



# Clarity roadmap

October 2020



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# Getting More Value from **Clarity**

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

# 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

# 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

# Planned

## 15.9 – November 2020



# Display Inactive – Inactive Projects Ideas, CIT

The screenshot shows the Clarity project management interface. At the top, the 'clarity' logo is on the left, and a navigation bar contains icons for CONVERSATIONS, TASKS, LINKS, STATUS, FINANCIAL PLANS, RISKS, ISSUES, CHANGES, DOCUMENTS, DETAILS, STAFF, and AAA. The 'DETAILS' tab is selected. Below the navigation bar, a project summary section is visible. It includes a 'PROJECT NAME' field with the value 'BYOD Management' and a 'PROJECT TYPE' field with the value 'Major Project'. To the right of the project name, there is a yellow 'Inactive' status label with a warning icon, and a green 'On Track' status label. Below the project name, there is a 'WORK STATUS' field with a dropdown arrow and the value 'On Hold'. An arrow points from the 'Inactive' label to the text below.

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

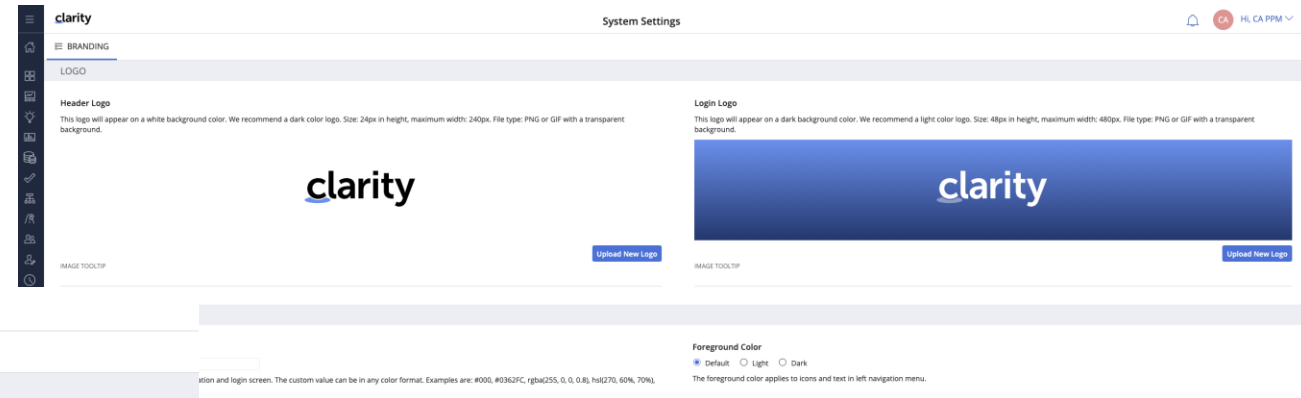
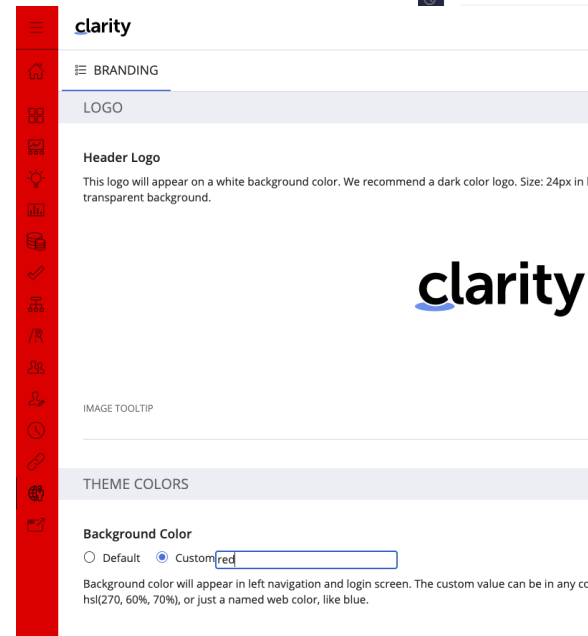
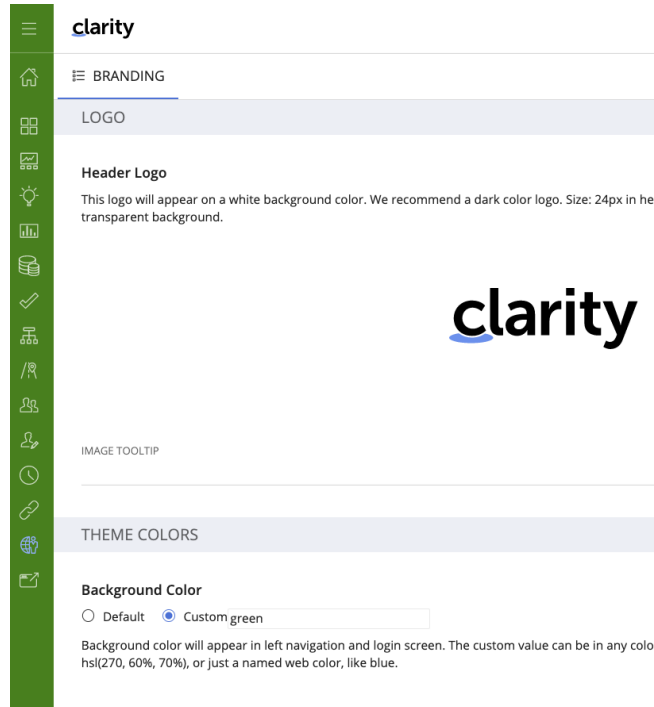
This is the first introduction of Business Rules

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

External☐

Allow Direct Login when SSO is Enabled☒

StatusActive ▾

Time Zone(GMT) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London

LocaleEnglish(United Kingdom) ▾

LanguageEnglish ▾

Home PageSystem Default

Reset Home Page

Set to Current Timesheet

Resource ManagerAdministrator, CA PPM

Company

Group By			
*Name ↑	*ID	Manager	*Start
Application Change Template	csk.appCh...	Martin, Paul	1 Sep 2020
Application COTS Template	csk.appCO...	Martin, Paul	1 Sep 2020
Automated Security Enhancements	PR1016	Berks, Paul	1 Oct 2020
BYOD Management	PR1037	Tanner, Paul	1 Dec 2020
Change Mgt for Internal Portal	PR1024	McCarthy, J...	4 Nov 2020
Change Mgt for Online Order Entry	PR1026	McCarthy, J...	4 Sep 2020
Client Services Datamart	PR1005	Martin, Paul	1 Sep 2020

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

## SETTINGS

PROFILE

GENERAL

STAFFING

DATE DISPLAY


☐ Sep 15, 2020 ☒ 9/15/20

UNIT OF MEASURE

☒ FTE ☐ Hours ☐ Days

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

10.10.20 

12-1-2020 

Simple



Support for Localization

☰

Home

Grid

Dashboard

Lightbulb

Bar Chart

Stack of Coins

Checkmark

Network

Location Pin

People

Handshake

Clock

Link

Help

clarity

Attributes

←

↓

Add Filter

OBJECT  
Purchase Order

Group By

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	✓



## 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

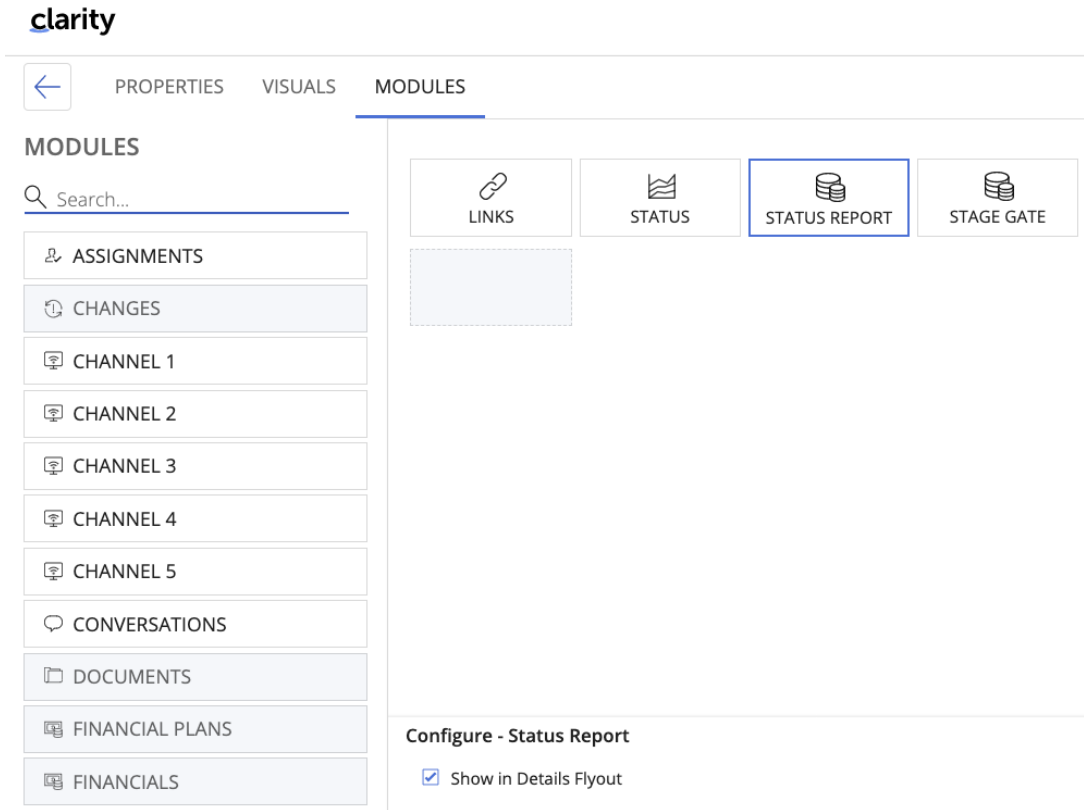
**Usable**



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

clarity

Projects

CA Hi, CA PPM

Group By					
*Name ↑	Manager	*Start	Work Status	*Progress	*Finish
Data warehouse Performance Tuning	Martin, Paul	9/1/20	Requested	Not Started	1/13/21
Development Template (MSP)	Martin, Paul	9/1/20	Requested	Not Started	12/5/21
Development Template (Workbench)	Martin, Paul	9/1/20	Requested	Not Started	12/5/20
eBusiness Mobile Network	Paxton, Ro...	5/3/20	Requested	Not Started	4/21/21
eCommerce Portal	Martin, Paul	7/1/20	Active	Started	2/11/21
Email SAN Storage Implementation	Berks, Paul	10/1/20	Requested	Not Started	1/23/21
Executive Dashboard Visibility	Berks, Paul	9/1/20	Requested	Started	1/1/21
Financial Process Audit	Martin, Paul	10/1/20	Complete	Not Started	1/23/21
Financial Workflow Development	Berks, Paul	11/1/20	Requested	Not Started	1/31/21
Global HR Application Maintenance	McCarthy, J...	9/1/20	Active	Not Started	9/30/20
HR Claims Processing Enhancement	Sutherland...	10/1/20	Active	Not Started	1/23/21
HR Online Benefits Security Upgrade	Sutherland...	10/1/20	Active	Not Started	5/20/21

eCommerce Portal (PR1002)

Details Status Report Stage Gate

NAME \*

eCommerce Portal

MANAGER

Martin, Paul

START \*

7/1/20

WORK STATUS

Active

PROGRESS \*

Started

FINISH \*

2/11/21

PROJECT TYPE

Major Project

- 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

clarity

Projects

New From Template

Search...

View

Default View

Save

Group By

*Name	*ID	Manager	Objective	*Start	*Finish	Risk ↓	Corporate...	Objective...
Web Application Enhancement	PR1004	Sutherland...	Enhancement A24 for the Loan Application page of the Online Client Services ...	1 Sep 2020	22 Dec 2020	86	Low	High
Credit Card Security Improvements	PR1013	Reed, Henry	Improve CC authentication monitoring and audit capabilities.	1 Oct 2020	23 Jan 2021	82	High	High
HR Claims Processing Enhancement	PR1020	Sutherland...	Improvements to claims processing system.	1 Oct 2020	23 Jan 2021	77	Medium	High
Mobile Commerce	PR1041	Tanner, Paul	Initial rollout of commerce applications and services that will be accessible fro...	1 Nov 2020	20 Feb 2021	73	Medium	Medium
Order Management Release 2	PR1010	Reed, Henry	Improve the order management capabilities to integrate with sales and financ...	1 Nov 2020	21 Nov 2020	73	Medium	High
MyLearning Mobile Pilot	PR1044	Tanner, Paul	Web environment for context-aware mobile devices allowing individuals to acc...	1 Nov 2020	5 May 2021	68	Medium	Medium
Online to Offline Market	PR1038	McCarthy, J...	Ensure all products within the brand are appropriately connected for online a...	1 Nov 2020	14 Feb 2021	68	Medium	High

- 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

clarity

Ideas

Group By

Starred	*Subject ↑	Idea Type	Idea Priority	Start Date	Planned Cost	Planned Be...	Planned NPV	Planned ROI	*Status
★	Airport Access Security	Major Project	High	Feb 1, 2021	550,000	850,000	300,000	55%	Unapproved
★	AP Architecture Consolidation	Infrastructure Dep...	Low	Dec 1, 2020	500,000	1,800,000	1,300,000	260%	Submitted for Approval
	Bundle Mobile Devices	Major Project	Low	Dec 1, 2020	375,000	550,000	175,000	47%	Unapproved
	Cloud Computing Enhancements	Major Project	Low	Feb 1, 2021	500,000	950,000	450,000	90%	Approved
	Datamart Performance Upgrade	Infrastructure Dep...	Medium	Dec 1, 2020	400,000	925,000	525,000	131%	Unapproved
	Datasecurity for BYOD	Major Project	Medium	Jan 1, 2021	450,000	650,000	200,000	44%	Unapproved
★	Email archival repository	Major Project	High	Oct 1, 2020	380,000	550,000	170,000	45%	Approved
	Green IT Initiative	Major Project	Hi						
	Launch OD Version 14	Major Project	Hi						
	Lost Device Service	Major Project	M						
	Mobile Environmental Testing	Major Project	M						
★	Mobile Initiative for EMEA	Major Project	Hi						
★	Network Monitoring Upgrade	Infrastructure Dep...	M						

Add Filter

STARRED  
Yes

Starred	*Subject ↑	Idea Type	Idea Priority	Start D
★	Airport Access Security	Major Project	High	Feb
★	AP Architecture Consolidation	Infrastructure Dep...	Low	Dec
★	Email archival repository	Major Project	High	Oc
★	Mobile Initiative for EMEA	Major Project	High	Nov
★	Network Monitoring Upgrade	Infrastructure Dep...	Medium	Feb
★	Regulatory Reporting	Major Project	Low	Oc
★	Report Writer Enhancements	Major Project	Medium	Oc



## Star your favorites



# Grids on List Flyout – Multiple Grids

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Projects

Download

New From Template

Group By

*Name ↑	*ID	Manager	*Start	Work Status	*Progress	*Finish
Data Warehouse Performance Tuning	PR1027	Martin, Paul	Sep 1, 2020	Requested	Not Started	Jan 13, 2021
Development Template (MSP)	Template1000	Martin, Paul	Sep 1, 2020	Requested	Not Started	Dec 5, 2020
Development Template (Workbench)	Template1001	Martin, Paul	Sep 1, 2020	Requested	Not Started	Dec 5, 2020
eBusiness Mobile Network	PR1011	Paxton, Ro...	May 3, 2020	Requested	Not Started	Apr 21, 2021
eCommerce Portal	PR1002	Martin, Paul	Jul 1, 2020	Active	Started	Feb 11, 2021
Email SAN Storage Implementation	PR1022	Berks, Paul	Oct 1, 2020	Requested	Not Started	Jan 23, 2021
Executive Dashboard Visibility	PR1040	Berks, Paul	Sep 1, 2020	Requested	Started	Jan 1, 2021
Financial Process Audit	PR1017	Martin, Paul	Oct 1, 2020	Complete	Not Started	Jan 23, 2021
Financial Workflow Development	PR1019	Berks, Paul	Nov 1, 2020	Requested	Not Started	Jan 31, 2021
Global HR Application Maintenance	PR1025	McCarthy, J...	Sep 1, 2020	Active	Not Started	Sep 30, 2020

Search...

Filter

Grid

Table

View

View

(Copy) Standard View

Save

eCommerce Portal (PR1002)

DetailsStatus ReportStage Gate

Search...

Expand

Group By

*Name	Report Date	Report St...	Schedule ...	Scope S... ↓	Cost And ...	Over...
Status Rep...	Jul 12, 2020	Final	At Risk	On Track	Needs Help	
Status Rep...	Aug 14, 2020	Final	On Track	Needs Help	On Track	

clarity

Projects

Download

New From Template

Group By

*Name ↑	*ID	Manager	*Start	Work Status	*Progress	*Finish
Data Warehouse Performance Tuning	PR1027	Martin, Paul	Sep 1, 2020	Requested	Not Started	Jan 13, 2021
Development Template (MSP)	Template1000	Martin, Paul	Sep 1, 2020	Requested	Not Started	Dec 5, 2020
Development Template (Workbench)	Template1001	Martin, Paul	Sep 1, 2020	Requested	Not Started	Dec 5, 2020
eBusiness Mobile Network	PR1011	Paxton, Ro...	May 3, 2020	Requested	Not Started	Apr 21, 2021
eCommerce Portal	PR1002	Martin, Paul	Jul 1, 2020	Active	Started	Feb 11, 2021
Email SAN Storage Implementation	PR1022	Berks, Paul	Oct 1, 2020	Requested	Not Started	Jan 23, 2021
Executive Dashboard Visibility	PR1040	Berks, Paul	Sep 1, 2020	Requested	Started	Jan 1, 2021
Financial Process Audit	PR1017	Martin, Paul	Oct 1, 2020	Complete	Not Started	Jan 23, 2021
Financial Workflow Development	PR1019	Berks, Paul	Nov 1, 2020	Requested	Not Started	Jan 31, 2021
Global HR Application Maintenance	PR1025	McCarthy, J...	Sep 1, 2020	Active	Not Started	Sep 30, 2020

Search...

Filter

Grid

Table

View

View

(Copy) Standard View

Save

eCommerce Portal (PR1002)

DetailsStatus ReportStage Gate

Search...

Expand

Group By

*Name ↑	*ID	Status
Stage 1	STG1	Approved
Stage 2	STG2	Unapproved
Stage 3	STG3	Unapproved

Usable

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

# Flyout to Assignment Grid on Investments

clarity

← Projects

eCommerce Portal

PR1002

Needs Help

CONVERSATIONS

TASKS

LINKS

STATUS

STATUS REPORT

RISKS

ISSUES

CHANGES

DOCUMENTS

PROPERTIES

STAFF

+

Tasks

Start

Finish

Status

ETC

2020-07

2020-08

2020-09

Initiation Phase

Jul 1, 2020

Jul 1, 2020

Not Started

0.00

Initiating Process Complete

Jul 1, 2020

Jul 1, 2020

Not Started

0.00

Planning Phase

Jul 1, 2020

Sep 9, 2020

Not Started

604.00

Define Scope Change and Control Process

Jul 1, 2020

Jul 1, 2020

Not Started

16.00

Travel Expense

Jul 2, 2020

Jul 2, 2020

Not Started

0.00

Define Resource Plan

Jul 1, 2020

Aug 31, 2020

Not Started

48.00

Risk Response and Mitigation Plan

Jul 20, 2020

Jul 28, 2020

Not Started

180.00

Identify Storage Requirements

Jul 28, 2020

Aug 12, 2020

Not Started

80.00

Search...

View

(Copy) Standard View

Save

Define Resource Plan (LM.001.020)

Details

To Do

Assignments

Links

Conversations

Group By

Totals

2020-07

2020-08

2020-09

\*Resource ↑

Role

Actuals

ETC

ETC

Actuals

ETC

Actuals

ETC

Amos, Cheryl

Architect

24

8

16

0

0

Martin, Paul

Project Manager

24

8

16

0

0

- 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

Define Resource Plan (LM.001.020) > Assignments Close

Download

Filter

Sort

View Assignees

Save

Select All Deselect All 1 Item Selected Delete

Group By																			
		Totals		2020-07		2020-08		2020-09		2020-10		2020-11		2020-12		2021-01		2021-02	
*Resource ↑	Role	Actuals	ETC	ETC	Actuals	ETC	Actuals	ETC	Actuals	ETC	Actuals	ETC	Actuals	ETC	Actuals	ETC	Actuals	ETC	Actuals
<input checked="" type="checkbox"/> Amos, Cheryl	Architect		24	8		16		0		0		0		0		0		0	
<input type="checkbox"/> Martin, Paul	Project Manager		24	8		16		0		0		0		0		0		0	

DETAILS

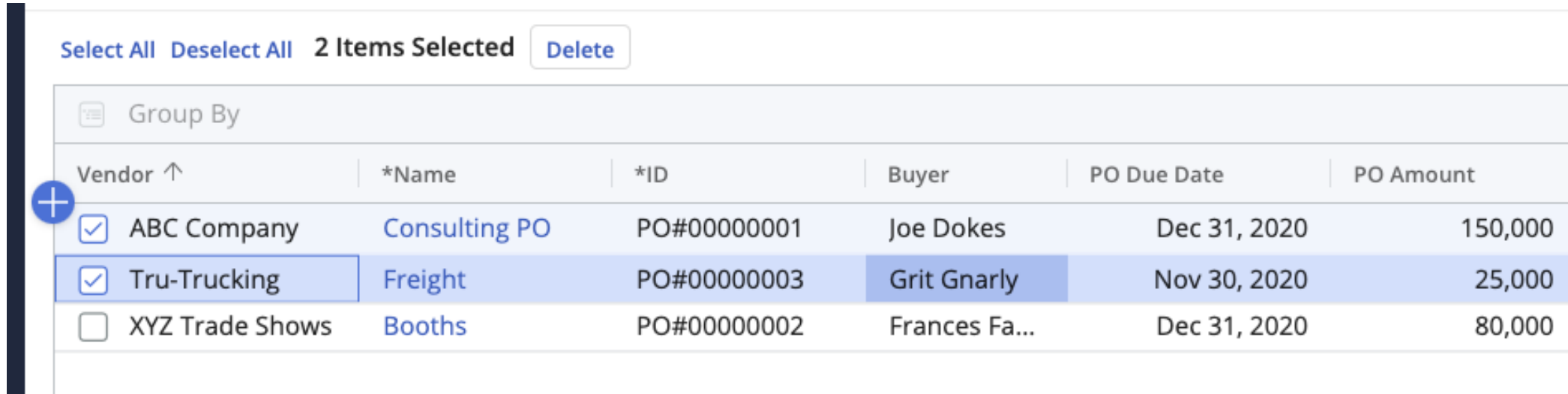
- When expanded, you have access to Saved Views, Filters, Mass Delete, etc.
- Note: per period column colors

Powerful



Estimating time varying data with one click

# Mass Actions – CIT, Custom, Projects



The screenshot shows a software interface with a table. At the top, there are links for 'Select All', 'Deselect All', and a status '2 Items Selected' next to a 'Delete' button. Below this is a 'Group By' section. The table has columns: 'Vendor' (with an upward arrow), '\*Name', '\*ID', 'Buyer', 'PO Due Date', and 'PO Amount'. Three rows are visible: 'ABC Company' (Consulting PO, PO#00000001, Joe Dokes, Dec 31, 2020, 150,000), 'Tru-Trucking' (Freight, PO#00000003, Grit Gnarly, Nov 30, 2020, 25,000), and 'XYZ Trade Shows' (Booths, PO#00000002, Frances Fa..., Dec 31, 2020, 80,000). The first two rows have checkboxes checked, and the third has an unchecked checkbox. A blue plus icon is visible on the left side of the table.

Vendor ↑	*Name	*ID	Buyer	PO Due Date	PO Amount
<input checked="" type="checkbox"/> ABC Company	Consulting PO	PO#00000001	Joe Dokes	Dec 31, 2020	150,000
<input checked="" type="checkbox"/> Tru-Trucking	Freight	PO#00000003	Grit Gnarly	Nov 30, 2020	25,000
<input type="checkbox"/> XYZ Trade Shows	Booths	PO#00000002	Frances Fa...	Dec 31, 2020	80,000

- 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



Usable



Mass Actions come to the Modern UX

# Lookup Usability Improvements – Simplify Selections

*Name ↑	Manager	*Start	Work Status
Application Change Template	Martin, Paul	9/1/20	Search... ✓
Application COTS Template	Martin, Paul	9/1/20	-- None --
Automated Security Enhancements	Berks, Paul	10/1/20	Requested
BYOD Management	Tanner, Paul	12/1/20	Active
Change Mgt for Internal Portal	McCarthy, J...	11/4/20	On Hold
Change Mgt for Online Order Entry	McCarthy, J...	9/4/20	Cancelled
Client Services Datamart	Martin, Paul	9/1/20	Complete
Compliance Audit - Security	Sutherland...	11/1/20	

- 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?



**CLARITY'S FUTURE  
IS SO BRIGHT,  
YOU'LL HAVE TO  
WEAR SHADES.**







# Thank You





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