

Portfolio Management with Clarity™ PPM

Two Day Advanced

Learning



Instructor Led Training Version – Classroom or Online

Digital Celerity offers innovative training on all CA Clarity™ PPM modules and functionality

INTENDED PARTICIPANTS

Portfolio Management with Clarity PPM is designed for Portfolio Managers leveraging Clarity's Portfolio Management Module to plan, scope, analyze, and apply funds to business aligned investment initiatives. Project and Program Office Managers will also find this course of significant value.

COURSE GOALS

To ensure knowledge is effectively transferred to support best practice methods and use of the portfolio analysis and scenario capabilities of Clarity Portfolio Manager.

Transformational objectives:

- Executing decisions to add, continue, suspend or defer investments and related portfolio content
- Using scenarios with portfolios
- Valuation and analyze a portfolio
- How to use capacity planning
- Creating and applying scenarios and processes
- Creating a portfolio and portfolio inventory
- Creating ideas and projects
- Evaluating investments in view of budgets, business drivers/cases and alignment with corporate objectives.
- Categorizing and scoring a portfolio based on alignment with corporate goals
- Using Portfolio Portlets

COURSE PREREQUISITES

This is an advanced fundamentals course and participants are recommended to complete Digital Celerity's Projects and Resource Management with Clarity PPM to enable transformational change in Portfolio Management with Clarity PPM.

COURSE AVAILABLE IN COMPUTER BASED TRAINING-CBT-FORMAT

For more information or to schedule a course email us at: sales@digitalcelerity.com or call (408) 812-9999

COURSE DURATION

One Day ILT. The class starts at 9:00 a.m. and finishes at approximately 4:30 p.m. with a break for lunch.

MAXIMUM CLASS SIZE

Class size is limited to 12 participants with one Instructor. Each participant should have their own workstation. Optional Instructor's assistant is available to accommodate up to 15 participants (additional cost will apply).

TRAINING SETUP REQUIREMENTS

- All computers must meet the following minimum requirements: 1 GHz Pentium III with 512 MB Memory and 40 MB free space (for course files). Operating System must be Microsoft Windows 2000 Professional SP4, or Greater (Windows 7). Supported browsers include Internet Explorer and Firefox.
- Digital Celerity provides projects, views & instructions for classroom setup.
- Client will be responsible for installing Open Workbench, or Microsoft Project, Sun Java Runtime Environment (JRE), and the Digital Celerity-supplied training files on each computer in the classroom at least one day prior to the start of class.

COURSE STYLE AND CONTENT

This course is designed to incorporate collaborative demonstrations and discussions followed by structured exercises for each subject. This provides participants the opportunity to practice what they learn and successfully apply best practice knowledge to real-world project planning and management.

Portfolio Management with Clarity PPM - Course Curriculum

Course Overview

1 Module 1 – Role of Portfolio Management in Business Processes and Methodology

- 1.1 Business Challenges and Goals that are Satisfied by the Portfolio Management Discipline
- 1.2 Business Strategy and Portfolio Management
- 1.3 Considerations and the “Process” of Portfolio Management
- 1.4 Prioritization
- 1.5 Decision Making Concepts

2 Module 2 – Portfolio Management Methodology

- 2.1 What is a “Portfolio”?
- 2.2 Contents of Portfolios
- 2.3 Organization of Portfolios
- 2.4 Measuring / Prioritizing Best Practices



3 Module 3 – Working with Ideas

- 3.1 Overview of Idea Features in CA Clarity
- 3.2 Creating an Idea
- 3.3 Updating an Idea
- 3.4 Approving Ideas
- 3.5 Convert an Idea to a Project

Exercises -Workshop

4 Module 4 - Creating Portfolios and Managing Content

- 4.1 Creating Portfolios
- 4.2 Create a Portfolio
- 4.3 Adding, Updating and Removing Projects
- 4.4 Remove a Project
- 4.5 Add Roles to the Portfolio
- 4.6 Department Portfolios
- 4.7 Grouping Portfolios

5 Module 5 - Portfolio Valuation and Analysis

- 5.1 Portfolio Management Scorecard
- 5.2 Portfolio Management Analyze
- Exercises - Workshop

6 Module 6 – Using Scenarios

- 6.1 Understanding Scenarios
- 6.2 Building Scenarios
- 6.3 Working with Portfolio Scenarios
- Review - Q&A

7 Module 7 – Working with Reports

- 7.1 Access Clarity Reports
- 7.2 Navigate the Submitted Report
- 7.3 Review of Project Reports
- Exercises - Workshop

