Solutions Resource Management with CA Clarity

Course Summary

Description

This course helps students to understand how Clarity Resource Manager can be utilized to support a resource management process.

Objectives

At the end of this course, students will be able to:

- Manage Resources and Roles.
- Manage Role Allocations for a Project.
- Understanding allocations and ETC's
- Manage a "Named Resource" Allocation for a project.
- Use the Resource Finder.
- Understand Resource Requisitions: Formal and Informal.
- Request Named Resources.
- Managing Over-Allocation.
- Understand and be able to use the Clarity Capacity Planning and other Resource Portlets.
- Use Resource Management Reports.

Topics

- Introduction
- Managing Resources and Roles
- Allocations and Staffing Options
- Using Resource Finder
- Resource and Capacity Planning
- Reporting and Analysis

Audience

This course is designed for is designed for Resource Managers, Team Leads, Project Managers, and PMO organizations charged with performing resource management role.

Prerequisites

This course requires working knowledge of the Clarity interface.

Duration

Two days

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Course Outline

I. Introduction
- A. Objectives and Prerequisites
- B. Introduction to Clarity Resource Management
- C. Resource Management Links
- D. Terms and Definitions
- E. Access Rights

II. Managing Resources and Roles
- A. Accessing Resources / Roles
- B. Searching and Filtering
- C. Accessing the Resource Record
- D. Creating a Resource
- E. Creating a Role

III. Allocations and Staffing Options
- A. Allocation Overview
- B. Staffing Options
- C. Quick Staffing
- D. Resource Requisitions
- E. The Team Tab: Staff
- F. Resource Properties

IV. Using Resource Finder
- A. Using Resource Finder
- B. Booking a Resource
- C. Replacing a Resource / Role
- D. Locate and Booking

V. Resource and Capacity Planning
- A. Resource Planning
- B. Resource Planning Portlets
- C. Capacity Planning

VI. Reporting and Analysis
- A. Accessing and Running Clarity Reports
- B. Reports vs. Portlets

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