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The Power of the Page: Next-Gen Reporting in Clarity

Your Guides:

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What a Beautiful Tree!



What a Beautiful Tree!



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Agenda

- Clarity's New Native Reporting is...?
- Getting Data out/Unlocking Deeper Insights
- Effective Report Distribution
- How does Clarity native reporting work?
- Highlights of Clarity native reporting
- Future Insights – We are not done
- Three Key take aways

Clarity's NEW *Native Reporting* is...



Optimized reporting solution that helps to deliver information 'instantaneously'



User friendly configuration to create deliverables for stakeholder consumption



Foundation for platform visibility for improving the enterprise reporting needs



Tagged for innovation...We are not done



Getting Data Out: Quick & Easy Grid Extracts

Focus on the data

Flexibility Users can easily sort, filter, and manipulate the data according to their specific needs.

Offline Access making data available even without an internet connection. This is useful for analysis, research, and offline presentations.

Data Integration easily imported into other applications, such as spreadsheets, databases, and data visualization tools, facilitating data integration and analysis across different platforms.

[illegible]

Yes(!), you can easily create large Data Extract reports

clarity

Reporting ▸ Report Designer ▾

Investment Data Extract

Published: Jul 31, 2025 10:17 am

Preview

Filters

Investment Cost and Benefit

Investment				Aug 2025		Sep 2025		Totals	
Name ↑ ★	Manager	Work Status	Goal	Planned Cost	Planned Benefit	Planned Cost	Planned Benefit	Planned Cost	Planned Benefit
Total				2,254,938.88	1,358,278.96	2,251,250.43	1,354,786.09	4,506,189.32	2,713,065.05
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ABLE Payments Digi...	Arpel, Ian	Active	Infrastructure Impr...	483,887.83	150,000.00	505,584.35	150,000.00	989,472.17	300,000.00
ABLE Payments Digi...	Arpel, Ian	Active	Infrastructure Impr...	483,887.83	150,000.00	505,584.35	150,000.00	989,472.17	300,000.00
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ABLE Payments Mo...	Morris, Tom	Active	Grow the Business	18,195.65	0.00	17,608.70	0.00	35,804.	

Extract up to
250,000 rows!

Run this anytime – no need to wait for a Data Warehouse sync.

CSV Format

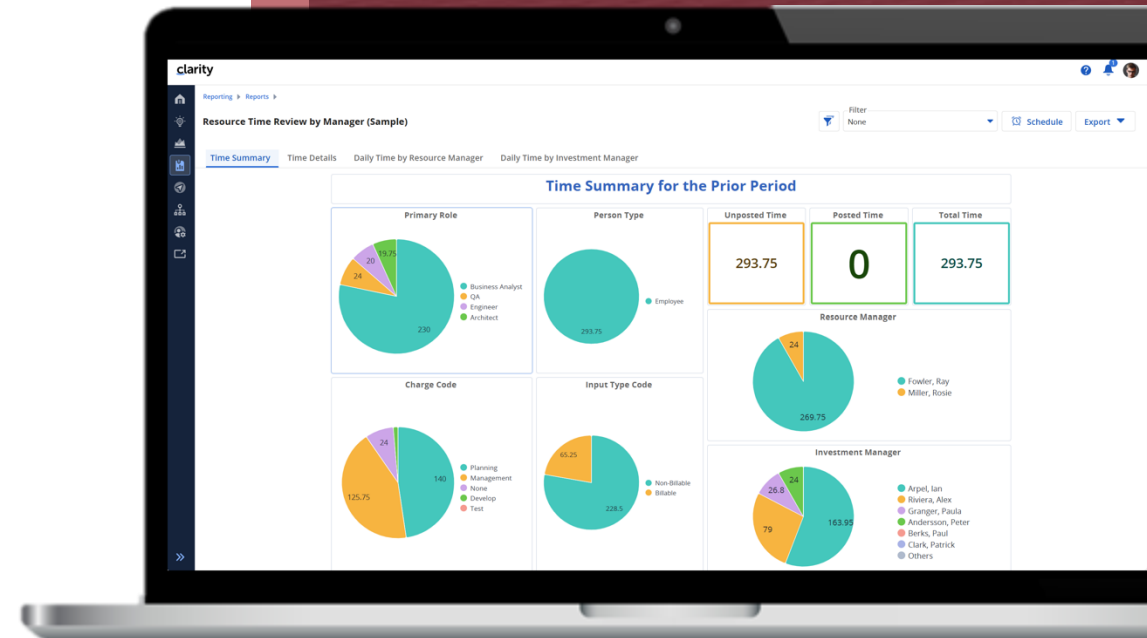
Unlocking Deeper Insights: A Rich Clarity Report Example

Focus on the visuals

Widgets pie charts/bar charts/tables/attributes/text box/lines, images, and 'links' provide multiple avenues to display the data in an easily consumable format

Drill Down to further details in a single click without having to filter the information

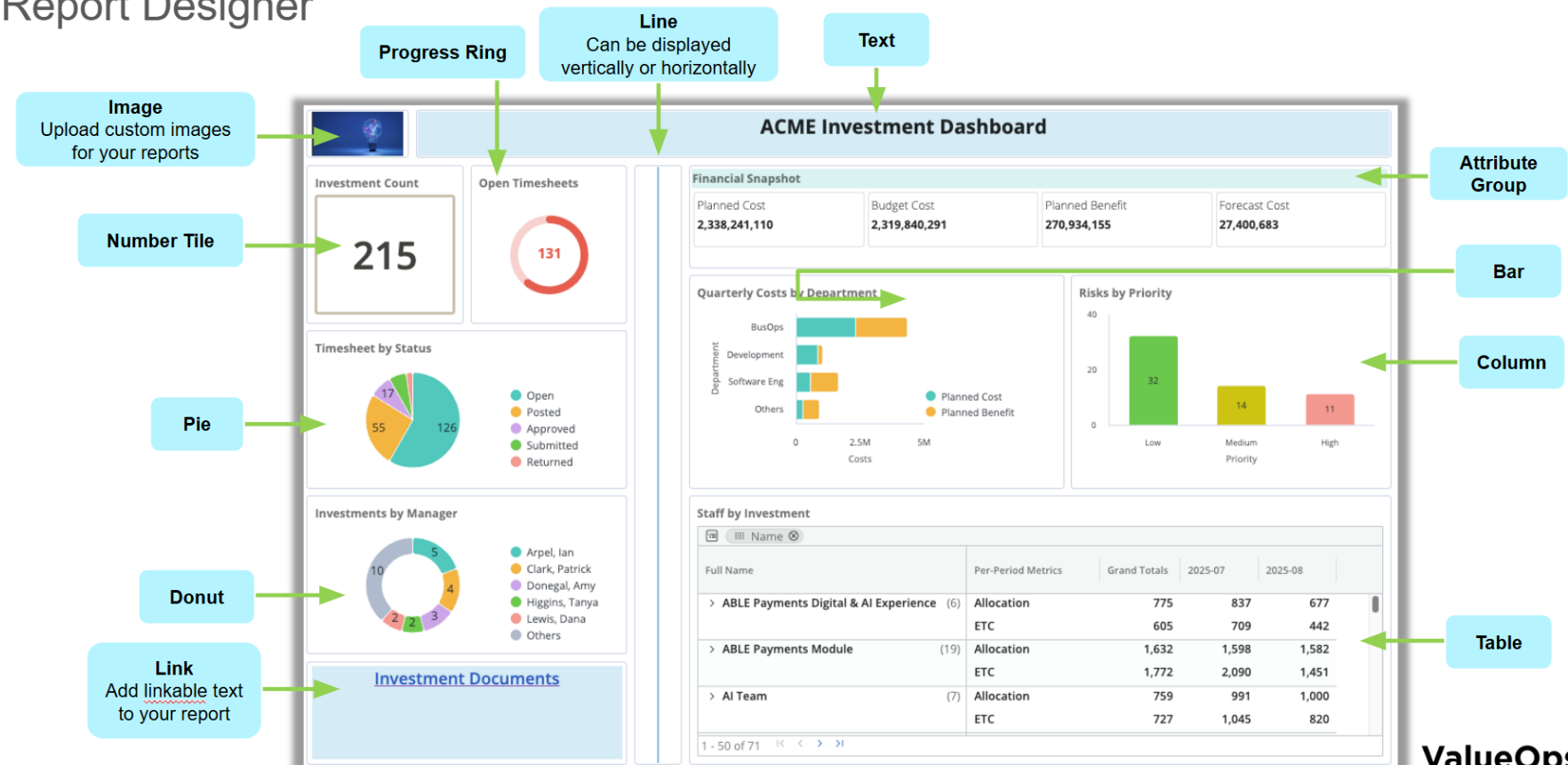
Tabular extend your report to multiple tabs to provide more insights into the data that interests you and your stakeholders



Unlocking Deeper Insights: A Rich Clarity Report Example

Charts, Tables and Other Widgets (1/3)

Report Designer



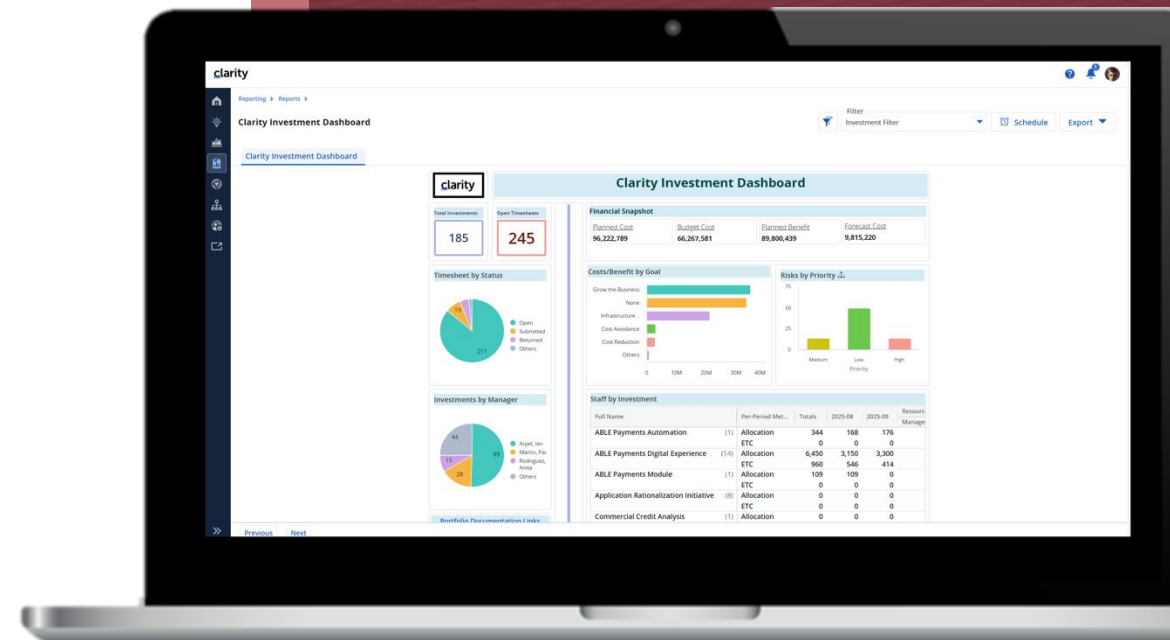
Effective Report Distribution Strategies Sharing Your Clarity Insights

Focus on the delivery

Schedule recurrence or immediate, reports can configured for delivery via email and/or notification bell

Export user driven export function to drop the report into PPTX/PDF format

Homepage/Menu use the report as a landing spot for end users as they long into the solution or provide as a menu option for easy access



Effective Report Distribution Strategies Sharing Your Clarity Insights

Schedule Report: Clarity Investment Dash... Schedule * Clarity Investment Dashboard

Schedule Filter Export Share Email Notify

* Run On Sep 2, 2025 at 5:09 PM

Enable Recurrence

Repeat Every Week

Repeat On*

☐ All ☒ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Ends

☒ Never ☐ On a Date

Schedule it!

Schedule Report: Clarity Investment Dash... Schedule * Clarity Investment Dashboard

Schedule Filter Export Share Email Notify

Formats*

☒ PDF ☐ PPTX

Language *

English

Locale *

English(United States)

Date Display *

☒ Sep 2, 2025 ☐ 9/2/25

Unit of Measure *

☐ FTE ☒ Hours ☐ Days ☐ % Availability

Export it!

Schedule Report: Clarity Investment Dash... Schedule * Clarity Investment Dashboard

Schedule Filter Export Share Email Notify

The report will be available as a notification (bell icon) and in the Reports Library.

Add People Add Groups

Search...

Clear selected

☐ Amos, Cheryl
cherylAmos@example.com

☐ Andersson, Peter
peterandersson@example.com

☐ Arpel, Ian
ClaritySolutionEngr@gmail.com

☐ Awad, Rashid
rashidawad@example.com

☐ Baker, Isaac
issacBaker@example.com

Share it!

Schedule Report: Clarity Investment Dash... Schedule * Clarity Investment Dashboard

Schedule Filter Export Share Email Notify

To: danalewis.clarity@gmail.com CC BCC

Subject Here is your Monday morning report.

Message

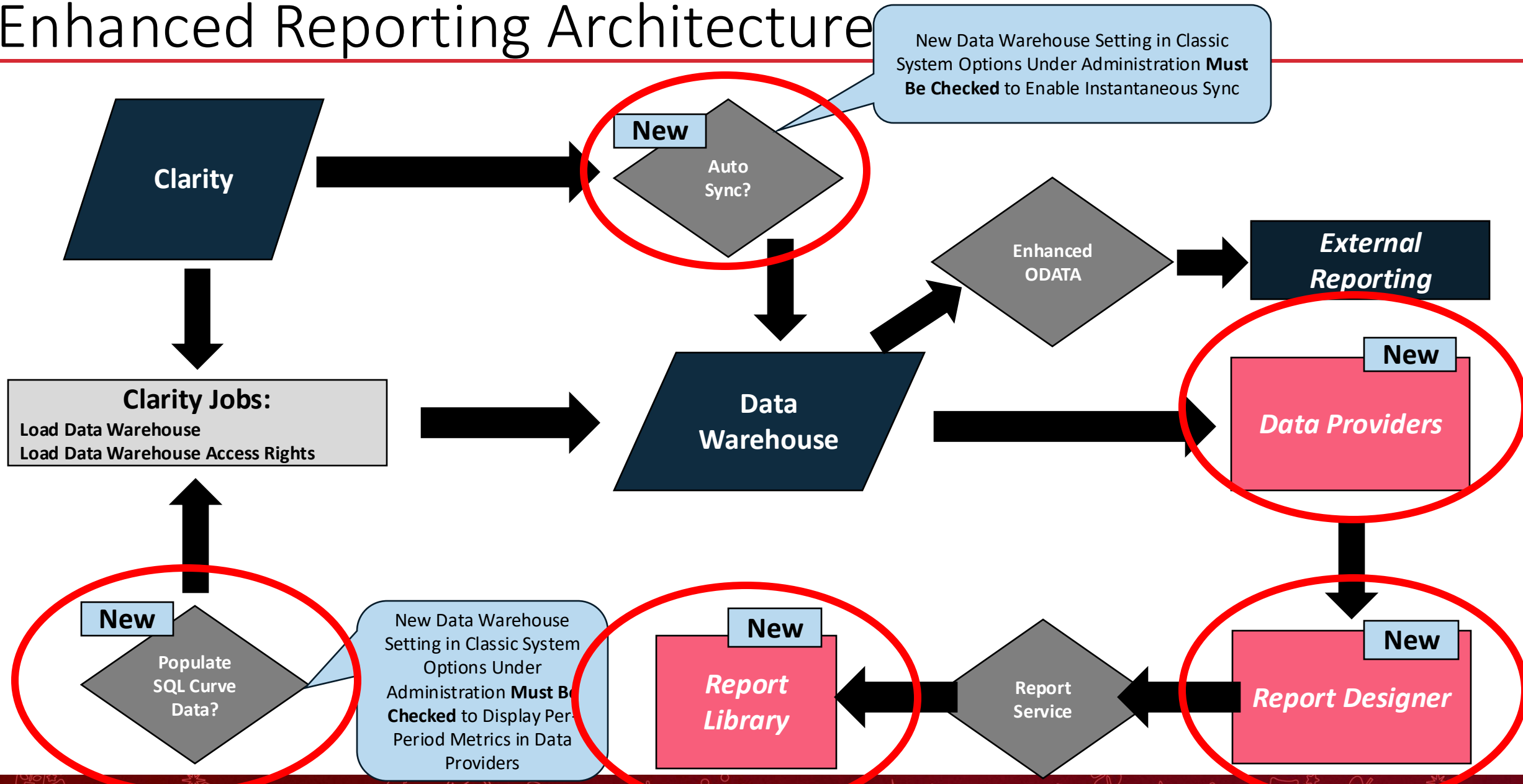
Please find the attached PDF with your portfolio's investment details.
If you have any questions, please contact your administrator.

Attachments

☒ Report as attachment ☒ Add Reports Library link

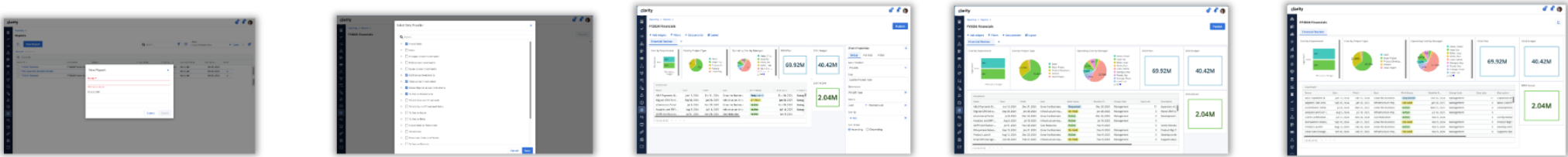
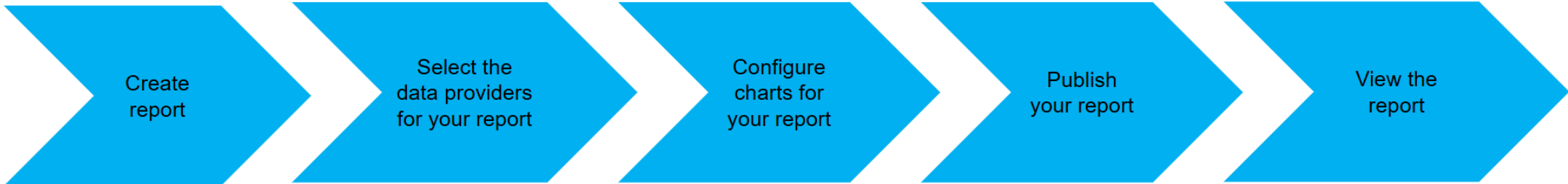
Email it!

Enhanced Reporting Architecture



Report Designer Flow

Report Designer

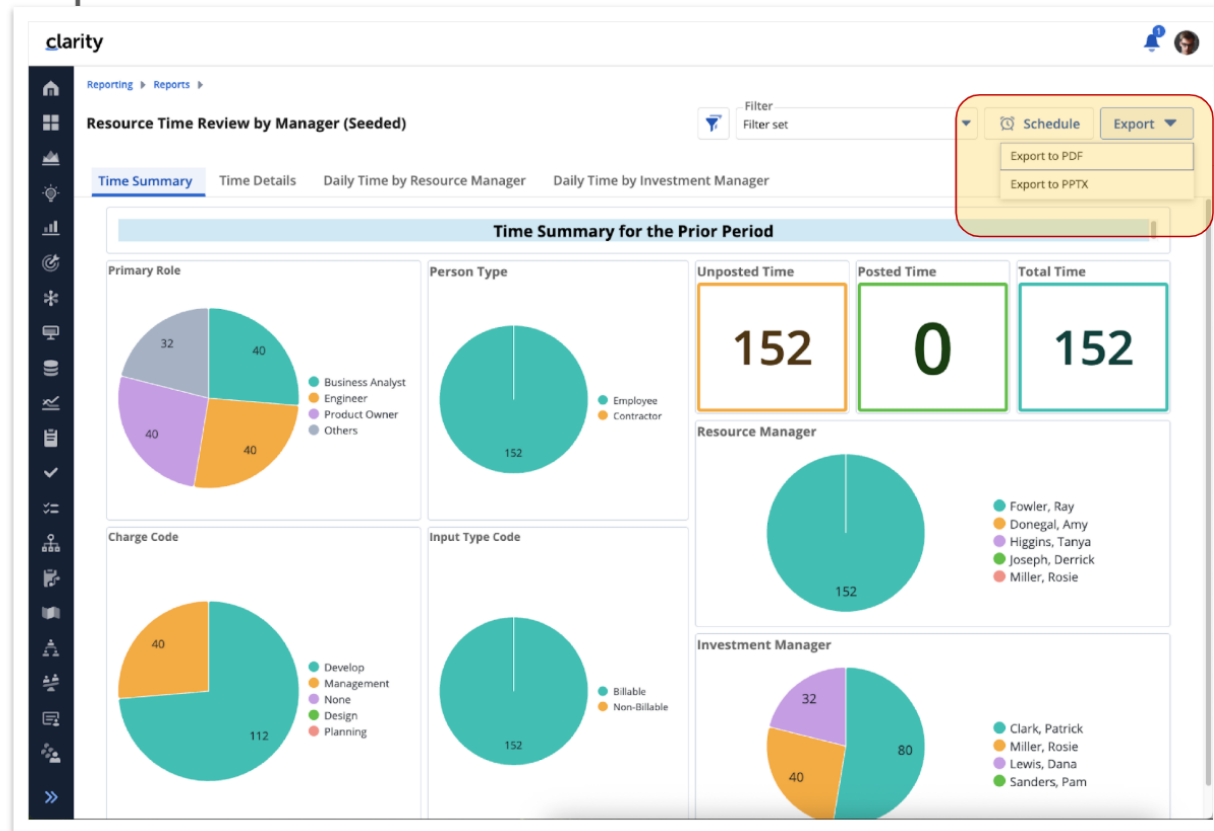


Highlights of Clarity Native Reporting

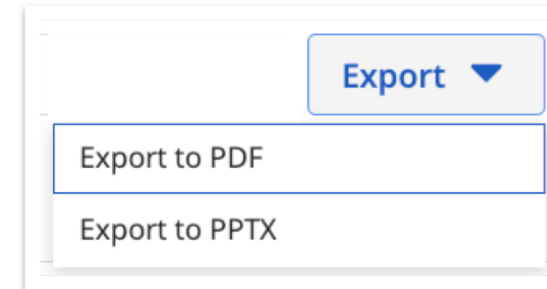


What's changed?

Export to PDF or PPTX formats



Export available for
Fixed layout format

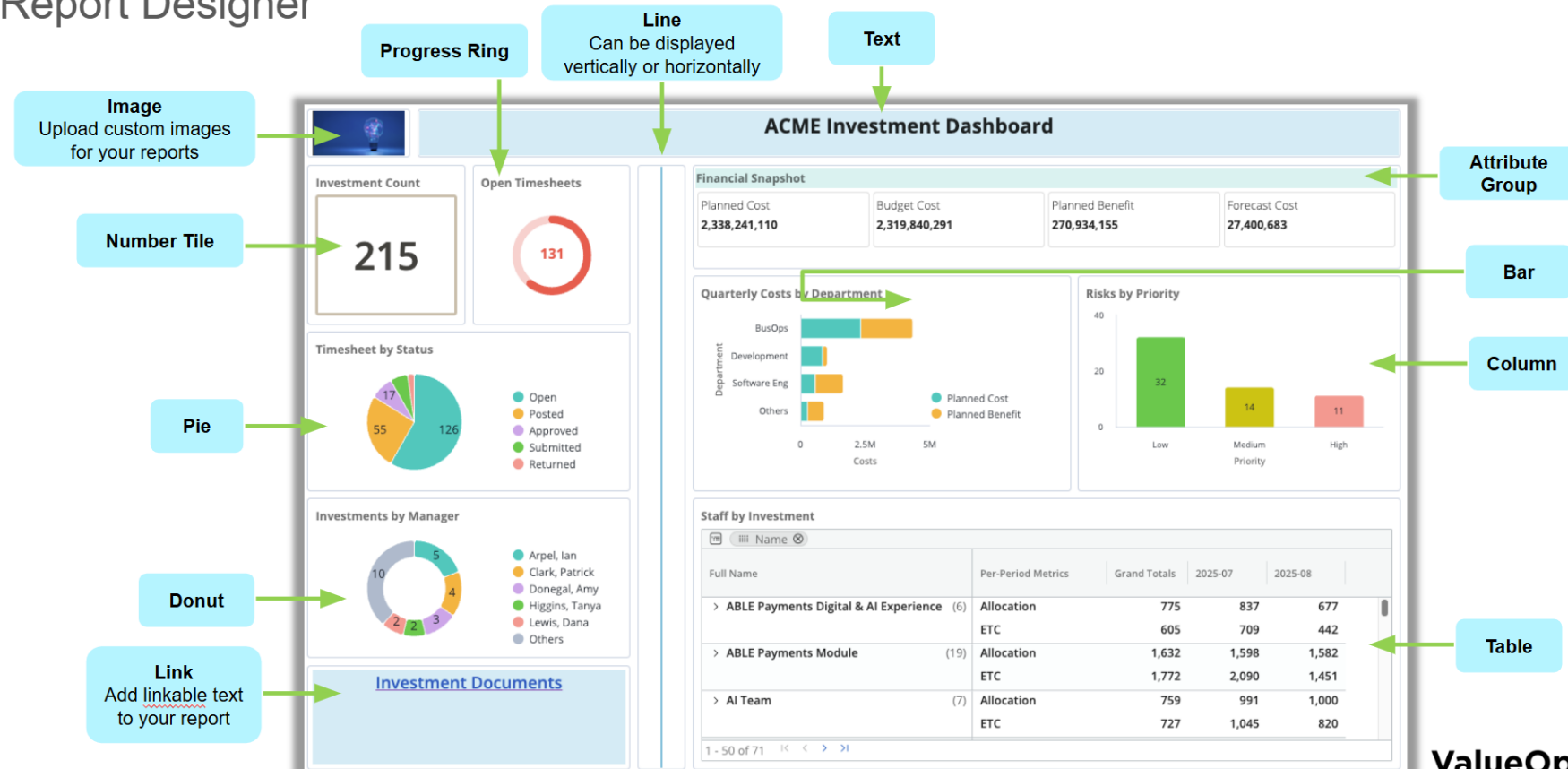


- The 'Export to PPTX' button has changed to 'Export' with PDF and PPTX options
 - Applies to Report Viewer
 - Applies to Report Designer -> Preview

Report viewer – Fixed layout format

Charts, Tables and Other Widgets (1/3)

Report Designer



Report Designer – Report-Level Filtering

Report Designer

The screenshot displays the Clarity Report Designer interface for a 'Project Financial Dashboard'. The dashboard includes several widgets: 'FY25 Planned' (50.08M), 'Cost by Project Type' (50.08M), 'FY25 Actuals' (87.76K), 'Cost vs Benefit by Department', and 'Actual Costs by Sponsor'. The 'Report-level filters' panel on the right shows a filter for 'Major Projects' with options to 'Show filters in the Report' and 'Allow adding/removing in the Report'. A dropdown menu for 'Project Type (Project) = Major Project' is open, showing options: 'Hide', 'Lock', 'Required', and 'Delete'. The 'Apply' button is at the bottom right of the filter panel.

Report-Level Filters apply to all widgets, across all tabs in the report.

Displays report-level filters when viewing the report.

Filter parameters are auto-saved even if the do not click "Apply". Filter parameters can be configured with no value to allow end-users to select the filter value.

Allow end-users to add/remove filter and/or parameters.

Designers can create saved filters so end-users can just select and apply when viewing a report.

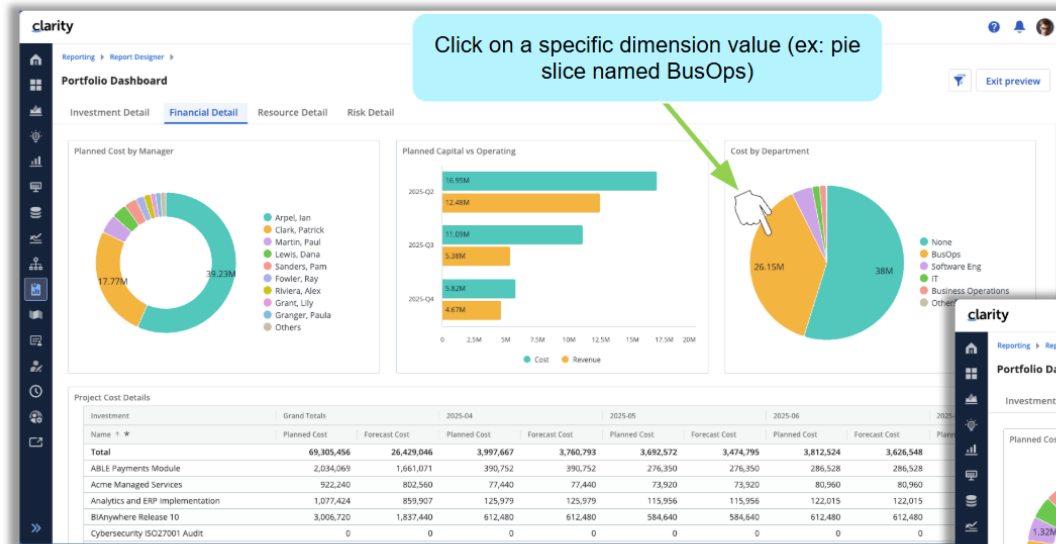
Clicking the three-dot menu, you can Hide, Lock or Require report-level filter attributes when viewing the report.

Click the "Apply" button will commit the filter and will refresh the widgets with the filtered results.

Interactive Filtering

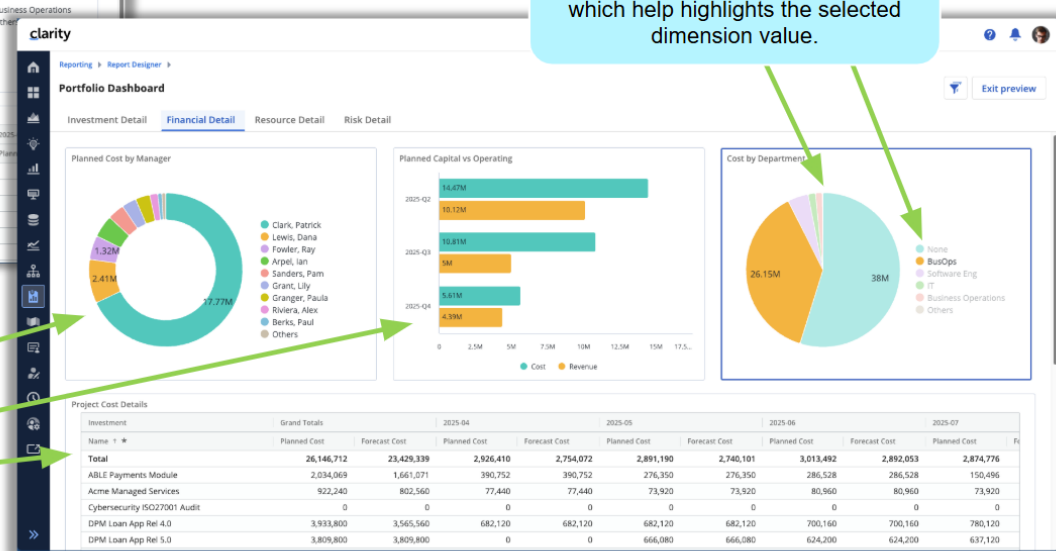
Report Designer

BEFORE



Interactive Filtering allow users to select a specific dimension value on a widget and other widgets will be filter by that dimension value.

AFTER



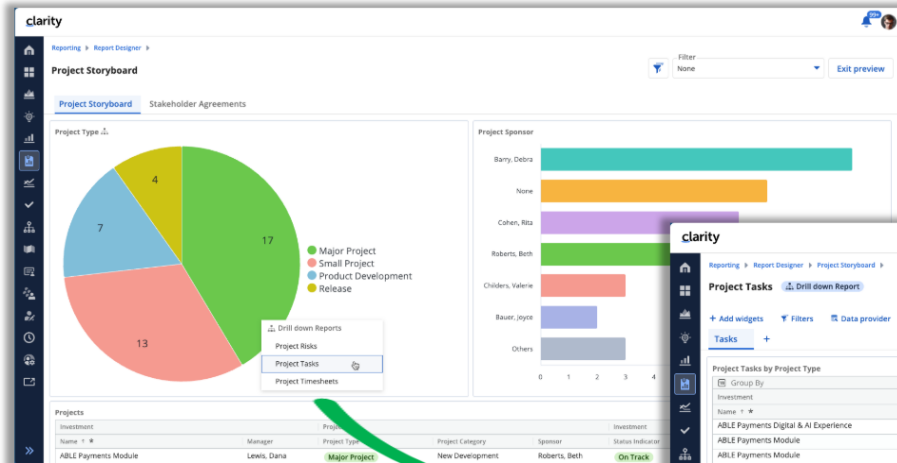
Other widgets will be filtered based on the dimension value selected.

Drill-Down Reports

Report Designer

Drill-down Reports allow you to right-click on a widget dimension and pass dimension filter to another report

Top-Level Report



Drill-Down Report

The Drill-Down Report displays a table of 'Project Tasks by Project Type' and a 'Tasks by Status' donut chart. The table lists tasks for 'ABLE Payments Digital & AI Experience' with columns for Name, Project Type, Task, Status, and Task Owner.

Name	Project Type	Task	Status	Task Owner
ABLE Payments Digital & AI Experience		ABLE Payments Digital & AI Experience	Not Started	
ABLE Payments Module	Major Project	Planning Phase	Started	Berry, Jason
ABLE Payments Module	Major Project	Define Scope Change and Control Process	Started	Quinn, Randy
ABLE Payments Module	Major Project	Risk Response and Mitigation Plan	Started	Roberts, Beth
ABLE Payments Module	Major Project	Functional and Technical Design	Started	Quinn, Randy
ABLE Payments Module	Major Project	Complete Project Plan	Started	Lewis, Dana
ABLE Payments Module	Major Project	Planning Phase Gate Complete	Not Started	
ABLE Payments Module	Major Project	Construction Phase	Not Started	Berry, Jason
ABLE Payments Module	Major Project	Database Development	Started	Stoneburg, Si
ABLE Payments Module	Major Project	User Interface Development	Started	Berry, Jason
ABLE Payments Module	Major Project	Unit and Performance Testing	Not Started	Lewis, Dana
ABLE Payments Module	Major Project	Construction Phase Gate Complete	Not Started	
ABLE Payments Module	Major Project	Deployment and Quality Phase	Not Started	Garcia, Alex
ABLE Payments Module	Major Project	Functional and System Testing	Not Started	Stoneburg, Si
ABLE Payments Module	Major Project	Usability and User Acceptance Testing	Not Started	Lewis, Dana
ABLE Payments Module	Major Project	Deployment Phase Gate Complete	Not Started	
ABLE Payments Module	Major Project	Closing Phase	Not Started	Lewis, Dana
ABLE Payments Module	Major Project	Lessons Learned	Not Started	Lewis, Dana
ABLE Payments Module	Major Project	Closing Phase Gate Complete	Not Started	Lewis, Dana

The 'Tasks by Status' donut chart shows the following data:

Status	Count
Not Started	16
Started	14
Completed	9

Why is our native reporting tool approach Cool? (1 of 2)



Leveraging the Clarity Data Providers to enhance **Data Governance** - this enables further data governance based upon your Clarity permission structure – IOW: People who should not see M&A information in an AI response will not.



Reporting against real-time data – Reports are now updated in real-time! No more having to wait 30-mins for your project status report to update!



Why is our native reporting tool approach Cool? (2 of 2)



We can do things that off shelf reporting can't! - We know our data! Example: Using the Clarity OBS to drill down into details - we know the information we are going to pass; BI reporting tools don't.



Foundations for Future Success is being architected to support AI – as you broaden AI capabilities, Clarity's native reporting will most probably support you!

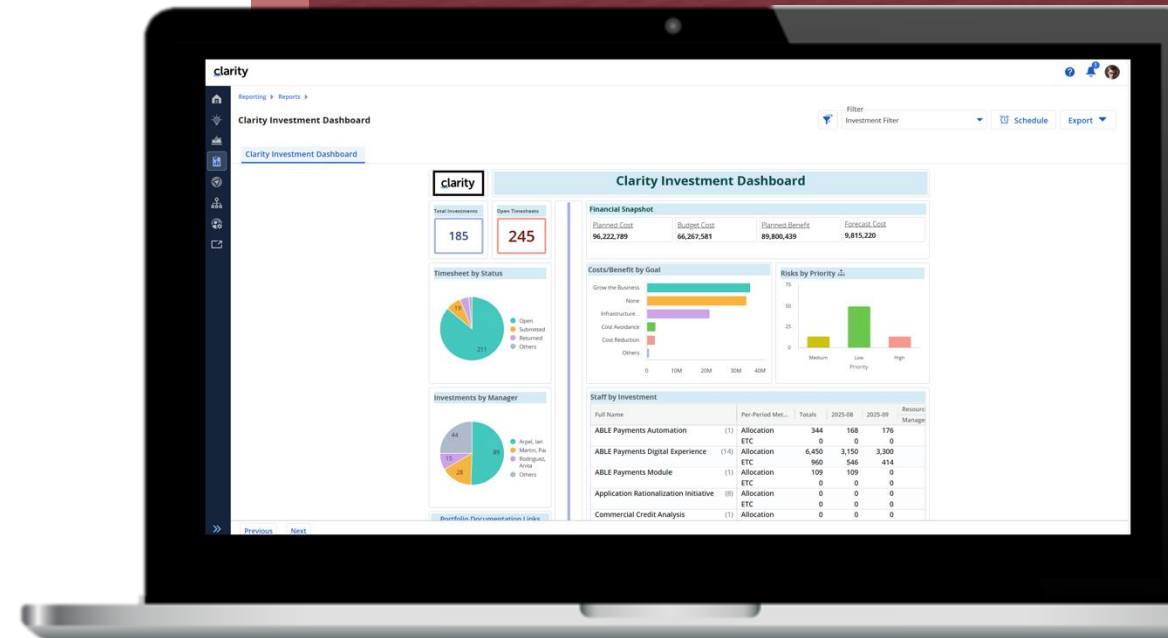


We are not done

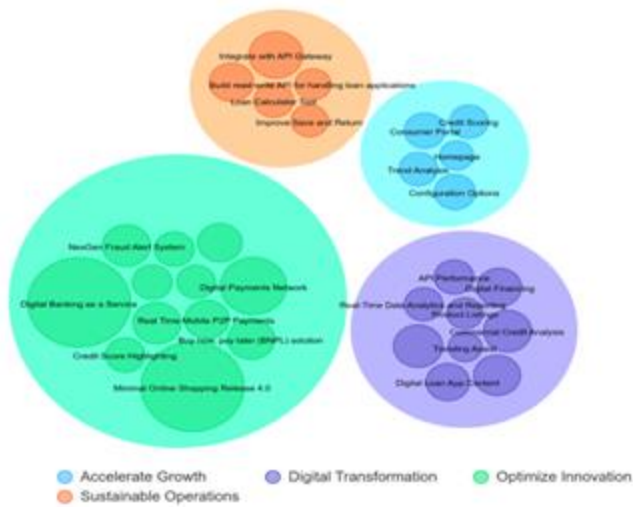
Additional Chart Types continuing to extend additional ways of visualizing your data is crucial; line charts up next

Storytelling providing an easy way to consume the data is crucial to the stakeholders. Let's give you a way to provide a story around what you are seeing

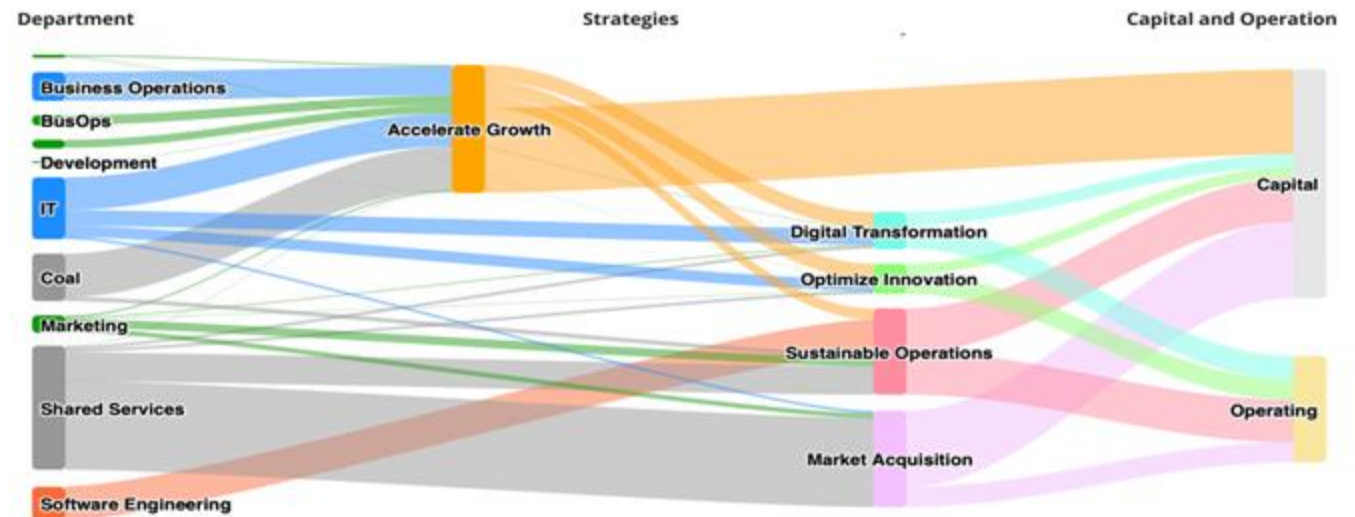
Agents use your data providers to inform your generative AI



Digital Banking Product Line Roadmap



Financial Flows Sankey Diagram



Value Stream Financials

Cost Actuals & Benefit



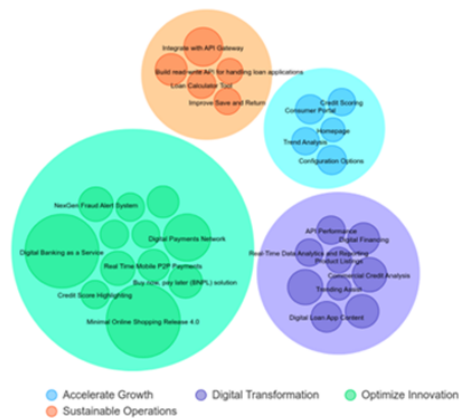
\$9.6M
2023 Plan

\$27.2M

Lean Portfolio Guardrails

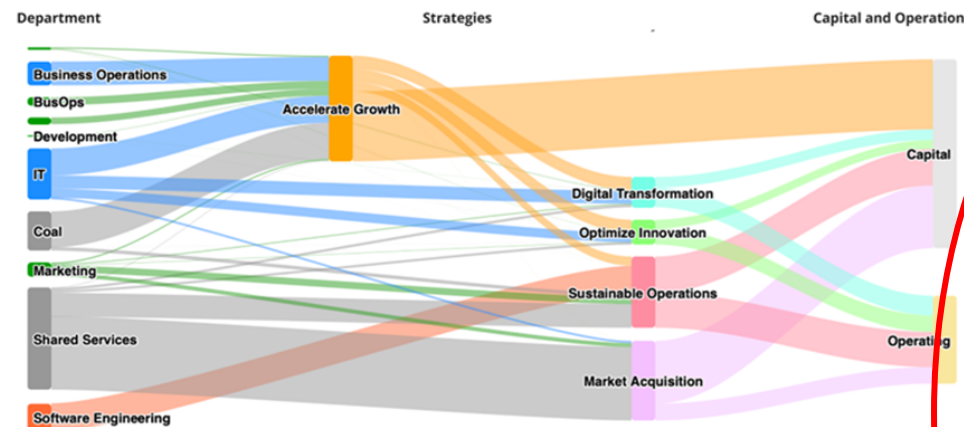


Digital Banking Product Line Roadmap



A1: This chart visualizes the total investment in digital banking AI across different themes (Growth, Transformation, Innovation, Sustainability). Each bubble represents an initiative, with its size reflecting the total investment volume.

Financial Flows Sankey Diagram



A2: This Sankey diagram illustrates the flow of investment dollars from different departments to find the various strategic themes. The width of the flows represents the volume of investment at each stage. It clearly shows the journey from departments to themes and whether those dollars are ultimately CapEx or OpEx.

The Rise of AI-Powered Digital Banking: A Look at Our Investment Trends

Our story begins with a groundbreaking idea: using artificial intelligence to revolutionize digital banking. This year, we're focusing on investments in AI-driven solutions for automating consumer digital banking interactions, a rapidly growing segment of the financial services market.

(Reference chart A1)

As we can see, while overall digital banking AI investment is significant, the Innovation theme stands out, particularly in our Service & Shopping paradigm development. This indicates a growing maturity in these arenas, with increasing numbers of headcount required to keep these platforms stable. Other themes, while attracting considerable attention, haven't yet seen the same level of investment, suggesting they are lower in priority for our organization at the moment.

These promising initiatives are developing cutting-edge technologies, from an entirely autonomous secure payments network to AI-powered platforms that predict fraud. Their success depends not only on the brilliance of the technology but also on navigating the complex regulatory landscape to bring the solutions to consumers.

(Reference Chart A2)

The diagram reveals a compelling narrative. A significant portion of the Market Acquisition funding is currently coming from the Shared Services functions, allowing for significant capitalization of what has historically been an operating cost center. This demonstrates the recognition on the part of that department that their continued success relies on market penetration for our AI-driven digital banking services. We also see that our dedicated innovation allocation, codenamed "Coal" to fuel the fire, has combined with the IT funding to contribute significantly to our Accelerate Growth theme.

Ultimately, these investments fuel the development and deployment of AI-powered digital banking solutions that promise to transform consumer banking. The journey of these investment dollars, from their source to the specific initiatives they support, is a complex one, involving various players and motivations. By understanding this flow through data visualization, we gain a deeper appreciation for the ecosystem that drives innovation within our organization. We also see how the maturity of the platform or initiative, as highlighted in the bubble chart, directly influences the investment from various sources, as shown by the concentration of Shared Services funding in the Market Acquisition theme within the Sankey diagram. This data-driven perspective provides valuable insights into the future of consumer banking and the transformative power of AI.

What's coming?



AI Actions that provides data providers as prompt source



Export/Schedule Enhancements to include responsive report types



Formatting Enhancements for improving the visibility of information in tables



Migration for data providers/report designer



New Daily Reporting Office Hours

- We want to provide you the support you need
- Sessions will focus on the new native reporting capabilities within the solution
 - Come with questions
 - Come with examples
 - 60 minutes daily
- First session will be Monday September 22nd
 - Monday, Wednesday and Friday – 2:00-3:00pm EST
 - Tuesday and Thursday – 10:00-11:00am EST

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

Three Key Take-aways



1. **Exceed expectations** for ease of use, ease of creation, ease of sharing, ease of administration.



2. **Data governance** – data quality, data security, compliance, policies/standards.



3. **Architect for the future** reporting incarnation that highly leverages gems that AI is trending to enable.



Now, go out and find those animals!



Questions?





Master Clarity with Rego University

Earn Certifications in
Administration, Leadership,
and Technical Proficiency

Let Rego be your guide.



Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to introduce our **new certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **Eligibility:** Open to all Rego University attendees



Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

Unlock Your Full Potential with ValueOps

Learn more about the Platform Advantage!



Strategic Portfolio Management



Enterprise Agile Planning

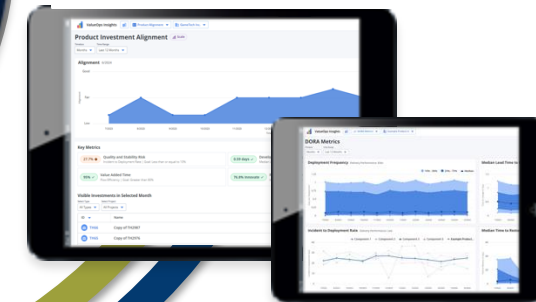
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Thank You For Attending Rego University

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.



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Website

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