

# ★ LAS VEGAS ★

## regoUniversity

### 2025

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# Clarity Dashboard, Canvas, and Reporting

Your Guides:  
Rajini Mamidi and Lulu Wang

Gold Sponsor



# Agenda

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## Clarity's native reporting ecosystem

- Discover the full spectrum of built-in tools and when to use each one effectively

## Canvas

- Dive into the customizable workspace for data exploration and visualization

## New reporting!

- Build, design and share reports with ease

## Hands-on application

- Practice building reports and canvas

## Tips to choose right reporting tool

- Select the best-fit solution for your reporting goals, audience, and data needs

## Best Practices

- Tips for maximizing value



# Let's Connect!

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



# Clarity's Reporting Ecosystem

# Key Considerations Before Building a Report



## Who is the audience?

Understand the role, needs, and expectations of the end user.



## What questions are they asking?

Focus on the core insight or decision the report should support.



## How can we answer it?

Choose the right data, visualizations, layout and level of detail.



## How often do you need the data refreshed?

Define how real-time the data needs to be (real-time, daily, weekly).



## Start simple, scale smart

Begin with essentials and scale up based on feedback and value.

# Clarity's Reporting Ecosystem



## Views

Real time customizable displays



## Canvas

Widget based real time dashboard



## Portlets

Customizable data display component



## Advanced Reporting - Jaspersoft

Embedded reporting solution



## Widgets

Interactive visual components



## New Reporting

Inhouse business intelligence solution



## Odata

Inhouse business intelligence solution



# Clarity's Reporting Ecosystem

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## Views

Real time customizable displays



## Canvas

Widget based real time dashboard



## Portlets

Customizable data display component



## Advanced Reporting - Jaspersoft

Embedded reporting solution



## Widgets

Interactive visual components



## New Reporting

Inhouse business intelligence solution

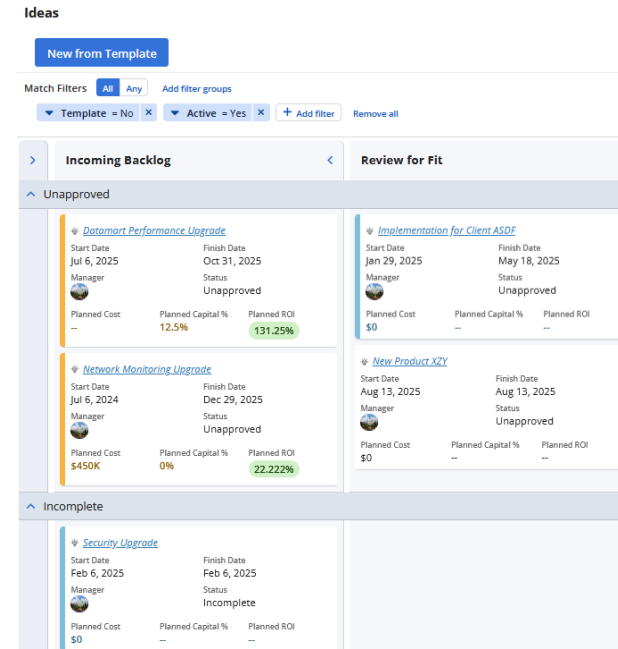


## Odata

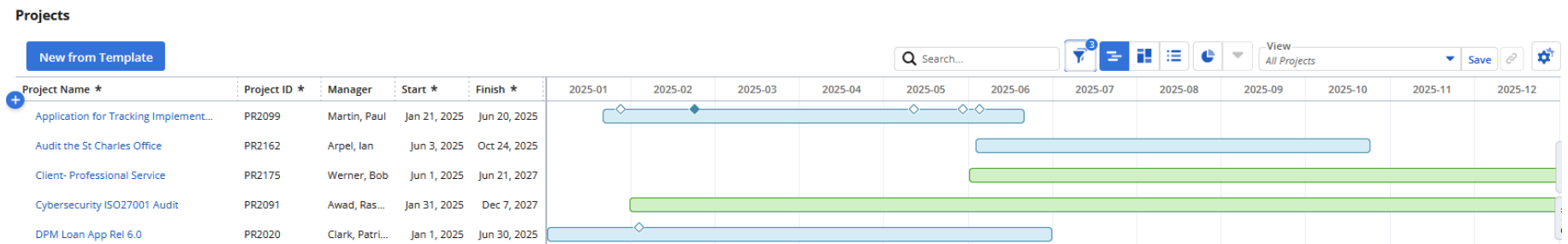
Inhouse business intelligence solution

# Views – Real Time Data

- Customizable display of data
  - Show specific fields tailored to your persona or use case with advanced filtering capabilities
- Use filters to refine data
- Multiple layouts
  - Grid, Board, and Timeline formats adapt to different workflow needs
- CSV exportable
- Real time data



Idea coordinator's kanban board



Project manager view of his projects schedules



# Views – OKR Overview for Strategic Leadership

## OKRs

New from Template

Search...

View

Strategic Review

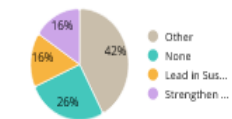
Save

Settings

### By Strategic Imperative



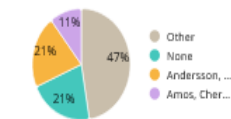
### By Goal



### Watch List



### Owner



### Low Confidence



### High Fulfillment



### Avg. Fulfillment

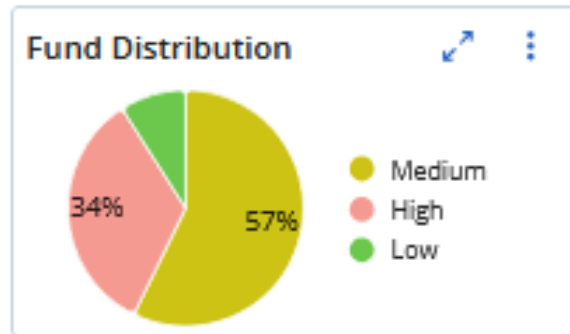


Select all Deselect all

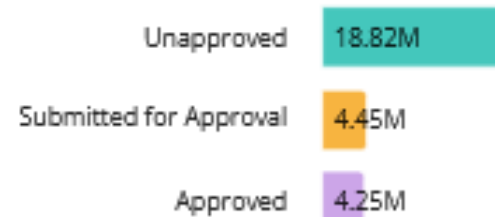
	Objective: Name *	Strategic Imperative ↑	Owner	Target	Start	Confidence Score	Progress	Key Results	Conversation
<input type="checkbox"/>	Strengthen Talent Acquisition and Employee Engagement	Cultivate a High-Performance, Diverse Workforce	Lopez, Maria	Dec 29, 2023	Sep 1, 2023	60%	69%	2	
<input type="checkbox"/>	Accelerate Product Innovation to Meet Market Demands	Drive Innovation and Product Leadership	Andersson, Peter	Jan 28, 2025	Jul 1, 2023	20%	57%	5	✓
<input type="checkbox"/>	Enhance Research and Development (R&D) Capabilities	Drive Innovation and Product Leadership	Andersson, Peter	Jan 28, 2025	Jul 1, 2023	80%	67%	1	
<input type="checkbox"/>	Optimize global operations to improve productivity, reduce costs, and scalability	Enhance Operational Efficiency and Scalability	Amos, Cheryl	Jan 28, 2025	Jul 1, 2023	80%	63%	3	
<input type="checkbox"/>	Expand into High-Growth Markets (e.g., Asia-Pacific, Latin America, Middle East)	Expand Global Market Reach	Barry, Debra	Jan 28, 2025	Jul 1, 2023	70%	40%	4	
<input type="checkbox"/>	Strengthen Brand Presence and Customer Loyalty Globally	Expand Global Market Reach	Andersson, Peter	Jan 28, 2025	Jul 1, 2023	60%	67%	3	
<input type="checkbox"/>	Lead in Sustainable Product Development	Lead in Sustainability and Social Responsibility	Barry, Debra	Dec 29, 2023	Sep 1, 2023	60%	50%	1	
<input type="checkbox"/>	Drive Corporate Social Responsibility (CSR) Impact	Lead in Sustainability and Social Responsibility	Andersson, Peter	Dec 29, 2023	Sep 1, 2023	80%	33%	1	
<input type="checkbox"/>	Foster Diversity and Inclusion Across All Levels	Lead in Sustainability and Social Responsibility	Clark, Patrick	Dec 29, 2023	Sep 1, 2023	60%	50%	1	
<input type="checkbox"/>	Enhance Digital Customer Support Channels	Maximize Customer-Centric Digital Experiences	Dixon, Danielle	Apr 2, 2024	Sep 1, 2023	70%	60%	1	
<input type="checkbox"/>	Improve Personalized Customer Engagement	Maximize Customer-Centric Digital Experiences	Higgins, Tanya	Apr 2, 2024	Sep 1, 2023	60%	0%	1	
<input type="checkbox"/>	Achieve Industry-Leading Security Standards	Strengthen Cybersecurity and Data Protection	Amos, Cheryl	Jan 28, 2025	Jul 1, 2023	30%	75%	3	
<input type="checkbox"/>	Increase Operational Agility and Flexibility	Strengthen Cybersecurity and Data Protection	Higgins, Tanya	Dec 29, 2023	Sep 1, 2023	60%	16%	2	
<input type="checkbox"/>	Enhance Data Privacy Compliance and Governance	Strengthen Cybersecurity and Data Protection	Bauer, Joyce	Jan 28, 2025	Jul 1, 2023	70%	55%	4	
<input type="checkbox"/>	Team OKR Template			Feb 7, 2025	Feb 7, 2025		0%	0	
<input type="checkbox"/>	Aspirational: Preserve a favorable policy environment for the utility-scale ...		Arpel, Ian	Apr 9, 2026	Apr 9, 2025	75%	0%	0	
<input type="checkbox"/>	Enterprise OKR Template			Jan 1, 2025	Jan 1, 2025		0%	0	
<input type="checkbox"/>	Portfolio OKR Template			Jan 1, 2025	Jan 1, 2025		0%	0	
<input type="checkbox"/>	Program OKR Template			Jan 1, 2025	Jan 1, 2025		0%	0	

# Widgets

- Small, configurable, visual component
- Summarized, graphical or numeric glimpse of key metrics
- Drill into important information
- Real time data
- Interactive filtering



**Planned Cost by Status**



**High Piori...**



**Approved Ideas**

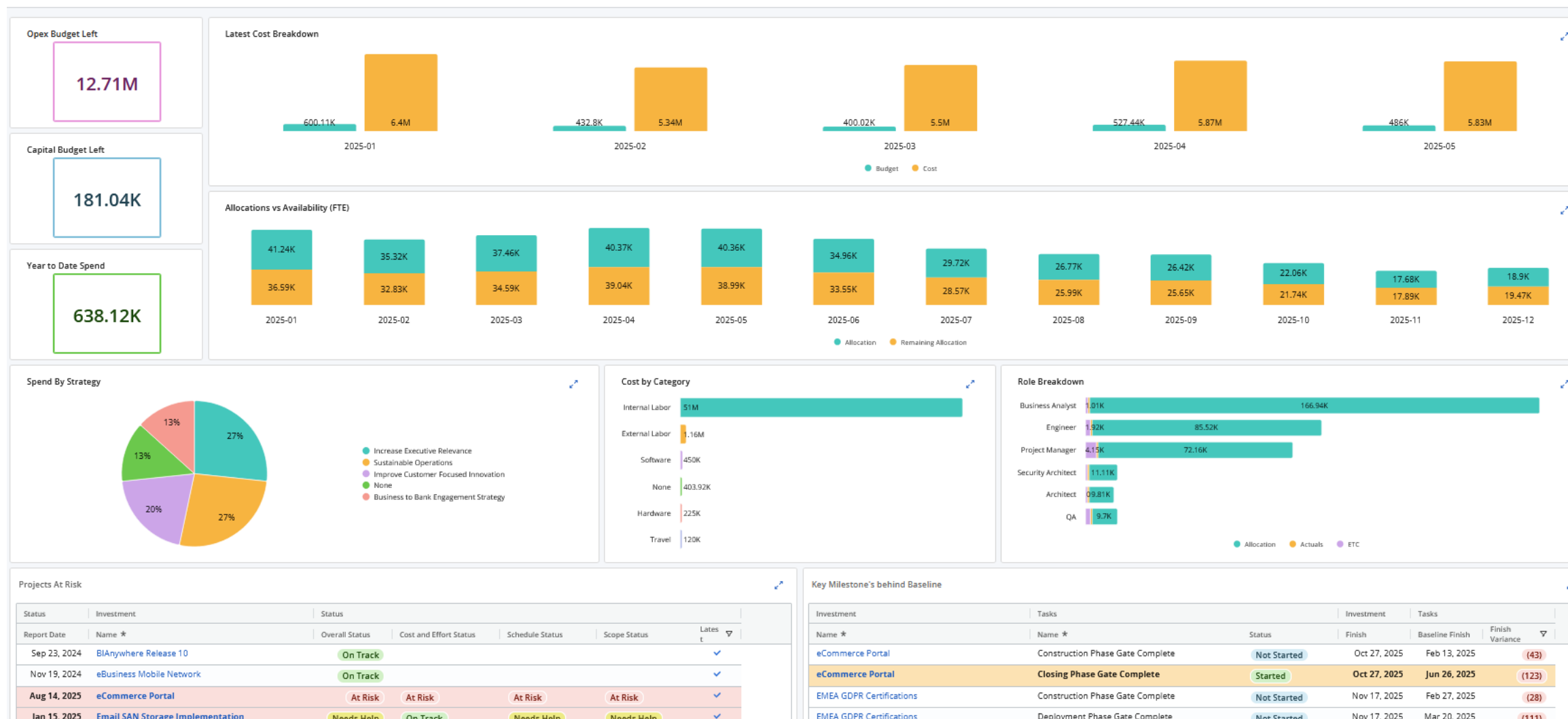


# Canvas

- Combine visuals, filters, and components to tell a story
- Specific module instances
- Hierarchical roll-ups
- System-wide overviews
- PDF exportable
- Real-time data

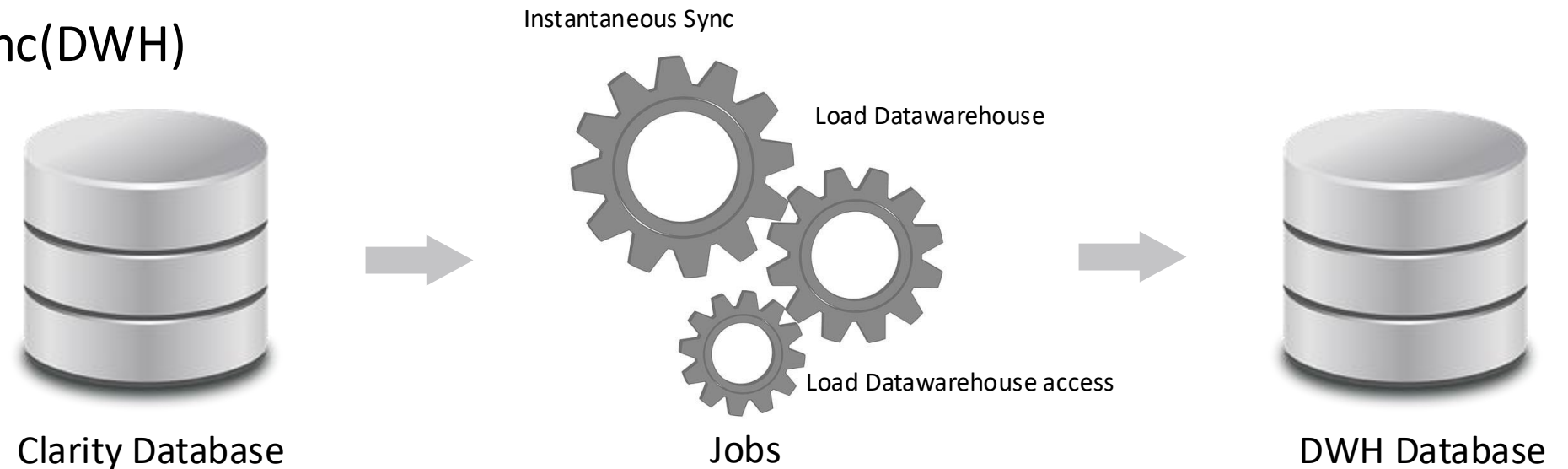


# Canvas – PMO's Portfolio overview



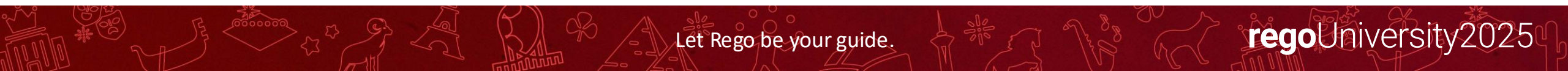
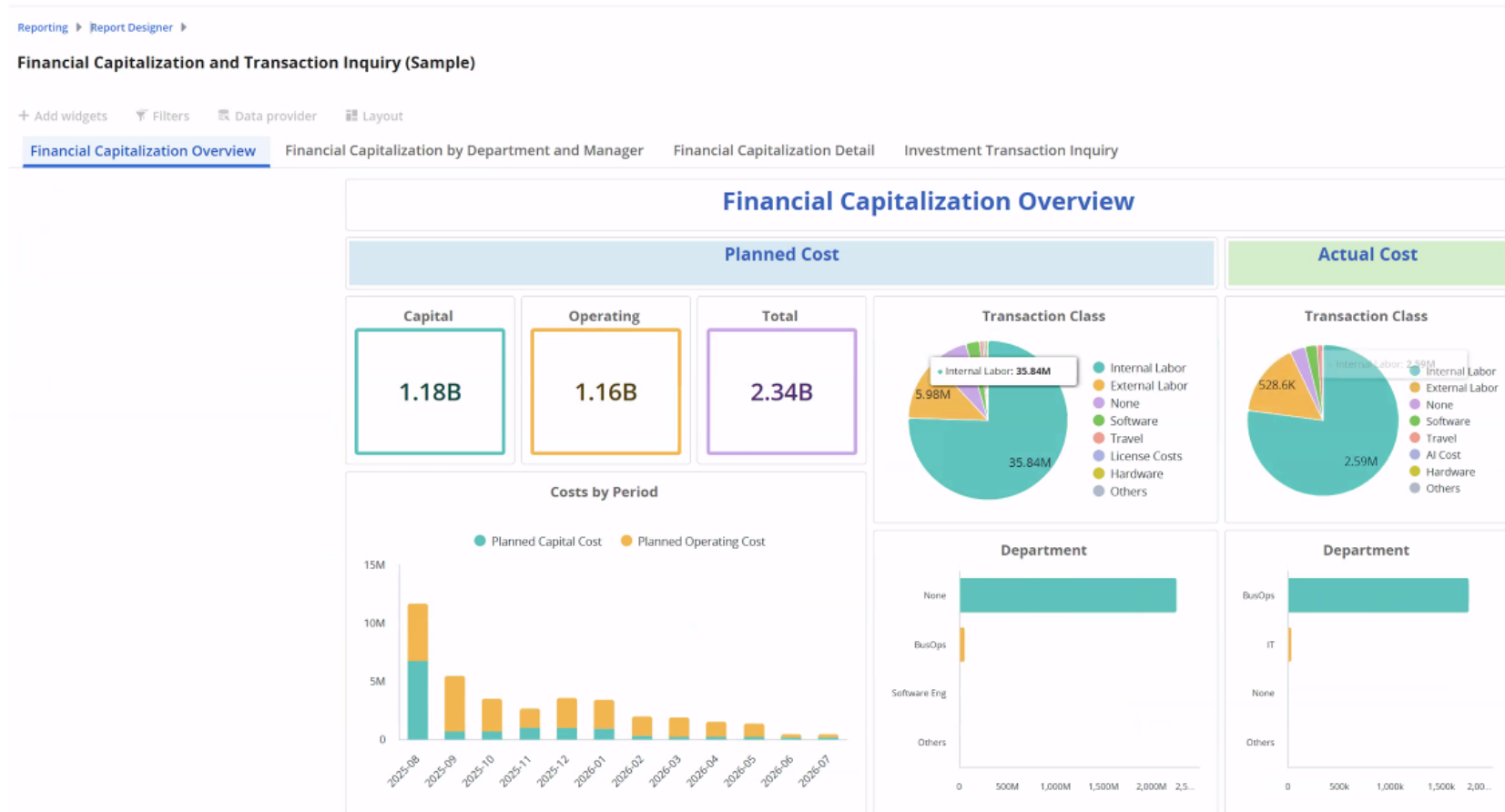
# Reporting – New!

- Create structured and formatted dashboards
- Native platform
- No-code/low code reporting workspace
- Extract data
- CSV, PPTX, PDF exportable
- Instantaneous Sync(DWH)



# Reporting – PMO'S Financial Capitalization Dashboard

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# Reporting – RMO's Capacity vs Demand

Reporting > Report Designer >

## Capacity vs. Demand by Resource (Sample)

Published: Aug 1

+ Add widgets   Filters   Data provider   Layout

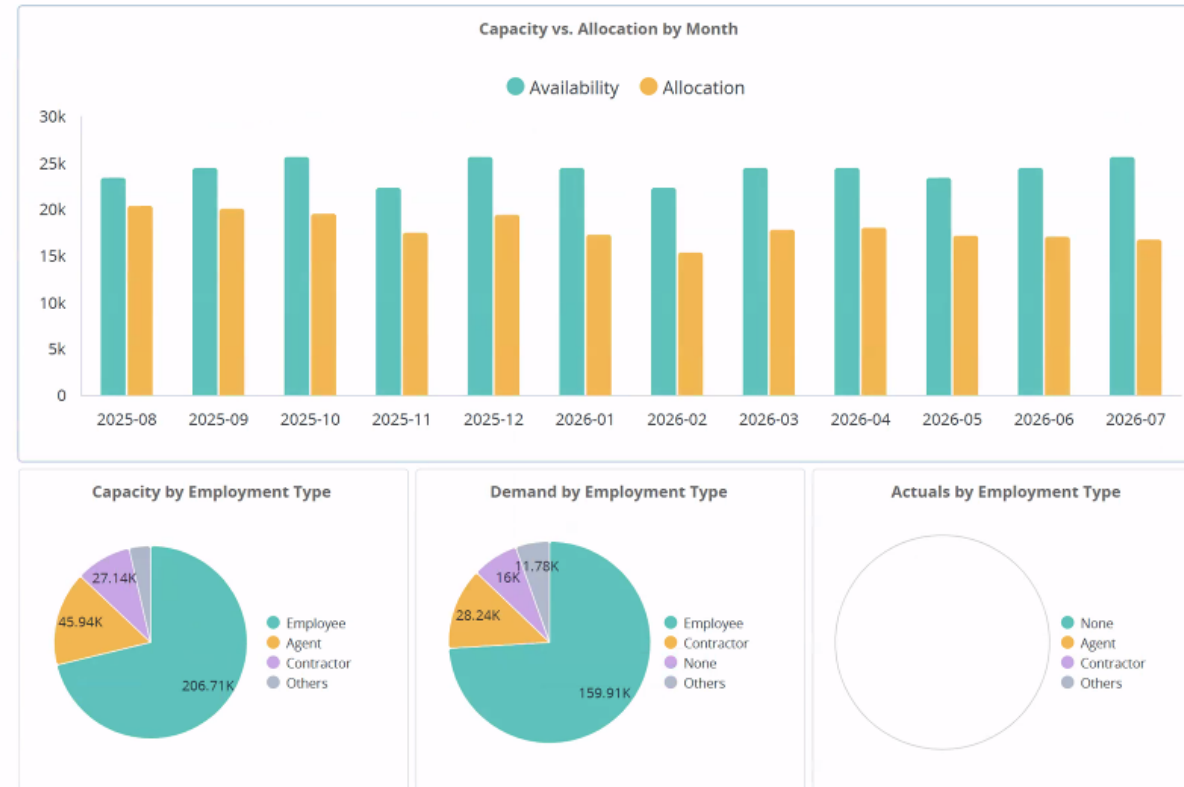
Overview

Capacity vs. Demand by OBS

Over/Under Allocation by Resource Manager

Capacity vs. Demand by Resource

Investment Allocations by Resource



# Reporting – RM's Over- Under Allocation Report

## Over/Under Allocations by Resource



### Over/Under Allocation by Resource

Over/Under Allocation by Resource										
Full Name	2025-09	2025-10	2025-11	2025-12	2026-01	2026-02	2026-03	2026-04	2026-05	2026-06
	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...
ABM Marketing	0	0	0	0	0	0	0	0	0	0
AI Team	(4)	(4)	(4)	(5)	(4)	(4)	(0)	0	0	0
Amos, Cheryl	1	1	0	0	0	0	0	0	0	0
Analyst Relations	0	0	0	0	0	0	0	0	0	0
Andersson, Peter	(2)	(2)	(1)	(1)	0	0	0	0	0	0
Architect	14	12	7	4	3	2	1	1	1	1
Arpel, Ian	1	1	2	2	1	1	1	1	1	1
Awad, Rashid	0	0	0	0	0	0	0	1	1	1
Baker, Isaac	0	2	1	1	1	1	1	1	1	1
Barry, Debra	1	(1)	(1)	(1)	0	0	0	0	0	0
Bauer, Joyce	0	0	0	0	0	0	0	0	0	0
Berks, Paul	0	0	0	0	0	0	0	0	0	0
Berry, Jason	0	0	0	0	0	0	0	0	0	0
Bhatt, Rakesh	0	0	0	0	0	0	0	1	1	1
Blackhawks Team	5	5	2	2	2	2	2	2	2	2
Business Analyst	11	7	2	1	1	1	0	1	0	0
Carmen, Ed	1	1	0	0	0	0	0	0	0	0
Chapin, Tom	0	0	0	0	0	0	0	0	0	0
Chasen, Nicole	2	2	1	1	1	1	1	1	1	1
Chen, Chih-wei	0	0	0	0	0	0	0	0	0	0
Childers, Valerie	(1)	(1)	(1)	(1)	0	0	0	0	0	0
Clark, Patrick	0	0	0	0	0	0	0	0	0	0

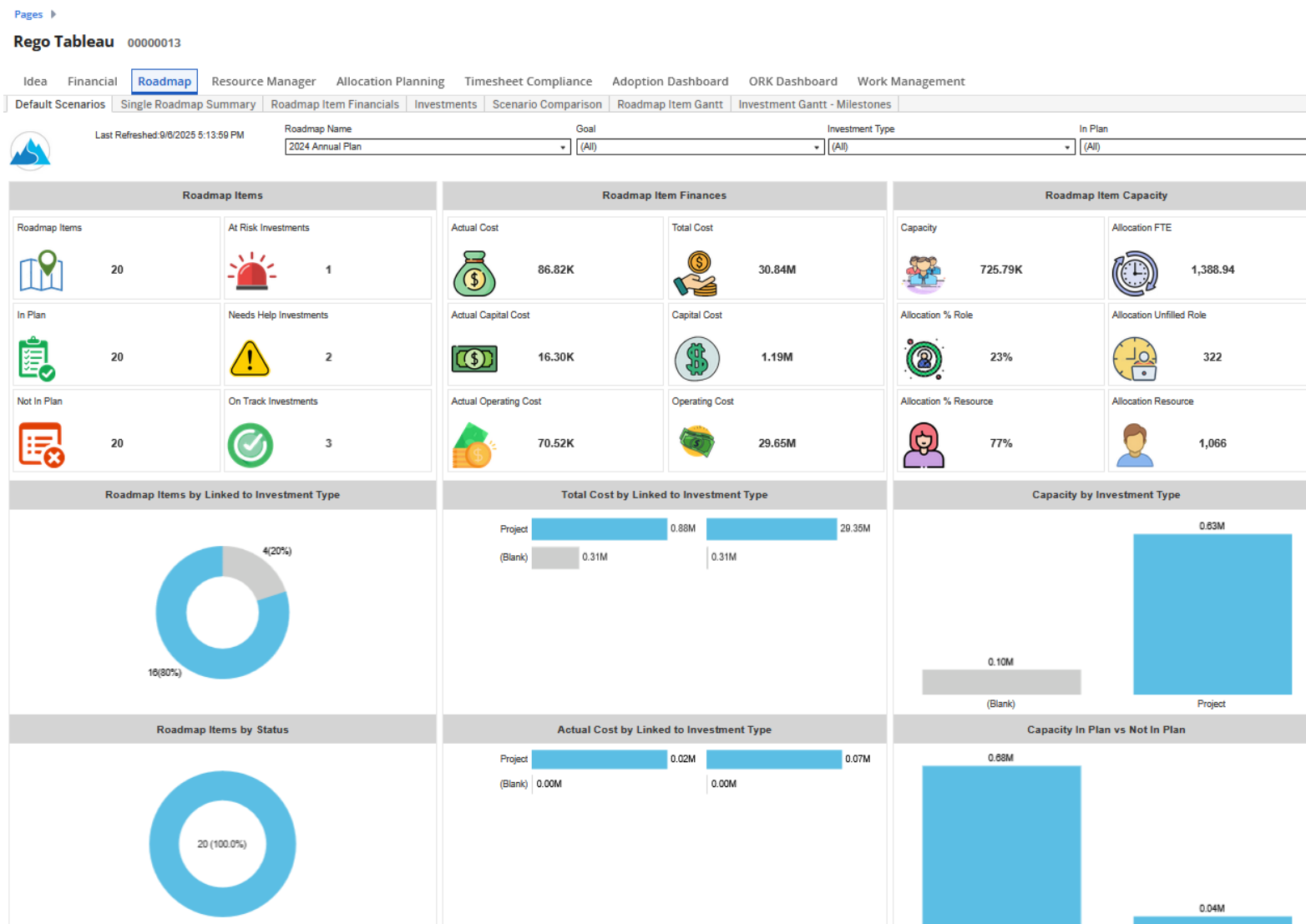
# Odata

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- What is odata
  - Read only access to Datawarehouse
  - Enables external reporting tools like Power BI, Tableau
  - Ideal for advanced analytics, blending with other data sources

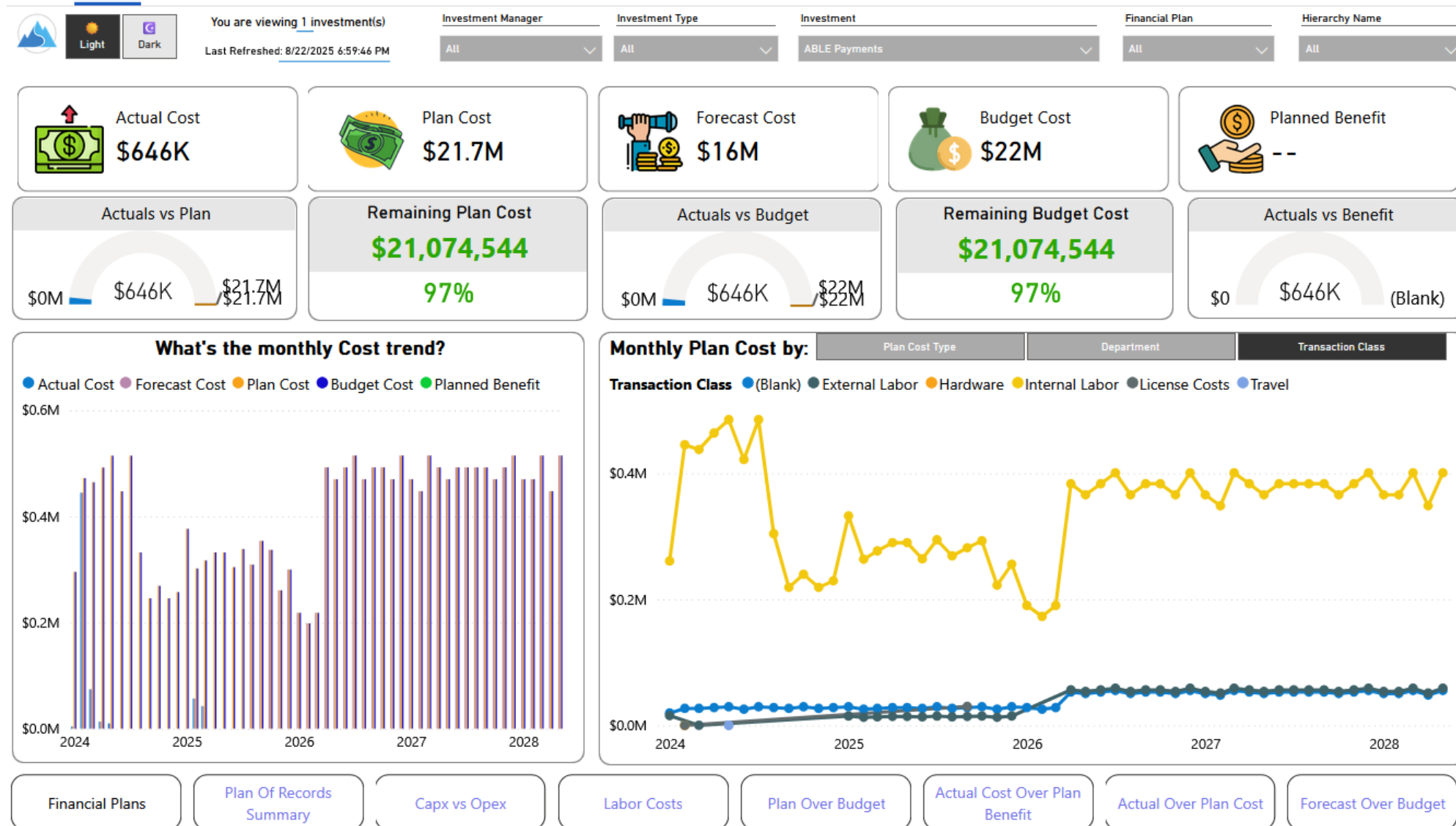


# Odata - Product Manager's Roadmap KPI Overview



# Odata – Finance Manager's Investment KPI Dashboard

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# Portlets

- Customized data display
- Query based
- Can embed portlets across various dashboards
- Drill down capability
- Charts, grids, filter, html types
- Available in Classic
- Expose to MUX using channels
- Export to CSV, Excel and PPTX
- Real time or DWH based

## Resource Planning: Organizational Demand

Scenario: [-Select-]

> OBS Resource Aggregation

[Filter: People \*]

OBS +		Allocation					
		Sep 25	Oct 25	Nov 25	Dec 25	Jan 26	Feb 26
People							
BU Staff							
Contractors							
Engineering							
Management							
Marketing							
Scientists							
Teams							

SAVE

Work effort=FTE

> OBS Investment Aggregation

[Filter: AFD \*]

Name		Allocation					
		Sep 25	Oct 25	Nov 25	Dec 25	Jan 26	Feb 26
ABLE Business Unit		166.44	134.79	124.18	118.90	32.63	31.88
BusOps		52.94	38.29	27.68	26.90	19.63	18.88
Marketing		4.50	4.50	4.50			
Software Eng		9.00	9.00	9.00	9.00	9.00	9.00

SAVE



# Advanced Reporting - Jaspersoft

- What is Jaspersoft
  - BI reporting solution
  - Powered by TIBCO
  - Embedded in Clarity
  - Jaspersoft is being deprecated in favor of **Clarity's new native reporting**
    - SaaS - Clarity - 16.4.3 - September 11, 2026
    - On Premise - Clarity 16.5.0 - November 9, 2026

# Rego Assets

- Rego Power BI Saas
  - Suite of **free, pre-built Power BI dashboards**
  - Designed to integrate seamlessly with Clarity
  - Customizable to meet specific organizational needs
- Rego Odata Extension (AWS Only)
  - Define custom odata feeds
  - Provides access to clarity data (transactional db)
- Data Extractor
  - Extract large datasets
  - Clarity or DWH data

# Canvas

Deep Dive

# Canvas

- Dashboard and visualization tool
  - Allows visualization of data by providing a flexible, widget-based layout
- Drag-and-drop layout
  - You can drag and drop widgets, fields, and tables to customize the layout of a Canvas page
- Dynamic filters
  - Users can interact with filters to refine the data shown in tables or widgets — by owner, status, date ranges, or other fields.
- Interactive tables (sub-objects)
  - Tables on Canvas support features like sorting, filtering, inline editing
- Saved views and personalization
  - Users can create and save personalized views of a Canvas page



# Canvas

- Editable Widgets and Fields
  - Many widgets and fields on the Canvas are editable directly in place, depending on your access rights
- Data security
  - View data based on your access
  - Field level security respected
  - Blueprint rules are supported

**Project Canvas**

Properties Conversations Tasks Links Status Financials Risks Issues Changes Documents

Name \*  
ACME 2.1 - JD - Rajini Rego U demo

Project Man  
Olney, Pan

Open Todos  
80%

Planned Cost  
315.08K

High Priority Risks  
4

Status Indic  
On Track

% Complete  
80%

Unresolved Issues

Name *	Priority *	Assigned To *	Status *	Category Type
High attrition rate	High	Mamidi, Rajini	Open	Flexibility
Incompatible Data Structures	Low	Mamidi, Rajini		
Poor Data Quality	Low	Mamidi, Rajini		erface
Unclear Data Ownershin	Low	Mamidi, Rajini		dependencies

Search...

Search...

Open

Work in Progress

# Canvas - Types

---

- Module Specific Canvas
  - Object Instance Canvas (Project/Idea/CIT)
  - Status Canvas
- Hierarchy Canvas
- Roadmap Canvas
- Page Canvas

# Canvas

- Available fields
- Widgets (table and chart types)
- Resize
- Columns
- Saved views
- Conditional formatting

**Configure Canvas** 8/10

Widgets    Layout

Q Search...

Number Tile 1

Progress Ring 2

Pie Chart 1

Bar Chart 1

Table 3

% Complete

% Complete Calculation Method

% Done By Agile Plan Estimate

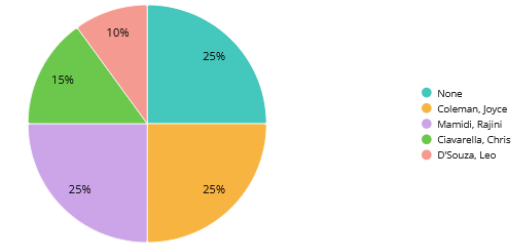
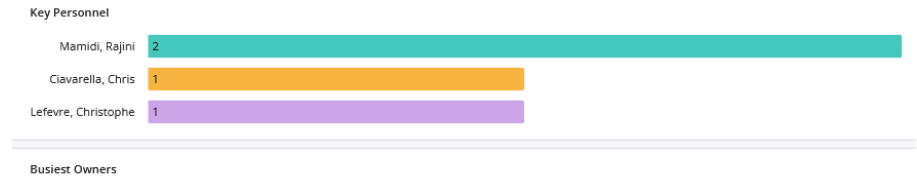
% Done by Story Count

Active

active\_bus

Actuals

Actuals Sum for Labor Resources



Page Canvas - Rego U Demo Rajni

My Tasks Due in Next Two Months

Investment	Tasks	Investment	Tasks	Start	End	Status	ETC	Actuals
Total								
Analysis and ERP Implementation Rego U Demo	AP, HR, and Asset Configuration	Aug 28, 2024	Oct 24, 2025			Not Started	0	
Analysis and ERP Implementation Rego U Demo	Closing Phase	Aug 28, 2024	Oct 24, 2025			Completed	0	
ADMS 2.0 - Rego U Demo	Collect evidence for approval	Aug 28, 2024	Oct 24, 2025			Not Started	0	

**Page Canvas - Rego U Demo**

Export to PDF    Advanced Reporting

Name \*

Open Todos 80%

Planned Cost 315.08K

High Priority... 4

Status Indicator On Track

% Complete 80%

Unresolved Issues

Name *	Priority *	Assigned To *	Status *	Category Type
High attrition rate	High	Mamidi, Rajini	Open	Flexibility
Incompatible Data Structures	Low	Mamidi, Rajini	Open	Objectives
Poor Data Quality	Low	Mamidi, Rajini	Open	Human Interface
Unclear Data Ownership	Low	Mamidi, Rajini	Open	Interdependencies

# Status Canvas

## Enable Objects on Blueprint for Canvas

Administration > Blueprint >

**Standard Project**

Properties Visuals **Modules** Rules Actions Create from Template

Conversations

Tasks

Links

Status

Financial

**Configure - Status**

Edit module details

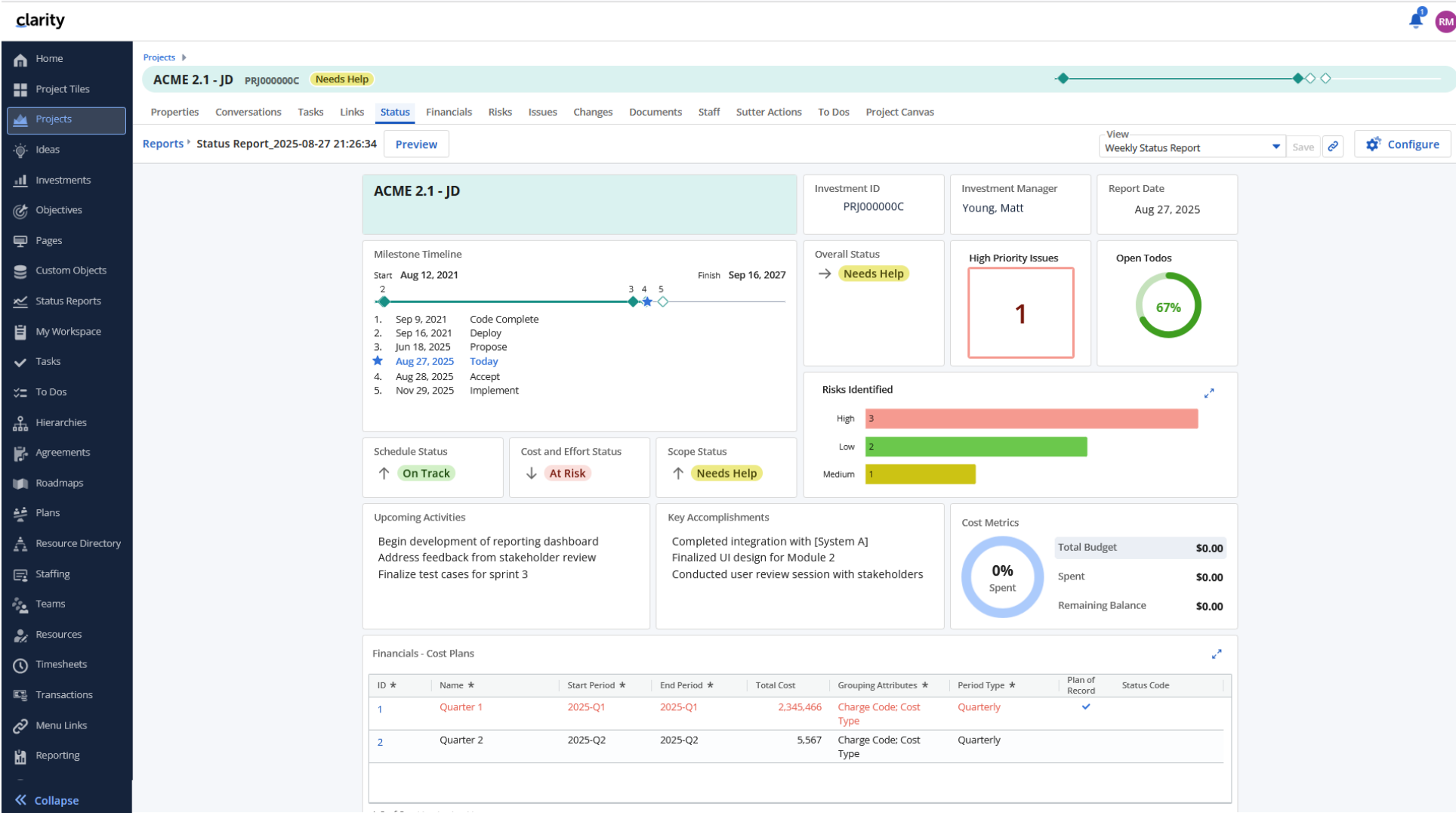
☐ Enable Quick Create

☒ Enable Create Dialog

Enabled	Object
<input type="radio"/>	Changes
<input type="radio"/>	Custom Investment Subobject
<input type="radio"/>	Financials - Benefit Plan Details
<input type="radio"/>	Financials - Benefit Plans
<input type="radio"/>	Financials - Budget Plan Details
<input type="radio"/>	Financials - Budget Plans
<input type="radio"/>	Financials - Cost Plan Details
<input type="radio"/>	Financials - Cost Plans
<input type="radio"/>	Issues
<input type="radio"/>	k_SubOb_Project
<input type="radio"/>	Project Sub object
<input type="radio"/>	Risks

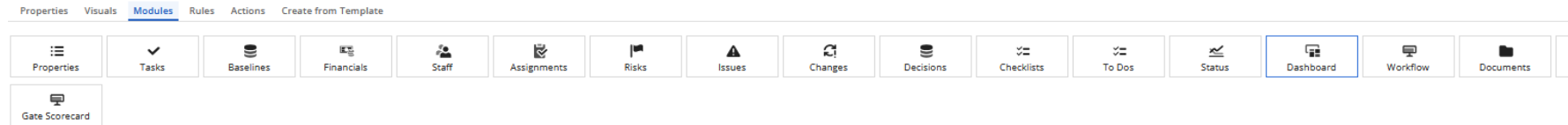


# Status Canvas



# Project Canvas

## Enable Objects on Blueprint for Canvas



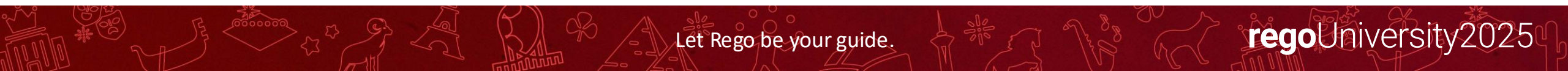
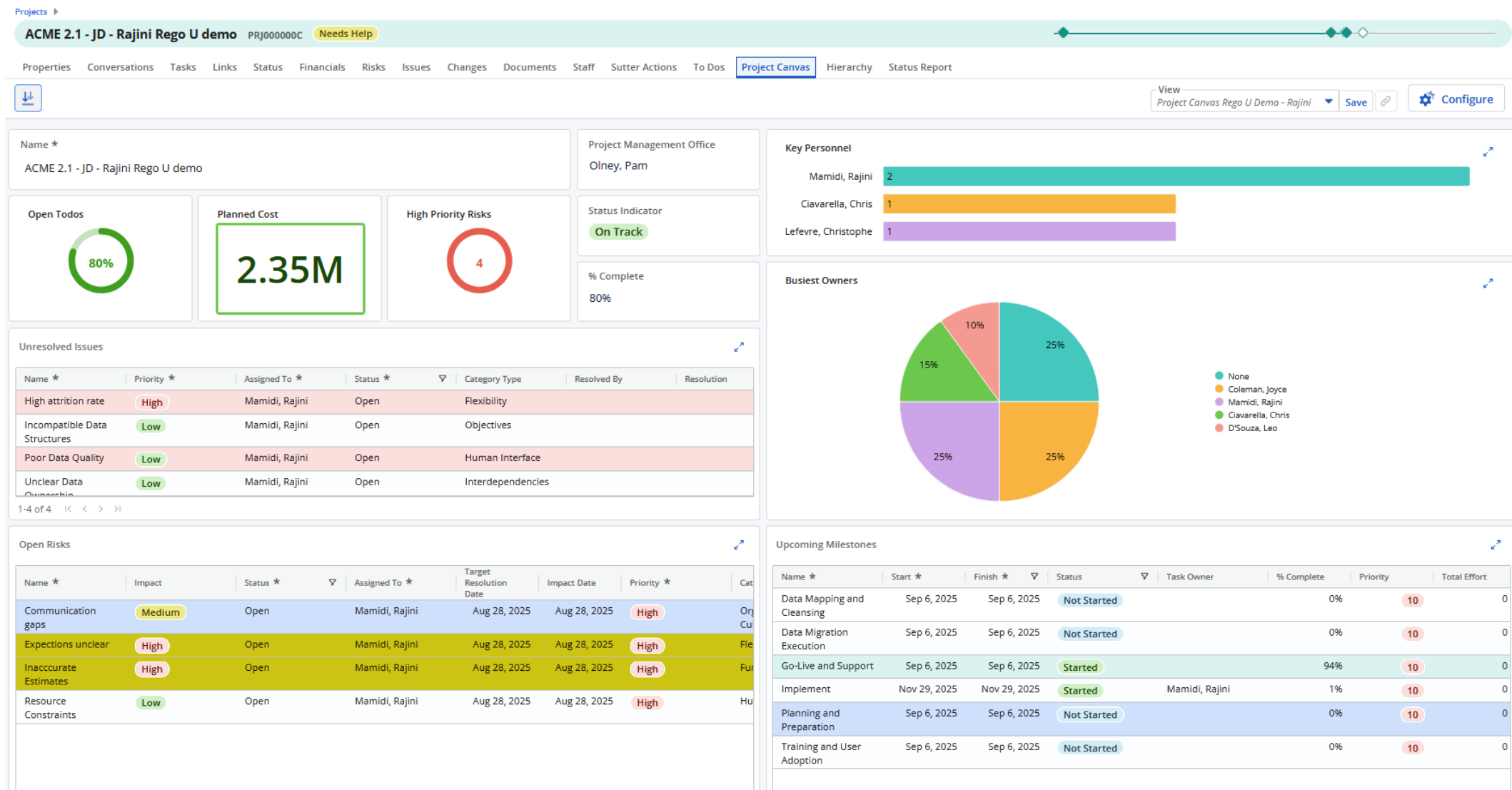
### Configure - Dashboard

Name

Dashboard

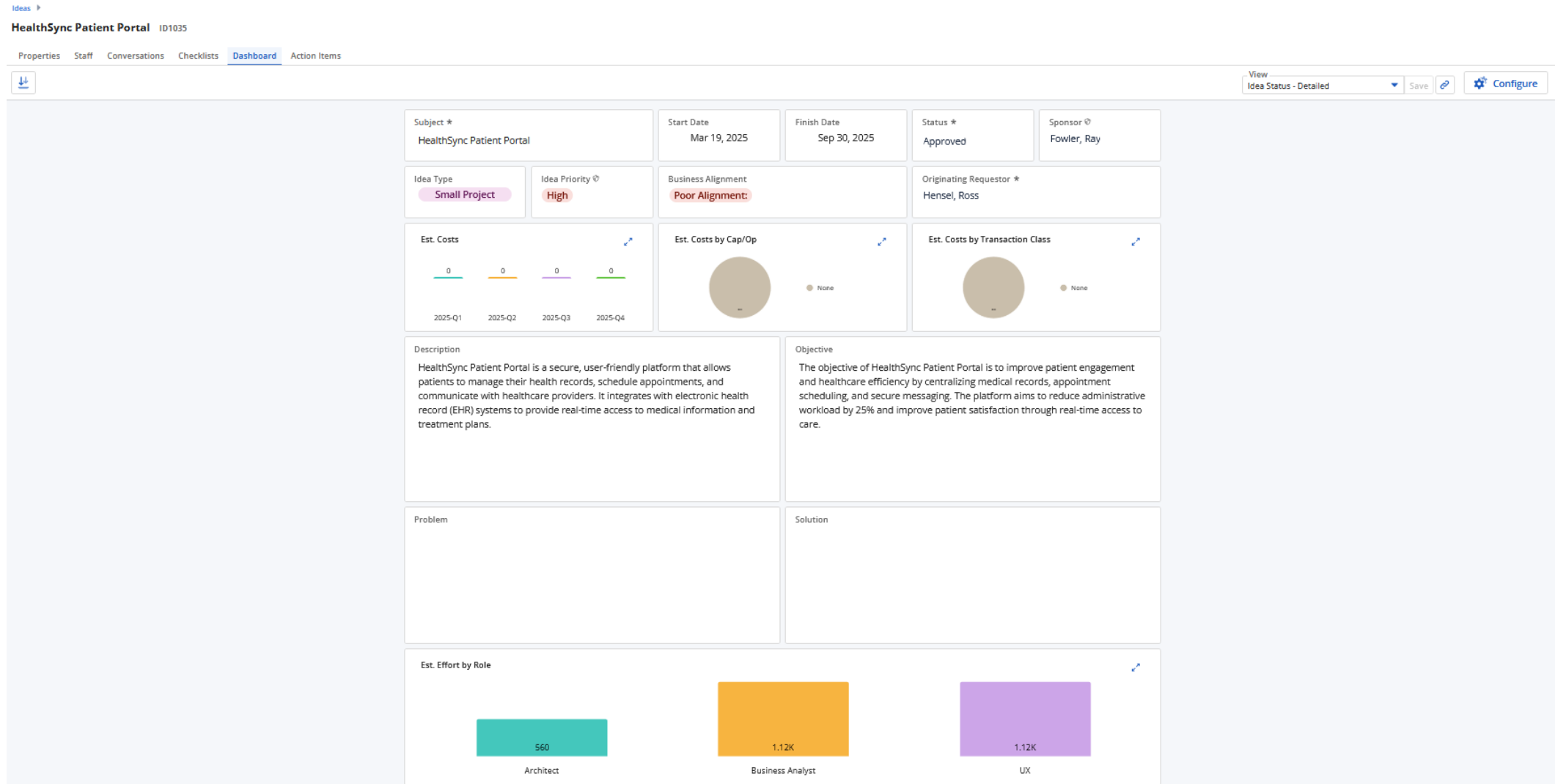
Enabled	Object
<input type="radio"/>	Capacity %
<input type="radio"/>	Changes
<input type="radio"/>	Cross Value Stream Agreements
<input type="radio"/>	Decisions
<input type="radio"/>	Experience Data
<input type="radio"/>	Financials - Benefit Plan Details
<input type="radio"/>	Financials - Benefit Plans
<input type="radio"/>	Financials - Budget Plan Details
<input type="radio"/>	Financials - Budget Plans
<input type="radio"/>	Financials - Cost Plan Details
<input type="radio"/>	Financials - Cost Plans
<input type="radio"/>	Horizon %
<input type="radio"/>	Issues
<input type="radio"/>	Lessons Learned
<input type="radio"/>	Measures
<input type="radio"/>	Risks
<input type="radio"/>	Staff
<input type="radio"/>	Status

# Project Dashboard



# Idea Dashboard

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# Hierarchy Dashboard

## Enable Objects on Blueprint for Canvas

Administration > Blueprint >

**Hierarchy - PSA - EDIT MODE**

Properties Modules Actions

Modules

Q Search...

New Channel New Canvas

- Agreements
- Assessment
- Audit
- Capacity %
- Changes
- Conversations
- Cross Value Stream Agreee...
- Customer Contacts
- Decisions
- Properties
- Experience Data
- Financial Dashboard
- Financials
- Horizon %
- Investments
- Issues
- Key Results
- Lessons Learned
- Measures
- Professional Services Dashbo...
- Status
- Resource Utilization
- Risks
- Risks
- Staff

Investments Status Risks Issues Financials Staff Resource Utilizati... Staffing Dashboa... Professional Serv... Properties

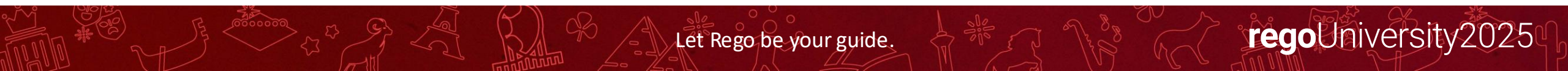
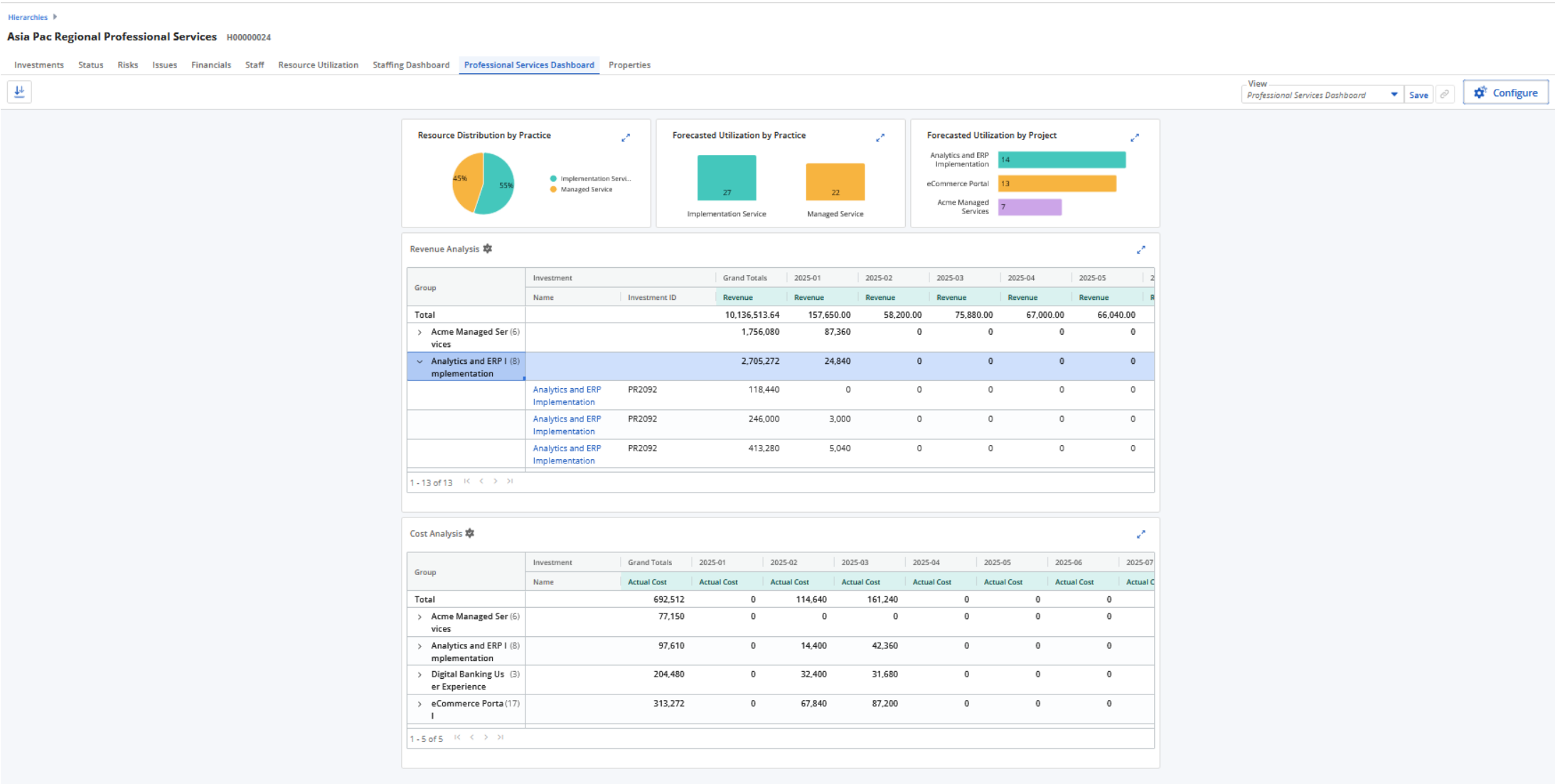
**Configure - Professional Services Dashboard**

Name

Professional Services Dashboard

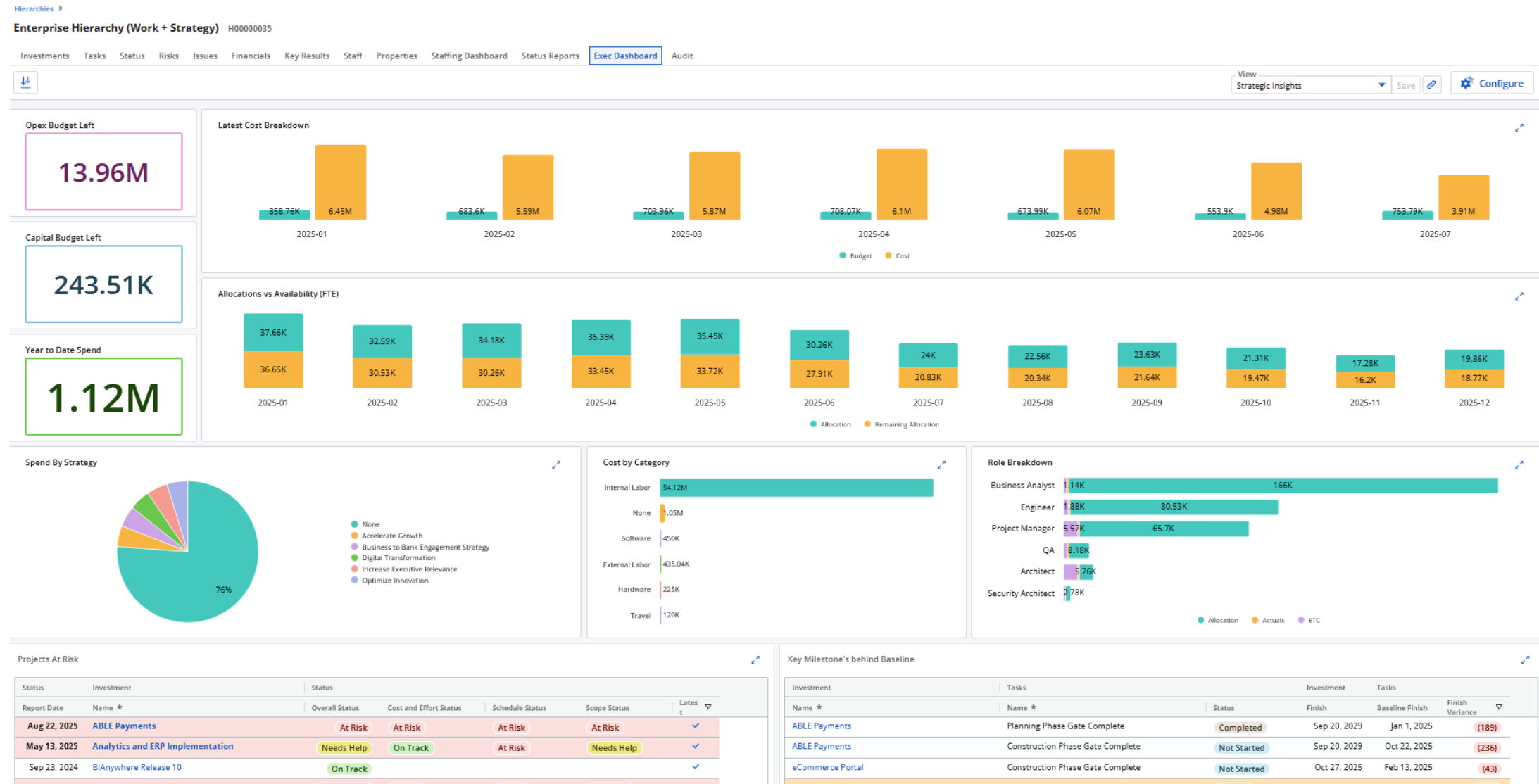
Enabled	Object
<input checked="" type="checkbox"/>	Assessment
<input checked="" type="checkbox"/>	Capacity %
<input checked="" type="checkbox"/>	Changes
<input checked="" type="checkbox"/>	Cross Value Stream Agreements
<input checked="" type="checkbox"/>	Customer Contacts
<input checked="" type="checkbox"/>	Decisions
<input checked="" type="checkbox"/>	Experience Data
<input checked="" type="checkbox"/>	Financials - Benefit Plan Details
<input checked="" type="checkbox"/>	Financials - Budget Plan Details
<input checked="" type="checkbox"/>	Financials - Cost Plan Details
<input checked="" type="checkbox"/>	Horizon %
<input checked="" type="checkbox"/>	Investments
<input checked="" type="checkbox"/>	Issues
<input checked="" type="checkbox"/>	Key Results
<input checked="" type="checkbox"/>	Lessons Learned
<input checked="" type="checkbox"/>	Measures
<input checked="" type="checkbox"/>	Risks
<input checked="" type="checkbox"/>	Staff

# Hierarchy Dashboard



# Hierarchy Dashboard

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# Page Canvas

## Enable Objects on Blueprint for Canvas

Administration > Blueprint >

Page - Lean Guardrails - EDIT MODE

Properties Modules Rules

Modules

Search...

New Channel New Canvas

- Audit
- Business Outcome Analysis
- Properties
- Guardrails
- New Canvas
- OKR Dashboard
- Portfolio Preview
- Product Analytics
- Program Detail
- Risks

Guardrails New Canvas

Configure - New Canvas

Name

New Canvas

Enabled	Object
<input checked="" type="checkbox"/>	Action Items
<input checked="" type="checkbox"/>	Changes
<input checked="" type="checkbox"/>	Issues
<input checked="" type="checkbox"/>	Risks
<input checked="" type="checkbox"/>	Tasks
<input checked="" type="checkbox"/>	To Dos

# Page Canvas

Name \*

My Work

Action Items

Open

Pending

Closed

▶ approve idea

Idea: [Chris' Demo Idea part 2](#)

63 Reviewers

Reject Approve

Priority: Low

▶ Idea submitted for approval

Idea: [Test SD](#)

Priority: Low

My Tasks Due in Next Two Months

Investment	Tasks	Investment	Tasks				
Name	Name *	Start	Finish *	Status	ETC	Actuals	Cost Type
Total							
Rajini Analytics and ERP Implementation	AP, AR, and Asset Configuration	Aug 29, 2024	Oct 24, 2025	Not Started	0	0	
Rajini Analytics and ERP Implementation	Closing Phase	Aug 29, 2024	Sep 24, 2025	Completed	0	0	
ACME 2.1 - JD	Collect evidence for approval	Aug 12, 2021	Sep 29, 2025	Not Started	0	0	
Rajini Analytics and ERP Implementation	Data Mapping and Migration Planning	Aug 29, 2024	Oct 24, 2025	Not Started	0	0	

1-9 of 9

My To Dos

Investment	To Dos					
Name	Name *	Completed	Status	Due Date	Related To	Related To Type
Rajini Analytics and ERP Implementation	Identify Source Systems and Data Owners	✓	Completed	Oct 11, 2025	Rajini Analytics and ERP Implementation	Project
Rajini Analytics and ERP Implementation	Inventory and Classify Data		Open	Oct 3, 2025	Rajini Analytics and ERP Implementation	Project

1-3 of 3

My Issues

Investment Name	Name *	Assigned To *	Status *	Priority *	Category Type
Meeting Reservation Portal	A list of all international rooms does not exist	Tanner, Paul	Open	Medium	Implementation
eCommerce Portal	Accept all possible popular pay methods	Martin, Paul	Open	Medium	Implementation
My Learning Mobile	Adaptive Security	Tanner, Paul	Open	High	Implementation

My Upcoming Milestones

Investment	Tasks							
Name	Name *	Start *	% Complete	Phase Name	Is Late	Open To Dos	Actuals	Gui
Rajini Analytics and ERP Implementation	AP, AR, and Asset Configuration	Oct 24, 2025	0%	Data Mapping and Migration Planning		0	0	
Rajini Analytics and ERP Implementation	Closing Phase	Sep 24, 2025	100%			0	0	
Rajini Analytics and	Deployment Phase	Sep 24, 2025	0%			0	0	

1-4 of 4

My Risks

Search...

Investment Name	Name *	Assigned To *	Status *	Impact	Category Type	Impact Date
Data Warehouse Performance Tuning	Base Architecture	Thompson, Peter	Open	Medium	Implementation	Mar 15, 2018
Online Order Entry	Budget not available for servers	Childers, Valerie	Open	High	Funding	Jun 4, 2017
KimT's Test Project	Budget Overruns	Admin, User1	Open	High	Funding	Apr 7, 2025
CRM Contact Center	Call Center analytics	Thompson, Peter	Open	Low	Objectives	May 13, 2017



# Exercise

---

- Create a project canvas
- Display the below
  - Project name
  - Status indicator
  - Manager
  - Number of open to-dos
  - Upcoming milestones
  - Planned cost
  - High-priority risks

# Reporting Workspace

Deep Dive

# What is New Reporting Workspace?

- Native reporting module within clarity
- GA from 16.3.3
- Provides a modern, integrated environment that enables no-code/low-code report creation
- Supports designing reports via an intuitive UI (drag-and-drop widgets, charts, tables, filters)
- Reports off the Data Warehouse

# What is it composed of?

## Reporting

Data Providers

Report Designer

Reports

- **Data Providers:**
  - Data Providers are at the core of the reporting workspace. These are customized data sources for your reports, built from Data Warehouse (DWH) objects and attributes
- **Report Designer:**
  - The Report Designer is where users can create and customize their reports.
- **Reports:**
  - The Reports tile in the Reporting workspace lets you view and manage published reports.

# Data Provider

- Disabled by default, enable in Feature Toggles -> Reporting: Data Providers

Name *	Description ↑	Introduced In Rel...	Expires In Release	Ena...	Last Updated By
Reporting: Data Providers	When this feature is enabled, the Reporting m...	16.3.0	16.4.0	✓	Wang, Lulu

- Objects
  - DWH enabled objects and fields
- Queries
  - Build your own SQL against DWH
  - Can be used together with objects
- Joins
  - All objects and queries must be JOINed together
- Pre-filters
  - Reduce data size and optimize performance
- Security
  - On/off
  - Master object of investment or resource
- Preview
  - View query
  - Export to CSV

Reporting ▶

## Data Providers



New Data Provider

Select all Deselect all

Group By	
	Name * ↑
<input type="checkbox"/>	Investments
<input type="checkbox"/>	Ideas
<input type="checkbox"/>	Changes across Investments
<input type="checkbox"/>	Risks across Investments
<input type="checkbox"/>	Issues across Investments
<input type="checkbox"/>	Staff across Investments
<input type="checkbox"/>	Tasks across Investments
<input type="checkbox"/>	Status Reports across Investments
<input type="checkbox"/>	To Dos on Investments
<input type="checkbox"/>	Time Entries and Timesheets
<input type="checkbox"/>	Time Entry and Timesheet Notes

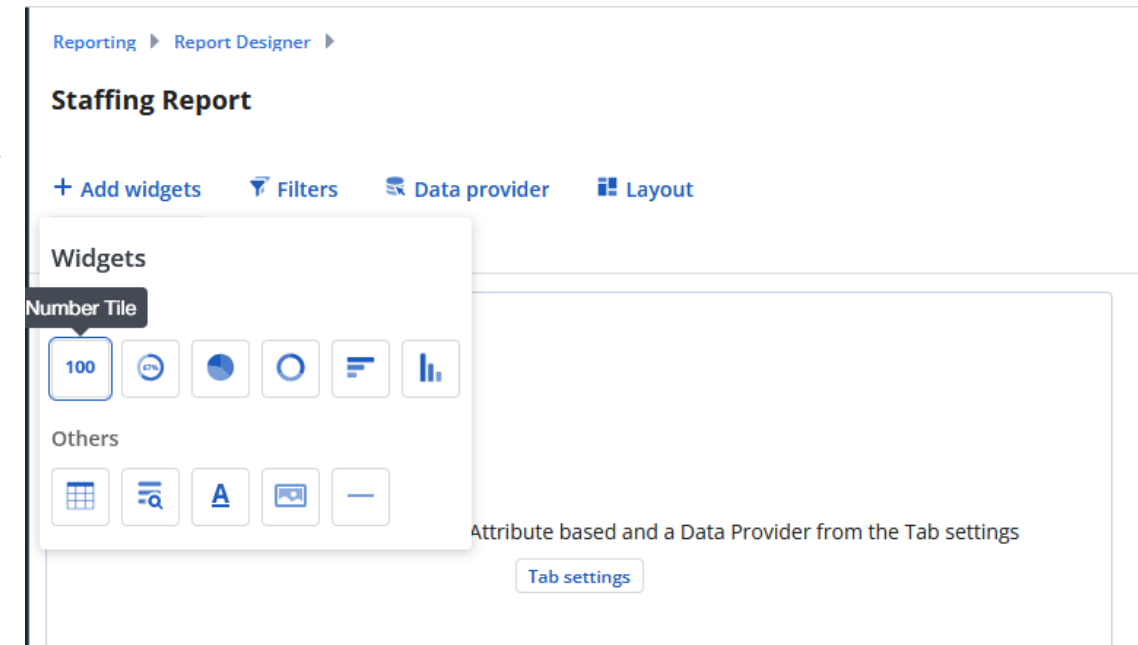


# Report Designer

Enabled by default, enable in Feature Toggles -> Reporting: Report Designer

Name *	Description ↑	Introduced In Rel...	Expires In Release	Enabled	Last Updated By
Reporting: Report Designer	When this feature is enabled, the Reporting m...	16.3.0	16.4.0	✓	Wang, Lulu

- Select Data Provider(s)
- Add Widget
  - Number Tile, Progress Ring, Pie Chart, Bar Chart, Table, Attribute Group, Text/Link, Image, Line
- Configure Filter
  - Report level, tab level, widget level, interactive
- Adjust Layout
  - Responsive, Fixed, Data Extraction (CSV)
- Preview and publish Report



# Reports

Enabled by default, enable in Feature Toggles -> Reporting: Reports

Name *	Description ↑	Introduced In Rel...	Expires In Release	Enabled	Last Updated By
Reporting: Reports	When this feature is enabled, the Reporting m...	16.3.1	16.4.0	✓	Wang, Lulu

- View the Reports Grid
  - Available reports
  - Scheduled reports
  - Reports Library
- Filter, Export, and Favorite Report
- Schedule or Pause Report
  - Fixed and CSV extraction layout only
  - Published active reports only
  - Custom filters
  - Can share with people or groups without report security rights

## Reports

Available Reports

Scheduled Reports

Reports Library



Group By

Name ↑

Description

# OKR Overview

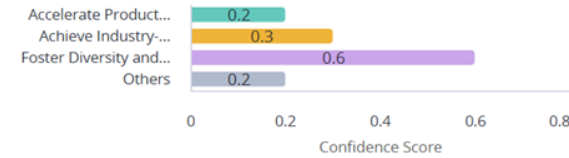
45

## OKR Overview

## Key Results



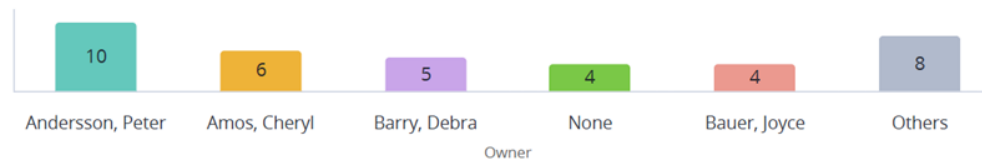
### At Risk



### Strategy



### Objective Count by Owner



### Key Results

Key Result		
Name ↑ *	Owner	Progress
Achieve 100% compliance with GDPR and CCPA for all global data handling and processing by the end of Q4.	Bauer, Joyce	70%
Achieve ISO 27001 certification for cybersecurity across all global offices by Q2.	Amos, Cheryl	75%
Achieve a 25% reduction in lead times through supplier diversification and logistics optimization.	Amos, Cheryl	40%
Achieve a 30% reduction in IT infrastructure costs by migrating legacy systems to the cloud by Q2.	Andersson, Peter	20%
Achieve a 95% customer satisfaction rate for digital support (e.g., chatbots, help centers, AI-driven self-service tools).	Dixon, Danielle	60%
Achieve a customer satisfaction (CSAT) score of 90% for newly launched products.	Carmen, Ed	38%
Achieve a global Net Promoter Score (NPS) of 85 by improving customer satisfaction and loyalty programs.	Andersson, Peter	50%

# Project Storyboard

Name

AAA Purchase Requisition Commitment Tracking Module - Sarah

Start

Jan 2, 2023

Finish

Apr 19, 2028

Allocations

4.49

Actuals

0

Project Dates

Status Report Indicators

Manager

Young, Matt

Cost Type

Operating

Stage

Status Indicator

Progress

Not Started

Work Status

Requested

Schedule Status

Scope Status

Cost and Effort Status

Financial Performance

budget

0

actuals

0

remaining\_forecast

0

forecast

0

remaining\_budget

0

budget\_vs\_forecast

0

Issues by Priority

1

1

Low

Medi..

Risks by Priority

None

Current Issues

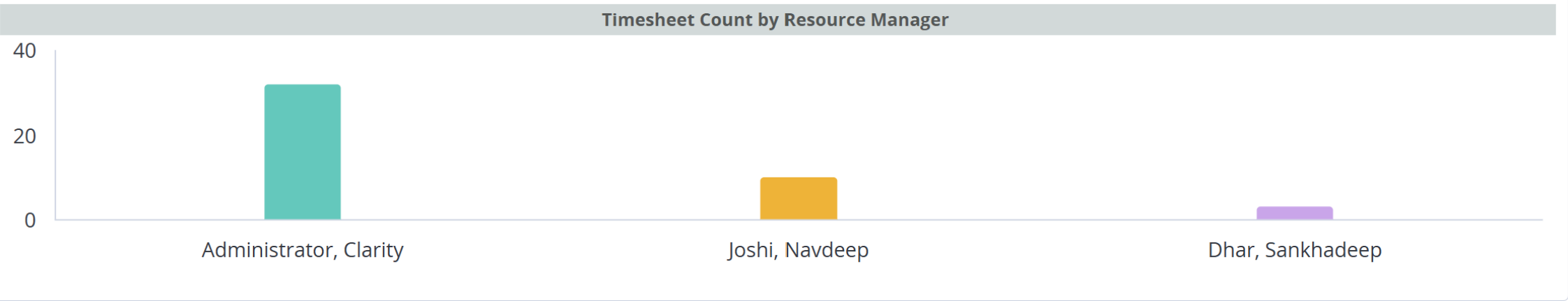
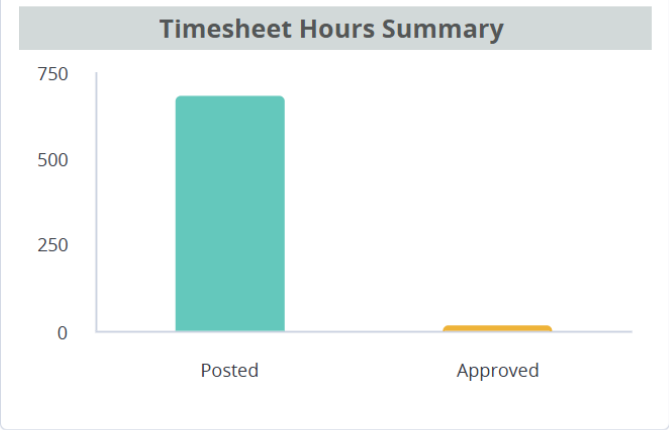
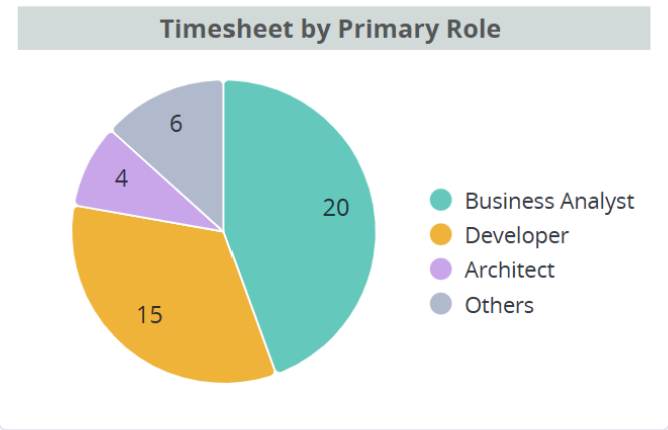
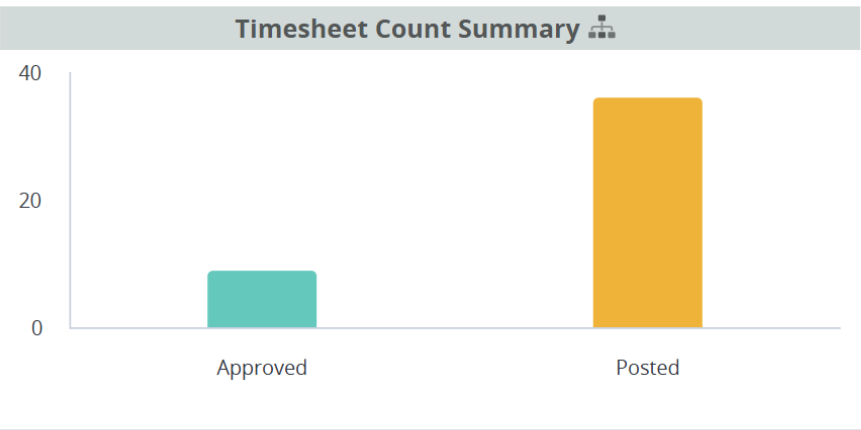
Issue		
Assigned To ↑ ★	Name ★	Status ★
McCarthy, John	Issue 2	Open
Washington, George	Issue 1	Work in Progress

1 - 2 of 2 |< < > >|

# Timesheet Summary

Timesheet Summary

Timesheet Details





# Remaining Allocation

Timesheet Summary

Timesheet Details

Remaining Allocation

+

## Remaining Allocation by Primary Role -> Resource

<div> <div></div> <div>Primary Role</div> <div>&gt;</div> <div>Full Name</div> <div></div> </div>								
Full Name	Investment	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026
	Name *	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...	Remaining Allo...
> None		3	0	0	0	0	0	0
√ Architect		(30)	(30)	(30)	(30)	(30)	0	0
> Admin, User15		0	0	0	0	0	0	0
√ User02, Jasper...		(30)	(30)	(30)	(30)	(30)	0	0
	Franklin Templeton	0	0	0	0	0	0	0
	Edelweiss Financial	(30)	(30)	(30)	(30)	(30)	0	0
> Architect		0	0	0	0	0	0	0
> Business Analyst		(34)	(34)	(34)	(34)	(34)	0	0
> Data Analyst		0	0	0	0	0	0	0
> Developer		(1)	(1)	(1)	(1)	(1)	0	0
> Project Coordin...		2	1	1	1	1	1	1
> Project Manager		0	0	0	0	0	0	0
> Project Manager		0	0	0	0	0	0	0
> Test Engineer		0	0	0	0	0	0	0

# Timesheet Status

[Missing Time Summary](#)
[Timesheet Details](#)


<div> <span>Manager</span> </div>						
Full Name	Resource			Timesheet		ASSIGN_PER_FA...
	Resource ID *	Resource Type	Primary Role	Time Period *	Status	actual_hours
> Administrator, Clari... (32)						392
> Dhar, Sankhadeep (3)						64
▼ Joshi, Navdeep (10)						240
Admin, User11	AUser11	Labor	Developer	30-APR-25 - 06-MAY-25	Posted	8
Admin, User11	AUser11	Labor	Developer	30-APR-25 - 06-MAY-25	Posted	32
Admin, User11	AUser11	Labor	Developer	23-APR-25 - 29-APR-25	Posted	24
Admin, User11	AUser11	Labor	Developer	23-APR-25 - 29-APR-25	Posted	24
Admin, User12	AUser12	Labor	Project Coordinator	05-FEB-25 - 11-FEB-25	Posted	24
Admin, User12	AUser12	Labor	Project Coordinator	29-JAN-25 - 04-FEB-25	Posted	24
Admin, User12	AUser12	Labor	Project Coordinator	05-FEB-25 - 11-FEB-25	Posted	16
Calderon, Mindy	mcalderson	Labor	Test Engineer	30-APR-25 - 06-MAY-25	Posted	40
Calderon, Mindy	mcalderson	Labor	Test Engineer	09-APR-25 - 15-APR-25	Posted	24
Calderon, Mindy	mcalderson	Labor	Test Engineer	23-APR-25 - 29-APR-25	Posted	24

# Key Features So Far, with More on the Way

---

- Group By
- Drill Through
- Per-Period Metrics
- Textbox with Link
- Image
- Pie/Bar chart color coding by Studio Color Mapping
- HEX color coding
- Filters Hide/Lock/Required
- CSV Extraction layout option
- Editable PPT export
- Scheduling
- Email to external users
- Add as Menu Item

# Best Practices

- Standardize naming conventions – Data Providers, Reports
- Call out Custom Data Providers
  - OOTB Data Providers not available in Reporting Designer
- Data Provider Filters for better performance
  - Pre-Filter
  - Join Filter
- JOIN on key (numeric) instead of name (character)
- Know your expected layout early – Responsive vs Fixed vs CSV
  - CSV extraction reports can't be converted to other types

# Reporting Security

Role	Suggested Rights
Report User	Reporting - Navigate
Data Provider Admin	Reporting - Data Provider - Navigate, Create, View, Edit, Delete, Copy
Query Builder	Reporting - Query - Create, View, Edit, Delete, Copy
Report Designer	Reporting - Report Designer - Navigate, Create, View , Edit, Delete, Copy
Report Viewer	Reporting - Report Viewer , Reporting - Available Reports - Navigate, Reporting - Reports Library - Navigate
Scheduler	Reporting - Report Schedule - Navigate, Create, View, Edit, Delete Reporting - Scheduled Reports - Navigate



# Reporting Security

- Associate the hidden report object with OBS for OBS Security

**Associated Objects**

<input type="checkbox"/>	Object	
<input type="checkbox"/>	Application	Any Unit ▾
<input type="checkbox"/>	Asset	Any Unit ▾
<input type="checkbox"/>	Idea	Any Unit ▾
<input type="checkbox"/>	Other Work	Any Unit ▾
<input type="checkbox"/>	Process Definition	Any Unit ▾
<input type="checkbox"/>	Product	Any Unit ▾
<input type="checkbox"/>	Project	Any Unit ▾
<input type="checkbox"/>	Report	Any Unit ▾
<input type="checkbox"/>	Resource	Any Unit ▾
<input type="checkbox"/>	Service	Any Unit ▾

Reporting ▶

## Report Designer



New Report

Select all Deselect all

Group By		
	Name ★ 1↑	Department OBS
<input type="checkbox"/>	Copy Project Storyboard	Corporate:IT/Business Operations/Finance
<input type="checkbox"/>	Investment Dashboard Reponsive	Corporate:IT/Shared Services

# System Options

- Check **Include SQL Curve data** to enable Per-Period Metrics in new reporting module
- The **Instantaneous Sync** feature enables near real-time synchronization of data between Clarity and the Data Warehouse

## INCLUDE SQL CURVE DATA



( SQL Curve tables for time-varying attributes will be created in the data warehouse schema as an alternative to the Fact tables. In the new user experience, SQL Curve tables are required in Object-based Data Providers to display Per-Period Metrics. )

## ENABLE INSTANTANEOUS SYNC



( Most updates to the data warehouse will occur in near real time when Clarity data is changed. SQL Curve tables will be updated but the Fact tables will not. )

# Instantaneous Sync

- Toggled off by default
- Unsupported synchronizations
  - Fiscal time period updates
  - Baseline updates
  - Time entries on timesheets (Modern UX)
  - Static lookup value renames
  - XOG using ODF (except Project and its task, team, assignment, risk, issue, change)
  - Direct db. updates using GEL scripts

# Choosing the Right Reporting Tool

Scenario	Purpose / Description	Best Tool to Use	Why	Example
What's happening right now across projects?	Real-time or near real-time tracking	Canvas	Visual, interactive, and supports live data and updates	Portfolio Overview
Are we staying on track over time?	Identify trends, patterns, variances	Canvas, Clarity Reporting	Allows comparison over time with visual insights	Forecasted vs PI by Time
What do I need to know for my role?	Role-based data for planning and decisions	Views, Canvas, Clarity Reporting	Targeted info per persona; Canvas provides consolidated information	Status Reports, OKR review for strategic leadership persona
What do executives need to see at a high level?	Summary of key initiatives across portfolio	Canvas (with hierarchy), Clarity Reporting, External Tools	High-level roll-up; hierarchy support	Executive Portfolio Preview
I need a quick answer to a one-time question.	Self-service, user-driven exploration	Canvas, Report Designers (Clarity Reporting)	Empowers users to build their own reports, explore data independently, and adjust filters or visuals without IT support	Custom chart showing allocation hours for a quarter
I want a pre-built, formatted report I can reuse.	Predefined, consistent layout reports	Clarity Reporting, External Tools	Reliable format, often required for compliance	Financial Report, Resource Summary
I need to export detailed data or print structured reports.	Repeating sections, data extracts, batch printing	Data Extractors, Clarity Reporting, External Tools	Best for formal reports and high-volume data	Project Storyboard
I want to tell a visual story about an entity or outcome.	Visual summaries with interactive components	Canvas, Clarity Reporting, External Tools	Combines multiple data points into one view, executive insights	Project Health Dashboard, KPI Storyboards







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Rego is excited to continue our **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.

# Surveys

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



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## Instructions for PMI credits

- Access your account at [pmi.org](https://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 = **Rego University**
- 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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# Continue to Get Resources and Stay Connected

- 1 Use [RegoXchange.com](https://RegoXchange.com) for instructions and how-tos.
- 2 Talk with your account managers and your Rego consultants.
- 3 Connect with each other and Clarity experts at [RegoGroups.com](https://RegoGroups.com).
- 4 Sign up for webinars and join in-person Rego groups near you through at [RegoConsulting.com](https://RegoConsulting.com)
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