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From Data to Insights – Mastering Native Functionality: Widgets, Views and Canvas

Your Guides:
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Gold Sponsor
aws

Agenda

- Clarity’s Visualization and Reporting Ecosystem
- MUX
  - Views
  - Widgets
  - Canvas
- Rego Assets
- Choosing the right visualization tool

Let's Connect!

- Who is using MUX?
- Do you have more than 1 view?
- Do you use any of the features for views, like grouping, conditional formatting or any other advanced features?
- Have you used widgets?

Clarity's Visualization and Reporting Ecosystem

Reminder: Jaspersoft Advanced Reporting Sunset

- Broadcom SaaS customers, Jaspersoft was removed as part of the **production 16.4.3** upgrade scheduled for **September 11, 2026**.
- Clarity on-premises customers having Jaspersoft installed prior to September 30, 2026, can continue to contact Broadcom Support (Level 1) for as-is no bug fixes or software updates, as long as you are on a supported (non EOL) version of Clarity that also supports Jaspersoft.
- Rego SaaS also follows as the Clarity on-premises customers.
- For more information, reference:

  End of Life Announcement for CA Business Intelligence for Clarity | Clarity

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

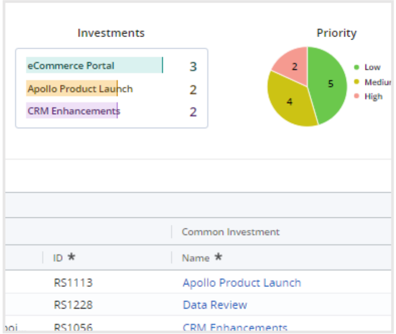
Widgets
Interactive visual components

New Reporting
Inhouse business intelligence solution

Odata
Inhouse business intelligence solution

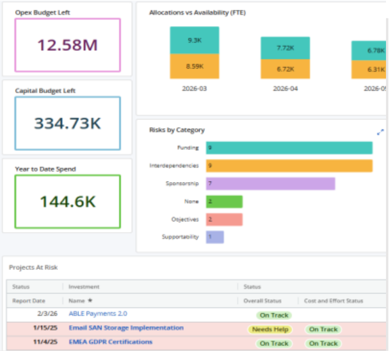
Choose Your Fighter

In UI Views and Widgets



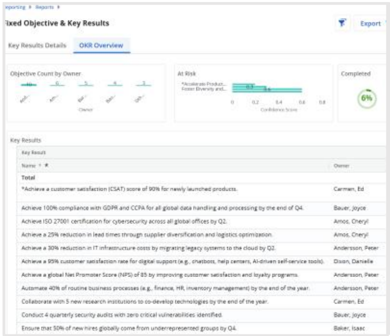
- Live Data
- Reports are operational, used day-to-day
- Can only be accessed by Clarity users
- Filter options
- End user configurable for quick changes in layout, type or conditional formatting
- No maintenance and constantly being improved by each release

Canvas



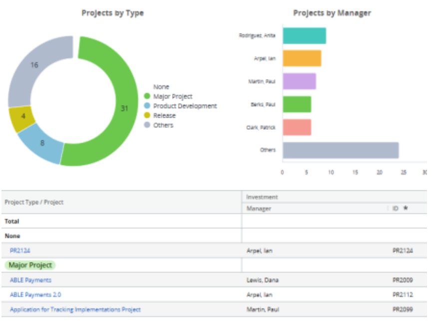
- Built on top of widgets
- Enable Objects on Blueprint for Canvas
- Can be enabled for Project/Idea/CIT/Status
- Can also be enabled for Hierarchy and Roadmap
- Can export to PDF

Portlets



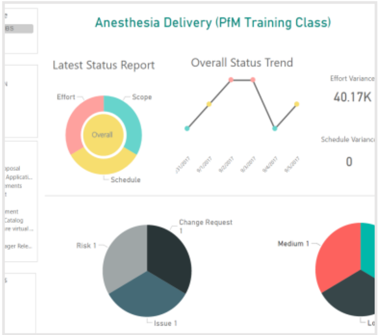
- Live Data or DWH
- Reports are operational, used day-to-day
- Can only be accessed by Clarity users
- Could be slow and impact the clarity application
- Personalization features available
- Query based portlets only available in Classic
- Export to PPT/Excel/CSV

New Reporting Workspace



- GA with 16.3.3 (Jaspersoft sunset in Sep 2026)
- DWH data
- OOTB as well as Customized Data Providers
- Can only be accessed from Clarity
- Export to PDF, PPT, CSV
- Scheduled Delivery
- Report library for archived exports

External BI Solutions

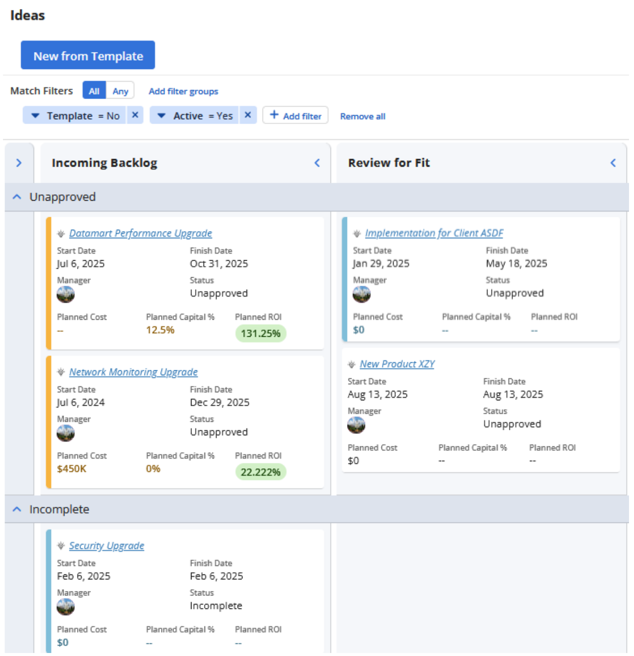


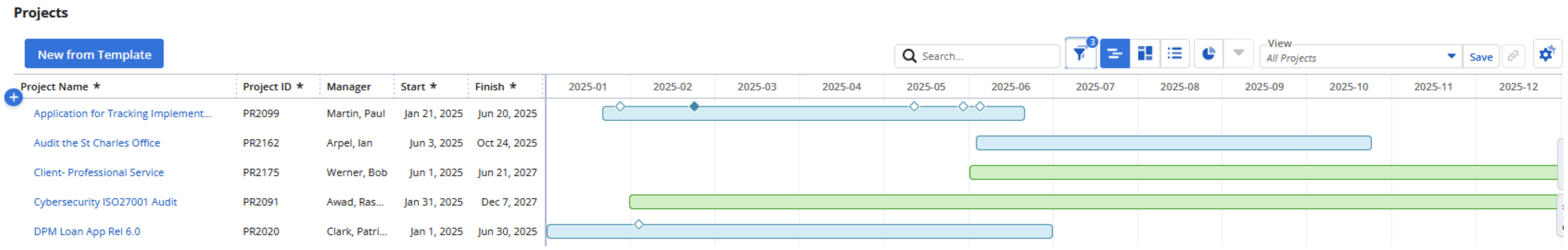
- Could connect to multiple data sources
- OData and/or Flat File Exports
- Industry-best visualization, interactivity, most flexibility
- Reports can be accessed by non-clarity users
- Scheduled delivery, mobile alerts
- Complex logic and calculations
- Might have a license requirement

Views

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
- Export Grid layout to CSV
- Real time data
- Limited to a single object / module





Project manager view of his project's schedules

Views – Choosing a Layout

Grid

- Spreadsheet-style rows and columns — best for scanning many records at once

Board

- Kanban-style cards grouped into lanes by status or category — best for workflow-driven work like Ideas or To-Dos

Timeline

- Calendar/Gantt-style layout for date-driven data — best for schedules, milestones and roadmaps

Same data, different lens

- The right layout depends on the question being asked, not the object type

Grid – Features

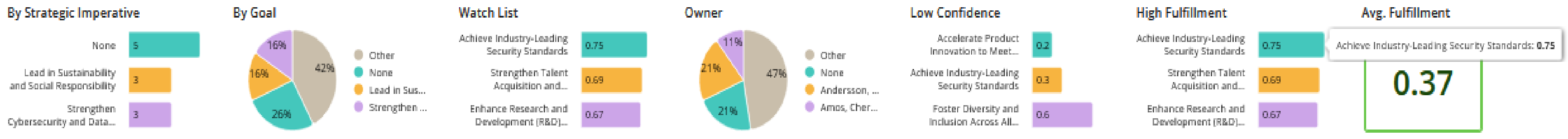
- Sorting and Grouping
- Advanced Filtering and Groups
- Support multiple views
- Conditional Formatting
- Easily display per period data

Views – OKR Overview for Strategic Leadership

OKRs

New from Template

Search... | View: Strategic Review | Save



Select all Deselect all

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

Views – Building Your Own View

Start from an existing view

- Duplicate an out-of-the-box view rather than starting from a blank grid
- Keeps proven filters and columns as your starting point

Configure columns and filters

- Add, remove and reorder fields to match your persona’s needs
- Layer filters to scope down to exactly the records that matter

Save and share

- Save as a personal view or share it with a group
- Set a view as the default landing view for an object

Let's Get Hands-On

- URL https://tinyurl.com/RegoUReport
  or full URL
  https://clarity-fresh01.rego-internal.moventus.com/pm/
- Choose a login user between Juser01 and Juser60
- Password is Niku@345!

Exercise 1: Build a View

1. Pick a persona
   - Project Manager, Resource Manager, or Portfolio Lead
2. Create a Grid view
   - Show Name, Status, % Complete and Manager
   - Add a filter scoped to your own projects or resources
3. Switch to a Board layout
   - Group by Status and compare the two layouts
4. Save your view
   - Note which layout you'd hand to your persona and why

Saved View – Sharing Options

- A saved view can be shared for everyone, selected people, or groups
- Administrator controls which options are available
- Sharing the view layout, not the data

Administration ▸

Actions

Match filters All Any Add filter groups

Action = Views - Share with Everyone; Views - Share with Groups; Views - Share with P... × + Add filter Remove all

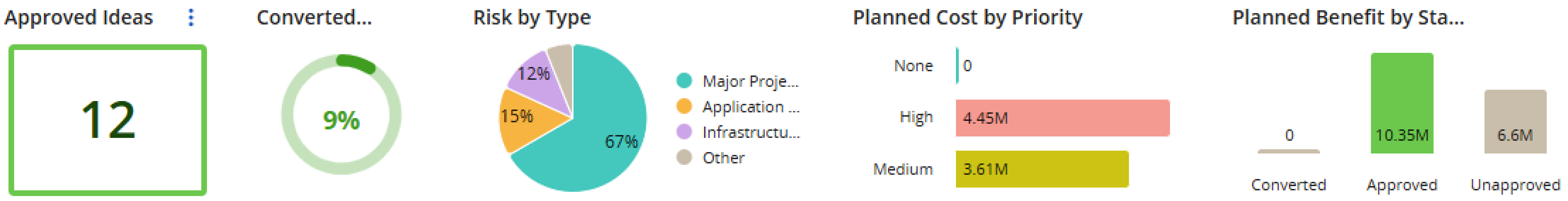
Group by

Action * ↑	Type * ↑	Enabled ↑	Secure ↑	Access	Description ↑
Views - Share with Everyone	All	✓			Ability to share your views with everyone
Views - Share with People	All	✓			Ability to share your views with people to which you have view access
Views - Share with Groups	All	✓	✓	RegoU 2026 Clarity Reporting	Ability to share your views with any groups enabled for sharing

Widgets

Widgets – What is it

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

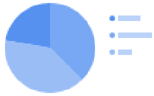


Widgets – Types

There are 5 Widget Types:

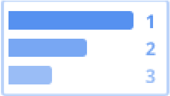
Number Tile

Single aggregated number (Count, Sum, Average) for a quick-glance metric



Pie Chart

Proportional comparison grouped by a field like status or investment type



Bar Chart

Side-by-side comparison grouped by a field like status or investment type

Progress Ring

Visual progress against a target, e.g., percentage of approved ideas

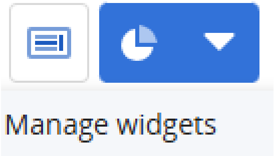
Target

Goals (e.g., strategic score) or constraints (e.g., budget ceiling) on number or money attributes

Available for Roadmap and Staffing for scenario planning

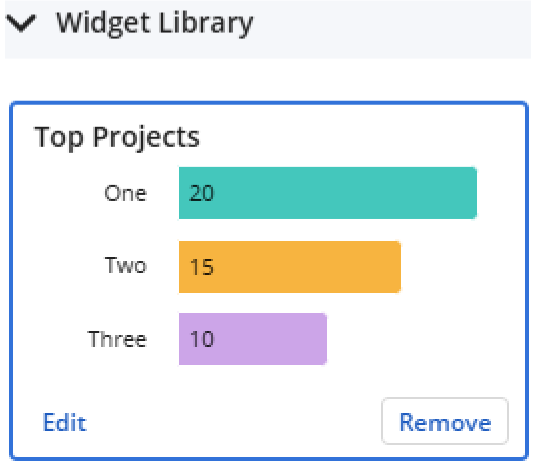
Widgets – How to Set Up

- Manage widgets



- Create a new Widget

- Or Add/Edit an existing widget from the Library



- Widget Library – Toggle to include. Reuse by other users

Exercise 2: Build a Widget

1. Build your own widgets
   - Navigate to the Project list
   - A Number Tile to show Sum of ETC
   - A Pie Chart to show Projects by Status
   - A Bar Chart to show ETC by Work Status
2. Save for reuse
   - Add both to the Widget Library so they can be reused
3. Test interactivity
   - Apply a filter and confirm each widget updates in real time

Widgets – Tips

- Turn on Filter Widget to:
  - Filter widgets from filter panel selection
  - Click a widget element to filter other widgets, e.g. a bar in a bar chart
- Double Click converts values from numbers to percentages
- Click the Expand icon to see bigger charts and possibly more dimensions on bar charts
- To delete a widget library item, first remove it from the widget library
- Works with custom sub-objects, e.g., decision, lessons learnt

Widgets – Considerations

- Watch for negative values
  - You may see incorrect data if you use attributes that may include negative values
  - Double check any cost or variance widget against the underlying data
- Can add a max of 10 widgets to the widgets ribbon
- When not-expanded, charts only shows top 3 or 4 items
- The attachment, URL, Large String and RTF attribute are not available for widgets
- Deleting a custom attribute used in a widget will also delete that widget
- Doesn’t support multi-currency
- Can’t be exported

Widgets – Access Rights

- To create a widget, users just need view access to the page or module
- To manage/delete from the Widget Library, users would need access rights below:

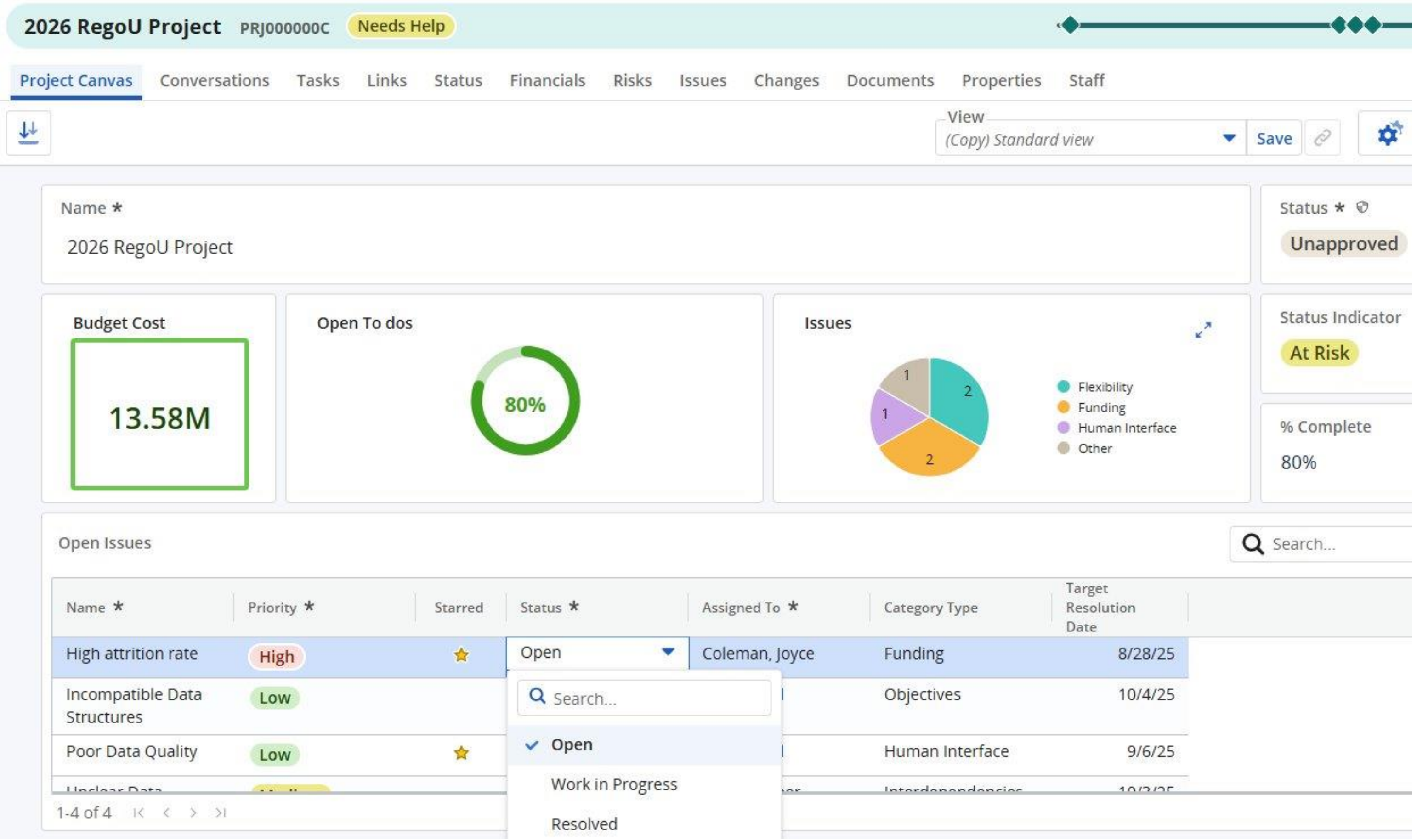
Access Right ▲	Description
Widgets - Delete from Widget Library	Allows user to delete widgets from widget library.
Widgets - Manage Widget Library	Allows user to add, remove widgets from widget library.

- Widgets - Manage Widget Library access right allow users to:
  - Add your widgets to the Widget library so that other users can leverage them
  - Edit existing widgets in Widget Library to update the widget definition and filter criterion
  - Move a widget from the Widget library to the My Widgets section

Canvas

Canvas – What is it

- Dashboard and visualization tool
  - Allows visualization of data by providing a flexible, widget-based layout

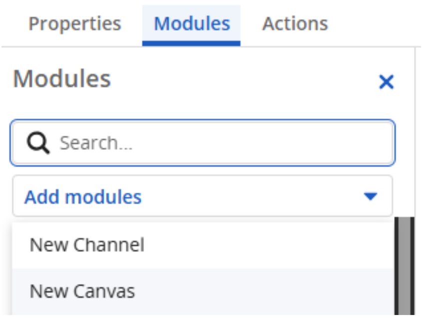


Canvas

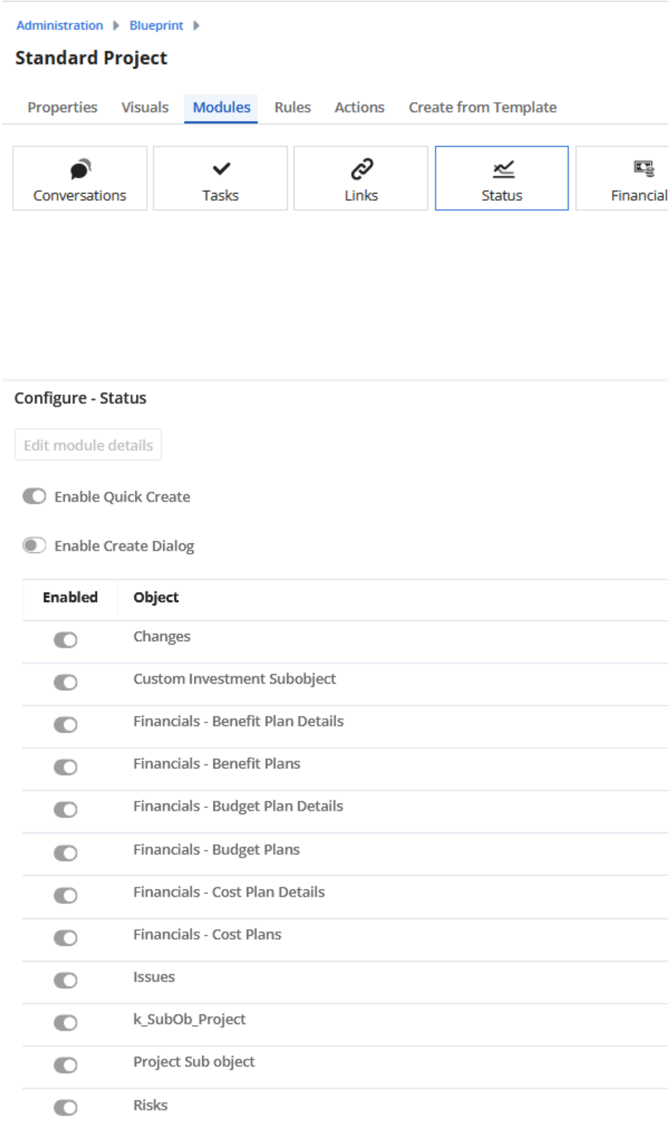
- Drag-and-drop layout
  - You can drag and drop widgets, fields, and tables to customize the layout of a Canvas page
- Real time Data
- Editable Widgets and Fields
  - Many widgets and fields on the Canvas are editable directly in place, depending on your access rights
- Saved views and personalization
  - Users can create and save personalized views of a Canvas page
- PDF Exportable
- Data security
  - View/edit data based on your access
  - Field level security respected
  - Blueprint rules are supported

Canvas - How to Enable

- Create or edit an existing blueprint, e.g., a project blueprint
- Navigate to Modules > Add modules > New Canvas



- Name the Canvas, e.g., Project Canvas
- Enable objects that will be available for widgets
- Publish the blueprint, and assign to a project
- The Project should now have a new tab called Project Canvas

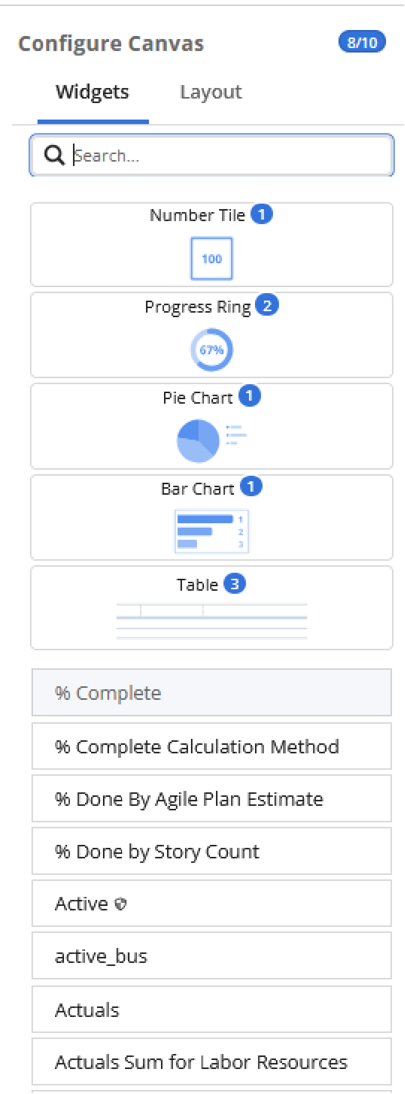


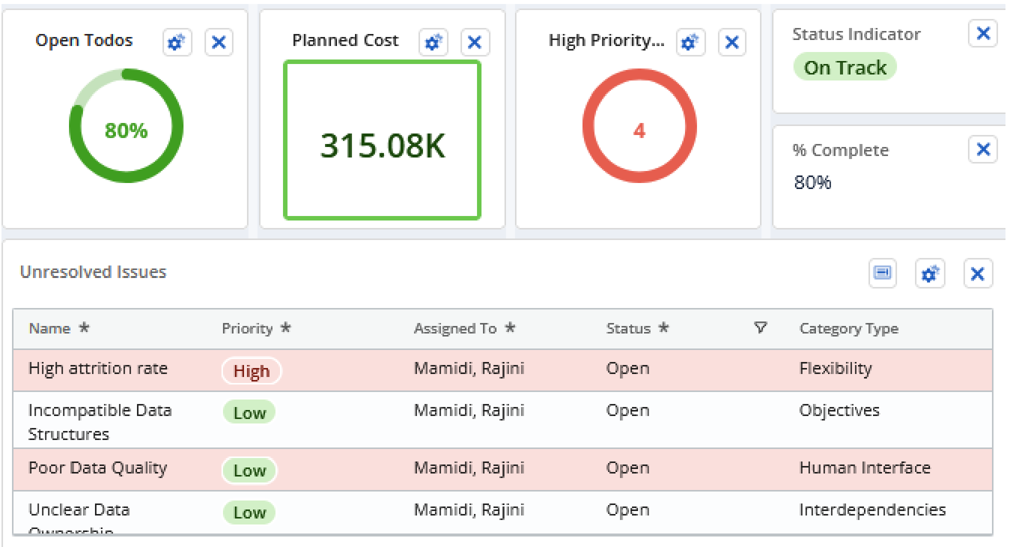
Canvas – How to Configure

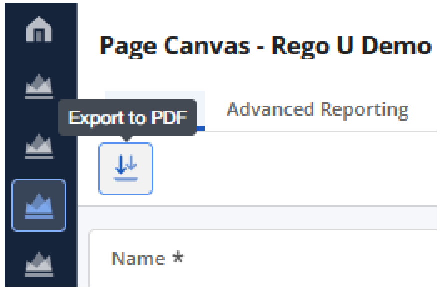
1. Confirm setup
   - Check the investment’s blueprint has the Canvas module enabled
2. Choose a layout
   - Open Configure Canvas and select a layout: 4/6/8 columns
3. Drag and drop
   - Add fields, widgets and tables; resize one-column widgets to stretch across two columns
4. Save your view
   - Save the layout as a personalized view

Canvas

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



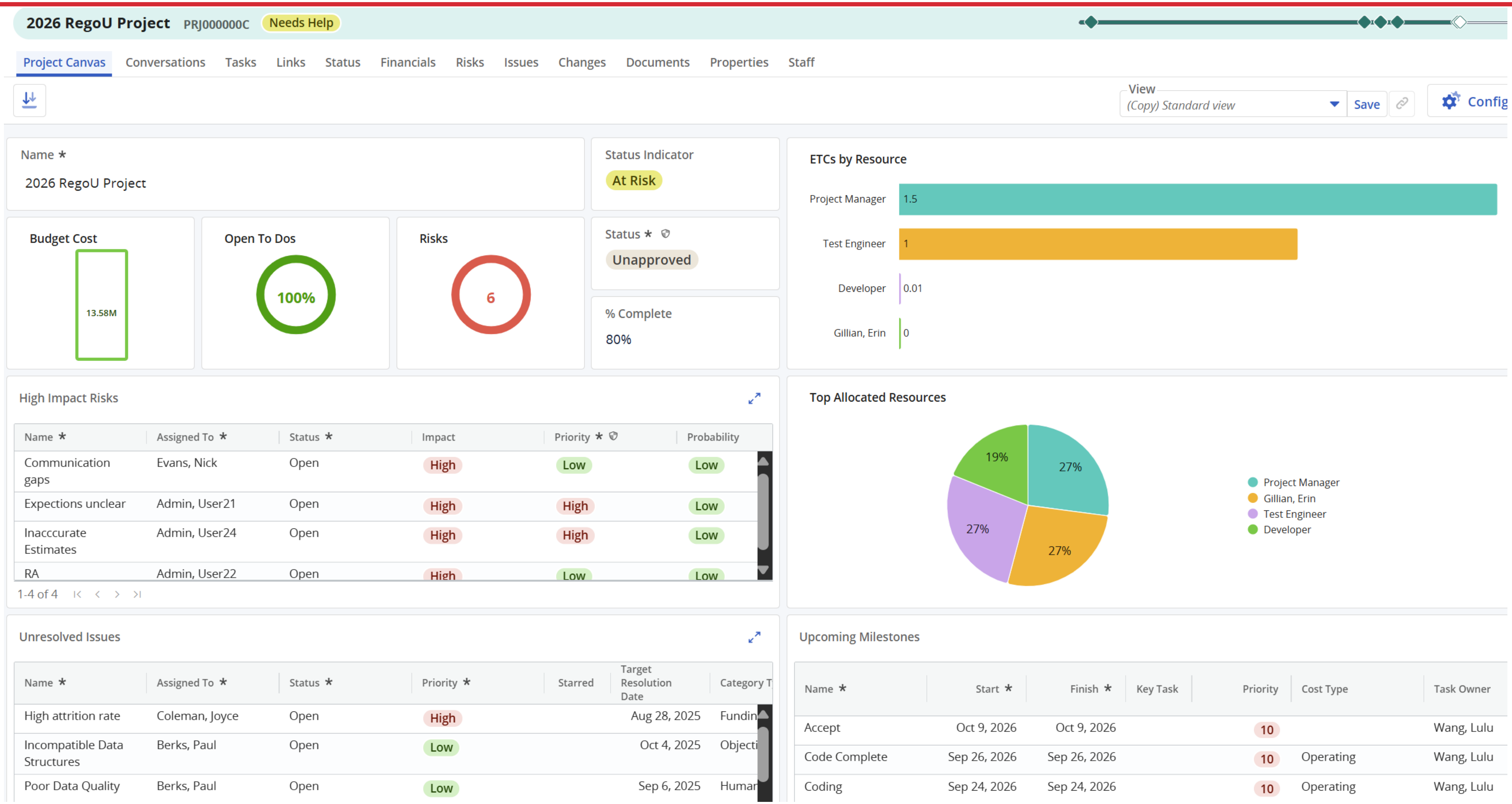




Canvas - Types

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

Project Dashboard



High Impact Risks

Name *	Assigned To *	Status *	Impact	Priority *	Probability
Communication gaps	Evans, Nick	Open	High	Low	Low
Expections unclear	Admin, User21	Open	High	High	Low
Inacccurate Estimates	Admin, User24	Open	High	High	Low
RA	Admin, User22	Open	High	Low	Low

1-4 of 4

Unresolved Issues

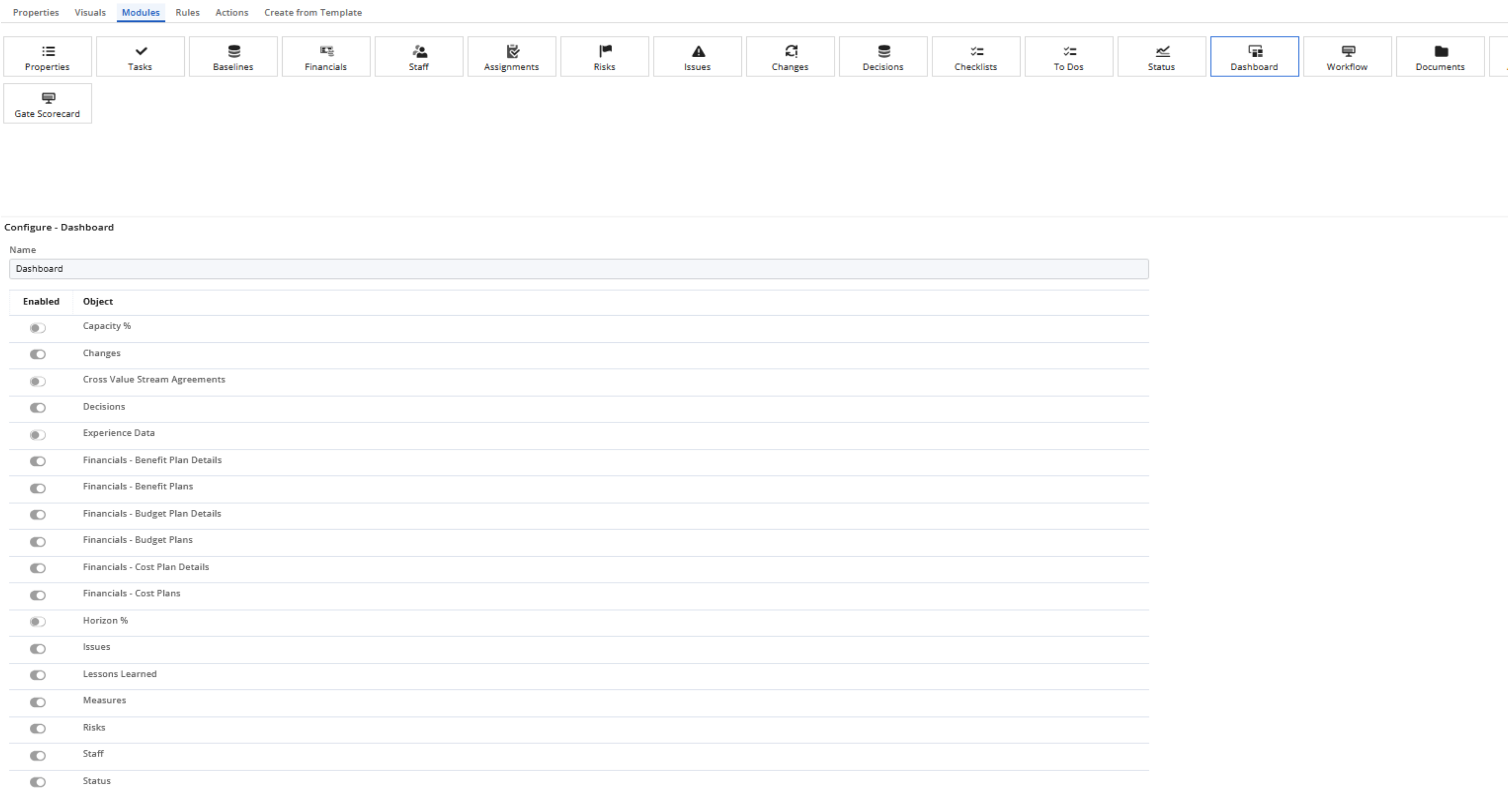
Name *	Assigned To *	Status *	Priority *	Starred	Target Resolution Date	Category T
High attrition rate	Coleman, Joyce	Open	High		Aug 28, 2025	Fundin
Incompatible Data Structures	Berks, Paul	Open	Low		Oct 4, 2025	Objecti
Poor Data Quality	Berks, Paul	Open	Low		Sep 6, 2025	Humar

Upcoming Milestones

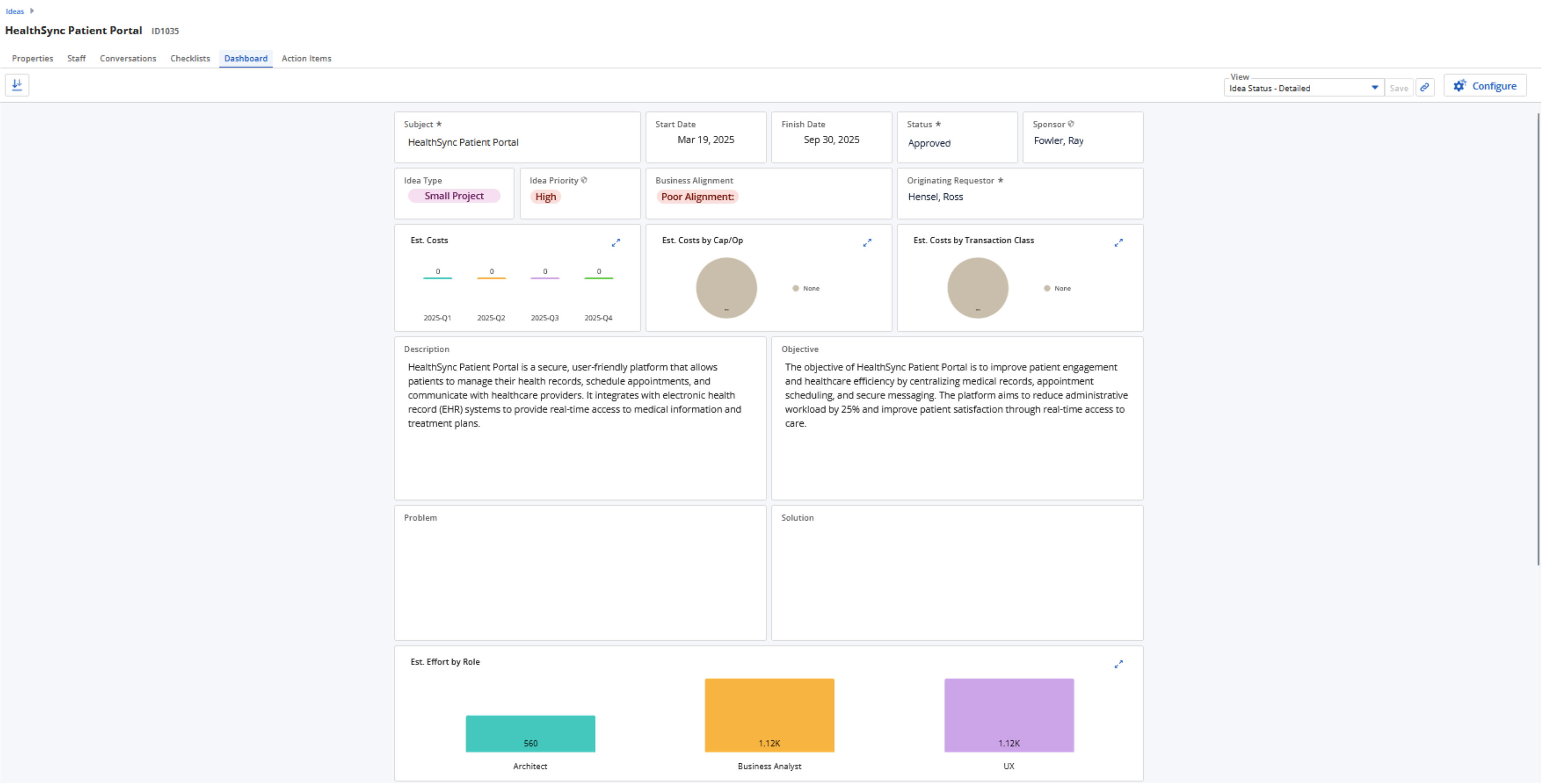
Name *	Start *	Finish *	Key Task	Priority	Cost Type	Task Owner
Accept	Oct 9, 2026	Oct 9, 2026		10		Wang, Lulu
Code Complete	Sep 26, 2026	Sep 26, 2026		10	Operating	Wang, Lulu
Coding	Sep 24, 2026	Sep 24, 2026		10	Operating	Wang, Lulu

Project Canvas

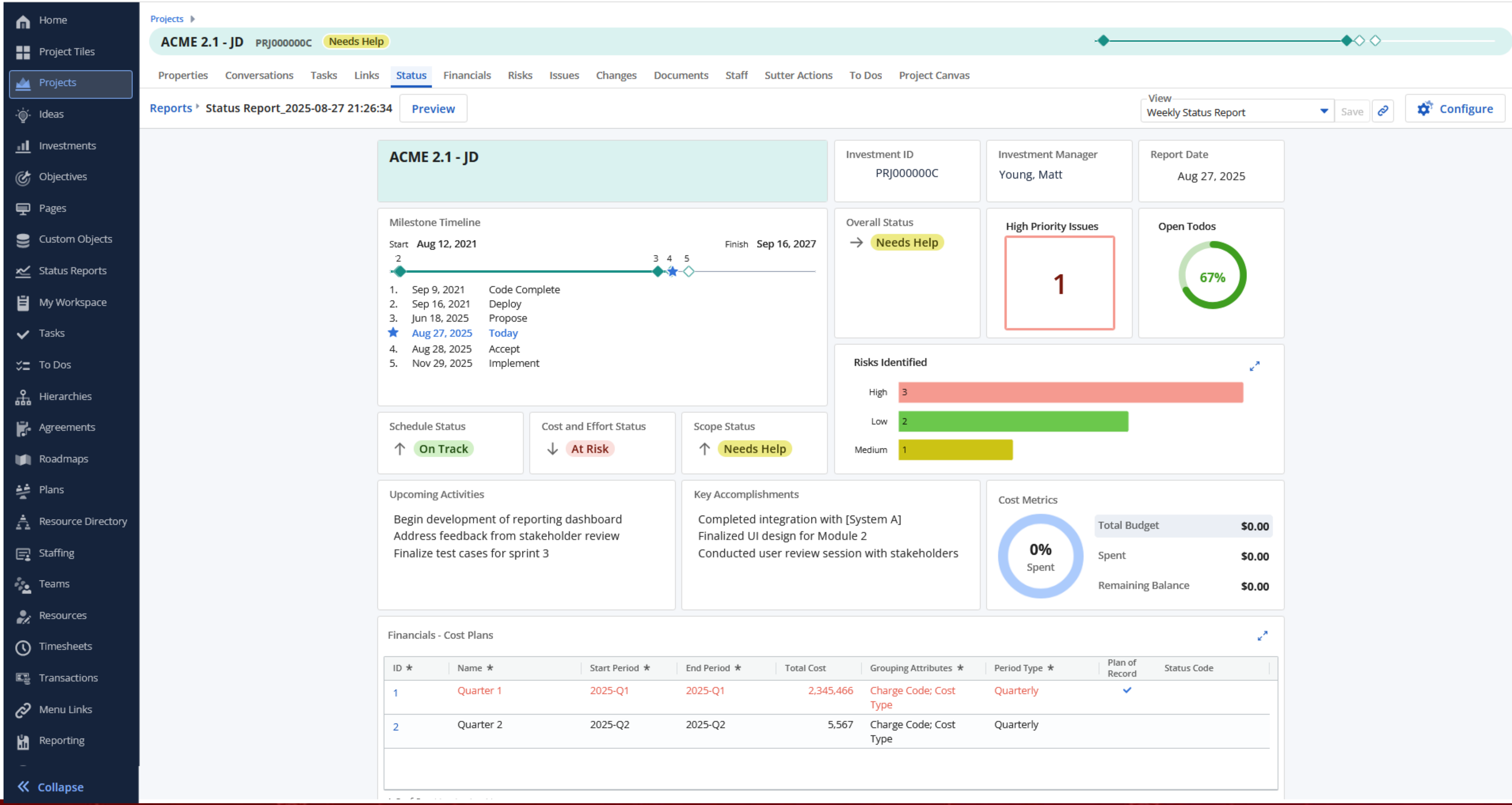
Enable Objects on Blueprint for Canvas



Idea Dashboard

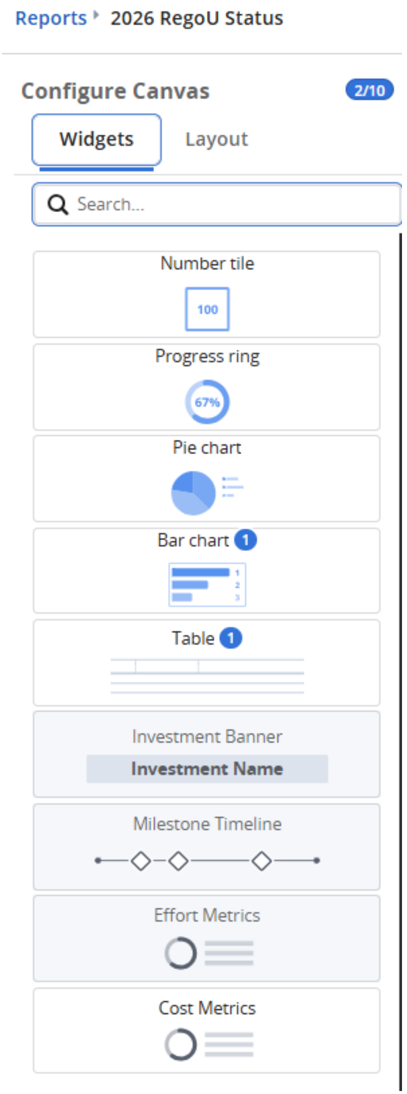


Status Canvas

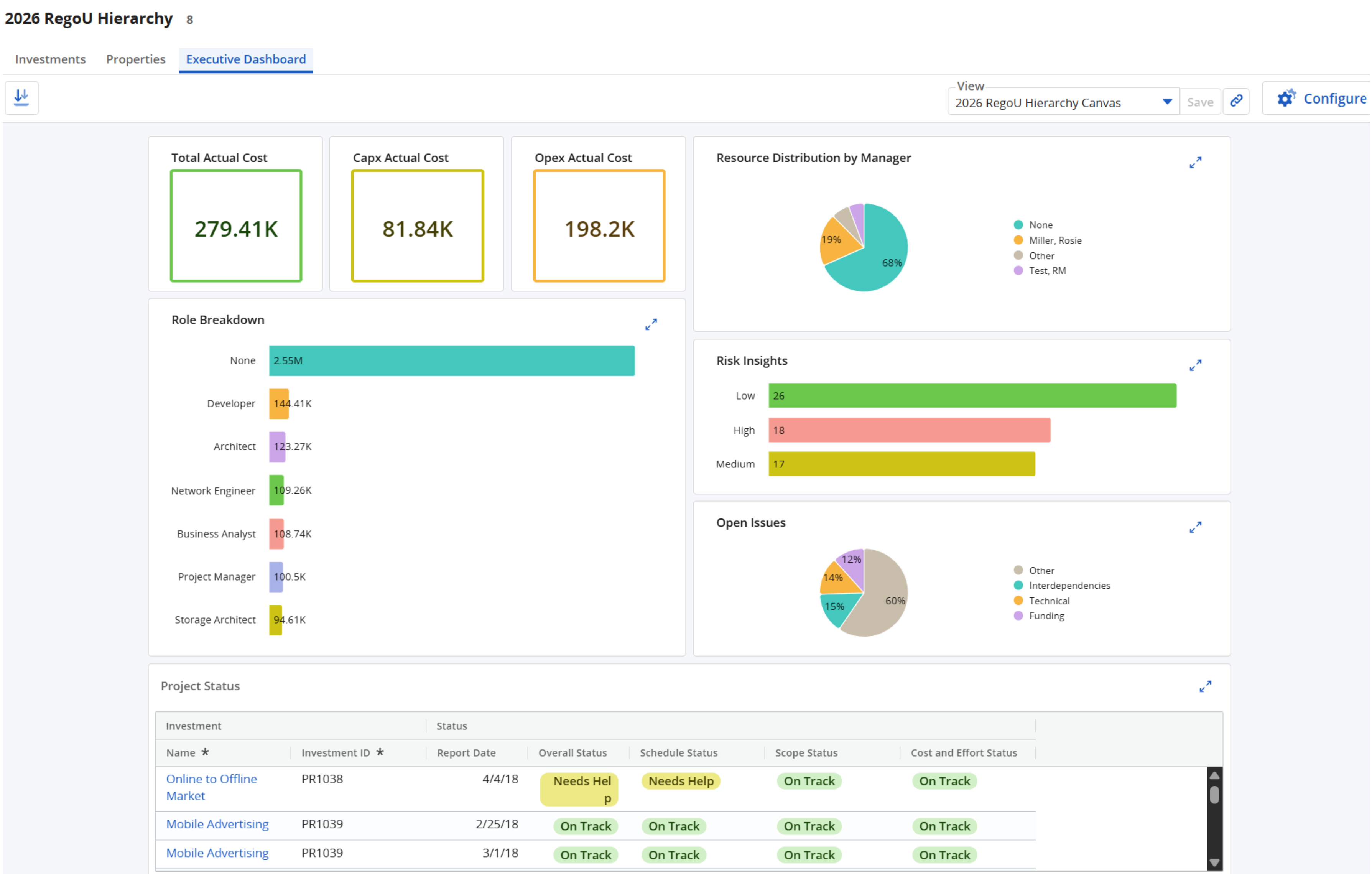


Status Canvas

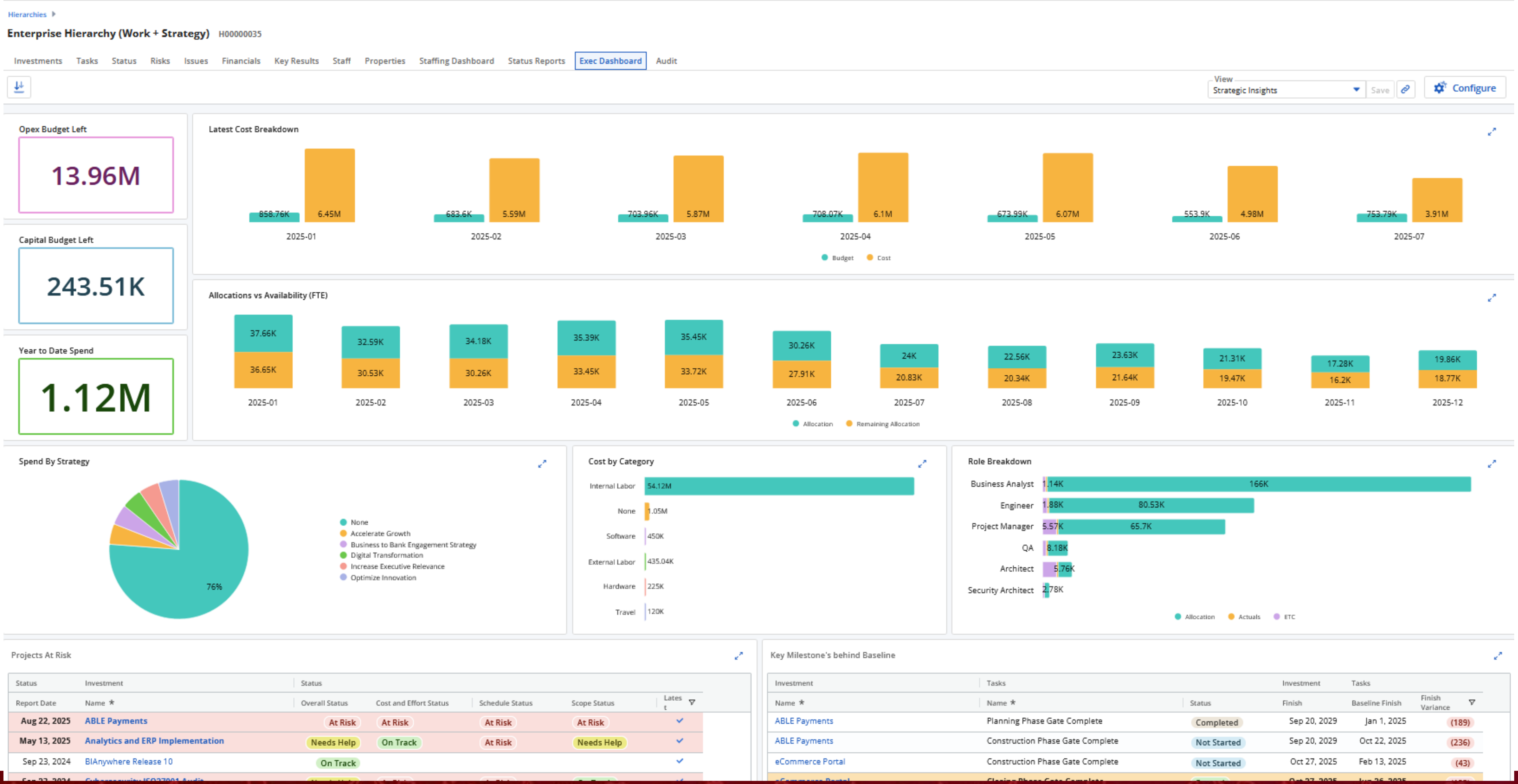
- OOTB module on the Standard Project blueprint
- By default the latest Draft of the status report appears
- Additional widget types available:
  - Investment Banner
  - Milestone Timeline
  - Effort Metrics
  - Cost Metrics



Hierarchy Dashboard



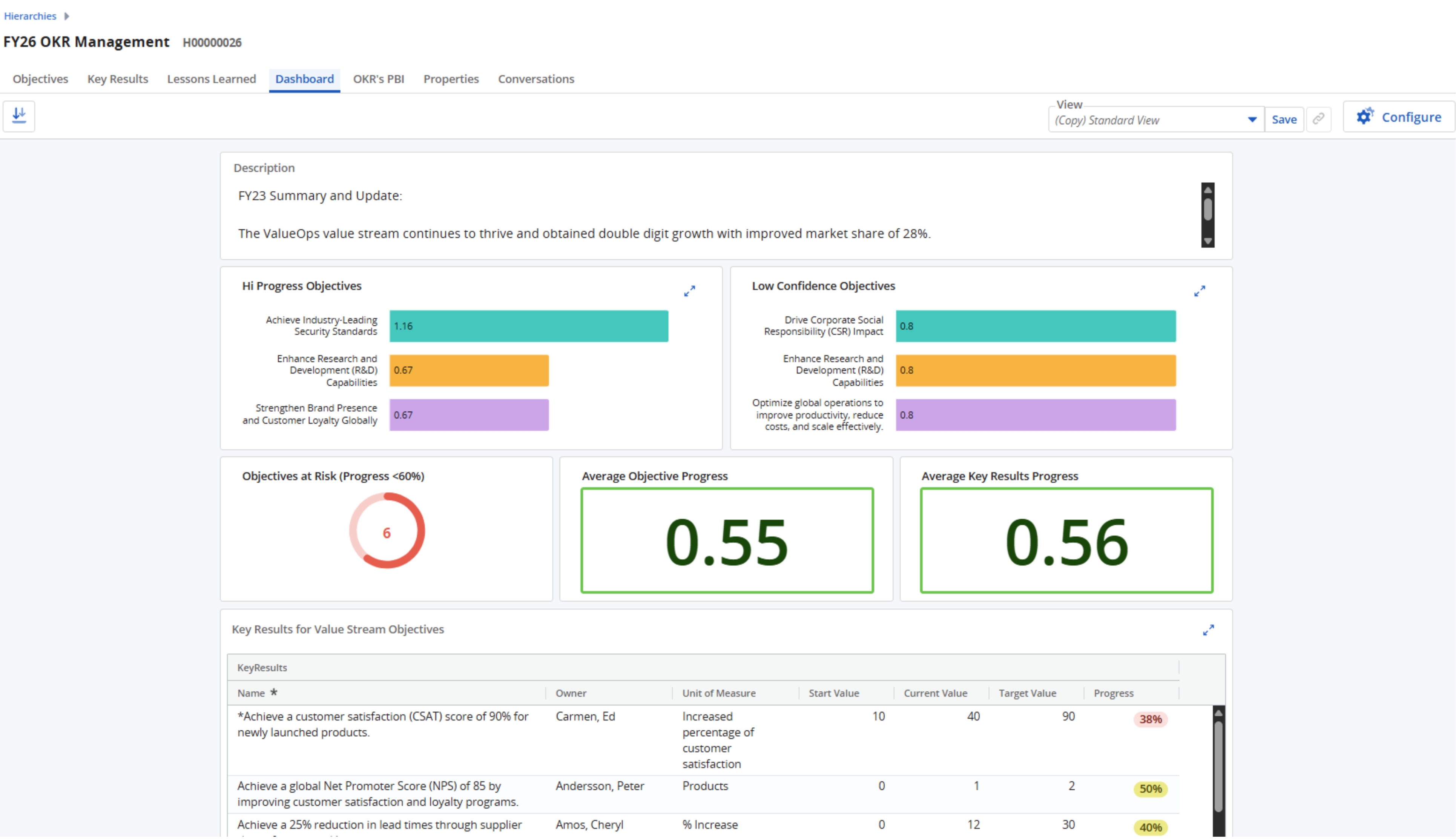
Hierarchy Dashboard



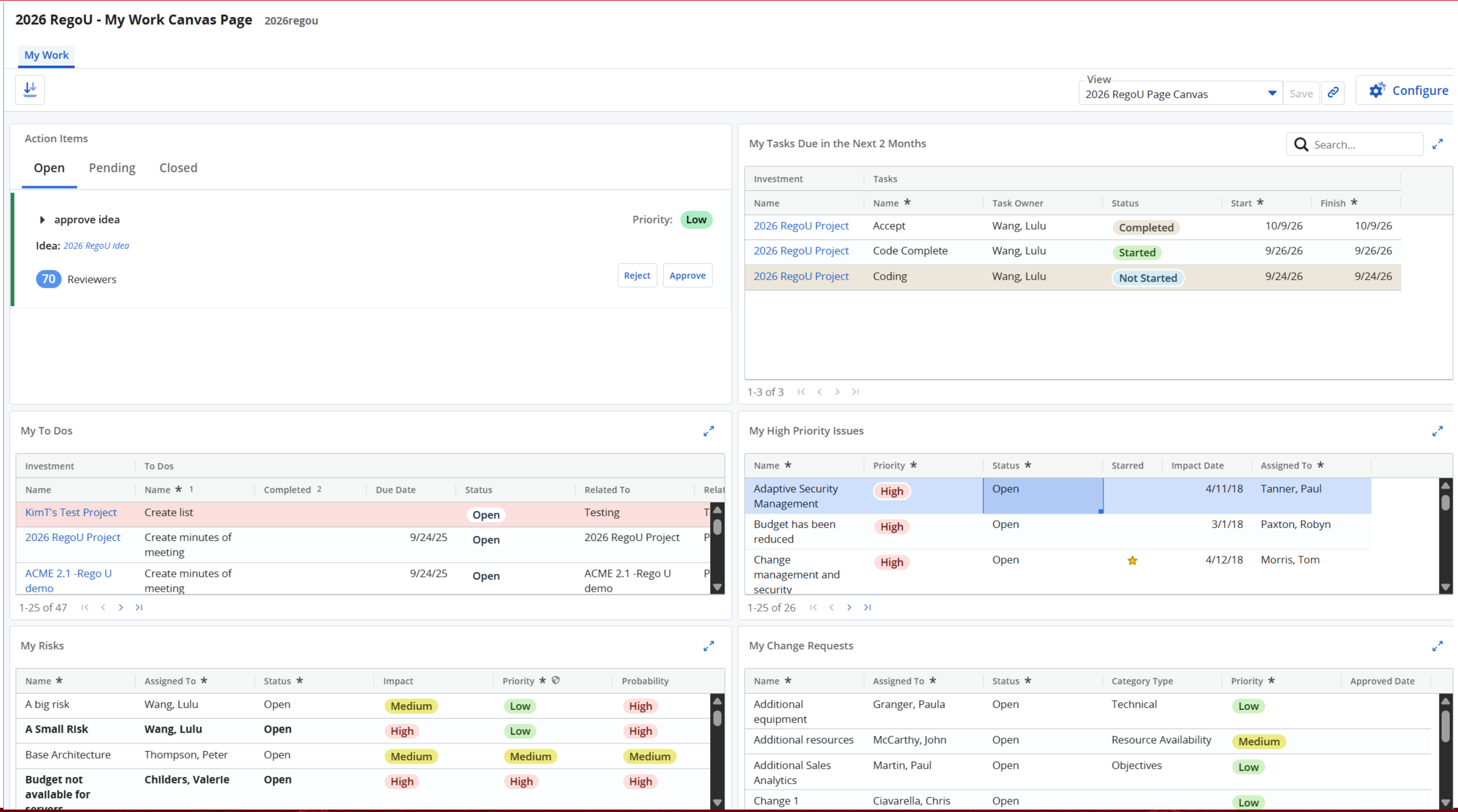
Hierarchy Canvas – Objectives

- Available from Clarity 16.2.2
  - Objective Hierarchy Blueprints can enable Investments as an additional target object
- Once enabled
  - Investments can feed Number Tile, Progress Ring, Pie Chart, Bar Chart and Table widgets
- Why it matters
  - Gives leadership a rolled-up view of the actual work underway in support of a set of Objectives

Objective Hierarchy

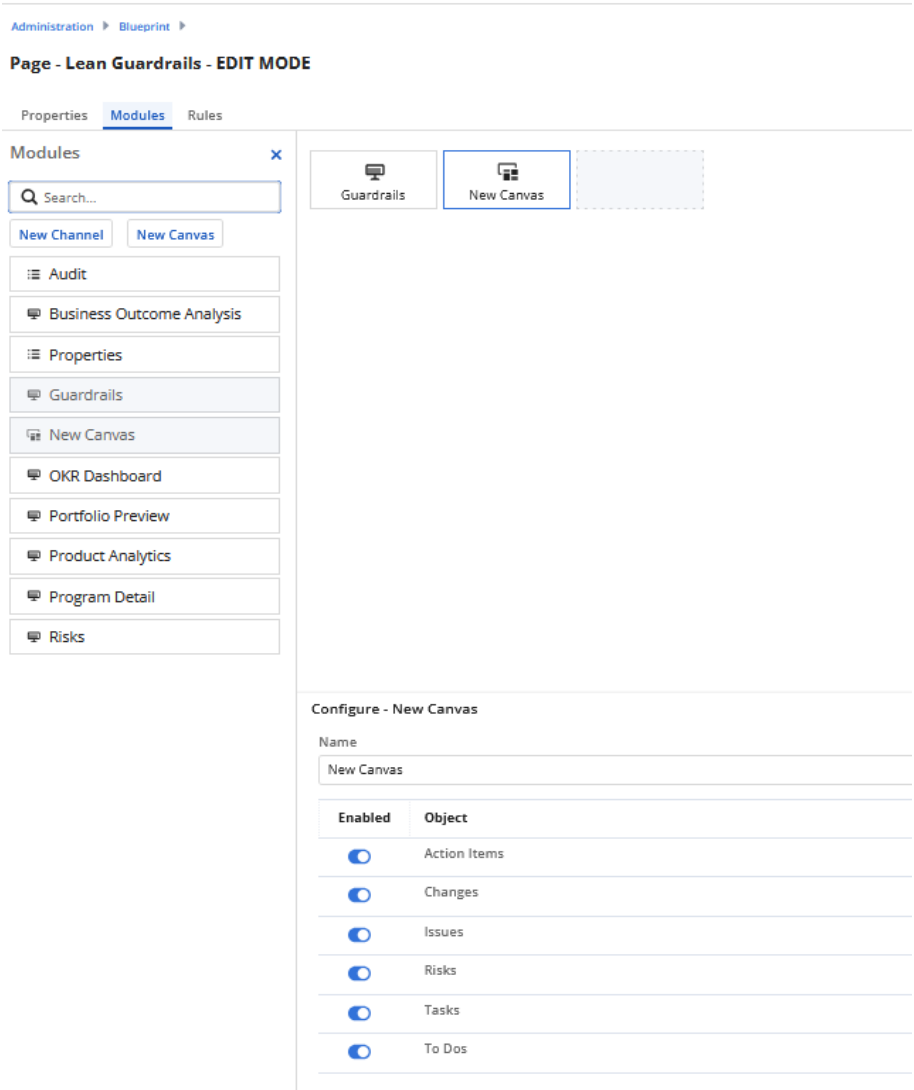


Page Canvas


2026 RegoU - My Work Canvas Page 2026regou
My Work
View
2026 RegoU Page Canvas
Save
Configure
Action Items
Open
Pending
Closed
approve idea
Priority: Low
Idea: 2026 RegoU Idea
70 Reviewers
Reject
Approve
My Tasks Due in the Next 2 Months
Search...
Investment
Tasks
Name
Name
Task Owner
Status
Start
Finish
2026 RegoU Project | Accept | Wang, Lulu | Completed | 10/9/26 | 10/9/26
2026 RegoU Project | Code Complete | Wang, Lulu | Started | 9/26/26 | 9/26/26
2026 RegoU Project | Coding | Wang, Lulu | Not Started | 9/24/26 | 9/24/26
1-3 of 3
My To Dos
Investment
To Dos
Name | Name 1 | Completed 2 | Due Date | Status | Related To | Relat
KimT's Test Project | Create list | Open | Testing
2026 RegoU Project | Create minutes of meeting | 9/24/25 | Open | 2026 RegoU Project
ACME 2.1 -Rego U demo | Create minutes of meeting | 9/24/25 | Open | ACME 2.1 -Rego U demo
1-25 of 47
My High Priority Issues
Name | Priority | Status | Starred | Impact Date | Assigned To
Adaptive Security Management | High | Open | 4/11/18 | Tanner, Paul
Budget has been reduced | High | Open | 3/1/18 | Paxton, Robyn
Change management and security | High | Open | 4/12/18 | Morris, Tom
1-25 of 26
My Risks
Name | Assigned To | Status | Impact | Priority | Probability
A big risk | Wang, Lulu | Open | Medium | Low | High
A Small Risk | Wang, Lulu | Open | High | Low | High
Base Architecture | Thompson, Peter | Open | Medium | Medium | Medium
Budget not available for servers | Childers, Valerie | Open | High | High | High
My Change Requests
Name | Assigned To | Status | Category Type | Priority | Approved Date
Additional equipment | Granger, Paula | Open | Technical | Low
Additional resources | McCarthy, John | Open | Resource Availability | Medium
Additional Sales Analytics | Martin, Paul | Open | Objectives | Low
Change 1 | Ciavarella, Chris | Open | Low

Page Canvas

- Intended for personal productivity
- Can be added as navigation menu
- Available objects
  - Action Items
  - Changes
  - Issues
  - Risks
  - Tasks
  - To Dos



Canvas - Tips

- Widget library is disabled in Canvas
- Only the widget owner/creator can modify the widget configuration
- If a canvas attribute is later secured using FLS, the widget will throw a 400 error
- When Periods is selected, only TSV attributes are available

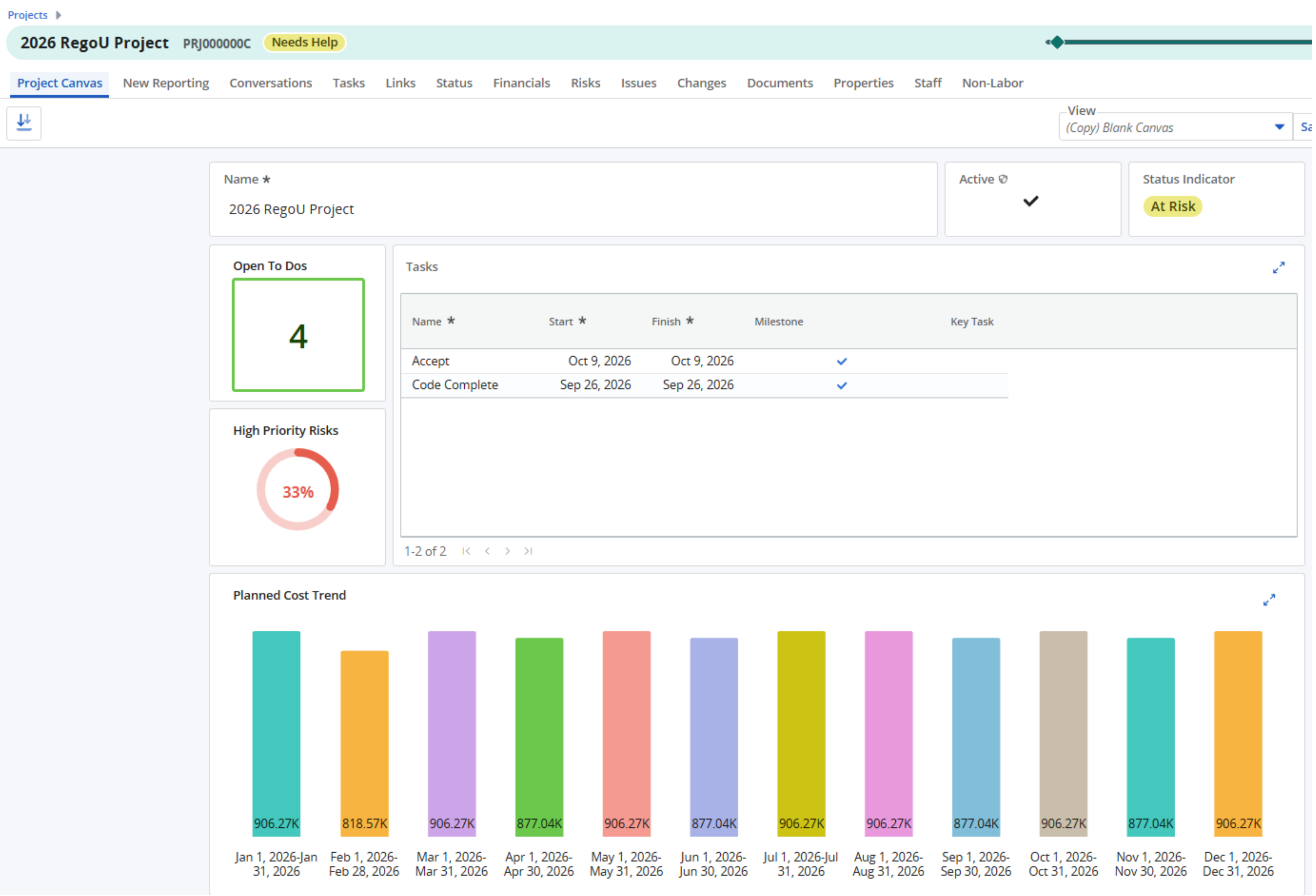
Canvas - Considerations

- Don't support sub-sub-object as a Target object
- Stacked/Clustered bar charts allows up to 3 attributes
- The Stacked/Clustered option only show when 2 or 3 attributes are selected
- Fields with negative values can't be used in cluster or stacked bar charts
- PDF Exports doesn't support pagination

Exercise 3: Build a Project Canvas

1. Navigate to the "2026 RegoU Project"
2. Select the "Blank Canvas" view, click configure
3. Add following widgets
    - Project name
    - Active
    - Status indicator
    - Number of open to-dos
    - Upcoming milestones grid (filter)
    - Planned cost monthly trend
4. Save as "your initial_Project Canvas" e.g. LW_Project Canvas

Exercise 3: Build a Project Canvas



Rego Assets

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Rego Assets

Rego Power BI Reports

- Suite of **free, pre-built** Power BI dashboards
- Customizable to meet specific organizational needs

Rego Power BI SaaS

- Secure hosting service to integrate PowerBI seamlessly with Clarity
- Fully managed services with end-to-end implementation

Rego Odata Extension (AWS Only)

- Define custom odata feeds
- Provides access to clarity data (transactional db)

Rego Data Extractor

- Extract large datasets
- Clarity or DWH data

What to choose?

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	My team utilization over 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	Views, Canvas, Report Designers (Clarity Reporting)	Empowers users to build their own reports, explore data independently, and adjust filters or visuals without IT support	Project Health Dashboard, KPI Storyboards
I want a pre-built, formatted report I can reuse.	Predefined, consistent layout reports	Clarity Reporting, External Tools	Reliable format, often required for compliance	Project Storyboard
I need to export detailed data	Data extracts	Data Extractor, Clarity Reporting (Fixed/CSV/Table Layout)	Data extractor is best for high-volume data	Data import to enterprise data lakes
I want to see the details of Clarity licensing status	Opportunities to save on unused licenses	Rego Odata Extension and External tools (odata)	Licensing data is visible using Rego Odata extension as it brings data from transactional database.	Housekeeping

Questions?

Survey

Please take a few moments to fill out the class survey.

Your feedback is extremely important for future events.

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

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Build recognized Clarity expertise.

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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)

Reporting & Analytics

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

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- 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 = **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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