regoUniversity

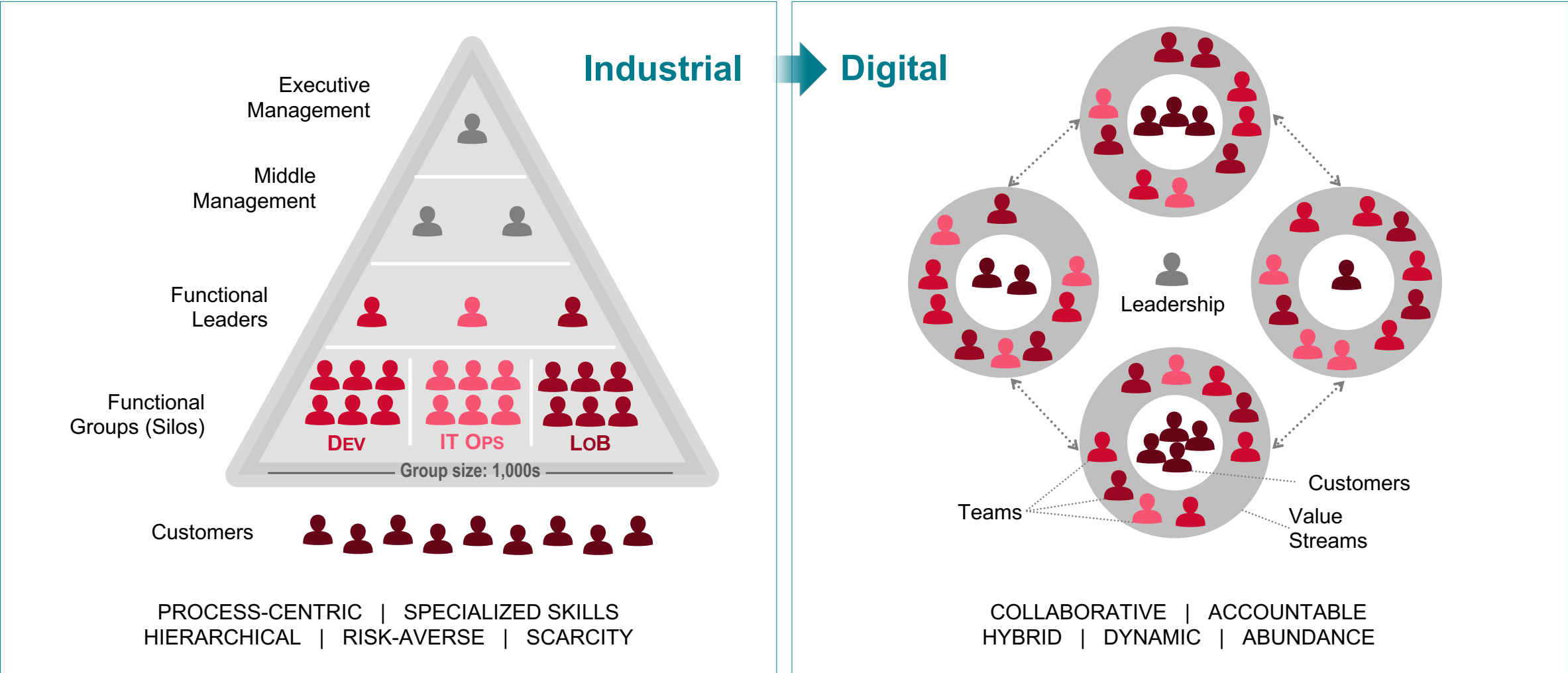## SAN DIEGO · 2023

Product Roadmaps

Your Guides:

Renu Motwani & Brian Nathanson

ValueOps

Innovation Requires an Agile Operating Model

Industrial → **Digital**

Executive Management

Middle Management

Functional Leaders

Functional Groups (Silos)

DEV   **IT OPS**   **LOB**

Group size: 1,000s

Customers

Leadership

Teams

Customers

Value Streams

PROCESS-CENTRIC | SPECIALIZED SKILLS
HIERARCHICAL | RISK-AVERSE | SCARCITY

COLLABORATIVE | ACCOUNTABLE
HYBRID | DYNAMIC | ABUNDANCE

WORK-CENTRIC

PEOPLE-CENTRIC

ValueOps
by Broadcom

The Current State of Digital Transformation

Millions Lost to Lack of Visibility, Alignment and Efficiency

ValueOps: Streamlined Digital Transformation

Aligns Business and Delivery to Create Maximum Customer Value

Clarity™
by Broadcom

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

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

Rally®
by Broadcom

Value Stream Organization
New Ways of Working

Value created

C-Suite
Executives
Portfolio Managers

Right thing built

Product Managers
Resource Managers
Architects

Works well

Product Owners
Delivery Leaders
Developers

Prioritization — People — OKRs

Backlog — Balancing — Planning

Sprints — Pipeline — Delivery

Metrics / Insights

Visibility

Alignment

Efficiency

JIRA
Tricentis
Microsoft
GitLab
salesforce
ZEPHYR
Bitbucket
GitHub
Trello
digital.ai
servicenow
MICRO FOCUS
IBM
bmc
aras
WhiteHat SECURITY
MODERN Requirements
SMARTBEAR
Gerrit
storyteller
SPARX SYSTEMS
iRise
jama connect
zendesk
Bugzilla
blueprint

ValueOps™
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ValueOps | The Only Solution to Provide End-to-End Value Stream Management

CREATE ALIGNMENT

- Align Business and Delivery
- Reduce friction by organizing around OKRs
- Foster collaboration from ideas to outcomes

INCREASE VISIBILITY

- Enhance decision making across the entire portfolio
- Improve trust by removing organizational silos
- Minimize risk

OPTIMIZE EFFICIENCY

- Accelerate transformation
- Improve productivity
- Drive continuous improvement

The most secure SaaS VSM Platform – the only FedRAMP-authorized solution for value stream management

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Rally

Stay Engaged with Us

- Join our [user community](#)

- Reach out to us with questions:

  rally.product@broadcom.com

- Engage with us at our **Rally Office Hours**

  every Thursday 12 PM EST visit

  [learn.broadcom.com/rally-office-hours](#)

- Sign up for our Newsletter

Rally Software ⚙ Settings

Community Home | Discussion 16.6K | Library 488 | Blogs 33 | Events 1 | Members 426

Welcome to the Rally Software Community!

This is where Rally Software users and product experts connect to share questions, ideas and feedback. Here you will find the right people and tools to help you with every stage of your Rally Software journey, whether you are just getting started, need help, or want to make the most of your Rally Software investment. We're glad you've joined us!

Just Released — New features or fixed defects to help your teams keep moving.

Ask the Community — Use the above search bar - or just ask your question here!

Share Know-How — Want to share how you solved a problem? Please do!

Create a Case — Get help from our amazing support team here.
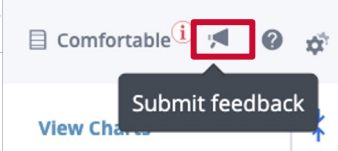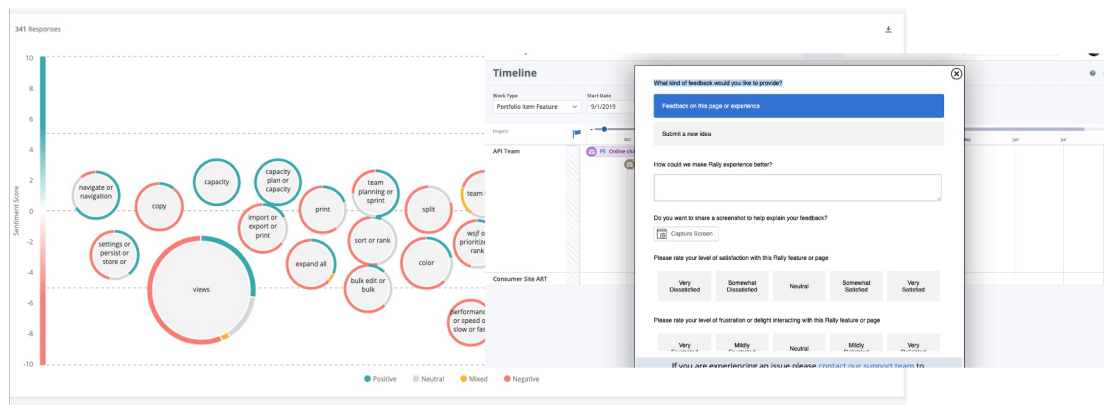
Help | Incidents | Events | Webcasts | Blog | Knowledge Base | Tutorials

- Submit feedback from the app

- Your feedback helps us make a better experience for all customers

- All feedback is reviewed and analyzed us to help us identify trends and areas of opportunity

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Roadmap Overview

Simpler & Scalable Agile

- Holistic planning and tracking experience
- Unified experience across functionality
- Customizable, data powered views

Insightful Value Stream Management

- Seamless tracking of deliverables starting from the core- business investments
- Rich analytics and reporting of flow metrics

Unified DevOps

- Bridging Business and Engineering Preferences by - integration with toolsets such as Jira, Azure DevOps, Confluence
- Data Consistency Across the Enterprise - by Integrations with DevOps toolsets such as GitHub, GitLab, Jenkins
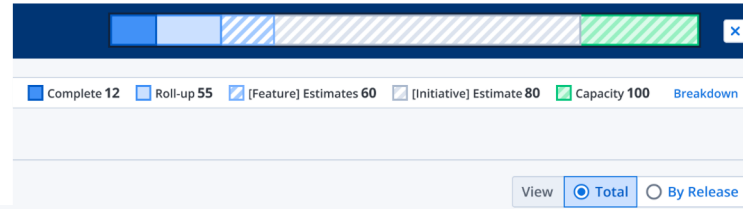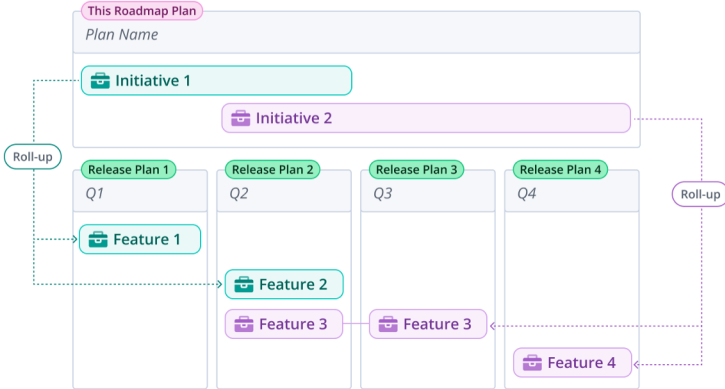
Modern, Secure Platform

- Flexible Administration
- FedRAMP Parity and Compliance
- Continued 508 Compliance

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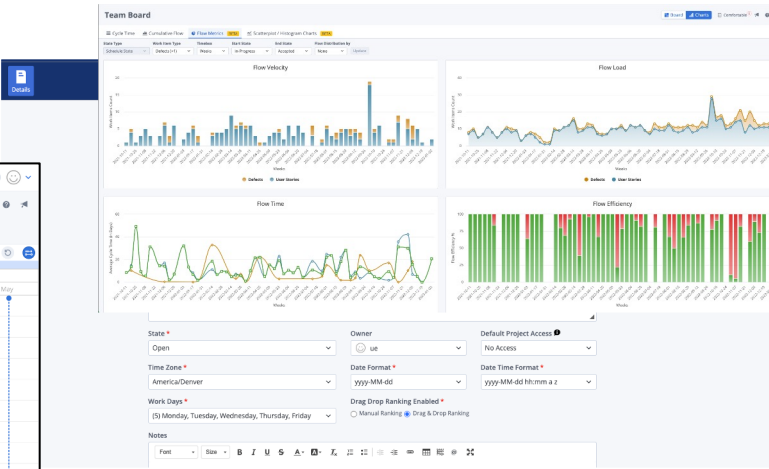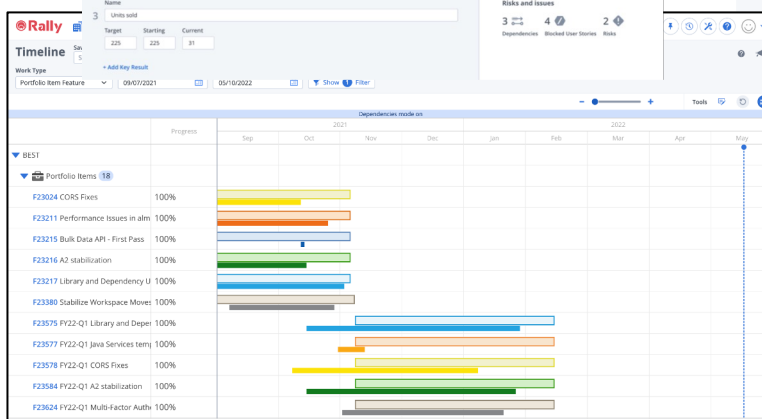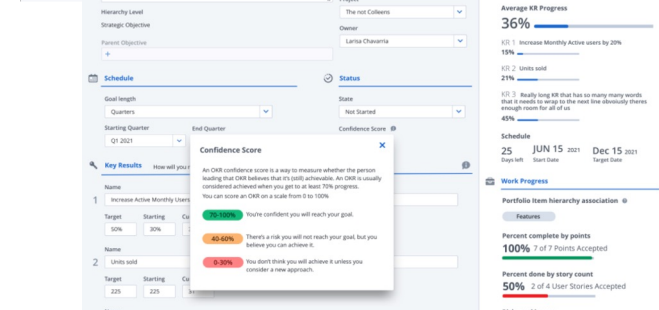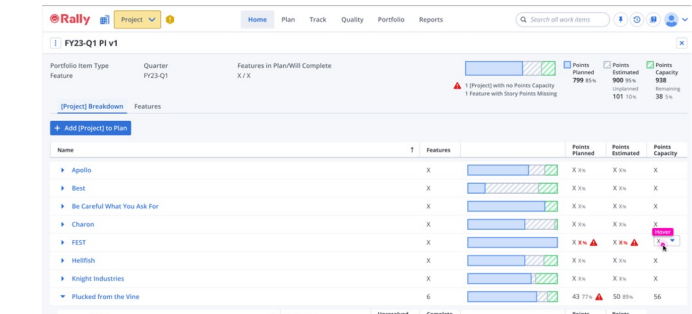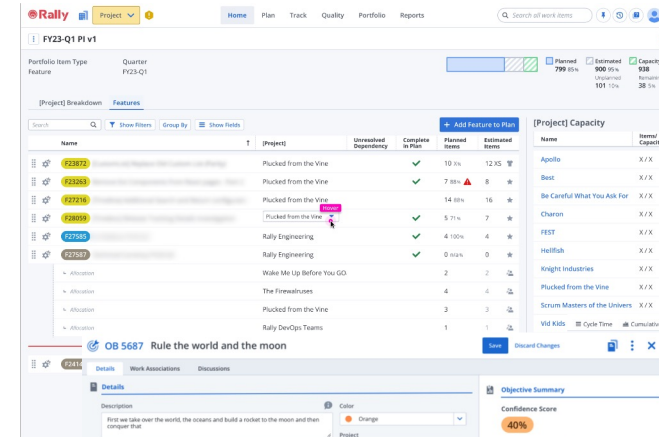
Connected Planning and Tracking

Portfolio Item Hierarchy

◉ Roll-up Features in Release Plans to Initiatives in this Roadmap Plan

○ Mirror Features in both Release Plans and this Roadmap Plan

Objective(s)

- Providing holistic, insightful way of tracking and understanding plans at multiple levels (Multi-Release, Release, Team, Iteration etc.) so that plans are connected for rolling up or down.

Why Is this Important?

- Users need to be able to utilize Rally for their planning activities without the necessity of external tools. Some of the biggest hurdles to adoption are visibility above one release, and bringing tracking/scope information alongside their plans.

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Insightful Work Management
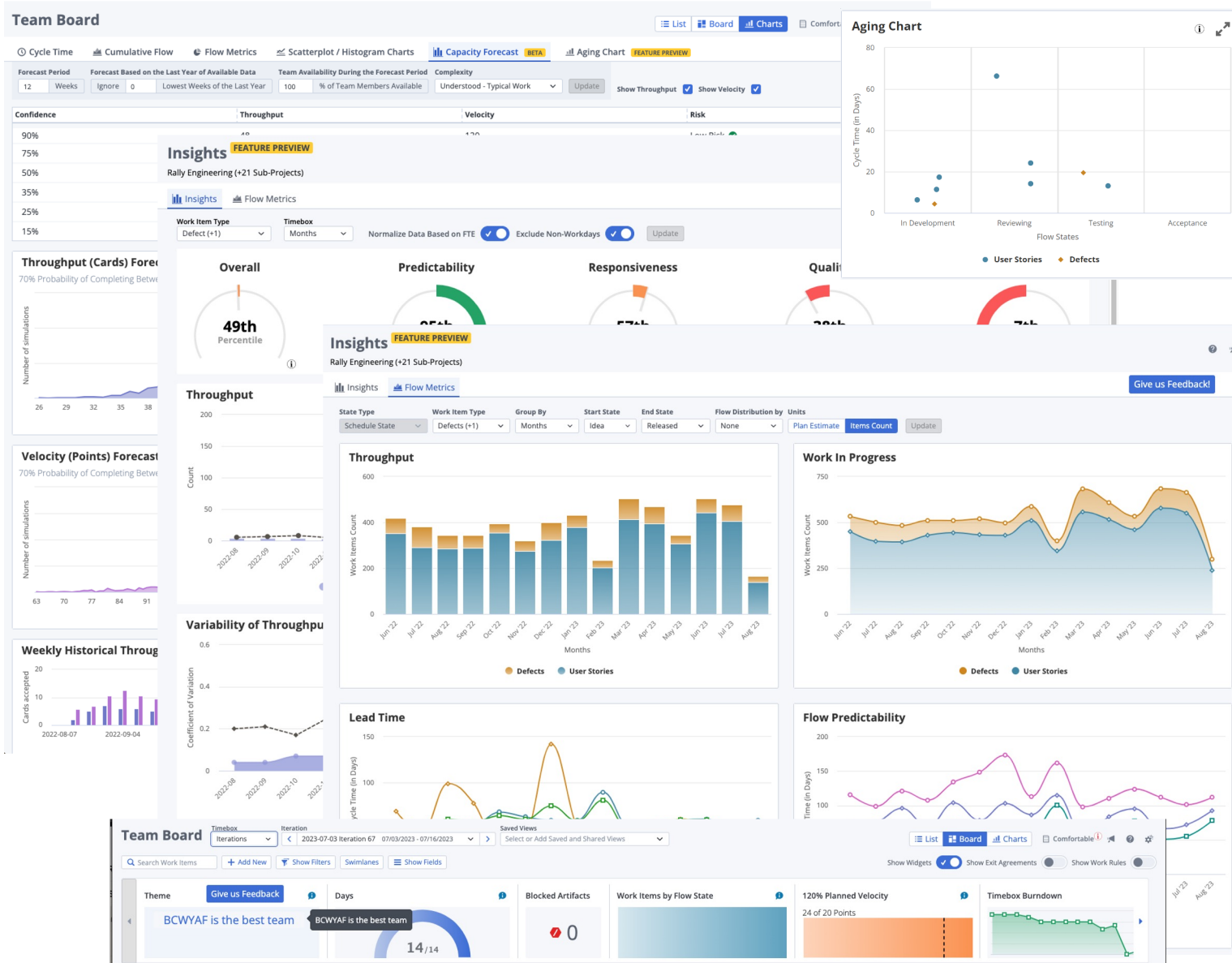
Objective(s)

- Improve performance, reduce complexity, and reduce costs for analytics systems
- Provide predictive analytics capabilities to help customers make better planning decisions
- Provide vertical reporting capabilities at scale

Why Is this Important?

- Users expect Rally to provide analytics and reporting at scale with high levels of performance
- Make it easier to make decisions using data

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Rally Widgets
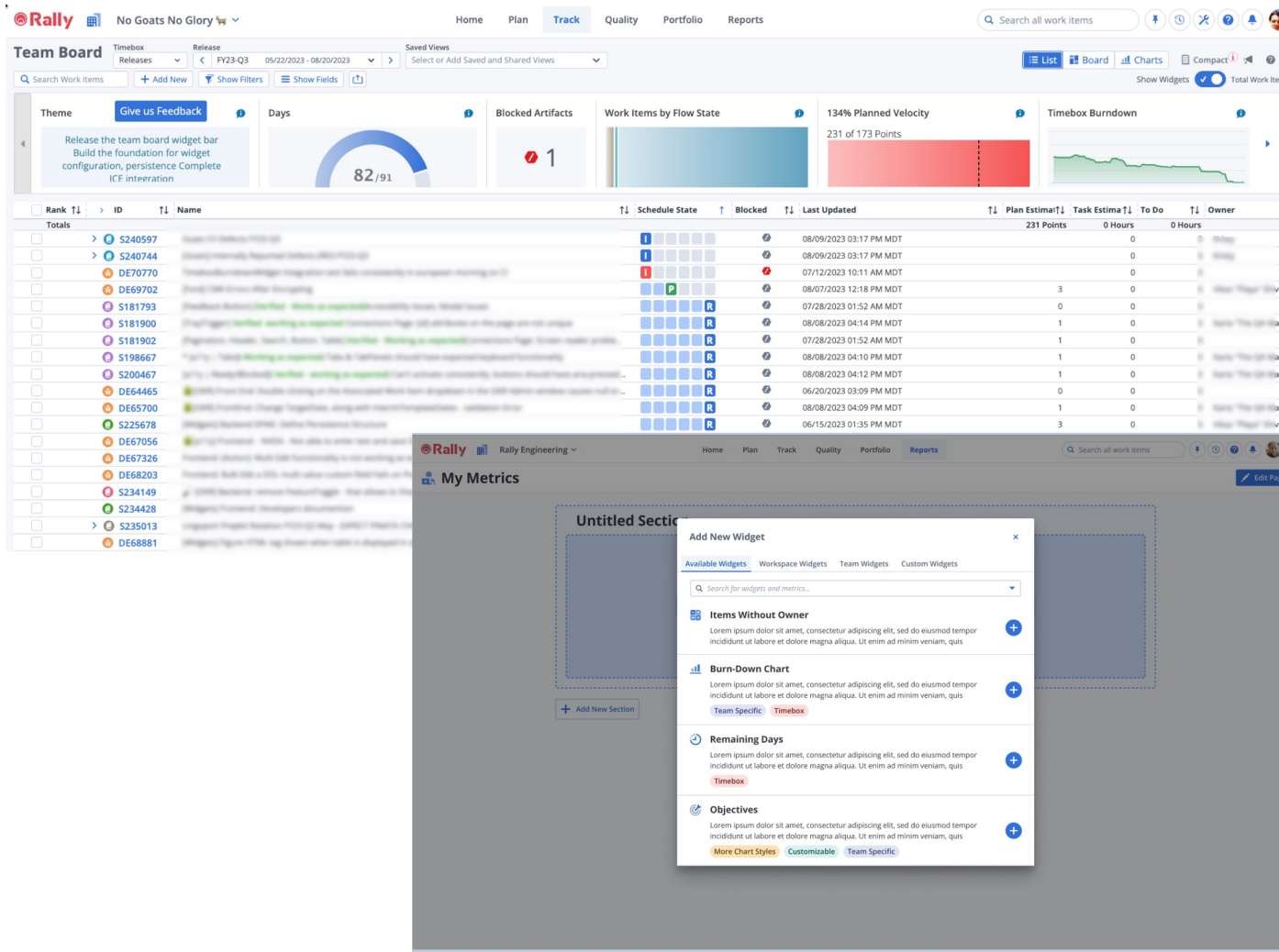
Objective(s)

- Make it easier for users to tell the stories they need within the context they are working without writing custom code
- Satisfy >80% of the need for custom apps with a set of modern, configurable visualizations

Why Is this Important?

- Make it easier for users to tell the stories they need within the context they are working without writing custom code
- Satisfy >80% of the need for custom apps with a set of modern, configurable visualizations

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New Features

HOT OFF THE PRESS

| Insightful Work Management | Capacity Forecasting Tool | Rally Insights & Portfolio Flow Metrics | Aging Chart |

| Connected Planning | Enhanced Capacity Planning |

| Platform | FedRAMP - Adv. Analytics | Feature Preview |

| Rally Widgets | Rally Widgets on the Teamboard |

| UX Enhancements | Rich Text Editor Updates | Team Board List View and Timebox Scoping | Recent Tags | Enterprise-Grade User Admin Experience |

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ConnectALL

ValueOps ConnectALL - At a Glance

Connect and automate all software solutions, artifacts, documents, data, etc. flowing across the software delivery value streams, in order to facilitate timely delivery with exceptional quality and predictability

Business/Enterprise Project Managers Business Analysts Developers Operations Testers Customers

Request → Plan → Build → Test → Deploy → Usage

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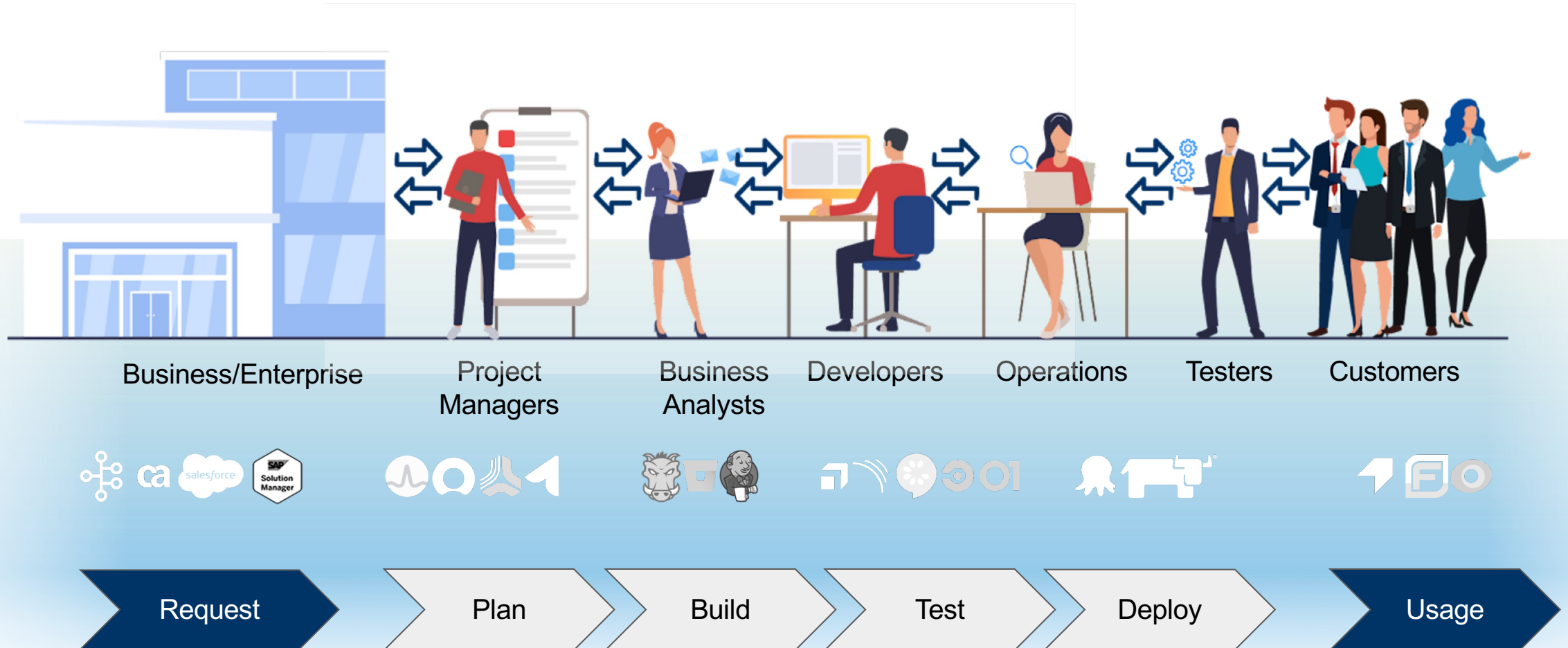
ValueOps ConnectALL - At a Glance

Automate workflows

Synchronize information

Achieve OKR goals

Provide transparency across disparate teams
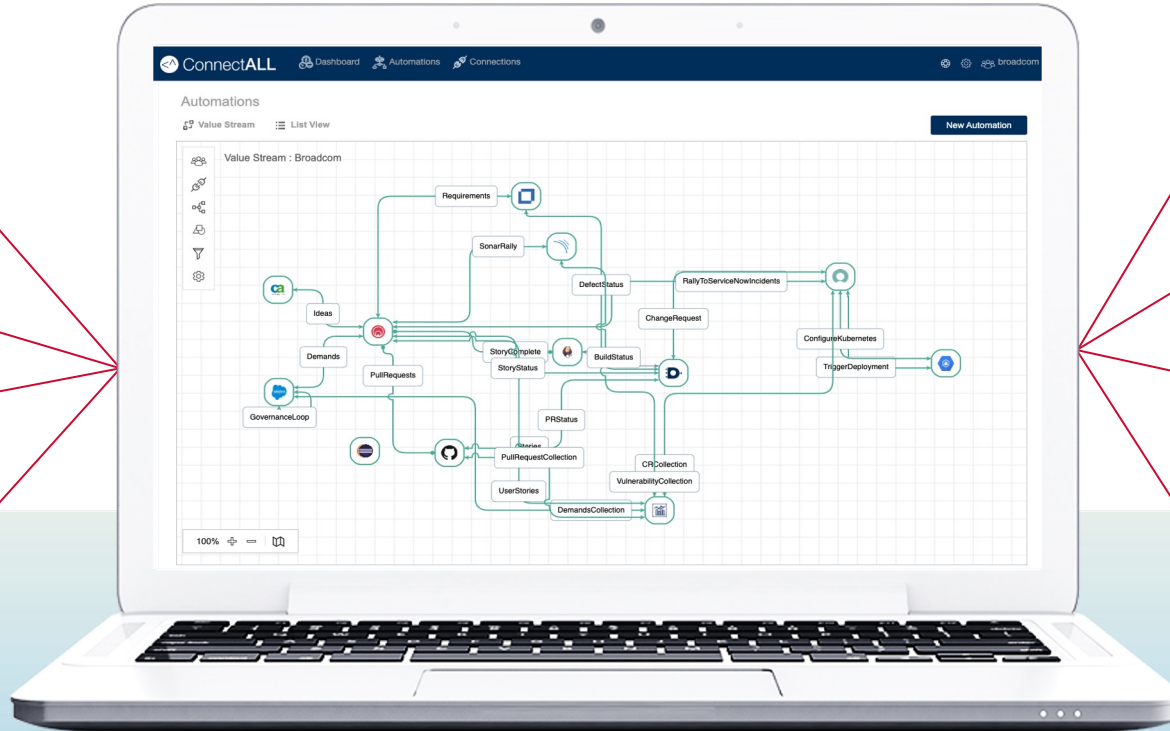
Harvest data for metrics

Enforce governance

Gather data for regulation and compliance

Identify and eliminate waste

| Request | Plan | Build | Test | Deploy | Usage |

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Automation at Every Step

ServiceNow	Clarity	Rally / Jira	Microfocus ALM	GitHub / Jenkins / Octopus
Service Management	**Portfolio Management**	**Requirements Management**	**Test Management**	**Config, Build & Deploy Mgmt.**
• Incidents • Issues • Requests	• Ideas • Strategies • Initiatives • Roadmaps	• Initiatives • Epics • User Stories • Tasks • Sub Tasks • Defects • Sprints	• Defects • Test Plans • Test Scripts • Tests • Results	• Commits • Pull Requests • Builds (Jobs) • Results • Deployments

Request ▶ **Plan** ▶ **Build** ▶ **Test** ▶ **Deploy** ▶ **Usage**

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Standard Adapters

Plan

BMC REMEDY	CHERWELL SERVICE MANAGEMENT	CONFLUENCE	DIGITAL.AI	HEAT SOFTWARE	IBM RATIONAL DOORS	IBM RATIONAL DOORS
IBM RATIONAL TEAM CONCERT	JAMA SOFTWARE	JIRA CORE	JIRA SOFTWARE	MICRO FOCUS ALM	MICROSOFT DYNAMICS CRM	MICROSOFT PROJECT SERVER
RALLY SOFTWARE	SALESFORCE	SAP SOLUTION MANAGER	SERVICENOW	SLACK	TRELLO	VERSIONONE
ZENDESK						

Code

AZURE DEVOPS	COVERITY	FORTIFY	GERRIT	GIT	GITHUB	GITLAB
GO	IBM RATIONAL CLEARCASE	MICRO FOCUS ALM	PERFORCE HELIX ALM	SONARQUBE	SUBVERSION	VERACODE

Build

APACHE ANT	AZURE DEVOPS	BITBUCKET	CIRCLECI	CODESHIP	CVS SERVER	DOCKER
GITHUB	GRUNT	HUDSON	JENKINS	KUBERNETES	MAVEN	PERFORCE HELIX CORE
TEAMCITY	TRAVIS CI					

Test

AZURE DEVOPS	AZURE DEVOPS SERVER	CUCUMBER	MICRO FOCUS ALM	MICRO FOCUS ALM OCTANE	QMETRY TEST MANAGEMENT	QTEST
SALESFORCE	SELENIUM	SMARTBEAR QACOMPLETE	TRICENTIS TOSCA	ZEPHYR		

Release

AWS CODEPIPELINE	CLOUDBEES FLOW	JFROG PIPELINES	MICRO FOCUS RELEASE CONTROL	OPENMAKE	RANCHER

Deploy

ANSIBLE	BAMBOO	CA TECHNOLOGIES	CHEF	JUJU	OCTOPUS DEPLOY	PUPPET
SALTSTACK	SHIPPABLE	URBANCODE	VAGRANT			

Operate

APPDYNAMIC	AZURE DEVOPS	DOCKER	IBM RATIONAL CLEARQUEST	KIBANA	KUBERNETES	MICRO FOCUS SERVICE MANAGER
OPENSHIFT	OPENSTACK	RACKSPACE	SAP SOLUTION MANAGER	SERVICENOW		

Monitor

AZURE DEVOPS	CISCO APPDYNAMICS	DYNATRACE	NEW RELIC	OPSGENIE	SOLARWINDS APPOPTICS	STACKIFY RETRACE

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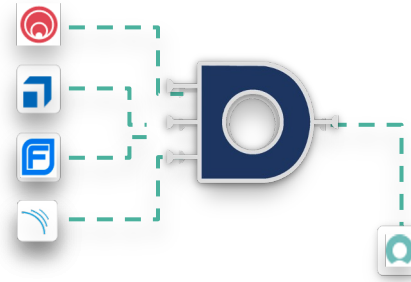
Additional Adapter Types

Universal

- Allows you to quickly connect to any tool in your software delivery value stream
- Through Swagger can turnaround adapters in a day

Logic Flow

- Smart monitoring and triggering utilizing conditional AND-Gates & OR-Gates
- e.g. - orchestrate and manage releases through conditions based on package availability, security scans, etc.

Database

- Sync records to and from any application with any database.
- Disperse centralized data to various tools & software solutions

Insights

- Capture and aggregate data flowing through the value stream - no need for synchronization
- Out-of-box data models for normalizing data between different software solutions

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Clarity

rego University
SAN DIEGO · 2023

Stay Engaged with Us

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

Email clarity@broadcom.com to sign up for any program

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Roadmap

	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1
Events					
Workforce Modeling	WFM: Plans w/ Resource Import & Hierarchy Navigator	Plans: Versioning	Plans: Generate by Resource or Investment OBS	Hierarchical Tree Grid	Draw Down Funding
	Staffing Improvments: Easier add/remove, max/min workspace, and colorization	Plans: Add'l Resource & Investment dimensions	Plans: Support for FTEs/Hours/Days	OBS sync w/ delta visibility	Resource Skills
		Staffing: Over/under allocation thresholds support	Staffing: Support for ETCs	Versioning	Workforce Modeling
Perpetual Teams	Teams: View resources in allocation Details	Teams: Convert to investments		Teams: Using Team Allocation as Availability for Investments	Rally Integration - Teams
				Process-Enable Resources	Teams Version 2.0
				Make Resource attributes available in the Staff module	
OKR Management	Custom object/subobject improvements: Name length, copy, separate Navigate right	Define OKR objects	Nested Grid Visualization	Sync Parent	Resource Manager Hierarchy
		Investment type parent mapping	Associate OKRs with resources/teams	Sync Target Values	Quick Navigation/Filters
					Resource Profile for visibility
Smart Automation	My Workspace: Action Items	Timesheet validation rules			Smart Automation
		Notifications: Send via business rules	Action Items: Option to Link to Modern UX for Email Notifications	To Do Automation	To Do Watchers
		Notifications: Library	Mobile To Do's		Integrations
		Notification bell updates dynamically	Notifications: To Do Owner	Import from CSV for Investments (CITs, Projects & Ideas)	Clarity Concierge
		Notification user settings for all types		Checklist Sections	Audit: Option to display date/time in grid
		TSV and OBS support for CSV import for custom master objects	Notifications: Assigned Resources	Mobile Enhancements	Investment Snapshots
Augmented Audit	Audit module on blueprintable objects	Audit: Grandparent & record name & ID		Group By for Per-Period metrics and assignments per-period metrics	
	Audit for TSV & OOTB MVL attributes			Adding Staffing Records as "Insert" instead of "Update"	
	Audit for User Groups, assigned resources, and action item status				
Advanced Visualization	Hierarchy - Export Timeline to PDF	Full Totals Aggregation w/o Group By	Hierarchy - Task Visibility	Roadmap Groups	Project Tiles Configuration
	View to compare Budget to Plan to Actuals	Reorder & group tiles for Custom Investment Types (CITs), custom objects, and Teams	Hierarchy: Board v2.0 card configuration	Hierarchy: Increase limit	Self Building Hierarchies
	Column layout configuration on canvas	Investment canvas: table widgets & widget configuration options	Canvases in Roadmaps & Objectives	Hierarchy - Task Timeline	Hierarchy Dashboards
	Multiple Group By's in Grids	Store column/swimlane/rows collapse/expand state on boards and grids per user			To Do Workspace Board
	Hierarchy - Agreements Visibility	Hierarchy: Options for tree layout		Canvases on Custom Master Objects	SQL Queries for Grids (reporting)
	Hierarchy - Key Milestones on Timeline	Hierarchy: Support for canvases		Channels into Modern UX	
	Visual widgets on Investment Canvas	Export non-status report canvases to PDF		Promote Items into the Menu	
	Upgrade Investment boards to v2.0	Upgrade rich text editor to support images and tables		Assign or Change Menu Icons	
	Personalize my Workspace	Boards: Hide "None" column when empty			
	Hierarchy - Events in Timeline	Nested grids for custom master objects			
RFEs (selected items)	Copy custom subobjects as part of template	Task Dependencies in Details	Ability to link from Classic to Modern via Object Actions	Right-click to Copy Tasks	Undo or Back Option
		Copy CITs & Ideas		Relabel fields per Investment Type	User Self Authentication
		Copy Tasks between Investments	Schedule roadmap sync for linked investments**	Option to show "Today" in the Task Timeline	PDF integrated to Job Scheduler
		Starred filter in Project Tiles	Sharing Saved Views via URL links**		Multi-Currency Transactions

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A Year's Worth of Features

Clarity 16.1.0

- **Transforming Investment Management**
  - Copy projects
  - Simplified Scheduling: Moving a task shifts all successor tasks
  - Retention of task timeline expand/collapse state & baseline compare
  - Flag to allow filtering of assignments to show only those for active resources
  - Make To Do's table available on Status Reports
  - Option to set Status Report Date to Current Date on preview
  - Status Reports workspace (across investments)
  - Bulk PDF export for Status Reports
  - Tasks workspace: Calendar for scheduling tasks `BETA`
  - Tasks workspace: Board w/ swimlanes, card configuration & sorting `BETA`
  - Timesheets: Convert Resource Manager Filter From String to Lookup
  - Timesheets: Viewing with Approval Rights for Closed Time Periods
  - Timesheets: Visual Widgets over grid
- **Reinventing Resource Management**
  - '% Availability' as a unit of measure
- **Providing Financial Transparency**
  - Transaction entry via grid
  - Field level security (FLS) on Cost Plans/Budgets/Benefit Plans
  - Visual widgets on Investment Cost Plan/Budget/Benefit Plan Detail modules
- **Clarity Checklists & To Do's**
  - My Workspace: Conversations and email notification improvements
  - Visual widgets on To Do modules within investments
- **Top Down Planning (Roadmaps)**
  - Drag-and-drop ordering of roadmap items in grid
  - Filters for 'Has dependencies' & 'Has agreements'
  - View option to display names on roadmap events and item events in legend
  - Auto-granting Roadmap Navigate right when Sharing

- **Lifecycle Management (incl. Demand Mgmt)**
  - Action Items module on Investments
  - Process Action Items: Ability to respond via email `BETA`
  - Hierarchies: Staff module with visual widgets
  - Hierarchies: Financials module editable w/ actuals drill down
  - Hierarchies: TSVs available for custom subobjects
- **Clarity Connections (Clarity-Rally)**
  - Sync individual investments on demand (C2R now; R2C in 16.1.0.1)
  - Quality-of-Life Improvements: Server time zone handling, support for Clarity 'enum' lookups & null values, immediate return of formatted Rally ID following creation from Clarity, & sync message indicates 'created in Rally'
- **Customer Voice**
  - Edit visual widgets in widgets ribbon
  - Ability to star (favorite) various subobjects (e.g. Roadmap Items, Risks)
  - Grouping for filter options
  - Views: List Favorites first, rename "Default" to "Recommended"
  - Views: Sharing via access groups
  - Option to display flyout on right or bottom
  - Option to configure the modules in the subobject detail flyouts
  - Persist Selected Items (within session)
  - Business Rules: Hide Attributes on Properties modules
  - Enable canvases with tables and attributes on all Investments
  - Investment Canvas: Stock/custom subobjects & To Dos available in tables
  - Page canvases: Add attribute support, including rich text
  - Users grid: Create users, mark as starred, add'l attributes & available in audit
  - Audit grid in Modern UX Administration
  - Conversations: Option to show in flyout for blueprintable objects
  - Conversations: Displays name & resource ID instead of name & role
  - Grids: Per Column Aggregation by Data Type (Avg, Count, Min, Max, Sum)
  - Generic CSV import for custom master objects `BETA`

Clarity 16.1.1

- **Transforming Investment Management**
  - Update Investment boards to v2.0
  - Start to **Advanced Visualizations**
    - Greater flexibility in canvas layout
    - Visual widgets based on subobjects on Investment Canvas
  - Automatic creation of Custom Investment Type (CIT) lookup when CIT is defined
  - Starred for Tasks, including when adding tasks to timesheets
  - Current, Next and Previous as smart filters for timesheet periods
  - Copy custom subobjects as part of template creation in Investments*
- **Reinventing Resource Management**
  - Staffing Timeline: Minimize/maximize workspaces
  - Teams: Ability to see team members in allocation Details panel
  - Staffing Timeline: Allocations over & under colorization
  - Staffing Timeline: Easier add of investments and/or resources/roles/teams
  - Staffing Timeline: Additional visibility to easily see unstaffed investments
  - Staff Grid: Navigate to Staff module by clicking Resource Full Name
- **Lifecycle Management (incl. Demand Mgmt)**
  - Originating Idea (convert Idea to Project) now linkable in Projects grid
  - Action Items: Library
  - Action Items: Module on custom master objects
  - Action Items: Separate delete from process delete
  - Action Items: Create purge job
  - Expansion of business rules at part of **Smart Automation**
    - Simpler ways to take simple actions in sequence or together
      - Including *setting a field value based on another field change*
      - *Or sending an action item*
  - **Augmented Audit** capabilities
    - Audit: Module available on blueprintable objects
    - Audit: Changed Date displays Date & Time (not just date)
    - Audit: TSV & Several OOTB MVL attributes available
    - Audit: Assigned Resources & User Groups
- **Business Intelligence & Mobile**
  - Action Items: Mobile

- **Providing Financial Transparency**
  - Additional attributes to compare budget vs plan vs actual*
  - Relabeling & tool tips for Cost Plan Detail & Benefit Plan Detail attributes
  - Multiple lines per grouping attribute combination*
  - Transactions REST API (Inbound)
  - Resource API allows updates to Resource Financial Attributes
- **Clarity Checklists & To Do's**
  - My Workspace: Action Items
  - Investment Manager filter in "All" To Dos grid and Smartlists
  - Improved Link Navigation in To Do Tasks, Risks, Issues, & Changes workspaces
  - Filter groups now available in cross-Investment Tasks workspace
- **Clarity Connections (Clarity-Rally)**
  - OKRs: Owner, interim targets, & actuals sync
  - Rally visual indicator for Portfolio Items created from Clarity
- **Customer Voice**
  - Update Custom Master Object boards to v2.0
  - Custom objects/subobjects name field length increased to 256
  - Copy custom objects/subobjects
  - Preview and error handling for custom master object CSV import
  - Update string filters with option to be lookups
  - Expose previously hidden "prefilters" as Required filters (presence required, NOT values)
  - Modern UX User Settings for Conversations & Sharing Notifications
  - "Not Securable" filter in Attributes grid
  - Separate custom object Navigate right from other rights
- **Top Down Planning**
  - Roadmaps: Upgraded to Board v2.0
  - Hierarchy: Agreements and connector lines in Timeline
  - Hierarchy: Key milestones as Timeline Events
  - Hierarchy: Export Timeline to PDF
  - Hierarchy: Option to configure the Details flyout for certain subobject modules
  - Plans in **Workforce Modeling**
    - Import resources to populate base totals
    - Aggregate views by Role, Employment Type and Investment Category, with additions & reductions
    - Hierarchy plan navigator

Clarity 16.1.2

- **Transforming Investment Management**
  - Starred filter in Project Tiles
  - Copy Tasks between Investments
  - Task Dependencies display in Details
  - Continuing work in **Advanced Visualizations**
    - Investment canvas: Table widgets & widget configuration options
    - Export non-status report canvases to PDF
    - Reorder & group tiles for CITs & custom master objects
  - Investment type parent mapping
- **Reinventing Resource Management**
  - Blueprints for Resources
  - Staffing: Starred for Investments and Resources
  - Staffing: Over/under allocation thresholds support
  - Staffing: Hard allocation support
- **Providing Financial Transparency**
  - Totals row aggregation without group by
  - Visibility into unposted transactions
- **Lifecycle Management (incl. Demand Mgmt)**
  - Notifications: Library
  - Notification bell updates dynamically
  - Notification user settings for all types
  - Expansion of business rules at part of **Smart Automation**
    - Notifications: Send via business rules
  - **Augmented Audit** capabilities
    - Audit: Enable Investment Financial Plans and Details
    - Audit: Grandparent & record name & ID
    - Audit: Enable for 3rd Level Subobjects (e.g., Assignments)

- **Business Intelligence & Mobile**
  - Mobile: Timesheet level notes
  - Mobile: Return own timesheet
  - Mobile: View future time periods for My Timesheet
  - Mobile: App Branding options
  - Mobile: User Settings page
- **Clarity Connections (Clarity-Rally)**
  - Foundations for **OKR Management**
    - Introduction of OOTB Objectives & Key Results objects
- **Customer Voice**
  - Multiple group by's in grids (up to 3)
  - Display asterisk for business rule required attributes on Properties module & Details flyout
  - Boards: Hide "None" column & swimlane when empty
  - Checklists: Co-Ownership and retaining To Do Status on Idea Conversion
  - TSV support for CSV import for custom master objects
  - Separate navigation rights for each administration tile
  - Option to have security rights override field level security (FLS)
- **Top Down Planning**
  - Roadmaps: Set "Sync with Events" as default
  - Roadmaps: Sync Parent & Type fields
  - Roadmaps: Snap to Period option
  - Hierarchy: Options for tree layout
  - Hierarchy: Support for canvases
  - Plans in **Workforce Modeling**
    - Versioning
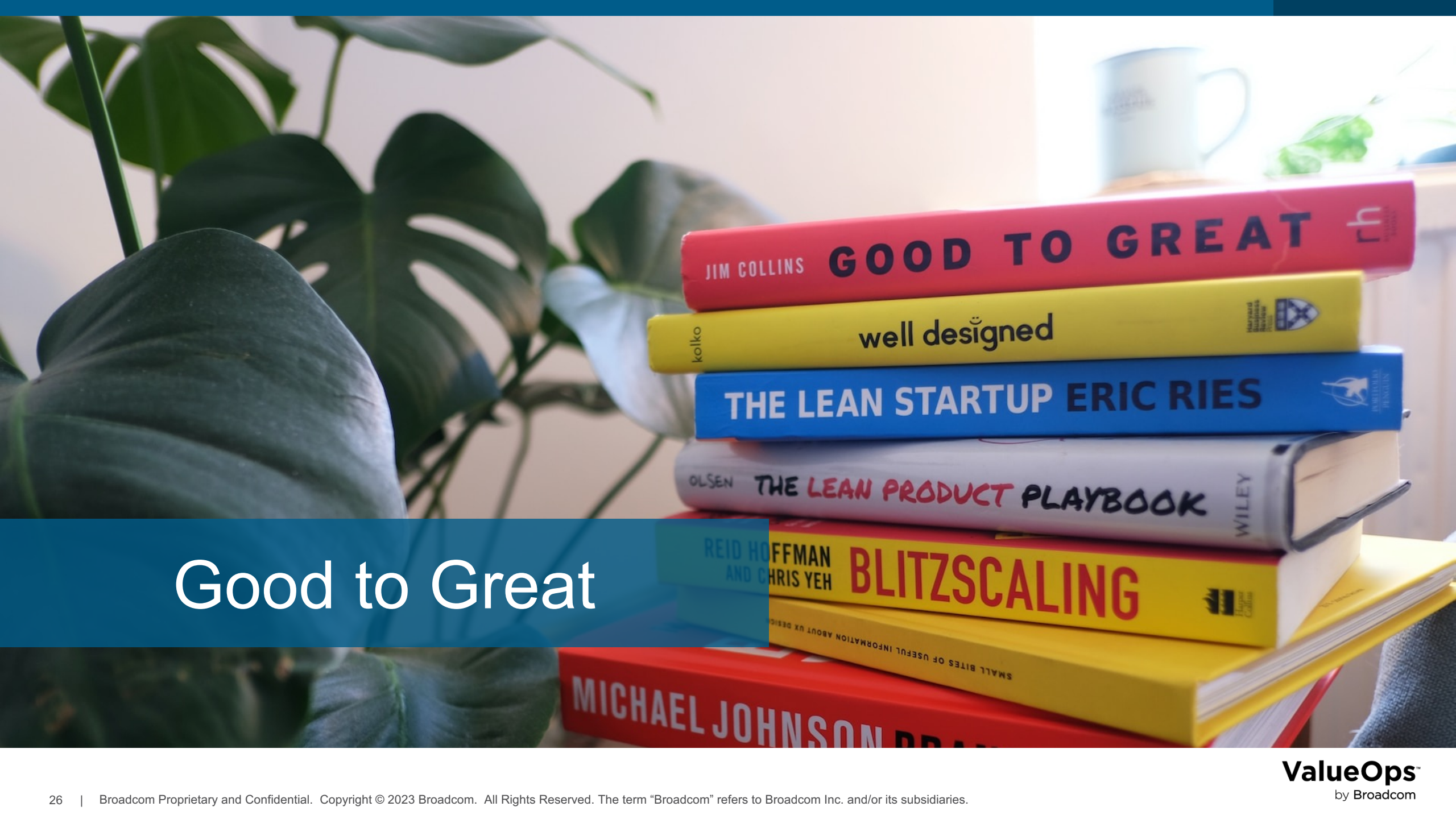   - Add'l Resource & Investment dimensions

Clarity 16.1.3

- **Top Down Planning**
  - Roadmaps: Swimlane Groups in Timeline*
  - Roadmaps: Collapse/expand Swimlanes & Swimlane Groups*
  - Roadmaps: Single-select lookups also available as badges in timeline*
  - Roadmaps: Create events from roadmap item dates (not from investment)
  - Roadmaps: Canvases
  - Roadmaps: Schedule sync for linked investments**
  - Hierarchies: v2.0 card configuration
  - Hierarchies: Tasks module with Board, Calendar & Grid Layouts
  - Hierarchies: "Parent" and "Level" attributes available in subobject modules
  - Plans in **Workforce Modeling**
    - Generate by Investment OBS w/ support for FTE/Hours/Days*
    - Sync Investments/Staff with Plans
    - Plans Administration: Configuration Control for Attributes to Include
- **Transforming Investment Management**
  - Copy Custom Investment Types (CITs) & Ideas*
  - Continuing work in **Advanced Visualizations**
    - Status Report Canvas: v2.0 Chart & Table widgets (incl Add'l Target Objects)
    - Investment Canvas: Additional Target Objects (Staff, Financials, Status)
  - Risks/Issues/Changes name length extended to 256 characters
  - Timesheet/Time Entry Note Date*
- **Reinventing Resource Management**
  - Evolution to **Perpetual Teams**
    - Teams: Converted to investments*
    - Teams: Reorder & group tiles, Copy, Create from Template
  - Staffing: Support for Assignments/ETCs*
  - Staffing: Option to "Hide empty groups"
- **Providing Financial Transparency**
  - Cross-investment Posted transactions workspace

- **Clarity Checklists & Mobile**
  - Note field on To Do's*
  - My Workspace: Conversation Feed Grouping
  - Mobile: Checklists
- **Clarity Connections (Clarity-Rally)**
  - **OKR Management**
    - Option for OBS security on Objectives
    - Display mappings out of the box (e.g., progress, confidence score)
    - Add To Do's to Key Results*
    - Custom sub-objects for Objectives
    - Nested subobjects in grid for Objectives & Key Results
  - Continuing work in **Advanced Visualizations**
    - Canvases in Objectives
    - Support for Objective Hierarchies
- **Customer Voice**
  - Generate URL links that include the view to display** (sharing is separate!)
  - View Options: Ability to pick 'x' number of periods based on Start Date**
  - Persist column/swimlane collapse/expand state on boards per user
  - Picklists: Requires a specific security right to delete if you did not create them**
  - Create from Template for Objectives, Agreements & CMOs
  - Help Text on Create/Edit layouts*
  - Rich text support for images & tables*
  - Nested subobjects in grid for Custom Master Objects (CMOs)
  - Introduction of blueprintable Subobject pages*
- **Lifecycle Management (incl. Demand Mgmt)**
  - Action Items: Option to Link to Modern UX for Process Notifications*
  - Notifications: Link based on Target Object (incl subobjects)*
  - Notifications: To Do Owner*
  - Notifications: Task Assignees*

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Clarity 16.2.0 (tentative and definitely subject to change)

- **Top Down Planning**
  - Continued work in **Advanced Visualizations**
    - Roadmaps: Roadmap groups (aka roadmap of roadmaps)*
    - Hierarchies: Increase limit (to 3000 nodes)
    - Hierarchies: Tasks timeline layout
  - Plans in **Workforce Modeling** `BETA`
    - Hierarchical tree grid
    - OBS sync w/ delta visibility
    - Versioning

- **Transforming Investment Management**
  - Timesheet validation rules*
  - Right-click copy support for Tasks*

- **Reinventing Resource Management**
  - Evolution to **Perpetual Teams**
    - Teams: Calculate team resource availability from the time-series allocations*
  - Enabling Resource object for processes/workflow*
  - Make Resource attributes available in Staff module*
  - Resource & roles: Support for financial fields in Modern UX*
  - **Augmented Audit** capabilities
    - Group By for Per-Period metrics and assignments per-period metrics
    - Adding Staffing Records as "Insert" instead of "Update"

- **Clarity Checklists & Mobile**
  - Checklists: Sections**
  - Mobile: Note date support in Timesheets
  - Mobile: Enhanced "Add Tasks" to timesheet
  - Mobile: Smartlists (view only)
  - Mobile: MS Intune support
  - Mobile: Option for URLs to link to mobile

- **Clarity Connections (Clarity-Rally)**
  - **OKR Management**
    - Sync support for Parent field and Target Values

- **Customer Voice**
  - Channels into Modern UX*
  - Promote investment and pages into the menu
  - Assign or change icons in the menu
  - Expand or collapse menu labels per user
  - Relabel fields per investment type**
  - Option to show "Today" in the Task timeline**
  - Quality-of-Life improvements for Help Text fields
  - Import from CSV for Investment, Projects & Ideas

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People Centric Planning

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Good to Great

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Innovation Flywheel

|

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Draw Down Funding

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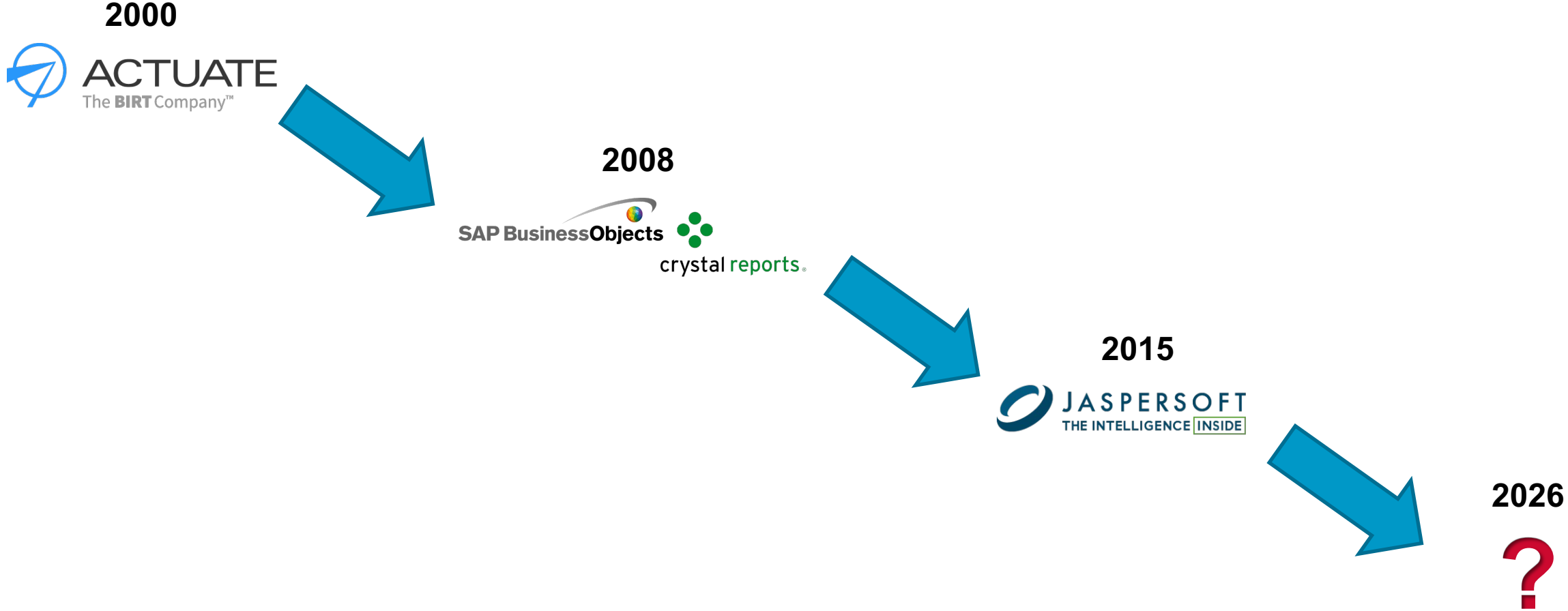by **Broadcom**

Bigger Better Reporting

|

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Jaspersoft is going away as of December 31, <u>2026</u> (39 months from now)

1. Jaspersoft-based reporting will no longer be available via Reports & Jobs in Clarity

2. The Advanced Reporting ad hoc console will no longer be available via Clarity

3. Configuration changes (like custom fields) will no longer be automatically added to the Jaspersoft domains

4. Jaspersoft Server & Studio will no longer be packaged/licensed with Clarity

- There is nothing to prevent you from using Jaspersoft with Clarity on your own like any other reporting solution should you choose
  - What is being removed is the integration (security, configuration updates, etc.)

- If you have an On Premise Perpetual license, you will be able to run the last Jaspersoft version you download prior to the end date (Dec 31, 2026) indefinitely
  - Otherwise, you can procure licenses for Jaspersoft directly from CSG

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So what's going to replace it?

2000 ACTUATE The BIRT Company™

2008 SAP BusinessObjects / crystal reports

2015 JASPERSOFT THE INTELLIGENCE INSIDE

2026 ?

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So what's going to replace it?

Two pronged approach

1. **OData Connector enhancement**
   - Make available for On Premise customers
   - Incorporate Clarity security into the OData calls
   - Allow OData calls against both the data warehouse AND the transactional database

2. **Our own Clarity-native reporting solution**
   - After evaluating the alternative solutions out there, we decided it was best to do it ourselves
   - We've already started the ball rolling on this process
   - We will share a LOT more details about this as we go (and next year at RegoU)

We believe this is a HUGE opportunity!

Optimized data retrieval, AI-assisted queries, alternative format options, etc.

We want YOU to take part: **clarity.reporting@broadcom.com**

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

Questions?

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.