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2025

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Clarity Basics

Your Guides:
Chris Ciavarella and Rahul Agrawal

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Introductions

- Where do you work?
- What's your role?
- What area/topic would you like to learn more about?
- Anyone still exclusively on the Classic UI?



Modern UX Components

Getting to know the MUX screens and components



Reviewing the Modern UX (MUX) screen

4

clarity

Clarity

Home

Project Tiles

Projects

Ideas

Investments

Objectives

Pages

Custom Objects

Status Reports

My Workspace

Tasks

To Dos

Hierarchies

Agreements

Collapse

Resources

Roles

Teams

Search...

View
Standard View

Save

Settings

Select all

Deselect all

Group By

	Full Name ↑	Resource ID *	Primary Role	Manager	Person Type	Resource Type
<input type="checkbox"/>	Admin, PMO	csk.admin			Employee	Labor
<input type="checkbox"/>	Admin, Rego	admin2		Admin, User15	Employee	Labor
<input type="checkbox"/>	Admin, User1	AUser01	Business Analyst	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User10	AUser10	Project Manager	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User11	AUser11	Developer	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User12	AUser12	Project Coordina...	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User13	AUser13	Architect	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User14	AUser14		Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User15	AUser15	Architect	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User16	AUser16			Employee	Labor
<input type="checkbox"/>	Admin, User17	AUser17			Employee	Labor
<input type="checkbox"/>	Admin, User18	AUser18			Employee	Labor

1-100 of 248

<>>>

Navigation bar

Reviewing the MUX screen

5

Navigation menu

The screenshot shows the Clarity MUX interface. On the left, a dark blue navigation menu is highlighted with a red box. It contains the following items: Clarity, Home, Project Tiles, Projects, Ideas, Investments, Objectives, Pages, Custom Objects, Status Reports, My Workspace, Tasks, To Dos, Hierarchies, Agreements, and a Collapse button. The main content area is titled 'Resources' and has tabs for Resources, Roles, and Teams. The Resources tab is active. Below the tabs, there is a search bar and a 'View' dropdown set to 'Standard View'. A table of resources is displayed with the following columns: Full Name, Resource ID, Primary Role, Manager, Person Type, and Resource Type. The table contains 18 rows of data, all of which are Employees and Laborers, managed by Joshi, Navdeep. The table is paginated, showing 1-100 of 248 items.

	Full Name ↑	Resource ID *	Primary Role	Manager	Person Type	Resource Type
<input type="checkbox"/>	Admin, PMO	csk.admin			Employee	Labor
<input type="checkbox"/>	Admin, Rego	admin2		Admin, User15	Employee	Labor
<input type="checkbox"/>	Admin, User1	AUser01	Business Analyst	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User10	AUser10	Project Manager	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User11	AUser11	Developer	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User12	AUser12	Project Coordina...	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User13	AUser13	Architect	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User14	AUser14		Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User15	AUser15	Architect	Joshi, Navdeep	Employee	Labor
<input type="checkbox"/>	Admin, User16	AUser16			Employee	Labor
<input type="checkbox"/>	Admin, User17	AUser17			Employee	Labor
<input type="checkbox"/>	Admin, User18	AUser18			Employee	Labor

Top: Navigation Bar



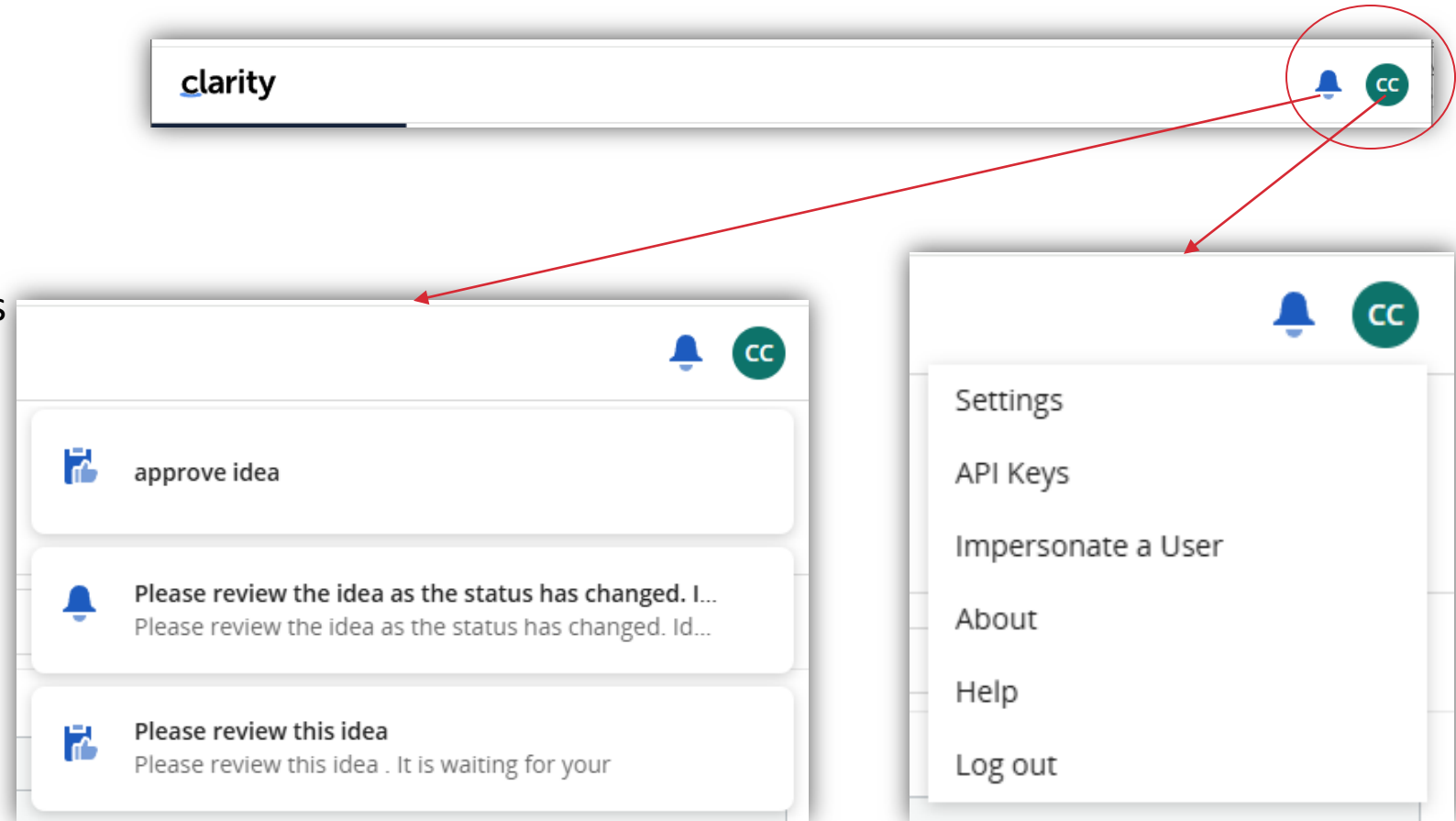
Notifications (Bell icon)

- Simple MUX (configurable) notifications
- Timesheet notifications
- Action Item notifications
- Queued data export notifications with attachments



Personal Menu (Avatar icon)

- Account settings
 - Profile
 - General
 - Notifications
 - Proxy
 - API key generation
- Impersonation (if admin)
- Context Help
- Logout



Left: Navigation Menu



Contains links to major functional areas of Clarity



Is customizable, and can be configured to have links to specific pages

- *Location: Administration -> System Settings -> Navigation Menu*



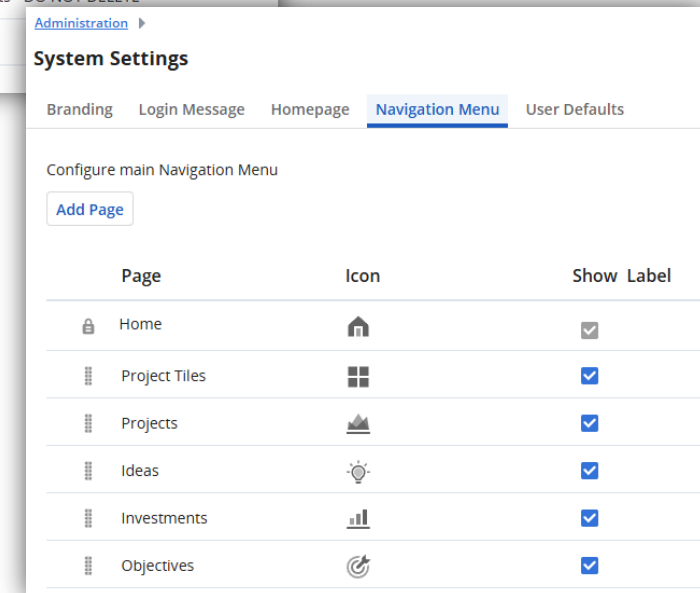
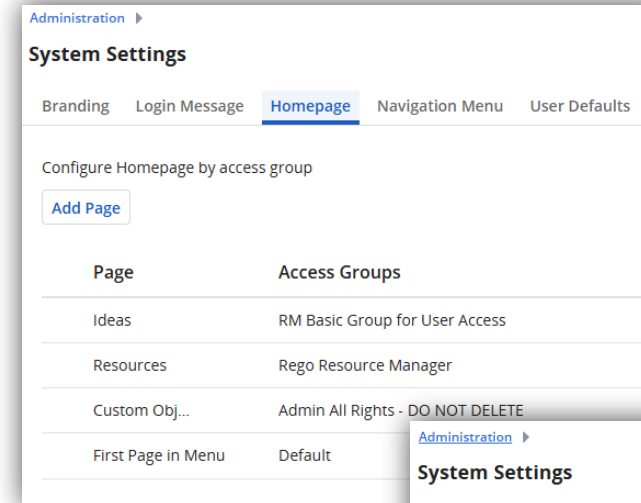
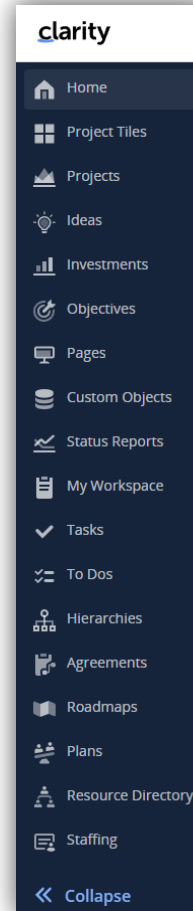
Visible menu options depend on:

1. User's level of access
2. Menu configuration



Home Page - is a configurable landing page

- *Location: Administration -> System Settings -> Home Page*



Middle: Main Screen Area

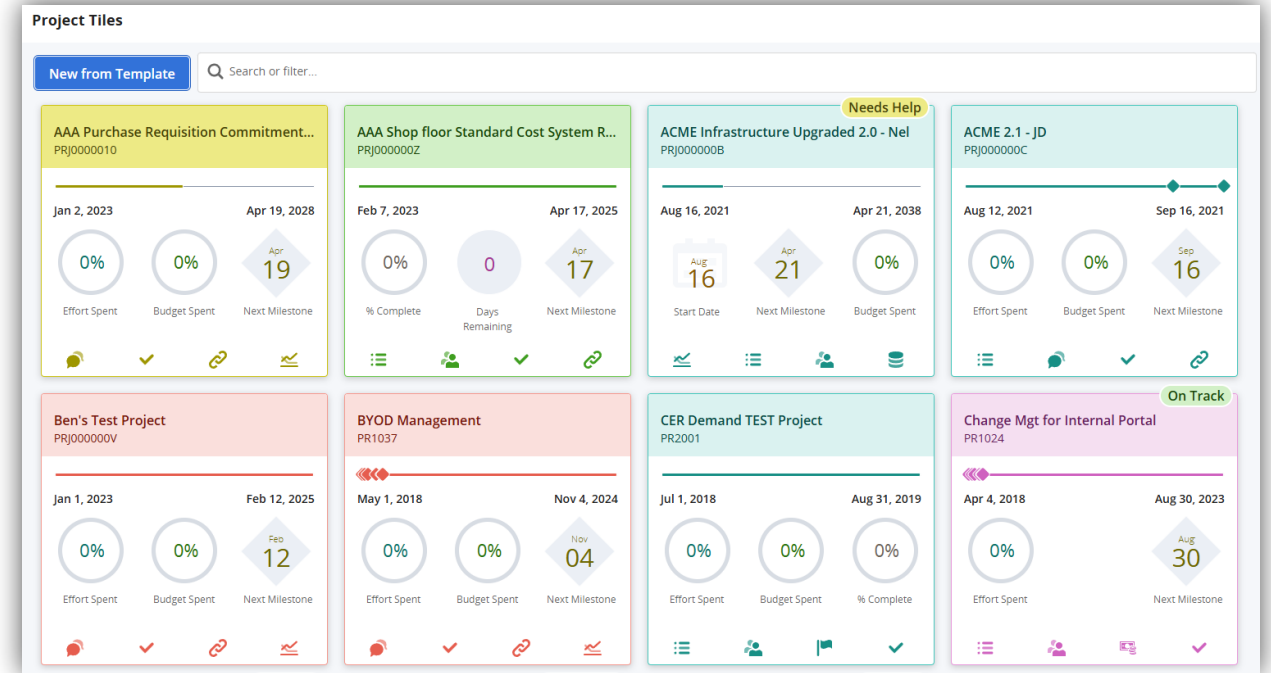


This is the frame where the loaded module or functional component will be display



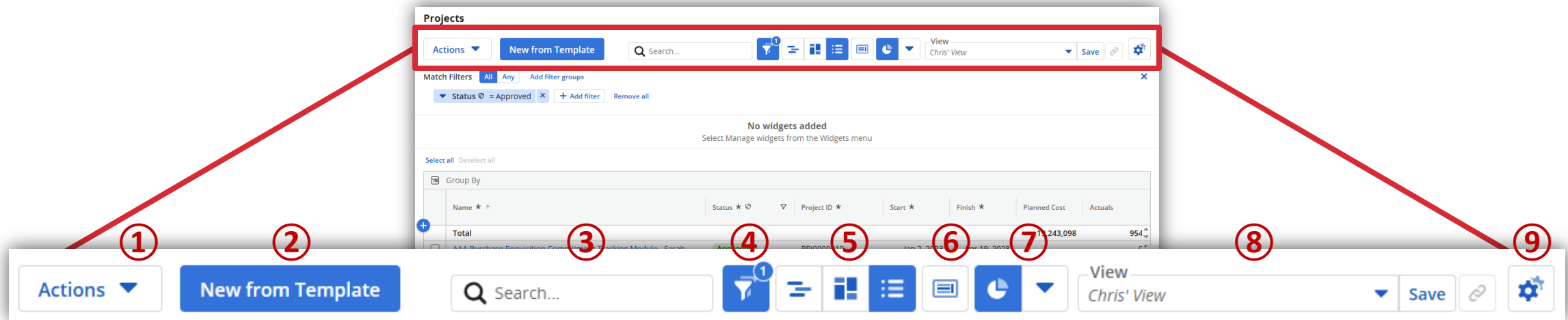
A module's initial landing page is typically either:

- A Grid Layout (e.g. Projects)
- A Tile Layout (e.g. Administration) with drill-down tiles to sub-components of the module



The Common Grid

Common Grid: Action Bar



1. Actions Menu
 - Import / Export grid data
 - Execute Process-driven actions
2. Template button: Invokes Create-From-Template dialogue
3. Quick Search: Search by *Name* and *ID* only
4. Expand filter: show/hide filter options
5. Change view (timeline, board, grid)
6. Conditional Formatting
7. Show/Hide widgets (configurable in Blueprint)
8. Views: save, share, load customized grid views
9. View Options
 - Configure view settings
 - Define Picklists

Common Grid: Features

- Edit and Delete multiple rows
- Copy / paste data, drag values
 - Limited to data between rows of a column when column is lookup-based
- Group by columns
 - Collapse and summarize by expandable groups
- Column sizing
 - Auto-size by data widths
 - Manual: Drag column size per column
- Shift + Click: Multi-column sorting (up to 4 columns)
- Right-click cell whitespace vs. Right-click cell hyperlink
 - Whitespace: Invokes Clarity context menu
 - Hyperlink: Invokes browser context menu
- Flyouts
 - Column: Select columns that should appear in the grid
 - Details: View a single record's details in a blueprint-like format

Select all Deselect all

Group By

	Name ★ ↑	Status ★ ⚙	Project ID ★	Start ★	Finish ★	Planned Cost	Actuals
Total						19,243,098	954
<input type="checkbox"/>	AAA Purchase Requisition Commitment Tracking Module - Sarah	Approved	PRJ0000010	Jan 2, 2023	Apr 19, 2028		
<input type="checkbox"/>	Automated Security Enhancements	Approved	PR1016	Mar 1, 2018	Oct 1, 2022	264,400	
<input type="checkbox"/>	CER Demand TEST Project	Approved	PR2001	Jul 1, 2018	Aug 31, 2019	9,342,272	
<input type="checkbox"/>	Change Mgt for Online Order Entry DJL	Approved	PR1026	Feb 4, 2018	Feb 22, 2018	61,560	
<input type="checkbox"/>	Client Services Datamart	Approved	PR1005	Feb 1, 2018	May 24, 2024	218,800	
<input type="checkbox"/>	Compliance Audit - Security	Approved	PR1018	Apr 1, 2018	Aug 31, 2018	250,000	
<input type="checkbox"/>	CRM Contact Center Development	Approved	PR1028	Nov 1, 2017	Mar 26, 2018	386,800	
<input type="checkbox"/>	CRM Enhancements	Approved	PR1029	Nov 29, 2017	Apr 8, 2018	367,600	
<input type="checkbox"/>	Data Warehouse Performance Tuning	Approved	PR1027	Feb 1, 2018	Jun 13, 2018	317,200	
<input type="checkbox"/>	eBusiness Mobile Network	Approved	PR1011	Oct 3, 2017	Sep 3, 2021	646,660	
<input type="checkbox"/>	eCommerce Portal	Approved	PR1002	Dec 1, 2017	Jul 11, 2018	414,200	
<input type="checkbox"/>	Edelweiss Financial	Approved	PRJ000001F	Jan 1, 2025	Dec 31, 2025	1,753,920	
<input type="checkbox"/>	Email SAN Storage Implementation	Approved	PR1022	Mar 1, 2018	Dec 31, 2020	168,400	

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Select all Deselect all

Status

Group	Planned Cost	Actuals	Name ★	Status ★ ⚙
Total	171,632,035	954		
> Approved (33)	19,243,098	954		
> Rejected (2)	343,020	0		
> Unapproved (47)	152,045,917	0		

Search...

- ☒ Name ★
- ☒ Status ★ ⚙
- ☒ Planned Cost
- ☒ Actuals
- ☒ Project ID ★
- ☒ Start ★
- ☒ Finish ★
- ☒ Agile State ⚙
- ☐ % Complete
- ☐ % Complete Calculation...
- ☐ % Done By Agile Plan E...
- ☐ % Done by Story Count
- ☐ Active ⚙
- ☐ active_bus
- ☐ Actuals Sum for Labor ...

AAA Purchas... (PRJ0000010)

Details

Configure

Name ★

AAA Purchase Requisition Com...

Status ★ ⚙

Approved

Planned Cost

Actuals

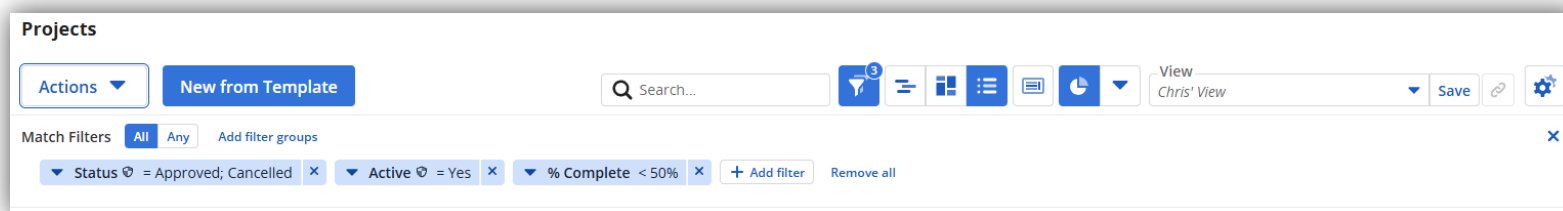
0.00

Project ID ★

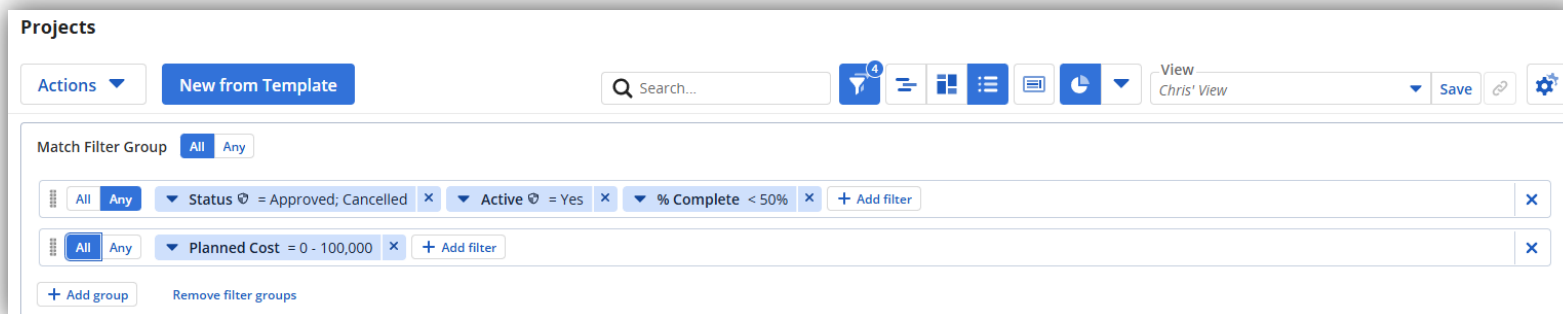
PRJ0000010

Common Grid: Filtering

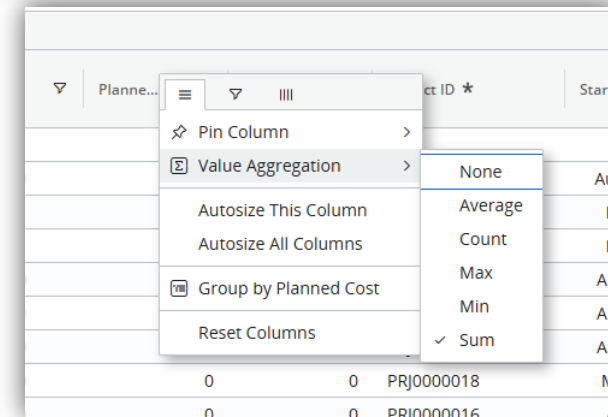
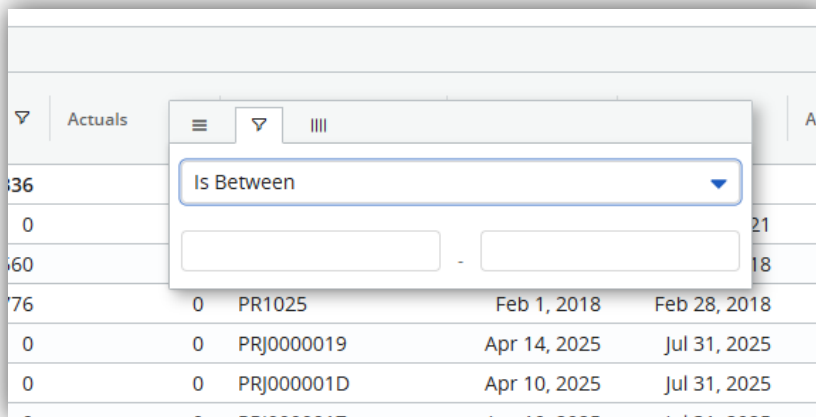
 Column filtering



 Filter groups for nested filtering rules



 In-column filtering and aggregation



Blueprint Screens



Blueprint Screens

- Contain detailed data for a single record
- Tabs to sub-objects, channels, reports, etc.
- Based-on 6-column “Responsive” framework
- Contain expandable/collapse-able sections
- Rich Text fields contain a WYSIYG editor
- Lookup-based fields can be configured with auto-suggest values and expanded, multi-column LOVs
- Data is saved on the fly without “Save” button
- Data is refreshed on the fly (in most cases) when background processes update on-screen values

The screenshot displays a web interface for a project management system. At the top, a header bar shows the project name 'Compliance Audit - Security' with ID 'PR1018' and a status 'On Track'. Below this is a navigation bar with tabs: Status, Properties (selected), Staff, Sutter Actions, Tasks, Conversations, Links, Risks, Issues, Changes, Documents, and Nel N. A 'Collapse all' button is visible. The main content area is divided into sections: 'Project Summary' and 'Stakeholders'. The 'Project Summary' section includes fields for Name (Compliance Audit - Security), Project ID (PR1018), Project Type (Major Project), Work Status (Requested), Start date (Apr 1, 2018), and Finish date (Aug 31, 2018). An Objective field contains a text description. The 'Stakeholders' section includes a Sponsor field (Roberts, Beth), Project Management Office (Olney, Pam), and Finance and Governance (Granger, Paula). A 'Settings' section is partially visible at the bottom.

Questions?





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- 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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