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

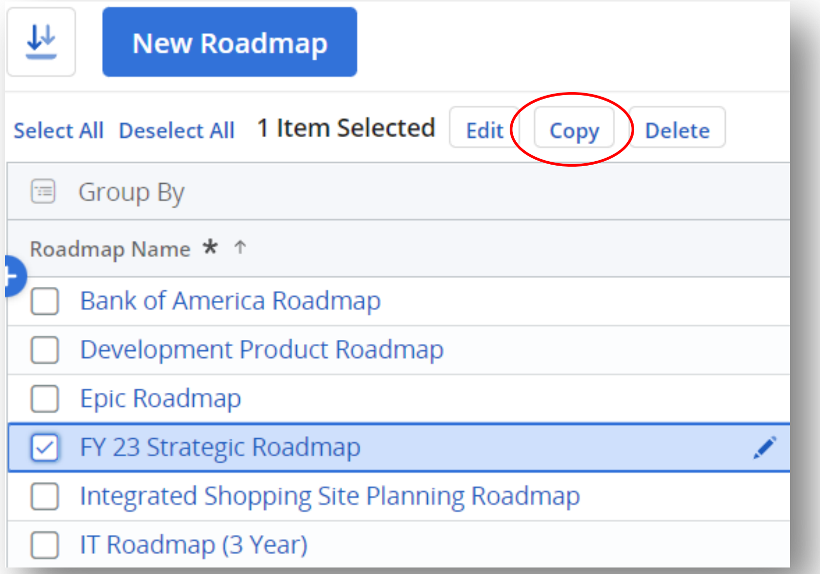
Introductions

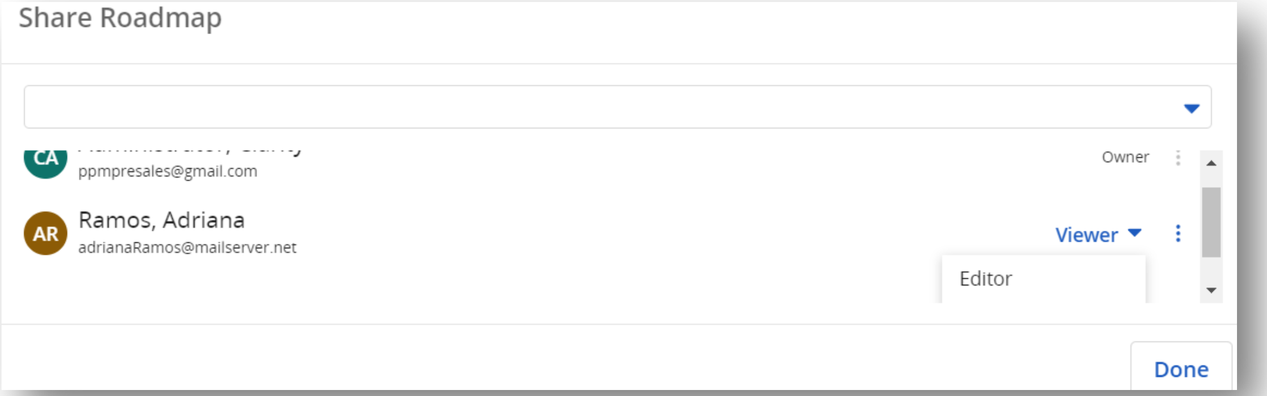
- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

Roadmap Enhancements

Copy and Share Roadmaps with Users

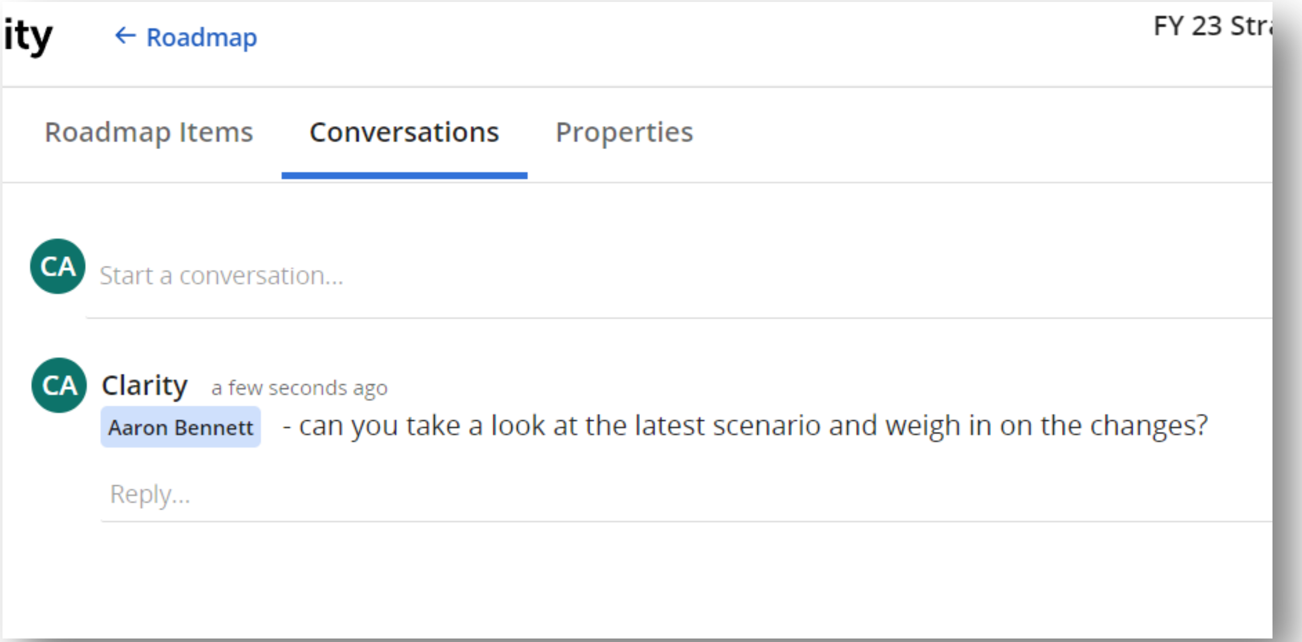
- No need to start from scratch anymore as you can now copy Roadmaps to start with a solid foundation.
- As the owner of a Roadmap, you can decide on which users you want to share the Roadmap with. You can even decide if they have view or edit access to the Roadmap.





Collaborate on Roadmaps with Conversations

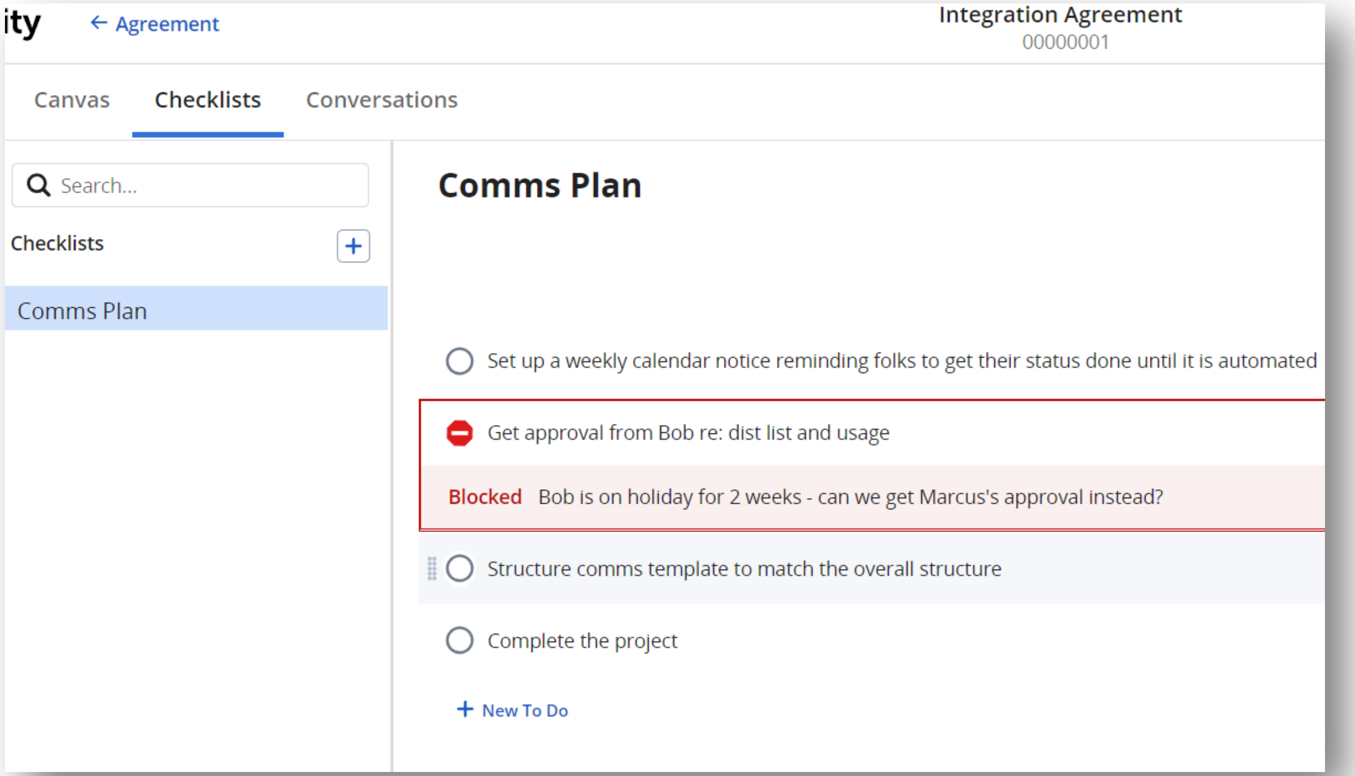
- Work and collaborate with other users about your Roadmap with the ability to use Conversations
  - Tag other Clarity users
  - Inline replies
  - Upload files
- The Conversation module can be added to the Roadmap blueprint



Checklists and To-Dos

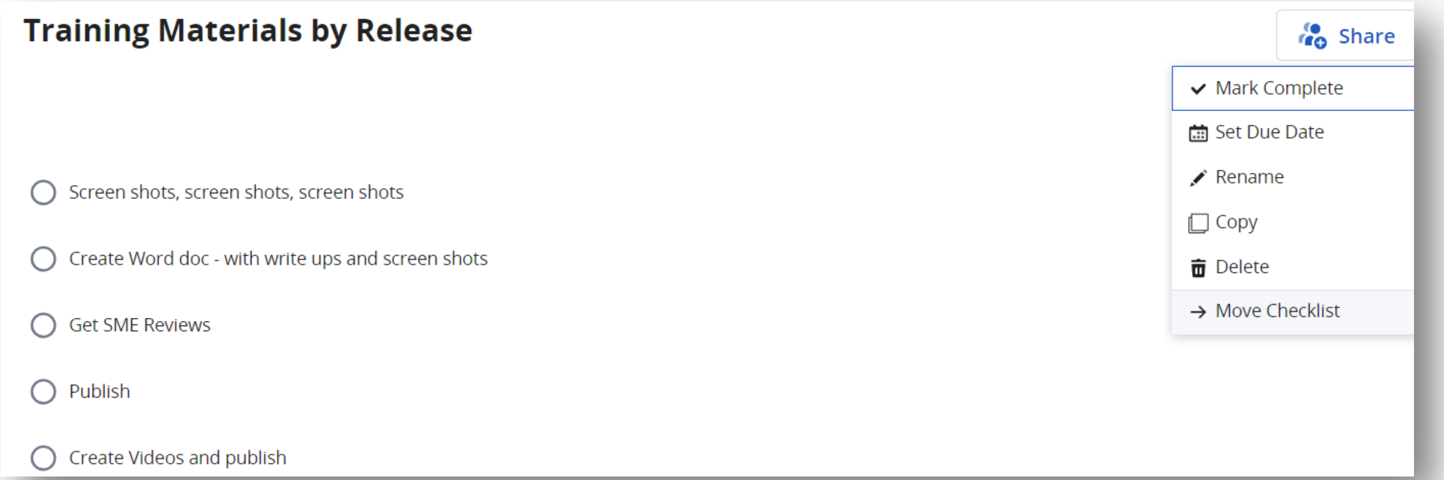
Define Work that Needs to be Done on Agreements

- 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



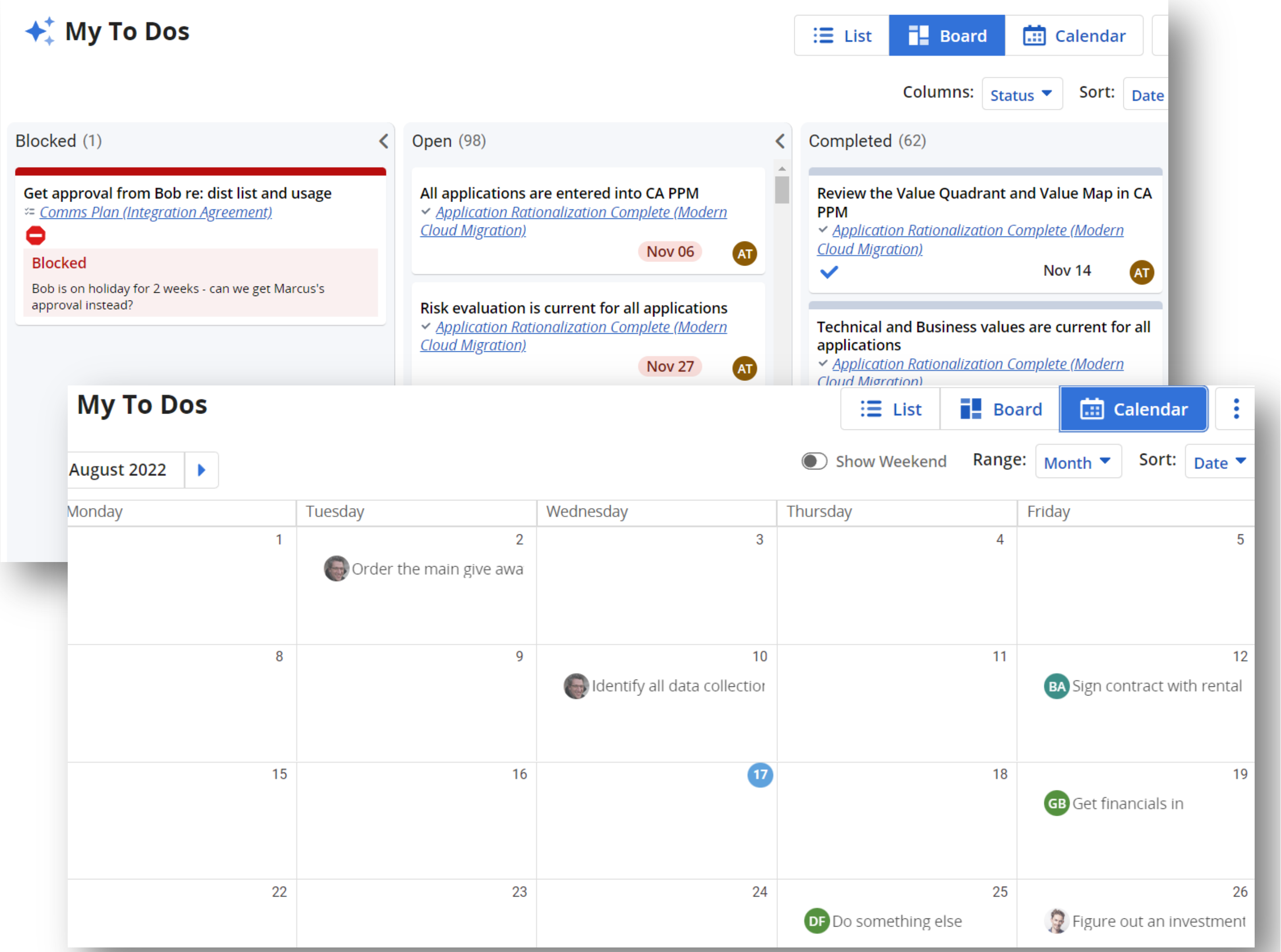
More Power in Checklists from My Workspace

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



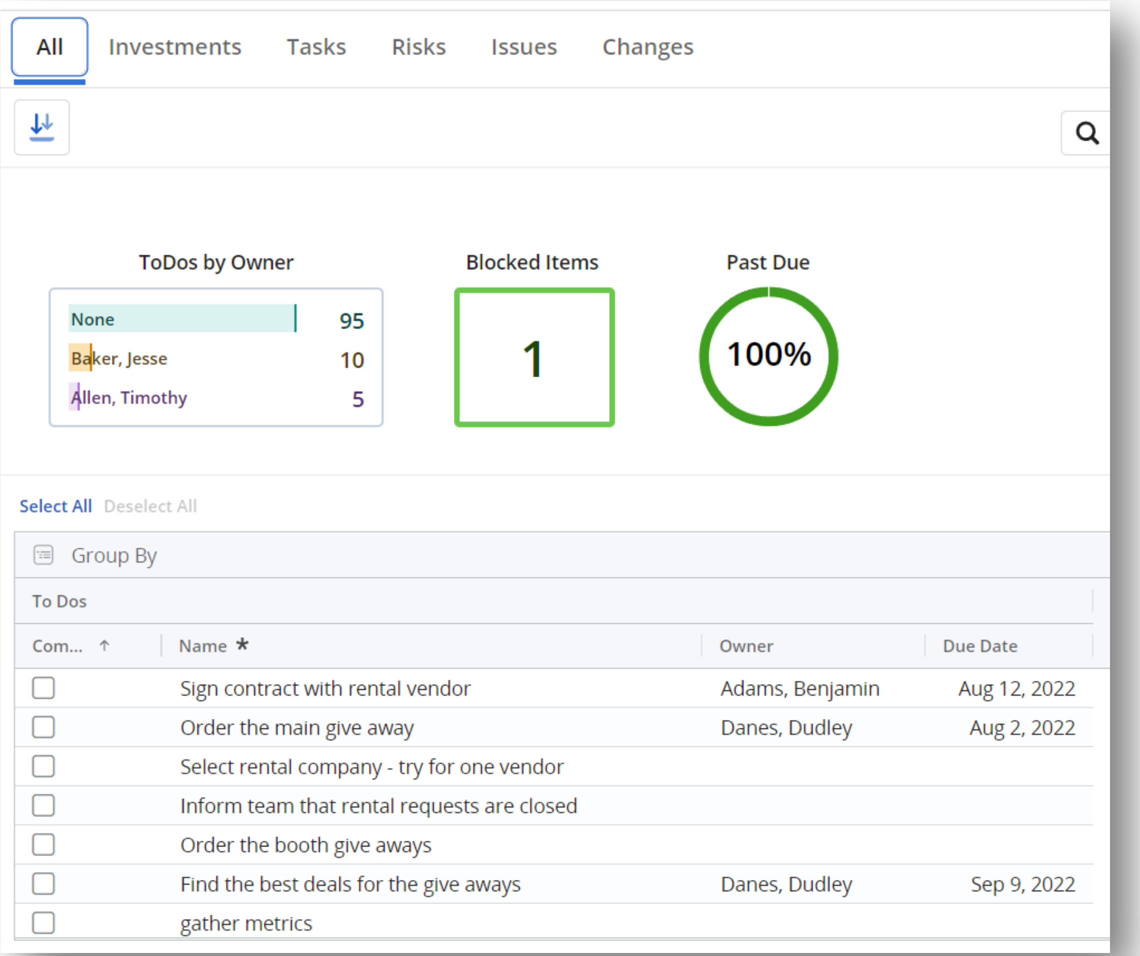
Improved Visuals for Smartlists

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



See All of Your To Dos in One Place

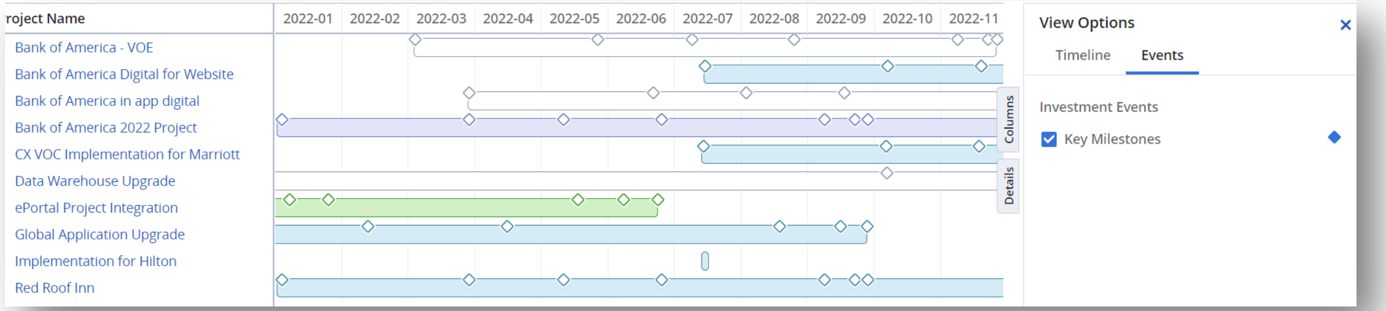
- There is now an "All" view for To Dos
- Consolidates all of your To Dos, across personal and investment work, in a single space



Project and CIT List Enhancements

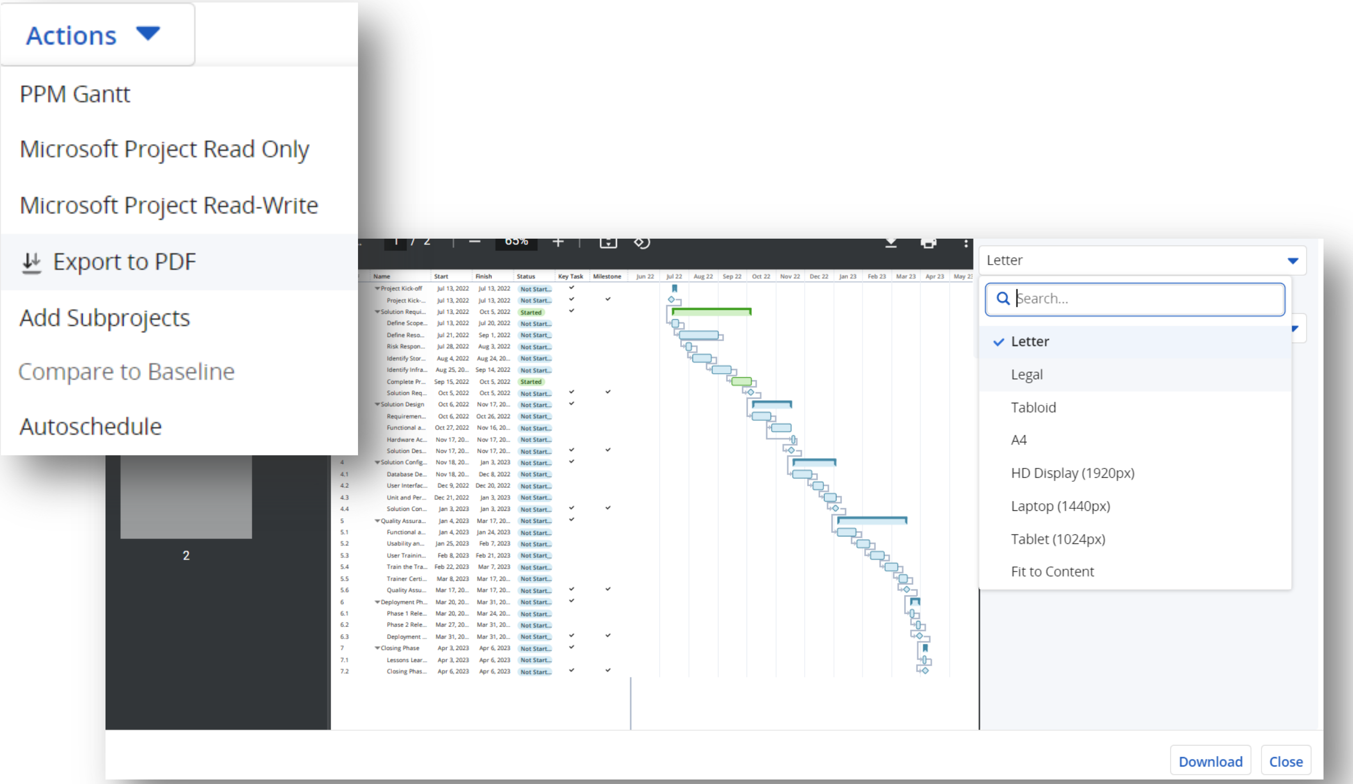
Key Events on your Investment Timelines

- 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

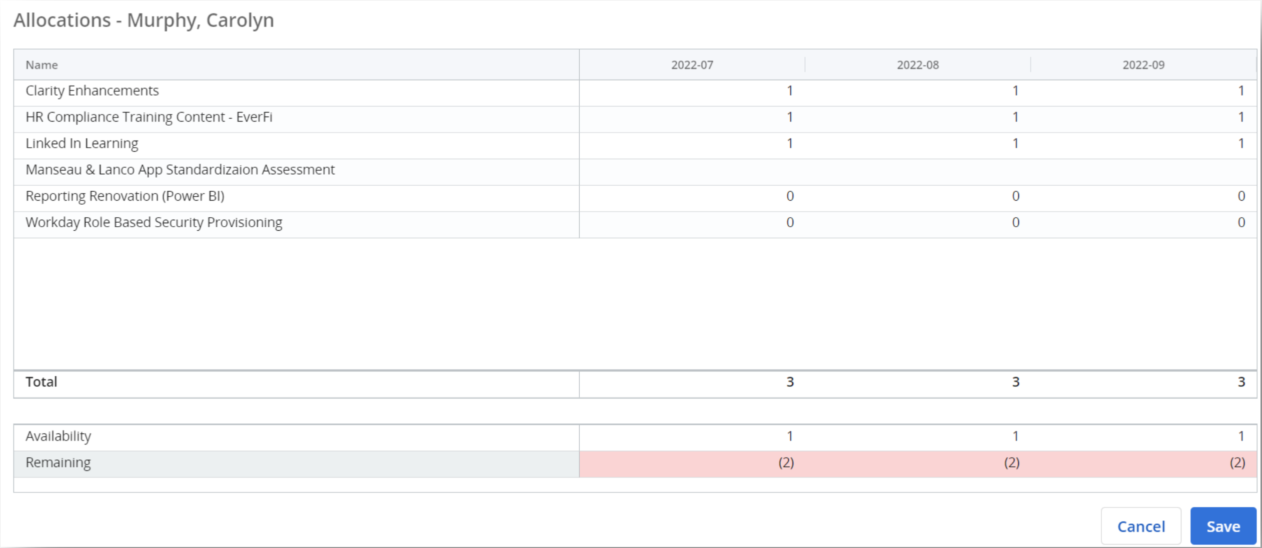
- Task Timelines can now be exported to PDF
- Easily report on your task WBS
- Define the size and orientation



Resource Management Enhancements

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

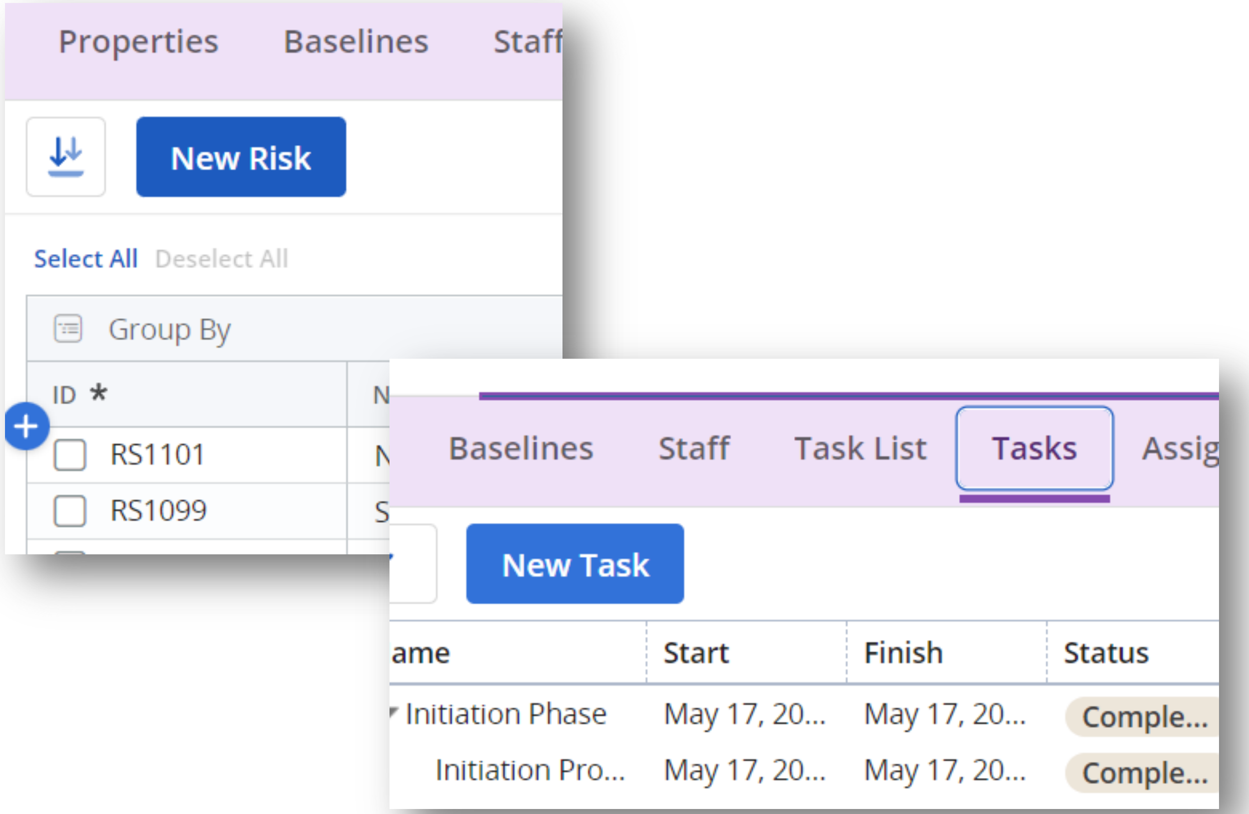

Allocations - Murphy, Carolyn

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)

Sub-Object Enhancements

Improved Sub-Object Creation

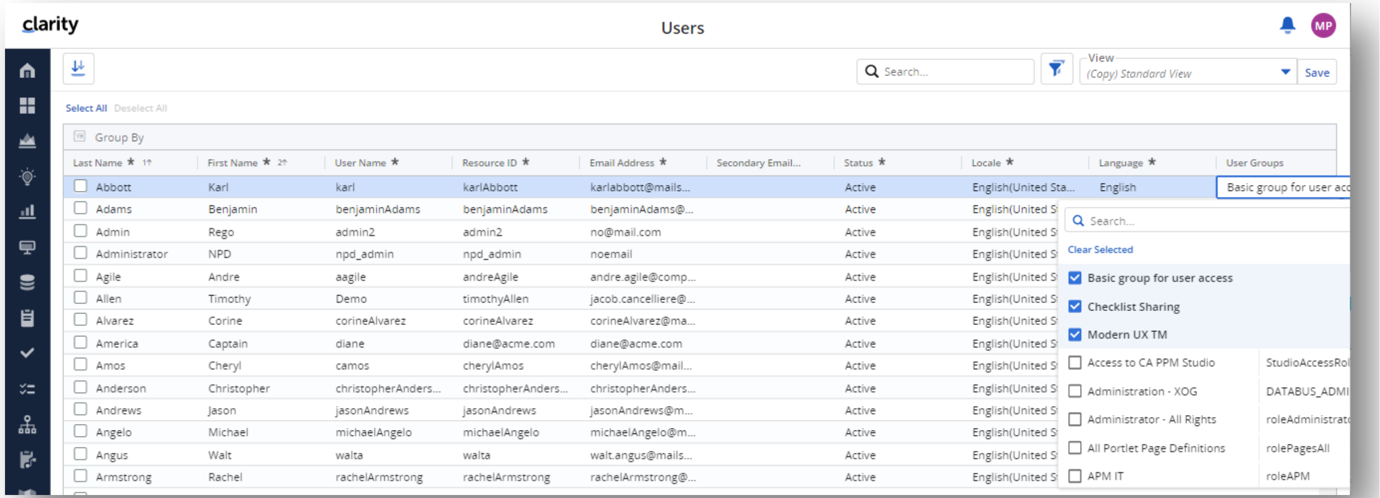
- Previously, Sub-Object records needed to be created using the grid
- Records can now be created using a creation screen/form
  - **Projects:** Tasks, Risks, Issues, Changes, Status, Baselines, and Custom Subs
  - **Ideas:** Risks, Issues, Changes, Status, and Custom Subs
  - **Custom Investments:**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



Customer Requests

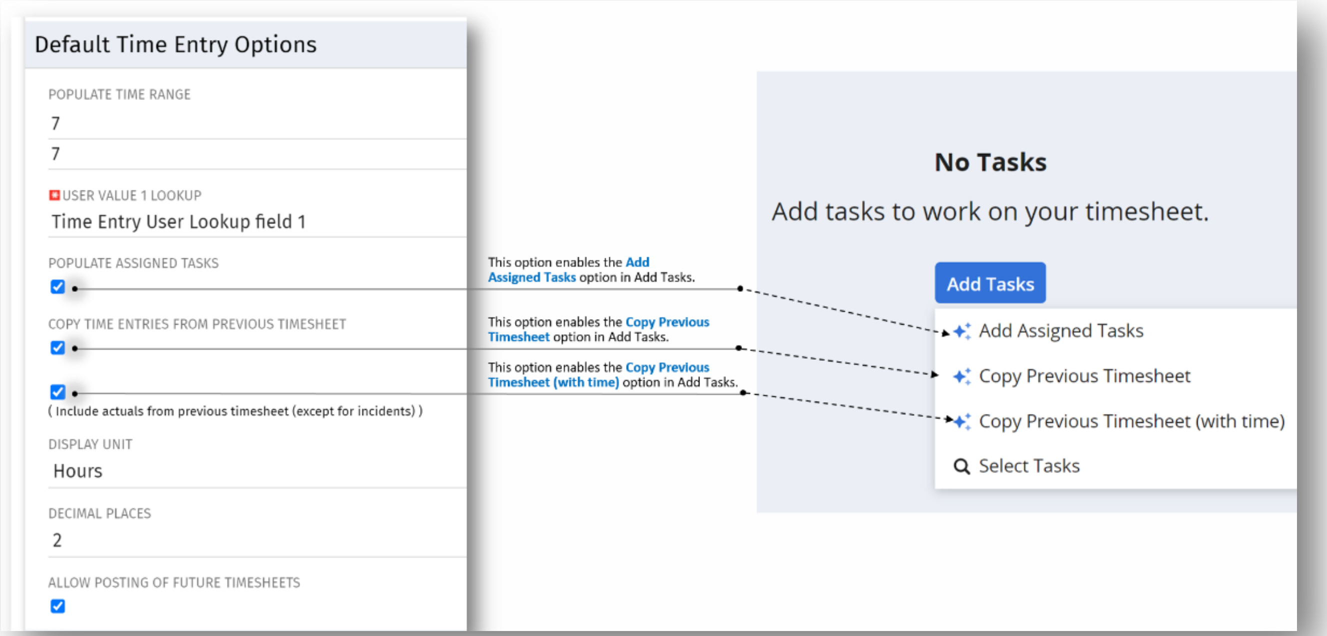
Administrators Can Edit Users (Beta)

- 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



Timesheet Settings Are Now Honored

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



And More!

Questions?

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- 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!
Don't forget to fill out the class survey.

Phone
888.813.0444

Email
info@regoconsulting.com

Website
www.regouniversity.com