What’s New in Clarity 16.1.1?

Linda Chase

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

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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.

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Customer Voice: Usability Enhancements

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- 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

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Transforming Investment Management

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- 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

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Providing Financial Transparency

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- 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*

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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	DataType
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	DataType
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

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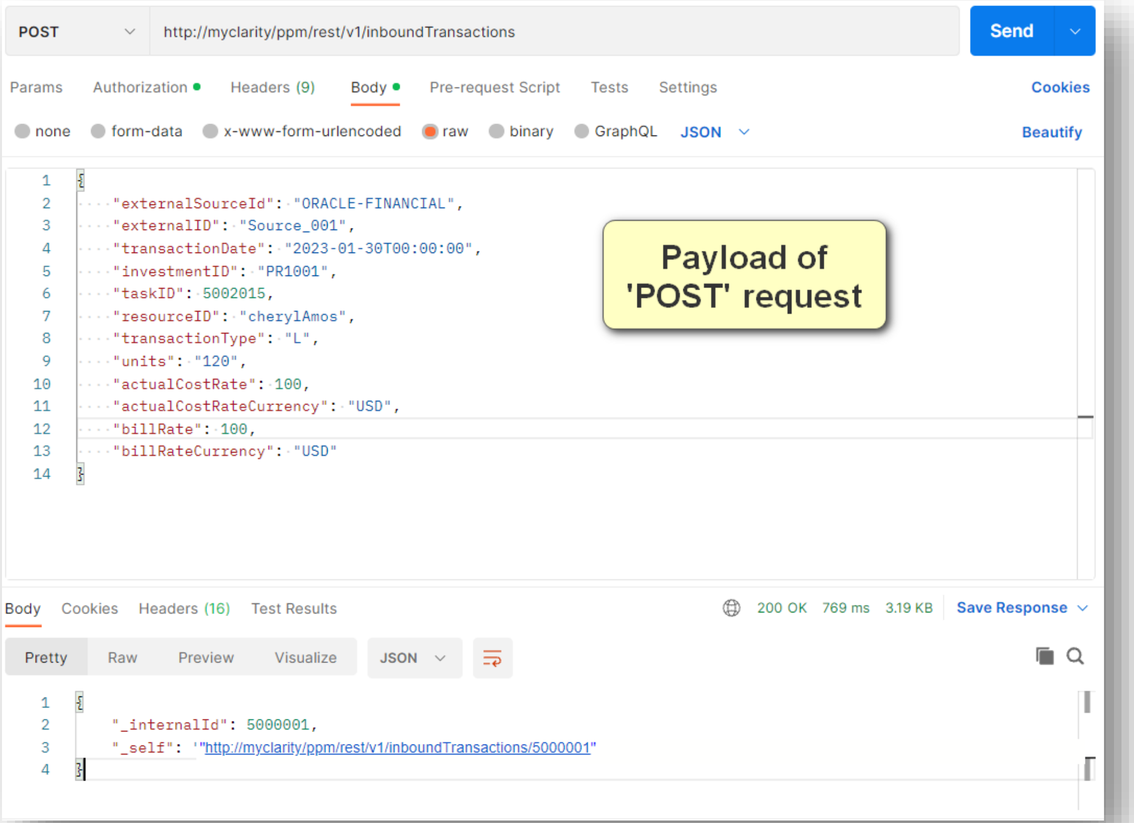
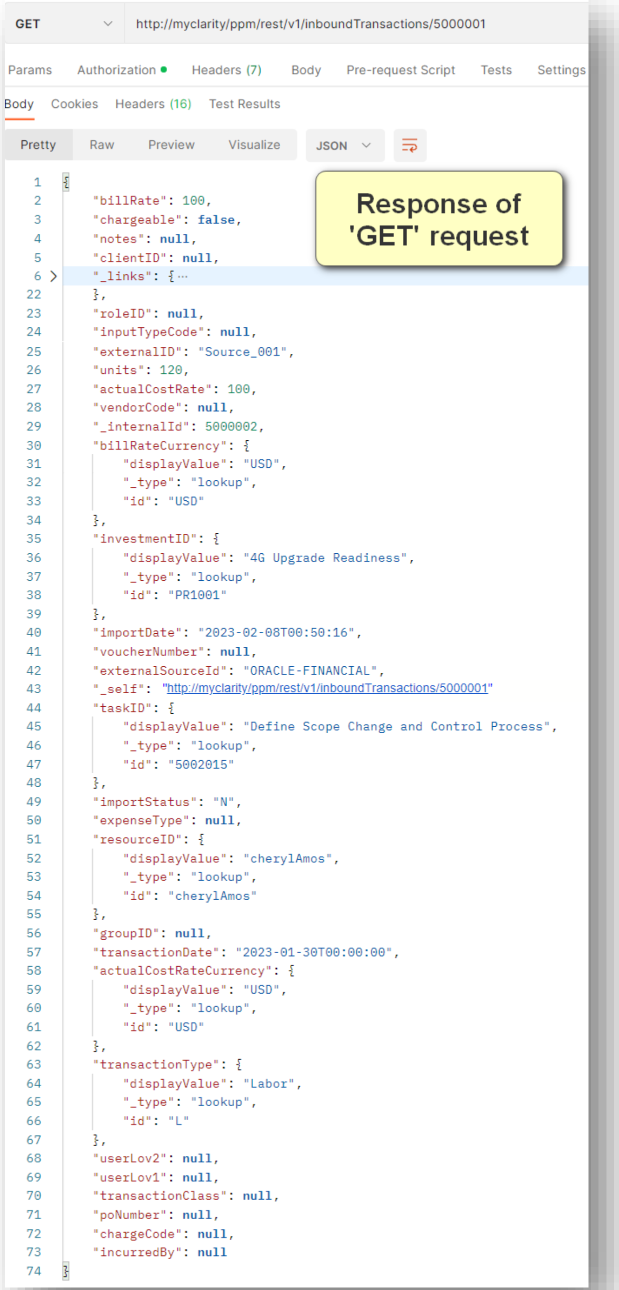
API - Inbound Transactions

- 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





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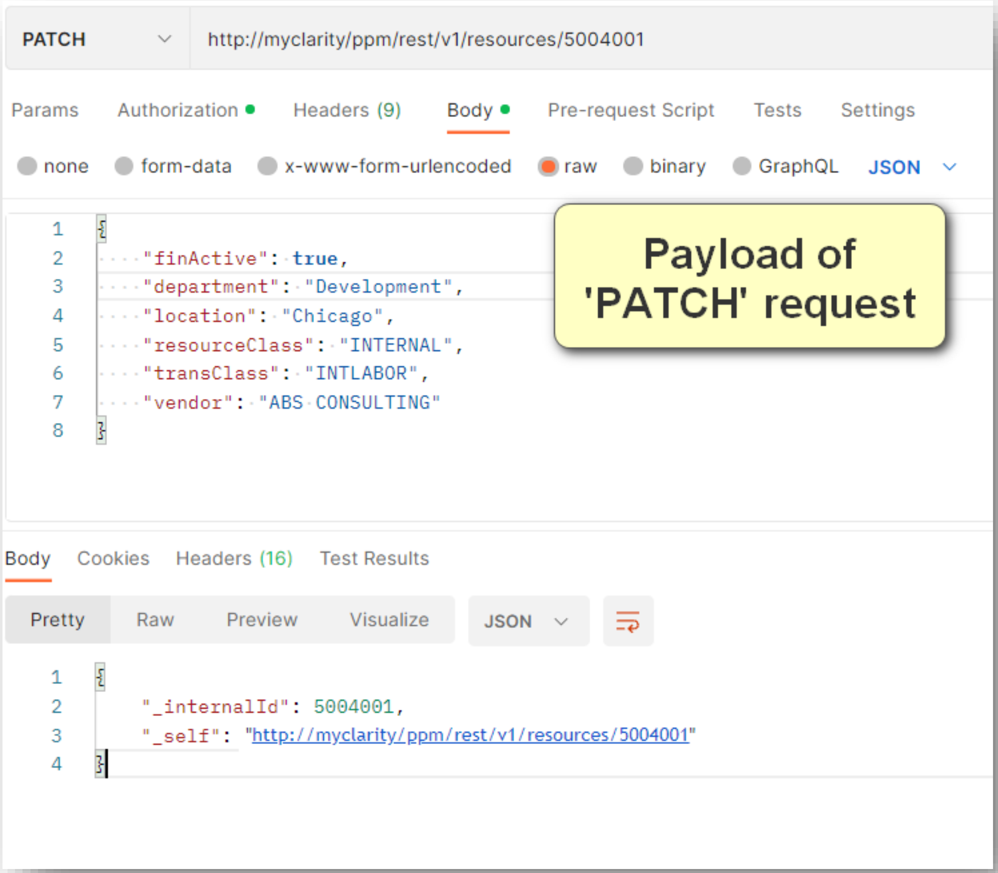
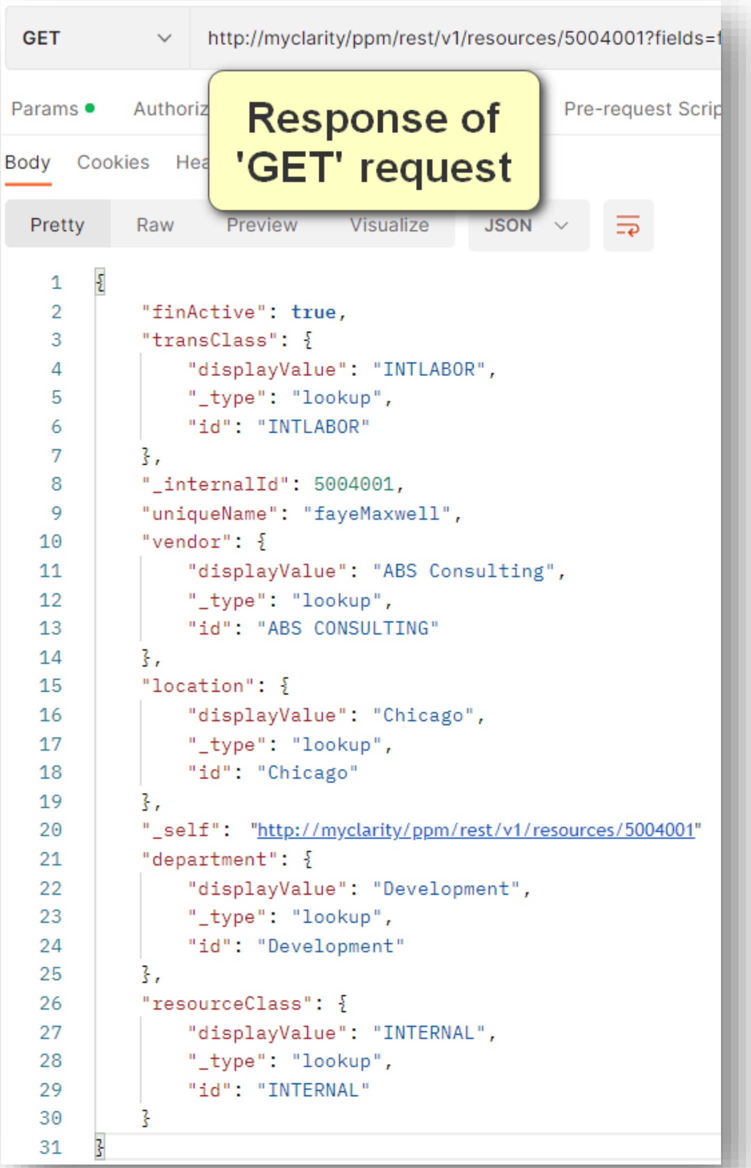
Resource API to Update Financial Attributes

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

Attribute	API Alias	DataType
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





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Timesheets

- 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
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Staff Grid

- Navigate to Staff module by clicking Resource Full Name

Lifecycle Management (incl. Demand Mgmt)

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Action Items

- Library & Send via business rules

Augmented Audit capabilities

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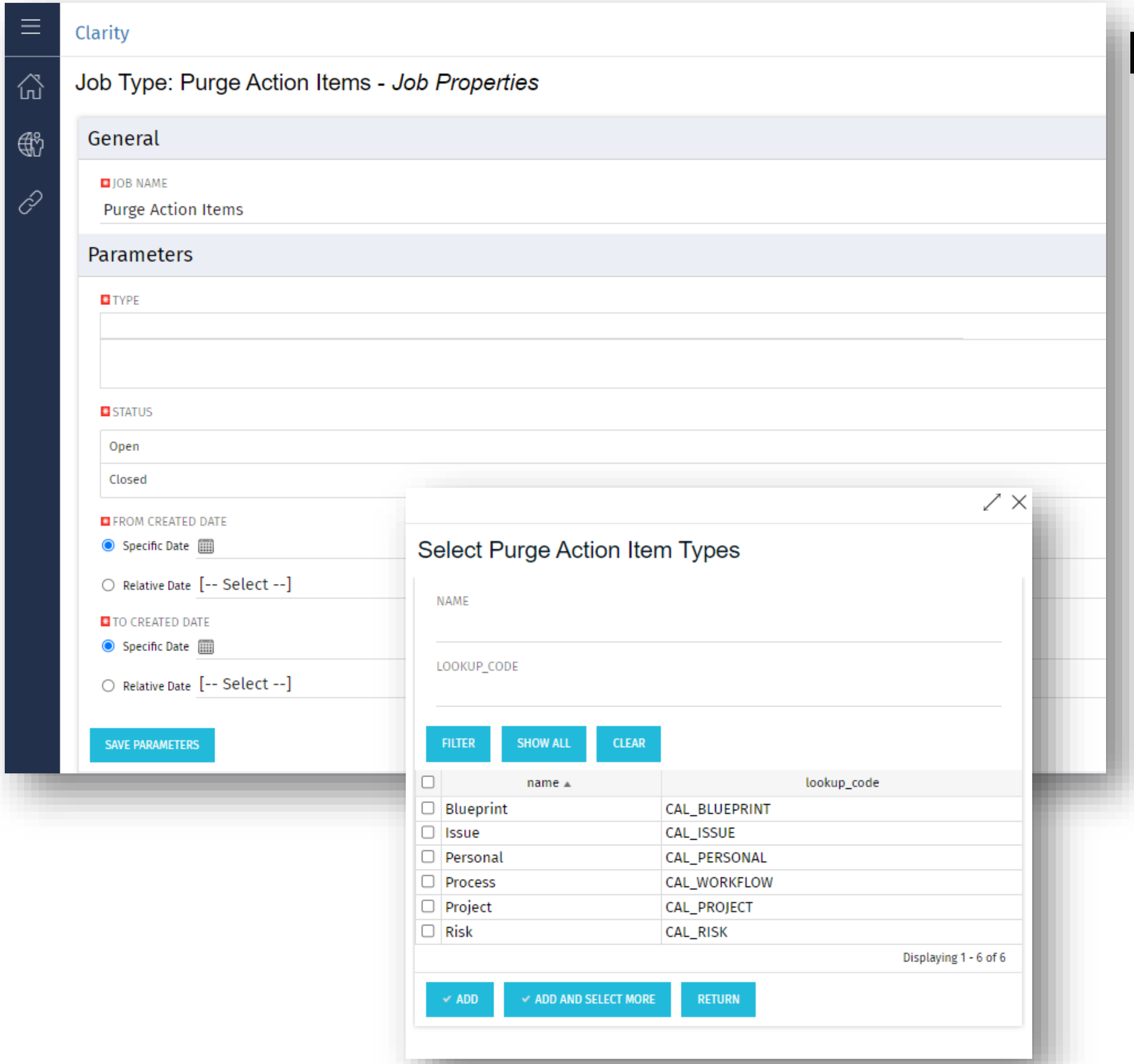
- TSV & Several OOTB MVL attributes available

- *Action Items: Purge Job*
- *Audit: Assigned Resources & User Groups*

New Classic Job: Purge Action Items



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

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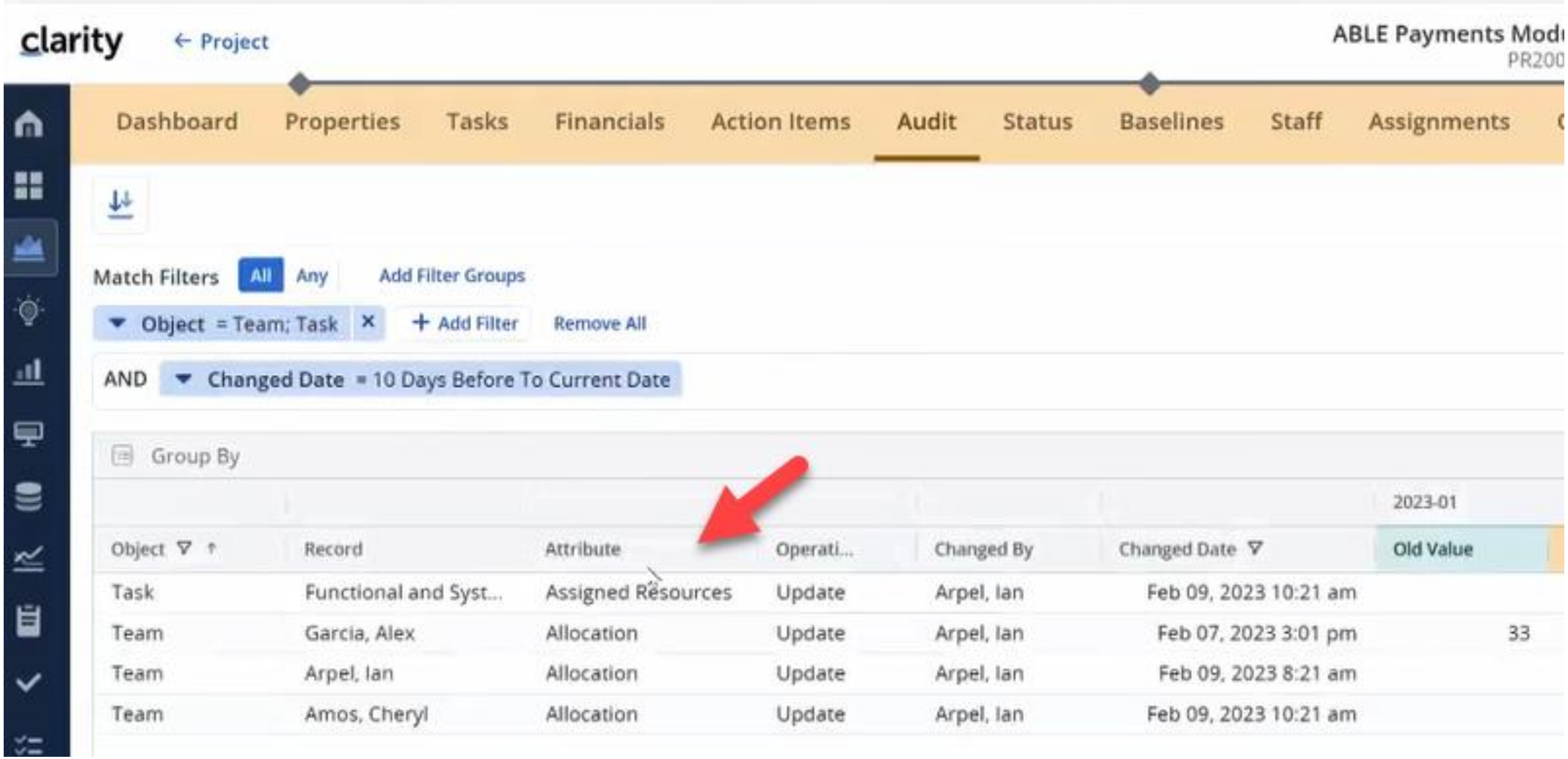
Audit: Assigned Resources



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Mobile App Update

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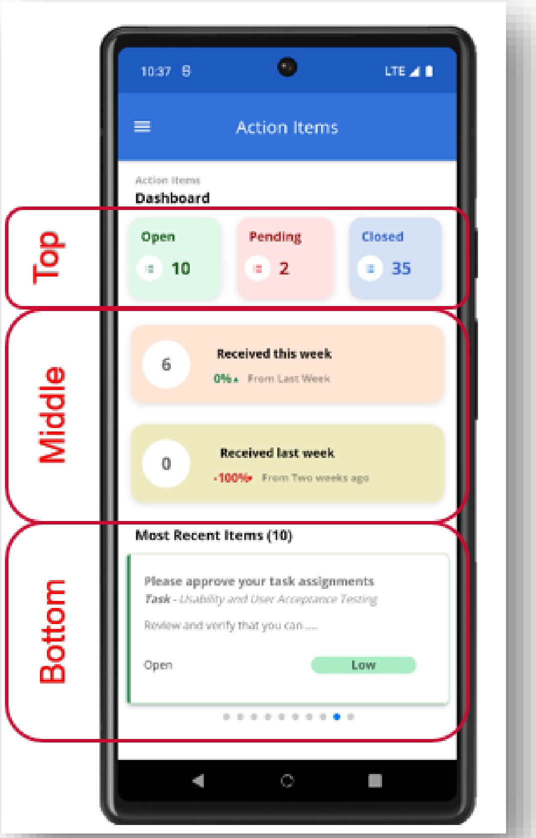

- Action Items are available in Mobile App in app version 3.2.0.
- Action Item dashboard to display action items based on received date and status.
- Quickly access pre-filtered action items.
- Ability to filter for action items based on multiple criteria.
- View action item history and act on actions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

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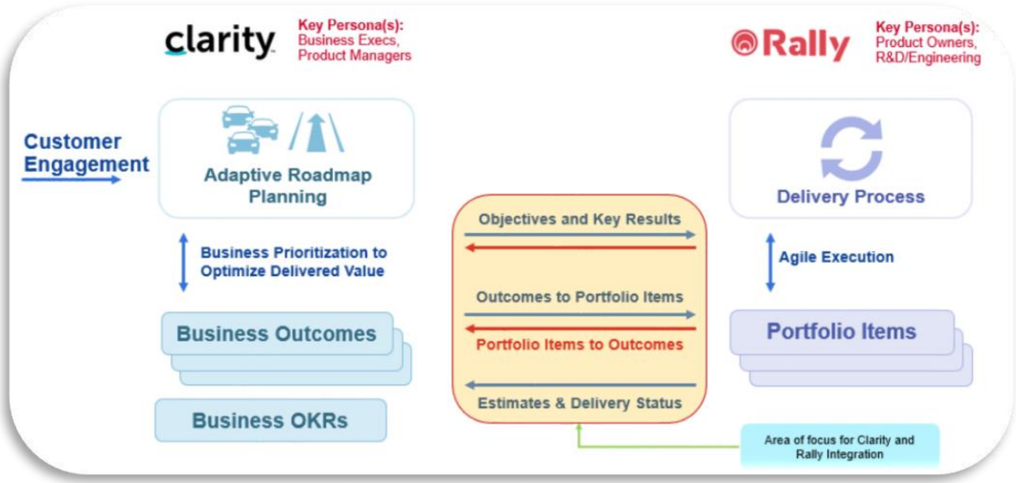
Checklists & To Dos

- 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*
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Top Down Planning

Roadmaps: Upgraded to Board v2.0

Hierarchy

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Plans in Workforce Modeling BETA

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Stay Informed and Keep Connected

- **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]

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