to "Inactivate" a project is more complex. Case in point, if Clarity PPM Financials are activated, then a project cannot be inactivated without first closing the Financials, and if non-labor costs are imported from the ERP system via an interface, then the Financials cannot be closed until all invoices are imported into Clarity PPM. This means that the project has to be closed for time entry (another check box) prior to the project being "Inactivated".

Another significant consideration in our approach is the Access Rights granted to Project Managers. Much of what a Project Managers sees in the way of features/button, links and pages in Clarity PPM is controlled by their access rights. For example, if a Project Manager has been granted Projects – Create Right, they will see a NEW button that will then allow them to create a new project and complete the form with associated information. However, if they don't have that right assigned to them, then they never see the NEW button.

Some best practice items may cause a rethinking of the way that Clarity PPM is configured. For example, a typical Progress Reporting method is to have a Monthly/Weekly Status Report Sub-Object in the Project Object. This can replace any paper reports and the data can then be readily available for all the stakeholders in Portlets, Dashboards, and Reports.

In some cases the Project Manager may need to know and understand beyond the simple project silo. For example, in assigning resources to the project team, the utilization commitment of the resource to be added can have a significant impact on their ability to perform on the project. If the resource is 75% booked on one or several other projects, the Project Manger needs to understand how to get this information and how it will impact the project. Also, the best practice methodology of staffing with roles as placeholders on the project and then interacting with a Resource Manager who can make the final booking both simplifies the process for the Project Manager and creates a better schedule.



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Also we have to explore the Project Manager's Clarity PPM interaction with Open Workbench; What tasks are best performed within Clarity PPM and what tasks are better performed within OWB. So there will be a smooth transparent link between the two associated courses.

From an Open WorkBench training point of view, the approach also needs to consider both the skills necessary to work with OWB, and best practices and processes that drive its use. For example, an OWB course must completely address the Weekly Updating Cycle performed by the Project Manager, yet the cycle is defined by the processes of the PMO and the ability to properly update the project is contingent on the skill of the Project Manager. Understanding concepts like the effect timesheet posting has on the project, the knowledge and skill to evaluate 'Pending Actuals' and 'Pending Estimates', the ability to modify views to obtain the desired information, and the steps that need to be performed to properly update a project schedule are all critical to the monitoring and controlling of projects.

Another good example in the approach is the use of Auto-schedule. The act of Auto-scheduling is fairly simple, but understanding what is going on during Auto-scheduling and what is driving it, is critical to the success of using OWB. We typically explore the Rules of Auto-scheduling so that the mystery is lifted and the Project Manager begins to be able to predict the outcome of an Auto-schedule, and know the impacts from the Critical Path, dependencies, schedule constraints, task priorities, and the effect of subnets. Also critical in the Auto-schedule process is Auto-scheduling with Resource Constraints and Without Constraints and each has its proper use and dramatically affects the schedule.

Best practice Clarity PPM with OWB training should take into consideration change management, and adoption catalysts. Providing Clarity PPM training with OWB for organizations like yours where mandates to leverage OWB as the primary project scheduling tool were not strictly enforced in the past, naturally led to the use of other less integrated tools such as Excel Spreadsheets and Microsoft Project is most effective when complimented by an overview of the advantages of Clarity PPM with OWB over alternative tools. Effective change management and adoption catalysts such as demonstrating the differences between Microsoft scheduling tools and OWB, how OWB can help PM/RMs better manage their projects and resources while capturing essential PPM metrics for enterprise decision making can make all the difference to a company leveraging Clarity PPM.

One last important factor to mention in addressing Digital Celerity's training approach is the use of Templates to build the Work Breakdown Structure, how it can be one or several and how it can, and should be staffed with roles and include dependencies.



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Training Principles

- Digital Celerity has established the following training principles for all custom Open WorkBench with Clarity PPM courseware development:
- Have a strategic (systems thinking) learning and development strategy tied to broader organizational/business strategy and priorities.
- Establish clear and compelling training goals, objectives, and deliverables.
- Provide Excellent Instructors - Subject Matter Experts, with outstanding training delivery skills.
- Integrate Client's SDLC, policies, processes, and tools, with training content, case studies, theory and hands-on lab exercises.
- Make classes interactive and enjoyable.
- Use case studies and stories relating to course content.
- Provide favorable and unfavorable examples of project schedules.
- Stimulate Clarity PPM with OWB adoption (change) based on practical and compelling business cases resulting from real-world experience and success.

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