Project Portfolio Planning with CA Clarity

Course Summary

Description

In this course students will be able to utilize the portfolio analysis and scenario capabilities of Clarity Portfolio Manager.

Objectives

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

- Create a portfolio inventory.
- Evaluate possible investments via budget, business case and alignment to corporate goals.
- Categorize and score a portfolio based upon alignment to corporate goals.
- Implement decisions made to add, continue or suspend investments.
- Use and understand the Portfolio Portlets.
- Create and apply different scenarios
- Apply processes

Topics

- Clarity and Portfolio Management
- Creating Portfolios
- Opening and Navigating in Portfolios
- Grouping Portfolios
- Scenarios
- Adding Investments to Scenarios
- Managing Scenarios
- Using the Portfolio Scorecard
- Using the Portfolio Analyze Tab

Audience

This course is designed for Portfolio Managers, PMO organizations charged with portfolio management reporting and analysis, and others who will be using Clarity Portfolio Manager to scope, plan, evaluate, limit, and distribute funding to strategic initiatives.

Prerequisites

This course requires working knowledge of the Clarity environment including navigation of the user interface. Portfolio Mangers should also have attended the Managing Projects with Clarity course or possess a working knowledge of the Clarity Project Manager module.

Duration

One day

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... to Your Success!"

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Course Outline

I. Clarity and Portfolio Management
- A. Gain an understanding of Clarity's Portfolio Management capabilities.
- B. Review Clarity Project Management and Portfolio Management Terms and Definitions
- C. Present an overview of Portfolio Management

II. Creating Portfolios
- A. Create a new portfolio
- B. Managing a Portfolio's Content:
- C. Adding or Removing contents to a portfolio
- D. Include or Exclude
- E. Power Filters
- F. Adding Individual Projects
- G. Synchronizing Investment Types

III. Opening and Navigating in Portfolios
- A. Opening and Navigating in a Portfolio
- B. Using the Portfolio Page Toolbar

IV. Grouping Portfolios
- A. Adding Child/Parent Portfolio Associations
- B. Rolling Up Budgeted Costs and Budgeted Benefits from Child Portfolios
- C. Distributing Budgeted Costs and Budgeted Benefits from a Parent Portfolio
- D. Removing Child Portfolio Associations

V. Scenarios
- A. Scenario Overview
- B. Viewing a List of Scenarios
- C. Building Scenarios
- D. Adding Constraints to Portfolio Scenarios
- E. Pinning Investments
- F. Including and Excluding Scenario Investments

VI. Adding Investments to Scenarios
- A. Adding Investments to your Scenario
- B. Completing Excluding a Scenario Investment
- C. Hiding /Un-hiding Scenario Investments

VII. Managing Scenarios
- A. Opening and Navigating Scenarios
- B. Communicating Scenarios
- C. Applying Scenarios to Portfolios
- D. Copying, Viewing and Modifying Scenarios

VIII. Using the Portfolio Scorecard
- A. Analyzing Portfolios Using the Scorecard
- B. Presenting Information on the Scorecard
- C. Viewing the Portfolios Investment Portlet
- D. Viewing the Portfolios Balance Portlet
- E. Viewing the Portfolios Gantt Portlet
- F. Viewing the Portfolios Financials Portlet

IX. Using the Portfolio Analyze Tab
- A. Life-cycle Funnel Portlet
- B. Budgeted Cost Portlet
- C. Benefits by Goal Portlet
- D. Cost/Benefit Portlet
- E. ROI/Alignment Zones Portlet
- F. Risk/Reward Quadrant

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