Clarity roadmap

October 2020

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Getting More Value from Clarity

WEEKLY	MONTHLY		QUARTERLY	SEMIANNUALLY
Office Hours **40 ATTENDEES** ***Relationship-building*** *open conversations between customers and Product Management*	**Roadmap Review** **110 ATTENDEES** *Gives customers* ***confidence and validates our strategy***	**End to End Demo** **200 ATTENDEES** ***Drives awareness & adoption*** *by showcasing product capabilities.*	**Release Preview** **300 ATTENDEES** *Go-to-Market for the release allows us to* ***take credit for the value delivered***	**User Groups** **600 ATTENDEES** *Regional meetings featuring customer presentations that* ***promote our community***
	Innovation Call **40 ATTENDEES** *Customers* ***participate in prioritization*** *by pitching ideas & voting*	**Design Studio** **15 ATTENDEES** ***Open discussion*** *between UX and customers* ***on use cases***	**Value Validation** **6 ATTENDEES** *3 day customer-led sprint where they* ***use the new features & provide feedback***	**CAB** **10 ATTENDEES** *Forum for large customers to* ***share experiences*** *& identify* ***industry trends***

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Clarity Release Schedule

Release	Release Date (Projected)
15.8.1 (Rollins)	June 29, 2020
15.9 (Shaw)	November 2020
15.9.1 (2021 - P1)	February 2020
16.0 (2021 - P2)	May 2021
16.0.1 (2021 - P3)	August 2021

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We've delivered a lot in this past year….

- Boards for all investment types (Projects, Ideas, & Custom Investment Types (CITs))
- Common component grids w/ saved views, filtering, configurable flyouts, group by & export to CSV (>250K)
  - All but 4 grids in the system
- Timesheets & Assignments grids that did not exist in Classic (incl. ability to export)
- CITs can now have Tasks (as well as Staff, Links, Assignments, & Cost Plans) unlike NPIOs
- Configurable Living Status Report (select fields as well as tables of Tasks, Risks, Issues & Changes)
- Improved import to roadmaps (now based on most fields, not just individual selection or OBS)
- Full financial capabilities (Cost Plans, Budgets AND Benefits Plans)
- Field level security for Investments, which did not exist in Classic
- Menu level links to punch into classic or out to 3rd party locations
- New Hierarchy workspace
- Ability to configure Modern UX logo & introduction of Classic Phoenix UX theme
- Custom object & first level sub object support as well as REST API public support

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Planned

15.9 – November 2020

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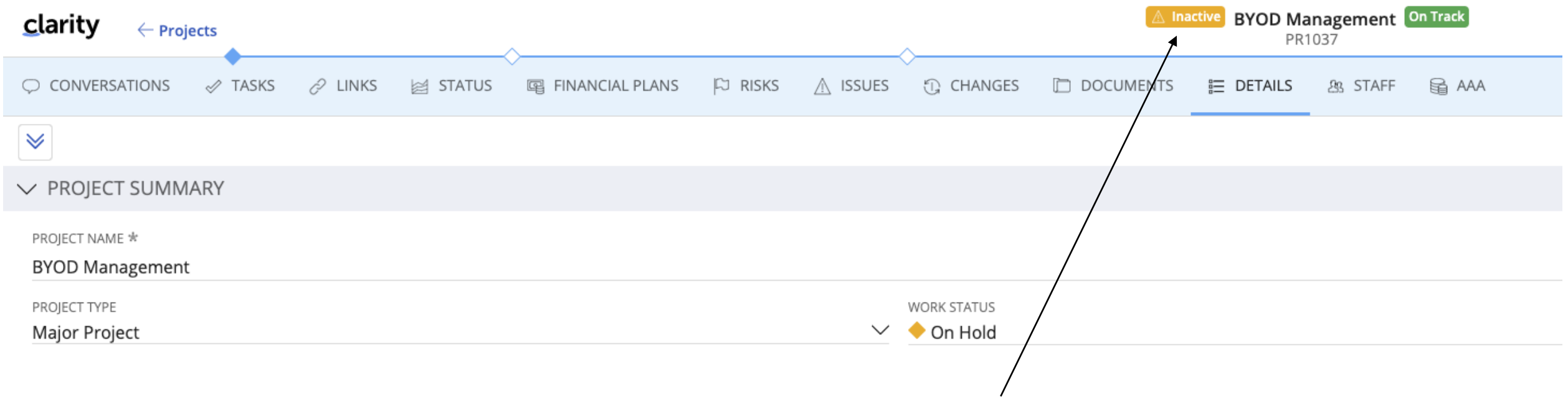
Display Inactive – Inactive Projects Ideas, CIT

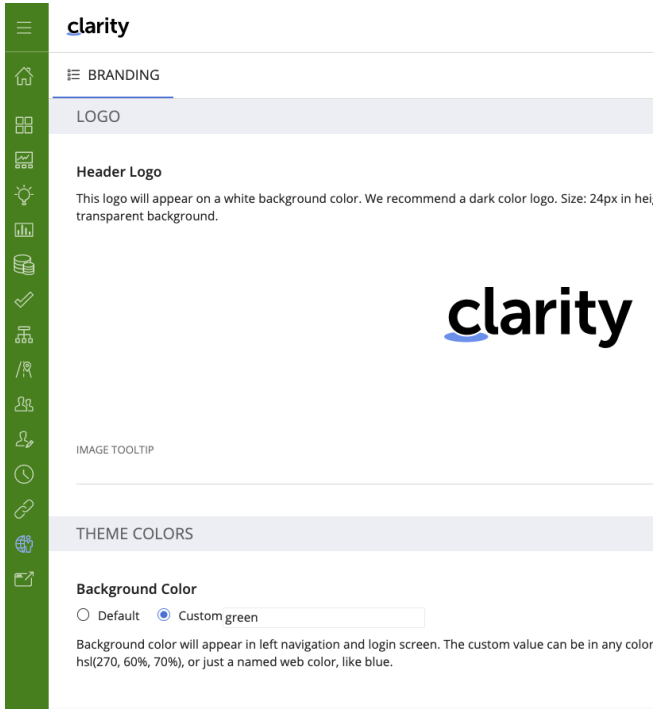


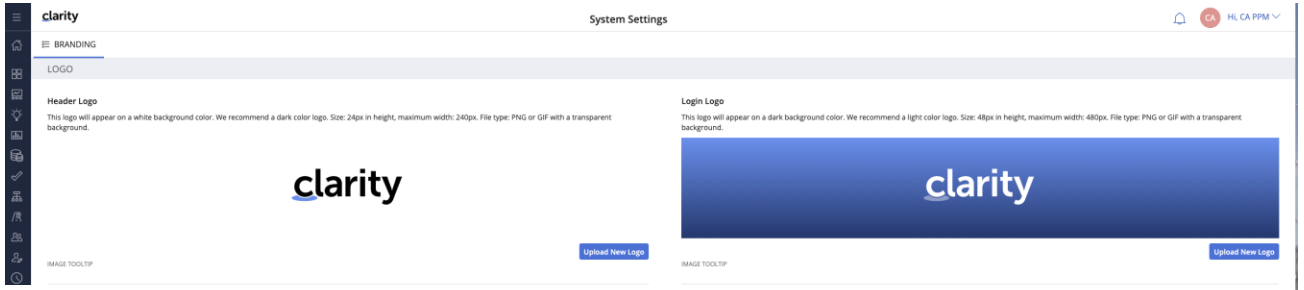
When an investment is marked as Inactive, display beside the name.

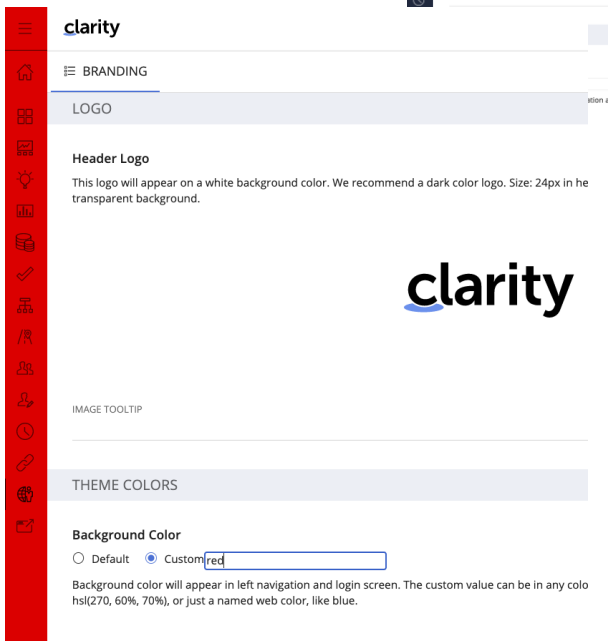
This is the first introduction of Business Rules

Usable Making it easy to understand the status

Colors – Different Login and Menu colors for each Instance





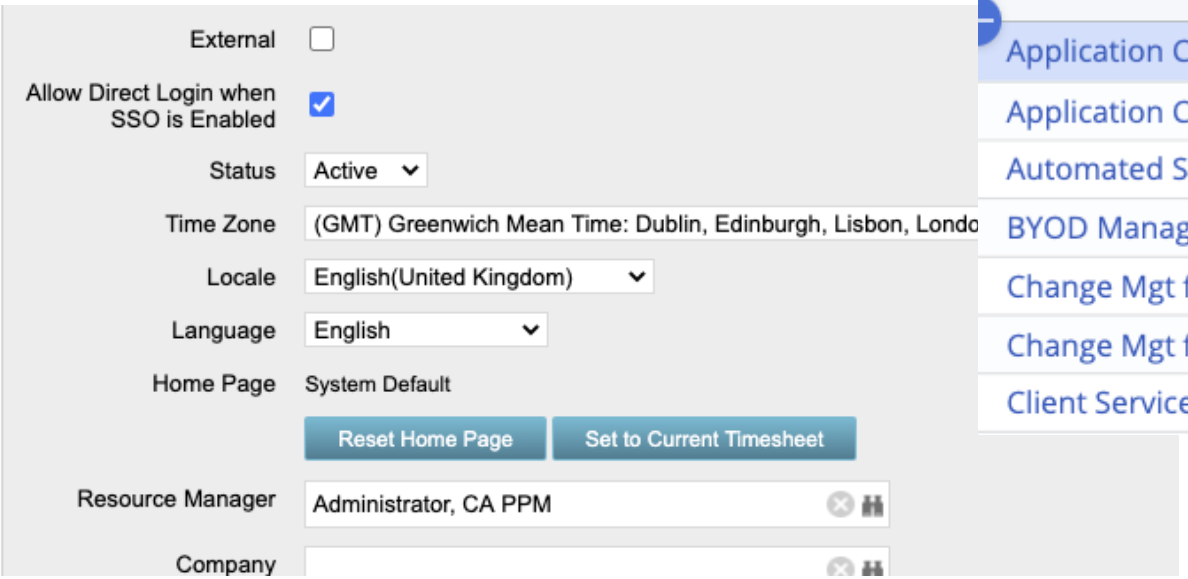


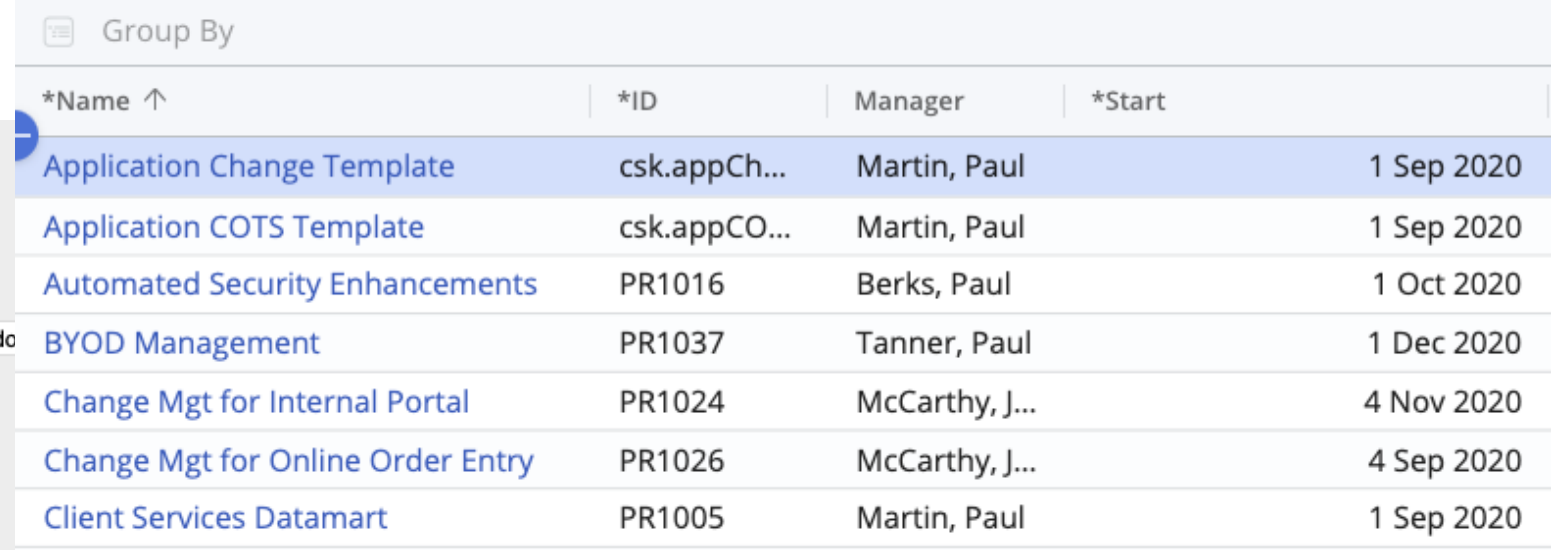
- Control login and Menu colors
- Light or Dark foreground (Text and Icons)

Usable

Dev / Test / Prod colorization – Personalized Corporate Colors

Localization – Date Support



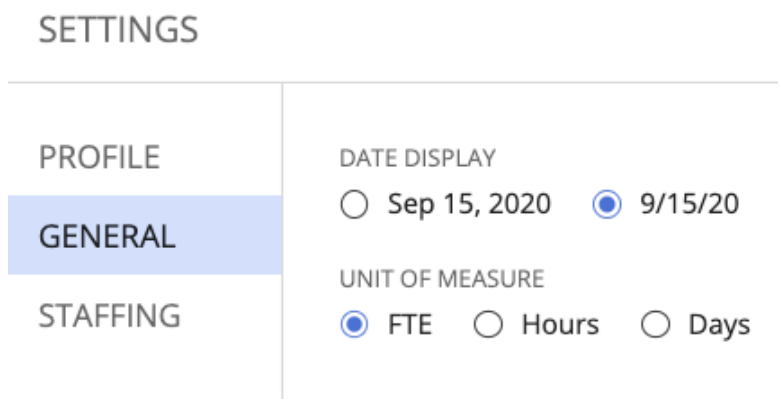


Usable Support for Localization

Localization – Date Format Personalization

*Name	Manager	*Start
Application Change Template	Martin, Paul	Sep 1, 2020
Application COTS Template	Martin, Paul	Sep 1, 2020
Automated Security Enhancements	Berks, Paul	Oct 1, 2020
BYOD Management	Tanner, Paul	Dec 1, 2020
Change Mgt for Internal Portal	McCarthy, J...	Nov 4, 2020

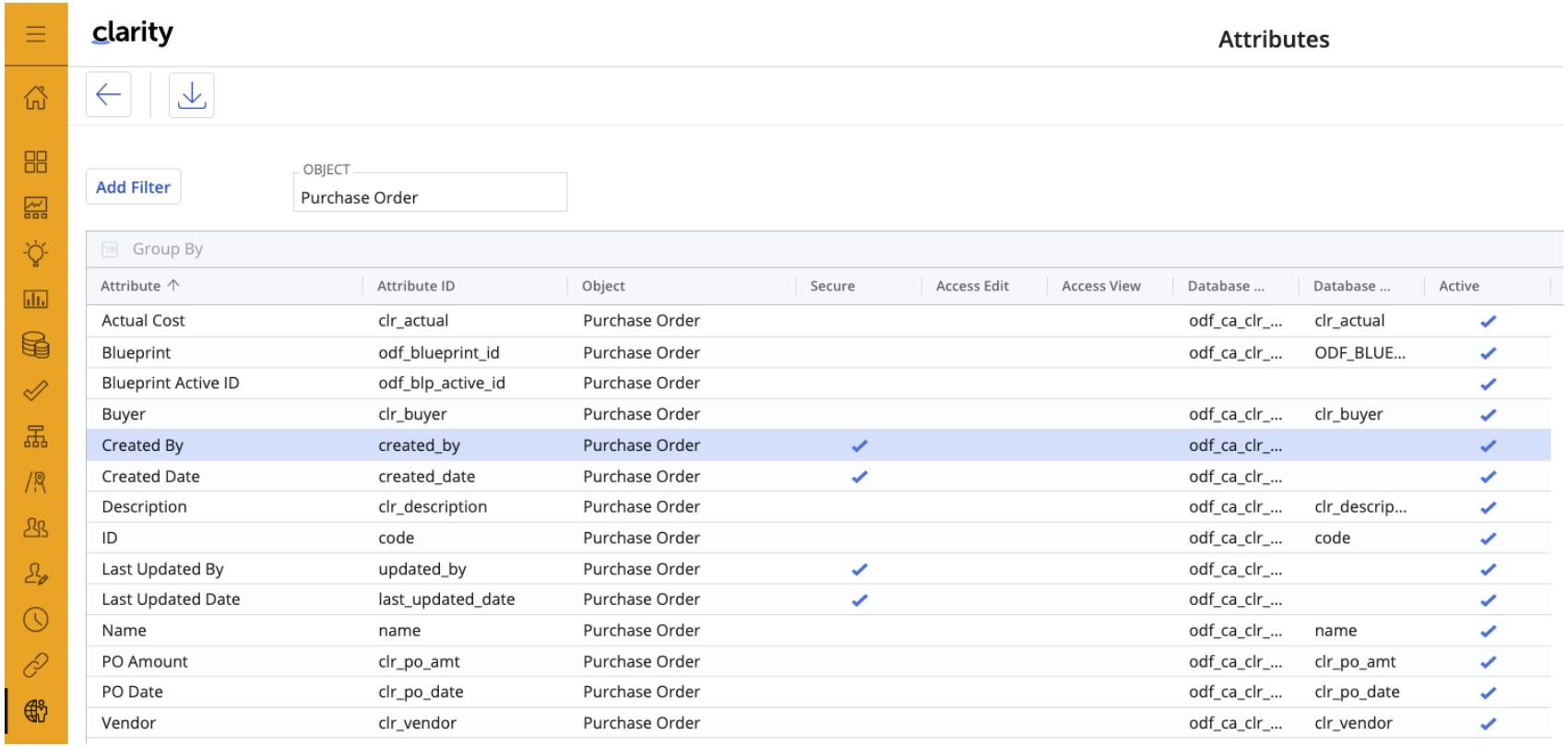
*Name	Manager	*Start
Application Change Template	Martin, Paul	9/1/20
Application COTS Template	Martin, Paul	9/1/20
Automated Security Enhancements	Berks, Paul	10/1/20
BYOD Management	Tanner, Paul	12/1/20
Change Mgt for Internal Portal	McCarthy, J...	11/4/20



- Change your settings for your preferred display
- Type date directly using multiple formats

Simple Support for Localization

Field Level Security – Custom Master Objects



Attribute	Attribute ID	Object	Secure	Access Edit	Access View	Database ...	Database ...	Active
Actual Cost	clr_actual	Purchase Order				odf_ca_clr_...	clr_actual	✓
Blueprint	odf_blueprint_id	Purchase Order				odf_ca_clr_...	ODF_BLUE...	✓
Blueprint Active ID	odf_blp_active_id	Purchase Order						✓
Buyer	clr_buyer	Purchase Order				odf_ca_clr_...	clr_buyer	✓
Created By	created_by	Purchase Order	✓			odf_ca_clr_...		✓
Created Date	created_date	Purchase Order	✓			odf_ca_clr_...		✓
Description	clr_description	Purchase Order				odf_ca_clr_...	clr_descrip...	✓
ID	code	Purchase Order				odf_ca_clr_...	code	✓
Last Updated By	updated_by	Purchase Order	✓			odf_ca_clr_...		✓
Last Updated Date	last_updated_date	Purchase Order	✓			odf_ca_clr_...		✓
Name	name	Purchase Order				odf_ca_clr_...	name	✓
PO Amount	clr_po_amt	Purchase Order				odf_ca_clr_...	clr_po_amt	✓
PO Date	clr_po_date	Purchase Order				odf_ca_clr_...	clr_po_date	✓
Vendor	clr_vendor	Purchase Order				odf_ca_clr_...	clr_vendor	✓

Usable Making it easy to secure your data in custom objects

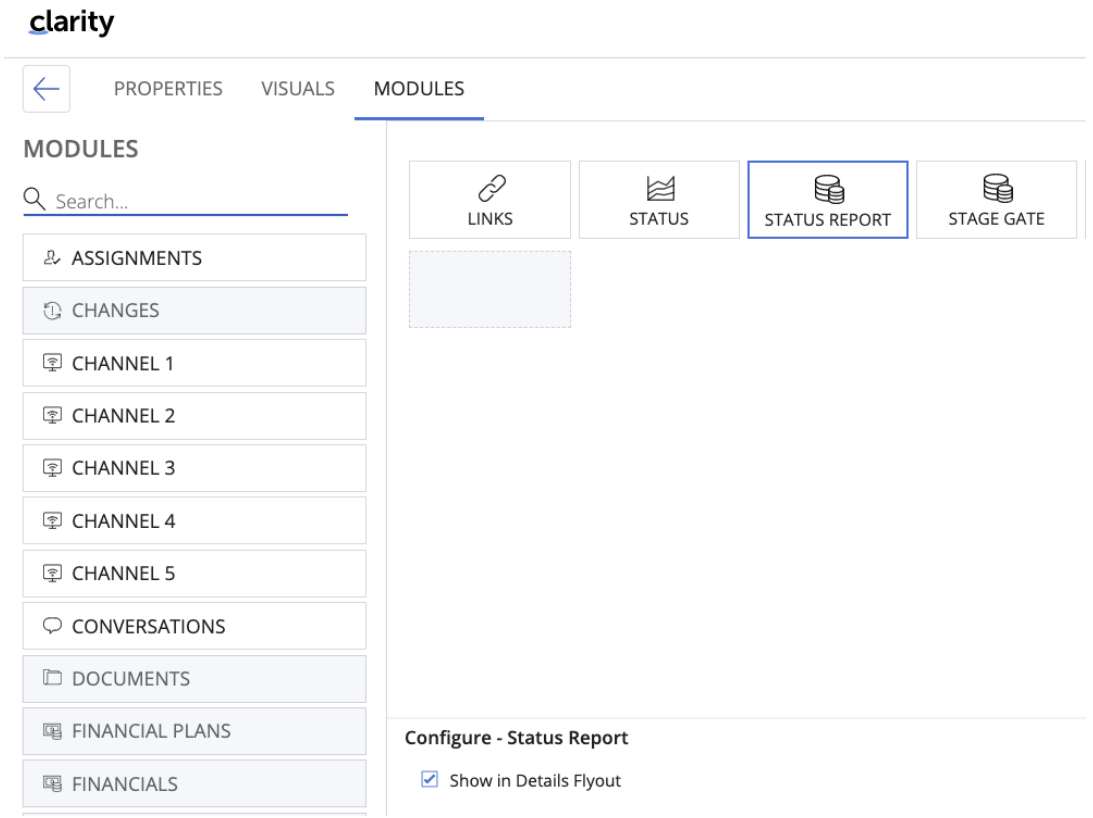
Roadmap Syncs

- Added syncing of the following custom attributes:
  - Parameterized Lookups
  - Money
  - Large String
- (Last PI we did)
    - URL
    - Percent
    - Dynamic Lookups

Usable Support for customer requested attributes

SubObject Grids on Project List – Blueprint Configuration

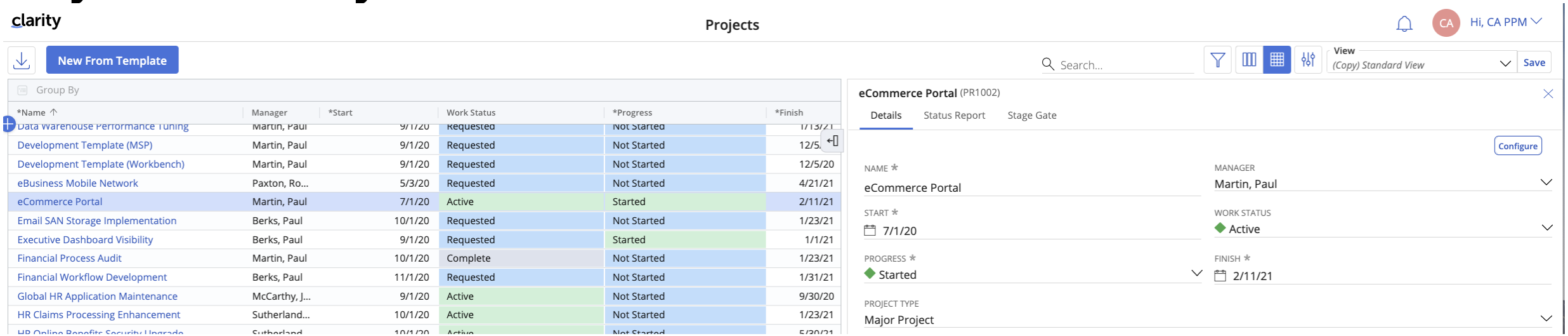
- Blueprint option to show grid in the Flyout
- Multiple subobject grids supported



Usable

Eliminate clicks to data
You determine which grids to display in the Flyout

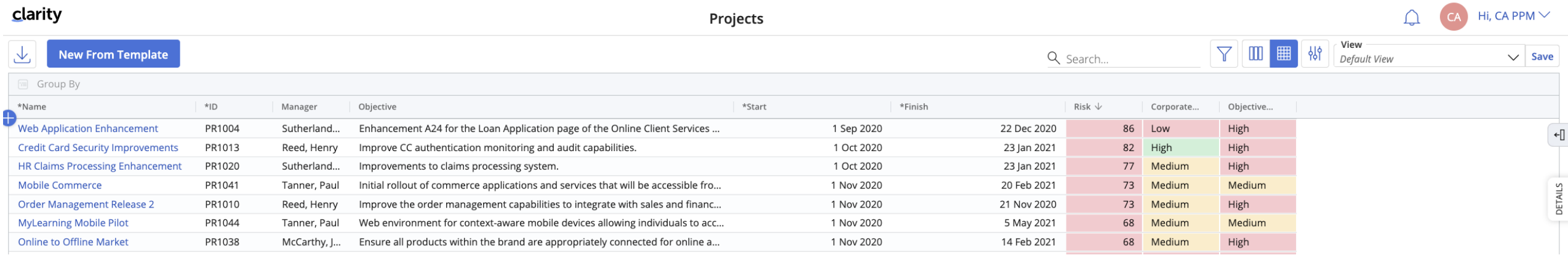
Flyout Usability – Persisted Views



- Persist the Open / Closed State of the Flyout for each user
- Remains in place on Logout/Login
- Available in:
  - Projects, Ideas, CIT, Custom Objects and SubObjects
  - Risks, Issues, Change
  - Tasks, Assignments, Staff

Usable Set your flyout the way you want it and it stays in place

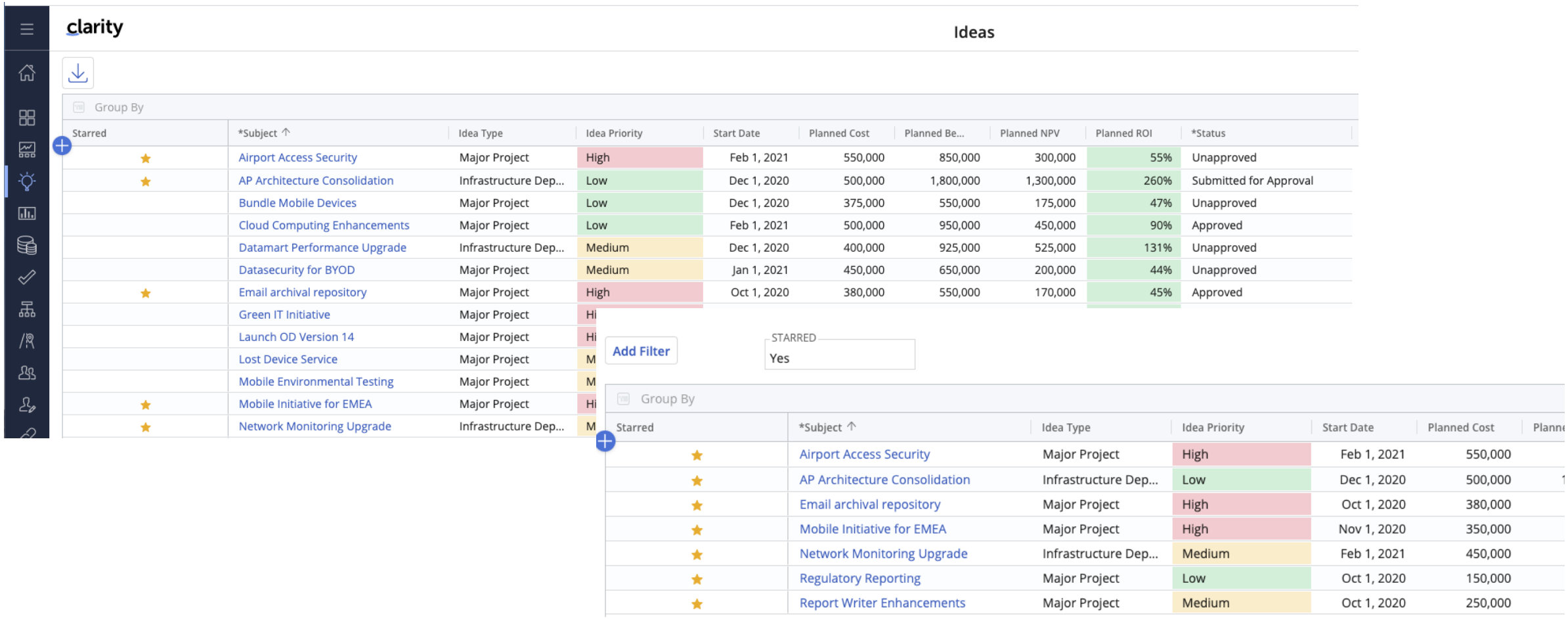
Saved View Improvement –Simplify Saving Views



- Change your Grid columns and the Save button is highlighted
- Quick Save to overwrite your existing view (eliminate “Save As” clicks)
- Prompt before leaving a view so you don’t inadvertently lose your view

Usable Making it easy to keep the grid the way you want it

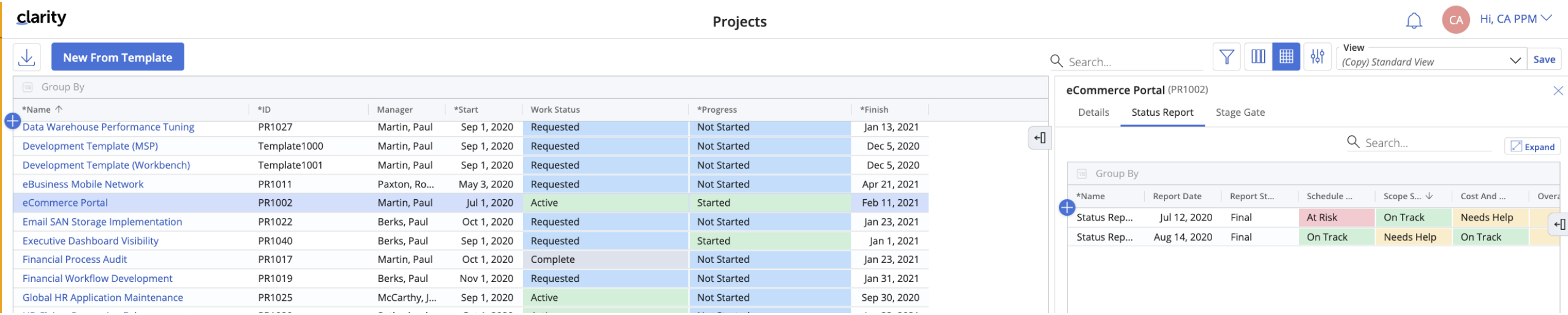
Favorites – Quickly get to your list

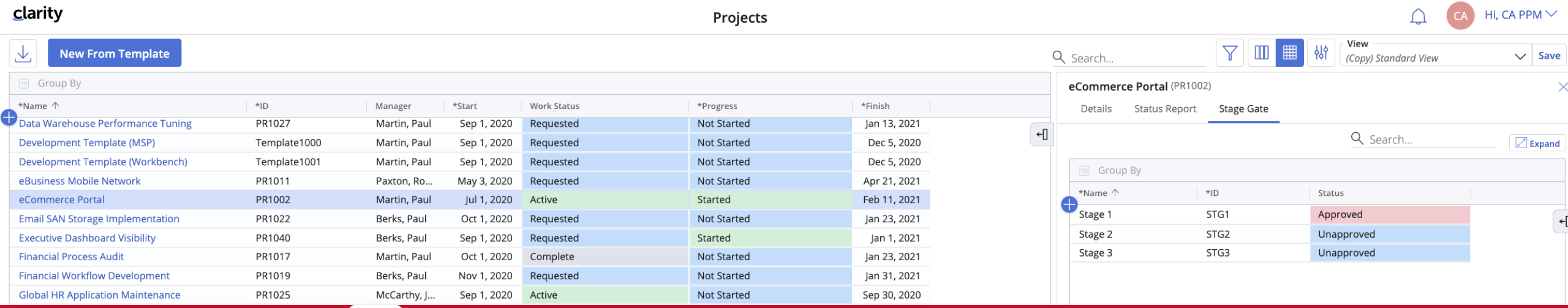


Usable

Star your favorites

Grids on List Flyout – Multiple Grids



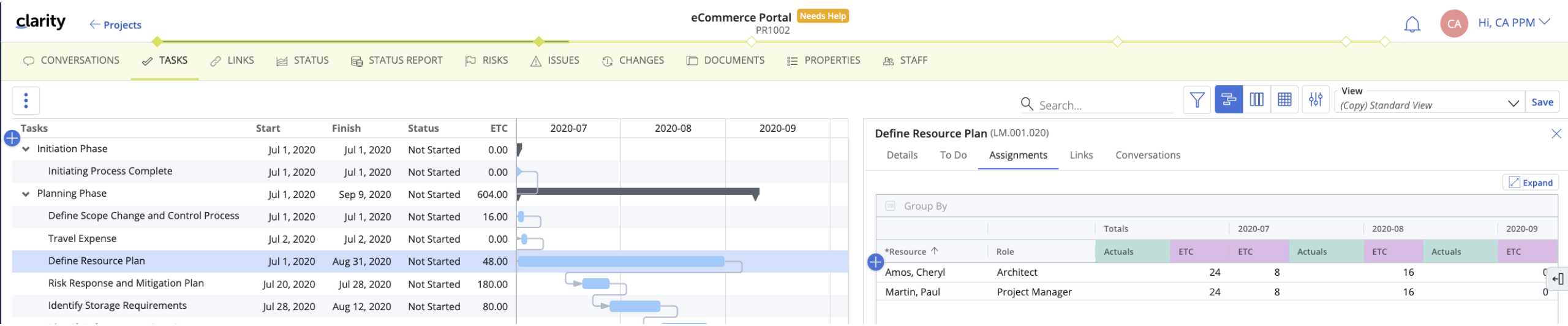


Usable

Eliminate clicks to data

You determine which grids to display in the Flyout

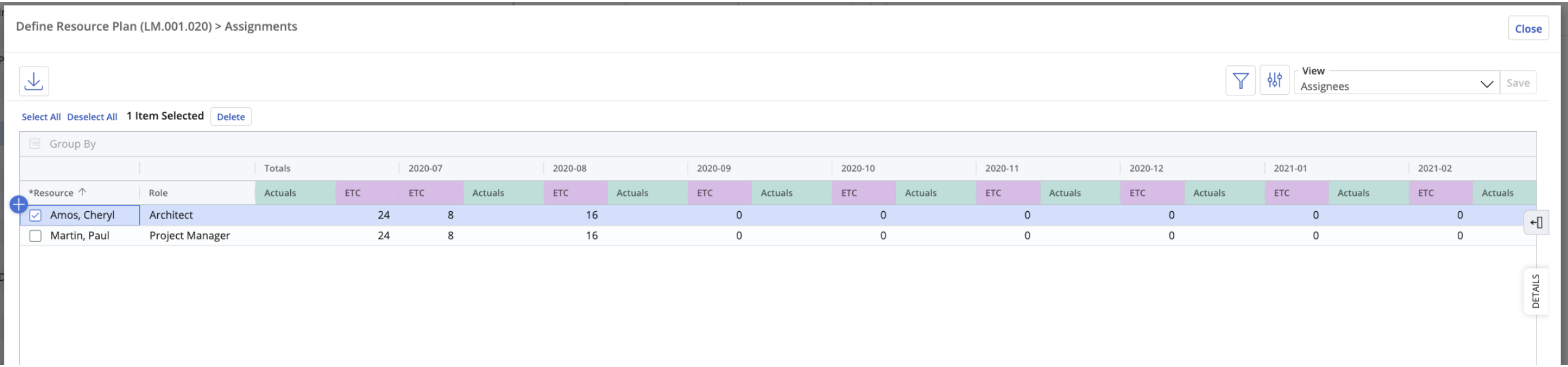
Flyout to Assignment Grid on Investments



- Click on Assignments
- Add Resources, update time phased ETC
- As you scroll through tasks on the left, you see assignments on the right

Powerful Estimating time varying data with one click

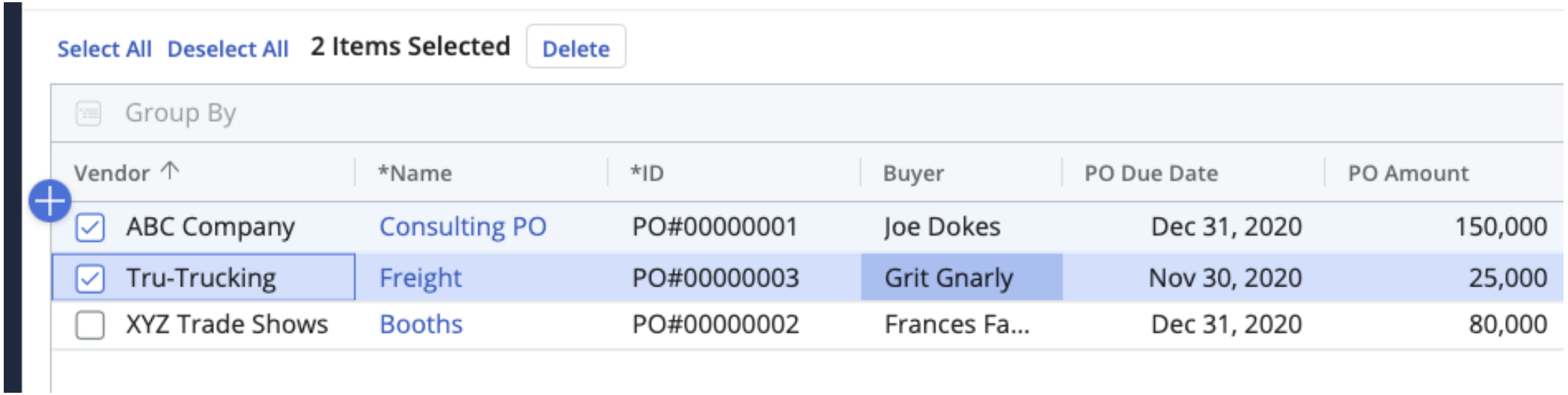
Flyout Grid on Assignments - Expand



- When expanded, you have access to Saved Views, Filters, Mass Delete, etc.
- Note: per period column colors

Powerful Estimating time varying data with one click

Mass Actions – CIT, Custom, Projects



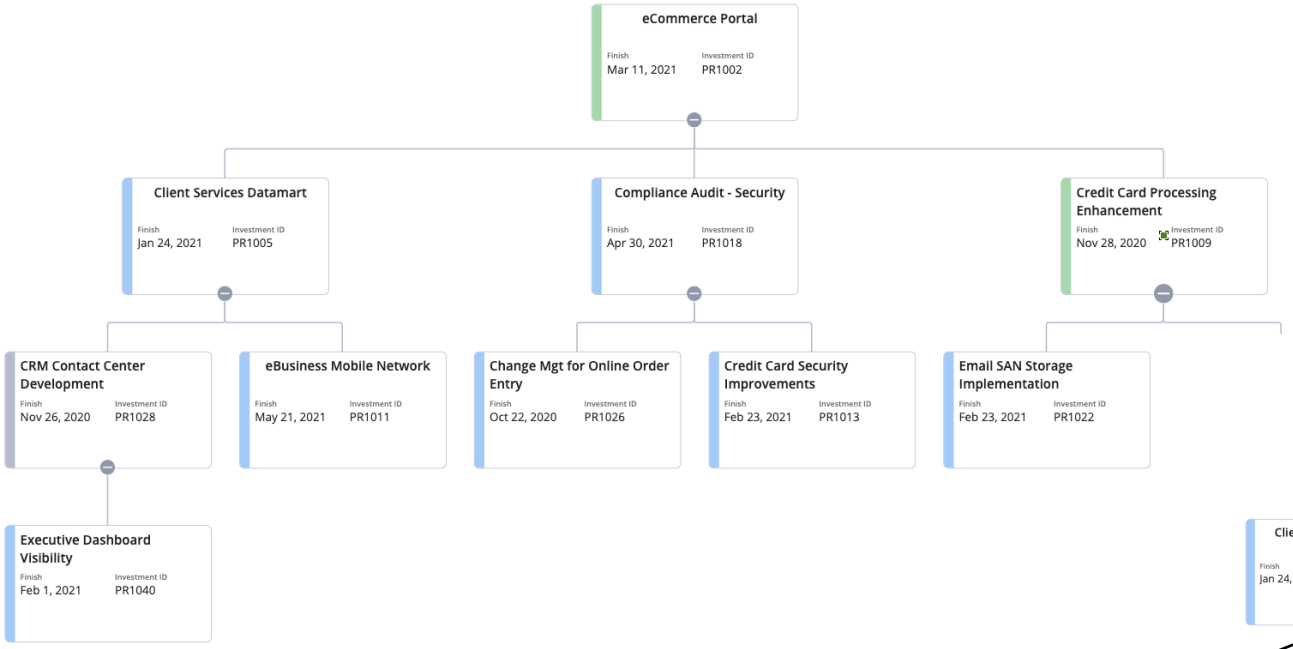
- Select multiple items and Delete.
- Available in:
  - Custom Objects and SubObjects
  - Risks, Issues, Change
  - Tasks, Assignments, Staff

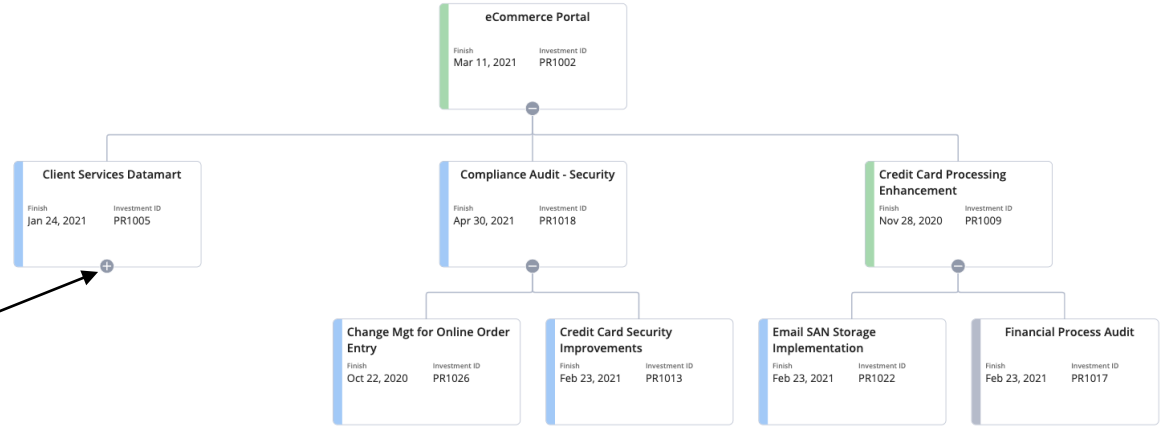
- Investments will soon have “Mark for Deletion”
- Not (yet) Available in:
  - Financial Plans

Usable

Mass Actions come to the Modern UX

Mass Actions – CIT, Custom, Projects





- Expand and collapse nodes in the hierarchy

Usable

Mass Actions come to the Modern UX

Lookup Usability Improvements – Simplify Selections

- Selected Lookup is always at the top of the list
- Eliminate trying to find the value to clear it
- Column expands to fit large Lookups
- OBS is displayed with full value separated by “/”
- Roadmap Investment lookup is alphabetized

Usable Making it easy to find and change values

Questions?

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CLARITY'S FUTURE
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YOU'LL HAVE TO
WEAR SHADES.

Thank You

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