

Introduction to CLARITY PPM Application Administration Classic and Modern UX

COURSE DESCRIPTION

Introduction to CLARITY PPM Application Administration is an introductory-level course designed for individuals responsible for the functional administration of CLARITY PPM

PREREQUISITES –None

AUDIENCE – Admins

COURSE TYPE – Onsite / Online

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

COURSE OUTLINE – Classic

Introduction

- Application Administration Overview

CLARITY PPM Overview

- Basic Structure Overview
- Simple Project Management
- Simple Resource Management

Resource Setup

- Resources vs. Users
- Resource/User Status and Implications

CLARITY PPM Security

- Types of Rights: Inherent, Instance, OBS, and Global
- Creating and Managing Group and OBS Security
- Object Security Available:
 - Display Conditions
 - Securing Sub-Objects
 - Securing Sub-pages
- Best Practice in Security:
 - Resource Manager
 - Project Manager
 - System Admin
 - PMO
 - Individual Contributors
- Monitoring security rights and license counts
- Exercises

Organizational Breakdown Structure (OBS)

- OBS Purpose and Use

Project Setup

- Non-Project Investments – Idea, Other Work, Applications, Products, Assets

- Idea to Project Process
- Project Creation – New and New from Template
- Creating and Managing Templates
- Exercises

CLARITY PPM Studio

- Studio Overview
- Lookups
- Object Attributes Overview
- Object Views
- Audit Trail
- Exercises

Introduction to Portlets and NSQL

- Portlet Overview
- Adding Portlets to Personal Overview Page

Ongoing Data Management

- Time Reporting Periods
- Base Calendars
- Reports and Jobs
- Time Slicing

Best Practice Support Activities

- Daily, weekly, and monthly activities for jobs, processes, logs
- Options for tracking enhancements, defects, and requests coming into a support team
- Frequently asked questions

Introduction to RegoXchange

- Available Portlets and Solutions

COURSE OUTLINE – Modern UX

System Settings

- BrandingLogin Message
- Homepage

Admin

- Attributes(Created in Classic – formatted in MUX)
 - Label – at parent level
 - Secure/Access Edit/view (groups)

Blueprints

- Copy – Edit
- Propertied – Drag and Drop

Visuals

- Project Tiles
- Modules
- Configure

Rules

- Set Rules around Target Objects
 - Projects and Ideas
 - Subobjects
- Conditions/Actions
- Disable editing record and/or attributes
- Project Creation – New and New from Template

Actions

- On-demand process

Widgets

- Using Target

Views

- Administration