

Clarity 16.1

**WHAT'S
NEW**

Clarity Release Schedule



Release	Release Date (Projected)	EOS Date
16.0.1 (22-PI-1)	February 7, 2022	November 30, 2024
16.0.2 (22-PI-2)	May 9, 2022	November 30, 2024
16.0.3 (22-PI-3)	August 8, 2022	November 30, 2024
16.1.0 (22-PI-4)	November 7, 2022	November 30, 2025
16.1.1 (23-PI-1)	February 6 20 , 2023	November 30, 2025
16.1.2 (23-PI-2)	May 8 22 , 2023	November 30, 2025
16.1.3 (23-PI-3)	August 7 21 , 2023	November 30, 2025
16.2.0 (23-PI-4)	November 6 20 , 2023	November 30, 2026

Agenda

- **Customer Voice**

- Edit visual widgets in widgets ribbon
- Ability to star (favorite) various subobjects (e.g. Roadmap Items, Risks)
- Grouping for filter options
- Views: List Favorites first, rename “Default” to “Recommended”
- Views: Sharing via access groups
- Option to display flyout on right or bottom
- Persist selected items (within session)
- Enable canvases with tables and attributes on all Investments
- Investment Canvas: Stock/custom subobjects & To Dos available in tables
- Page canvases: Add attribute support, including rich text
- Conversations: Option to show in flyout for blueprintable objects
- Conversations: Displays name & resource ID instead of name & role
- Users grid: Create users, mark as starred, add'l attributes & available in audit
- Audit grid in Modern UX Administration
- Grids: Per Column Aggregation by Data Type (Avg, Count, Min, Max, Sum)
- Generic CSV import for custom master objects **BETA**

- **Transforming Investment Management**

- Copy projects
- Simplified Scheduling: Moving a task shifts all successor tasks
- Retention of task timeline expand/collapse state & baseline compare
- Flag to allow filtering of assignments to show only those for active resources
- Make To Do's table available on Status Reports
- Option to set Status Report Date to Current Date on preview
- Status Reports workspace (across investments)
- Bulk PDF export for Status Reports
- Tasks workspace: Calendar for scheduling tasks
- Tasks workspace: Board w/ swimlanes, card configuration & sorting **BETA**
- Timesheets: Convert Resource Manager Filter From String to Lookup
- Timesheets: Viewing with Approval Rights for Closed Time Periods
- Timesheets: Visual Widgets over grid

- **Reinventing Resource Management**

- ‘% Availability’ as a unit of measure

- **Lifecycle Management (incl. Demand Mgmt)**

- Action Items module on Investments
- Process Action Items: Ability to respond via email
- Hierarchies: Staff module with visual widgets
- Hierarchies: Financials module editable w/ actuals drill down
- Hierarchies: TSVs available for custom subobjects

- **Clarity Checklists and To Dos**

- Visual Widgets on To Do modules within investments
- My Workspace: Conversations and email notification improvements

- **Top Down Planning (Roadmaps)**

- Drag-and-drop ordering of roadmap items in grid*
- Filters for ‘Has dependencies’ & ‘Has agreements’*
- View option to display names on roadmap events and item events in legend*
- Auto-granting Roadmap Navigate right when Sharing

- **Providing Financial Transparency**

- Transaction entry via grid
- Field level security (FLS) on Cost Plans/Budgets/Benefit Plans
- Visual widgets on Investment Cost Plan/Budget/Benefit Plan Detail modules

- **Clarity Connections (Clarity-Rally)**

- Sync individual investments on demand (C2R now; R2C in 16.1.0.1)
- Quality-of-Life Improvements: Server time zone handling, support for Clarity ‘enum’ lookups & null values, immediate return of formatted Rally ID following creation from Clarity, & sync message indicates ‘created in Rally’

Adoption and Usability

- From a usability perspective, the following updates have been included in this release;
 - User option to display the configurable Fly-out either on the right side of the page (current behavior) or the bottom of the page in a horizontal position.
 - User configuration option to set Project banner color to 'none' to comply with Corporate branding standards.
 - Improved navigation experience where Clarity maintains (or remembers) item selection as a user navigates away from a page and returns (within session).
- From an accessibility perspective, reported issues across (12) WCAG success criterion have been remediated in this release.

Customer Voice: Usability Enhancements



- Edit visual widgets in widgets ribbon
- Ability to star (favorite) various subobjects
- Grouping for filter options
- Views: List Favorites first, rename “Default” to “Recommended”
- Views: Sharing via access groups
- Option to display flyout on right or bottom
- Persist selected items (within session)
- Enable canvases with tables and attributes on all Investments
- Investment Canvas: Stock/custom subobjects & To Dos available in tables
- Page canvases: Add attribute support, including rich text
- Conversations: Option to show in flyout for blueprintable objects
- Conversations: Displays name & resource ID instead of name & role

Customer Voice: Usability Enhancements



- *Ability to star (favorite) various subobjects*
- *Users grid: Create users, mark as starred, add'l attributes & available in audit*
- *Audit grid in Modern UX Administration*
- *Grids: Per Column Aggregation by Data Type (Avg, Count, Min, Max, Sum)*
- *Generic CSV import for custom master objects* BETA

Ability to star (favorite) various subobjects (and sub-subobjects)

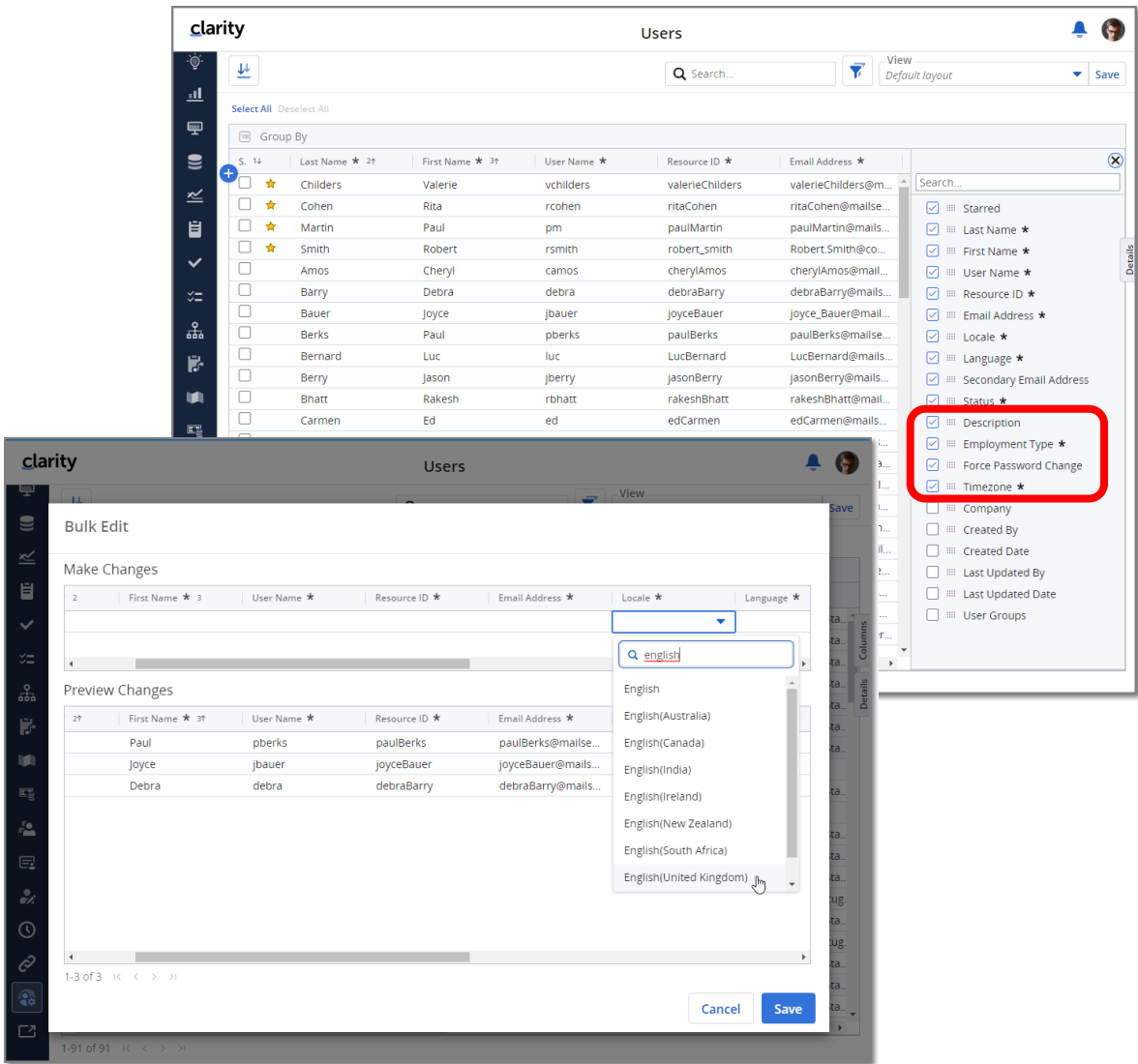
- Following object instances can now also be starred:
 - Staff
 - Assignments
 - Financials
 - Cost plan and cost plan details
 - Benefit plans and benefit plan details
 - Budgets and budget plans
 - Risk, Issues, and Changes
 - Status Reports
 - Roadmap Items
 - To Dos
 - Users (MUX Administration)
 - Custom Sub-objects
 - Custom Sub-sub-objects (third level)

The top screenshot shows the 'Funding' view for 'Aetna FS0006'. It features a table with columns: St..., Month, Credit, Debit, and Total Amount. The table lists funding transactions for months from 2022-02 to 2022-07. The bottom screenshot shows the 'Roadmap' view for 'Digital Banking Product Line Roadmap RD00017'. It features a dashboard with various metrics and a table of roadmap items. The dashboard includes sections for 'Investment by Strategy' and 'Retain Custom...'. The table of roadmap items has columns: Starred, In Plan, Rank, Roadmap Item, Why Do This, and Must Have.

St...	Month	Credit	Debit	Total Amount
★	2022-02	3,600,000	0	3,600,000
★	2022-03	2,550,000	35,000	2,515,000
★	2022-04	1,000,000	0	1,000,000
	2022-05	1,000,000	80,000	920,000
	2022-06	2,400,000		
	2022-07	2,615,000		

Starred	In Plan	Rank	Roadmap Item	Why Do This	Must Have
★	Not In Plan		Digital Banking as a Service	Innovation	
★	In Plan		Automatic Deal Structuring and Decision...	Delight Users	Top Cl
★	In Plan		Configuration Options	Retain Customers	Top Cl
★	In Plan		Digital Banking User Experience	Delight Users	Top Cl
★	In Plan		AI Analytics	Retain Customers	
★	Not In Plan		Trend Analysis	Improve Technology	
	Not In Plan		Customer Portal Dashboard	Delight Users	
	Not In Plan		API Performance	Improve Technology	
	Not In Plan		BNPL at the point-of-sale (POS)	Innovation	

Managing users via Users grid



- Following user attributes are also now available in the “Users” management grid:
 - Description
 - Employment Type
 - Force Password Change
 - Timezone
 - Starred
- Users grid will support bulk editing of data.

User API now available

- Users can also be created & managed using the REST APIs.
- User creation is done by making a POST call to the endpoint
 - {{ClarityServer}}/ppm/rest/v1/**users**
- All required values need to be passed for successfully creating the user.
- Users can also be assigned to one of multiple user groups at the time of creation.
- Users can be created in bulk using API.
- The locale (User setting) and timezone (to GMT) will be defaulted.

The image displays two screenshots related to user management. The top screenshot shows a REST client interface for a POST request to the endpoint `{{ClarityServer}}/ppm/rest/v1/users`. The request body is in JSON format, containing user details: `{ "userName": "rsmith", "resourceName": "robert_smith", "lastName": "Smith", "firstName": "Robert", "email": "Robert.Smith@company.com", "status": 200, "timezone": "America/Los Angeles", "language": 1, "locale": "en_US", "employmentType": 301, "userGroups": [5000323, 5000324] }`. The bottom screenshot shows the Clarity user management interface. A table lists users, with the user 'Robert Smith' (username 'rsmith', email 'Robert.Smith@company.com') highlighted in blue. A red arrow points from the 'userGroups' field in the JSON body to the 'Smith' row in the table, indicating the user's assignment to a specific group.

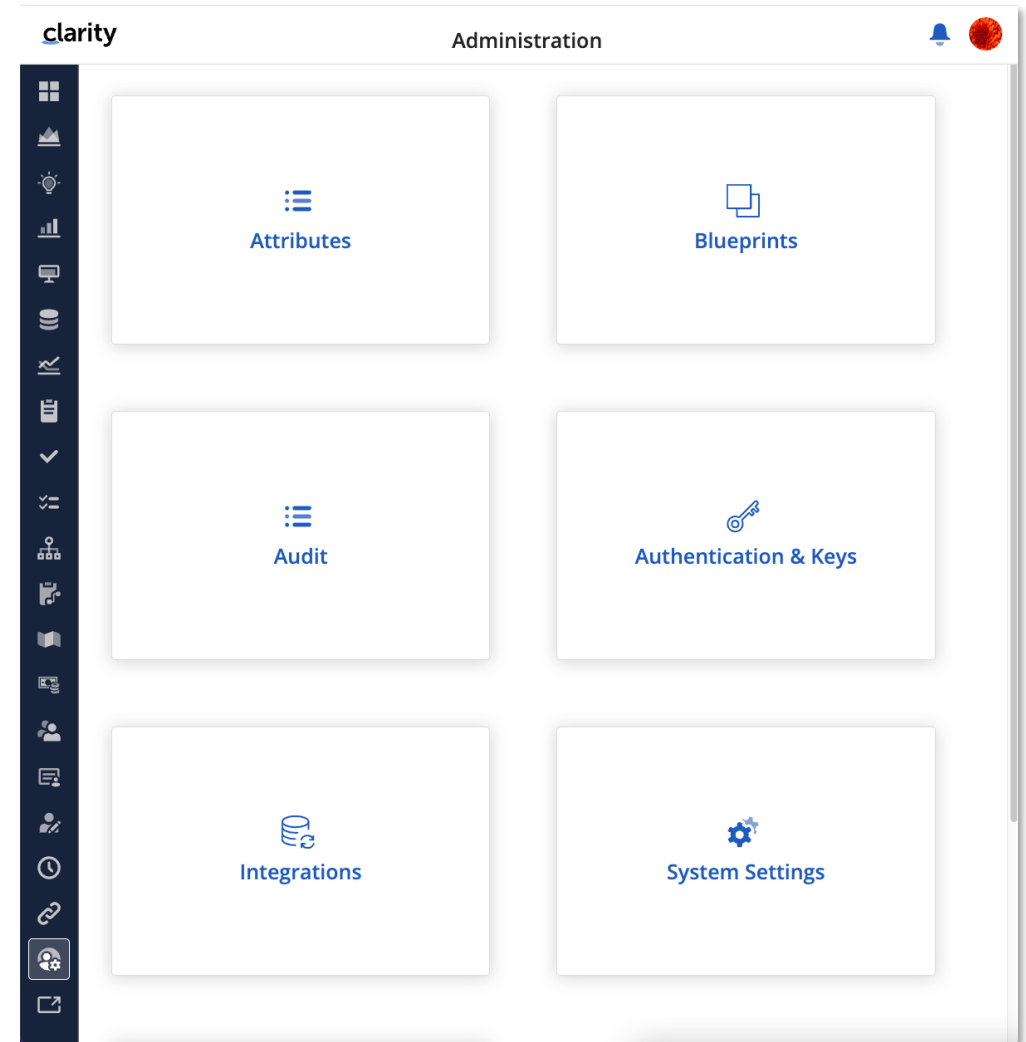
S.	Last Name	First Name	User Name	Resource ID	Email Address	Locale
5.	Childers	Valerie	vchilders	valerieChilders	valerieChilders@m...	English(United Sta...
6.	Cohen	Rita	rcohen	ritaCohen	ritaCohen@mailse...	English(United Sta...
7.	Martin	Paul	pm	paulMartin	paulMartin@mails...	English(United Sta...
8.	Smith	Robert	rsmith	robert_smith	Robert.Smith@co...	English(United Sta...
9.	Amos	Cheryl	camos	cherylAmos	cherylAmos@mail...	English(United Sta...
10.	Barry	Debra	debra	debraBarry	debraBarry@mails...	English(United Sta...
11.	Bauer	Joyce	jbauer	joyceBauer	joyceBauer@mails...	English(United Sta...
12.	Berks	Paul	pberks	paulBerks	paulBerks@mailse...	English(United Sta...
13.	Bernard	Luc	luc	LucBernard	LucBernard@mails...	French(France)
14.	Berry	Jason	jberry	jasonBerry	jasonBerry@mails...	English(United Sta...
15.	Bhatt	Rakesh	rbhatt	rakeshBhatt	rakeshBhatt@mail...	English(India)
16.	Carmen	Ed	ed	edCarmen	edCarmen@mails...	English(United Sta...
17.	Chapin	Tom	tomchapin	tomchapin	tomchapin@mails...	English(United Sta...
18.	Chasen	Nicole	nchasen	nicoleChasen	nicoleChasen@ma...	English(United Sta...
19.	Clark	Patrick	patrick	patrickClark	patrickClark@mail...	Portuguese(Portug...
20.	Coleman	Joyce	jcoleman	joyceColeman	joyceColeman@m...	English(United Sta...
21.	Dixon	Danielle	danielle	danielleDixon	Danielle.Dixon@m...	Portuguese(Portug...
22.	Donegal	Amy	amydonegal	amydonegal	amydonegal@mail...	English(United Sta...
23.	Evans	Nick	nevans	nickEvans	nickEvans@mailse...	English(United Sta...

Audit for the MUX

- Administrative users now have access to audit information directly from the modern user experience
 - A new 'Audit' tile is available from MUX > Administration providing users with Clarity audit information for 'audit enabled' objects.
 - A new permission, 'Administration - Audit - Navigate' is required to access the Audit tile.
 - The Audit listing leverages the configurable grid toolset utilized throughout Clarity

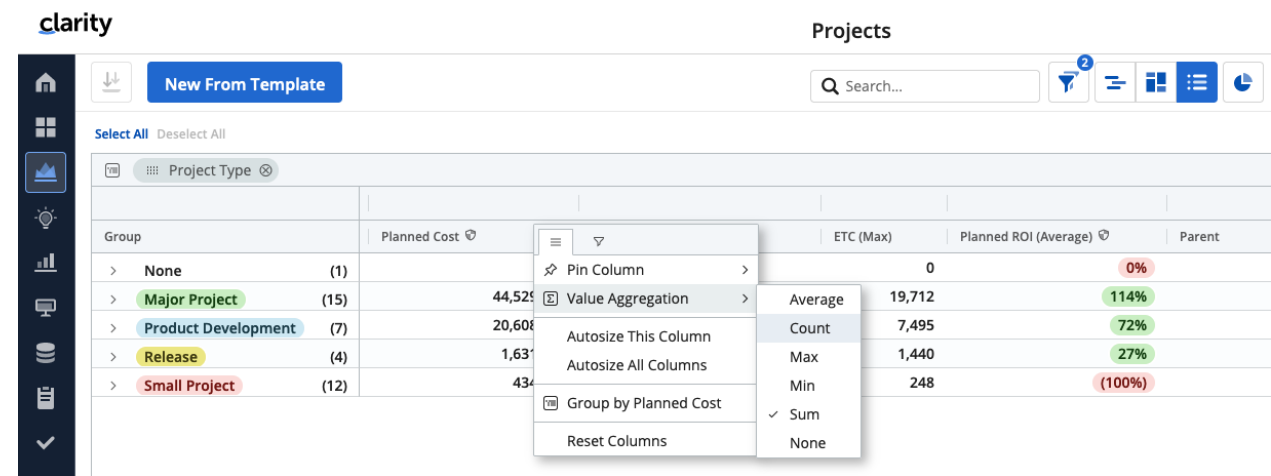
Audit: New Administration Tile & Permission

- A new 'Audit' tile provides users with Clarity audit information for 'audit enabled' objects.
 - Available from MUX > Administration
- A new user permission is required to view the Audit tile 'Administration - Audit - Navigate'.
- Once within MUX > Administration > Audit, users will also require the "Audit Trail – Access" right to view audit details.
- The method, from Classic, to enable audit for Clarity objects is not changing.
- In addition, the Classic (global) audit page remains in place
 - Administration > Data Administration > Audit Trail.



Grids: Per Column Aggregation by Data Type in the Grid

- When in Group By mode, users will see a “Value Aggregation” in the column header for attributes that support rollup aggregation
- A suffix will display the aggregation method set for that column after the column label
 - Default aggregation method is “Sum” and for “Sum”, the prefix will not display
- Turn off aggregation for a column by selecting “None” under “Value Aggregation”



	Number, Money, Calculated, Integer	Percent	Date	Boolean	TSV	String
Sum	✓			✓	✓	
Average	✓	✓				
Count	✓			✓		✓
Min/Max	✓	✓	✓			
None	✓	✓	✓	✓	✓	✓

Grids: Per Column Aggregation by Data Type in the Grid

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Projects

New From Template

Search...

Per-Period Metrics - 7 Periods

Value Aggregation setting on TSV "Totals" controls the aggregation for its corresponding TSV Periods

Select All Deselect All

Project Type

Group	ed Cost (Count)	ETC (Min)	Planned ROI (Average)	Totals	2022-06	2022-07	2022-08	2022-09	2022-10	2022-11
> None (1)	0	0	0%	Allocation	0	0	0	0	0	0
> Major Project (15)	15	0	114%	Allocation	3,610	10,035	11,972			
> Product Development (7)	7	0	72%	Allocation	3,391	6,231	5,879			
> Release (4)	4	528	27%	Allocation	0	480	1,152			
> Small Project (12)	11	0	(100%)	Allocation	0	1,152	1,952			

Value Aggregation settings:

- Pin Column
- Value Aggregation
 - Sum
 - None
- Autosize This Column
- Autosize All Columns
- Reset Columns

Generic CSV Import for Custom Master Objects BETA

Based on our Roadmap Item CSV Import but with new capabilities which include

- Ability to Create and Update records via CSV Import
- Added support for Static, Dynamic (SVL and MVL) Lookups
- Option for exported CSV record format to be directly importable into another Clarity system
- Improved language and locale support

Generic CSV Import for Custom Master Objects BETA

- Insert and Update Operations for Import
 - If the Custom Master Object ID exists, it will update otherwise the import will insert to create a new record
- Provide support for the following Studio datatypes
 - Number
 - Percentage
 - Strings
 - Dates (Fixed)
 - Boolean
 - Lookups
 - Static/Dynamic
 - SVL and MVL
 - Money (Single currency Clarity system)

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Funding Source

Actions

Import from CSV Beta

Export to CSV

Starred	Name *	Type	% Of Overall Funding	Address	Funding Total	Priority	Funding Managers	Color
<input type="checkbox"/>	Aetna	Insurance	17%	123 North Ave., New York, NY 00000	18,025,000	Very High	Fowler, Ray; Garc...	Blue
<input type="checkbox"/>	Anthem	Insurance	24%	888 Western Ave., San Francisco, CA 88888	25,965,000	High	Gupta, Rakesh; Ha...	Blue
<input type="checkbox"/>	Blue Cross Blue Shield	Insurance	23%	789 East Ave., Los Angeles, CA 99999	23,000,000	Very High	Bhatt, Rakesh; Hill...	Red
<input type="checkbox"/>	Donations	Charity	5%	555 Free drive, Chicago, IL 60000	5,000,000	Low	Barry, Debra	Red
<input type="checkbox"/>	Federal Patient Billing	Medicare	13%	456 South St., Washington, DC 000000	1,500,000	Medium	Awad, Rashid; Bak...	Green
<input type="checkbox"/>	Fund Raisers	Fund Raiser	9%	Multiple	7,500,000	Medium	Chen, Chih-wei	Green
<input type="checkbox"/>	Research programs	Grants	9%	1111 Federal street, Washington, DC 00000	10,000,000	High	Clarke, Stanley	Blue

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Funding Source

Actions

Import CSV

Instructions

Import requires a properly formatted CSV file.

To Export a file with the correct format, set CSV Export Format to 'Export/Import'.

This option can be found in Settings on the General tab.

Import CSV

Starred	Name *	Type	% Of Overall Funding	Address	Funding Total	Priority	Funding Managers	Color
<input type="checkbox"/>	Aetna	Insurance	17%	123 North Ave., New York, NY 00000	18,025,000	Very High	Fowler, Ray; Garc...	Blue
<input type="checkbox"/>	Anthem	Insurance	24%	888 Western Ave., San Francisco, CA 88888	25,965,000	High	Gupta, Rakesh; Ha...	Blue
<input type="checkbox"/>	Blue Cross Blue Shield	Insurance	23%	789 East Ave., Los Angeles, CA 99999	23,000,000	Very High	Bhatt, Rakesh; Hill...	Red
<input type="checkbox"/>	Donations	Charity	5%	555 Free drive, Chicago, IL 60000	5,000,000	Low	Barry, Debra	Red
<input type="checkbox"/>	Federal Patient Billing	Medicare	13%	456 South St., Washington, DC 000000	1,500,000	Medium	Awad, Rashid; Bak...	Green
<input type="checkbox"/>	Fund Raisers	Fund Raiser	9%	Multiple	7,500,000	Medium	Chen, Chih-wei	Green
<input type="checkbox"/>	Research programs	Grants	9%	1111 Federal street, Washington, DC 00000	10,000,000	High	Clarke, Stanley	Blue

Transforming Investment Management



- Copy projects
 - Simplified Scheduling: Moving a task shifts all successor tasks
 - Retention of task timeline expand/collapse state & baseline compare
 - Flag to allow filtering of assignments to show only those for active resources
 - Make To Do's table available on Status Reports
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 - Status Reports workspace (across investments)
 - Bulk PDF export for Status Reports
 - Tasks workspace: Calendar for scheduling tasks
 - Tasks workspace: Board w/ swimlanes, card configuration & sorting BETA
-
- *Timesheets: Viewing with Approval Rights for Closed Time Periods*
 - *Timesheets: Convert Resource Manager Filter From String to Lookup*
 - *Timesheets: Visual Widgets over grid*

Timesheets Grid - Viewing Timesheets for Closed Time Periods

- Before 16.1.0, If User with 'Timesheet Approve All' right tries to view the timesheets in Closed period then 'Timesheet' tab in Details Flyout (in Timesheets Grid) use to be blank

Time Period between Dec.20.2021 and Dec.25.2021 is Closed

Time Reporting Periods

From Date12/20/2021

To Date12/26/2021

StatusClosed

Marked For DeletionNo

FilterShow AllClear

Start Date

12/20/21

12/26/21

User with 'Timesheets Approve All' rights see blank 'Timesheet' tab in Details Flyout

My TimesheetReview & ApproveTimesheets

Download

ViewOpen Periods

Add Filter

Time Period Start Date = Dec 20, 2021 To Dec 25, 2021

Resource Name = bhatt

Resource Manager = Fowler

Time Period Is Open = No

Resource OBS = Development; ARD Business Unit

Employment Type = Employee

Status = Open; Submitted; Approved

Select AllDeselect All

Group By

Notes	Resource Na...	Time Period Start Date	Status	Total	Posted Time	Resource Manager	Approved By
<input type="checkbox"/>	Bhatt, Rakesh	Dec 20, 2021	Approved	80		Fowler, Ray	Fowler, R

TimesheetNotesDetails

User only has 'Timesheets Approve All' rights

Resource: Ray Fowler - Global Access Rights

Below are this resource's global rights.

Access Right

Granted ThroughAll

FilterShow AllClear

Access Right

☐ Timesheets - Approve All

☐ Timesheets - Navigate

AddRemoveContinueReturn

Timesheets Filter – Convert ‘Resource Manager’ from Sting to Lookup

- In 16.1.0, ‘Resource Manager’ filter is changed to Lookup
 - Will help user to select multiple values
 - Relatively easy while working with common names
 - Included ‘Current User’ option in the list
 - More powerful while working with Group filters

Resource Manager’ filter is a Lookup type in Timesheets Grid

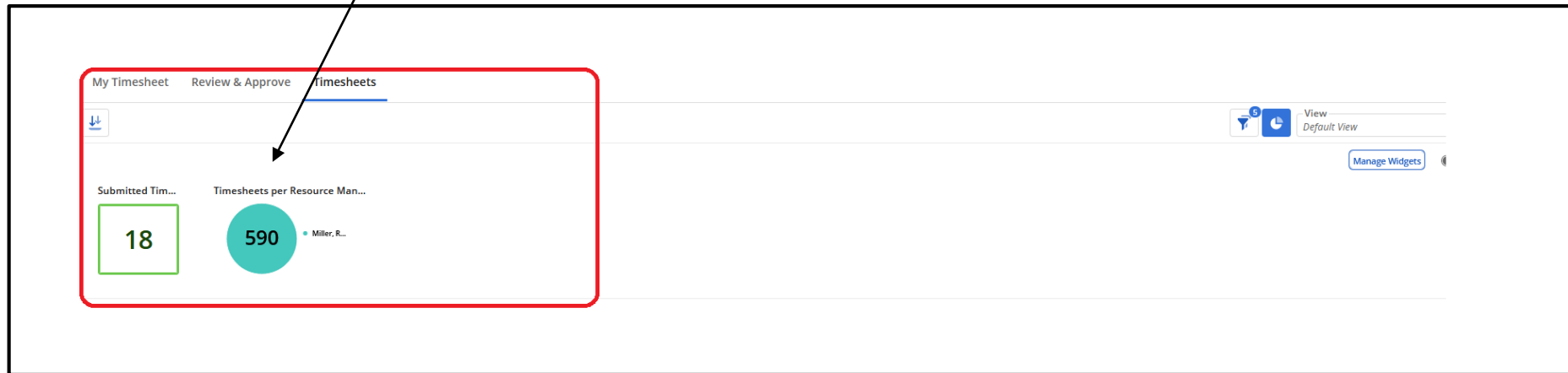
The screenshot displays the 'Timesheets' tab in a software interface. At the top, there are tabs for 'My Timesheet', 'Review & Approve', and 'Timesheets'. Below these, there's a 'Match Filter Group' section with 'All' and 'Any' buttons. Two filter rules are visible: 'Resource Manager = Current User' and 'Time Period Is Open = No'. A third rule is partially visible: 'Resource Manager = Current User' and 'Resource Name = bhatt'. A dropdown menu is open for the 'Resource Manager' filter, showing a search bar and a list of users. The 'Current User' option is selected at the top of the list. The list includes names, email addresses, and roles (all are 'Employee').

Is Equal To	Search...
Clear Selected	
<input checked="" type="checkbox"/>	Current User
<input type="checkbox"/>	Amos, Cheryl cherylAmos Employee
<input type="checkbox"/>	Andersson, Peter peterandersson Employee
<input type="checkbox"/>	Arpel, Ian admin Employee
<input type="checkbox"/>	Awad, Rashid rashidawad Employee
<input type="checkbox"/>	Baker, Isaac issacBaker Employee
<input type="checkbox"/>	Barry, Debra debraBarry Employee
<input type="checkbox"/>	Bauer, Joyce joyceBauer Employee

Timesheet Widgets

- All Widget functionality is now available in Timesheets Grid

Widgets created on Timesheets Grid



Resource Management



- **‘% Availability’ as a unit of measure***

Work Effort Unit of Measure: % Availability

- A personal, user-specific general setting is now available to use % Availability based on the associated resource's calendar for stock work effort fields.
- This unit of measurement is used for Staffing allocations and Work Effort metrics such as estimates and actuals.

% Availability as a Unit of Measure

Avatar, Settings, General

- User-specific personal setting
- **FTE & Days** uses the default Standard Calendar
- **Hours & % Availability** uses the Resource's Calendar
- Work Effort Per-Period Metrics
 - Allocation
 - Hard Allocation
 - ETC (Estimates)
 - Actuals
 - Total Usage / Total Effort
 - Baseline Usage
 - Remaining Allocation
 - Remaining Availability
- Does not impact the 'Staffing Plan' Workspace

SETTINGS

Profile

General

Staffing Plan

Date Display

☒ Oct 20, 2022 ☐ 10/20/22

Unit of Measure

☐ FTE ☐ Hours ☐ Days ☒ % Availability

CSV Export Format

☒ Default ☐ Export/Import

Language *

English

Locale *

English(United States)

Changes to Language and Locale will take effect on next login.

Lifecycle Management (incl. Demand Mgmt)

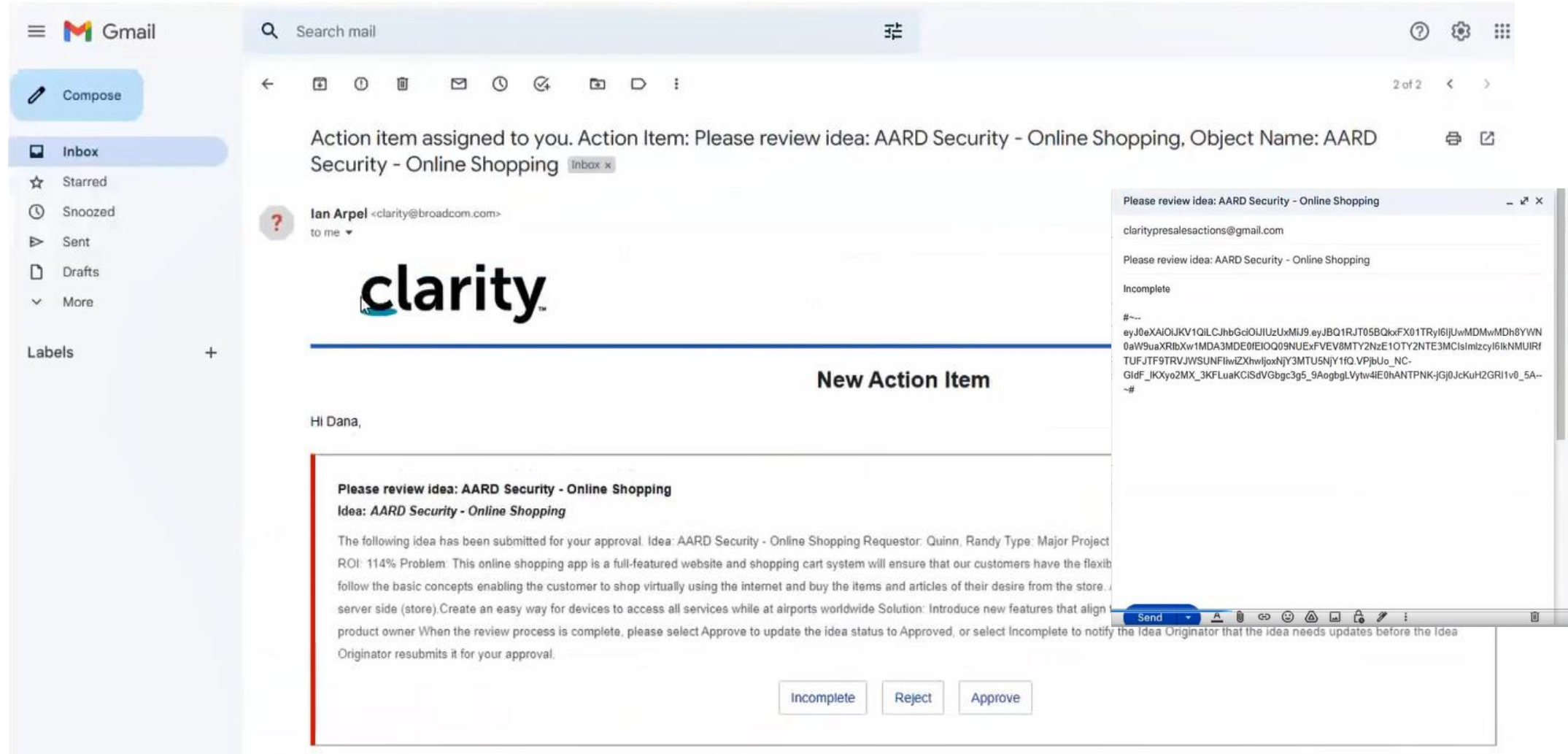


- Hierarchies: Staff module with visual widgets
- Hierarchies: Financials module editable w/ actuals drill down
- *Action Items module on Investments*
- *Process Action Items: Ability to respond via email*
- *Hierarchies: TSVs available for custom subobjects*

Viewing the Email for the New Action Items Module

Buttons
available for
Incomplete,
Reject,
Approve

Generates
and
response
email



Viewing the Email for the New Action Items Module

Polling job that runs every 5 minutes

☰

HOME

GLOBE

LINK

Clarity

REPORTS JOBS ▾

Jobs: Available Jobs

JOB TYPE
poll

DESCRIPTION

EXECUTABLE TYPE
All

CATEGORY
All

STATUS
Active

FILTER

SHOW ALL

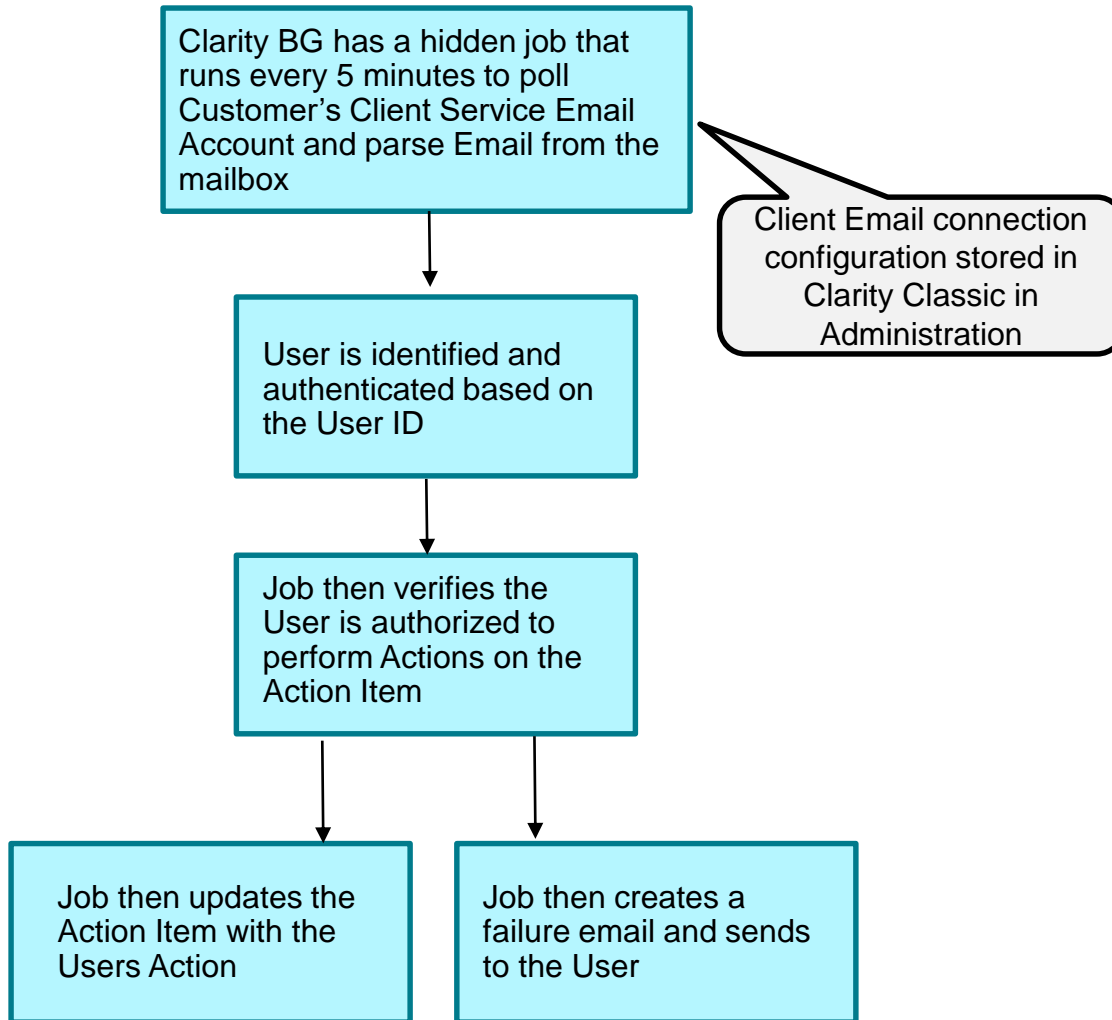
CLEAR

<input type="checkbox"/>	Job Type	Description	Executable Type
<input type="checkbox"/>	Poll Mail Service (Beta)	Poll Mail Service for events	Java

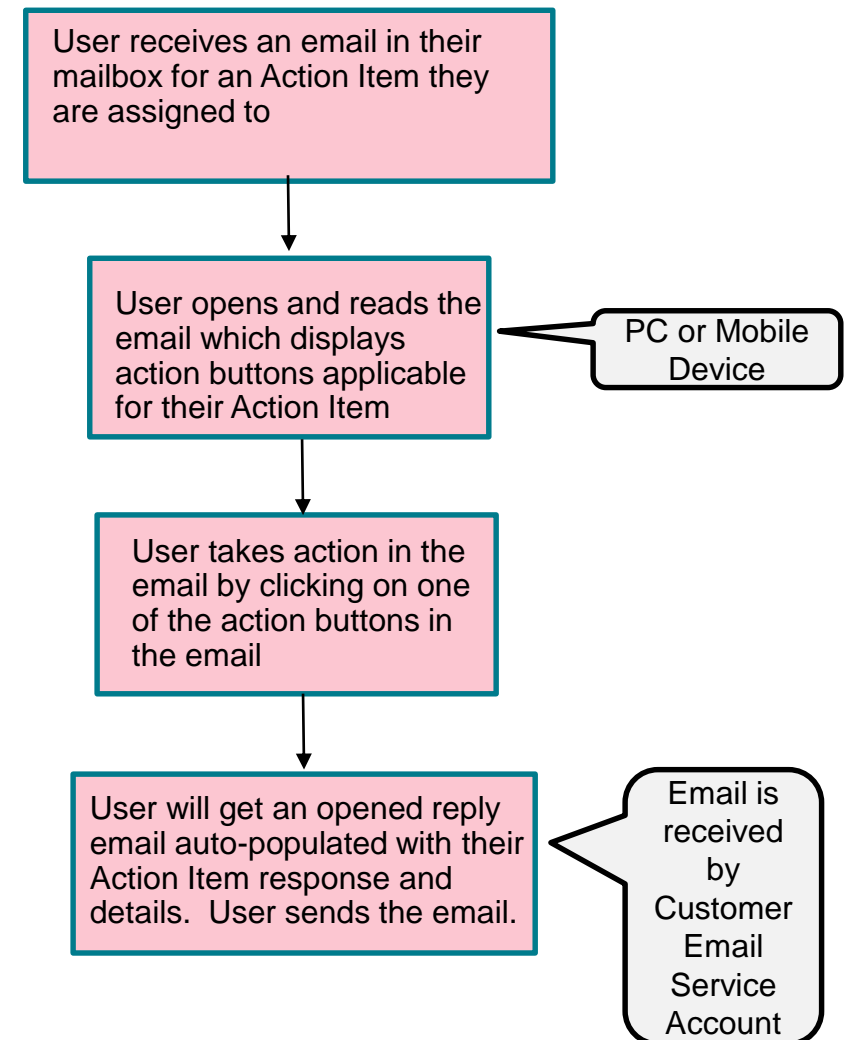
Displaying 1 - 1 of 1

Responding to Action Items via Email – Flow Diagram

Processing



User Experience



TSV fields in Investment Sub-Objects

- TSV fields that are API-enabled on custom sub-objects of Investment (Common Investment level, or individual investments like Projects, Ideas etc.) are now available in View Options of the corresponding Hierarchy modules (configured through Blueprint) for configuration.
- Standard TSV field capabilities are supported, like:
 - Ability to configure as Per-Period Metrics
 - Ability to configure corresponding Total fields
 - Aggregation of values at individual group level when using data grouping
 - Filtering
 - Support in Widgets
 - Etc.

Project Portfolio
H0000006

Service Requests Financials Properties

Search... < Per-Period Metrics - 4 Periods > View View TSVs Save

Service Requests	2022-09	2022-10	2022-11	2022-12
Name * ↑	Incidents	Incidents	Incidents	Incidents
Equipment Repair	3	5	1	
Network outage	3	2	1	
Product Education	12	7	9	
Product Support by Vendor	13	17	21	
Transport Service	18	15	7	
Weak signal	15	13	7	

Columns Details

View Options

Grid

Periods

Months

Start Period

Prior Period

End Period

End of Current Year

Totals

☒ Sum of Periods ☐ Grand Totals

Per-Period Metrics

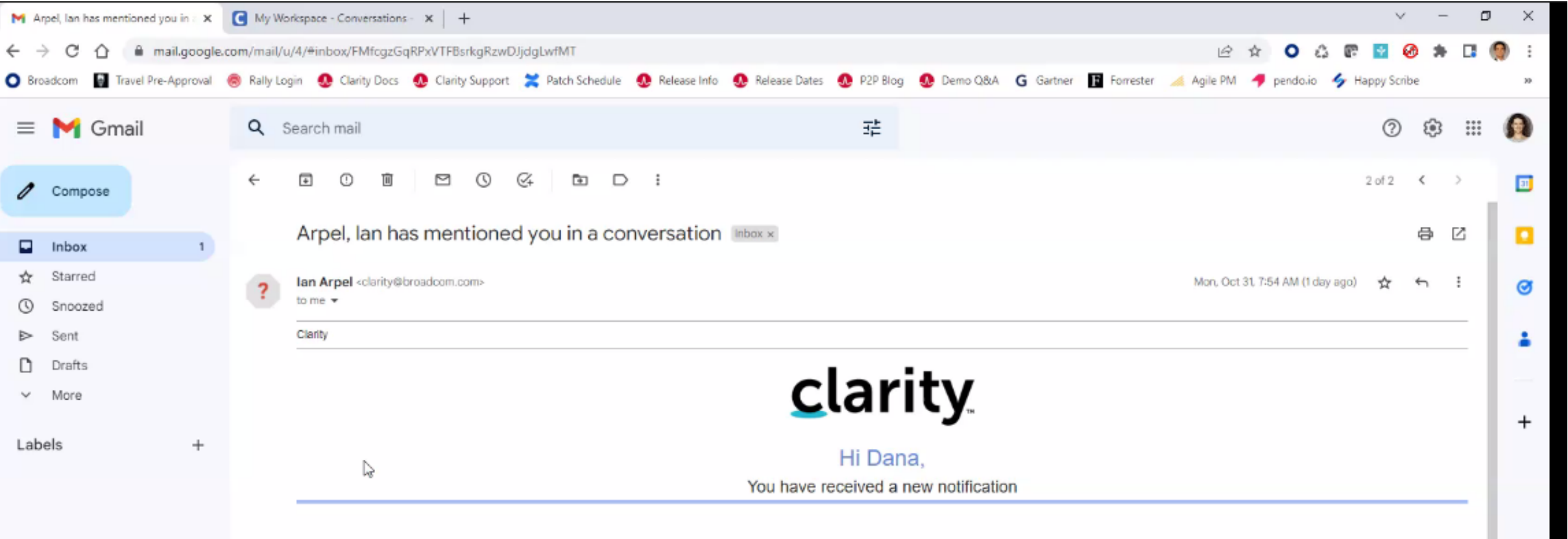
Incidents

Clarity Checklists & To Do's



- Visual widgets on To Do modules within investments
- My Workspace: Conversations and *email notification improvements*

Conversations and email reply



Top Down Planning



- Drag-and-drop ordering of roadmap items in grid
- Filters for 'Has dependencies' & 'Has agreements'
- View option to display names on roadmap events and item events in legend
- Auto-granting Roadmap Navigate right when Sharing

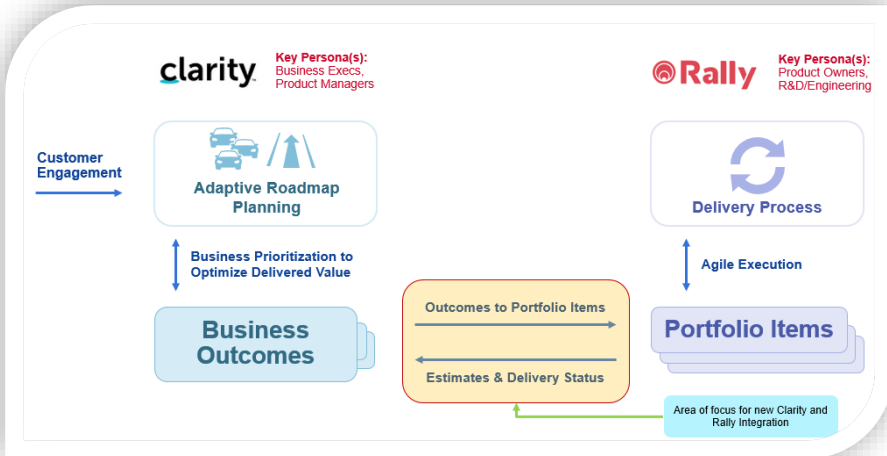
Transforming Financial Management



- Transaction entry via grid
- Field level security (FLS) on Cost Plans/Budgets/Benefit Plans*
- Visual widgets on Investment Cost Plan/Budget/Benefit Plan Detail modules*

- * part of Transforming Investment Management

Clarity Connection Improvements



- Sync individual investments on demand
- Quality-of-Life Improvements
 - Server time zone handling
 - Support for Clarity 'enum' lookups & null values
 - Immediate return of formatted Rally ID following creation from Clarity
 - Sync message indicates 'created in Rally'

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Thank You!

