regoconsulting
Clarity Expertise On Demand

2115 North Main Street
Centerville, UT 84014
Phone: (888) 813-0444
info@regoconsulting.com
www.regoconsulting.com

Managing Roadmaps with Clarity PPM

COURSE DESCRIPTION
Managing Roadmaps with Clarity PPM teaches portfolio manager who will be using Clarity PPM how to use the roadmap planning and control capabilities of Clarity PPM.

AUDIENCE – Portfolio Managers

COURSE TYPE – Onsite / Online

PREREQUISITES – None

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

COURSE OUTLINE

Roadmap Overview
- Purpose of Roadmaps
- Roadmaps vs. Portfolio
- Understanding the Data

Roadmap Structure
- Roadmap Structure
- Custom Picklists
- Fiscal Period Impacts Roadmaps

Security & Licensing
- Security and Rights
- License Impacts

Associating Roadmaps to OBS
- Working with OBS

Creating and Populating Roadmaps
- Creating Roadmaps
- Roadmap Details
- Populating the Roadmap
- Importing Data
- Manually Create Roadmaps
- Creating Items for Views
- Update Data for Manually created items

Sync of Roadmap Data
- Ongoing Roadmap Sync
- Sync Custom Attributes

Roadmap Views: Board Views
- Settings and Layout
- Choose the Column Values
- Working with Picklists
- Show/Hide Columns
- Drag/Drop Roadmap items
- Colors within Different Views

Roadmap Views: Board Views
- Settings and Layout
- Choose the Column Values
- Create/Apply Picklist
- Drag/Drop Roadmap items
- Colors within Different Views

Roadmaps Views: Timeline Views
- Timeline View Settings
- Swimlanes and Color By
- Updating the Timeline View
- Dependencies
- Modify Items

Roadmap View: Grid View
- Grid View Settings
- Select Fields
- Customizing Columns
- Adding Per Period Metrics
- Adjusting/Saving Views
- Updating Roadmap Data

Roadmap Targets
- Overview of Targets
- Targets and Goals

Deleting Roadmap Items
- Deleting Items

Roadmap Scenarios
- Overview of Scenarios
- Compare Scenarios

Roadmap Reporting
- Roadmap Printers
- Roadmap Timeline Reports
- Roadmap in Data Warehouse