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# Frictionless Cost Accounting Essentials: Stop Guessing What Development Costs You

Your Guides:

Brian Nathanson, Head of Product | Clarity  
Matthew Gorbsky, Head of Product | Rally

# Agenda

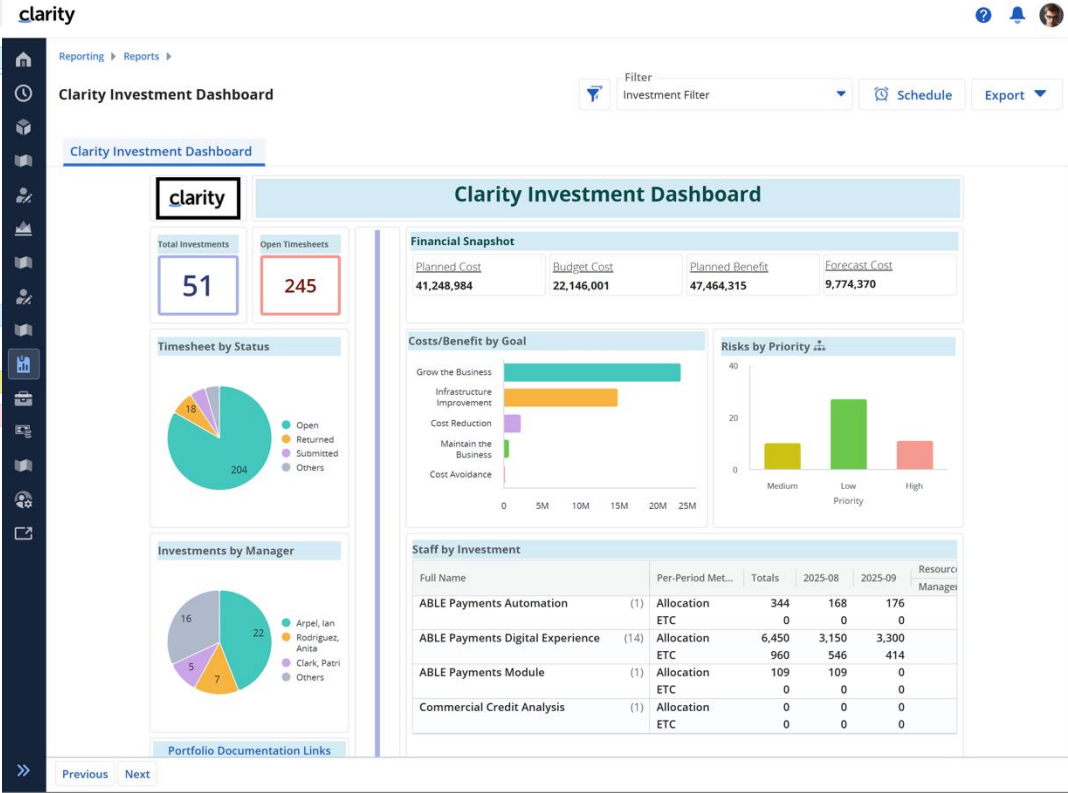
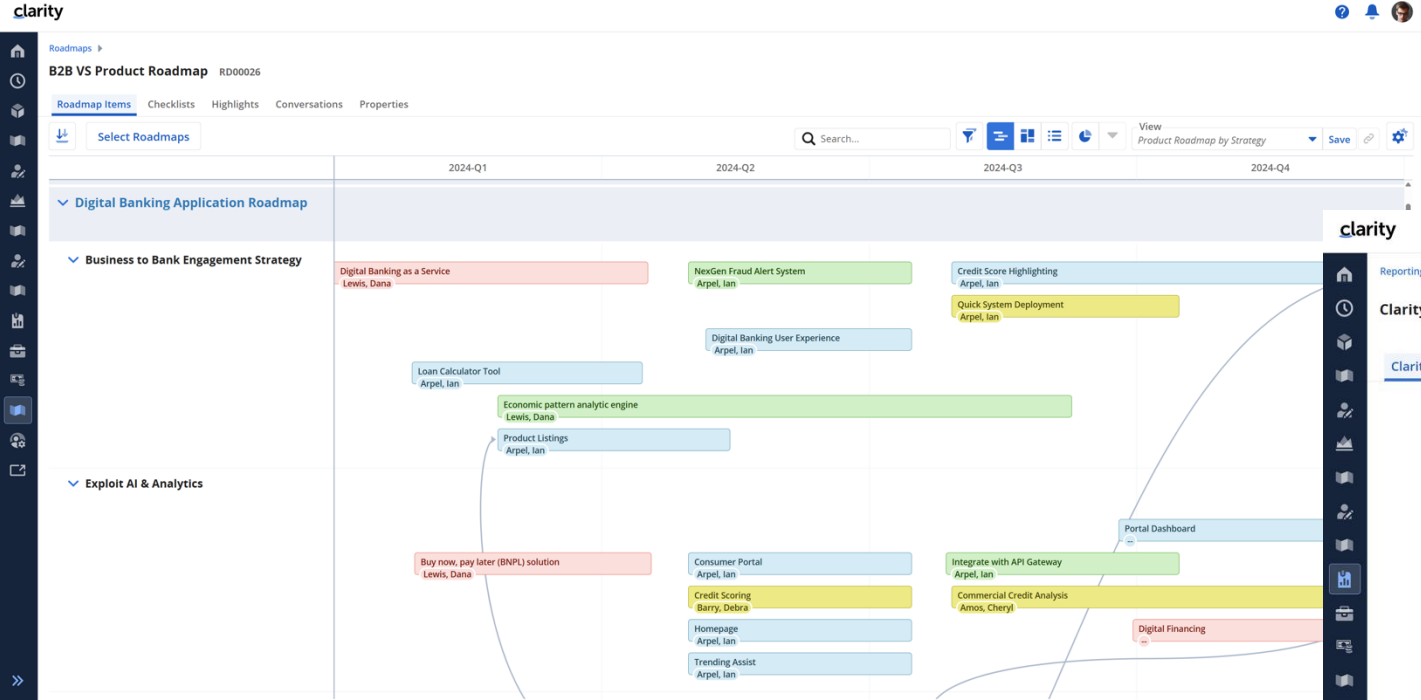
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- The Challenge of Opaque Development Costs
- Configuring Clarity for Frictionless Cost Accounting
- The Engine of Frictionless Data: Rally + The Integration
- "But My Teams Use Jira..." - A Path to Full Visibility
- What To Do Next
- Q&A

# The Challenge of Opaque Development Costs

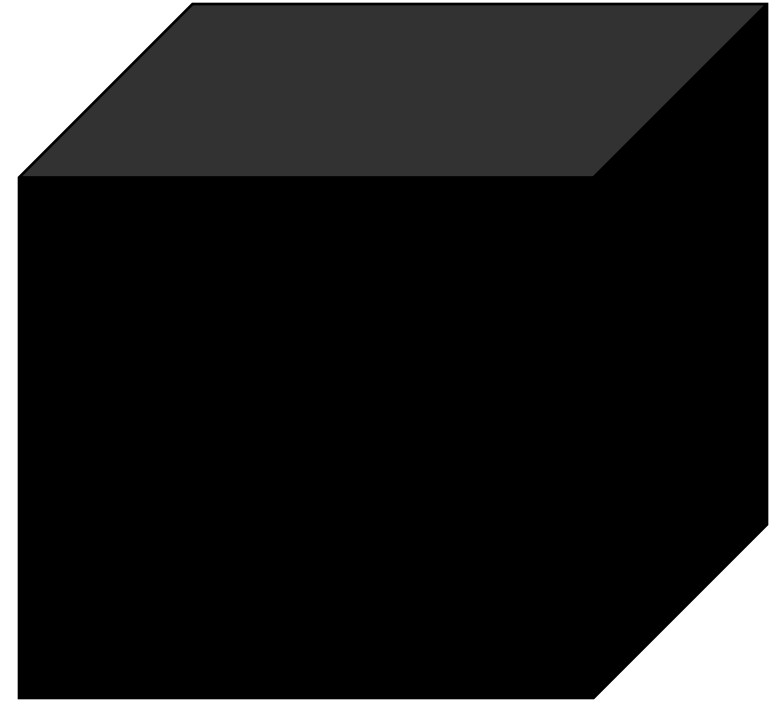
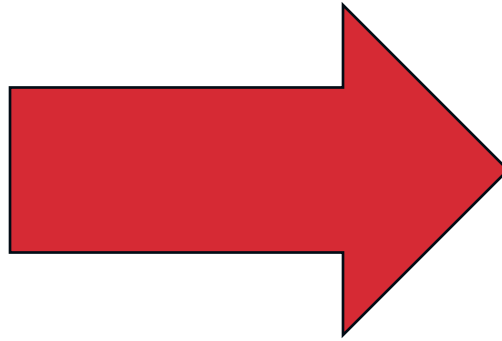


# Your Organizations Have the Plan



# The Problem: The Handoff into the "Black Box"

clarity



**Once work enters the development lifecycle, financial visibility is often lost.**

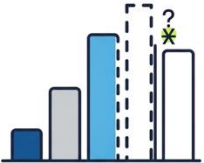
# The Symptoms of Guesswork



- **Chasing Timesheets:** Constantly reminding developers to fill out timesheets, which they see as a distraction from their real work.



- **Spreadsheet Gymnastics:** Trying to reconcile manually-exported reports from agile tools with your financial plan in Clarity.



- **Relying on Estimates:** Your financial reporting is based on initial guesses rather than the actual effort being spent.



- **Delayed Decisions:** By the time you get the data, it's often too late to make meaningful adjustments to scope or budget.

# The Solution: Frictionless Cost Accounting

7

**[Agile Work Done] + [Automation] =  
[Real-Time Financial Truth]**

# Our Framework for Today

Auto-  
Populate

Auto-  
Submit

Auto-  
Approve

# Configuring Clarity for Frictionless Cost Accounting



# Our Framework for Today

Auto-  
Populate

Auto-  
Submit

Auto-  
Approve

# Auto-Submit

- Exactly what it sounds like: Submitting the timesheet
- Parameters are available to narrow the scope in various combinations
  - Resource OBS
  - Resource Manager
  - Booking Manager
  - Team
  - Primary Role
  - Resource
  - Person Type
  - Resource Active
- Submission rules DO get applied and will result in a notification to the user if the card cannot be successfully submitted

Job Type: Auto-submit Timesheets - Job Properties

**General**

JOB NAME  
Auto-submit Timesheets

**Parameters**

TIME PERIOD  
Current Period

RESOURCE OBS  
Corporate Department OBS:ARD Business Unit

OBS MODE  
Unit and descendants

RESOURCE MANAGER  
Barry, Debra

BOOKING MANAGER  
Arpel, Ian

TEAM  
AI Team  
Blackhawks Team

PRIMARY ROLE  
Corporate Marketing

RESOURCE  
Amos, Cheryl  
Andersson, Peter  
Baker, Isaac

PERSON TYPE  
Contractor  
Contractor - Part Time  
Employee  
Employee - Part Time

RESOURCE ACTIVE  
Yes

# Auto-Approve

- Exactly what it sounds like:  
Approving the timesheet
- Automation that actually puts numbers in the cells
- Can still go into the timesheet and see/adjust the numbers
- **Two main methods**
  - **Populate Timesheets** job – Add Assigned Tasks (with ETC)
  - **Timesheet Integration** job – Retrieves Calculated Time from Rally based on Teams

Job Type: Auto-approve Timesheets - *Job Properties*

**General**

☐ JOB NAME  
Auto-approve Timesheets

**Parameters**

☐ TIME PERIOD  
Current Period

RESOURCE OBS  
Corporate Department OBS:ARD Business Unit

OBS MODE  
Unit and descendants

RESOURCE MANAGER  
Amos, Cheryl  
Barry, Debra

BOOKING MANAGER  
Baker, Isaac

TEAM  
Digital Team  
Integration Team

**PRIMARY ROLE**  
Architect  
Business Analyst

**RESOURCE**  
Amos, Cheryl  
Arpel, Ian

**PERSON TYPE**  
Contractor  
Contractor - Part Time  
Employee  
Employee - Part Time

**RESOURCE ACTIVE**  
Yes

# Auto-Populate

- Exactly what it sounds like: Filling out the timesheet
- Automation that actually puts numbers in the cells
- Can still go into the timesheet and see/adjust the numbers
- **Two main methods**
  - **Populate Timesheets** job – Add Assigned Tasks (with ETC)
  - **Timesheet Integration** job – Retrieves Calculated Time from Rally based on Teams

# Auto-Populate

- Exactly what it sounds like: Filling out the timesheet
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- **Two main methods**
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  - **Timesheet Integration** job – Retrieves Calculated Time from Rally based on Teams

# Populate Timesheets (from ETCs)

Job Type: Populate Timesheets - *Job Properties*

General

JOB NAME  
Populate Timesheets

Parameters

TIME PERIOD  
Current Period

POPULATION METHOD  
Add Assigned Tasks (with ETC)

OVERWRITE TIME ENTRIES  
☒

INVESTMENT TYPE

Project

INVESTMENT TO EXCLUDE

RESOURCE OBS  
Corporate Department OBS:ARD Business Unit

OBS MODE  
Unit and descendants

RESOURCE MANAGER

POPULATION METHOD  
[-- Select --]  
[-- Select --]  
Add Assigned Tasks  
Add Assigned Tasks (with ETC)

- Investment Type
- Investment to Exclude
- Resource OBS
- Resource Manager
- Booking Manager
- Team
- Primary Role
- Resource
- Person Type
  - Typically Employee/Contractor
- Resource Active/Inactive

**Especially suitable for situations where the time spent each period doesn't vary much – such as allocations to applications  
(Used in conjunction with Effort tasks if you want to populate the timesheet based on allocations vs ETCs)**

# Detailed Delivery (Timesheet Integration)

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- Setting up Clarity for FCA involves ten steps (plus Clarity-Rally integration)
- Not difficult but issues that arise generally come from having not applied one of these steps correctly
- Once set up correctly, like any good automation, it just WORKS

# FCA: Administration Settings and Enabling

## ❖ Step 1:

- Create the Rally integration instance in Classic
    - Provide Integration URL, Integration Instance, Integration Key and create Integration instance
- Ex: FCA

## ❖ Step 2:

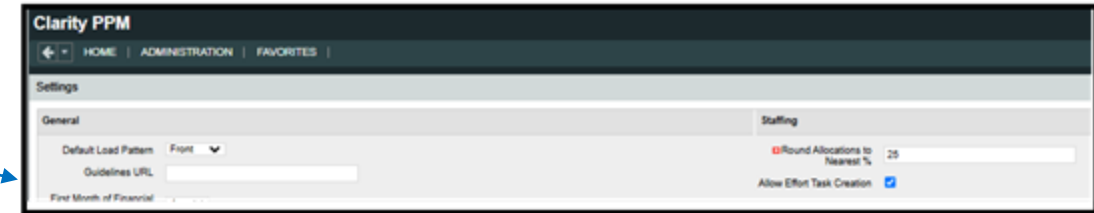
- Create values under 'Financial Work type'(fin\_work\_type) lookup
  - Financial Work Type lookup is Static Type and shipped without OOTB values.
  - Expected for organization to supply their desired financial activities
  - Ex: Create values like
    - New Feature Development
    - Research
    - QA Testing
    - Technical Debt

| Lookup Value                                     | ID       |
|--------------------------------------------------|----------|
| <input type="checkbox"/> New Feature Development | NFD      |
| <input type="checkbox"/> Research                | research |
| <input type="checkbox"/> QA Testing              | QA       |
| <input type="checkbox"/> Technical Debt          | techdebt |
| <input type="checkbox"/> Defect                  | defect   |

# FCA: Administration Settings and Enabling

## ❖ Step 3:

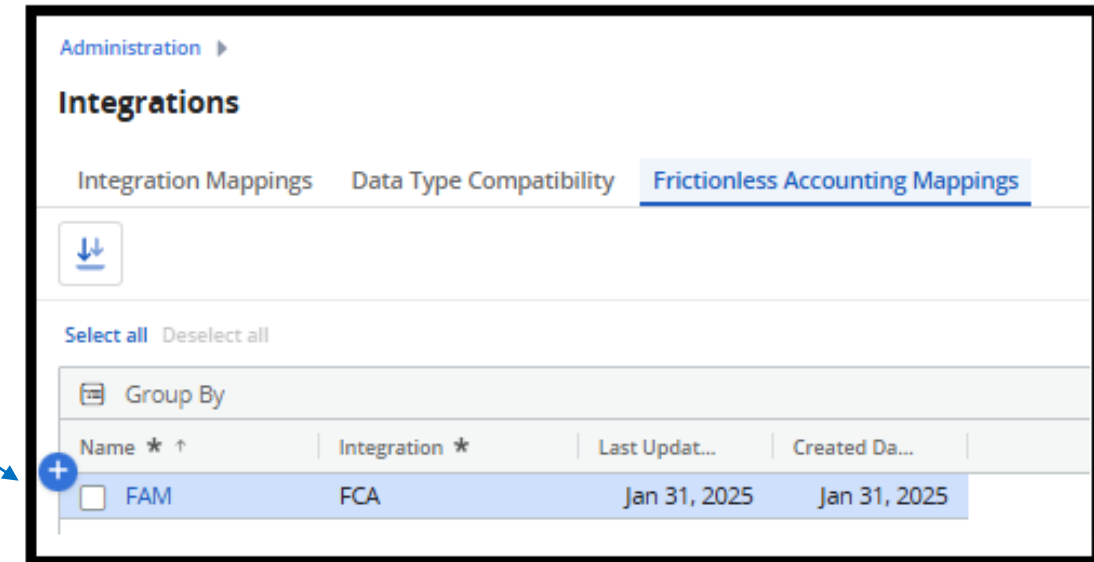
To make FCA work, you must enable the "Allow Effort Task Creation" flag in Administration → Project Management → Settings



## ❖ Step 4:

In Modern UX Administration → Integrations, create a Frictionless Accounting Mapping instance

- There is a dedicated Modern UX Administration screen for defining Frictionless Accounting Mappings and enable Frictionless Cost Accounting for Clarity
- You click on the Name of Frictionless Account Mapping Instance to get into the respective Frictionless Account Mapping definition
  - You can only create *one* FCA mapping per Rally workspace



# FCA: Administration Settings and Enabling

## Frictionless Account Mapping

### ❖ Step 5:

#### • Investment Mapping

- Capital Actuals - Investment level at which an organization captures actuals for time entry and transactions
  - Clarity Investment: Represents the list of Clarity Investments (e.g., Project, Custom Investment)
  - Rally Portfolio Item: Portfolio Item level at which an organization captures actuals for time entry and transactions. Represents the lowest level Portfolio Item from the target Rally system.  
Best practice: Should be Rally Lowest Level Portfolio Item (should be Feature)
- Capital Approval - Investment level at which an organization authorizes capital expenditures as well as take depreciation (once investment is in service)
  - Clarity Investment: Represents the configured Clarity Investments (e.g., Project, Custom Investment)
  - Rally Portfolio Item: Portfolio Item level at which an organization authorizes capital expenditures. Represents the configured Portfolio Item levels from the target Rally system.  
Best practice: Should be higher than a Feature but Clarity will not stop a user from selecting a Feature if you want to be highly aggressive about your capital strategy

The screenshot shows the 'FAM' (Frictionless Account Mapping) settings page. The 'Investment Mapping' tab is selected and highlighted. Under 'Capital Actuals', 'Clarity Investment' is set to 'Project' and 'Rally Portfolio Item' is set to 'Feature'. Under 'Capital Approval', 'Clarity Investment' is set to 'Project' and 'Rally Portfolio Item' is set to 'Feature'. At the bottom, the 'Financial Work Type Task Mapping' table shows a mapping for 'Defect' to 'Operating'.

# FCA: Administration Settings and Enabling

## Frictionless Account Mapping

### ❖ Step 6:

- Set up the 'Financial Work Type' to 'Task' Mapping
  - Add Financial Work Type values to the Grid
    - Select 'Financial Work Type' look up value like 'Defect'
    - Add Task ID
    - Select 'Cost Type'
    - Select the Financial Work Type as Active, to create a Financial Work Type value in Rally
    - As of now, Rally Portfolio Items will not be populated
    - Run 'Import Integrations' Job with the Integration created in the first step Ex: FCA. This Job imports Rally Portfolio Items and Teams for Frictionless Cost Accounting
    - After successful execution of 'Import Integrations' job, Rally Portfolio Items and Rally Object ID will be populated

**FAM**

Settings

Enable frictionless cost accounting  
Clicking this will create a 'Capital approval' lookup attribute for the selected Capital Approval Clarity Investment.

**Investment Mapping**

**Capital Actuals**

Clarity Investment \* Rally Portfolio Item \*

Project Feature

**Capital Approval**

Clarity Investment \* Rally Portfolio Item \*

Project Feature

**Financial Work Type Task Mapping**

Note: Financial work type lookup value needs to be added.

| Financial Work Type * | Task ID * | Cost Type * | Active | Rally Object ID |
|-----------------------|-----------|-------------|--------|-----------------|
| Defect                | defect    | Operating   |        |                 |

**Settings**

Enable frictionless cost accounting  
Clicking this will create a 'Capital approval' lookup attribute for the selected Capital Approval Clarity Investment.

**Investment Mapping**

**Capital Actuals**

Clarity Investment \* Rally Portfolio Item \*

Project Feature

**Capital Approval**

Clarity Investment \* Rally Portfolio Item \*

Project Feature

**Financial Work Type Task Mapping**

Note: Financial work type lookup value needs to be added.

| Financial Work Type *   | Task ID *               | Cost Type * | Active | Rally Object ID |
|-------------------------|-------------------------|-------------|--------|-----------------|
| Defect                  | defect                  | Operating   |        | 816813493255    |
| New Feature Development | new feature development | Capital     |        | 8171057462345   |

# FCA: Administration Settings and Enabling

## Frictionless Account Mapping

### ❖ Step 7:

- Set the 'Enable frictionless cost accounting' toggle to On
  - This will create a 'Capital Approval' lookup attribute for the selected 'Capital Approval' Clarity Investment

**FAM**

**Settings**

☒ Enable frictionless cost accounting  
Clicking this will create a "Capital Approval" lookup attribute for the selected Capital Approval Clarity Investment.

**Investment Mapping**

**Capital Actuals**

Clarity Investment \* Rally Portfolio Item \* Capital Approval  
Project Feature Project

**Financial Work Type Task Mapping**

Note: Financial work type lookup value needs to be added.

| Financial Work Type *   | Task ID *               | Cost Type * | Active                              | Rally Object ID |
|-------------------------|-------------------------|-------------|-------------------------------------|-----------------|
| New Feature Development | new feature development | Capital     | <input checked="" type="checkbox"/> | 817288482349    |
| Defect                  | defect                  | Operating   | <input checked="" type="checkbox"/> | 816813493255    |

**Projects**

Actions New from Template

Match Filters All Any Add filter groups

Template = No Active = Yes Project Name = ABLE Payments Module

Select all Deselect all

Group By

Starred Project Name \* +

ABLE Payments Module Sep 12, 20

Capital Approval

Search...

None

Approved

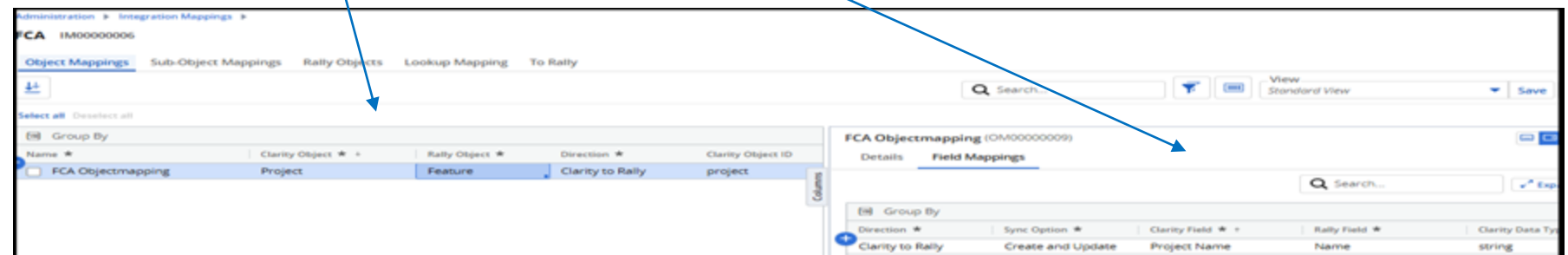
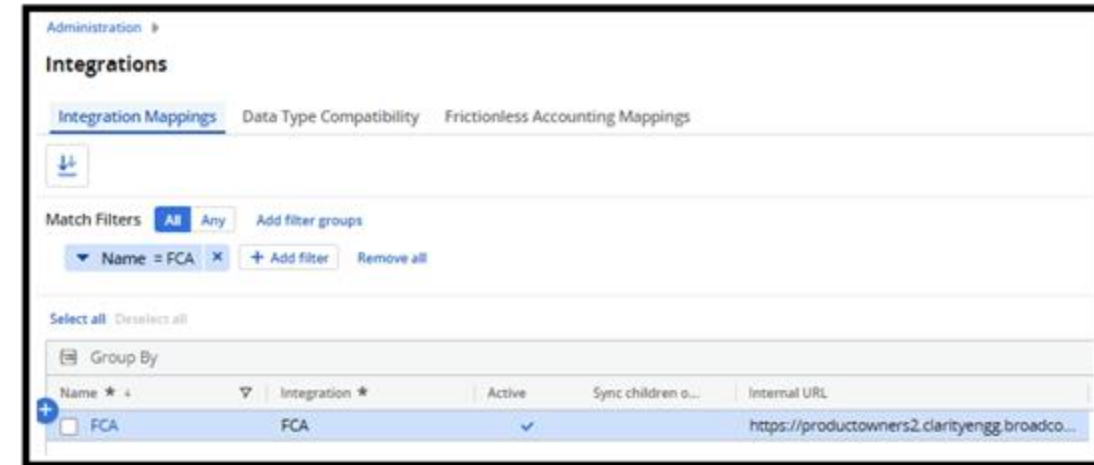
Ready to Depreciate

# FCA: Administration Settings and Enabling

## Integration Mappings

### ❖ Step 8:

- In Modern UX Administration → Integrations, create an Integration instance that uses the Integration created in Classic in Step 1
  - Run the 'Import Integration Mappings' job
  - Click into your Integration Instance and set up your Object and Field Mappings
    - Map Clarity investments to selected Rally Portfolio items
    - Define field mappings to specify direction, sync-option, Clarity investments/fields and Rally portfolio items/fields.
      - The only required field is “Name” if sending from Clarity
      - You also need to send “Start” and “Finish” if sending from Rally (and either send or have autonumbering turned on for IDs).



# FCA: Administration Settings and Enabling

## Team Investments

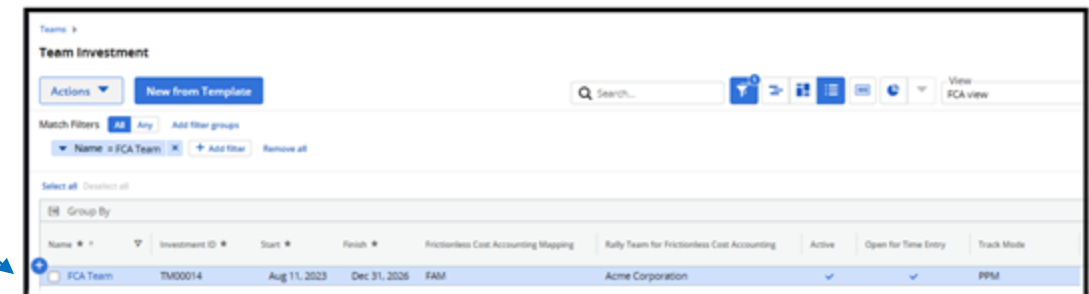
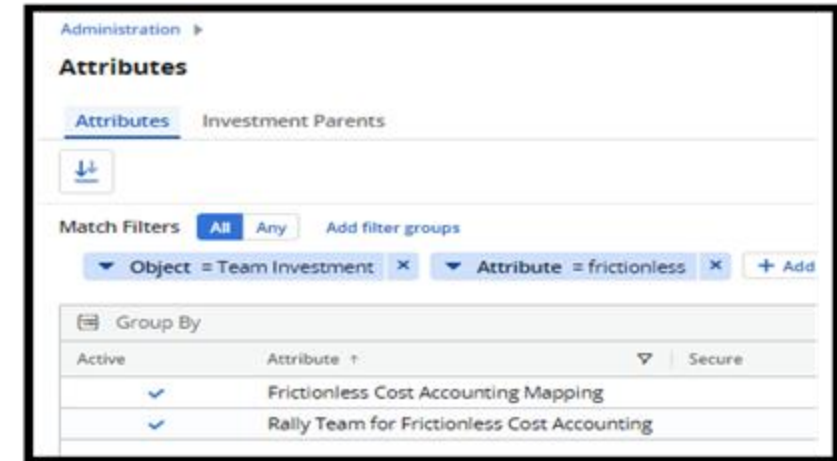
### ❖ Step 9:

#### • In Modern UX Administration → Attributes

- Unsecure the 'Frictionless Cost Accounting Mapping' and 'Rally Team for Frictionless Cost Accounting' attributes for the desired Team Investment type object.
- These are two new FCA attributes we introduced but by default they are secured so you don't see them anywhere.

#### • Go to the workspace for your desired Team type investment

- Create/Update a team investment instance
  - Start and Finish Dates
  - Frictionless Cost Accounting Mapping
  - Rally Team for Frictionless Cost Accounting
  - Team should be 'Active', 'Open for Time Entry' and 'Track Mode' should be set to 'PPM'



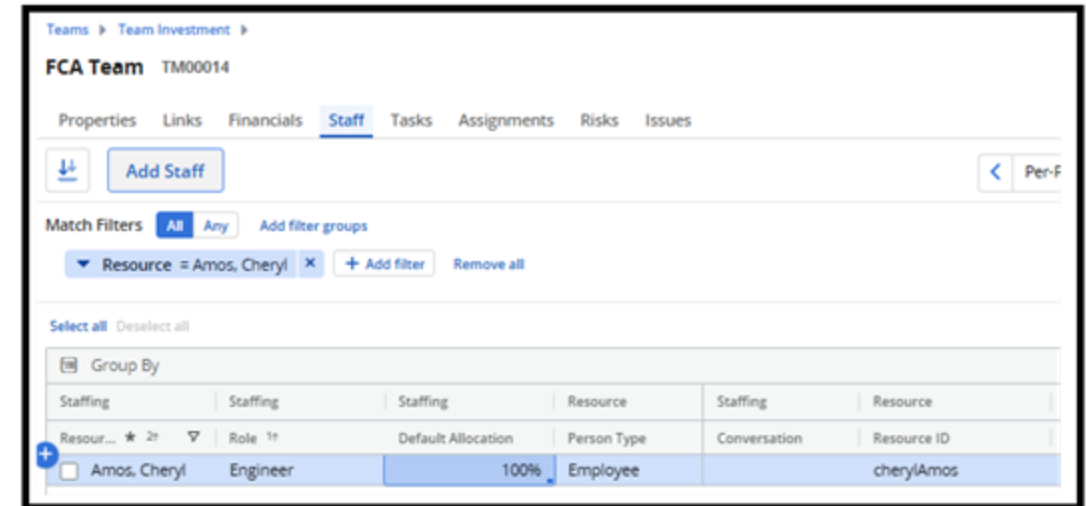
# FCA: Administration Settings and Enabling

## Team Investments

### ❖ Step 10:

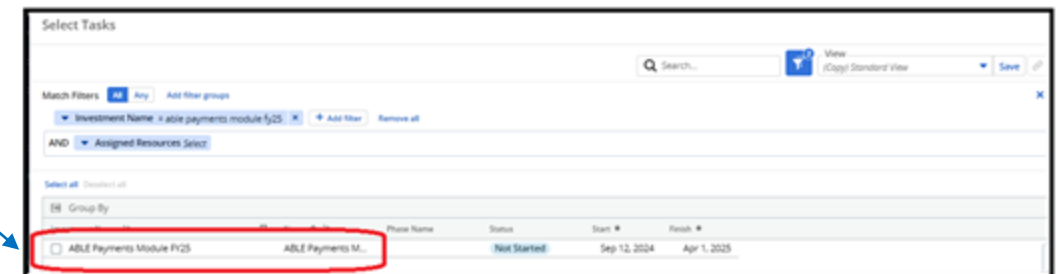
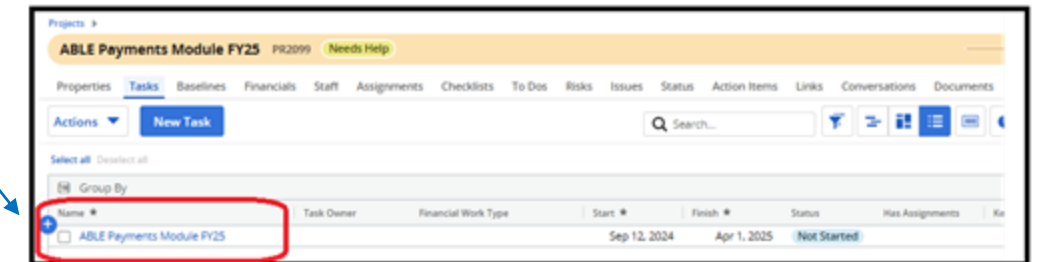
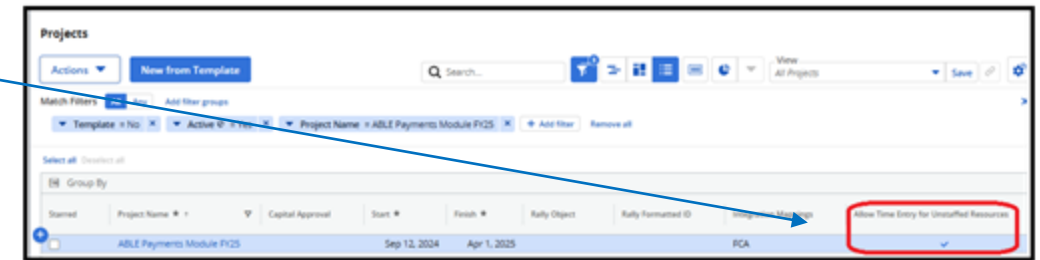
#### • Inside your team type investment

- Add an active Resource to the Team with 'Open for Time Entry' enabled and 'Track Mode' as 'PPM'
- Resource must have a non-zero allocation for time period for which you want to populate time entry data
- Resource must also have
  - [Investment] - View All right ([Investment] - View All) for the Capital Actuals investment you identified in Step 5
  - Timesheets - Navigate right.



# 'Allow Time Entry for Unstaffed Resources' flag

- There is now an "Allow Time Entry for Unstaffed Resources" attribute on the Investment object
  - Default value is 'False'
- When the "Allow Time Entry for Unstaffed Resources" attribute is selected for an Investment instance
  - An effort task will be automatically created if there are no existing tasks.
  - There may be other Tasks created in addition to the effort task
  - The Timesheet user will now have this Investment (and Task) available for Time Entry purposes
    - The user does NOT need to be allocated to this investment via the Staff module nor does the user need to have any Assignments



# The Engine of Frictionless Data: The Integration with Rally

# FCA: How It Works

## ❖ Synchronize Your Features:

- From Classic, execute '**Synchronize Mapped Information**' job to synchronize all configured data
- The 'Rally Object' and 'Rally Formatted ID' fields are updated in the Investment workspace (e.g. Epic, Project, Feature)
- Basically, you need to synchronize the **INVESTMENT** level for your capital actuals investment **BEFORE** you can calculate the automated time.

The image shows two screenshots from a software interface. The top screenshot is the 'Job Type: Synchronize Mapped Information - Job Properties' configuration page. It has sections for 'General', 'Parameters', and 'When'. In the 'Parameters' section, 'Integration Mapping' is set to 'FCA'. In the 'When' section, 'When' is checked, 'Immediately' is selected, and 'Recurrence' is set to 'Run Once'. A blue arrow points from the 'Synchronize Mapped Information' job name in the list to the 'Integration Mapping' field. Another blue arrow points from the 'Rally Object' and 'Rally Formatted ID' columns in the table below to the 'When' section.

The bottom screenshot shows a table of data with the following columns: 'Starred', 'Project Name', 'Capital Approval', 'Start', 'Finish', 'Rally Object', 'Rally Formatted ID', and 'Integration Mappings'. The first row of data is for 'ABLE Payments Module FY25' with a 'Rally Object' of '819338544155' and a 'Rally Formatted ID' of 'F21371'. These two cells are highlighted with a red rectangle. A blue arrow points from the 'When' section of the top screenshot to this red rectangle.

| Starred                  | Project Name              | Capital Approval | Start        | Finish      | Rally Object | Rally Formatted ID | Integration Mappings |
|--------------------------|---------------------------|------------------|--------------|-------------|--------------|--------------------|----------------------|
| <input type="checkbox"/> | ABLE Payments Module FY25 |                  | Sep 12, 2024 | Apr 1, 2025 | 819338544155 | F21371             | FCA                  |

# FCA: How It Works

## ❖ Teams Do Their Work:

- In the Rally workspace (or integrated from Jira)
  - Work items (user stories & defects) will be included in the calculation for a team IF
    - The schedule State was In-Progress at any point during the time period requested
    - There is a points estimate attached
    - A Financial Work Type has been identified
    - The requested team is identified as the owner via the Project field (in Rally)
      - If the job in the next step is run without specifying a team, then all teams with a Rally Project associated will be processed

| F21371 ABLE Payments Module FY25                                    |                  |             |                |               |                  |                         |                     |  |  |
|---------------------------------------------------------------------|------------------|-------------|----------------|---------------|------------------|-------------------------|---------------------|--|--|
| User Stories                                                        |                  |             |                |               |                  |                         |                     |  |  |
| Saved Views: Select or Add Saved and Shared Views                   |                  |             |                |               |                  |                         |                     |  |  |
| Search Work Items: + Add New Link Existing Show Filters Show Fields |                  |             |                |               |                  |                         |                     |  |  |
| Work Item Types                                                     | Projects         | Name        | Required       | Plan Estimate | Owner            |                         |                     |  |  |
| User Story                                                          | Acme Corporation |             |                |               | Peter Andersson  | Create                  | Create with details |  |  |
| Rank                                                                | ID               | Name        | Schedule State | Plan Estimate | Project          | Financial Work Type     |                     |  |  |
| Totals 8 Points                                                     |                  |             |                |               |                  |                         |                     |  |  |
|                                                                     | US1735           | Development | P              | 5             | Acme Corporation | New Feature Development |                     |  |  |
|                                                                     | US1736           | Issues      | P              | 3             | Acme Corporation | Defect                  |                     |  |  |

# FCA: How It Works

## ❖ Calculate Actuals

- In Classic, execute the 'Timesheet Integration' job for your desired Integration and Time Period
  - You can also optionally select specific Teams
- Tasks based on the Financial Work Types and the associated effort will be created/updated on the corresponding capital actuals investment (e.g. Feature)

### Job Type: Timesheet Integration - Job Properties

#### General

☐ JOB NAME  
Timesheet Integration

#### Parameters

☐ INTEGRATION TYPE  
Rally

☐ TIME PERIOD  
Current Period

#### TEAM INVESTMENTS

AI Team

Blackhawks Team

[SAVE PARAMETERS](#)

### Timesheets

My Timesheet | Review & Approve | Timesheets

Cheryl Amos  
Engineer

Select Resource

Time Period: Feb 3 2025 - Feb 9 2025 | Status: Open

HOURS: 40.00 / 40.00 | PROJECT TIME: 100%

Submit

Collapse all | Add Tasks | Remove Tasks

| Name                               | Input Type Code | Charge Code | Mon. 3 | Tue. 4 | Wed. 5 | Thu. 6 | Fri. 7 | Sat. 8 | Sun. 9 | Total |
|------------------------------------|-----------------|-------------|--------|--------|--------|--------|--------|--------|--------|-------|
| ABLE Payments Module FY25 (PR2099) |                 |             |        |        |        |        |        |        |        |       |
| Defect (defect)                    | Billable        | Management  | 3.00   | 3.00   | 3.00   | 3.00   | 3.00   |        |        | 15.00 |
| New Feature Development (NFD)      | Billable        | Management  | 5.00   | 5.00   | 5.00   | 5.00   | 5.00   |        |        | 25.00 |

# "But My Teams Use Jira..." The Path to Full Visibility



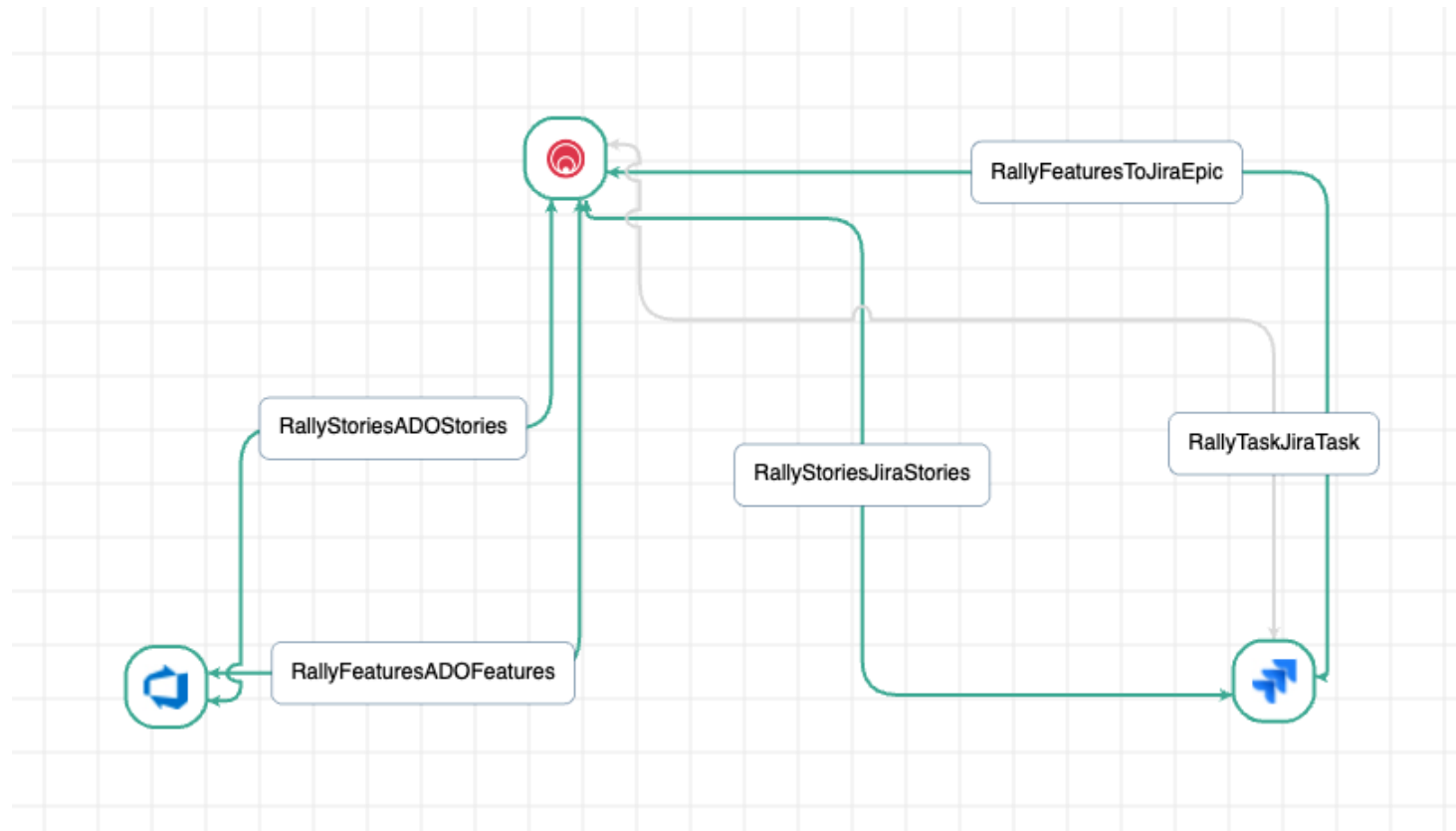
# Rally Brings More to the Equation

Rally provides capabilities Jira can't without intensive customization, including:

- Audit-grade lockdown: Jira does not provide a governed lock on work records tied to depreciation events that Rally does
- Lower audit risk: Without Rally's audit trail, evidence can drift without controlled immutability of execution data
- Reduced data replication: Clarity would need to retain full work histories to preserve an audit trail without Rally's historical reporting
- Reduced exceptions and manual processes: more reconciliations and manual checks would be needed to keep data accurate
- Rally adds the missing controls: calculation logic, system-of-record role, and post-depreciation lockdown

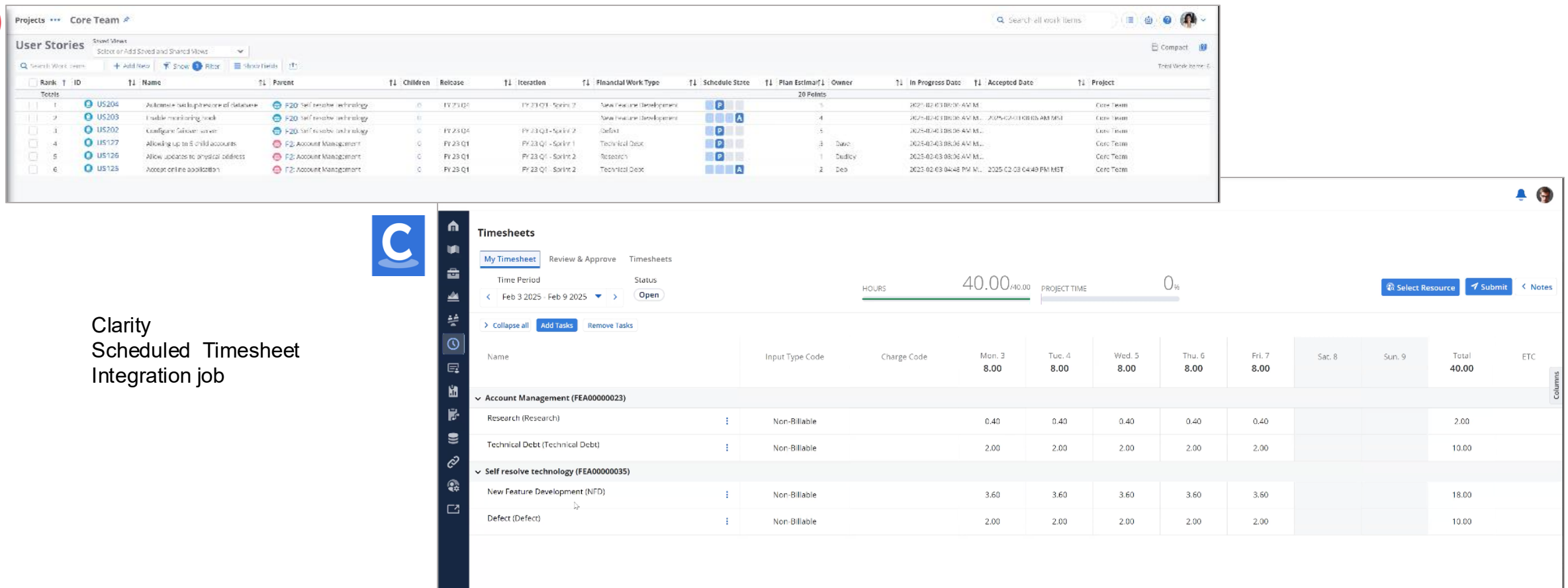
# ConnectALL Allows for Seamless Data Flow

Teams do not have to change their processes or tooling to achieve automation.



# Data flow is seamless between Rally & Clarity

Auto-generated timesheet for teams based on financial work type breakdown



The image displays two screenshots illustrating the seamless data flow between Rally and Clarity. The top screenshot shows the Rally 'User Stories' view for the 'Core Team' project. It lists several user stories with their details, including parent/child relationships, release cycles, iterations, financial work types, and schedule status. The bottom screenshot shows the Clarity 'Timesheets' view for the same project, displaying a scheduled timesheet for the period of February 3, 2025, to February 9, 2025. The timesheet shows a total of 40.00 hours, broken down by task and resource.

**Rally User Stories Data:**

| Rank | ID    | Name                                 | Parent                      | Children | Release  | Iteration           | Financial Work Type     | Schedule State | Plan Estimate | Owner  | In Progress Date        | Accepted Date           | Project   |
|------|-------|--------------------------------------|-----------------------------|----------|----------|---------------------|-------------------------|----------------|---------------|--------|-------------------------|-------------------------|-----------|
| 1    | US204 | Automatic backup/restore of database | F20 Self resolve technology |          | PY 23 Q1 | PY 23 Q1 - Sprint 2 | New Feature Development | P              | 5             |        | 2025-02-03 08:00 AM MST |                         | Core Team |
| 2    | US203 | Enable monitoring tool               | F20 Self resolve technology |          | PY 23 Q1 | PY 23 Q1 - Sprint 2 | New Feature Development | A              | 4             |        | 2025-02-03 08:00 AM MST |                         | Core Team |
| 3    | US202 | Configure Gateway server             | F20 Self resolve technology |          | PY 23 Q1 | PY 23 Q1 - Sprint 2 | Defect                  | P              | 5             |        | 2025-02-03 08:00 AM MST |                         | Core Team |
| 4    | US177 | Allowing up to 5 child accounts      | F20 Account Management      |          | PY 23 Q1 | PY 23 Q1 - Sprint 1 | Technical Debt          | P              | 3             | Devo   | 2025-02-03 08:00 AM MST |                         | Core Team |
| 5    | US126 | Allow updates to physical address    | F20 Account Management      |          | PY 23 Q1 | PY 23 Q1 - Sprint 2 | Research                | P              | 1             | Dudley | 2025-02-03 08:00 AM MST |                         | Core Team |
| 6    | US125 | Accept online application            | F20 Account Management      |          | PY 23 Q1 | PY 23 Q1 - Sprint 2 | Technical Debt          | A              | 2             | Devo   | 2025-02-03 04:48 PM MST | 2025-02-03 04:48 PM MST | Core Team |

**Clarity Timesheets Data:**

| Name                                         | Input Type Code | Charge Code  | Mon. 3 | Tue. 4 | Wed. 5 | Thu. 6 | Fri. 7 | Sat. 8 | Sun. 9 | Total | ETC |
|----------------------------------------------|-----------------|--------------|--------|--------|--------|--------|--------|--------|--------|-------|-----|
| <b>Account Management (FEA00000023)</b>      |                 |              |        |        |        |        |        |        |        |       |     |
| Research (Research)                          |                 | Non-Billable | 0.40   | 0.40   | 0.40   | 0.40   | 0.40   |        |        | 2.00  |     |
| Technical Debt (Technical Debt)              |                 | Non-Billable | 2.00   | 2.00   | 2.00   | 2.00   | 2.00   |        |        | 10.00 |     |
| <b>Self resolve technology (FEA00000035)</b> |                 |              |        |        |        |        |        |        |        |       |     |
| New Feature Development (NFD)                |                 | Non-Billable | 3.60   | 3.60   | 3.60   | 3.60   | 3.60   |        |        | 18.00 |     |
| Defect (Defect)                              |                 | Non-Billable | 2.00   | 2.00   | 2.00   | 2.00   | 2.00   |        |        | 10.00 |     |

### Teams included in the request

Download the API request and response

# Work Rules-driven Portfolio Item Hierarchical “Lockdown”

- Portfolio Item hierarchical “Lockdown” when Clarity investments are ready for capitalization

- Prevent material changes based on a set of conditions
- Prevent adding new work items to the portfolio items or children

**Work rule name**

Portfolio Item Lockdown

This name will also be used as the error message when the rule has been broken

**Applies to**

This project only

**The rule affects**

Portfolio Items

**When the artifact type is**

Initiative

**If the following condition(s) are met**

| Field        | Operator | Value |
|--------------|----------|-------|
| Demonstrated | =        | Yes   |

[Add](#)

**Then**

Lock down

If the above condition is true, the artifact type and its children will be locked

**Make fields read only**

Initiative [Show Fields](#)

Feature [Show Fields](#)

User Story [Show Fields](#)

Defect [Show Fields](#)

# Additional Reporting Benefits

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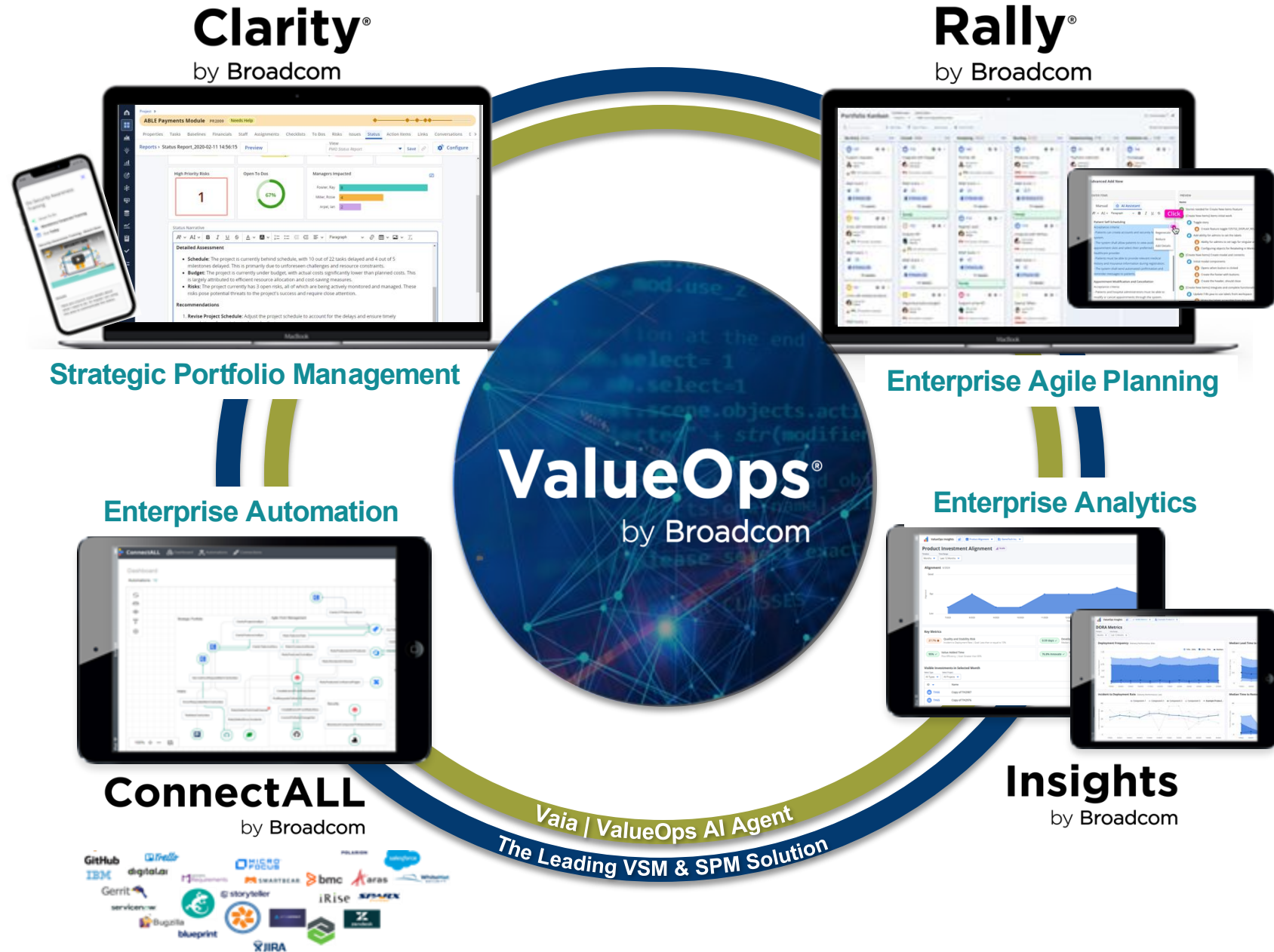
- Out of the box flow metrics
- Team, program, and enterprise dashboards
- Bottleneck identification
- Dependency management

All without disrupting current team processes or tooling

# What To Do Next

# Unlock Your Full Potential with ValueOps

Learn more about the Platform Advantage!



# Questions?



# Thank You For Attending Rego University

## Instructions for PMI credits

- Access your account at [pmi.org](https://pmi.org)
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- 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.



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### Website

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