



Clarity Community Webcast

Clarity Connections

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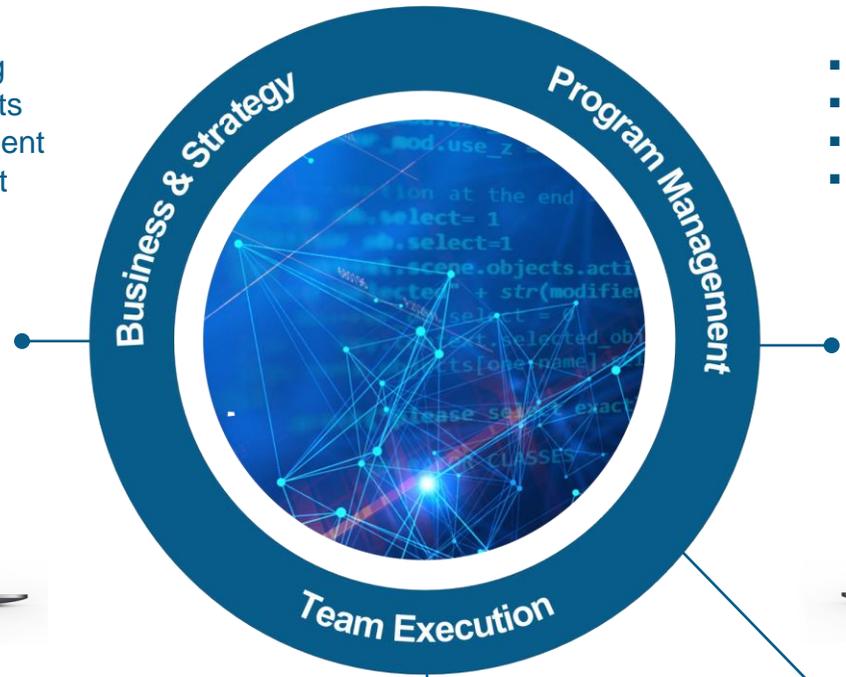
April 14, 2022



Broadcom ValueOps Solution

- Investment Strategy
- Innovation Roadmaps
- Demand Management
- Funding Decisions
- Financials Reporting
- Business Agreements
- Resource Management
- Project Management

- PI Planning & Tracking
- Dependency & Risk Mgt
- Capacity Planning
- Execution Roadmaps
- Quality Management
- Release Tracking
- Efficiency Metrics
- Enterprise Visibility



Session Agenda

- What is 'Clarity Connections'
- Clarity Connections 'In Action'
- Integration Administration
 - Creating the Integration Object
 - Creating an Integration Mapping
 - Executing the Integration
- Use Case Examples
 - Mapping Additional Fields
 - Setting up the Integration for Custom Attributes
- Visibility to Integration Metrics and Reporting
- Other Administration Topics
- Q&A



Clarity Connections Defined



Clarity Connections: Facilitating Adaptive Strategy Planning and Execution Delivery



Key Persona(s):
Business Execs,
Product Managers



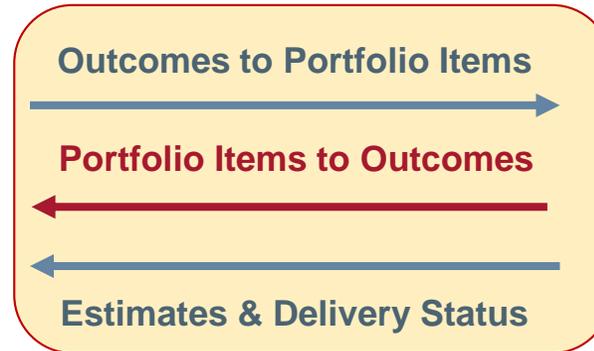
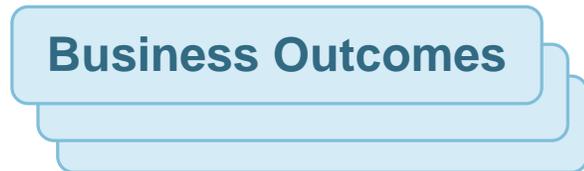
Key Persona(s):
Product Owners,
R&D/Engineering

Customer Engagement
→



↕
Business Prioritization to Optimize Delivered Value

↕
Agile Execution



Area of focus for Clarity and Rally Integration

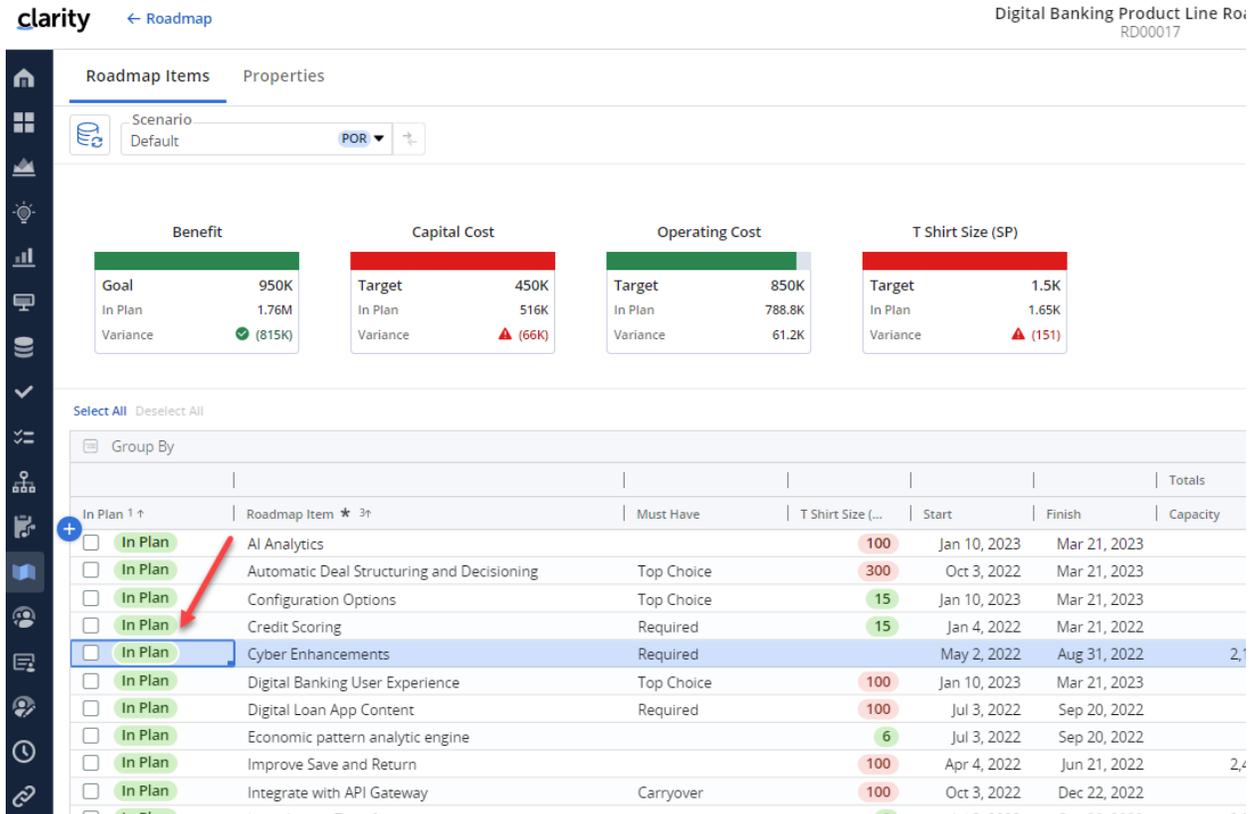
Clarity Connections

- **Clarity Connections** is the in-product integration that facilitates a connection between Clarity and Rally
- The integration can be defined between a Clarity CIT (Custom Investment Type), Project, or Idea and a Rally Portfolio Item
- The majority of the configuration of Clarity Connections is done within the Clarity Administration area of the Modern User Experience

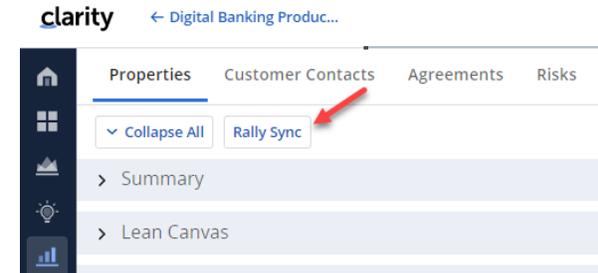
Clarity Connections 'In Action'



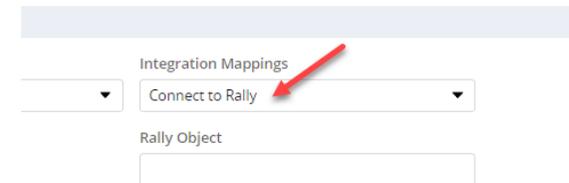
Clarity Connections 'In Action'



1. Portfolio Epics are prioritized and selected for execution...



3. The 'Synchronize Mapped Information' job is run, using a scheduled job, manually executed job, or Action (via a process).



2. ...on the Portfolio Epic, the 'Integration Mappings' attribute is set to the desired integration. This setting indicates that this Portfolio Epic will be integrated with Rally. **note that this can be a manual step or automated via a Roadmap process.

Clarity Connections 'In Action'

A new Epic has been created in Rally.

| Rank | ID | Name | Release | State | Percent Done By Story Plan Estimate | Percent Done By Story Count | Plan Estimate | Un-Estimated Leaf Story Count | Project | Owner | |
|--------------------------|-------|--|---------|------------|-------------------------------------|-----------------------------|---------------|-------------------------------|------------------------|--------|--|
| Totals | | | | | | | | | 11 | | |
| <input type="checkbox"/> | > E1 | NexGen Fraud Alert System | -- | Build | 44% 119/... | 45% 32/7... | -- | 7 | Digital Banking | Rachel | |
| <input type="checkbox"/> | > E2 | Build read-write API for handling loan ... | -- | Build | 0% 0/0 poi... | 0% 0/0 sto... | -- | 0 | Platform | Aaron | |
| <input type="checkbox"/> | > E3 | Loan Calculator Tool | -- | Build | 35% 34/9... | 32% 8/25 ... | -- | 1 | Digital Banking | Rachel | |
| <input type="checkbox"/> | > E4 | Digital Banking User Experience | -- | Build | 19% 24/1... | 23% 7/31 ... | -- | 2 | Digital Banking | Rachel | |
| <input type="checkbox"/> | > E5 | Commercial Credit Analysis | -- | Build | 13% 3/23 ... | 20% 1/5 st... | -- | 0 | Digital Banking | Rachel | |
| <input type="checkbox"/> | E6 | Integrate with API Gateway | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | 0 | Platform | Aaron | |
| <input type="checkbox"/> | E7 | Homepage | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | 0 | Digital Banking | Rachel | |
| <input type="checkbox"/> | E8 | Credit Scoring | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | 0 | Digital Banking | Rachel | |
| <input type="checkbox"/> | > E9 | Loan Assist eTransfer | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | 0 | Digital Banking | Rachel | |
| <input type="checkbox"/> | > E10 | Consumer Portal | -- | Busin... | 0% 0/4 poi... | 0% 0/3 sto... | -- | 1 | Platform | Aaron | |
| <input type="checkbox"/> | E11 | Credit Score Highlighting | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | 0 | Platform | Aaron | |
| <input type="checkbox"/> | E12 | Cyber Enhancements | -- | | 0% 0/0 poi... | 0% 0/0 sto... | -- | 0 | Business to Bank En... | | |

Settings

Department: Development

Work Status: Requested

Integration Mappings: Connect to Rally

Investment ID *: EPI00000043 Active

Rally Project: Business to Bank Engagement

Rally Object: 630719525257

If a Rally Project is specified in Clarity, the new Portfolio Epic will be created in that Project in Rally. If not specified, it will create it in the default Rally project of the service account that was setup for the integration. ****Note – your organization may want to control/automate these selections.**

Clarity Connections 'In Action'

Projects ... Business to Bank Engagement

Portfolio Items Portfolio Item: Portfolio Item Epic Saved Views: Select or Add Saved and Shared Views

Search Work Items + Add New Show Filters Show Fields Share

| Rank | ID | Name | Release | State | Percent Done By Story Plan Estimate | Percent Done By Story Count | Plan Estimate | Schedule State | Un-Deal Cou |
|--------|-------|--|---------|------------|-------------------------------------|-----------------------------|---------------|----------------|-------------|
| Totals | | | | | | | | | |
| | E1 | NexGen Fraud Alert System | -- | Build | 44% 119/... | 45% 32/7... | -- | | |
| | E2 | Build read-write API for handling loan ... | -- | Build | 0% 0/0 poi... | 0% 0/0 sto... | -- | | |
| | E3 | Loan Calculator Tool | -- | Build | 35% 34/9... | 32% 8/25 ... | -- | | |
| | E4 | Digital Banking User Experience | -- | Build | 19% 24/1... | 23% 7/31 ... | -- | | |
| | E5 | Commercial Credit Analysis | -- | Build | 13% 3/23 ... | 20% 1/5 st... | -- | | |
| | E6 | Integrate with API Gateway | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | | |
| | E7 | Homepage | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | | |
| | E8 | Credit Scoring | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | | |
| | E9 | Loan Assist eTransfer | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | | |
| | E10 | Consumer Portal | -- | Busin... | 0% 0/4 poi... | 0% 0/3 sto... | -- | | |
| | E11 | Credit Score Highlighting | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | | |
| | E12 | Cyber Enhancements | -- | | 38% 3/8 p... | 50% 1/2 st... | -- | | |
| | F51 | Feature 1 | | | 38% 3/8 p... | 50% 1/2 st... | | | |
| | US144 | User Story 1 | -- | -- | -- | -- | 3 | A | |
| | US145 | User Story 2 | -- | -- | -- | -- | 5 | D | |
| | F52 | Feature 2 | | | 0% 0/0 poi... | 0% 0/0 sto... | -- | | |

| | |
|------------------------------------|----------------------------------|
| Estimated Story Points | Estimated User Stories |
| <input type="text" value="8"/> | <input type="text" value="2"/> |
| Accepted Story Points | Accepted User Stories |
| <input type="text" value="3"/> | <input type="text" value="1"/> |
| % Done By Agile Plan Estimate | % Done by Story Count |
| <input type="text" value="37.5%"/> | <input type="text" value="50%"/> |

Information mapped via the Integration will be made visible in the Clarity Portfolio Epic

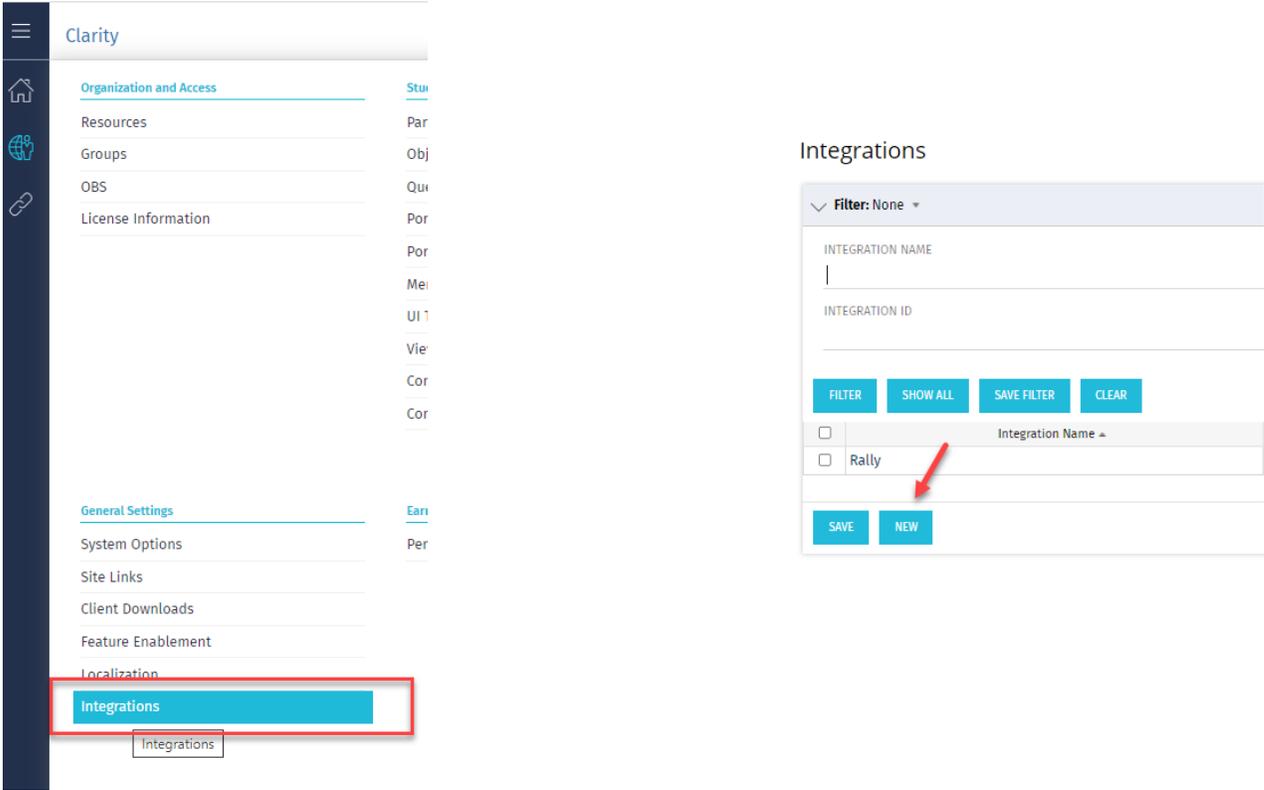
The Epic is decomposed into Features and User Stories. When User Stories are Accepted, their completion status will aggregate up into Epic level metrics, which will ultimately be visible in Clarity.

Integration Administration: Creating the Integration Object



Creating the Integration Object

- Configure the Clarity-Rally integration by creating one or more integration objects. The integration object is created from the Integrations page in Classic PPM (Administration/General Settings/Integrations).



Creating the Integration Object

Clarity

GENERAL AGILE CENTRAL INTEGRATION POLICY

Integration - Rally Properties - General

General

INTEGRATION NAME
Rally

INTEGRATION ID
ac_ppm

AREA
Agile
(Software application area of the vendor.)

VENDOR
Rally
(Software company that is being integrated to PPM.)

SUPPLIER
CA Technologies
(Name of company implementing the integration.)

Authentication

AUTHENTICATION TYPE
API Key

INTEGRATION API KEY

USER NAME

PASSWORD

INTEGRATION URL
https://rally1.rallydev.com

INTEGRATION INSTANCE
629997332087
(Instance the integration will connect to (e.g. Workspace id).)

REFERRER URL
https://rally1.rallydev.com

ACTIVE

PROXY SERVER

PROXY PORT
3128

PROXY USER NAME

PROXY USER PASSWORD

SAVE SAVE AND RETURN RETURN

Required Enter Once Unique

Provide a name and id for the integration instance.
Fill in the remaining required fields as outlined:

| <u>Field Name</u> | <u>Description</u> |
|----------------------|--|
| Areas | The software application or business area of the vendor (for example, Agile). |
| Vendor | The company name with which Clarity is integrating (for example, Rally). |
| Supplier | The company name that is implementing the integration (for example, Broadcom). |
| Integration URL | The URL for the integration instance (for example, the Rally instance URL). |
| Integration API Key | The key that is used to access and retrieve data from Rally |
| Integration Instance | The Rally workspace ID |

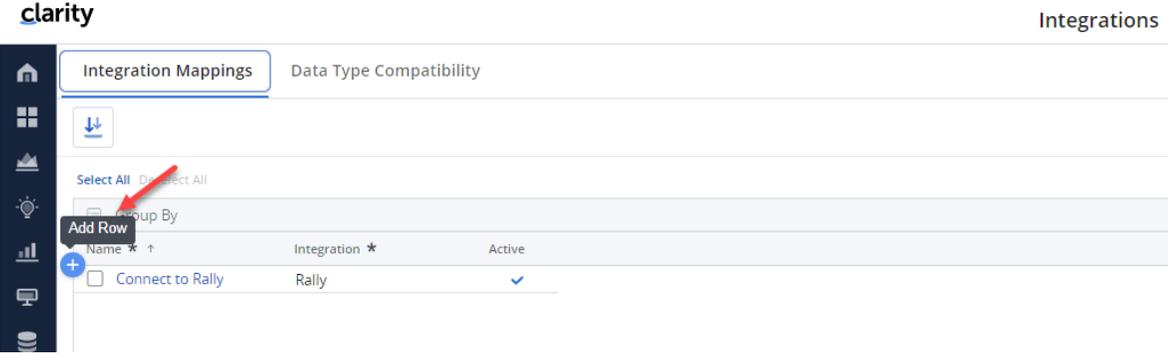
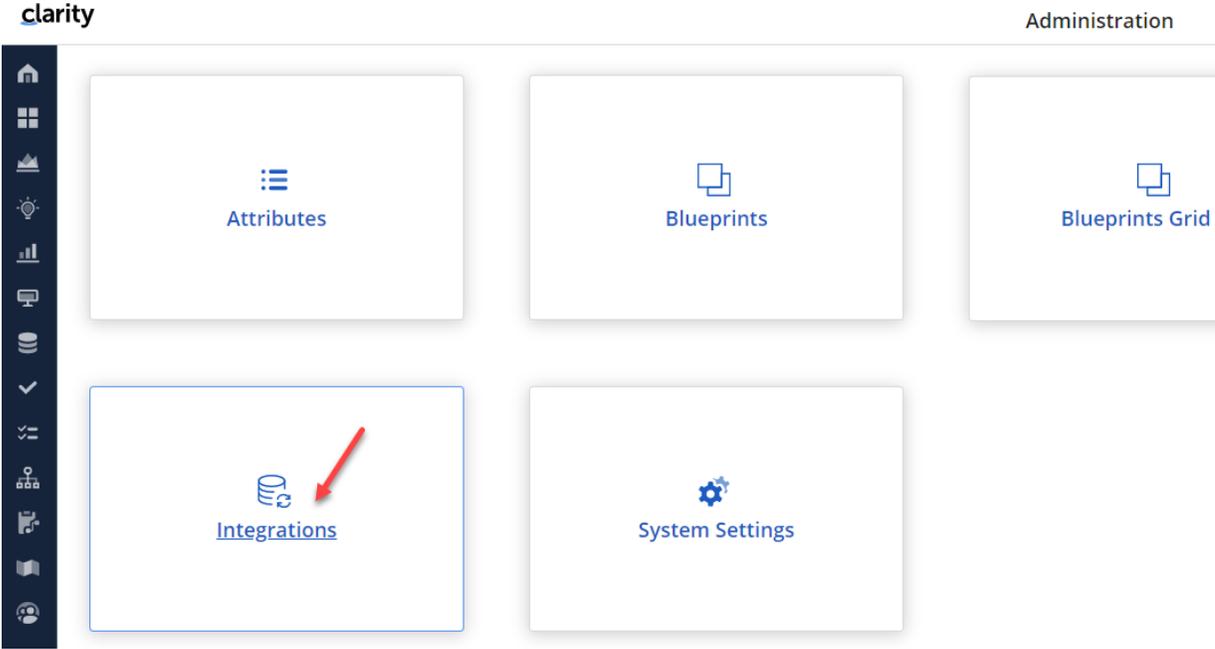
**note – the integration object creation uses the same configuration screen as the legacy Clarity to Rally connector, but only uses this first screen*

Integration Administration: Creating an Integration Mapping



Create an Integration Mapping

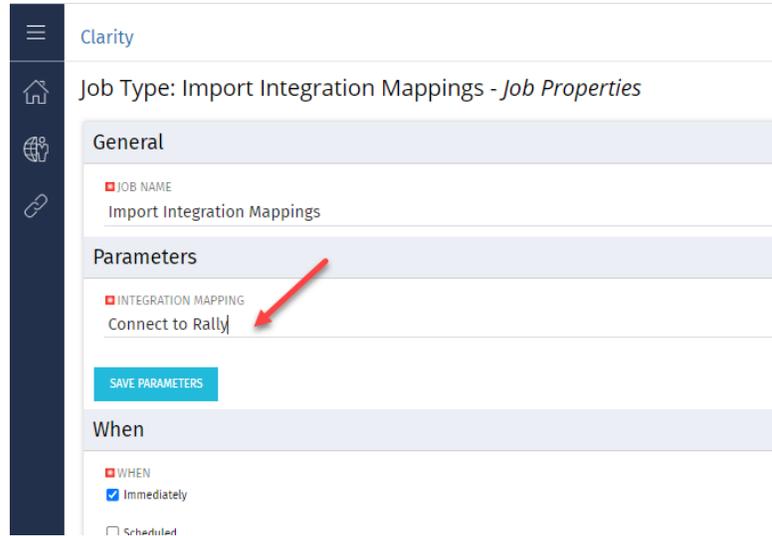
In the Modern UX Administration, navigate to Integrations



Add Row, provide a name for the integration mapping, and select the Integration Object that was just configured in the Classic UX – this will determine the connected Rally Workspace

Create an Integration Mapping

Navigate to Classic, and run the 'Import Integration Mappings' job. Make sure to select the Integration Mapping that you just created.

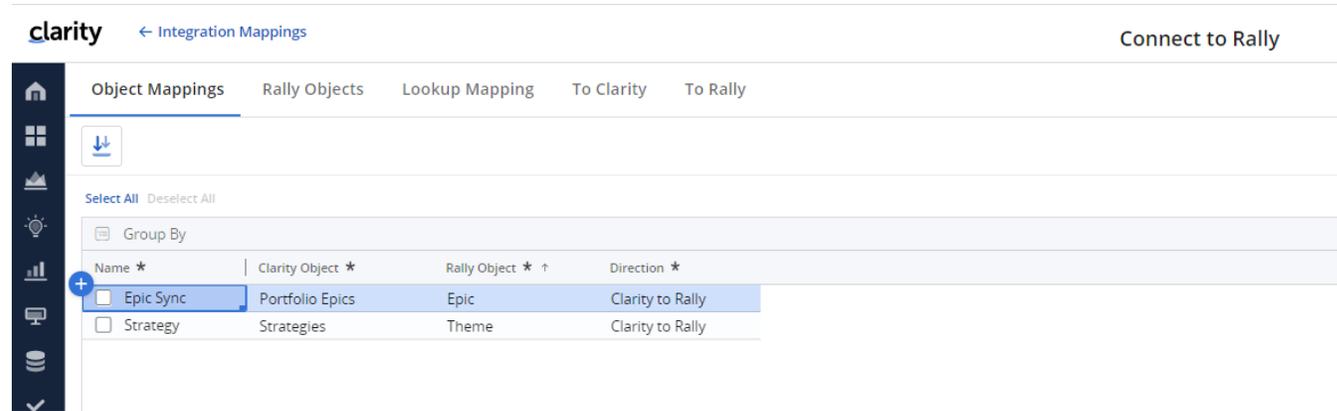


The screenshot shows the Clarity interface for configuring a job. The job name is 'Import Integration Mappings'. Under the 'Parameters' section, the 'INTEGRATION MAPPING' field is set to 'Connect to Rally', which is highlighted by a red arrow. Below this is a 'SAVE PARAMETERS' button. The 'When' section shows the 'WHEN' field with 'Immediately' selected and 'Scheduled' unselected.

The Import integration mapping job in Classic PPM enables Clarity to retrieve the portfolio item type objects and supported attributes from the configured Rally workspace, along with the Clarity object attributes, including custom attributes. It also fetches the Milestones, Investment Categories, State, and Project lookups from Rally. Once imported, the objects and fields are available in the Rally Objects tab in Clarity.

Create an Integration Mapping – Object Mapping

Navigate to Modern UX Administration, Integrations. You are now ready to create the Object and Field Mappings.



- Create one or more object mappings for this Integration Mapping
- In this example, Portfolio Epics in Clarity (a CIT) are sync'd with Epics in Rally
- In addition, the Strategy CIT in Clarity is sync'd with the Rally Theme
- Eligible objects in Clarity are Custom Investment Types, Ideas, and Projects
- Eligible objects in Rally are Portfolio Items (such as Themes, Epics or Initiatives, and Features)

Create an Integration Mapping – Lookup Mapping

The screenshot shows the Clarity integration mapping interface. The top navigation bar includes 'clarity', 'Integration Mappings', and 'Connect to Rally'. The main navigation tabs are 'Object Mappings', 'Rally Objects', 'Lookup Mapping', 'To Clarity', and 'To Rally'. The 'Lookup Mapping' tab is active, showing a 'New Mapping' button and a search bar. Below the navigation, there are 'Select All' and 'Deselect All' options. The main area displays a table for mapping Clarity fields to Rally fields. The table has columns for 'Name', 'Clarity Field', and 'Rally Field'. A mapping is shown for 'Strategy Goal to Theme Investment Category' with 'Goal (clr_strategy)' as the Clarity Field and 'Investment Category (Theme)' as the Rally Field. To the right, a detailed view for 'Strategy Goal to Theme Investment Category (EM00000003)' is shown, with tabs for 'Details', 'Clarity To Rally', and 'Rally To Clarity'. The 'Clarity To Rally' tab is active, showing a table with 'Clarity Lookup Value' and 'Rally Dropdown Name' columns. The table lists the following mappings:

| Clarity Lookup Value | Rally Dropdown Name |
|----------------------------|---------------------|
| Cost Avoidance | Cost Savings |
| Cost Reduction | Cost Savings |
| Grow the Business | Strategic Growth |
| Infrastructure Improvement | Maintenance |
| Maintain the Business | Maintenance |

- Navigate to Lookup Mapping
- In this example, we are mapping Clarity lookup values for the 'Goal' attribute to corresponding Rally values for Investment Category
- We see that Investment Category is on the 'Theme' portfolio item in Rally

Create an Integration Mapping – Field Mapping

The screenshot shows the Clarity integration mapping interface. The main header includes the Clarity logo, a navigation breadcrumb for 'Integration Mappings', and a 'Connect to Rally' button. Below the header, there are tabs for 'Object Mappings', 'Rally Objects', 'Lookup Mapping', 'To Clarity', and 'To Rally'. A search bar and a 'View Standard View' dropdown are also present.

The 'Object Mappings' tab is active, displaying a table of mappings. A red arrow points to the 'Epic Sync' row, which is selected. The table has columns for Name, Clarity Object, Rally Object, and Direction.

| Name * | Clarity Object * | Rally Object * ↑ | Direction * |
|---|------------------|------------------|------------------|
| <input checked="" type="checkbox"/> Epic Sync | Portfolio Epics | Epic | Clarity to Rally |
| <input type="checkbox"/> Strategy | Strategies | Theme | Clarity to Rally |

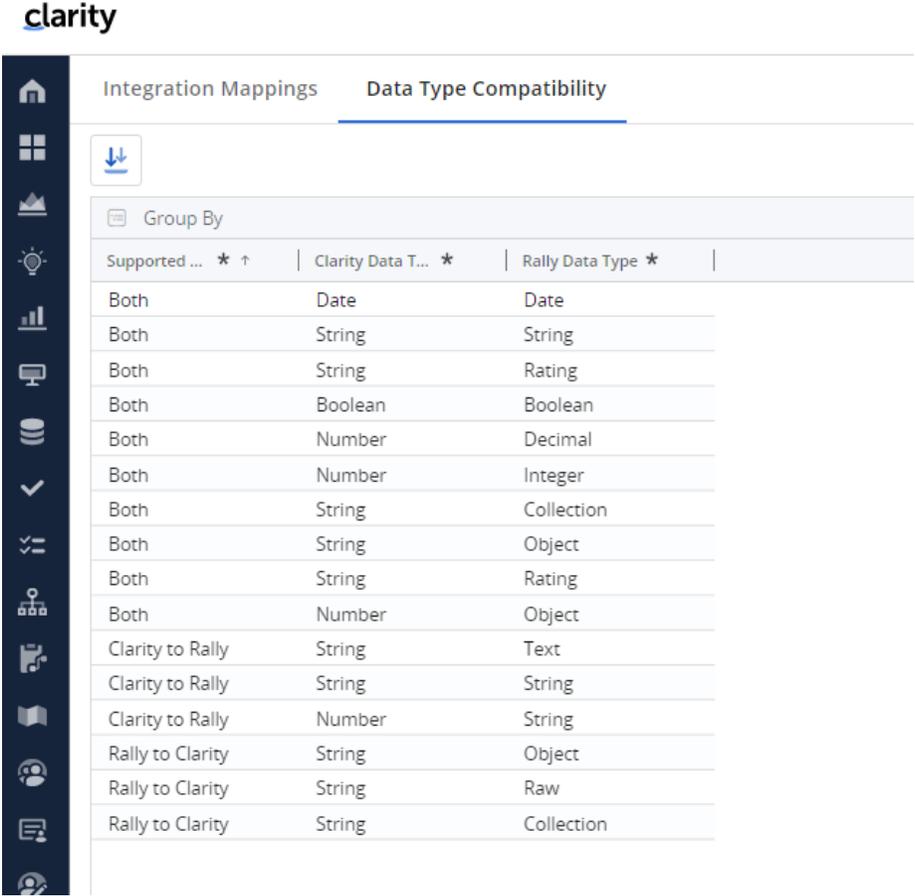
The 'Epic Sync (OM00000003)' details flyout is open, showing a 'Field Mappings' tab. A red arrow points to this tab. The flyout contains a search bar and an 'Expand' button. Below is a table of field mappings with columns for Direction, Sync Option, Clarity Field, Rally Field, Clarity Data Type, Clarity Extended D..., and Rally Data Type.

| Direction * | Sync Option * | Clarity Field * ↑ | Rally Field * | Clarity Data Type | Clarity Extended D... | Rally Data Type |
|------------------|-------------------|-------------------------------------|----------------------------------|-------------------|-----------------------|-----------------|
| Rally to Clarity | Update | % Done By Agile Plan Estimate | Percent Done By Story Plan E... | Number | percent | Decimal |
| Rally to Clarity | Update | % Done by Story Count | Percent Done By Story Count | Number | percent | Decimal |
| Rally to Clarity | Update | Accepted Story Points | Accepted Leaf Story Plan Esti... | Number | double | Decimal |
| Rally to Clarity | Update | Accepted User Stories | Accepted Leaf Story Count | Number | integer | Integer |
| Rally to Clarity | Update | Agile Actual Finish | Actual End Date | Date | | Date |
| Rally to Clarity | Update | Agile Actual Start | Actual Start Date | Date | | Date |
| Rally to Clarity | Update | Agile Planned Finish | Planned End Date | Date | | Date |
| Rally to Clarity | Update | Agile Planned Start | Planned Start Date | Date | | Date |
| Rally to Clarity | Update | Agile State | State | String | | Object |
| Rally to Clarity | Update | Agile Un-Estimated Story Count | Un-Estimated Leaf Story Count | Number | integer | Integer |
| Clarity to Rally | Create and Update | Description | Description | String | | Text |
| Rally to Clarity | Update | Estimated Story Points | Leaf Story Plan Estimate Total | Number | double | Decimal |
| Rally to Clarity | Update | Estimated User Stories | Leaf Story Count | Number | integer | Integer |
| Clarity to Rally | Create | Finish | Planned End Date | Date | | Date |
| Clarity to Rally | Create and Update | Name | Name | String | | String |
| Both | Update | Rally Project | Project | String | lookup | Object |
| Clarity to Rally | Create | Start | Planned Start Date | Date | | Date |
| Both | Update | T Shirt Storypoints | Refined Estimate | Number | integer | Integer |
| Rally to Clarity | Update | WSJF Score (SAFe scoring attribu... | WSJF Score | Number | double | Decimal |

Now you are ready to specify the specific fields you wish to map between Clarity and Rally. Select the object mapping you wish to configure, and open up the details flyout. Then select the 'Field Mappings'

Create an Integration Mapping – Field Mapping

- Field mappings specify how data is exchanged between Clarity investments/fields and Rally portfolio items/fields. Field mappings are always associated with an object mapping.
- Review the Data Type compatibility table to ensure you are mapping supported field types.



The screenshot shows the Clarity user interface with the 'Data Type Compatibility' tab selected. A table lists supported data types for integration between Clarity and Rally. The table has three columns: 'Supported ...', 'Clarity Data T...', and 'Rally Data Type *'. The rows show various data types like Date, String, Rating, Boolean, Decimal, Integer, Collection, and Object, along with specific mapping directions like 'Clarity to Rally' and 'Rally to Clarity'.

| Supported ... * ↑ | Clarity Data T... * | Rally Data Type * |
|-------------------|---------------------|-------------------|
| Both | Date | Date |
| Both | String | String |
| Both | String | Rating |
| Both | Boolean | Boolean |
| Both | Number | Decimal |
| Both | Number | Integer |
| Both | String | Collection |
| Both | String | Object |
| Both | String | Rating |
| Both | Number | Object |
| Clarity to Rally | String | Text |
| Clarity to Rally | String | String |
| Clarity to Rally | Number | String |
| Rally to Clarity | String | Object |
| Rally to Clarity | String | Raw |
| Rally to Clarity | String | Collection |

Create an Integration Mapping – Field Mapping

The screenshot shows the Clarity integration mapping interface. The main header includes the Clarity logo, a navigation breadcrumb for 'Integration Mappings', and a 'Connect to Rally' button. Below the header, there are tabs for 'Object Mappings', 'Rally Objects', 'Lookup Mapping', 'To Clarity', and 'To Rally'. A search bar and a 'View' dropdown (set to 'Standard View') are also present.

The 'Object Mappings' section displays a table with columns: Name, Clarity Object, Rally Object, and Direction. The 'Epic Sync' mapping is selected and highlighted. A red arrow points to the 'Epic Sync' row.

The 'Epic Sync (OM00000003)' details flyout is open, showing a 'Field Mappings' tab. A red arrow points to this tab. The flyout contains a table with columns: Direction, Sync Option, Clarity Field, Rally Field, Clarity Data Type, Clarity Extended D..., and Rally Data Type.

| Direction * | Sync Option * | Clarity Field * ↑ | Rally Field * | Clarity Data Type | Clarity Extended D... | Rally Data Type |
|------------------|-------------------|-------------------------------------|----------------------------------|-------------------|-----------------------|-----------------|
| Rally to Clarity | Update | % Done By Agile Plan Estimate | Percent Done By Story Plan E... | Number | percent | Decimal |
| Rally to Clarity | Update | % Done by Story Count | Percent Done By Story Count | Number | percent | Decimal |
| Rally to Clarity | Update | Accepted Story Points | Accepted Leaf Story Plan Esti... | Number | double | Decimal |
| Rally to Clarity | Update | Accepted User Stories | Accepted Leaf Story Count | Number | integer | Integer |
| Rally to Clarity | Update | Agile Actual Finish | Actual End Date | Date | | Date |
| Rally to Clarity | Update | Agile Actual Start | Actual Start Date | Date | | Date |
| Rally to Clarity | Update | Agile Planned Finish | Planned End Date | Date | | Date |
| Rally to Clarity | Update | Agile Planned Start | Planned Start Date | Date | | Date |
| Rally to Clarity | Update | Agile State | State | String | | Object |
| Rally to Clarity | Update | Agile Un-Estimated Story Count | Un-Estimated Leaf Story Count | Number | integer | Integer |
| Clarity to Rally | Create and Update | Description | Description | String | | Text |
| Rally to Clarity | Update | Estimated Story Points | Leaf Story Plan Estimate Total | Number | double | Decimal |
| Rally to Clarity | Update | Estimated User Stories | Leaf Story Count | Number | integer | Integer |
| Clarity to Rally | Create | Finish | Planned End Date | Date | | Date |
| Clarity to Rally | Create and Update | Name | Name | String | | String |
| Both | Update | Rally Project | Project | String | lookup | Object |
| Clarity to Rally | Create | Start | Planned Start Date | Date | | Date |
| Both | Update | T Shirt Storypoints | Refined Estimate | Number | integer | Integer |
| Rally to Clarity | Update | WSJF Score (SAFe scoring attribu... | WSJF Score | Number | double | Decimal |

Now you are ready to specify the specific fields you wish to map between Clarity and Rally. Select the object mapping you wish to configure, and open up the details flyout. Then select the 'Field Mappings'

Create an Integration Mapping – Field Mapping

Epic Sync (OM00000003) ✕

Details Field Mappings

🔍 Search... 🔗 Expand

| Group By | | | | | | |
|--------------------|---------------|-------------------------------|---------------------------------|-------------------|-----------------------|-----------------|
| Direction * | Sync Option * | Clarity Field * ↑ | Rally Field * | Clarity Data Type | Clarity Extended D... | Rally Data Type |
| + Rally to Clarity | Update | % Done By Agile Plan Estimate | Percent Done By Story Plan E... | Number | percent | Decimal |
| Rally to Clarity | Update | % Done by Story Count | Percent Done By Story Count | Number | percent | Decimal |

Enter the following details:

- **Direction**
 - Clarity to Rally
 - Rally to Clarity
 - Both
- **Clarity Field** – Select the relevant Clarity attribute associated with the investment identified during object mapping
- **Rally Field** – Select the Rally field to be mapping to the Clarity attribute. Make sure to following the data type compatibility guidelines
- **Sync Option** – Select from Create, Update, or Create and Update options

When Clarity validates the field mapping, the Data Type columns are populated and saved.

Executing the Integration



Executing the Integration – Select Investments to Sync

clarity Portfolio Epics

Select All Deselect All

Group By

| Starred | Name * ↑ | Strategic Theme | Integration Mappings | Rally Object | % Complete | Work Status | Delivery Timeframe |
|--------------------------|---|---|----------------------|--------------|------------|-------------|--------------------|
| <input type="checkbox"/> | Analytic Engine for Transfers | Enhance customer experience | | | 80% | On Hold | 2022-P4 |
| <input type="checkbox"/> | Automatic Deal Structuring and Decisio... | Improve User Adoption | | | | Requested | 2022-P2 |
| <input type="checkbox"/> | Build read-write API for handling loan a... | Enhance customer experience | Connect to Rally | 629997927733 | 0% | Active | 2022-P2 |
| <input type="checkbox"/> | Buy now, pay later (BNPL) solution | Enhance customer experience | | | | Requested | |
| <input type="checkbox"/> | Commercial Credit Analysis | Improve Business User Support | Connect to Rally | 629997928307 | | Active | 2022-P2 |
| <input type="checkbox"/> | Configuration Options | Harden Security | | | | Requested | 2022-P2 |
| <input type="checkbox"/> | Consumer Portal | Improve Business User Support | Connect to Rally | 629997929243 | | Active | 2022-P2 |
| <input type="checkbox"/> | Credit card error messaging | Fraud alert and response | | | 100% | Active | 2022-P1 |
| <input type="checkbox"/> | Credit card payments | Protect against weaponized AI security attacks | | | 60% | On Hold | 2022-P1 |
| <input type="checkbox"/> | Credit Score Highlighting | Improve Business User Support | Connect to Rally | 629997929469 | 0% | Requested | 2022-P3 |
| <input type="checkbox"/> | Credit Scoring | Harden Security | Connect to Rally | 629997928887 | 0% | Active | 2022-P1 |
| <input type="checkbox"/> | ★ Cyber Enhancements | Harden Security | Connect to Rally | 630719525257 | | Requested | |
| <input type="checkbox"/> | Demographic Mapper | Deliver content based on Customer Search habits | | | 100% | On Hold | 2022-P2 |
| <input type="checkbox"/> | Digital Banking as a Service | Deliver content based on Customer Search habits | | | | Requested | |
| <input type="checkbox"/> | ★ Digital Banking User Experience | Enhance customer experience | Connect to Rally | 629997928129 | | Requested | 2022-P1 |
| <input type="checkbox"/> | ★ Digital Loan App Content | Enhance customer experience | | | | Requested | 2022-P3 |

- Select the desired Integration Mapping for the investment(s) that you wish to sync with Rally
- Once sync'd, the Rally Object attribute will be populated with the Rally Object ID

Executing the Integration – Run the Integration Job

- The recommended approach is to schedule the Integration Job

Schedule the ‘Synchronize Mapped Information’ job

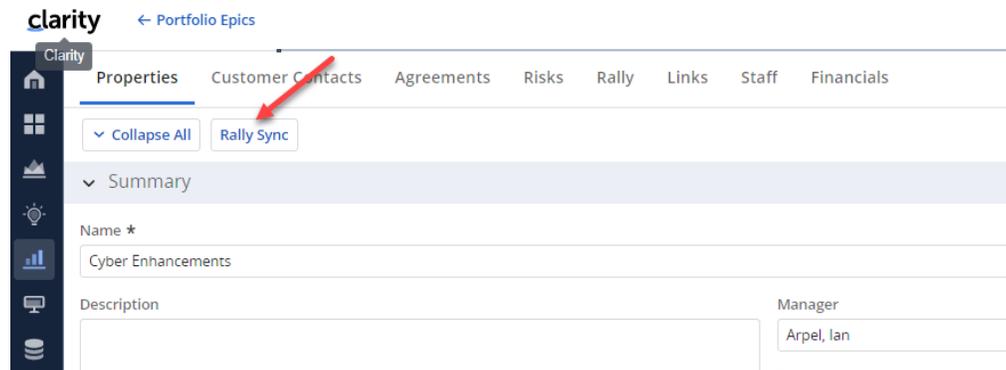
- Make sure to include the Integration Mapping parameter

The screenshot shows the Clarity interface with the 'JOBS' tab selected. The 'Jobs: Available Jobs' section displays a table of jobs. The 'Synchronize Mapped Information' job is highlighted with a red box and a red arrow pointing to it. The table has columns for Job Type, Description, Executability, Category, and Status.

| JOB TYPE | DESCRIPTION | EXECUTAB | CATEGORY | STATUS |
|--------------------------------|--|----------|----------|--------|
| *map | | All | All | Active |
| Import Integration Mappings | Import external object and field mapping metadata | | | |
| Connect to Rally | [Saved parameters] | | | |
| Synchronize Mapped Information | Synchronize external object and field attributes and populate the staging tables | | | |
| Connect to Rally | [Saved parameters] | | | |

Executing the Integration – Run the Integration Job

- There are 2 additional ways to execute the Integration Job
 - **On Demand** - execute the ‘**Synchronize Mapped Information**’ job
 - Make sure to include the Integration Mapping parameter
 - **Create a process to execute the Synchronize Mapped Information job and associate it with an Action** that can be included from the Properties page of the investment
 - *Note that this action will run the sync for all investments associated with an Integration Mapping, not just the investment from which the sync was executed*



A Field Mapping Use Case



Use Case: Map the Parent Fields within Clarity and Rally

- Create the Field Mapping for the Rally 'Parent' to Clarity 'Parent'
- Note that the Portfolio Epic 'Parent' attribute is not populated

clarity Portfolio Epics

New From Template

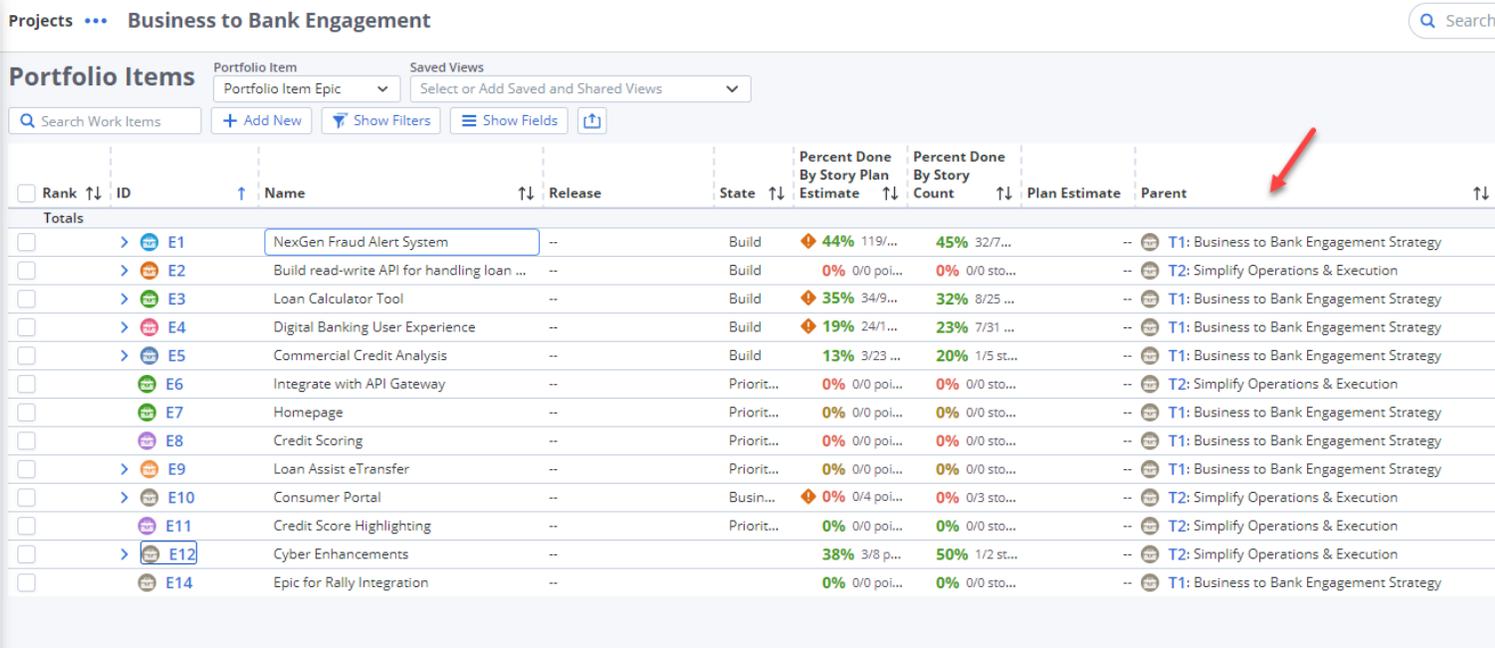
Select All Deselect All

Group By

| Starred | Name * ↑ | Strategic Theme | Parent | Integration Mappings | % Complete | Work Status |
|--------------------------|---|---|--------|----------------------|------------|-------------|
| <input type="checkbox"/> | Analytic Engine for Transfers | Enhance customer experience | | | 80% | On Hold |
| <input type="checkbox"/> | Automatic Deal Structuring and Decisio... | Improve User Adoption | | | | Requested |
| <input type="checkbox"/> | Build read-write API for handling loan a... | Enhance customer experience | | Connect to Rally | 0% | Active |
| <input type="checkbox"/> | Buy now, pay later (BNPL) solution | Enhance customer experience | | | | Requested |
| <input type="checkbox"/> | Commercial Credit Analysis | Improve Business User Support | | Connect to Rally | | Active |
| <input type="checkbox"/> | Configuration Options | Harden Security | | | | Requested |
| <input type="checkbox"/> | Consumer Portal | Improve Business User Support | | Connect to Rally | | Active |
| <input type="checkbox"/> | Credit card error messaging | Fraud alert and response | | | 100% | Active |
| <input type="checkbox"/> | Credit card payments | Protect against weaponized AI security attacks | | | 60% | On Hold |
| <input type="checkbox"/> | Credit Score Highlighting | Improve Business User Support | | Connect to Rally | 0% | Requested |
| <input type="checkbox"/> | Credit Scoring | Harden Security | | Connect to Rally | 0% | Active |
| <input type="checkbox"/> | ★ Cyber Enhancements | Harden Security | | Connect to Rally | | Requested |
| <input type="checkbox"/> | Demographic Mapper | Deliver content based on Customer Search habits | | | 100% | On Hold |
| <input type="checkbox"/> | Digital Banking as a Service | Deliver content based on Customer Search habits | | | | Requested |
| <input type="checkbox"/> | ★ Digital Banking User Experience | Enhance customer experience | | Connect to Rally | | Requested |
| <input type="checkbox"/> | ★ Digital Loan App Content | Enhance customer experience | | | | Requested |
| <input type="checkbox"/> | Digital Payments Network | Enhance customer experience | | | | Requested |

Use Case: Map the Parent Fields within Clarity and Rally

- Note that in Rally our Epics have been associated with Themes



The screenshot shows the Rally interface for 'Business to Bank Engagement' projects. The 'Portfolio Items' table lists various epics with their parent themes. A red arrow points to the 'Parent' column header.

| Rank | ID | Name | Release | State | Percent Done By Story Plan Estimate | Percent Done By Story Count | Plan Estimate | Parent |
|--------|-----|--|---------|------------|-------------------------------------|-----------------------------|---------------|--|
| Totals | | | | | | | | |
| | E1 | NexGen Fraud Alert System | -- | Build | 44% 119/... | 45% 32/7... | -- | T1: Business to Bank Engagement Strategy |
| | E2 | Build read-write API for handling loan ... | -- | Build | 0% 0/0 poi... | 0% 0/0 sto... | -- | T2: Simplify Operations & Execution |
| | E3 | Loan Calculator Tool | -- | Build | 35% 34/9... | 32% 8/25 ... | -- | T1: Business to Bank Engagement Strategy |
| | E4 | Digital Banking User Experience | -- | Build | 19% 24/1... | 23% 7/31 ... | -- | T1: Business to Bank Engagement Strategy |
| | E5 | Commercial Credit Analysis | -- | Build | 13% 3/23 ... | 20% 1/5 st... | -- | T1: Business to Bank Engagement Strategy |
| | E6 | Integrate with API Gateway | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | T2: Simplify Operations & Execution |
| | E7 | Homepage | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | T1: Business to Bank Engagement Strategy |
| | E8 | Credit Scoring | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | T1: Business to Bank Engagement Strategy |
| | E9 | Loan Assist eTransfer | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | T1: Business to Bank Engagement Strategy |
| | E10 | Consumer Portal | -- | Busin... | 0% 0/4 poi... | 0% 0/3 sto... | -- | T2: Simplify Operations & Execution |
| | E11 | Credit Score Highlighting | -- | Priorit... | 0% 0/0 poi... | 0% 0/0 sto... | -- | T2: Simplify Operations & Execution |
| | E12 | Cyber Enhancements | -- | | 38% 3/8 p... | 50% 1/2 st... | -- | T2: Simplify Operations & Execution |
| | E14 | Epic for Rally Integration | -- | | 0% 0/0 poi... | 0% 0/0 sto... | -- | T1: Business to Bank Engagement Strategy |

Use Case: Map the Parent Fields within Clarity and Rally

The screenshot shows the Clarity integration mappings interface. The main heading is "Connect to Rally". The interface is divided into several sections:

- Navigation:** "Object Mappings", "Rally Objects", "Lookup Mapping", "To Clarity", "To Rally".
- Search and View:** "Search...", "View Standard View".
- Object Mappings Table:**

| Name * | Clarity Object * | Rally Object * ↑ | Direction * |
|------------------------------------|------------------|------------------|------------------|
| <input type="checkbox"/> Epic Sync | Portfolio Epics | Epic | Clarity to Rally |
| <input type="checkbox"/> Strategy | Strategies | Theme | Clarity to Rally |
- Epic Sync (OM00000003) Field Mappings:**

| Direction * | Sync Option * | Clarity Field * ↑ | Rally Field * | Clarity Data Type | Clarity E |
|--|---------------|-------------------------------|----------------------------------|-------------------|-----------|
| <input checked="" type="checkbox"/> Rally to Clarity | Update | Parent | Parent | Number | lookup |
| <input type="checkbox"/> Rally to Clarity | Update | % Done By Agile Plan Estimate | Percent Done By Story Plan E... | Number | percen |
| <input type="checkbox"/> Rally to Clarity | Update | % Done by Story Count | Percent Done By Story Count | Number | percen |
| <input type="checkbox"/> Rally to Clarity | Update | Accepted Story Points | Accepted Leaf Story Plan Esti... | Number | double |
| <input type="checkbox"/> Rally to Clarity | Update | Accepted User Stories | Accepted Leaf Story Count | Number | integer |
| <input type="checkbox"/> Rally to Clarity | Update | Agile Actual Finish | Actual End Date | Date | |
| <input type="checkbox"/> Rally to Clarity | Update | Agile Actual Start | Actual Start Date | Date | |
| <input type="checkbox"/> Rally to Clarity | Update | Agile Planned Finish | Planned End Date | Date | |

A red arrow points to the "Update" sync option for the "Parent" field mapping.

Map the Clarity 'Parent' field with the Rally 'Parent' field, then execute the Integration (or the scheduled job will run at the specified interval.)

Use Case: Map the Parent Fields within Clarity and Rally

- After executing the integration, the Parent attribute in Clarity is now populated

clarity Portfolio Epics

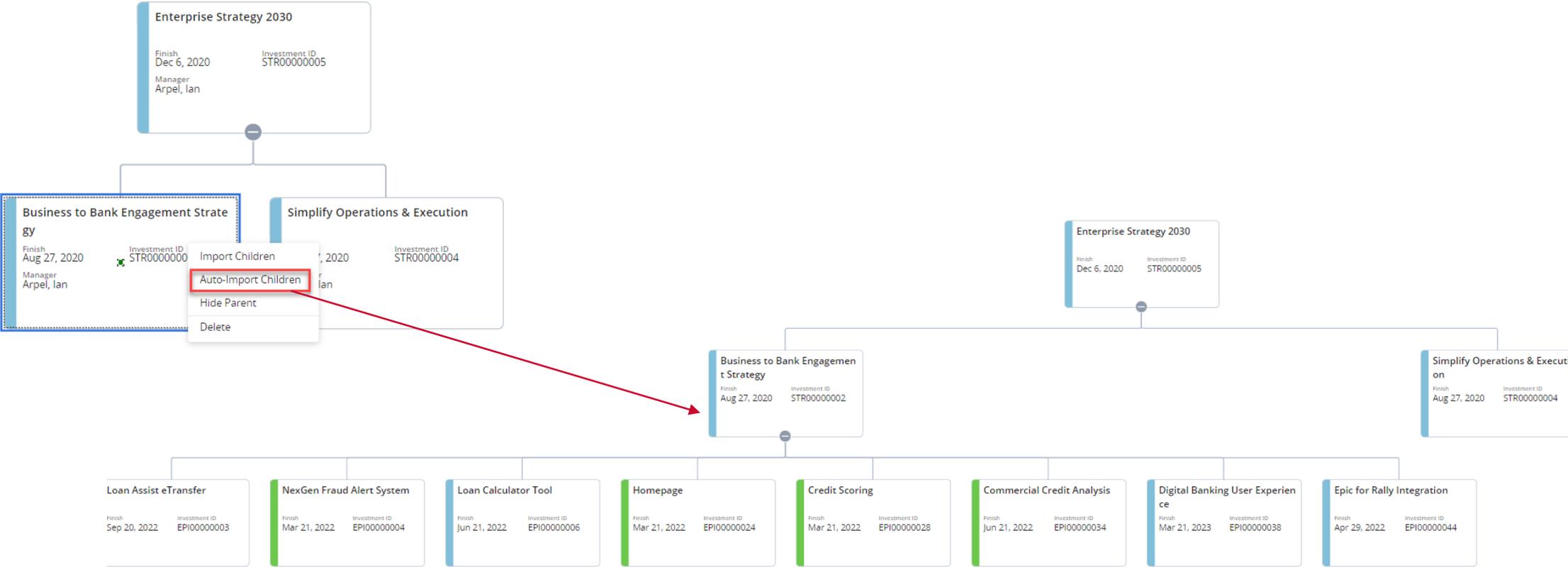
Select All Deselect All

Group By

| Starred | Name | Strategic Theme | Parent | Integration Mappings | % Complete | Work Status | Delivery Timeframe | Horizon | Capacity Type | Portf |
|--------------------------|---|---|--------------------------------------|----------------------|------------|-------------|--------------------|-----------------------|----------------|-------|
| <input type="checkbox"/> | Analytic Engine for Transfers | Enhance customer experience | | | 80% | On Hold | 2022-P4 | Horizon 3: Evaluating | Enablers | Fi |
| <input type="checkbox"/> | Automatic Deal Structuring and Decisio... | Improve User Adoption | | | | Requested | 2022-P2 | Horizon 2: Emerging | New Features | A |
| <input type="checkbox"/> | Build read-write API for handling loan a... | Enhance customer experience | | Connect to Rally | 0% | Active | 2022-P2 | Horizon 2: Emerging | Enablers | B |
| <input type="checkbox"/> | Buy now, pay later (BNPL) solution | Enhance customer experience | | | | Requested | | Horizon 2: Emerging | New Features | |
| <input type="checkbox"/> | Commercial Credit Analysis | Improve Business User Support | Business to Bank Engagement Strategy | Connect to Rally | | Active | 2022-P2 | Horizon 0: Retiring | New Features | Ir |
| <input type="checkbox"/> | Configuration Options | Harden Security | | | | Requested | 2022-P2 | Horizon 2: Emerging | Enablers | Fi |
| <input type="checkbox"/> | Consumer Portal | Improve Business User Support | | Connect to Rally | | Active | 2022-P2 | Horizon 1: Investing | New Features | A |
| <input type="checkbox"/> | Credit card error messaging | Fraud alert and response | | | 100% | Active | 2022-P1 | Horizon 1: Investing | Enablers | Ir |
| <input type="checkbox"/> | Credit card payments | Protect against weaponized AI security attacks | | | 60% | On Hold | 2022-P1 | Horizon 1: Investing | New Features | Ir |
| <input type="checkbox"/> | Credit Score Highlighting | Improve Business User Support | | Connect to Rally | 0% | Requested | 2022-P3 | Horizon 2: Emerging | New Features | R |
| <input type="checkbox"/> | Credit Scoring | Harden Security | Business to Bank Engagement Strategy | Connect to Rally | 0% | Active | 2022-P1 | Horizon 1: Investing | Enablers | A |
| <input type="checkbox"/> | Cyber Enhancements | Harden Security | | Connect to Rally | | Requested | | Horizon 2: Emerging | Enablers | A |
| <input type="checkbox"/> | Demographic Mapper | Deliver content based on Customer Search habits | | | 100% | On Hold | 2022-P2 | Horizon 1: Investing | Enablers | Ir |
| <input type="checkbox"/> | Digital Banking as a Service | Deliver content based on Customer Search habits | | | | Requested | | Horizon 3: Evaluating | | |
| <input type="checkbox"/> | Digital Banking User Experience | Enhance customer experience | Business to Bank Engagement Strategy | Connect to Rally | | Requested | 2022-P1 | Horizon 3: Evaluating | New Features | Ir |
| <input type="checkbox"/> | Digital Loan App Content | Enhance customer experience | | | | Requested | 2022-P3 | Horizon 1: Investing | New Features | Fi |
| <input type="checkbox"/> | Digital Payments Network | Enhance customer experience | | | | Requested | | Horizon 3: Evaluating | | |
| <input type="checkbox"/> | Duplicate Transfers | Protect against weaponized AI security attacks | | | 10% | Cancelled | 2022-P4 | Horizon 2: Emerging | Technical Debt | R |
| <input type="checkbox"/> | Economic pattern analytic engine | Harden Security | | | 40% | Requested | 2022-P2 | Horizon 2: Emerging | Enablers | R |
| <input type="checkbox"/> | Epic for Rally Integration | | Business to Bank Engagement Strategy | Connect to Rally | | Requested | | | | |
| <input type="checkbox"/> | Homepage | Enhance customer experience | Business to Bank Engagement Strategy | Connect to Rally | 20% | Active | 2022-P2 | Horizon 2: Emerging | Technical Debt | A |
| <input type="checkbox"/> | Implement Fraud Detection | Fraud alert and response | | | 100% | Active | 2022-P4 | Horizon 2: Emerging | Enablers | Fi |

Use Case: Map the Parent Fields within Clarity and Rally

- With the Parent attribute populated, we can now use auto-import children to populate the hierarchy



Setting Up the Integration for Custom Attributes



Adding a Custom Attribute to the Integration

- Here is our example:
 - We want to capture additional information from Rally which will help to inform the validity of our % complete metrics at the Portfolio Epic level
 - In Rally, there is a field called 'Un-Estimated Leaf Story Count'. A User Story will roll up to this count if there is no Plan Estimate for that User Story
 - A new attribute will be created in Clarity to make this Rally information visible on the Clarity Portfolio Epic

Adding a Custom Attribute to the Integration

- Here are the steps:
 1. Create a custom attribute in Clarity called 'Agile Un-Estimated Story Count'
 2. Run the Import Integration Mappings job
 3. Using the Clarity Connections Integration, map the new attribute to the Rally field 'Un-Estimated Leaf Story Count'
 4. Use Field Level Security to rename the Clarity attribute to 'Un-Estimated Story Count'
 5. Finally, we will add the new Clarity attribute to the Portfolio Epic Blueprint
 6. Run the Synchronize Mapped Information job
 7. Review the Portfolio Epic which now includes additional information from Rally!

Adding a Custom Attribute to the Integration

Step 1: Create a custom attribute in Clarity called 'Agile Un-Estimated Story Count'

Clarity

Object: Portfolio Epics | Attribute: Agile Un-Estimated Story Count - *Object Attribute*

General

ATTRIBUTE NAME
Agile Un-Estimated Story Count

ATTRIBUTE ID
vsm_agl_unest_stycnt
(ID must be alphanumeric, underscore is permitted. It must not be a SQL or Clarity reserved word.)

DESCRIPTION

DATA TYPE
Number

VALIDATION RANGE

DECIMAL PLACES
0

API ATTRIBUTE ID
v_aglUnestStycnt
(This is the attribute id used in the REST API. Set this to make the attribute available via the REST API.)

Display Mappings

Type: Color

| Color | Description | From | To |
|--------------|-----------------------|------|------|
| [--Select--] | Default Bucket | | |
| Green | All Estimated | 0 | 0 |
| Yellow | One Un-Estimated | 1 | 1 |
| Red | Multiple Un-Estimated | 2 | 1000 |

Adding a Custom Attribute to the Integration

Step 2: Run the job 'Import Integration Mappings'

The screenshot displays the Clarity software interface. On the left, a dark sidebar contains navigation icons: a hamburger menu, a home icon, a globe icon, and a link icon. The main header area shows 'Clarity' and a navigation bar with 'REPORTS' and 'JOBS' (selected). Below this, the page title is 'Jobs: Available Jobs'. A search bar for 'JOB TYPE' contains the text 'import integration'. Below the search bar are buttons for 'FILTER', 'SHOW ALL', and 'CLEAR'. A table lists available jobs:

| <input type="checkbox"/> | Job Type | |
|--------------------------|-----------------------------|---------|
| <input type="checkbox"/> | Import Integration Mappings | Import |
| <input type="checkbox"/> | Connect to Rally | [Saved] |

On the right, a modal window titled 'Job Type: Import Integration Mappings - Job Properties' is open. It has a dark sidebar with the same navigation icons. The modal content is divided into sections: 'General' with 'JOB NAME' set to 'Import Integration Mappings'; 'Parameters' with 'INTEGRATION MAPPING' set to 'Connect to Rally', where a red arrow points to the text; and 'When'.

Adding a Custom Attribute to the Integration

Step 3: Using the Clarity Connections Integration, map the new attribute to the Rally field 'Un-Estimated Leaf Story Count'

The screenshot shows the Clarity integration configuration page for 'Epic Sync'. The interface includes a navigation bar with 'Object Mappings', 'Rally Objects', 'Lookup Mapping', 'To Clarity', and 'To Rally'. The 'Object Mappings' tab is active, showing a table of mappings. The 'Epic Sync' mapping is selected, and its details are shown in the 'Field Mappings' section. A red box highlights the mapping for 'Agile Un-Estimated Story Count' to 'Un-Estimated Leaf Story Count'.

| Name * | Clarity Object * | Rally Object * ↑ | Direction * |
|---|------------------|------------------|------------------|
| <input checked="" type="checkbox"/> Epic Sync | Portfolio Epics | Epic | Clarity to Rally |
| <input type="checkbox"/> Strategy | Strategies | Theme | Clarity to Rally |

| Direction * | Sync Option * | Clarity Field * ↑ | Rally Field * | Clarity Data Type | Clarity Extended D | Rally Data Type |
|--|---------------|--------------------------------|----------------------------------|-------------------|--------------------|-----------------|
| <input checked="" type="checkbox"/> Rally to Clarity | Update | Agile Un-Estimated Story Count | Un-Estimated Leaf Story Count | Number | integer | Integer |
| Rally to Clarity | Update | % Done By Agile Plan Estimate | Percent Done by Story Plan E... | Number | percent | Decimal |
| Rally to Clarity | Update | % Done by Story Count | Percent Done By Story Count | Number | percent | Decimal |
| Rally to Clarity | Update | Accepted Story Points | Accepted Leaf Story Plan Esti... | Number | double | Decimal |
| Rally to Clarity | Update | Accepted User Stories | Accepted Leaf Story Count | Number | integer | Integer |
| Rally to Clarity | Update | Agile Actual Finish | Actual End Date | Date | | Date |
| Rally to Clarity | Update | Agile Actual Start | Actual Start Date | Date | | Date |
| Rally to Clarity | Update | Agile Planned Finish | Planned End Date | Date | | Date |
| Rally to Clarity | Update | Agile Planned Start | Planned Start Date | Date | | Date |

Adding a Custom Attribute to the Integration

Step 4: Use Field Level Security to rename the Clarity attribute to 'Un-Estimated Story Count'

clarity Attributes

Search... View Agile Attributes

Remove All Match All Match /

Add Filter **Attribute = Agile**

Group By

| Active | Attribute ↑ | Label | Attribute ID | Object | Secure | Access Edit | Access View | Database Table | Database Column |
|--------|--------------------------------|--------------------------|----------------------|------------------|--------|-------------|-------------|---------------------|----------------------|
| ✓ | Agile Risk Score | | vsm_agl_risk_score | Portfolio Epics | | | | odf_ca_clr_epic | vsm_agl_risk_score |
| ✓ | Agile Risk Score | | vsm_agl_risk_score | Roadmap Item | | | | odf_ca_rdm_road... | vsm_agl_risk_score |
| ✓ | Agile Risk Score | | agl_tsk_risk_score | Task | | | | odf_ca_task | agl_tsk_risk_score |
| ✓ | Agile State | | agl_state | Project | | | | odf_ca_project | agl_state |
| ✓ | Agile State | | cps_agile_state | Strategies | | | | odf_ca_clr_strategy | cps_agile_state |
| ✓ | Agile State | | vsm_agl_state | Portfolio Epics | | | | odf_ca_clr_epic | vsm_agl_state |
| ✓ | Agile State | | vsm_agl_state | Roadmap Item | | | | odf_ca_rdm_road... | vsm_agl_state |
| ✓ | Agile State | | ca00001397 | Connect to Rally | | | | odf_ca_odf_im000... | ca00001397 |
| ✓ | Agile State | | ca00001397 | Connect to Rally | | | | odf_ca_odf_im000... | ca00001397 |
| ✓ | Agile State | | agl_tsk_state | Task | | | | odf_ca_task | agl_tsk_state |
| ✓ | Agile State Picklist | | cps_agile_state_pick | Task | | | | odf_ca_task | cps_agile_state_pick |
| ✓ | Agile Status | | agl_tsk_status | Task | | | | odf_ca_task | agl_tsk_status |
| ✓ | Agile Sync | | clr_agile_sync | Roadmap Item | | | | odf_ca_rdm_road... | clr_agile_sync |
| ✓ | Agile System | | agl_system | Project | | | | odf_ca_project | agl_system |
| ✓ | Agile Un-Estimated Story Count | Un-Estimated Story Count | vsm_agl_unest_stycnt | Portfolio Epics | | | | odf_ca_clr_epic | vsm_agl_unest_stycnt |
| ✓ | Agile Value Score | | agl_value_score | Project | | | | odf_ca_project | agl_value_score |
| ✓ | Agile Value Score | | vsm_agl_value_score | Portfolio Epics | | | | odf_ca_clr_epic | vsm_agl_value_score |
| ✓ | Agile Value Score | | vsm_agl_value_score | Roadmap Item | | | | odf_ca_rdm_road... | vsm_agl_value_score |

Adding a Custom Attribute to the Integration

Step 5: Add the new Clarity attribute to the Portfolio Epic Blueprint

The screenshot shows the Clarity 'Portfolio Epics - EDIT MODE' interface. The top navigation bar includes 'Properties', 'Modules', 'Rules', 'Actions', and 'Create from Template'. On the right, there are 'Exit', 'Discard Edits', and 'Publish' buttons. The 'Fields' sidebar on the left contains a search bar with 'un' and a list of attributes: '% Done by Story Count', 'Business Unit Priority', 'Default Resource OBS Unit', 'Funding Risk', 'Prevent Unassigned Timeshe...', 'Un-Estimated Story Count', 'Unfair Advantage', and 'Unique Value Proposition'. The main area displays a grid of attribute cards under the 'Plan to Execution' section. A red arrow points to the 'Un-Estimated Story Count' card.

| Plan to Execution | | | | | |
|------------------------|------------------------------------|-------------------------------|------------------------|--------------------------|---------------------|
| T Shirt Size | WSJF Score (SAFe scoring attrib... | Estimated Story Points | Estimated User Stories | Agile Planned Start | Agile Actual Start |
| T Shirt Storypoints | Planned Benefit | Accepted Story Points | Accepted User Stories | Agile Planned Finish | Agile Actual Finish |
| Planned Operating Cost | Planned ROI | % Done By Agile Plan Estimate | % Done by Story Count | Un-Estimated Story Count | |

Adding a Custom Attribute to the Integration

Step 6: Run the Synchronize Mapped Information job

The screenshot displays the Clarity user interface. On the left, a sidebar contains navigation icons for home, reports, jobs, and a link icon. The main header shows 'Clarity' and a navigation bar with 'REPORTS' and 'JOBS' tabs. Below this, the 'Jobs: Available Jobs' section contains a table with the following data:

| JOB TYPE | EXECUTABLE TYPE |
|---------------------|-----------------|
| *synchronize Mapped | All |
| DESCRIPTION | CATEGORY |
| | All |
| STATUS | |
| Active | |

Below the table are buttons for 'FILTER', 'SHOW ALL', and 'CLEAR'. A list of job types is shown with checkboxes: 'Synchronize Mapped Information' and 'Connect to Rally'. A secondary window is open, titled 'Clarity Job Type: Synchronize Mapped Information - Job Properties'. It has sections for 'General', 'Parameters', and 'When'. In the 'Parameters' section, the 'INTEGRATION MAPPING' field is set to 'Connect to Rally', with a red arrow pointing to it. A 'SAVE PARAMETERS' button is located below the parameters section.

Adding a Custom Attribute to the Integration

Step 7: Review the Portfolio Epic which now includes additional information from Rally!

The screenshot shows the Clarity software interface for a Portfolio Epic. The top header displays the project name 'NexGen Fraud Alert System' with a status of 'On Track' and the ID 'EPI00000004'. The main content area is divided into several sections: Properties, Customer Contacts, Agreements, Risks, Rally, Links, and Staff. The 'Plan to Execution' section is expanded, showing a grid of data fields. A red arrow points to the 'Un-Estimated Story Count' field, which has a value of 7.

| T Shirt Size | WSJF Score (SAFe scoring attribute) | Estimated Story Points | Estimated User Stories | Agile Planned Start | Agile Actual Start |
|------------------------|-------------------------------------|-------------------------------|------------------------|--------------------------|---------------------|
| XL | 0 | 268 | 71 | Feb 1, 2022 | Mar 22, 2022 |
| T Shirt Storypoints | Planned Benefit | Accepted Story Points | Accepted User Stories | Agile Planned Finish | Agile Actual Finish |
| 0 | \$110,000 | 119 | 32 | Jun 4, 2022 | |
| Planned Operating Cost | Planned ROI | % Done By Agile Plan Estimate | % Done by Story Count | Un-Estimated Story Count | |
| \$45,000 | 15.79% | 44.4% | 45.07% | 7 | |

This insight tells us that although we appear to be 44% done based on story point completion, we still have 7 stories that have not been estimated. Those estimates will eventually factor into our estimated story points.

Visibility to Integration Metrics and Reporting



Use Grid Views to Expose Rally Metrics

clarity Portfolio Epics

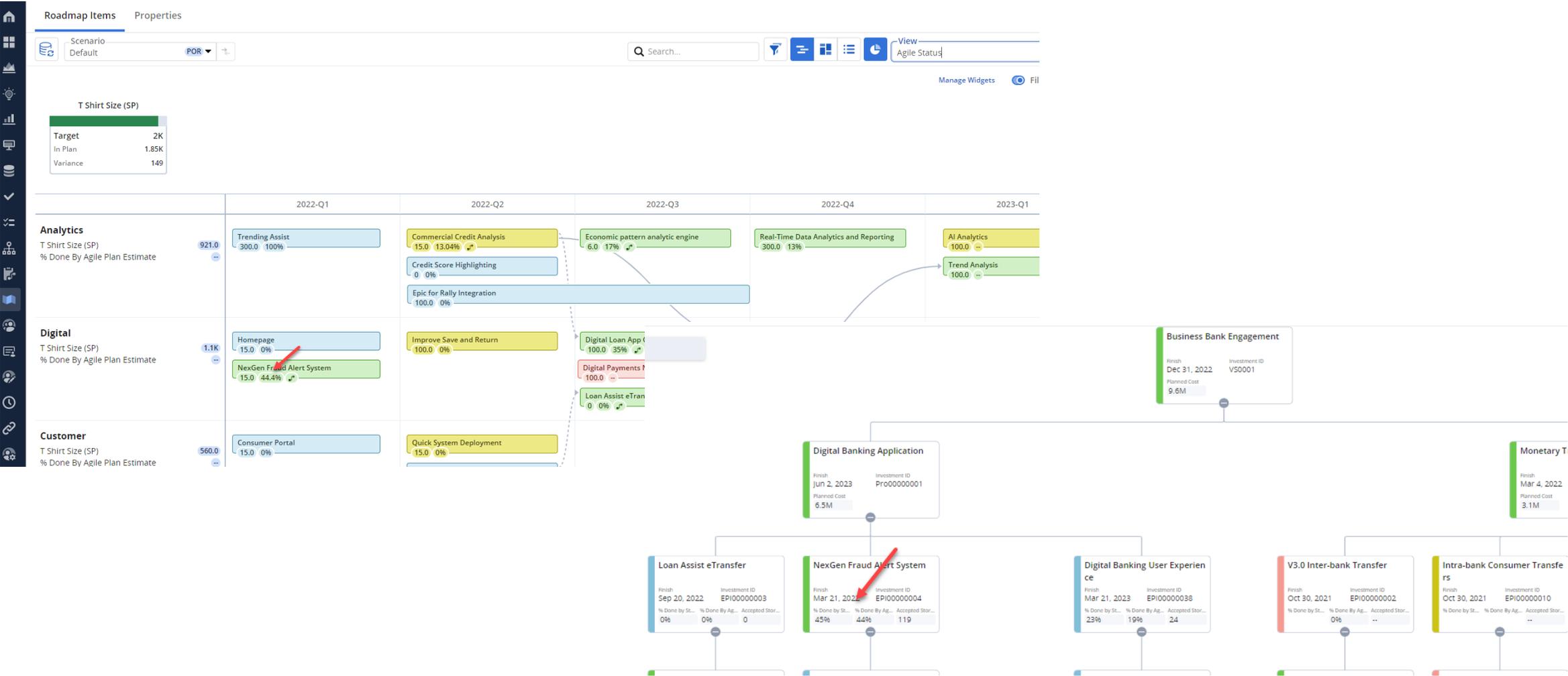
Select All Deselect All

Group By

Search... View Portfolio Epics Save

| Starred | Name * ↑ | Strategic Theme | % Complete | Work Status | Delivery Timeframe | Horizon | Capacity Type | Portfolio Lifecycle | Accepted Story Points | % Done By Story Count |
|--------------------------|---|---|------------|-------------|--------------------|-----------------------|----------------|---------------------|-----------------------|-----------------------|
| <input type="checkbox"/> | Analytic Engine for Transfers | Enhance customer experience | 80% | On Hold | 2022-P4 | Horizon 3: Evaluating | Enablers | Funnel | | |
| <input type="checkbox"/> | Automatic Deal Structuring and Decisio... | Improve User Adoption | | Requested | 2022-P2 | Horizon 2: Emerging | New Features | Analyzing | 0 | 0% |
| <input type="checkbox"/> | Build read-write API for handling loan a... | Enhance customer experience | 0% | Active | 2022-P2 | Horizon 2: Emerging | Enablers | Backlog | 0 | 0% |
| <input type="checkbox"/> | Buy now, pay later (BNPL) solution | Enhance customer experience | | Requested | | Horizon 2: Emerging | New Features | | | |
| <input type="checkbox"/> | Commercial Credit Analysis | Improve Business User Support | | Active | 2022-P2 | Horizon 0: Retiring | New Features | Implementing | 3 | 20% |
| <input type="checkbox"/> | Configuration Options | Harden Security | | Requested | 2022-P2 | Horizon 2: Emerging | Enablers | Funnel | | |
| <input type="checkbox"/> | Consumer Portal | Improve Business User Support | | Active | 2022-P2 | Horizon 1: Investing | New Features | Analyzing | 0 | 0% |
| <input type="checkbox"/> | Credit card error messaging | Fraud alert and response | 100% | Active | 2022-P1 | Horizon 1: Investing | Enablers | Implementing | | |
| <input type="checkbox"/> | Credit card payments | Protect against weaponized AI security attacks | 60% | On Hold | 2022-P1 | Horizon 1: Investing | New Features | Implementing | | |
| <input type="checkbox"/> | Credit Score Highlighting | Improve Business User Support | 0% | Requested | 2022-P3 | Horizon 2: Emerging | New Features | Reviewing | 0 | 0% |
| <input type="checkbox"/> | Credit Scoring | Harden Security | 0% | Active | 2022-P1 | Horizon 1: Investing | Enablers | Analyzing | 0 | 0% |
| <input type="checkbox"/> | Cyber Enhancements | Harden Security | | Requested | | Horizon 2: Emerging | Enablers | Analyzing | 3 | 50% |
| <input type="checkbox"/> | Demographic Mapper | Deliver content based on Customer Search habits | 100% | On Hold | 2022-P2 | Horizon 1: Investing | Enablers | Implementing | | |
| <input type="checkbox"/> | Digital Banking as a Service | Deliver content based on Customer Search habits | | Requested | | Horizon 3: Evaluating | | | | |
| <input type="checkbox"/> | Digital Banking User Experience | Enhance customer experience | | Requested | 2022-P1 | Horizon 3: Evaluating | New Features | Implementing | 24 | 23% |
| <input type="checkbox"/> | Digital Loan App Content | Enhance customer experience | | Requested | 2022-P3 | Horizon 1: Investing | New Features | Funnel | | |
| <input type="checkbox"/> | Digital Payments Network | Enhance customer experience | | Requested | | Horizon 3: Evaluating | | | | |
| <input type="checkbox"/> | Duplicate Transfers | Protect against weaponized AI security attacks | 10% | Cancelled | 2022-P4 | Horizon 2: Emerging | Technical Debt | Reviewing | | |
| <input type="checkbox"/> | Economic pattern analytic engine | Harden Security | 40% | Requested | 2022-P2 | Horizon 2: Emerging | Enablers | Reviewing | | |
| <input type="checkbox"/> | Epic for Rally Integration | | | Requested | | | | | 0 | 0% |
| <input type="checkbox"/> | Homepage | Enhance customer experience | 20% | Active | 2022-P2 | Horizon 2: Emerging | Technical Debt | Analyzing | 0 | 0% |
| <input type="checkbox"/> | Implement Fraud Detection | Fraud alert and response | 100% | Active | 2022-P4 | Horizon 2: Emerging | Enablers | Funnel | | |
| <input type="checkbox"/> | Improve Save and Return | Enhance customer experience | 70% | Active | 2022-P2 | Horizon 1: Investing | Maintenance | Reviewing | | |
| <input type="checkbox"/> | Integrate with API Gateway | Harden Security | 0% | Requested | 2022-P2 | Horizon 1: Investing | Enablers | Analyzing | 0 | 0% |
| <input type="checkbox"/> | Intra-bank Consumer Transfers | Improve Business User Support | 70% | On Hold | 2022-P2 | Horizon 1: Investing | New Features | Implementing | | |
| <input type="checkbox"/> | Knowledgebase | Deliver content based on Customer Search habits | 50% | Cancelled | 2022-P4 | Horizon 3: Evaluating | New Features | Reviewing | | |
| <input type="checkbox"/> | Loan Assist eTransfer | Improve User Adoption | 70% | Requested | 2022-P2 | Horizon 0: Retiring | New Features | Backlog | 0 | 0% |
| <input type="checkbox"/> | Loan Calculator Tool | Enhance customer experience | 60% | Requested | 2022-P1 | Horizon 1: Investing | Technical Debt | Implementing | 34 | 32% |
| <input type="checkbox"/> | NextGen Fraud Alert System | Harden Security | 10% | Active | 2022-P2 | Horizon 1: Investing | New Features | Implementing | 119 | 45% |

Hierarchies & Roadmaps



3rd Party Visualization Tools – PBI, Tableau

clarity [← Value Streams](#) Business Bank Engagement On Track
VS0001

Properties Staff Financials Capacity % Horizon % Strategy % Financial Review Lean Guardrails Strategy & Key Results **Epic Status** Links

Portfolio Epic Status Report

Value Stream: Business to Bank Engagement **Digital Product:** Digital Banking Application **Delivery Timeframe:** All

T Shirt Size by Portfolio Lifecycle

| Lifecycle Stage | T-Shirt Size |
|-----------------|--------------|
| Funnel | 445 |
| Reviewing | 115 |
| Analyzing | 121 |
| Backlog | 115 |
| Implementing | 961 |

T Shirt Size by Capacity Type

| Capacity Type | T-Shirt Size |
|---------------|--------------|
| Maintenance | 115 |
| Enablers | 591 |
| New Features | 936 |

T Shirt Storypoints by Strategic Theme

| Strategic Theme | T-Shirt Storypoints |
|-------------------------------|---------------------|
| Enhance customer experience | ~550 |
| Harden Security | ~450 |
| Improve Business User Support | ~400 |
| Improve User Adoption | ~200 |

| Name | What pain does this solution solve? | Who will use this capability? | % Complete | Horizon | T Shirt Size | T Shirt Storypoints |
|----------------------------|---|-------------------------------|------------|-----------------------------------|--------------|---------------------|
| NexGen Fraud Alert System | Alerts to prevent identity theft or misuse PI data | Consumers & B2B customers | 44% | Horizon 1: Investing / Extracting | XL | 100 |
| Commercial Credit Analysis | Consolidate business credit reports in one easily consumable location | B2B | 90% | Horizon 0: Retiring | M | 15 |
| Credit Score Highlighting | Consolidate our customer credit reports in one easily consumable location | Consumers | 0% | Horizon 2: Emerging | M | 15 |
| Credit Scoring | Consolidate our customer credit reports in one easily consumable location | Consumers | 90% | Horizon 1: Investing / Extracting | L | 40 |
| Quick System Deployment | DevOps Refresh automation | Engineering | 0% | Horizon 1: Investing / Extracting | M | 15 |
| Product Listings | Improve access to offering listings and optimize the value we offer | Consumers | 0% | Horizon 0: Retiring | M | 15 |
| Homepage | Improve mobile access | Consumers B2B | 20% | Horizon 2: Emerging | M | 15 |
| Consumer Portal | Improve mobile portal capabilities - customer voice | Consumers | 0% | Horizon 1: Investing / Extracting | S | 6 |



Other Administration Topics



Integration Prerequisites

- Assign the **Integration Mapping - Navigate** access right to the administrators who will configure the Clarity-Rally integration. Users with the Integration Mapping - Navigate right will be able to view and access the Integrations tile on the Administration page.
- Ensure the **latest version of the PMO-Accelerator content add-in** is installed. With the latest version of the PMO-Accelerator installed, Clarity will include the 'Rally Object ID' and the 'Integration Mapping' attributes for configuration in Projects, Ideas, and Custom Investments.

Documentation – make sure to access the right TechDocs area!

- The **Clarity Connections** documentation can be found in ‘Getting Started with Clarity Administration’ in the ‘Using Clarity’ section.
- Note that the ‘**Legacy**’ **Clarity to Rally Connector** (Project based) documentation can be found in the ‘Add-Ins and Integrations’ section.

CLARITY - 16.0.1

CA Enterprise Software / Business Management / Clarity - 16.0.1 / Using Clarity / Getting Started with Clarity Administration / Clarity Connections - Rally Integrations

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Clarity: Configure Teams on the Resources Page

Create, Edit, and Delete Menu Links

Clarity: Viewing Custom Objects and Subobjects

Getting Started with Clarity Administration

Setting Up Clarity: First Time Use

Getting Started with Blueprints Grid (Beta)

Getting Started with Blueprints

Secure Field Level Access

Clarity: System Settings

Clarity: Configure Custom Investment Types

Authentication and Keys

Clarity Connections - Rally Integrations

Clarity Connections - Rally Integrations

Last Updated March 28, 2022

Organizations can use the new and improved Clarity-Rally integration to ensure data flows seamlessly between the two applications.

The new and improved Clarity-Rally integration is:

- Easily extensible and configurable: You can map objects and attributes between Clarity and Rally to ensure the integration meets your specific requirements.
- Simple to maintain: The integration can be set up and maintained by Clarity administrators who have basic Classic PPM knowledge.
- Validated and Supported by Broadcom: You don't need to perform regression testing after every release.

Let's review some key steps you need to perform to leverage this integration.

1. Complete the relevant prerequisites to configure the integration.
2. Create an Integration Object to integrate Clarity with a specific Rally instance.
3. Create an Integration Mapping.
4. Run the Import Integration Mapping job, to fetch all Rally portfolio item type objects and their associated attributes.

CLARITY - 16.0.1

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Advanced Reporting with Jaspersoft

Reference

Add-Ins and Integrations

Add-in: CA Application Portfolio Management (APM)

Add-in: PMO Accelerator

Integrate Clarity with Rally

Plan for the Integration

Prepare for the Integration

Configure the Integration

Associate Clarity Projects with Rally and Synchronize Data

Integrate Clarity with Rally

Last Updated March 28, 2022

If your organization is using Clarity to manage investments and their associated funding, and Rally for Agile development and execution, the Clarity-Rally integration helps bridge the informational gap between investment planning and execution. Oftentimes, reports are used to aggregate data from multiple systems, or spreadsheets, to correlate information related to investment planning and execution status. With this integration, you can,

- Align a Rally initiative with a Clarity project.
- Associate multiple Rally investments and initiatives with a single Clarity project.
- Fund and track execution across multiple Rally teams.
- Get work details such as features and user stories, from Rally to Clarity.
- Synchronize data bi-directionally to monitor execution activities in either Clarity or Rally.
- Track actuals within Clarity against Rally features and user stories.

With the Clarity-Rally integration, you will obtain the following benefits:

- **Transparency:** At the project or investment-level in Clarity, you have visibility of (but not limited to)

Configuring an Admin Custom Object

The image consists of three sequential screenshots from the Clarity software interface, illustrating the steps to configure an Admin Custom Object.

Screenshot 1: Shows the main Clarity dashboard with a sidebar on the left. The 'Administration' link is highlighted with a red arrow, indicating the first step in the configuration process.

Screenshot 2: Shows the 'Administration' menu expanded in the sidebar. The 'Administration' option is selected, also indicated by a red arrow.

Screenshot 3: Shows the configuration page for a custom object. The breadcrumb trail is 'Administration > Sync Mapped Information'. The page title is 'Job Type: Synchronize Mapped Information - Job Properties'. The 'General' section shows the 'JOB NAME' as 'Synchronize Mapped Information'. The 'Parameters' section shows the 'INTEGRATION MAPPING' as 'Connect to Rally'. A 'SAVE PARAMETERS' button is visible at the bottom of the configuration area.



Thank You



