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Clarity Expertise On Demand

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Managing Resources with Clarity PPM

COURSE DESCRIPTION
Managing Resources with Clarity PPM teaches project and resource managers how to use Clarity PPM's Resource Management module to support resource management processes.

AUDIENCE – Project & Resource Managers

COURSE TYPE – Onsite / Online

PREREQUISITES – None

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

COURSE OUTLINE

Introduction
- Overview of Clarity PPM
- General Navigation
- What is Resource Management?
- Resource Management Terms and Definitions
- Roles and Responsibilities

Managing Resources and Roles
- Accessing Resources / Roles
- Creating Custom Filters
- Configure the Resource List
- Accessing the Resource Record
  - Skills
  - Allocations
  - Document Manager
  - Resource Calendar

Allocation and Staffing the Team
- The Four A's: Allocation, Availability, Assignments and Actuals
- Staffing the Team with Roles and Resources
- Update the Team Using In-Line Editing
- Examine project staff properties
- Booking Statuses
- Overview of Resource Requisitions

Using Resource Finder
- Using Resource Finder
- Resource Finder Criteria
- Replacing a Role with a Resource

Resource Planning Portlets
- Resource Planning Portlets

Time Approval
- Accessing, Reviewing and Approving Timesheets
- Timesheet Adjustments

Reporting and Analysis
- Accessing and Running Clarity PPM Reports
- Export and Review a Report