

What's New in Clarity 16.1.1?

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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

- **Transforming Investment Management**
 - Update Investment boards to v2.0
 - Start to **Advanced Visualizations**
 - Greater flexibility in canvas layout
 - Visual widgets based on subobjects on Investment Canvas
 - Automatic creation of Custom Investment Type (CIT) lookup when CIT is defined
 - Starred for Tasks, including when adding tasks to timesheets
 - Current, Next and Previous as smart filters for timesheet periods
 - Copy custom subobjects as part of template creation in Investments*
- **Reinventing Resource Management**
 - Staffing Timeline: Minimize/maximize workspaces
 - Staffing Timeline: Allocations over & under colorization
 - Staffing Timeline: Easier add of investments and/or resources/roles/teams
 - Staffing Timeline: Additional visibility to easily see unstaffed investments
 - Staff Grid: Navigate to Staff module by clicking Resource Full Name
 - Teams: Ability to see team members in allocation Details panel
- **Lifecycle Management (incl. Demand Mgmt)**
 - Originating Idea (convert Idea to Project) now linkable in Projects grid
 - Action Items: Library
 - Action Items: Send via business rules
 - Action Items: Module on custom master objects
 - Action Items: Separate delete from process delete
 - Action Items: Create purge job
 - Expansion of business rules at part of **Smart Automation**
 - Simpler ways to take simple actions in sequence or together
 - Including setting a field value based on another field change
 - Or Sending an action item
 - **Augmented Audit** capabilities
 - Audit: Module available on blueprintable objects
 - Audit: Changed Date displays Date & Time (not just date)
 - Audit: TSV & Several OOTB MVL attributes available
 - Audit: Assigned Resources & User Groups
- **Business Intelligence & Mobile**
 - Action Items: Mobile
- **Providing Financial Transparency**
 - Additional attributes to compare budget vs plan vs actual*
 - Relabeling & tool tips for Cost Plan Detail & Benefit Plan Detail attributes
 - Multiple lines per grouping attribute combination*
 - Transactions REST API (Inbound)
 - Resource API allows updates to Resource Financial Attributes
- **Clarity Checklists & To Do's**
 - My Workspace: Action Items
 - Investment Manager filter in “All” To Dos grid and Smartlists
 - Improved Link Navigation in To Do Tasks, Risks, Issues, & Changes workspaces
 - Filter groups now available in cross-investment Tasks workspace
- **Clarity Connections (Clarity-Rally)**
 - OKRs: Owner, interim targets, & actuals sync
 - Rally visual indicator for Portfolio Items created from Clarity
- **Customer Voice**
 - Update Custom Master Object boards to v2.0
 - Custom objects/subobjects name field length increased to 256
 - Copy custom objects/subobjects
 - Preview and error handling for custom master object CSV import
 - Update string filters with option to be lookups
 - Expose previously hidden “prefilters” as Required filters (presence required, not values)
 - Separate custom object Navigate right from other rights
 - “Not Securable” filter in Attributes grid
 - Modern UX User Settings for Conversations & Sharing Notifications
- **Top Down Planning**
 - Roadmaps: Upgraded to Board v2.0
 - Hierarchy: Agreements and connector lines in Timeline
 - Hierarchy: Key milestones as Timeline Events
 - Hierarchy: Export Timeline to PDF
 - Hierarchy: Option to configure the Details flyout for certain subobject modules
 - Plans in **Workforce Modeling** BETA
 - Import resources to populate base totals
 - Aggregate views by Role, Employment Type and Investment Category, with additions & reductions
 - Hierarchy plan navigator

Adoption and Usability

- From a usability perspective, the following updates have been included in this release;
 - Decouple the 'Navigate' right from View-All, Create and, Edit-All Custom Objects (CMO) permissions
- From an accessibility perspective, reported issues across (10) WCAG success criterion have been remediated in this release.

Customer Voice: Usability Enhancements



- Custom objects/subobjects name field length increased to 256
- Ability to copy custom objects/subobjects
- Updated preview and error handling for custom master object CSV import
- String filters have been updated with option to be lookups**
- Exposed previously hidden “prefilters” as Required filters (presence required, not values) **
- Modern UX User Settings for Conversations & Sharing Notifications
- Custom Master Object boards has been updated to v2.0**

** These items will be shown in the Investment Management demo



- Update Investment boards to v2.0
 - Start to Advanced Visualizations
 - Greater flexibility in canvas layout
 - Visual widgets based on subobjects on Investment Canvas
 - Automatic creation of Custom Investment Type (CIT) lookup when CIT is defined
 - Starred Tasks – are now available when adding tasks to timesheets**
 - Copy custom subobjects as part of template creation in Investments**
-
- ** This item will be shown in the timesheets demo
 - ** Was shown in the customer voice demo

Providing Financial Transparency



- Additional attributes to compare budget vs plan vs actual
- Relabeling & tool tips for Cost Plan Detail & Benefit Plan Detail attributes
- Multiple lines per grouping attribute combination

- *Transactions REST API (Inbound)*
- *Resource API allows updates to Resource Financial Attributes*

API - Inbound Transactions

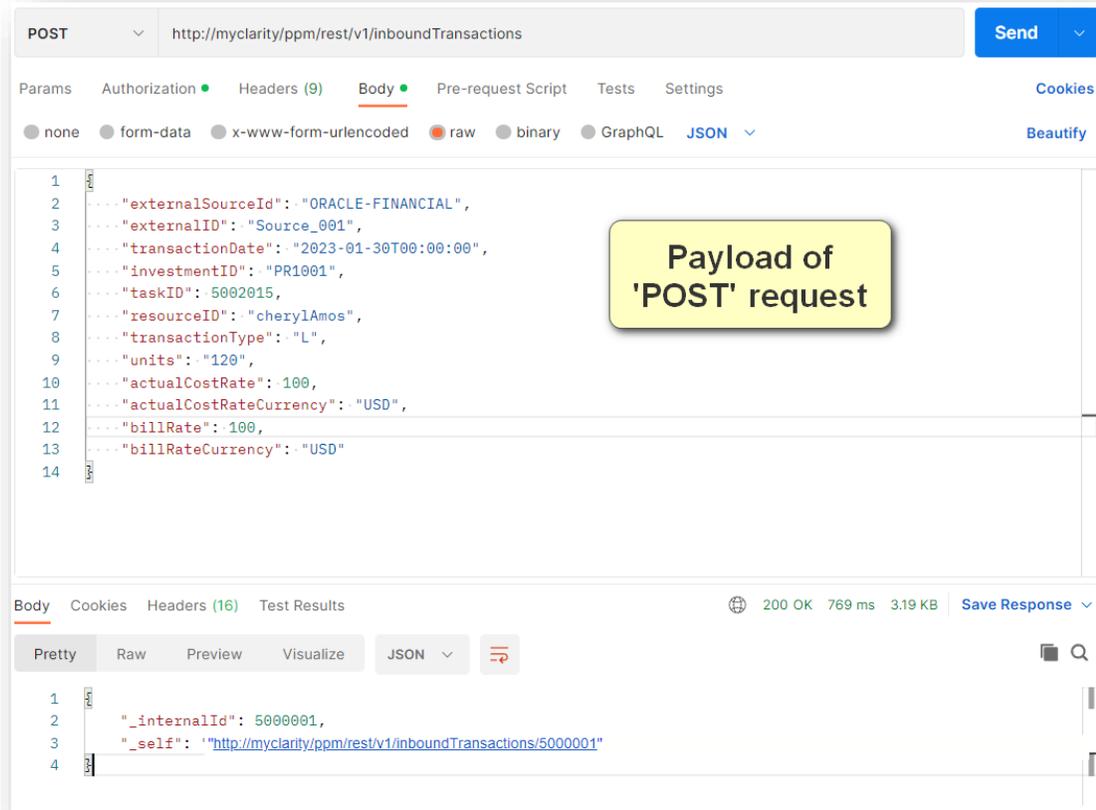
- A new API endpoint “/ppm/rest/v1/inboundTransactions” is available.
- Can be accessed by users having “*Financial Process - Transaction Entry*” right
- Following are the fields served by the API:

Attributes	Data Type
externalSourceId	String
externalID	String
transactionDate	Date
investmentID	Lookup
taskID	Lookup
resourceID	Lookup
roleID (Optional)	Lookup
transactionType	Lookup
importStatus	Lookup
inputTypeCode (Optional)	Lookup
transactionClass (Optional)	Lookup
chargeCode (Optional)	Lookup
userLov1 (Optional)	Lookup
userLov2 (Optional)	Lookup

Attributes	Data Type
chargeable (Optional)	Boolean
notes (Optional)	String
units	Number
actualCostRate	Number
actualCostRateCurrency	Lookup
billRate	Number
billRateCurrency	Lookup
voucherNumber (Optional)	String
groupID (Optional)	String
poNumber (Optional)	String
incurredBy (Optional)	Lookup
vendorCode (Optional)	Lookup
clientID (Optional)	String
expenseType (Optional)	Lookup

API - Inbound Transactions

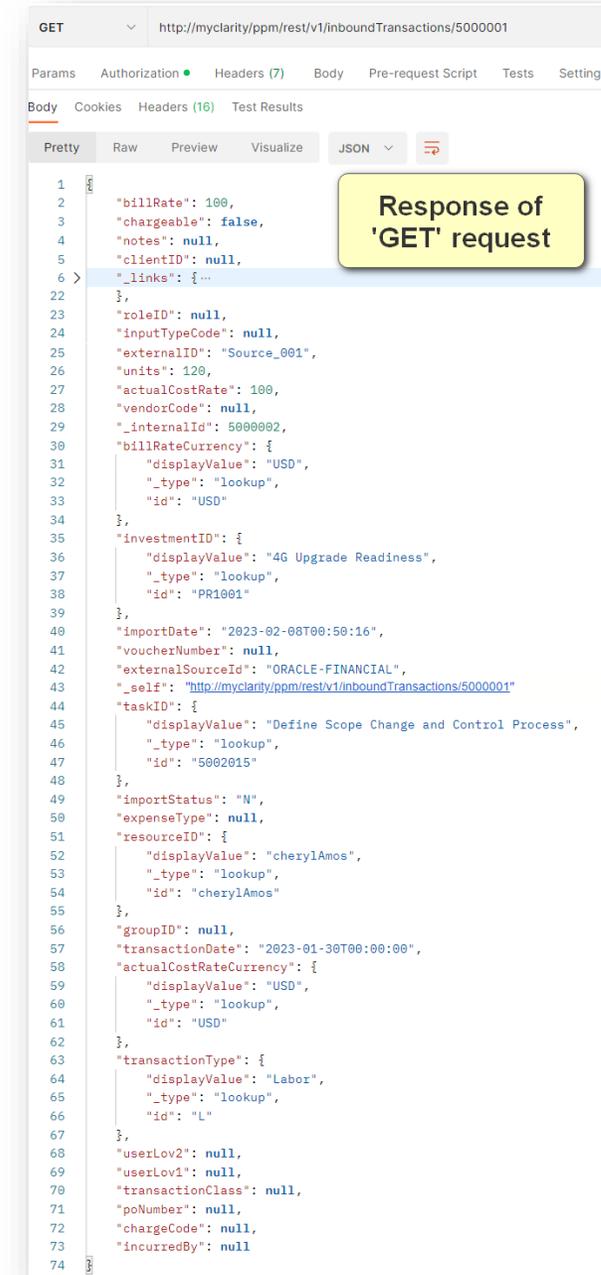
- The API supports “GET” and “POST” methods.
- Note: More details can be found at URL specified under Classic Clarity → Administration → General Settings → System Options → API → API Documentation URL



The screenshot shows a REST client interface with a POST request to `http://myclarity/ppm/rest/v1/inboundTransactions`. The request body is a JSON object with the following fields:

```
1  {
2  ... "externalSourceId": "ORACLE-FINANCIAL",
3  ... "externalID": "Source_001",
4  ... "transactionDate": "2023-01-30T00:00:00",
5  ... "investmentID": "PR1001",
6  ... "taskID": "5002015",
7  ... "resourceID": "cherylAmos",
8  ... "transactionType": "L",
9  ... "units": "120",
10 ... "actualCostRate": 100,
11 ... "actualCostRateCurrency": "USD",
12 ... "billRate": 100,
13 ... "billRateCurrency": "USD"
14 }
```

A yellow callout box labeled "Payload of 'POST' request" points to the JSON body.



The screenshot shows a REST client interface with a GET request to `http://myclarity/ppm/rest/v1/inboundTransactions/5000001`. The response body is a JSON object with the following fields:

```
1  {
2  ... "billRate": 100,
3  ... "chargeable": false,
4  ... "notes": null,
5  ... "clientID": null,
6  ... "_links": { ... },
7  ... },
8  ... "roleID": null,
9  ... "inputTypeCode": null,
10 ... "externalID": "Source_001",
11 ... "units": 120,
12 ... "actualCostRate": 100,
13 ... "vendorCode": null,
14 ... "_internalId": "5000002",
15 ... "billRateCurrency": {
16   ... "displayValue": "USD",
17   ... "_type": "lookup",
18   ... "id": "USD"
19 },
20 ... },
21 ... "investmentID": {
22   ... "displayValue": "4G Upgrade Readiness",
23   ... "_type": "lookup",
24   ... "id": "PR1001"
25 },
26 ... },
27 ... "importDate": "2023-02-08T00:50:16",
28 ... "voucherNumber": null,
29 ... "externalSourceId": "ORACLE-FINANCIAL",
30 ... "_self": "http://myclarity/ppm/rest/v1/inboundTransactions/5000001",
31 ... "taskID": {
32   ... "displayValue": "Define Scope Change and Control Process",
33   ... "_type": "lookup",
34   ... "id": "5002015"
35 },
36 ... },
37 ... "importStatus": "N",
38 ... "expenseType": null,
39 ... "resourceID": {
40   ... "displayValue": "cherylAmos",
41   ... "_type": "lookup",
42   ... "id": "cherylAmos"
43 },
44 ... },
45 ... "groupID": null,
46 ... "transactionDate": "2023-01-30T00:00:00",
47 ... "actualCostRateCurrency": {
48   ... "displayValue": "USD",
49   ... "_type": "lookup",
50   ... "id": "USD"
51 },
52 ... },
53 ... "transactionType": {
54   ... "displayValue": "Labor",
55   ... "_type": "lookup",
56   ... "id": "L"
57 },
58 ... },
59 ... "userLov2": null,
60 ... "userLov1": null,
61 ... "transactionClass": null,
62 ... "poNumber": null,
63 ... "chargeCode": null,
64 ... "incurredBy": null
65 }
```

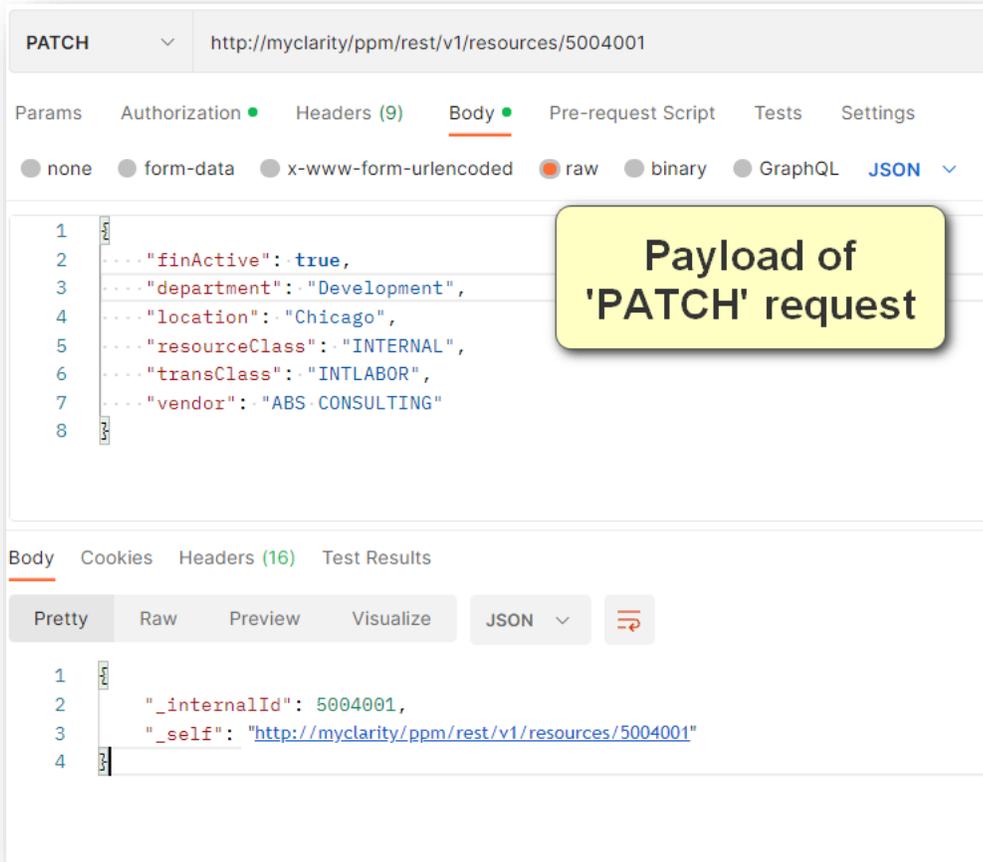
A yellow callout box labeled "Response of 'GET' request" points to the JSON body.

Resource API to Update Financial Attributes

- Existing **resources** API (/ppm/rest/v1/resources) now supports the following additional Financial attributes for both GET and PATCH methods

Attribute	API Alias	Data Type
Financially Active	finActive	Boolean
Department	department	Lookup
Location	location	Lookup
Resource Class	resourceClass	Lookup
Transaction Class	transClass	Lookup
Vendor	vendor	Lookup

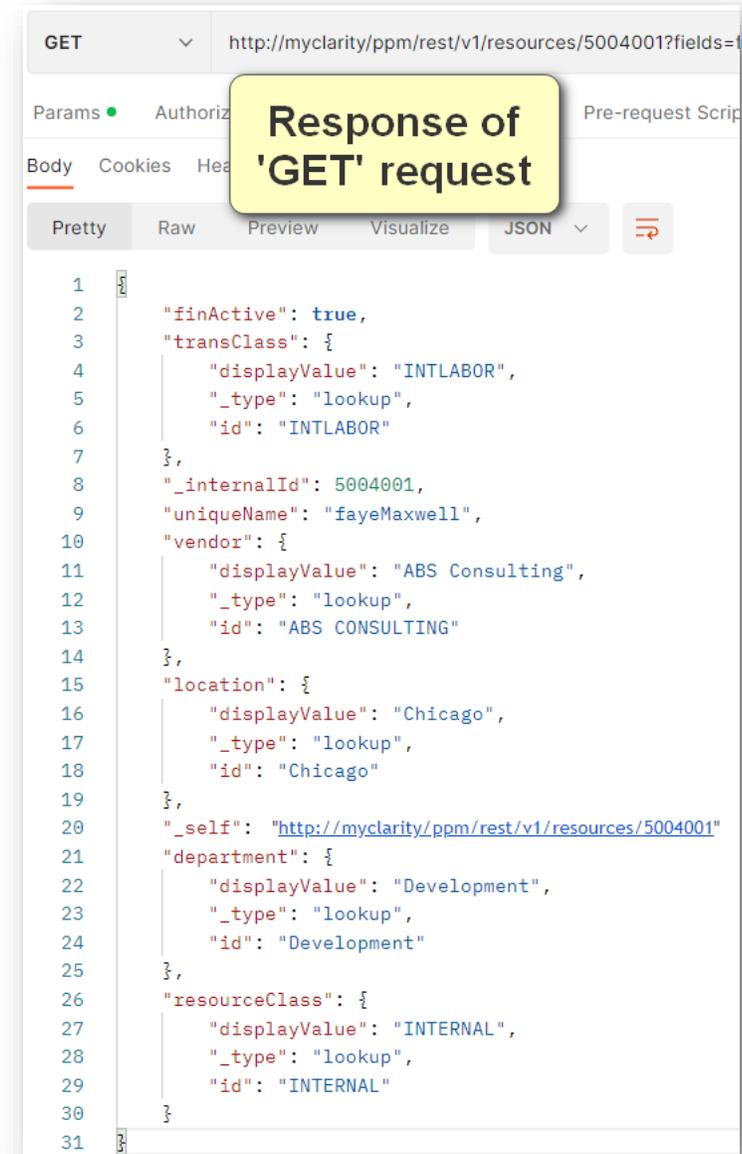
Resource API to View and Update Financial Attributes



The screenshot shows a REST client interface for a PATCH request to the URL `http://myclarity/ppm/rest/v1/resources/5004001`. The request body is in JSON format and contains the following payload:

```
1 {
2   "finActive": true,
3   "department": "Development",
4   "location": "Chicago",
5   "resourceClass": "INTERNAL",
6   "transClass": "INTLABOR",
7   "vendor": "ABS CONSULTING"
8 }
```

A yellow callout box with the text "Payload of 'PATCH' request" is overlaid on the right side of the screenshot.



The screenshot shows a REST client interface for a GET request to the URL `http://myclarity/ppm/rest/v1/resources/5004001?fields=`. The response body is in JSON format and contains the following response:

```
1 {
2   "finActive": true,
3   "transClass": {
4     "displayValue": "INTLABOR",
5     "_type": "lookup",
6     "id": "INTLABOR"
7   },
8   "_internalId": 5004001,
9   "uniqueName": "fayeMaxwell",
10  "vendor": {
11    "displayValue": "ABS Consulting",
12    "_type": "lookup",
13    "id": "ABS CONSULTING"
14  },
15  "location": {
16    "displayValue": "Chicago",
17    "_type": "lookup",
18    "id": "Chicago"
19  },
20  "_self": "http://myclarity/ppm/rest/v1/resources/5004001"
21  "department": {
22    "displayValue": "Development",
23    "_type": "lookup",
24    "id": "Development"
25  },
26  "resourceClass": {
27    "displayValue": "INTERNAL",
28    "_type": "lookup",
29    "id": "INTERNAL"
30  }
31 }
```

A yellow callout box with the text "Response of 'GET' request" is overlaid on the top right of the screenshot.



- Starred Tasks – are now available when adding tasks to timesheets
- Current, Next and Previous as smart filters for timesheet periods

Reinventing Resource Management



Staffing Timeline

- Allocations over & under colorization
- Easier add of investments and/or resources/roles/teams with right click
- Minimize/maximize workspaces
- Ability to see team members in allocation Details panel
- Additional visibility to easily see unstaffed investments

Staff Grid

- Navigate to Staff module by clicking Resource Full Name



Originating Idea (convert Idea to Project) now linkable in Projects grid

Action Items

- Library & Send via business rules

Augmented Audit capabilities

- Module available on blueprintable objects
 - Changed Date displays Date & Time (not just date)
 - TSV & Several OOTB MVL attributes available
-
- *Action Items: Purge Job*
 - *Audit: Assigned Resources & User Groups*

New Classic Job: Purge Action Items

Clarity

Job Type: Purge Action Items - Job Properties

General

JOB NAME
Purge Action Items

Parameters

TYPE

STATUS
Open
Closed

FROM CREATED DATE
Specific Date
Relative Date [-- Select --]

TO CREATED DATE
Specific Date
Relative Date [-- Select --]

SAVE PARAMETERS

Select Purge Action Item Types

NAME
LOOKUP_CODE

FILTER SHOW ALL CLEAR

<input type="checkbox"/>	name	lookup_code
<input type="checkbox"/>	Blueprint	CAL_BLUEPRINT
<input type="checkbox"/>	Issue	CAL_ISSUE
<input type="checkbox"/>	Personal	CAL_PERSONAL
<input type="checkbox"/>	Process	CAL_WORKFLOW
<input type="checkbox"/>	Project	CAL_PROJECT
<input type="checkbox"/>	Risk	CAL_RISK

Displaying 1 - 6 of 6

ADD ADD AND SELECT MORE RETURN

Purging Action Items

Before 16.1.1:

- Action Items (non-personal) could not be deleted directly
- Action Items (non-personal) would only get deleted when an associated Process is deleted and the Action Item history would be lost

After 16.1.1:

- Updated existing Delete Process Instance job to no longer delete associated Action Items
 - Although the Action Item's relationship to the Process is removed, the Object association will remain
- Added a new Purge Action Items job which will enable Customers to directly delete and control the deletion of Action Items by: Type, Status (Open or Closed), and Created Date range
- **Note:** Action Items are not deleted if they are associated to process instances that are not completed or cancelled

Audit: Assigned Resources

clarity [← Project](#) ABLE Payments Mod
PR200

Dashboard Properties Tasks Financials Action Items **Audit** Status Baselines Staff Assignments

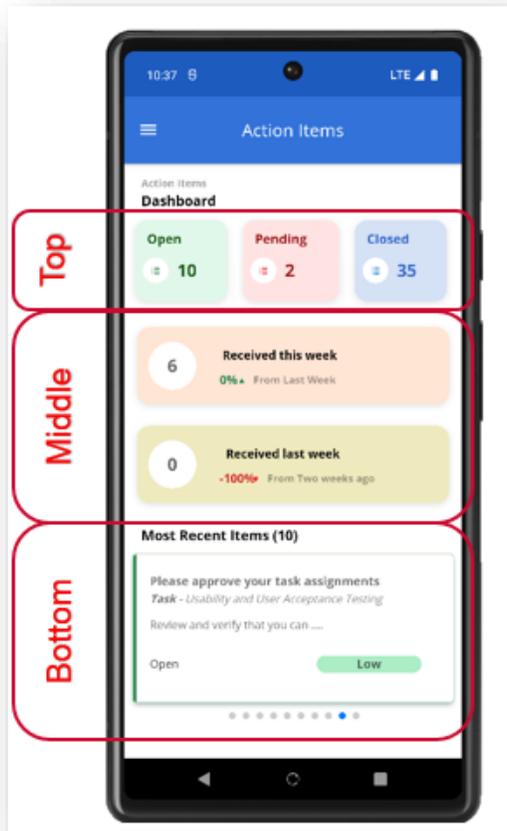
Match Filters **All** Any [Add Filter Groups](#)

Object = Team; Task [+ Add Filter](#) [Remove All](#)

AND **Changed Date = 10 Days Before To Current Date**

Group By

Object	Record	Attribute	Operati...	Changed By	Changed Date	Old Value
Task	Functional and Syst...	Assigned Resources	Update	Arpel, Ian	Feb 09, 2023 10:21 am	
Team	Garcia, Alex	Allocation	Update	Arpel, Ian	Feb 07, 2023 3:01 pm	33
Team	Arpel, Ian	Allocation	Update	Arpel, Ian	Feb 09, 2023 8:21 am	
Team	Amos, Cheryl	Allocation	Update	Arpel, Ian	Feb 09, 2023 10:21 am	



- Action Items are available in Mobile App in app version 3.2.0.
- Action Item dashboard to display action items based on received date and status.
- Quickly access pre-filtered action items.
- Ability to filter for action items based on multiple criteria.
- View action item history and act on actions items as needed.
- Manage notes at the timesheet level, in addition the existing task level notes.

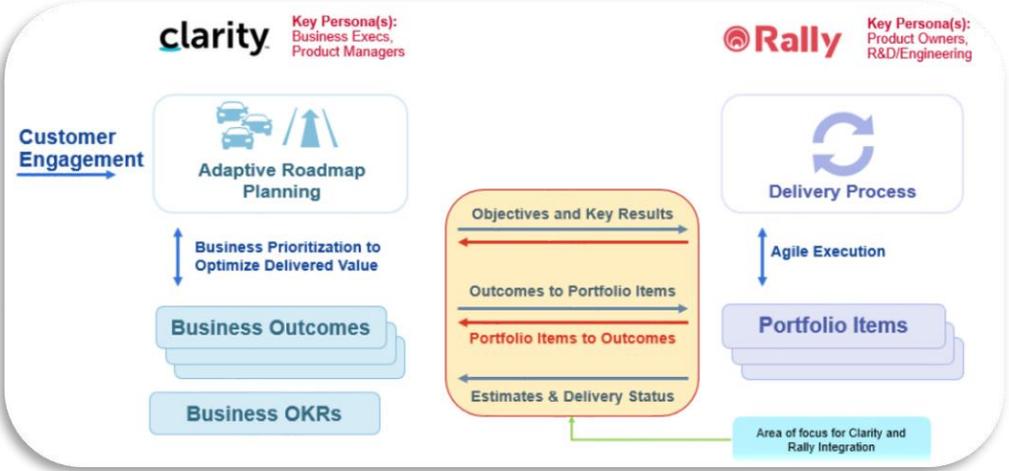
Checklists & To Dos



- My Workspace: Includes action items **
- To Do's:
 - “All” To Dos grid and Smartfilters Includes an Investment Manager filter
 - Investments Tab: Enhanced navigation from workspace linking
 - Tasks Tab: Filter groups now available in cross-investment

** This item was shown in the Action Items demo

Clarity Connection Improvements



- *OKRs: Owner, interim targets, & actuals sync*
- *Rally visual indicator for Portfolio Items created from Clarity*

Top Down Planning



Roadmaps: Upgraded to Board v2.0

Hierarchy

- Agreements and connector lines in Timeline
- Key milestones as Timeline Events
- Export Timeline to PDF

Plans in Workforce Modeling **BETA**

- Import resources to populate base totals
- Aggregate views by Role, Employment Type and Investment Category, with additions & reductions
- Hierarchy plan navigator

- **Clarity Newsletters**

- **Monthly newsletter** to stay abreast of what is happening in the world of Clarity. You'll find the latest product updates, news and resources to help you get the most out of your solution.
- Subscribe to the Monthly Clarity newsletter [here](#).

- **Clarity Community – Blogs, Discussions, Webinar Events & Groups**

- **Daily** - Join the Clarity Community. We have something for everyone.
- **Blogs** – Find interesting topics, including product updates or How to Prepare for Day One in the New Digital World.
- **Webinars and Events** – Check out the list of events and register for one or more webinars.
- **Groups** – Join a regional user group, live or virtual, and network with your peers.
- To join, use this link community.broadcom.com

- **Clarity Customer Validation Sprints**

- **Quarterly sprint releases** to interact with the new features and be the first to socialize with stakeholders and co-workers on use cases and workflows. To be invited to one of the release validation sprints, please contact linda.chase@broadcom.com

Overview | SPM Journey Continued



Key Details

- Date – March 22, 2023
- Time – 1 to 2pm
- Platform – Digital, Simulive
- **Customer Speakers:**
 - The Boeing Company
 - Federal Reserve System
 - Brian - Moderator

BrightTalk -- Registration



THANK YOU

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