

# 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 – 3 Hours

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## 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