



regoUniversity

NASHVILLE • 2022

Latest Clarity Release
Value Overview
16.0.3

Your Guides:

Ross Hensel and Mike Pokorny

Agenda

- Introductions
- Roadmap Enhancements
- Checklists and To-Dos
- Project and CIT List Enhancements
- Sub-Object Enhancements
- Customer Requests
- And More!

Introductions



Introductions

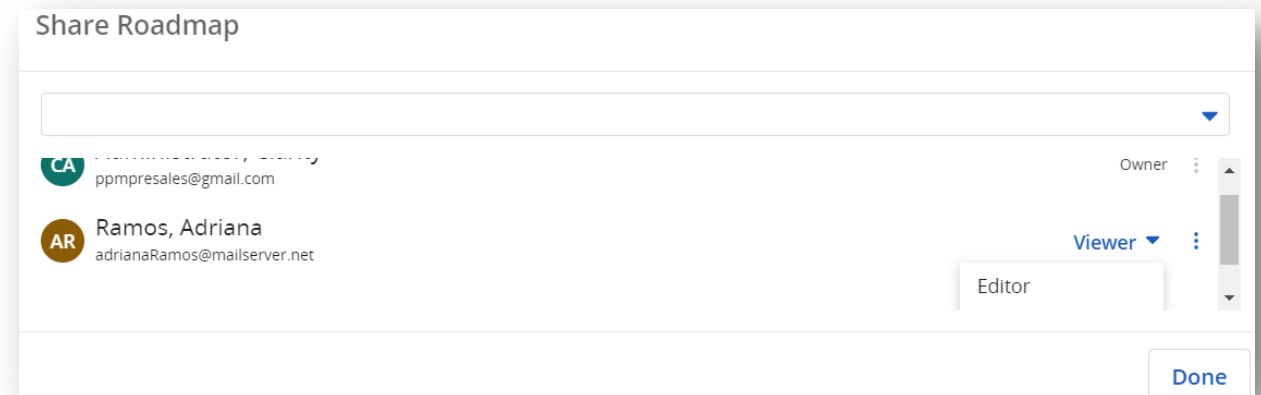
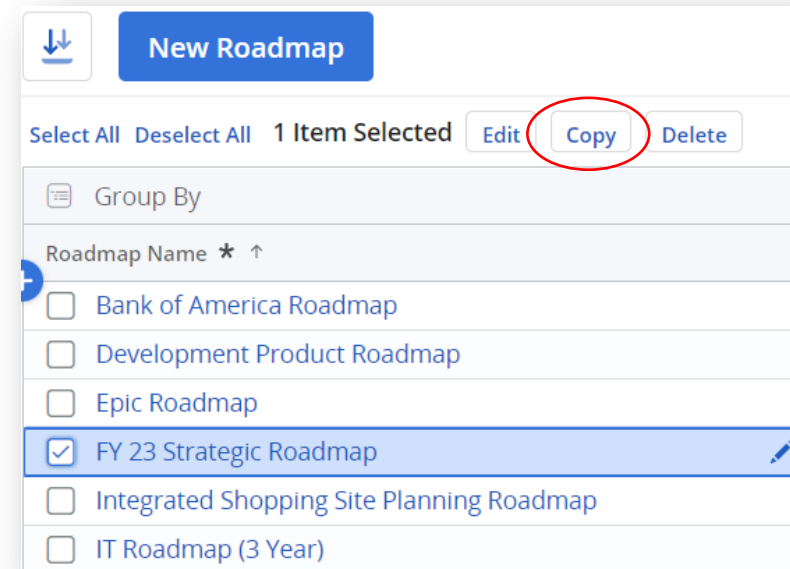
- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

Roadmap Enhancements



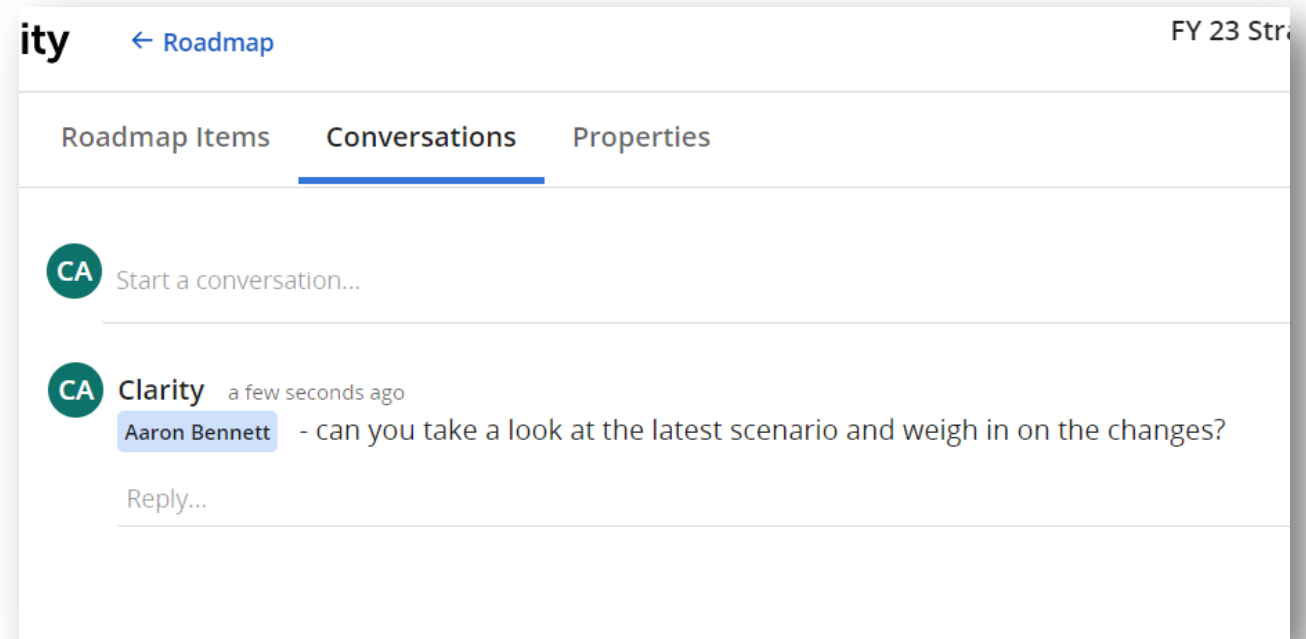
Copy and Share Roadmaps with Users

- No need to start from scratch anymore as you can now copy Roadmaps to start with a solid foundation.
- As the owner of a Roadmap, you can decide on which users you want to share the Roadmap with. You can even decide if they have view or edit access to the Roadmap.



Collaborate on Roadmaps with Conversations

- Work and collaborate with other users about your Roadmap with the ability to use Conversations
 - Tag other Clarity users
 - Inline replies
 - Upload files
- The Conversation module can be added to the Roadmap blueprint

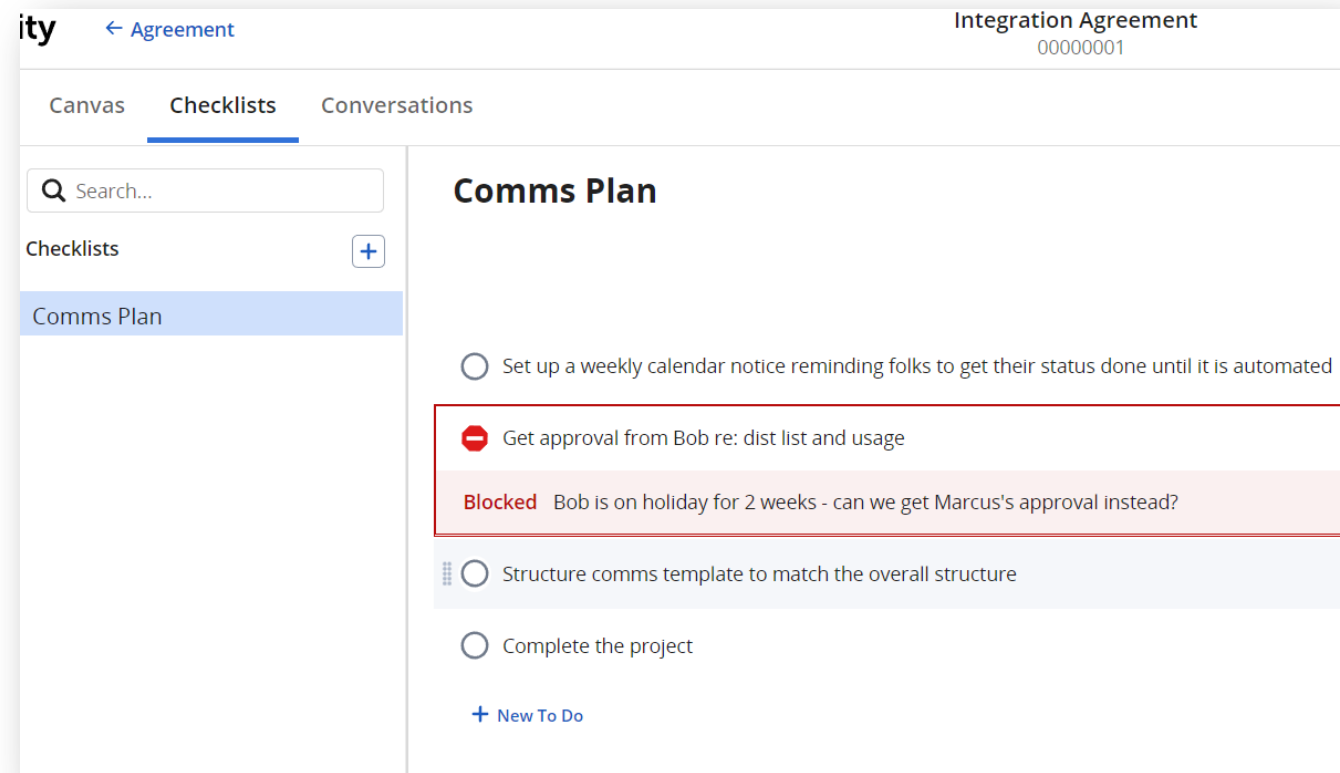


Checklists and To-Dos



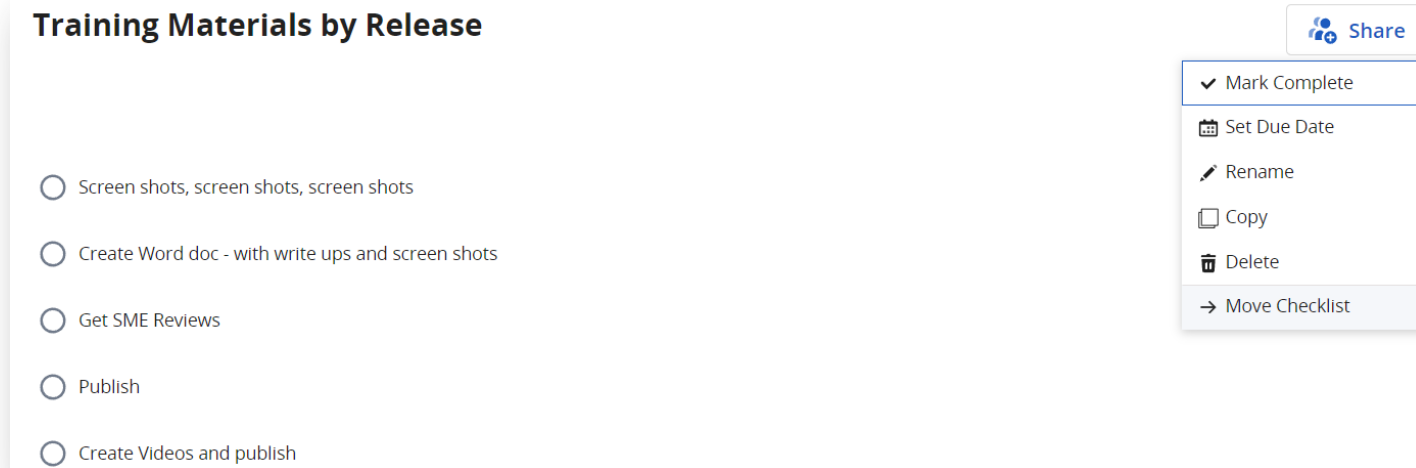
Define Work that Needs to be Done on Agreements

- Agreements now support Checklists
- Define To-Dos on the Checklists
- Associate Users and Due Dates
- Mark as Blocked with Blocked Reasons
- Streamlining what needs to get done to better support dependencies



More Power in Checklists from My Workspace

- Ability to move and remove Checklists in and out of Investments they were created
- Provides additional power and control with your collaborative work



Improved Visuals for Smartlists

- New ways to visualize your Smartlists and associated Tasks
- Additional Board and Calendar layouts have been added in the My Workspace area

The image displays two views of the 'My To Dos' interface. The top view is a list view with three columns: 'Blocked (1)', 'Open (98)', and 'Completed (62)'. The 'Blocked' column contains one task: 'Get approval from Bob re: dist list and usage' with a sub-note 'Comms Plan (Integration Agreement)' and a 'Blocked' status. The 'Open' column contains two tasks: 'All applications are entered into CA PPM' and 'Risk evaluation is current for all applications', both with sub-notes 'Application Rationalization Complete (Modern Cloud Migration)' and due dates of 'Nov 06' and 'Nov 27' respectively. The 'Completed' column contains two tasks: 'Review the Value Quadrant and Value Map in CA PPM' and 'Technical and Business values are current for all applications', both with sub-notes 'Application Rationalization Complete (Modern Cloud Migration)' and due dates of 'Nov 14' and 'Nov 14' respectively.

The bottom view is a calendar view for August 2022. It shows a grid of days from Monday to Friday. Tasks are scheduled as follows:

- Tuesday, August 2: 'Order the main give awa'
- Wednesday, August 10: 'Identify all data collector'
- Friday, August 12: 'BA Sign contract with rental'
- Friday, August 19: 'GB Get financials in'
- Thursday, August 25: 'DF Do something else'
- Friday, August 26: 'Figure out an investment'

See All of Your To Dos in One Place

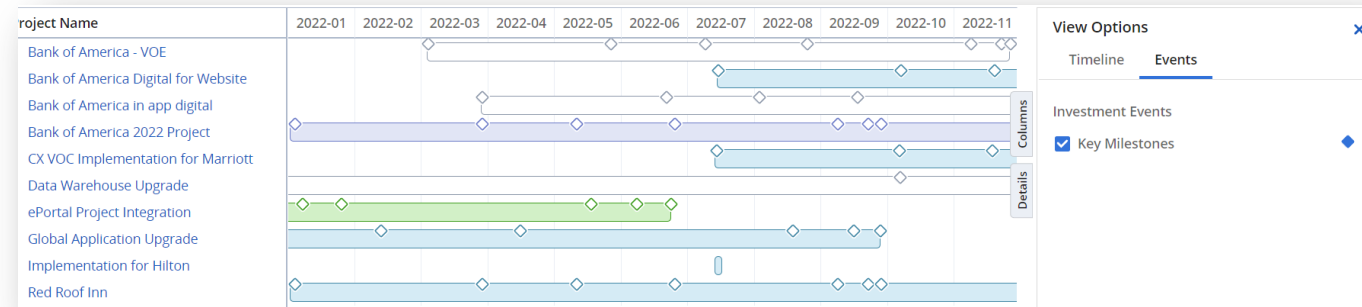
- There is now an “All” view for To Dos
- Consolidates all of your To Dos, across personal and investment work, in a single space

The screenshot displays the 'All' view for To Dos. The navigation bar includes 'All' (selected), 'Investments', 'Tasks', 'Risks', 'Issues', and 'Changes'. Below the navigation bar are three summary cards: 'ToDos by Owner' with a bar chart showing counts for 'None' (95), 'Baker, Jesse' (10), and 'Allen, Timothy' (5); 'Blocked Items' with a green box containing the number '1'; and 'Past Due' with a green circle containing '100%'. Below these cards are 'Select All' and 'Deselect All' buttons, a 'Group By' dropdown, and a table of To Dos with columns for 'Com...', 'Name *', 'Owner', and 'Due Date'.

Com...	Name *	Owner	Due Date
<input type="checkbox"/>	Sign contract with rental vendor	Adams, Benjamin	Aug 12, 2022
<input type="checkbox"/>	Order the main give away	Danes, Dudley	Aug 2, 2022
<input type="checkbox"/>	Select rental company - try for one vendor		
<input type="checkbox"/>	Inform team that rental requests are closed		
<input type="checkbox"/>	Order the booth give aways		
<input type="checkbox"/>	Find the best deals for the give aways	Danes, Dudley	Sep 9, 2022
<input type="checkbox"/>	gather metrics		

Key Events on your Investment Timelines

- Key Events were first introduced in the Roadmap space
- Add Events to your Project and Custom Investments on the Timeline Layout
 - Currently supports Key Milestones



Enhanced Project Task Reporting

- Task Timelines can now be exported to PDF
- Easily report on your task WBS
- Define the size and orientation

The screenshot displays a project management application with a Gantt chart and a task list. An 'Actions' menu is open over the Gantt chart, showing options: PPM Gantt, Microsoft Project Read Only, Microsoft Project Read-Write, **Export to PDF** (highlighted), Add Subprojects, Compare to Baseline, and Autoschedule. A 'Letter' dropdown menu is also open, showing a search bar and a list of options: Letter (checked), Legal, Tabloid, A4, HD Display (1920px), Laptop (1440px), Tablet (1024px), and Fit to Content. The Gantt chart shows a project timeline from July 2022 to May 2023, with various tasks represented by colored bars. The task list on the left includes columns for Name, Start, Finish, Status, Key Task, and Milestone, with tasks such as 'Project Kick-off', 'Define Scope', 'Identify Info.', 'Solution Design', 'User Interface', 'Quality Assurance', and 'Deployment Plan'.

Improved Staffing Workspace Editing

- The Staffing Workspace allows you to perform bulk edits on when performing Resource Management activities
- Includes the ability to bulk edit allocations

Allocations - Murphy, Carolyn

Name	2022-07	2022-08	2022-09
Clarity Enhancements	1	1	1
HR Compliance Training Content - EverFi	1	1	1
Linked In Learning	1	1	1
Manseau & Lanco App Standardizaion Assessment			
Reporting Renovation (Power BI)	0	0	0
Workday Role Based Security Provisioning	0	0	0
Total	3	3	3
Availability	1	1	1
Remaining	(2)	(2)	(2)

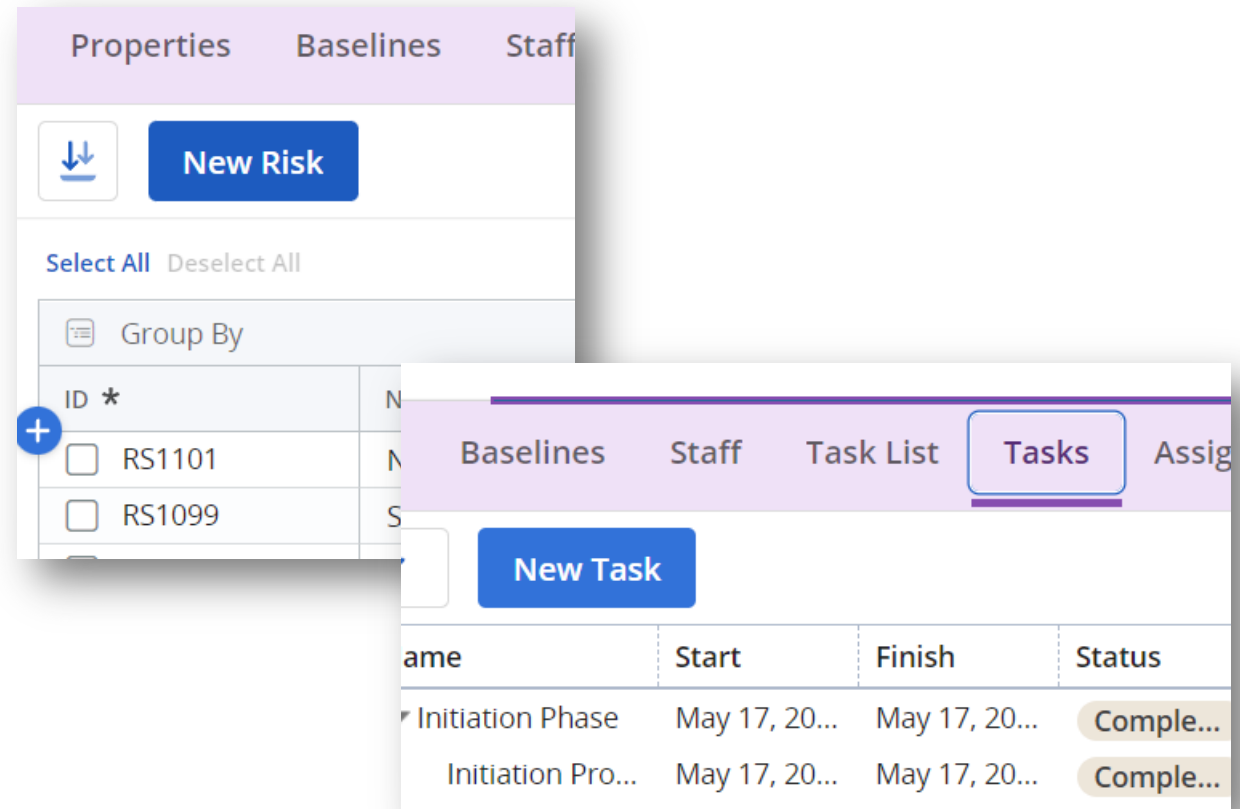
Cancel Save

Sub-Object Enhancements



Improved Sub-Object Creation

- Previously, Sub-Object records needed to be created using the grid
- Records can now be created using a creation screen/form
 - **Projects:** Tasks, Risks, Issues, Changes, Status, Baselines, and Custom Subs
 - **Ideas:** Risks, Issues, Changes, Status, and Custom Subs
 - **Custom Investments:** Tasks, Risks, Issues, Changes, Status, and Custom Subs



Customer Requests



Administrators Can Edit Users (Beta)

- User management needed to be performed under the Classic PPM Administration menu
- We can change certain properties about user records like status, email, and assigned security groups

The screenshot shows the 'Users' management page in the Clarity application. The page title is 'Users' and it includes a search bar and a 'View' dropdown set to '(Copy) Standard View'. A table lists user records with columns for Last Name, First Name, User Name, Resource ID, Email Address, Secondary Email, Status, Locale, Language, and User Groups. A dropdown menu is open over the 'User Groups' column for the first user, Karl Abbott, showing a search bar and several options, including 'Basic group for user access', 'Checklist Sharing', and 'Modern UX TM'.

Last Name *	First Name *	User Name *	Resource ID *	Email Address *	Secondary Email...	Status *	Locale *	Language *	User Groups
Abbott	Karl	karl	karlAbbott	karlabbott@mails...		Active	English(United Sta...	English	Basic group for user acc
Adams	Benjamin	benjaminAdams	benjaminAdams	benjaminAdams@...		Active	English(United S		
Admin	Rego	admin2	admin2	no@mail.com		Active	English(United S		
Administrator	NPD	npd_admin	npd_admin	noemail		Active	English(United S		
Agile	Andre	aagile	andreAgile	andre.agile@comp...		Active	English(United S		
Allen	Timothy	Demo	timothyAllen	jacob.cancelliere@...		Active	English(United S		
Alvarez	Corine	corineAlvarez	corineAlvarez	corineAlvarez@ma...		Active	English(United S		
America	Captain	diane	diane@acme.com	diane@acme.com		Active	English(United S		
Amos	Cheryl	camos	cherylAmos	cherylAmos@mail...		Active	English(United S		
Anderson	Christopher	christopherAnders...	christopherAnders...	christopherAnders...		Active	English(United S		
Andrews	Jason	jasonAndrews	jasonAndrews	jasonAndrews@m...		Active	English(United S		
Angelo	Michael	michaelAngelo	michaelAngelo	michaelAngelo@m...		Active	English(United S		
Angus	Walt	walta	walta	walt.angus@mails...		Active	English(United S		
Armstrong	Rachel	rachelArmstrong	rachelArmstrong	rachelArmstrong@...		Active	English(United S		

Timesheet Settings Are Now Honored

- Timesheet options set in Classic PPM are now honored and display correctly in the Modern UX

The image shows a side-by-side comparison of settings and their effect in the user interface. On the left is the 'Default Time Entry Options' configuration panel, and on the right is a 'No Tasks' state with an 'Add Tasks' dropdown menu.

Default Time Entry Options:

- POPULATE TIME RANGE: 7
- USER VALUE 1 LOOKUP: Time Entry User Lookup field 1
- POPULATE ASSIGNED TASKS:
- COPY TIME ENTRIES FROM PREVIOUS TIMESHEET:
- (Include actuals from previous timesheet (except for incidents))
- DISPLAY UNIT: Hours
- DECIMAL PLACES: 2
- ALLOW POSTING OF FUTURE TIMESHEETS:

Annotations:

- This option enables the **Add Assigned Tasks** option in Add Tasks. (points to the first option in the dropdown)
- This option enables the **Copy Previous Timesheet** option in Add Tasks. (points to the second option in the dropdown)
- This option enables the **Copy Previous Timesheet (with time)** option in Add Tasks. (points to the third option in the dropdown)

No Tasks State:

Add tasks to work on your timesheet.

Add Tasks dropdown menu:

- + Add Assigned Tasks
- + Copy Previous Timesheet
- + Copy Previous Timesheet (with time)
- Q Select Tasks

Questions?



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- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- 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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Phone

888.813.0444



Email

info@regoconsulting.com



Website

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