

Using Open WorkBench with Clarity™ PPM

Learning by Design



Instructor Led Training (ILT) Methodology

There are essentially two objectives in Digital Celerity's approach to Using Open WorkBench with Clarity PPM custom training: 1) The '**how to**' navigation and 'button pressing' associated with properly using the tool, and 2) 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 checkbox) 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.



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 OWB course point, the approach needs to also 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 Warner Bros 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.

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