

## Managing Projects with Clarity PPM

### COURSE DESCRIPTION

*Managing Projects with Clarity PPM* teaches project managers who will be using Clarity PPM how to use the project planning and control capabilities of Clarity PPM.

AUDIENCE – Project Managers

COURSE TYPE – Onsite / Online

PREREQUISITES – None

DURATION – 8:00 AM to 5:00 PM; one-hour lunch

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### COURSE OUTLINE

#### Project Management Overview

- Project Management Terms and Definitions

#### Managing Projects

- Creating Projects
- Project Templates
- Converting Ideas
- Accessing Projects
- Project List View
- Filters and Search Criteria
- Project Properties and Subpages

#### Work Breakdown Structure (WBS)

- Work Breakdown Structure
- Tasks Tab
- The Gantt View
- Create a New Task

#### Staff the Team

- The Four A's and Booking Statuses
- Typical Allocation Roles and Responsibilities
- Resource Allocation vs. ETC
- Adding Resources
- Adding Roles

#### Resource Assignments to Tasks

- What is Estimate to Complete (ETC)?
- Assigning Resources and Roles to Tasks
- Create an Assignment
- Replacing a Resource

#### Clarity PPM Autoschedule

- Autoschedule Rules and Steps
- Running Autoschedule
- Accessing other Schedulers (MSP and OWB)

#### Financial Management

- What is Financial Management
- What is a Cost Plan?
- Create a Cost Plan
- Plan of Record
- What is a Budget Plan?
- Submitting a Cost Plan to become a Budget Plan
- Budget Plan Details

#### Controlling a Project

- Baselining
- Tracking Progress
- Pending Actuals and Pending ETCs
- Updating status
- Task Closing
- Closing the project

#### Risks, Issues, and Change Requests

- Risks and Issues
- Create a Risk
- Convert a Risk to an Issue or Change Request
- Create an Issue
- Convert an Issue to a Risk or Change Request
- Change Requests

#### Program Management

- Programs vs. Projects vs. Master Subprojects
- Accessing and Creating Programs
- Adding Subprojects to Programs and Master Projects

#### Portlets and Reports

- Portlets vs. Reports
- Portlet Data – Project Dashboard Example
- Reports and Jobs