Managing Portfolios with CA Clarity PPM

Project Portfolio Consulting Group offers beginner and advanced training on all CA Clarity™ PPM modules and capabilities.

INTENDED AUDIENCE
Managing Portfolios with Clarity is designed for Portfolio Managers who will be using Clarity Portfolio Manager to scope, plan, evaluate, limit, and distribute funds to high-priority initiatives.

COURSE GOAL
To be able to utilize the portfolio analysis and scenario capabilities of Clarity Portfolio Manager.

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.

OBJECTIVES
Upon successful completion of the course, the participant 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

COURSE STYLE AND CONTENT
This course is designed as demonstration and discussion followed by structured exercises for each subject. This gives each participant an opportunity to practice what they've just learned, and encourages them to apply their understanding to real-world portfolio management challenges.

DURATION
One day.

MAXIMUM CLASS SIZE
Class size is limited to 15 participants with one Instructor. Each participant must have their own computer.

RELATION TO OTHER COURSES
For Portfolio Managers who manage individual projects, the course: *Managing Projects with Clarity* is recommended.

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, Windows XP Professional SP2, or Windows Vista. Supported browsers include Internet Explorer 6.0 SP1 (or higher) and Firefox 2.0 (or higher). Instructor's computer must have Microsoft PowerPoint installed.
- Customer will provide a projection device capable of displaying Instructor's computer, plus flip charts and markers.
- If PPCG is hosting the training environment, a URL will be provided to Client. Access to the URL from within the Client's classroom must be tested in advance of class.
- If Client is hosting the training environment, a URL along with Administrative access must be provided to PPCG one week prior to class. This will be used to test the environment.
- If Client is hosting the training environment, Client and PPCG will mutually determine who is responsible for creating User ID's for the students.

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COURSE PROGRAM

Managing Portfolios with CA Clarity™ PPM

Clarity and Portfolio Management

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

Creating Portfolios

- Create a new portfolio
- Managing a Portfolio's Content:
  - ➢ Adding or Removing contents to a portfolio
  - ➢ Include or Exclude
  - ➢ Power Filters
  - ➢ Adding Individual Projects
- Synchronizing Investment Types

Opening and Navigating in Portfolios

- Opening and Navigating in a Portfolio
- Using the Portfolio Page Toolbar

Grouping Portfolios

- Adding Child/Parent Portfolio Associations
- Rolling Up Budgeted Costs and Budgeted Benefits from Child Portfolios
- Distributing Budgeted Costs and Budgeted Benefits from a Parent Portfolio
- Removing Child Portfolio Associations

Using the Portfolio Scorecard

- Analyzing Portfolios Using the Scorecard
- Presenting Information on the Scorecard
- Viewing the Portfolios Investment Portlet
- Viewing the Portfolios Balance Portlet
- Viewing the Portfolios Gantt Portlet
- Viewing the Portfolios Financials Portlet

Using the Portfolio Analyze Tab

- Life-cycle Funnel Portlet
- Budgeted Cost Portlet
- Benefits by Goal Portlet
- Cost/Benefit Portlet
- ROI/Alignment Zones Portlet
- Risk/Reward Quadrant

Scenarios

- Scenario Overview
- Viewing a List of Scenarios
- Building Scenarios
- Adding Constraints to Portfolio Scenarios
- Pinning Investments
- Including and Excluding Scenario Investments

Setting Scenario Optimization Parameters

- Adding Optimization Attributes
- Ranking Investments
- Ranking Optimization Parameters
- Ranking Scalar, Unbounded and Enumerated Attributes
- Weighting Optimization Parameters

Using the Efficient Frontier

- Determining and Constructing the Graph
- Analyzing the Efficient Frontier
- Viewing the List of Candidate Scenarios
- Viewing and Comparing Candidate Scenarios

Adding Investments to Scenarios

- Adding Investments to your Scenario
- Completing Excluding a Scenario Investment
- Hiding /Un-hiding Scenario Investments

Managing Scenarios

- Opening and Navigating Scenarios
- Communicating Scenarios
- Applying Scenarios to Portfolios
- Copying, Viewing and Modifying Scenarios
- Resource Capacity Planning with Scenarios
- Deleting Scenarios

FOR FURTHER INFORMATION

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