

Make most of your Celoxis investment - Get trained to be a PRO

Celoxis' web based trainings are conducted by mix of PMP certified and domain experts with significant ¹ industry experience. Our training modules, comprised of slide-ware and virtual hands-on product training, have been carefully developed keeping real world complexities in mind.

 **Every module below is remotely delivered via web-conferencing tool like Gotomeeting or Webex and is available as a 60-minute virtual classroom session or a 2 hour interactive hands-on session.**

Getting Started & Basic Project Setup

- How information is organized
- Key terminologies
- Finding your way around
- Setting up your dashboard
- Views
- Creating your first project
- Understanding project states & categories
- How to get help

Project Planning & Tracking

- Creating project plan using the interactive gantt view
- Assigning, replacing resources
- Copying / moving tasks between projects
- Baseline
- Critical path
- Schedule and budget health indicators
- Keyboard shortcuts

Project Planning & Tracking (Advanced)

- Manual and automatic scheduling
- Setup task information
- Monitor task progress and update plans
- View audit trail & activity stream
- Cross project gantt

Project Setup (Advanced)

- Clone project
- Import / Export tasks and projects
- Advanced project options
- Project cost and bill rates
- Project security

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Administration

- Setup company information
- Define project categories
- Create custom fields
- Setup project and time options
- Setup time and expense codes
- Select company billing model
- Create work calendars and define public holidays
- Setup users and clients

Security

- Access Rights for User Types
- Security Concepts (Workspaces, Roles, Privileges, People)
- How security works in Celoxis
- Setting role privileges
- Setting role memberships
- Auto Assigned Roles
- Project level access control
- Reports Security

Team Collaboration

- View my tasks and update progress
- Calendar
- Conduct & participate in discussions with team and clients
- File Management
- Collaborating using activity stream
- Notification Center

Time & Expense

- Time & Expense Codes
- Time and Expense workflow
- Enter Time - Weekly Time Entry
- Enter Time - Timer
- Enter Expenses
- Approve, reject, invoice Time and Expense

Project Financials & Portfolio Management

- Task and project Budgets
- Task and project Costs
- Types of cost (Labor, Material, Fixed)
- Estimated vs actual costs
- Earned value analysis
- Billing amounts and their computation
- User vs time code based billing
- Cost and bill rates (Company vs Project)
- Project portfolio management

Celoxis Apps

- Basic workflow concepts
- Celoxis states, actions, workflow
- App assignee
- Bug Tracking in Celoxis
- Other custom defined apps (Issues, To Do)
- Importing the predefined apps

Celoxis Apps (Advanced)

- State managers
- Triggers
- Time-outs
- Attach custom fields on apps and transitions
- App Security
- Email integration

Reporting

- Concepts
- Create tabular reports
- Create graphical reports
- Running reports with promptable filters and custom views
- Create project specific reports
- Export data from reports
- Data limits

Resource Management

- Resource load
- Real time resource load
- Resource utilization (Planned vs Actual)
- Workspace wise resource capacity
- Skill / Role wise resource capacity
- Resource efficiency (Allocated VS Actual hours)

Q&A

If you have questions around Celoxis' functional aspects, features or about using Celoxis in specific scenarios in your organizations, our experts can help you get all the answers. Simply schedule an online Q&A session with our experts and have it resolved to your satisfaction.

Pricing

1. Each module can be scheduled at \$150/hour.

Terms and Conditions

1. We require 2 weeks advance notification to book a schedule.
2. Session Timings:
 - a. **North America:** 8:00 AM to 12:00 PM US Eastern time.
 - b. **EMEA:** 09:00 AM to 4:00 PM GMT.
 - c. **APAC:** 2:00 PM to 6:00 PM Australian Eastern time.
3. All Sessions are live online sessions, conducted via a web-conferencing tool like Gotomeeting or Webex.
4. Services shall be delivered by Celoxis experts, which may include Celoxis-authorized third-party vendors.
5. Validity of the program is **six months** from the date of purchase. Any unused hours will expire and are not refundable.
6. Any rescheduling of sessions can be done 72 hours before the scheduled session. We will not reschedule any session in case of no-show.
7. We record all our sessions for quality and internal training purposes. We do not distribute them.



Contact your Celoxis Account Manager, or reach us at sales@celoxis.com