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SAN ANTONIO • 2026

Building Reports in Clarity's New Reporting Feature

Your Guides:
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Agenda

- Level-Set (~20 min)
  - Ecosystem
  - Building Blocks
  - Reporting Lifecycle
- Hands-On Reporting (~125 min)
  - User
  - Report Designer
  - Admin
- Wrap-Up and Q&A (~15 min)

Demo & Hands-On Exercises

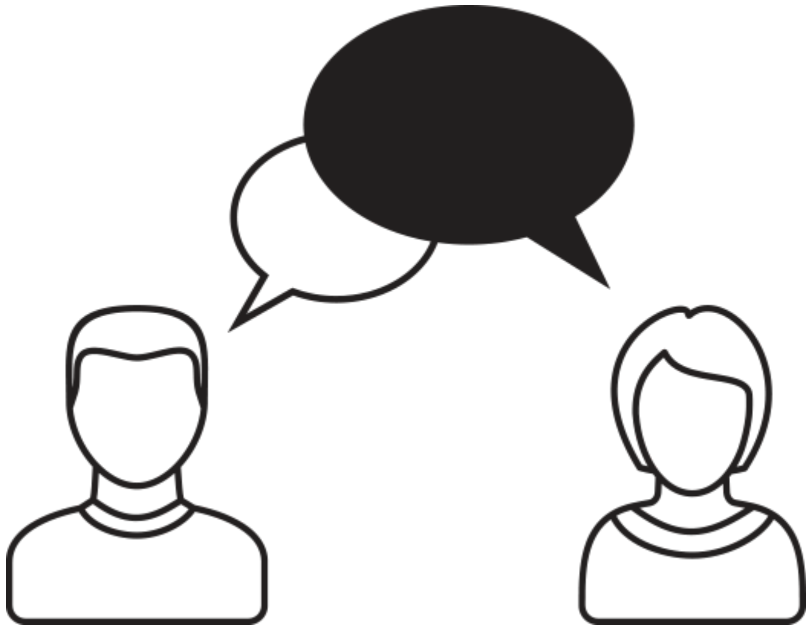
Log in to the training environment

Get Set Up

- Grab your assigned login (this will be “JUSER” followed by 2 numbers)
- URL https://tinyurl.com/RegoUReport
  or full URL
  https://clarity-fresh01.rego-internal.moventus.com/pm/
- Password is Niku@345!
- Stuck? Flag down a facilitator

Introductions

- Take 2 Minutes
- Meet the Person Next to You
- They’re Your Buddy if You Get Stuck



Jaspersoft Reporting is Retiring

Reminder — if your organization used Jaspersoft, those reports are not available in Clarity starting in version 16.4.3

Key Dates

- SaaS: removed as part of the 16.4.3 upgrade — September 11, 2026
- Full End of Life for enhancements & support — September 30, 2026
- On-prem: Level 1 support continues “as-is” until you upgrade to 16.5

Clarity Reporting Workspace Overview

Clarity native reporting in MUX — GA from 16.3.3

What It Is

- A more modern, configurable reporting experience
- No-code / low-code report design
- Relies on the Clarity Data Warehouse (DWH)
- Build dashboards or schedulable reports
- Export to PPTX, PDF, CSV or XLSX

Streamlined Design
Reusable, ready-made datasets from Data Providers

Operational Efficiency
No context-switching, no separate credentials

Contextual Experience & Drill
Drill straight to the linked Clarity investment

Unified Security
Inherits your Clarity access rights automatically

Access & Prerequisites

What's already happened behind the scenes

Reporting Enablement FYI

- Reporting relies on the Data Warehouse and the SQL curve option must be enabled in System Options
- Attributes are still added to the Data Warehouse from Objects, and we still use the Load Data Warehouse job
- Instantaneous Sync can make data available faster
- Full permissions reference is in the appendix
- Reporting is enabled and Logins are pre-provisioned for today — nothing to configure

Building Blocks

Data Providers

- Connects to Clarity Data Warehouse
- Combines data from multiple objects and/or queries
- Allows developers to define joins, filters, and calculations
- Simplifies data for use in Report Designer
- Security is applied here
- Can be used by one or more reports

Report Designer

- Report Designer provides an intuitive, no-code interface
- Build reports from active, published Data Providers
- Create visualizations using charts and tables with configurable settings
- Validate data with Preview or Export before sharing

Reports

- Reports tile is a read-only interface that lists all the reports a user can access
- Supports reports execution, scheduling, sharing and export
- Users may also access reports added by Admins on the Navigation bar, or embedded in Blueprints (for example, a tab on an Investment or Page)

Creating a Report from the Ground Up

1

Create or copy a Data Provider

- Update objects, fields, queries, joins, and filters

2

Build the report in Report Designer

- Use Data Providers as the data source
- Configure report settings, add tabs and widgets, apply filters
- Validate and publish

3

View the report in Reports

- Grant report and Data Provider access
- Embed in a Blueprint or add to navigation menu
- Schedule and email reports
- Promote across environments

Creating a Report by Copying Sample Reports

1

Copy a report in Report Designer

- Copy or map the associated Data Provider
- Add custom attributes to the Data Provider, if needed

2

Update the report in Report Designer

- Configure report settings, add tabs and widgets, apply filters
- Validate and publish

3

View the report in Reports

- Grant report and Data Provider access
- Embed in a Blueprint or add to navigation menu
- Schedule and email reports
- Promote across environments

Report Layout Formats

Fixed

- Static, precise placement
- Best for PDF/PPTX export
- Can be scheduled
- Size & orientation configurable

Responsive

- Interactive, filter-responsive
- Built for screen exploration
- Cannot be scheduled
- Max width: HD / Laptop / Tablet

CSV (Data Extraction)

- One data provider, one table
- Optimized for CSV export
- Can be scheduled
- No tabs

Table (XLSX)

- New in 16.4.3
- Grid of rows and columns
- Exports directly to Excel
- Can be scheduled
- Best for detailed data review

Meet Your Personas

User	Report Designer	Admin
View, filter & interact with existing reports	Copy & modify reports, schedule	Modify a Data Provider

What We’re Building Today

Same building blocks, same lifecycle you just saw — now in action

Today’s Builds

- Fixed report: Capacity vs Demand by Resource
- Responsive report: KPIs by Project Type Dashboard
- Modify a Data Provider

Demo & Hands-On Exercises

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Get Set Up

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 or full URL
 https://clarity-fresh01.rego-internal.moventus.com/pm/
- Password is Niku@345!
- Stuck? Flag down a facilitator

Persona: User

You are now a report viewer.

Access Existing Reports

Everything here works with zero design rights

What You Can Do

- Click to filter and unfilter
- Access subreports
- Tour Available Reports / Scheduled Reports / Reports Library
- Revert — undo your exploring back to last saved
- Favorite a report (star icon)
- Export a single table to Excel
- Export formats:
  - Fixed → PDF/PPTX · Responsive → view-only · CSV → .csv only · Table → Excel

Persona: Report Designer

You are now building.

Demo: Modify a Fixed Report

Capacity vs Demand by Resource — copied, not built from scratch

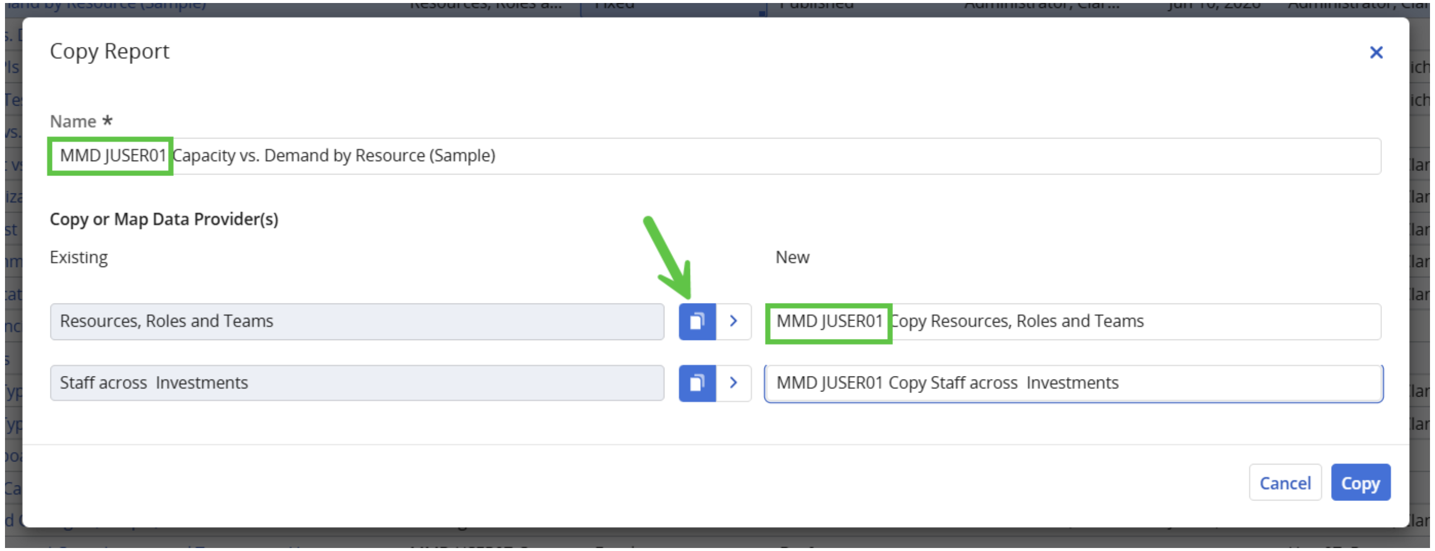
What We'll Cover

- Copy a Report and create new Data Providers
- Widget types
- Table config — rename, align, hide, aggregate
- Display mapping
- Filter options — report / tab / widget level
- Report footer (Fixed layout only)

Class Exercise: Copy a Fixed Report

Your turn — same steps, your own copy

1. Navigate to Report Designer
2. Right-click on the report row
3. Select Copy
4. Enter your Initials and User Name before the Report Name
5. Select the box(es) to create new Data Provider(s).
6. Enter your Initials and User Name before the Data Provider Name



Naming convention:
Add your Initials + User Name to your Report and Data Provider

Class Exercise: Edit Fixed Report

Your turn — same steps, your own copy

Your Turn

1. In the Capacity vs Demand report, add a new tab – My Allocation Report
2. Add a number tile that shows the count of Resources (Use Resource Data Provider)
3. Add a pie chart that shows Sum of Allocations by Primary Role (Use Staff Data Provider)
4. Add a column bar chart that shows Allocations by Period (Use Staff Data Provider)
5. Add a table that shows Resource Manager, Resource, Primary Role, and Allocation by Period (Use Staff Data Provider)

Demo: Attribute Groups

A quick look at a more advanced widget

How It Works

- Displays related summary fields together
- Drives filters for other widgets on the same tab
- Requires Report Type = Attribute Based
- Reference: the Project Status Report sample

Demo: Scheduling a Report

Getting your report to run — and land in inboxes — on its own

What We'll Cover

- Fixed, Tables (XLSX) and Data Extraction (CSV) layouts can be scheduled
- Tabs: Schedule, Filter, Export, Recipients, Email content
- Copy an existing schedule — lands Paused
- "Do not send emails for empty reports"
- Publish first — unpublished edits never run
- Report Bursting
- Purge Reports job

Class Exercise: Scheduling

Schedule the report you just built

Your Turn

- Schedule the Fixed report you just modified

Demo: Modify a Responsive Report

Create a new report, starting with KPIs by Project Type Dashboard

- Copy Widget & Copy to Clipboard
- Modify a Table
- Preview the report and test Interactive filtering
- Export a table to Excel
- Add Widgets and Change Widget Types
- Create a drill report
- Add Help / Self-service information

Example

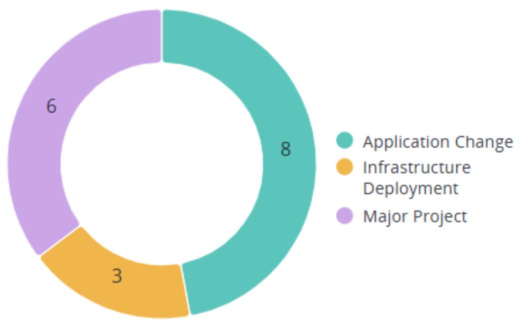
2026 RegoU Responsive KPIs by Project Type Dashboard

Unit of measure: Hours | Period: Jul 1, 2026 - Jun 30, 2027 | 5 | Filter: None | Save | Re

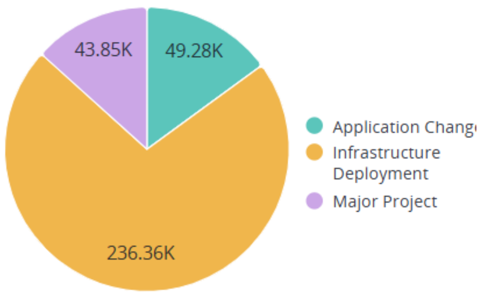
KPIs by Project Type | Business Alignment | How-To

Project Type	Definition
Application Change	Enhancement, fix, or update to an existing application.
Infrastructure Deployment	Deployment or upgrade of underlying technology platforms.
Major Project	Large, strategic initiative with broad business impact.

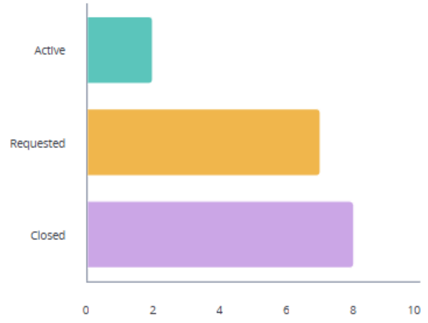
Projects by Type



Allocation by Type



Work Status

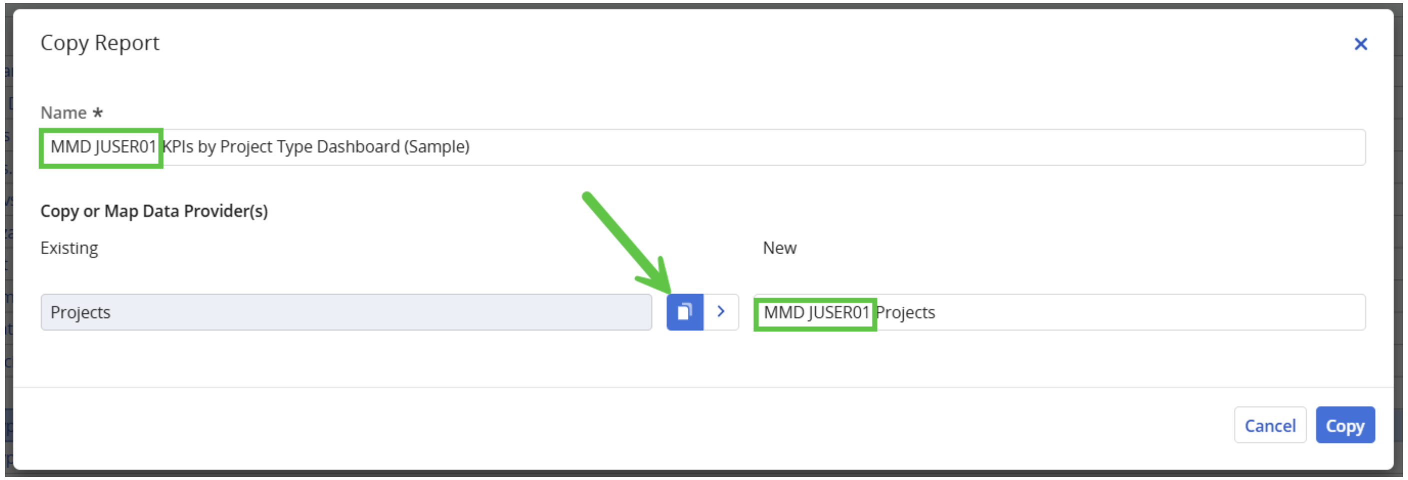


Project Type / Project	Overall Status	Manager	Start	Finish	Sponsor	Business Alignment	Risk Score	Totals Allocation	Jul 1, 202... Allocation	Oct 1, 20... Allocation	Jan 1, 20... Allocation	Apr 1, 20... Allocation
Total								**329,486**	**83,482**	**83,482**	**80,952**	**81,569**
Application Change								**49,277**	**12,461**	**12,461**	**12,083**	**12,272**
2026 RegoU Project	Needs Help	Young, Matt	Aug 12, 2021	Sep 16, 2027	Roberts, Beth	54	25	7,726	1,954	1,954	1,894	1,924
ACME 2.1 -Rego U demo	Needs Help	Admin, User10	Aug 12, 2021	Sep 16, 2027	Roberts, Beth	54	25	5,638	1,426	1,426	1,382	1,404
AUSER22 - TWH	Needs Help	Admin, User22	Aug 12, 2021	Sep 16, 2027	Roberts, Beth	54	25	5,638	1,426	1,426	1,382	1,404
Copy ACME 2.1 - JD - Jaime Rego U demo	Needs Help	Admin, User23	Aug 12, 2021	Sep 16, 2027	Roberts, Beth	54	25	5,638	1,426	1,426	1,382	1,404

Class Exercise: Copy a Responsive Report

Create your own copy of the sample report

1. Navigate to Report Designer
2. Right-click the report **KPIs by Project Type __Dashboard__ (Sample)**
3. Select Copy
4. Enter your Initials and User Name before the Report Name
5. Select the box to create a new Data Provider and add your Initials and User Name before the DP Name



Report to copy: KPIs by Project Type **__Dashboard__** (Sample)
Add your Initials + User Name to your Report Name and Data Provider

Class Exercise: Copy a Responsive Report

Create your own copy of the sample report

1. Navigate to Report Designer
2. Right-click in the row for report **2026 RegoU KPIs by Project Type Dashboard (Sample)**
3. Select Copy
4. Enter your Initials and User Name before the Report Name

Alternate version

Report to copy: KPIs by Project Type **Dashboard** (Sample)
Add your Initials + User Name to your Report Name

Class Exercise: Modify a Responsive Report

Use Case: You want a report like the KPIs by Project Type Dashboard report, but your organization doesn't do Cost Forecasting

1. Copy the KPIs by Project Type **Dashboard** Report (sample)
2. Delete the Planned Cost pie chart
3. Copy the Projects by Manager widget and change it to show Projects by Work Status
4. Remove Planned Cost from the table
5. Group the table by Manager

Demo: Create a Data Extraction report

What We'll Cover

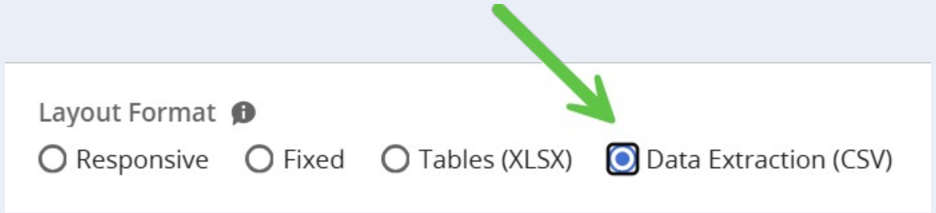
- Create New Report with Type Data Extraction
- Use Case: Export Resource Remaining Availability
- Review Settings – Unit of Measure, Period Selector

Exercise: CSV Extract Report

The simplest layout in Clarity Reporting

Your Steps

1. Navigate to Reporting → Report Designer and click New Report
2. Select one of the Data Providers you copied earlier
3. Use the menu to add columns to the report
4. Explore options under Setup and Format (there are not many!)



Persona: Admin

Modify a Data Provider: Best Practices

- Don’t create a DP for each report. Create standard Data Providers that meet most report needs
- Copy sample Data Providers that best fit your organization’s needs
- On the Objects tab, Add ‘in-use’ data and remove unused objects and attributes
- Apply security - Investment / Resource / Hierarchy / Roadmap
- Check the contents using the Preview tab

Modify a Data Provider: Demo

- Add Attributes
- Add Objects
- What happens when you add too many subobjects → you get one row per combination
- Joins — Inner / Left / Right / Full; join on numeric key
- Queries & Data Warehouse Schema Explorer

Demo: Display Mapping & Calculated Attributes

Two features that make data easier to read and richer to use

- Display mapping — assign colors to a range or lookup values
- Via the attribute’s Details flyout
- Calculated attributes — now defined directly in the Data Provider (16.4.1+)

Class Exercise: Data Provider

Your Steps

- Navigate to Reporting → Data Providers
- Open a Data Provider that you created
- In the Objects tab, add 1-3 attributes from an existing object
- Check the new data on the Preview tab
- Publish
- If time permits: create a calculated attribute

Demo: Make It Visible

Prerequisite: report must be Active + Published

- Add directly to the Navigation bar
  Administration → System Settings → Navigation Menu
- Add to pages
  Add to Module: Report to a Page Blueprint → Create/Update Page to use that Blueprint
- Add to Blueprint tabs — static embed, or with Parameters to auto-filter

Advanced Options

- VAIA — AI agent integration
- Migrator — move Data Providers & Reports across environments
- Purge Reports job — keep the Reports Library clean
- Known limitations & output limits

VAIA

How It Works

- An active published CSV report can feed a Vaia agent prompt as a data source
- Optional context-mapping to a specific object instance
- In Report Designer, the AI Agents column shows which agent(s) use a report

Migrator (Import/Export)

Moving Data Providers and Reports between environments

How It Works

- Migrate via a unique migration key
- Export shows up as a bell notification when complete
- Import on the target environment to bring it in

Purge Reports Job

Keeping the Reports Library from growing forever

How It Works

- Scheduled job that cleans up the Reports Library over time
- Purge by format, report name, or run date
- Doesn’t delete the reports themselves — just stored outputs

Known Limitations

A few things worth knowing before you hit them

Good to Know

- Can’t export Gantt or Bubble charts
- 50K TSV record cap per widget
- 100 periods per attribute; 900 total periods/metrics per widget
- PDF/PPTX exports capped at 500 pages

Further Learning Resources

Where to go after today

Keep Going

- Broadcom Software Academy Simulation Lab — hands-on practice environment
- Enroll in “Clarity 16.x – Reporting Essentials”
- Broadcom TechDocs: Working with Reporting section

Q&A

Earn Rego University Certifications and Professional Specializations

Your participation in this class may count toward Rego University certification progress.

Certifications

Build recognized Clarity expertise.

Complete 10 eligible learning units within a certification track.

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Professional Specializations

Deepen your skills in focused topic areas.

Complete 4 eligible learning units within a selected specialization, with the option to earn multiple specializations.

Artificial Intelligence (AI)

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Technical

***Important:* Complete the class survey in the app after each session so your credits can be tracked.**

More info: https://regouniversity.com/certificates

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- Click on **Certifications**
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- Click on **Visit CCRs** button under the **Report PDUs**
- Click on **Report PDUs**
- 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**
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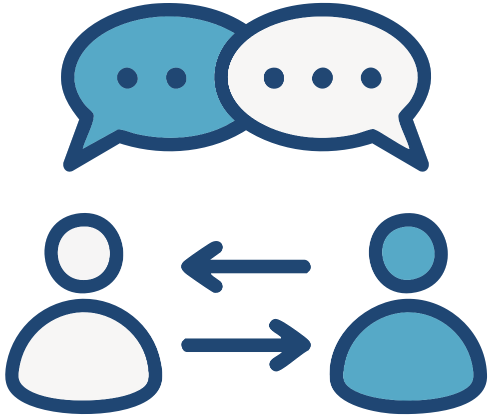


Appendix

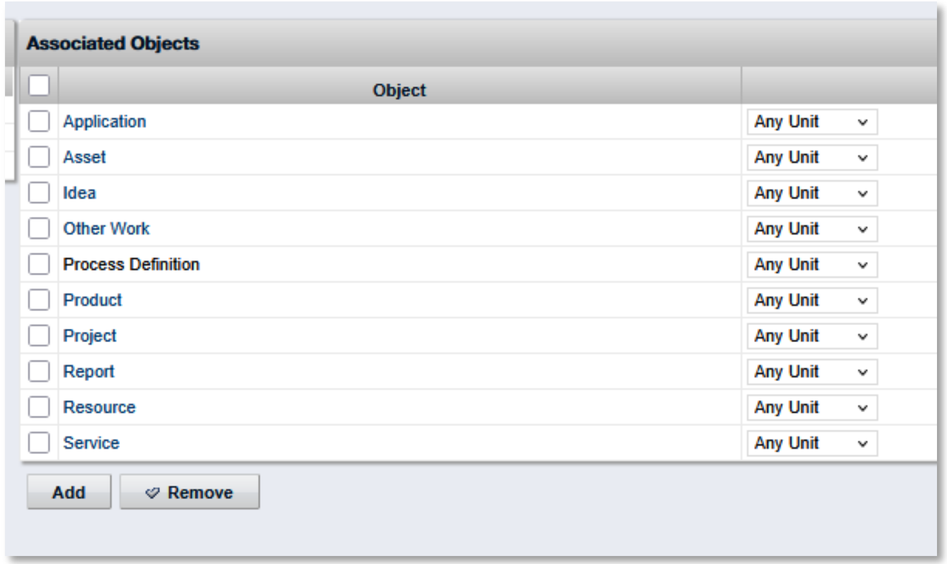
Reference: Required Permissions

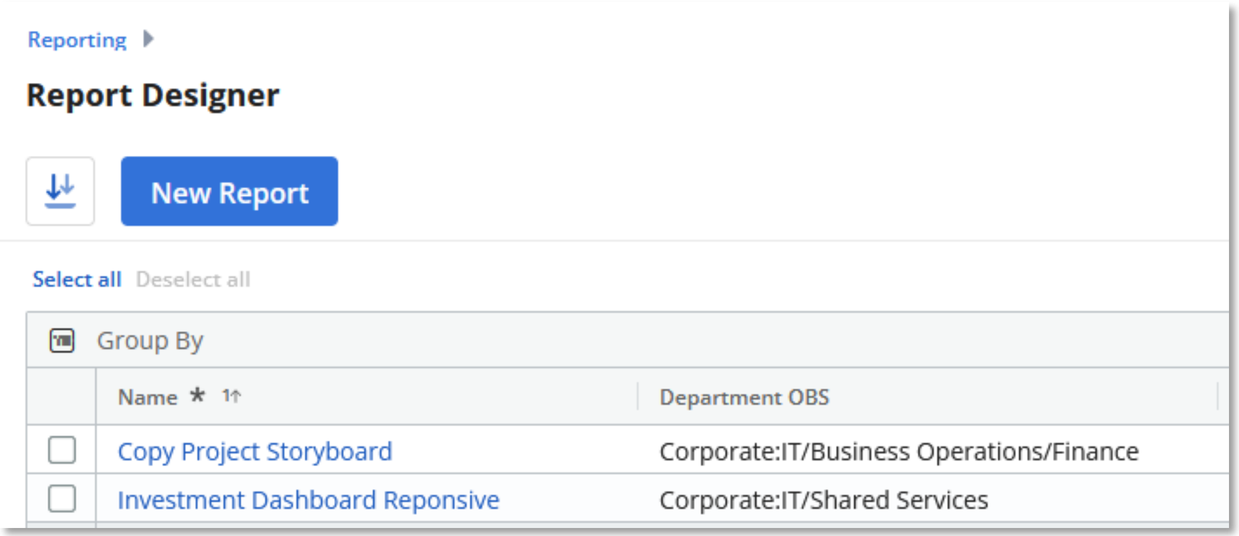
Rights are assigned in Classic Administration

Role	Suggested Rights
All Report Users	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 *see next slide for options Reporting - Available Reports – Navigate Reporting - Reports Library - Navigate
Scheduler	Reporting - Report Schedule - Navigate, Create, View, Edit, Delete Reporting - Scheduled Reports - Navigate

Report Viewer Access

- Global View Access is not recommended
- Provision Viewer Access to individual reports using Instance rights or Associate the report object with OBS for OBS Security





Adding Objects/Attributes to the Data Warehouse

The process to add custom attributes to the Data Warehouse has not changed

- Data Providers show data from the Data Warehouse. If an object or attribute is not available to be added to a Data Provider, you may need to add it to the Data Warehouse.
- In Classic, navigate to Administration → Studio → Objects. Open the Object.
- If the Object is not added to the Data Warehouse, check the INCLUDE IN THE DATA WAREHOUSE checkbox on the Properties page
- To add attributes, click on the Attributes tab, select the attributes and check INCLUDE IN THE DATA WAREHOUSE. You can do this on the list view, or in the properties page for individual attributes

Reference: Data Warehouse Prerequisites

Reporting reads from the DWH, not the live transactional database

Keep These Current

- Run Load Data Warehouse (Full Load) to populate/refresh the schema
- Run Load Data Warehouse Access Rights — required for security to sync
- Enable Include SQL Curve Data for per-period metrics (requires a Full Load after)
- Schedule Incremental Load Data Warehouse jobs, or Enable Instantaneous Sync for near-real-time metadata & curve availability

Reference: Reporting Workspace Best Practices

A few habits that keep a reporting environment healthy long-term

Data Providers, Designer & Reports

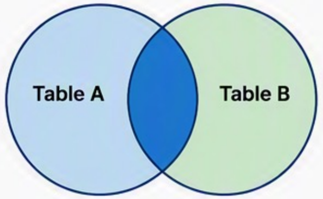
- Standardize naming; centralize enterprise Data Providers
- One Data Provider per domain/sub-object — avoid duplicates
- Join on numeric key, not name; avoid “not equal to” and full joins where possible
- Decide layout early — CSV can’t convert to another type later
- Pause schedules before a DB refresh; publish before scheduling or migrating

Reference: Joins

TYPES OF JOINS

Joins combine rows from two tables based on a related column.

INNER JOIN



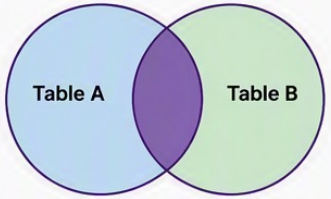
Returns only the rows that have matching values in both tables.

```
SELECT *
FROM A
INNER JOIN B
ON A.key = B.key;
```

RESULT

A.key	A Data	B.key	B Data
1	A1	1	B1
2	A2	2	B2

FULL OUTER JOIN



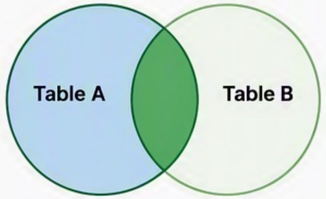
Returns all rows when there is a match in either table. If there is no match, the columns from the other table will be NULL.

```
SELECT *
FROM A
FULL OUTER JOIN B
ON A.key = B.key;
```

RESULT

A.key	A Data	B.key	B Data
1	A1	1	B1
2	A2	2	B2
3	A3	NULL	NULL
NULL	NULL	4	B4

LEFT OUTER JOIN



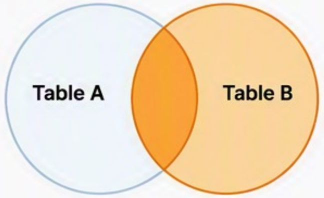
Returns all rows from the left table (A) and the matched rows from the right table (B). If no match, columns from B will be NULL.

```
SELECT *
FROM A
LEFT JOIN B
ON A.key = B.key;
```

RESULT

A.key	A Data	B.key	B Data
1	A1	1	B1
2	A2	2	B2
3	A3	NULL	NULL

RIGHT OUTER JOIN



Returns all rows from the right table (B) and the matched rows from the left table (A). If no match, columns from A will be NULL.

```
SELECT *
FROM A
RIGHT JOIN B
ON A.key = B.key;
```

RESULT

A.key	A Data	B.key	B Data
1	A1	1	B1
2	A2	2	B2
NULL	NULL	4	B4

A.key and B.key represent the related column (join key) used to match rows between the tables.

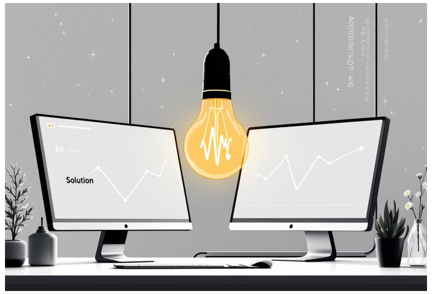
Key Considerations Before Building a Report

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.

Reference: Operationalize Reporting

Decide on the operating model for ongoing report delivery

- Maintain Data Providers when introducing new attributes / features
- Describe the operational process to introduce new reports. Does it follow the same process as other enhancement delivery? Are there new stakeholders? Apply your usual OCM practices
- Consider standards / create a template report for branding and general appearance
- Consider a periodic report schedule review – especially if there are hard-coded emails