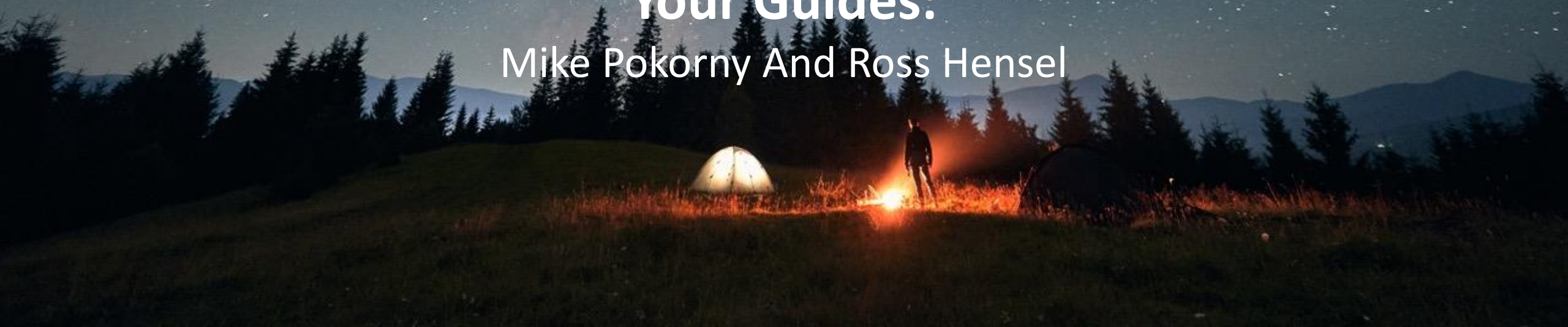




Latest Clarity Release | Value Overview

Your Guides:

Mike Pokorny And Ross Hensel



Agenda

- Introduction
- Key Differences between Classic and Modern UX
- Classic Functionality Not Fully in the Modern UX, yet
- Enhancements in 15.9.3

What is New?



Let Rego be your guide.

Classic Functionality Not Fully in the Modern UX, yet



Let Rego be your guide.

Modern UX Usability – Release Plans (High Items)

Item	2021-Q4	2022-Q1	2022-Q2
Overall Items			
Menu Channels to allow links to resource object or others	Not Planned (partial with use of Pages)		
Resource Management			
Team Allocations flowing back to Resource Allocations		Targeted	
Financial Management			
Multi-Currency		Targeted	

Modern UX Usability – Release Plans (Medium Items)

Item	2021-Q4	2022-Q1	2022-Q2
Overall Items			
Ability to view of Processes, manual execution of processes		Targeted	
Native Portlet/Report placement in Modern vs. Channels		Targeted	
Dynamic Lookups cannot be used in Color-By/Columns	Not Planned		
Link from a Classic portlet to a Modern UX Investment object	Not Planned (Rego AddOn)		
Roadmap Management			
No Role-based Targets	Not Planned		
MVL Parameterized Lookup Sync		Targeted	
Demand Management			
Replace Incidents (provide an object that does not require FF license to create/edit)	Not Planned		
Project Management			
Baselining (partial today)	Targeted		

Modern UX Usability – Release Plans (Low Items)

Item	2021-Q4	2022-Q1	2022-Q2
Overall Items			
Ability to add hints or tooltips	Targeted		
Ability to display icons in list views	Not Planned		
Migrate blueprints between environments	Not Planned (Rego AddOn)		
Required Fields are not really required (Save as you go)	Not Planned		
No home page	Not Planned		
Project Management			
Project Tile Views has limited filter objects		Targeted	
Convert risks to issues to change requests	Not Planned		
Document check in/out + version control	Not Planned		

Modern UX Usability – Release Plans (Low Items)

Item	2021-Q4	2022-Q1	2022-Q2
Roadmap Management			
Export Options		Targeted	
Resource Management			
Allow multi-resource replacement (1 role filled by many resources)		Targeted	
Requisitions	Not Planned		
Time Management			
Ability to drill into task or project from timesheet to update fields	Not Planned		
Ability to quick link for a user to go right to their current timesheet	Targeted		

Enhancements in 15.9.3



Let Rego be your guide.

Enhancements in 15.9.3

- Modern UX WCAG Compliance (Continued)
- Project Management
 - Inline editing in Task Timeline
 - Baselines module (Projects)
 - Project lock indicator (when project is opened in MSP/Workbench)
 - Separated Create and Create from Template security rights
 - Create from Project Template uses a grid (no carousel)
 - Blueprint specific required fields
 - Shift dates using +/- number of days
 - Field Level Security
 - Risks, Issues, and Changes
 - Visual Widgets (To-Do's grid)
- Resource Management
 - New Staffing Workspace
 - Existing Staff Plan Workspace (renamed) confirms allocation deletions
 - Field Level Security on Team
- Ideas and Custom Investment Types
 - Status Reports (grid)
- Reporting
 - Update DWH and Add-ins for Status Report move to the Investment Object
- Mobile
 - Time Approval

Enhancements in 15.9.3 Con't

- Roadmap Enhancements
 - Sync Roadmap Item Name (Investment name)
 - Refactored Roadmap Timeline
 - Scenario Comparisons, Adjustable swimlane column, and updated dependency drawing
 - Field Level Security on Roadmaps and Roadmap Items
 - Blueprints with Channels
- Hierarchy Enhancements
 - Aggregated Risks, Issues, and Change Requests
 - Visual widgets
 - Parent Lookup on Investments (define/choose your parent)
 - Auto-Import children
- General Enhancements
 - Fill handle in common grids
 - Enhanced lookup display
 - Saved Views have an option to share along with last updated date
 - Relabeling of attributes
 - SSO Support for login message
 - Task Owner field added to XOG
 - Object Actions for calling processes (Master Investments)
 - Business Rules
 - Read-only condition
 - Dynamic update on hide/show modules/sections
 - Custom TSV Support

A scenic landscape featuring a large body of water (likely a lake or bay) in the middle ground, surrounded by lush green hills and mountains. In the foreground, two hikers with backpacks are walking along a dirt path on a grassy slope. The sky is filled with large, white, fluffy clouds, and a dark mountain peak is visible through the clouds in the background. A semi-transparent white banner with a geometric pattern is overlaid across the middle of the image.

LIVE DEMONSTRATION!!

Questions?



Let Rego be your guide.

The background image is a scenic landscape. In the foreground, a dirt trail leads up a grassy hillside. Two hikers, a woman in a grey shirt and a man in a yellow shirt, are walking away from the camera. In the middle ground, a large body of water is visible, with a small town or village on the far shore. In the background, a mountain peak is visible, partially obscured by a large, white, fluffy cloud. The sky is blue with scattered clouds.

Appendix of Screenshots and more!

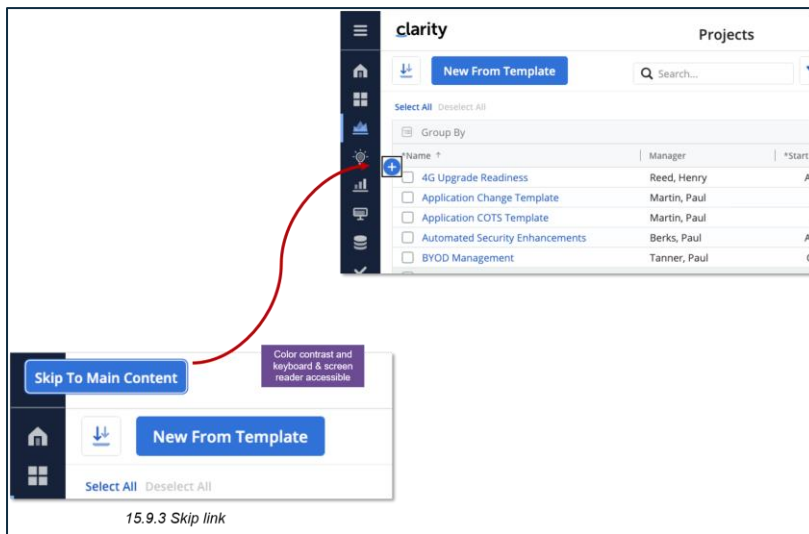
General Enhancements



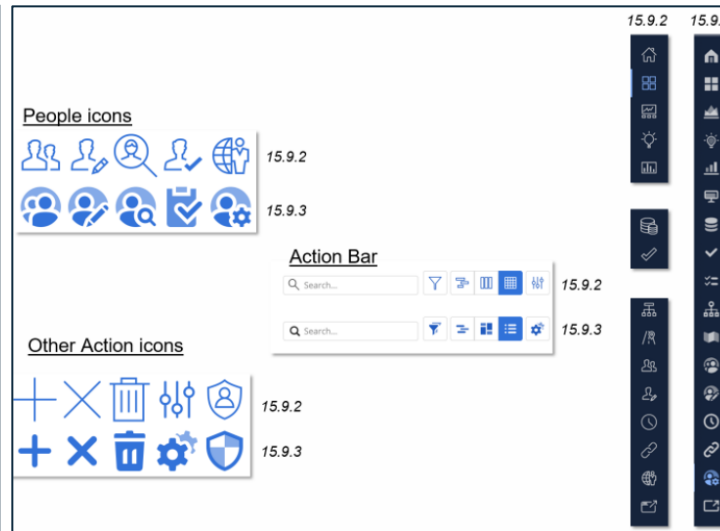
Continued Enhancements for WCAG

Clarity is committed to ensuring support for Web Content Accessibility Guidelines. In this release, several additional enhancements have been introduced to improve accessibility. They include support for visible focus requirements, keyboard and screen reader accessibility, skip link, improved icons, toast messages, and UX styling updates.

Skip Link



Icons



Informative Banners



General Usability Enhancements

The common grid component allows for users to be able use the fill handle to drag and populate a series of cells. Lookup displays can now show additional data from the lookup to help inform users of their selections. Saved views now have the option of being shared or marked as private to reduce the footprint of the list.

Fill Handle

The screenshot shows a data grid with columns for *Name, Region, and *ID. A red square highlights the fill handle (a small blue square) in the Region column of the first row. A red arrow points from this handle to the Region column of the last row, indicating the drag-and-drop action to copy data.

*Name ↑	Region	*ID
<input type="checkbox"/> A Collaboration Initiative	North America	PR1095
<input type="checkbox"/> A Finance Process Change		PRS1000
<input type="checkbox"/> A Mobile App for Snack Orders		
<input type="checkbox"/> A New Product Launch		
<input type="checkbox"/> A new project that we need to do		
<input type="checkbox"/> A New Report that targets analysis		

Lookup Display

The screenshot shows a lookup display with a search bar and a list of items. A red box highlights the list of items, which includes checkboxes and names. The items are organized into two columns: one for the item name and one for the user name.

Region	*ID	Steering Committee	Project Type
North America	PR1095	Search...	Major Project
	PRS1000	Clear All	m
	PR1169	<input type="checkbox"/> AB Team	TM00001
	PR1150	<input type="checkbox"/> Abbott, Karl	karlAbbott
	PR1244	<input type="checkbox"/> Adams, Benjamin	benjaminAdams
	PR1299	<input type="checkbox"/> Admin, PMO	csk.admin
	PR1132	<input type="checkbox"/> Admin, Rego	admin2
	PR1151	<input type="checkbox"/> Administrator, Clarity	admin
	PR1211	<input type="checkbox"/> Administrator, NPD	npd_admin
	PR1180	<input type="checkbox"/> Agency Team	TM00002
	PR1181	<input type="checkbox"/> Agile, Andre	andreAgile
	PR1161	<input type="checkbox"/> Allen, Timothy	timothyAllen
	PR1152		

Share Views

The screenshot shows a 'SAVE VIEW' dialog box. It has a text input field for the view name, which is 'Mike's Finance View'. Below the input field is a checkbox labeled 'Share with everyone'. The dialog box also has 'Cancel' and 'Save' buttons.

SAVE VIEW

View *

Mike's Finance View

☐ Share with everyone

Cancel Save

General Usability Enhancements (2)

Administrators now have the ability to change the display label of out of the box attributes. Users can run actions that are associated to their project blueprint for calling processes from a drop-down.

Attribute Labels

Attribute Labels configuration interface. The table shows attributes for the 'Project' object, with the 'Label' column highlighted in red. A red arrow points from the 'Project Completion % (changed)' label in the table to the corresponding label in the project form below.

Attribute	Label	Attribute ID	Object	Secure	Access Edit
% Complete	Project Completion % (changed)	percent_complete	Project		
% Complete Calculation ...		percent_calc_mode	Project		
% Done By Agile Plan Est...		agl_pctdon_plest	Project		
% Done by Story Count		agl_pctdon_stc	Project		
Accepted Story Points					

Project form fields (Project ID: PR1095):

- Project Name: A Collaboration Initiative
- Start: Apr 15, 2019
- Finish: Aug 31, 2022
- Project Completion % (changed): 25%
- Department OBS: Corporate:Product Management
- Objective: Collaboration Initiative

Object Actions

Object Actions configuration interface. The table shows actions for the 'Project' object, with the 'Set Project Financials' action highlighted in red. A red arrow points from the 'Set Project Financials' action in the table to the corresponding action in the project form below.

*Order	*Name	*ID	*Enabled	*Process Name
1	Set Project Financials	00000001	✓	Set Project Financials
2	Blueprint - Toggle to IT or NPD	00000002	✓	Blueprint - Toggle to IT or NPD

Project form fields (Project ID: PR1095):

- Project Name: A Collaboration Initiative
- Start: Apr 15, 2019
- Finish: Aug 31, 2022
- Project Completion % (changed): 25%
- Department OBS: Corporate:Product Management
- Objective: Collaboration Initiative

General Usability Enhancements (3)

The Modern UX now supports the use and display of custom time-scaled values. Additional business rules have been created to add conditions to make data read-only.

Custom Time-scaled Values

Properties

Dashboard

Tasks

Links

Agile Perform...

Rally

Risks

Issues

Changes

Conversations

Staff

Status

Documents

Download

Search...

<

Per-Period Metrics - 9 Periods

>

Filter

Settings

Select All

Deselect All

Group By

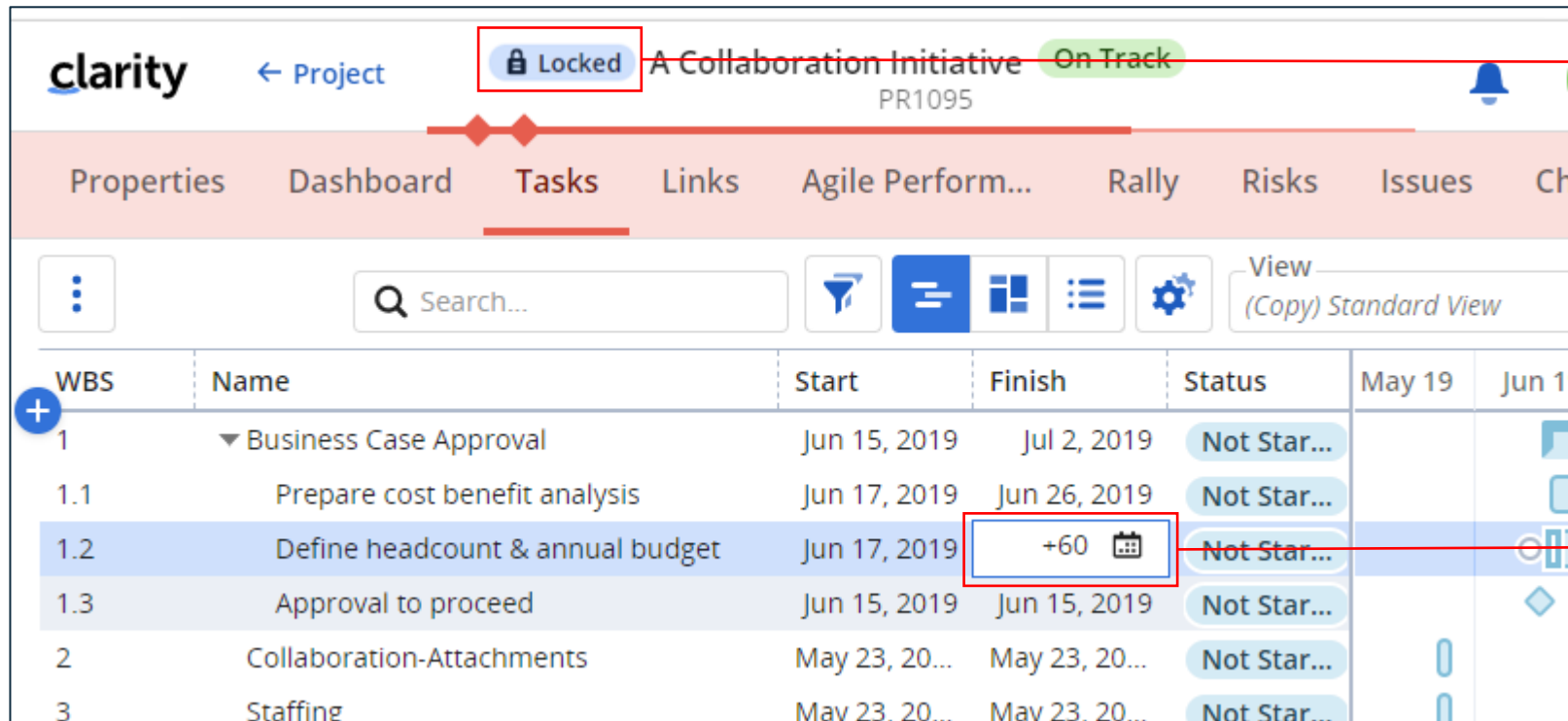
					Jan 12, 2020	Jan 19, 2020	Jan 26, 2020	Feb 2, 2020	Feb 9, 2020
*Name ↑	*Priority	Probability	Impact	*Status	Users Impacted	Users Impacted	Users Impacted	Users Impacted	Users Imp
<div><div>Change Management Requirements</div></div>	Medium	Low	Medium	Open	0.00	0.00	0.00	0.00	

Project Management Enhancements



Project Management Enhancements – Task Timeline and Dates

When a project is opened in a scheduler, there is a new “Locked” icon next to the project name. From the Task Timeline, now users have inline editing of fields and the ability to add a number of days to a date. (Example: +60)



The screenshot shows the Clarity project management interface. At the top, the project name 'A Collaboration Initiative' is displayed with a 'Locked' icon (a padlock) and an 'On Track' status. Below the project name is a navigation bar with tabs: Properties, Dashboard, Tasks (selected), Links, Agile Perform..., Rally, Risks, Issues, and Ch. Below the navigation bar is a search bar and a 'View' dropdown set to '(Copy) Standard View'. The main content area displays a task timeline table with columns: WBS, Name, Start, Finish, Status, May 19, and Jun 19. The table contains several tasks, with task 1.2 'Define headcount & annual budget' highlighted. In the 'Finish' column of task 1.2, there is an inline editing field showing '+60' and a calendar icon, which is highlighted by a red box.

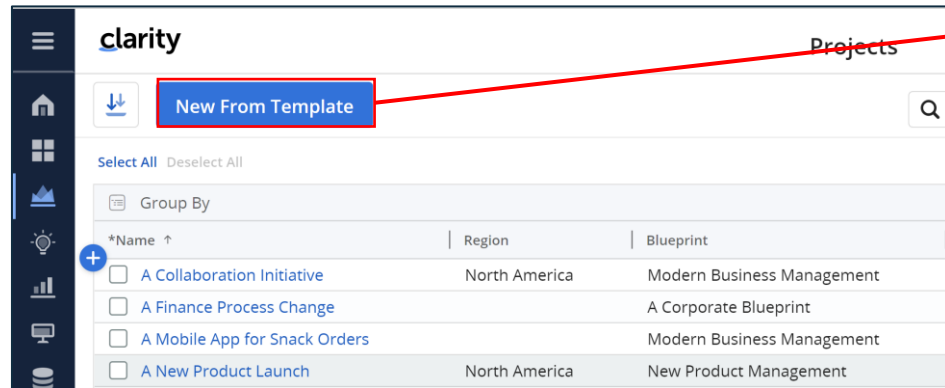
WBS	Name	Start	Finish	Status	May 19	Jun 19
1	▼ Business Case Approval	Jun 15, 2019	Jul 2, 2019	Not Star...		
1.1	Prepare cost benefit analysis	Jun 17, 2019	Jun 26, 2019	Not Star...		
1.2	Define headcount & annual budget	Jun 17, 2019	+60	Not Star...		
1.3	Approval to proceed	Jun 15, 2019	Jun 15, 2019	Not Star...		
2	Collaboration-Attachments	May 23, 20...	May 23, 20...	Not Star...		
3	Staffing	May 23, 20...	May 23, 20...	Not Star...		

Project Lock Icon

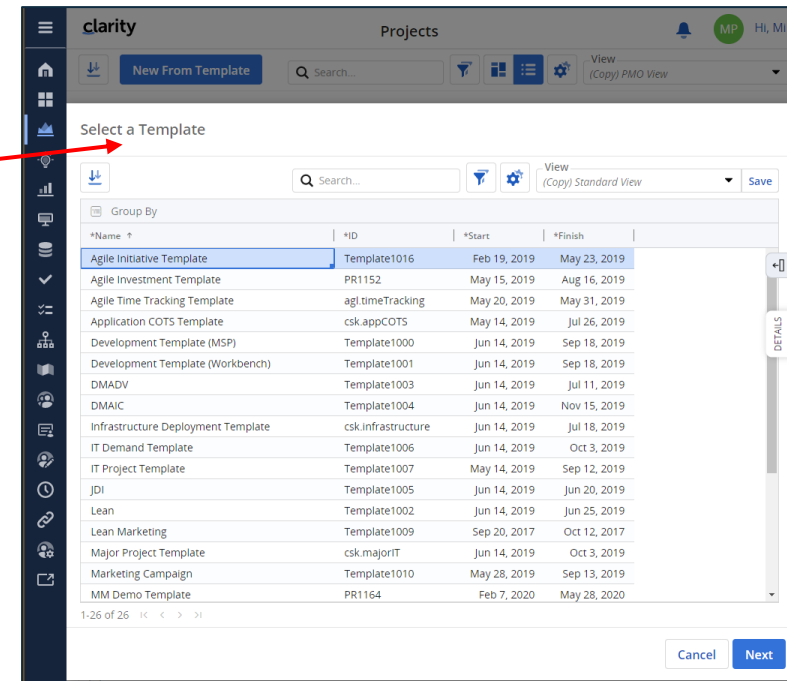
Inline Editing and Date Shifts

Project Management Enhancements – Creation

Project creation security rights have been updated in this release: Project – Create and Create from Template and Project – Create from Template. When creating a project from a template in the Modern UX, the templates are now displayed using a project grid.



Template Grid



Project Management Enhancements – Blueprint Enhancements

Blueprints now have the ability to have a Baselines Module added along with using Business Rules to make specific fields required.

Baseline Module

clarity

[← Project](#)

A Collaboration Initiative

PR1095

On Track

MP

Properties

Baselines

Dashboard

Tasks

Links

Agile Perform...

Rally

Risks

View
(Copy) Standard View

Select All

Deselect All

Group By

*Revision Name	Current Revis... ↓	Start	Finish	Usage	BAC
<input type="checkbox"/> Initial Baseline	✓	Apr 15, 2019	Aug 31, 2022	0	167,440

Selective Required Attributes

New Rule

Rule Name *

Required Attributes

Description

Enter the rule description

Conditions

☒ Always True

Actions

Required Attributes

Add Attributes...

Alignment × Architectural Fit × As Of × Assignment Category ×

Ideas and Custom Investment Types Enhancements



Idea/Custom Investment Type Enhancements – Status Reports

Idea and Custom Investment Types can now add the Status Report (grid) module to their Blueprints.

clarity

← Idea

Inactive

A Fantabulous Project
IBT1027

MP

Hi, Mike ▾

LinksPropertiesRisksIssuesChangesStaffFinancialsStatus

↓

Q Search...

View
Standard View ▾

Save

Select All Deselect All

Group By

*Name	Report D... ▾	Report Status	Schedule Status	Scope Status	Cost And Effort Sta...	Overall Stat...
<input type="checkbox"/> Week 3	Aug 19, 2021	Draft	On Track	On Track	Needs Help	40
<input type="checkbox"/> Week 2	Aug 13, 2021	Final	On Track	Needs Help	At Risk	60
<input type="checkbox"/> Week 1	Aug 6, 2021	Final	At Risk	At Risk	At Risk	90

DETAILS

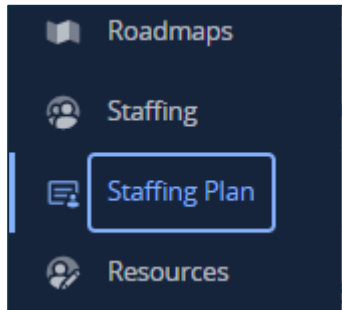
Resource Management Enhancements



Resource Management Enhancements – Staffing Plan

The Modern UX staffing page prior to 15.9.3 has been renamed to “Staffing Plan”. This staffing page has been updated with a pop-up confirmation message when a user is trying to delete a resources total allocations from an investment.

Renamed Staffing Plan Page



Allocation Deletion Confirmation Message

Home

Grid

Chart

Lightbulb

Bar Chart

Monitor

Database

Back

Current Time Period

Allocation

Hard Allocation

Resources Investments

Search or filter...

	2021-08 ALLOCATION	2021-09 ALLOCATION	2021-10 ALLOCATION	2021-11 ALLOCATION	2021-12 ALLOCATION	TOTALS ALLOCATION
<div><div>x</div><div>PINNED (0)</div><div>ALL</div></div>	354.38	315.11	212.70	195.64		
<div><div>▼</div><div>Aaron Bennett</div><div><div></div><div>+</div></div></div>	1.45	2.00	1.73	1.00		
<div><div></div><div>AARD Payments Modules</div><div><div></div><div>⌚</div></div></div>				0.00		
<div><div></div><div>Anesthesia Delivery</div><div><div>x</div></div></div>						
<div><div></div><div>Rollout Example Project</div><div><div>x</div></div></div>				1.00		
<div><div>></div><div>AB Team</div><div><div></div></div></div>	148.00	148.00	77.52	74.00		
<div><div>></div><div>Adam Benning</div><div><div></div></div></div>	1.00	1.00	1.00	1.00		

Are you sure you want to delete this allocation?

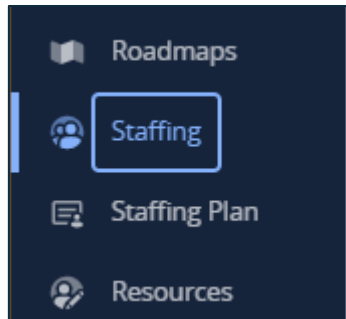
Cancel

Confirm

Resource Management Enhancements – Staffing (*New)

The new Staffing page provides users with greater staffing flexibility and insight in one place with the use of the common grid. Users can see staff plans from multiple investments and configure them with filters and fields across those objects. (Projects, Ideas, Custom Investments, Team, and Resource)

Staffing Page



Staffing													
clarity													
Per-Period Metrics - 12 Periods													
View (Copy) Standard View													
Remove All Match All Match Any													
Add Filter Allocation > 0													
Select All Deselect All													
Name													
Staffing Common Investment													
Group	*Resource	Role	*Booking Status	Name	Type	Start	Finish	Allocation	Actuals	Allocation	Actuals	Allocation	Actuals
A Collaboration Initiative								11.35	0.00	12.35	0.00	12.35	0.00
Davis, Drew Developer Hard A Collaboration Ini...								0.00	0.00	0.00	0.00	0.00	0.00
America, Capt... Developer Hard A Collaboration Ini...								0.00	0.00	0.00	0.00	0.00	0.00
Fleming, Nicole Project Manager - ... Soft A Collaboration Ini...								0.40	0.00	0.40	0.00	0.40	0.00
Joseph, Derrick Resource Manager Soft A Collaboration Ini...								0.95	0.00	0.95	0.00	0.95	0.00
Robertson, Th... Sr. Project Manager Mixed A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Sumner, Sara Shopping Team Soft A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Clark, Leigh Systems Analyst Soft A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Robinson, Brian Business Analyst Soft A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Coleman, Joyce Architect Soft A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Paxton, Robyn Test Engineer Soft A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Johnson, Susan Portfolio Manager Soft A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Lewis, Dana Project Manager - ... Mixed A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Research - En... Research - Engineer Soft A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Phillips, Peter Business Analyst Soft A Collaboration Ini...								1.00	0.00	1.00	0.00	1.00	0.00
Kingsley, Art Architect Mixed A Collaboration Ini...								0.00	0.00	1.00	0.00	1.00	0.00
Avengers Team Soft A Collaboration Ini...								0.00	0.00	0.00	0.00	0.00	0.00
A Finance Process Change								0.00	0.00	0.00	0.00	0.00	0.00
A Mobile App for Snack Orders								0.00	0.00	0.00	0.00	0.00	0.00
A New Product Launch								0.00	0.00	0.00	0.00	0.00	0.00
A New Report that targets analysis								13.00	0.00	13.00	0.00	13.00	0.00
A Portfolio Initiative								0.00	0.00	0.00	0.00	0.00	0.00
AARD Payments Modules								0.00	0.00	0.00	0.00	0.00	0.00

Search...													
Staffing													
Common Investment													
Resource													
Applications													
Audits													
Idea													
Product													
Project													
Release													
Created By													
Created Date													
Last Updated By													
Last Updated Date													
Story													
Totals													
Actuals													
Allocation													
ETC													
Hard Allocation													
Remaining Allocation													
Remaining Availability													
Total Usage													

Hierarchy Enhancements



Hierarchy Enhancements – Parent Association and Auto-Import

There is a new “Parent” field located on the Investment Object. This field can be populated on Projects, Ideas, and Custom Investment Types. This list of possible parents are instances of Investments where the Master Object is checked as being able to be included in Hierarchies. Utilizing the Parent field, you can auto-import all of the children below a Hierarchy item to build out a Hierarchy in one click.

Parent Attribute

New From Template

Select All Deselect All

Group By

+ *Name

Web Based Trading

AARD Payments Modules

Change Mgt for Internal Portal

Web Application Enhancement

CRM Contact Center Development

Email SAN Storage Implementation

eCommerce Portal

A New Report that targets analysis

Eclipse Enhancements

Eclipse Enhancements

Change Mgt for Online Order Entry

Online Order Entry

Xog Test

Product Launch Template

Agile Initiative Template

Trade Show

Parent 1 ↑

Host 2 sales-traini...

Service Line Expan...

Service Line Expan...

Service Line Expan...

Lost Device Service

Each client service rep reviews 3 each month.

AS Services

Introduce Self Service Portal

Service Line Expansion

Modernize customer service portal

Client Services Datamart

Mobility Management Services

SDC ServiceNow / Clarity Integration

service

Region

North America

Asia X Japan

Blueprint

IT

A Corporate Blueprint

IT

IT

ID1021

OKR-0023

PL-003

PRB1007

PRG0004

PRS1013

PR1005

PR1032

PR1183

Idea

OKRs

Product

Project

Programs

Project

Project

Project

Project

Marketing Group

Auto-Import Children

clarity

Shopping Site shop

Investments Properties

← Import ↓

> Overview

Shopping Site

Investment ID PD-001

Import Children

Auto-Import Children

Delete

clarity

Shopping Site shop

Investments Properties

← Import ↓

> Overview

Shopping Site

Investment ID PD-001

Service Line Expansion

System Level Throughput

Site Strategy

Change Mgt for Internal Portal

Web Application Enhancement

AARD Payments Modules

Change Mgt for Online Order Entry

Online Order Entry

Eclipse Enhancements

A New Report that targets analysis

CRM Contact Center Development

eCommerce Portal

Email SAN Storage Implementation

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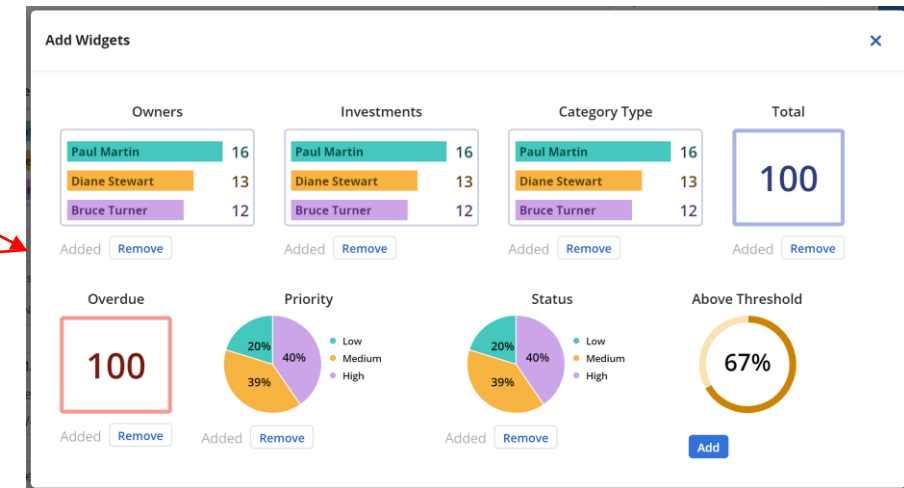
Hierarchy Enhancements – Aggregated Risks/Issues/Changes and Widgets

Hierarchies now can display all the Risks, Issues, and Changes associated to the Investments that are included in the Hierarchy. Their associated Modules can be added to the Hierarchy Blueprints. Users can add “Widgets” to those pages to see visual indicators about collection of RICs.

The screenshot shows the Clarity interface for a 'Shopping Site' hierarchy. The 'Risks' tab is active, displaying a table of risks and their associated investments. A red box highlights the 'Add Widgets' button in the top right corner of the interface.

Group	*Name	*Status	*Priority	Probability	Impact	*Name	*Investment ID
A New Report that targets analysis	Materials may co...	Open	High	High	Medium	A New Report tha...	PR1299
	Second Risk	Open	Low	Low	Low	A New Report that...	PR1299
	We may have thin...	Open	Medium	Low	Low	A New Report that...	PR1299
AARD Payments Modules	Reduced Funding ...	Open	Low	High	Low	AARD Payments M...	PR1151

Widgets



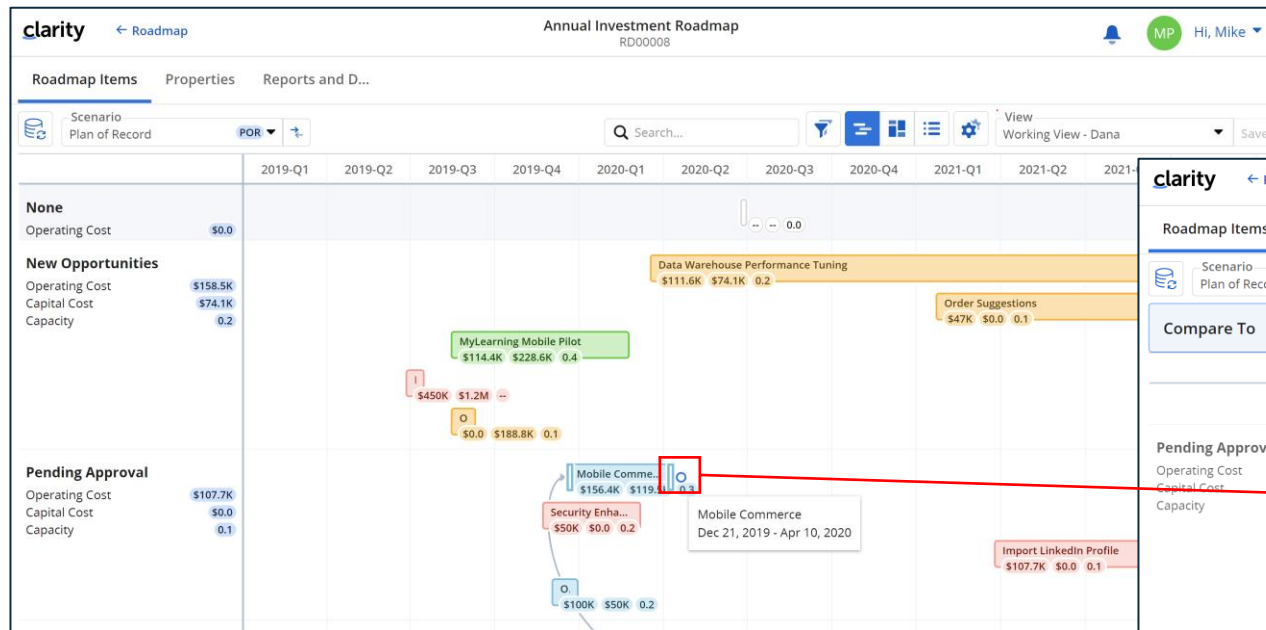
Roadmap Enhancements



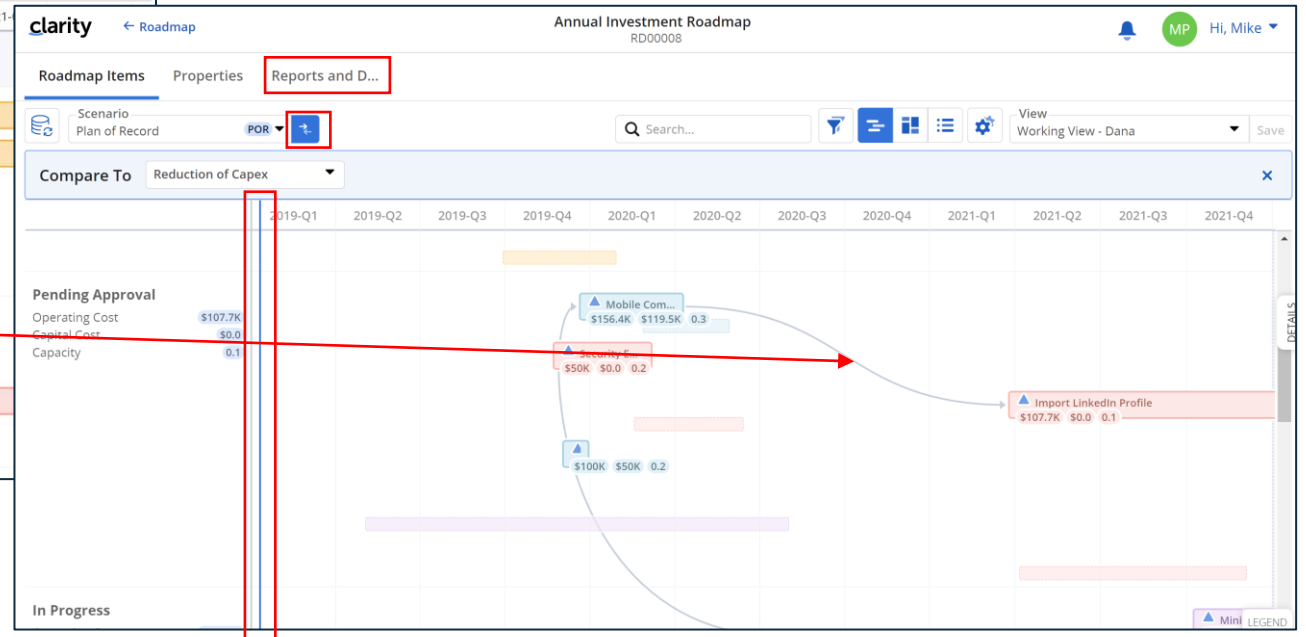
Roadmap Enhancements – Timeline

This release of Clarity saw a refactoring of the Roadmap Timeline to use the common timeline component. This refactoring brought an adjustable swimlane column, easier dependency drawing, and the return of scenario comparisons. (absent from 15.9.2) Roadmaps can also be configured with field level security and Channels can be added to Blueprints.

Refactored Timeline



Dependencies, Adjustable Column, Scenarios, and Channels



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- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCRs** button under the **Report PDUs**
- Click on **Report PDUs**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
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