Clarity 16.0.1: Getting Started with Clarity

Course Code: 33CLR20083

Course Description

In this course, you will learn how to use Custom Investments in Clarity to chart a strategy. You will learn how to use hierarchies in Clarity to define the relationship between various investments. You will also learn how to use the roadmap in Clarity to review the objectives aligned with each investment and define the budget allocated to each product.

You will then evaluate ideas using a customizable lean canvas approach in Clarity and finally convert ideas to fully-fledged projects in Clarity to track them, manage them, and ensure they are completed on time and within the allocated budget. You will learn to enter hours in timesheets and review and approve timesheets.

You will learn to analyze the financial aspects of an investment. Finally, you will learn to manage resource allocation for all investments in Clarity and other essential elements in Clarity.

This course is primarily lab-driven.

Delivery Method

Instructor-Led

Duration

4 Days

Course Objectives

By the completion of this course, you will be able to:

- Set up Clarity
- Create and edit Custom Investments
- Create and edit Hierarchies
- Prepare Top-Down Planning with Roadmaps
- Capture, Develop and Convert Ideas into Projects
- Create, Open, and View Projects
- Enter Hours and Submit a Timesheet
- Manage Financial Plans
- Configure Resources, Roles, and Teams
- Manage Menu Links, Pages, and Custom Objects

Hands-On

This course includes practical hands-on exercises that will enable you to set up Clarity and work with Custom Investments, Hierarchies, Roadmaps, Ideas, Projects, Timesheets, Financial Plans, Resources, Pages, Menu Links, and Custom Objects.

Prerequisites

- None

Additional Courses Available

- Clarity: Digital Product Management
- Clarity 16.0.2: Supportability Training
- Clarity 16.0.3: Supportability Training
- Clarity 16.1.0: Supportability Training

Course Outline

Startup: Introduction to Clarity

Module 01: Setting up Clarity

- Admin Action: Activate Settings (Timesheets & New UI)
- Apply a UI Theme
- Customize Logo and Tooltip
- Specify Login Message
- Intro to Blueprints & Setting Up Objects
- Field Level Security
- Summary

Module 02: Working with Custom Investments

- Case Study
- Create a New Custom Investment Item (Products)
- Create an Investment Item from a Template
- Add Staff to Custom Investment Items
- Add Tasks to Custom Investment Items
- Create and Organize Tasks in Timeline
- Create To-Do Items for Tasks
- Add Assignments to Custom Investment Items
- Add Risks, Issues, and Changes to Custom Investment Items
- Create, Risks, Issues, or Changes
- Edit Risks, Issues, or Changes
- Create a Status Report for Custom Investment Items
- Configurable Status Report
- Mark an Investment Item as a Template
- Summary

Module 03: Working with Hierarchies

- Case Study
- Pre-Requisites
- Create a New Hierarchy
- Adding Investments as Cards to the Hierarchy Workspace
- Linking Cards in the Hierarchy Workspace
- Analyze Investments by Using the Cross-Object Investment Grid
- Review Investments by Using the Timeline Layout
- Create and Manage Custom Metrics
- Working with Aggregation Metrics
- Working with Calculation Metrics
- Manage Risks, Issues, and Changes
- Working with Visual Widgets in the RIC Modules
- Manage Status Report
- Field Level Security in Hierarchies
- Summary

Module 04: Working with Roadmaps

- Case Study
- Why Roadmaps?
- Create a Roadmap
- Add Roadmap Items
- Import Roadmap Items from a CSV File
- Import Projects, Custom Investments, and Ideas from Clarity
- Synchronize Roadmap Items with Linked Projects, Custom Investments, or Idea Attributes
- Working with Board Layout
- Working with Investment Grid
- Visualize and Model Work Using the Timeline
- Create Roadmap Planning Scenarios
- Compare Scenarios in the Timeline
- Enabling Field-Level Security for Roadmaps and Roadmap Items
- Working with Configurable Widgets
- Summary

Module 05: Working with Ideas

- Case Study
- Create an Idea
- Create an Idea from a Template
- Edit Ideas
- Staff Ideas
- Associate Ideas with Blueprints
- Add Risks, Issues, and Changes to Ideas
- Edit Risks, Issues, or Changes
- Working with Configurable Widgets
- Create a Status Report for Ideas
- Configurable Status Report
- Convert Ideas to Project Using Templates
- Summary

Module 06: Working with Projects

- Case Study
- Create a Project
- Create a Project from a Template
- Edit Projects
- Staff a Project Team
- Add One or More Roles to Project Staffing Grid
- Replace Staff Members in a Project
- Create and Organize Tasks in a Timeline view
- Create To-Do Items for Tasks
- Add Risks, Issues and Changes to Projects
- Create a Status Report for Projects
- Configurable Status Report - Canvas
- Working with Configurable Widgets
- Summary

Module 07: Working with Timesheets

- Case Study
- Create a Timesheet
- Create a Timesheet with Previous Timesheet Tasks or Current Assignments
- Create a Timesheet by Adding Work Items from Active Investments
- Enter Time for Others
- Review, Approve and Return Submitted Timesheets
- Review Submitted Timesheets
- Approve or Reject Submitted Timesheets from Review & Approve Tab and Timesheets tab
- Adjust an Approved and Posted Timesheet
- Summary

Module 08: Working with Financials

- Case Study
- Create a Cost Plan
- Populate Cost Plan Rows with Allocation or Assignment Data
- Copy a Cost Plan
- Associate a Cost Plan with a Benefit Plan
- Create a Cost Plan Detail
- Submit Cost Plans as Budget Plans
- Create a Budget Revision
- Actual Transactions Grid
- Source for Actual Transactions
- Actual Transactions
- Summary

Module 09: Working with Resources

- Case Study
- Create a Team
- Staffing Investments in Clarity
- Staffing Requests by Investments
- Assign Resources or Roles to Investments
- Replace a Role with a Named Resource
- Remove an Allocation from an Investment
- Manage Allocations by Resources
- Balance Resource Workload
- Summary

Module 10: Working with Custom Objects, Pages, and Menu Links

- Case Study
- Working with Custom Objects
- Working with Custom Objects in Board Layout
- Working with Pages
- Menu Links
- Summary