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Managing Portfolios with Clarity PPM

COURSE DESCRIPTION

Managing Portfolios with Clarity PPM teaches portfolio managers how to use Clarity PPM's portfolio analysis and scenario capabilities.

AUDIENCE – Portfolio Managers

COURSE TYPE – Onsite / Online

PREREQUISITES – None

DURATION – Half Day or Full Day Classes Available: 8:00 AM to 12:00 PM and/or 1:00 PM – 5:00 PM

COURSE OUTLINE

Portfolio Management Overview

- What Is a Portfolio
- Portfolio, Program and Project Management – A closer look
- Other Investments (NPIOs)
- Portfolio Contents
- PMI Key Portfolio Deliverables and Clarity PPM
- Portfolio Prerequisites

Portfolio Investment Costs

- Investment Cost Data
- Financial Summary
- How to Create a Cost Plan

Accessing Portfolios

- Creating Portfolios
- General Portfolio Settings

Building Portfolio Content

- Portfolio Contents
- Include Investments Types
- Include and Filter Investment Types
- Adding Individual Investments
- Child Portfolios

Portfolio Synchronization

- Portfolio Synchronization Steps
- Set Up a Portfolio Sync Schedule

Portfolio Targets

- Defining Detailed Planning Targets
- Targets Definitions
- Define Role Targets
- Role Capacity

Portfolio Waterline

- Utilizing The Portfolio Waterline

Ranking Rules

- Weighted Ranking and Scoring
- Defining Ranking Rules
- Selecting Ranking Attributes
- Running Ranking Rules

Scenario Planning

- Creating Multiple Plans
- Creating Portfolio Plans
- Comparing Plans

Modifying Investment Data in a Plan

- Update General Investment Data
- Updating Resource Demand
- Updating Investment Costs

PMO Accelerator

- Portfolio Reports
    - Charts and Detail
- Portfolio Plan Comparison
- Portfolio Plan Changes

Portfolio Add-On: Meisterplan

- itDesign Company Overview
- Meisterplan and Clarity PPM
- Features
- Data connectors
- Technology

Updated July 13, 2016