



New Clarity Reporting

Your Guides:
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Agenda

- Clarity Reporting Ecosystem
- Reporting workspace Overview
- Create a report – Data Provider / Report Designer
- Migrate - Data Provider / Report
- Embed and Schedule Reports / Bursting
- Reports and Vaia
- Key Features, Best Practices & Recommendations
- Q&A

Introductions

3
3

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



Clarity 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



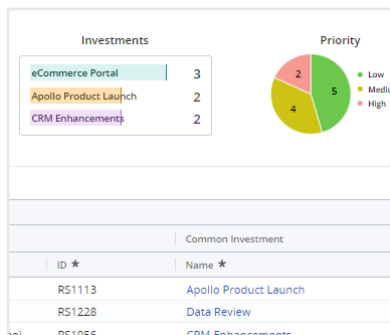
New Reporting

Inhouse business intelligence solution

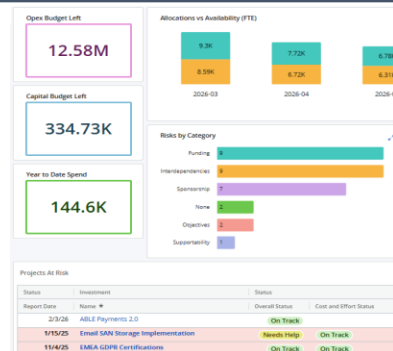


Odata

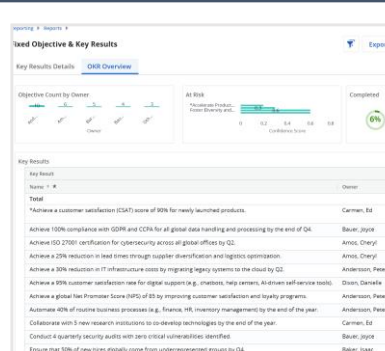
Inhouse business intelligence solution



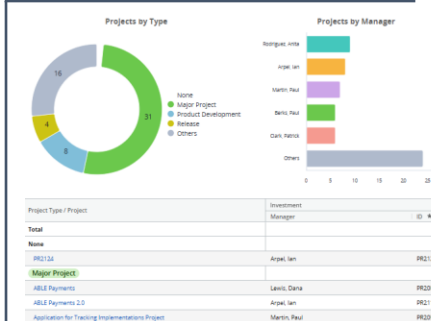
- Live Data
- Reports are operational, used day-to-day
- Can only be accessed by Clarity users
- Filter options
- End user configurable for quick changes in layout, type or conditional formatting
- No maintenance and constantly being improved by each release



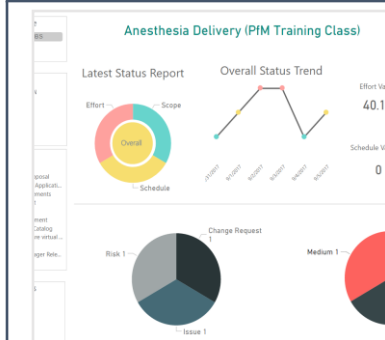
- Built on top of widgets
- Enable Objects on Blueprint for Canvas
- Can be enabled for Project/Idea/CIT/Status
- Can also be enabled for Hierarchy and Roadmap
- Can export to PDF



- 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



- 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



- Could connect to multiple data sources
- OData and DB connectors
- 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

What is the Reporting Workspace?

- Clarity native reporting solution in MUX
- Supports a more modern, configurable reporting experience with no-code/low-code design
- GA from 16.3.3
- Built around Four main pieces:
 - **Data Providers** – the underlying data source definitions used by Reports
 - **Report Designer** – where report layouts are built
 - **Reports** – where end users view available reports
 - **Data Warehouse Schema Explorer (Beta in 16.4.2)** - review Data Warehouse schema details
- Relies on Clarity Data Warehouse (DWH)
- CSV, Excel, PPTX and PDF exportable / schedules (Excel for Table widgets)



Prerequisites



Prerequisites – Pre 16.4.0 Toggle

- Prior to 16.4.0, a Feature Toggle controls the Reporting components, ensure that you have enabled it via **MUX Administration -> Feature Toggles**

Administration ▸

Feature Toggles



Select all Deselect all

 Group By

	Name *	Description ↑	Introduced In Release	Expires In Release	Enabled
☐	Reporting: Data Providers	When this feature is enabled, the Reporting menu and Data Provider functionality will be available. Users with the appropriate access rights will be able to create, modify and delete Data Providers. The Data Providers will be used when designing Reports.	16.3.0	16.4.0	✓
☐	Reporting: Report Designer	When this feature is enabled, the Reporting menu and Report Designer functionality will be available. Users with the appropriate access rights will be able to create, modify and delete Reports. This feature requires enabling the 'Reporting: Data Providers' feature.	16.3.0	16.4.0	✓
☐	Reporting: Reports	When this feature is enabled, the Reporting menu and Reports functionality will be available. Users with the appropriate access rights will be able to view Reports. This feature requires enabling the 'Reporting: Data Providers' and 'Reporting: Report Designer' features.	16.3.1	16.4.0	✓

Prerequisites – Jobs and System Options

- Depends on DWH jobs:
 - New attributes or configuration requires Full Load
 - Load Data Warehouse Access Rights job will allow for security options to be used
 - Instantaneous Sync can improve the experience by making data available faster
 - Enables near real-time synchronization of data between Clarity and the Data Warehouse
 - Performance driven by volume of activity / requires monitoring due to potential issues
- Under **Classic UX -> Administration -> System Options -> Data Warehouse Options -**
 - Check Include SQL Curve data to enable per-period metrics
 - After enabling or re-enabling **Include SQL Curve Data**, run a **Full Load Data Warehouse** job

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



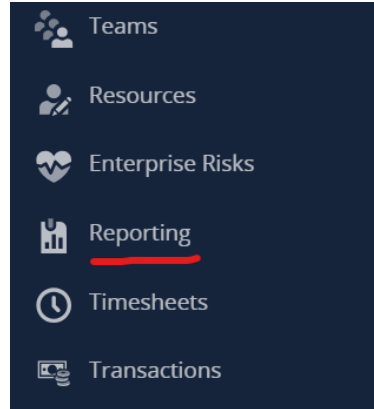
(Most updates to the data warehouse will occur in near real time when Clarity data is changed. SQL Curve tables will be updated but the Fact tables will not.)

Prerequisites – Reporting Workspace Access Rights

- Based on user's roles and responsibilities, assign the access rights in Classic Administration
 - Reporting - Navigate
 - Data Provider: Navigate / Create / Copy / Delete – All / Edit – All / View - All
 - Query: Create / Copy / Delete – All / Edit – All / View – All
 - Report Designer: Navigate / Create / Copy / Delete – All / Edit – All / View – All
 - Reports - Navigate
 - Available Reports: Navigate
 - Report Viewer: View – All
 - Scheduled Reports: Navigate
 - Report Schedule: Create / Copy / Delete – All / Edit – All / View – All
 - Reports Library: Navigate / Delete - All / View – All, Purge Reports

Prerequisites - Navigation

- Once all the prerequisites are met, a menu item will be displayed on the Navigation bar in MUX.



- Based on the access rights granted, users will be able to see the following tiles

Reporting

[Data Providers](#)

Report Designer

Reports

Data Warehouse Schema
Explorer Beta

Report Lifecycle

Creating a Report – High Level Flow

- Create or copy a **Data Provider**
 - Update objects, fields, queries, joins, and filters
- Build the report in **Report Designer** using Data Providers
 - Configure report setting, add tabs and widgets, apply filters
 - Validate and publish
- 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

Data Providers

Data Providers

- Connects to Clarity Datawarehouse data for reporting
- Combines data from multiple objects and/or queries
- Allows developers to define joins, filters, and calculations
- Similar to domains, they organize data for use in Report Designer
- Control what data users can access by configuring security
- Can be used by one or more reports

Data Providers

- Broadcom offers set of OOTB Data Providers to assist in getting started quickly.
- Review and copy existing OOTB Data providers that suits the need.
 - Can be identified by using the attribute System = Yes
 - Select or Right click on the record and Copy
- Adjust the copied Data Provider, typical changes include
 - Remove unneeded objects/attributes
 - Add new objects/attributes
 - Update Joins and filters
- Publish

Name ★ ↑	System
Assignments across Investments	✓
Changes across Investments	✓
Financial Cost Plan Details across Investments	✓
Ideas	✓
Investments	✓
Investments in Hierarchies	✓
Issues across Investments	✓
Missing Time	✓
Posted Transactions across Investments	✓
Projects	✓
Resources, Roles and Teams	✓
Risks across Investments	✓
Roadmap Items and Linked Investments	✓
Staff across Investments	✓
Staff across Investments Linked to Roadmap Items	✓
Status Reports across Investments	✓
Status Summary Artifacts	✓
Tasks across Investments	✓
Time Entries and Timesheets	✓

Data Providers – Create New

- You could create a new Data Provider

New Data Provider

- Specify a name and description

New Data Provider ×

Name *

Description

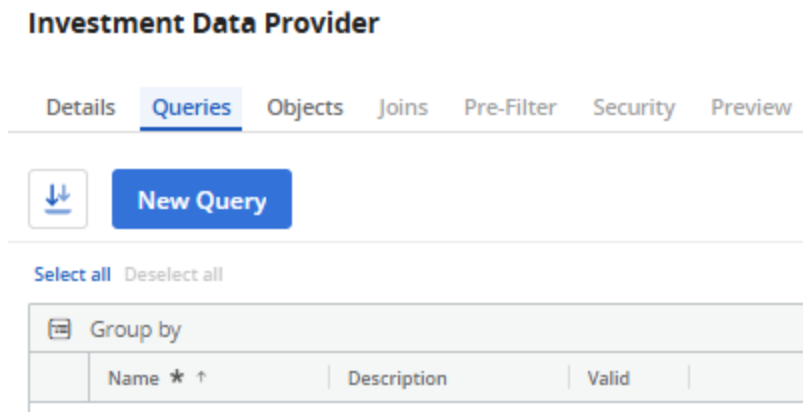
Cancel Create

Data Providers – Include Queries

- Check “Include Queries” to create custom query if needed



- The Queries tab then becomes available. Click New Query to create a new query against the DWH



Data Providers – Include Queries

- When creating a new query, reference the Tables/Views/Functions from the Data Warehouse Schema, or from the Schema Explorer

Reporting > Data Providers > Copy Posted Transactions across Invest...

Posted Transactions

Details **Query** Attributes

Data Warehouse Schema

Search...

- Tables
- Views
- Functions

```
SELECT t.transaction_key AS Transaction_Key,
t.investment_key AS Investment_Key,
t.task_key AS Task_Key,
t.resource_key AS Resource_Key,
t.transaction_date AS Transaction_Date,
t.transaction_class AS Transaction_Class,
t.input_type_code AS Input_Type_Code,
t.location AS Location,
t.department AS Department,
t.charge_code AS Charge_Code,
t.wip_class AS WIP_Class,
t.vendor_name AS Vendor,
t.notes AS Note,
t.incurred_by AS Incurred_By,
t.po_number AS PO_Number,
t.voucher_number AS Voucher_Entry_Number,
t.investment_location AS Investment_Location,
t.investment_department AS Investment_Department,
t.investment_class AS Investment_Class,
t.entity AS Entity,
t.resource_location AS Resource_Location,
t.resource_department AS Resource_Department,
t.resource_class AS Resource_Class,
t.role_name AS Role,
t.clarity_updated_date AS Posted_Date,
In.transaction_type AS Transaction_Type,
In.cost_type AS Cost_Type,
In.user_value1 AS User_Value_1,
In.user_value2 AS User_Value_2,
In.fin_work_type AS Financial_Work_Type,
t.quantity AS Units,
f.home_actual_cost_rate AS Unit_Cost,
f.home_actual_cost AS Actual_Cost
FROM dwh_fin_transaction t
LEFT OUTER JOIN dwh_fin_transaction_In In ON t.transaction_key = In.transaction_key
AND In.language_code = 'en'
INNER JOIN dwh_fin_transaction_facts f ON t.transaction_key = f.transaction_key
WHERE 1 = 1
```

Data Providers – Attributes

- In the Attributes tab, make sure the Data Types are accurate. Update Labels, Tooltip or Associated Lookup if needed

Reporting ▶ Data Providers ▶ Copy Posted Transactions across Invest... ▶

Posted Transactions

Details Query Attributes

Group by					
Attribute	Data Type	Key	Label	Tooltip	Associated Lookup ⓘ ↑
transaction_key	number	✓	Transaction Key		
investment_key	number	✓	Investment Key		
task_key	number	✓	Task Key		
resource_key	number	✓	Resource Key		
transaction_date	date		Transaction Date		
transaction_class	string		Transaction Class		

Data Providers – Data Warehouse Schema Explorer

- New tool for browsing the Data Warehouse schema directly while writing custom queries
 - Complements the custom query workflow shown under Data Providers – Create New

[Data Warehouse Schema Explorer](#) Beta

- Preview available Tables, Views, and Functions. Confirm column data type and related tables

Data Warehouse Schema X

Search...

Tables

Views

- cmn_indx_monitoring_v
- dwh_all_lookups_meta_v
- dwh_apm_app_assess_latest_v
- dwh_cfg_meta_dim_pk_v

dwh_inv_investment

Stores the generic properties that apply to all investments.

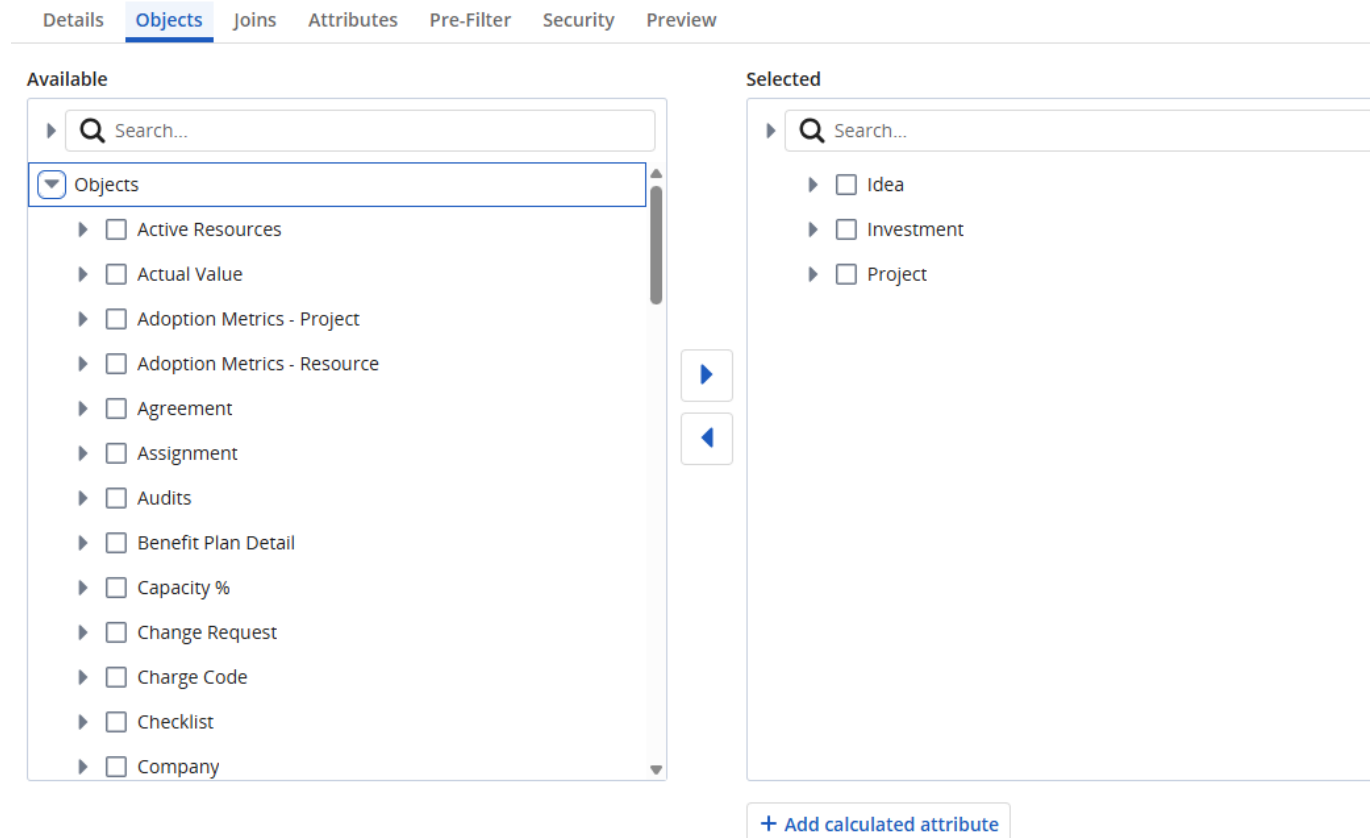
Details Related tables

Search...

Column name	Data type
investment_key	Number
active_blueprint	Text

Data Providers – Objects

- Select the necessary objects and queries
 - For custom objects and fields, they need to be enabled in the DWH, run the DWH full load, then they will be available in the Data Providers
 - Create new data providers for different domains or sub-objects to avoid duplicates (Issues, Risks etc.)
 - You could also add calculated attributes



Data Providers – Attribute Types

- Below are the available attribute types:
 - Boolean – Yes/No 
 - e.g., Is Active, Is Template
 - Number – numeric field that can be aggregated on #
 - e.g., Days Late
 - Date – typically data fields from a calendar dropdown 
 - E.g., Schedule Start, Schedule Finish
 - Text – typically text fields from user input 
 - e.g., Project Name, Project Description
 - Large String / Rich Text Field 
 - e.g., Investment Description
 - Lookup – typically select from a dropdown 
 - e.g., Work Status, Progress
 - TSV – Works with the OOTB period selector 
 - Can be sliced by day/week/month/year
 - Requires SQL Curve to be enabled
 - e.g., Actual Cost, Allocation Hours

Data Providers – Calculated Attributes

- Create Calculated Attributes (Dimension or Metric) for customized logic. Compatible with TSV attributes.

+ Add calculated attribute

Title *

Type *

Metric

☒ Show as percent

Expression *

Divide(Subtract(resource:avail_curve,team:allocation_curve),resource:avail_curve)

Bring up list of functions by typing "=" and then type in "#" bring up list of attributes or units

Cancel

✓ Valid Expression

Save

- Use the tooltip to understand provided functions and how to use them

Expression *

Divide()

Divide(number1,number2)

▲

Returns the result of dividing two numbers.

Data Providers – Joins

- Create Joins and Join filters
 - All objects and queries from the same data provider must be joined together
 - Join filters help reduce data volume and in some cases, it also helps remove duplicates

Details Objects **Joins** Pre-Filter Security Preview

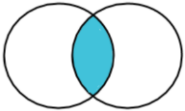
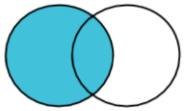
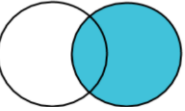
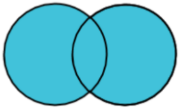
+ Add join ▼ Collapse all ⓘ The 'Key attributes' are unique internal IDs that should be used for joining

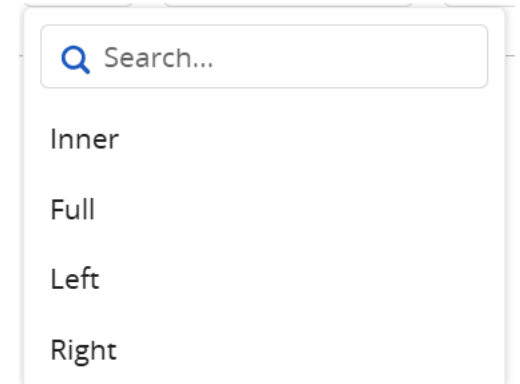
Type	Object	Attribute	Join	Object	Attribute	
▼	Left	Investment	Investment K...	Equals	Project	Investment K...
▼	Left	Investment	Investment K...	Equals	Idea	Investment K...
▼	Left	Investment	Investment K...	Equals	Status Report	Parent Refer...

Match filters **All** Any

▼ Latest (Status Report) = Yes

Data Providers – Joins

- Inner join 
 - Returns only rows that match in both tables
- Left join 
 - Returns all rows from the left table, plus matches from the right (nulls if none).
- Right join 
 - Returns all rows from the right table, plus matches from the left (nulls if none).
- Full join 
 - Returns all rows from both tables, matched where possible, nulls where not.



Data Providers – Attributes Display Mapping

- Select a numeric or lookup attribute and click the Details flyout

Details **Display Mapping**

- Under Display Mapping, assign specific color to a range, or specific lookup values

Priority ☰ ✕

Details **Display Mapping**

Color	From *	To *	Description *
☐ ▼			Default bucket
■ ▼	0	12	High Priority 🗑
■ ▼	12	24	Medium Priority 🗑
■ ▼	24	36	Low Priority 🗑

☐ ▼

Cost Reduction ▼

Cost Reduction

+ Add

🔍 Search...

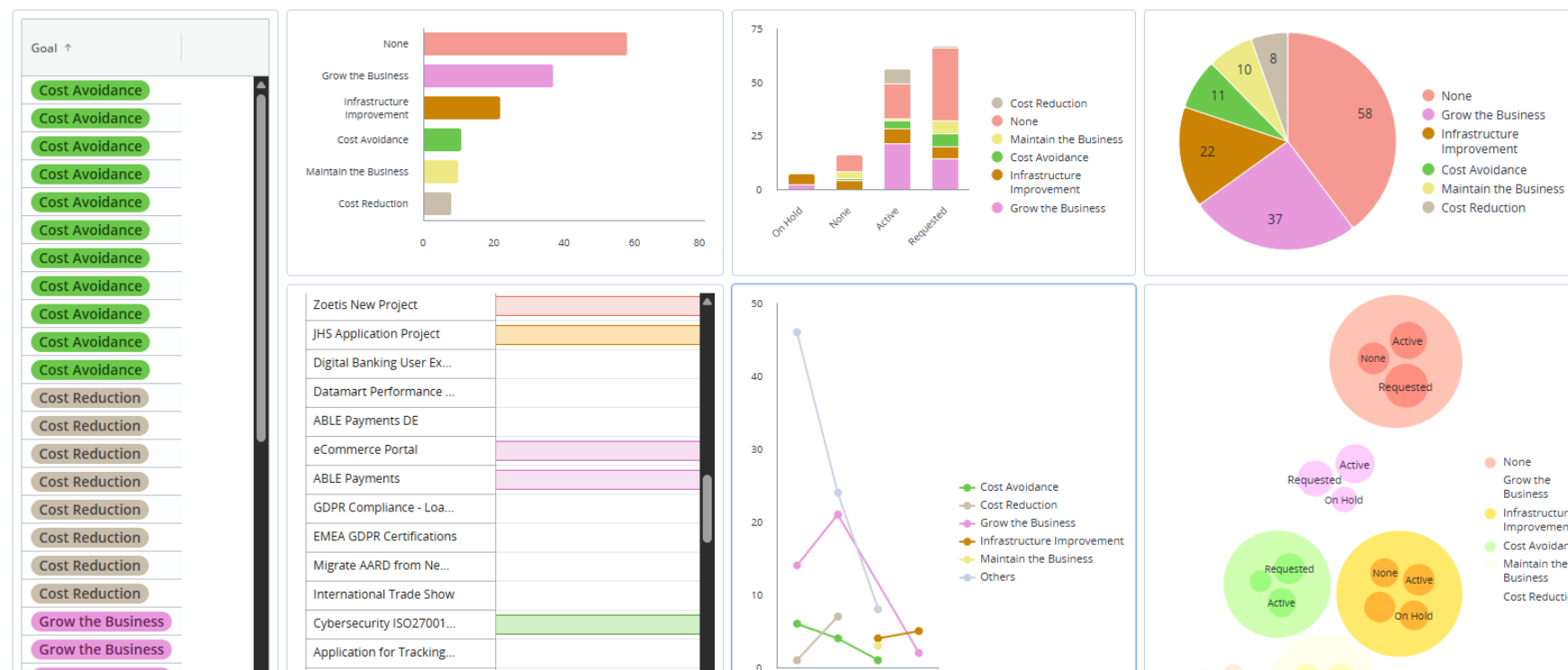
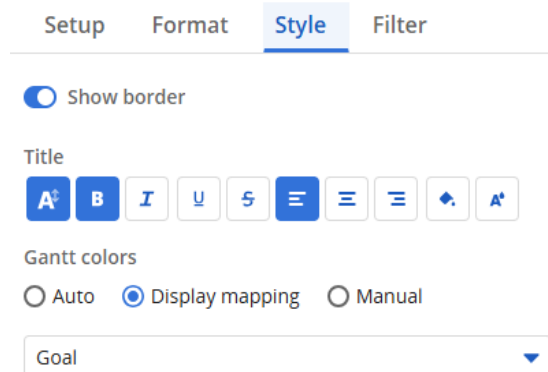
✓ **Cost Reduction**

Maintain the Business

Data Providers – Attributes Display Mapping

- For widget types below, under Style > Color, select Display Mapping

- Table
- Bar Chart
- Pie Chart
- Gantt Chart
- Line Chart
- Split Bubble Chart



Data Providers – Filters, Security

- Refine Filters

Details Objects Joins **Pre-Filter** Security Preview

Match filters **All** Any

▼ Active (Investment) = Yes ▼ Template (Investment) = No

- Enable/Disable Security

Details Objects Joins Pre-Filter **Security** Preview

☐ Do you want to secure this data provider?

Master object *

Investment

- Preview the results for Partial / Full data
 - Export to CSV available

Details Objects Joins Pre-Filter Security **Preview**

Show data
Partial ▼

View query

Group by

Investment ID *	Name *	Start
EPI00000023	Knowledgebase	Feb 15, 2025
EPI00000028	Credit Scoring	Apr 30, 2025

- Publish

Report Designer



Report Designer

- Report Designer provides an intuitive, no-code interface to create, customize, run, and view reports directly within the application.
- Build reports from active, published Data Providers.
- Create visualizations using charts and tables with configurable settings.
- Validate data with Preview or Export before sharing.

Report Designer - Layout formats

- There are 4 format available to use
- **Responsive**
 - Interactive and filter-responsive
 - Designed for user exploration and on-screen analysis
 - Useful for dashboards and dynamic views
 - Maximum width selection – HD Display / Laptop / Tablet
- **Tables(XLSX)**
 - Export full report, including every tab to a single Excel workbook
 - Each tab exports as its own sheet
 - New in 16.4.3

Layout Format ⓘ

☒ Responsive ☐ Fixed ☐ Tables (XLSX) ☐ Data Extraction (CSV)

Maximum width

HD Display (1920px)

Search...

✓ HD Display (1920px)

Laptop (1440px)

Tablet (1024px)

Report Designer - Layout formats

- **Fixed**

- Provides static layout with precise content placement
- Best when consistent formatting is important for PDF or PowerPoint exports
- Size and Orientation can be set

Layout format ⓘ
☐ Responsive ☒ Fixed ☐ Data Extraction (CSV)

Size

Letter

Search...

✓ Letter

Legal

A4

Layout format ⓘ
☐ Responsive ☒ Fixed ☐ Data Extraction (CSV)

Size

Letter

Orientation

Landscape

Search...

✓ Landscape

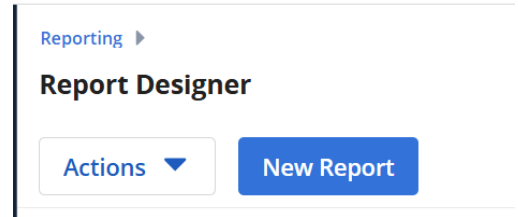
Portrait

- **Data Extraction (CSV)**

- Provides single-pane report layout with a table widget optimized for CSV export

Report Designer

- Navigate to Reporting workspace and click on the Report Designer tile.
- Review and copy existing OOTB Reports that suits the need.
- Or click on New Report button to start the report creation process.
- A dialog box labeled New Report will appear.
- Enter unique name and description

A screenshot of a 'New Report' dialog box. It has a title bar 'New Report' with a close button. The form contains:

- 'Name *' field with the text 'My Custom Report'.
- 'Description' field, which is empty.
- 'Layout format' section with three radio buttons: 'Responsive' (selected), 'Fixed', and 'Data Extraction (CSV)'.
- 'Maximum width' dropdown menu showing 'HD Display (1920px)'.
- At the bottom right, 'Cancel' and 'Create' buttons.

Report Designer

- Choose the desired layout
- Click Create to save and proceed
- Select the Data Provider from the available list and click Save
 - The report designer will not be able to use system data providers to create reports

Select Data Provider

- ▶ ☐ Custom - Investments
- ▶ ☐ Custom - Status Reports across Investments

Report Designer

- An empty canvas with Untitled tab will be visible
 - Rename: Allows to change the name
 - Copy: Creates a duplicate of the tab
 - Delete: Removes the tab
 - Tab settings: allows to select Report Type

Tab settings

Setup Format Filter

Report type

☒ Summary ⓘ ☐ Attribute based ⓘ

Per-Period Metric settings

Type

☒ None ☐ Periods ☐ Duration

ⓘ *Tabs inherit settings from the report. If no settings exist, grand totals are displayed.*

Reporting ▸ Report Designer ▸

My Custom Report

+ Add widgets

Data provider

Settings

Untitled

+

Rename

Copy

Delete

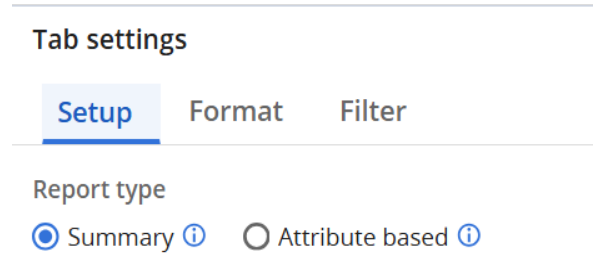
Tab settings

Report Designer - Filters

- Filters help users focus on relevant data
- Multiple filter levels can be combined for more control, they will be enforced from lower to highest level:
 - **Report-level filters:** Apply to the entire report
 - **Tab-level filters:** Apply only to a specific tab
 - **Widget-level filters:** Apply only to an individual widget

Report Designer – Report Type

- Report Type



- Summary: Gives standard report controls and displays a scrollable report based on data configured within widgets
- Attribute based: Displays a paginated report where each page's data is determined by the attribute added to the report

Report Designer – Widget Types

- Report canvas includes options to Add widgets, Data Providers, Settings and Filters

My Custom Report

+ Add widgets

Data provider

Settings

Unit of measure
Hours

Period
Mar 1, 2026 - Apr 30, 2026



Filter
None

Save

Preview

Publish

- Choose a widget from the Add widgets
 - Charts: choose from Number Tile, Progress Ring, Donut, Pie, Bar, Column, Line, Bubble, Split packed Bubble, Gantt
 - Others: Table, Attribute group, Text/Link, Image, Line, Sub-report

+ Add widgets

Data provider

Settings

Widgets

Charts



Others



Report Designer – Choosing the right widget

Select the widget based on the type of insight you want to present.

- **Bar or Column:** Compare values across categories or across periods



- **Line Chart:** Show trends and changes over time.



- **Pie or Donut:** Show how a total is divided among a few categories.



- **Number Tile:** Highlight one key value, such as total cost or project count.



- **Progress Ring:** Show progress toward a target or percentage complete.



Report Designer – Choosing the right widget

- **Table:** Show detailed records, multiple fields, and grouped data
- **Attribute Group:** Display related summary fields together.
- **Text, Image, Line, Link:** Add headings, explanations, branding, or navigation.
- **Gantt:** Schedule and timeline



Report Designer - Number Tile

- Pick Number tile and drag and drop to the desired location on the canvas.
- For this example, we are building tile to get Actuals YTD
- On the Chart properties, pick the Data Provider and enter the Title.
- For the Metric choose Average/Count/Maximum/Minimum/Sum
- Select the metric from the list

Chart properties

Setup

Format

Style

Filter

100 Number tile

Data Provider

Investments Provider for Reporting Exercise

Title

Actual Spend YTD

Metric

Sum

Actual Cost

X

Report Designer - Number Tile

- On the Per-Period Metrics settings, pick the Type and Calendar.
- Choose the Metric format – Number/Percent

Chart properties

Setup **Format** Style Filter

Metric format

☒ Number ☐ Percent

Padding

8 px

Chart properties

Setup **Format** Style Filter

Type

☐ None ☒ Periods ☐ Duration

Calendar

☒ Fiscal ☐ Standard

Periods

Months

Start period

Start of current year

End period

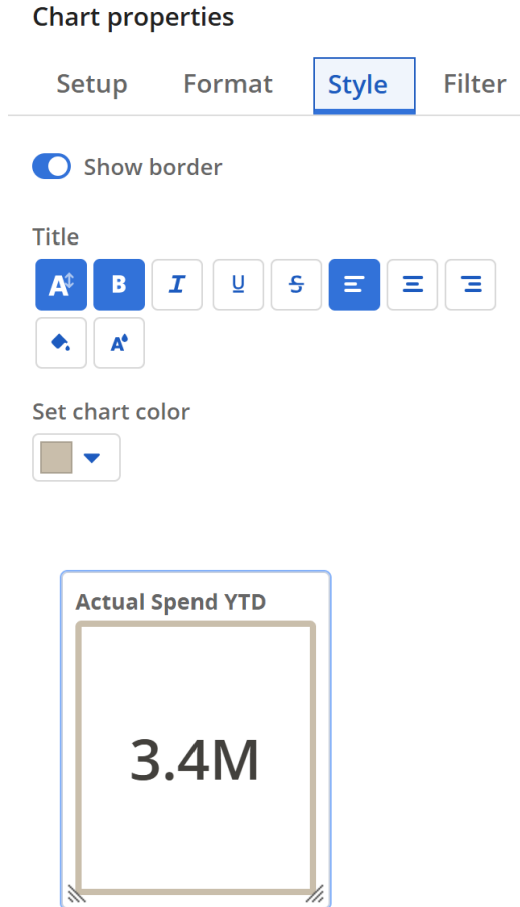
Current period

Totals calculation

☐ Sum of periods ☒ Grand totals

Report Designer – Number Tile

- Pick the Style for the Title – size, bold, italics, underline, strikethrough, alignment, font color and background
- Add any widget level filters if necessary, in the Filter tab.
- Validate the output in the Number Tile widget displayed on the canvas.



Report Designer - Progress Ring

- Choose Progress Ring from the widgets list and configure the properties
 - Ex: Count of Open Risks

Chart properties

Setup Format Style Filter

Progress ring

Data Provider

Risks Provider for Reporting Exercise

Title

Open Risks

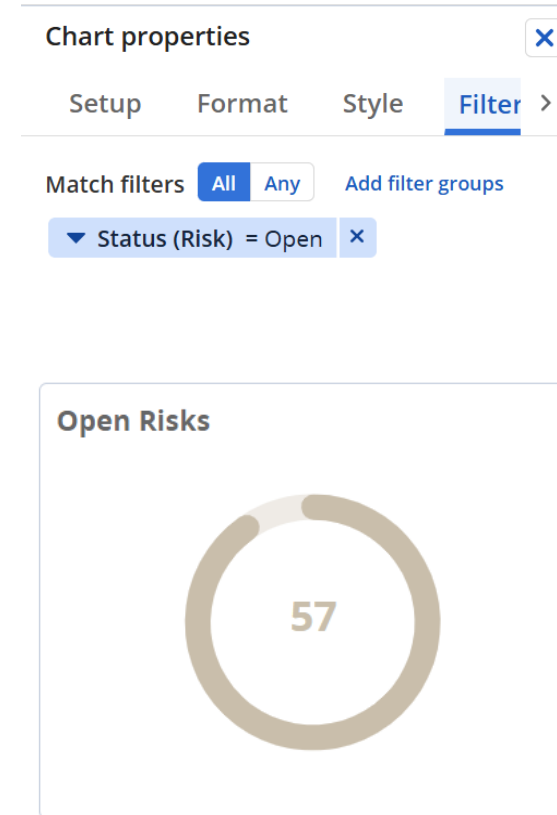
Metric

Count *Counts the entire record set*

Per-Period Metric settings

Type

☒ None ☐ Periods ☐ Duration



Report Designer - Pie Chart

- Select Pie Chart from widgets list
 - Ex: Projects count by Manager
 - Set the properties to show max number of slices in the pie, all the others will be grouped as Others if the checkbox is selected

Chart properties

Setup Format Style Filter

Pie chart

Data Provider
Projects Provider for Reporting Exercise

Title
Projects by Manager

Dimension
Manager

Metric
Count *Counts the entire record set*

Sort by
Manager

Chart properties

Setup Format Style Filter

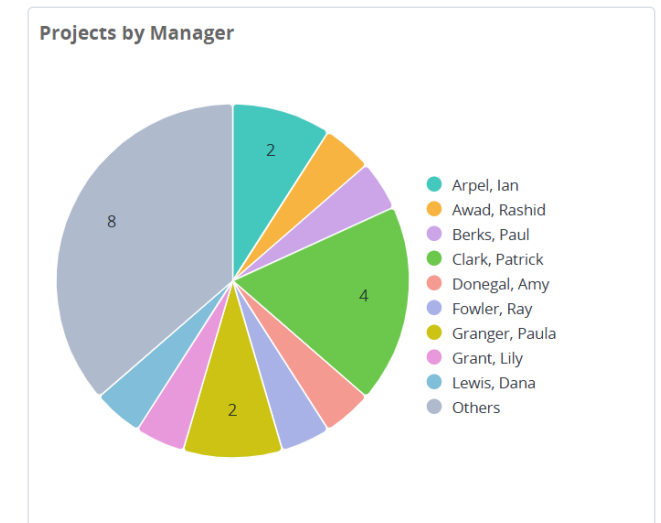
Maximum slices
10

☒ Group others

Metric format
Number

Legend
Right

Padding
8 px



Report Designer - Donut chart

- Pick Donut chart from the Add widgets menu
 - Ex: Projects by Schedule Status

Chart properties

Setup Format Style Filter

Donut chart

Data Provider

Projects Provider for Reporting Exercise

Title

Projects by Schedule status

Dimension

Schedule Status

Metric

Count *Counts the entire record set*

Sort by

Count

Sort order

☐ Ascending ☒ Descending

Per-Period Metric settings

Type

☒ None ☐ Periods ☐ Duration

Chart properties

Setup Format Style Filter

Maximum slices

4

☐ Group others

Metric format

Number

Legend

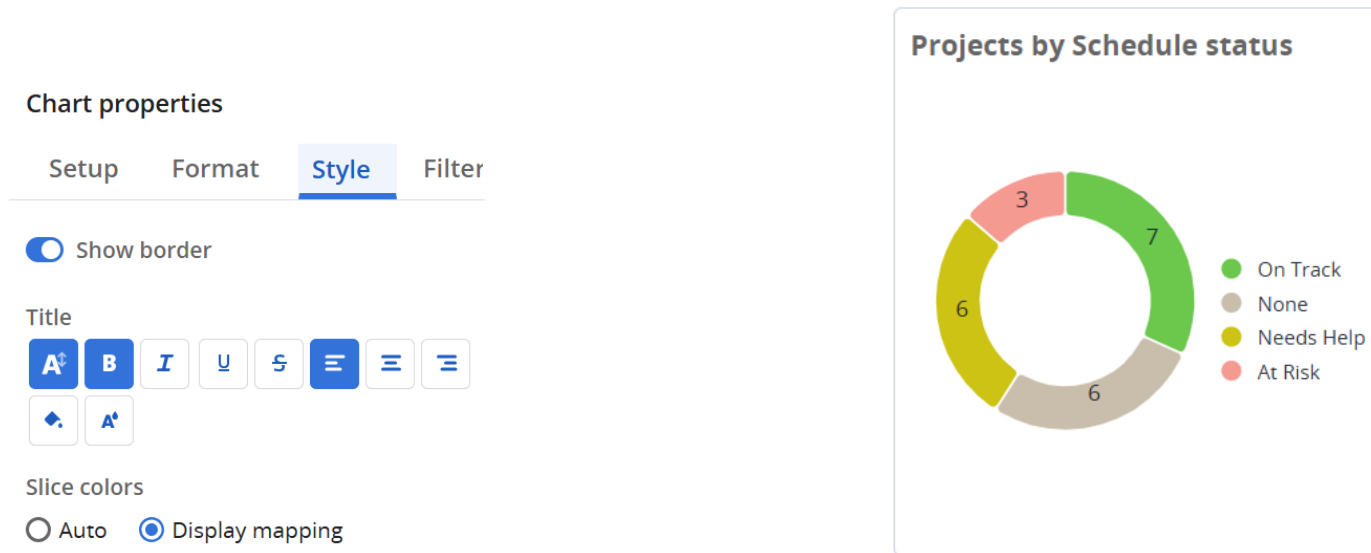
Right

Padding

8 px

Report Designer - Donut chart

- In the Style tab, slices colors can be set.
- Choosing Display mapping here will show the colors based on the attribute's display mappings at the object level in Classic Administration -> Objects



Report Designer - Bar chart

- Ex: Planned Cost/Benefit by Manager
 - In the Dimension, pick Manager

Chart properties

Setup

Format

Style

Filter

Data Provider

Investments Provider for Reporting Ex...

Title

Planned Cost/Benefit

Dimension

☐ Periods

Manager

Breakdown dimension

Select Breakdown Dimension

Metrics

Sum Planned Cost

Sum Planned Benefit

Select ty... Select metric

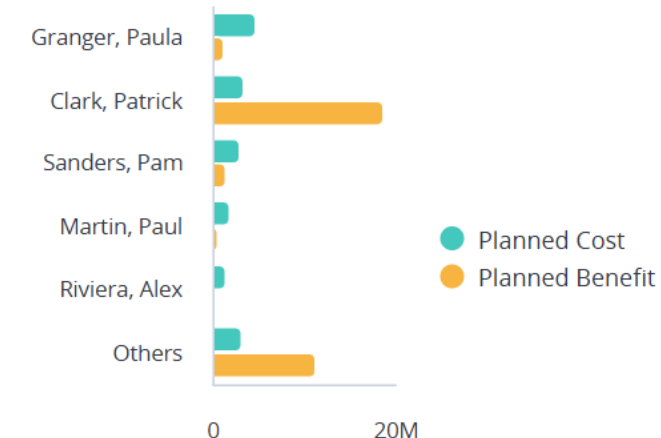
Sort by

Planned Cost

Sort order

☐ Ascending ☒ Descending

Planned Cost/Benefit



Report Designer - Bar chart

- If additional grouping is needed, select the Breakdown dimension
 - Ex: Planned cost by Category & Type

Chart properties

Setup Format Style Filter

Bar chart

Data Provider
Investments Provider for Reporting Exer...

Title
Planned Cost by Category & Type

Dimension ☒ Periods
Project Category

Breakdown dimension
Project Type

Metric
Sum Planned Cost

Sort by
Planned Cost

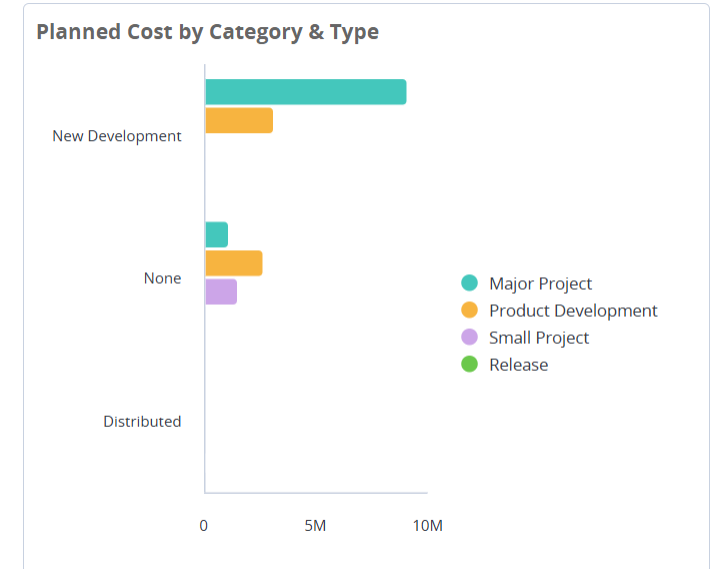
Sort order
☐ Ascending ☒ Descending

Breakdown sort by
Project Type

Breakdown sort order
☒ Ascending ☐ Descending

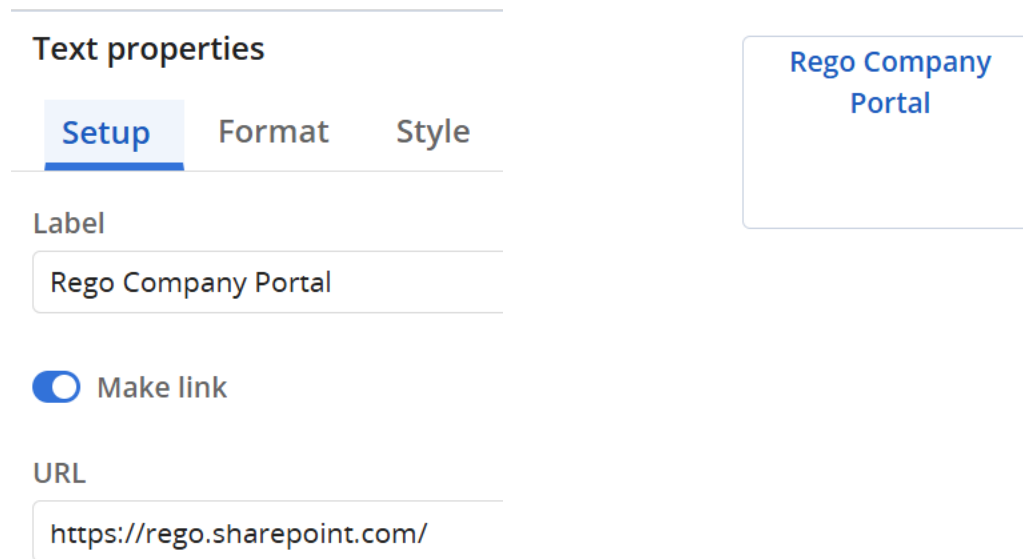
Per-Period Metric settings

Type
☒ None ☐ Periods ☐ Duration



Report Designer - Text/Link

- Text/Link widget allows to enter static texts
- Optionally the text can be made as hyperlinks – only static URLs supported at this point



The screenshot shows the configuration interface for a Text/Link widget. On the left, there is a sidebar with the title "Text properties" and three tabs: "Setup" (which is selected and highlighted with a blue underline), "Format", and "Style". Below the tabs, there are three sections: "Label" with a text input field containing "Rego Company Portal"; "Make link" with a blue toggle switch turned on; and "URL" with a text input field containing "https://regos.sharepoint.com/". To the right of the sidebar is a preview area showing a rounded rectangle with the text "Rego Company Portal" in blue, indicating that the link option is active.

Report Designer - Table

- Table widget is powerful component that can include multiple columns from any configured Data Provider.
- Allows grouping, formatting columns and displays totals.

Table properties

Setup Format Style Filter

Data Provider

Custom - Investments

Title

Columns

Select

Search...

- > Per-Period Metrics
- > Investment
- > Status Report
 - ☐ Cost and Effort Status
 - ☒ ID *
 - ☐ Key Accomplishments
 - ☐ Object Key
 - ☐ Overall Status
 - ☐ Parent Reference
 - ☐ Report Date
 - ☐ Schedule Status

Manager

Investment ID	Name *
Total	
None (1)	
ID1054	SAP S/4 HANA Up
Admin, PMO (2)	
ID1059	Tech Idea
ID1061	Tech
Amos, Cheryl (2)	
EPI00000034	Commercial Cred
PR2090	IT Network and S
Andersson, Peter (6)	
PR2003	BIAnywhere Rele
PR2003	BIAnywhere Rele
PR2003	BIAnywhere Rele

Pin Column >

Autosize This Column

Autosize All Columns

Wrap text

Add link

Group by Name

Rename column

Header Alignment >

Header Background

Header Text Color

Hide Icons >

Cell Alignment >

Report Designer - Table

- Use the conditional formatting option on the widget for formatting entire row or column.

The screenshot displays the Report Designer interface. At the top, a table widget titled "Manager" is shown with columns: "Investment ID", "Name *", "Start", and "Finish". A yellow tooltip with icons for settings, data, and deletion is visible over the table. Below the table, the "Conditional formatting" panel is open. It includes a "New rule" button and a "Collapse all" dropdown. The "Rules" section shows a rule with the condition "Project Type (Project) = Major Project". The "Format" section shows the text "AaBbCcYyZz" in a yellow box. The "To" section shows "Entire Row". The "Actions" section shows icons for visibility, data, and deletion.

Conditional formatting

New rule Collapse all

Rules

Set conditions All Any

Project Type (Project) = Major Project + Add condition Remove all

Format To Actions

AaBbCcYyZz Entire Row

Report Designer - Attribute Group

- Attribute Group widget controls attributes, grouping and filters for other widgets on the same tab based on Attribute container values.
- To add it, go to the report canvas and click + Add controls.
- In Tab Settings, select Attribute Based as the Report Type.
- You cannot add an Attribute Group when Report Type is set to Summary.

Tab settings

Setup

Filter

Report type

☐ Summary ⓘ

☒ Attribute based ⓘ

Data Provider

Custom - Investments

Report Designer - Attribute Group

- If a tab has multiple Attribute Groups, all must use the same data provider, and additional groups default to the first Attribute Container's data provider.
- Once you select a data provider, hover over the Attribute container to open the properties
- Use +Add attributes to select an attribute to include in container.
- Use +Add metrics to add numeric attributes

Attribute group properties

Setup

Format

Style

Data Provider

Custom - Investments

Title

+ Add attributes ⓘ

+ Add metrics

Report Designer – Gantt Chart

- Add a Gantt widget and select a data provider with start/finish date
- From the column picker, select columns to add to the left side of the Gantt

Columns

Name, Investment ID, Manager, Budget Cost, Actual Cost, Work Status, Rep...

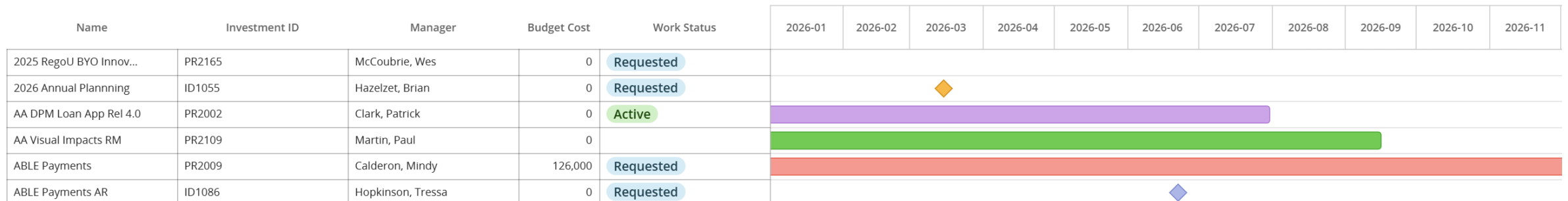
Q Search...

- ▶ Investment
- ▶ Project
- ▶ Idea
- ▶ Status Report

Clear selected

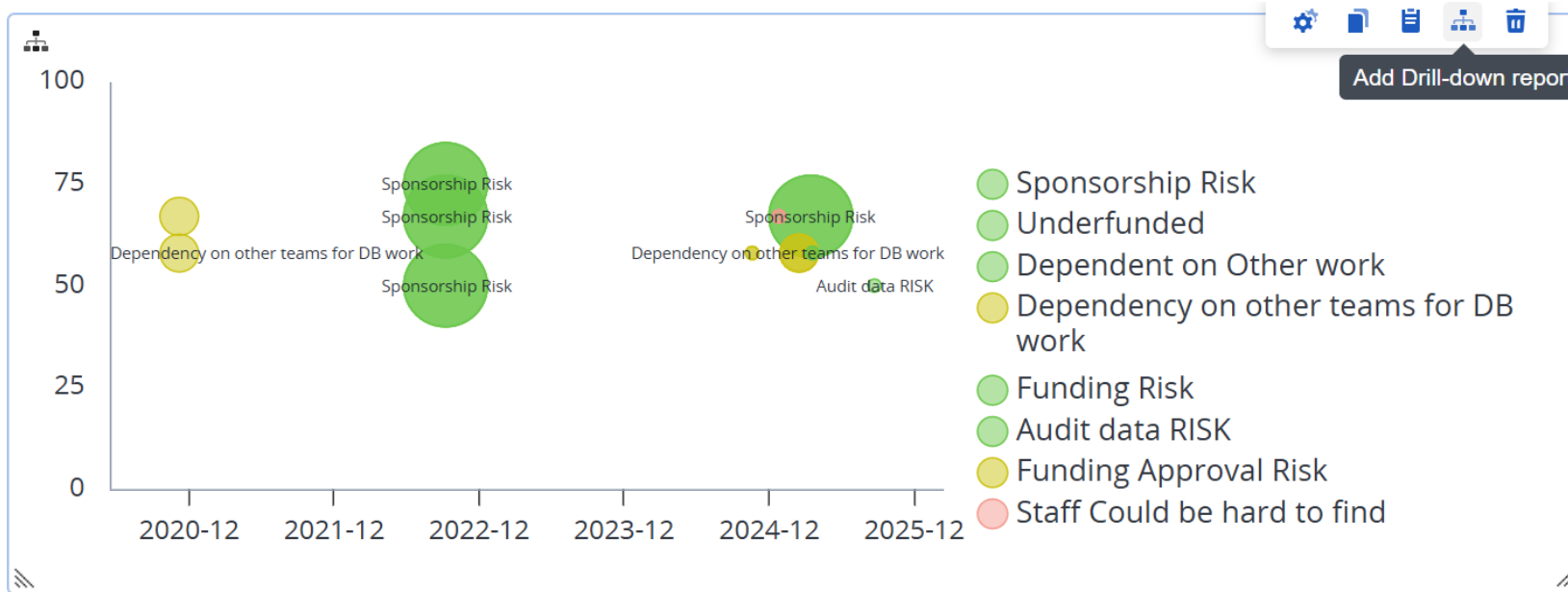
Apply

- Add Start/finish date and view the Gantt



Report Designer – Bubble Chart

- Add a bubble chart widget and select a data provider
- Specify x- and y-dimension to date or numeric fields, and metric
- Add a drill-down report if needed



X-dimension ⓘ

Business Alignment

Y-dimension

Target Resolution Date

Metric

Count

Counts the entire record set

Sort by

Count

Sort order

☐ Ascending

☒ Descending

Per-Period Metric settings

Type

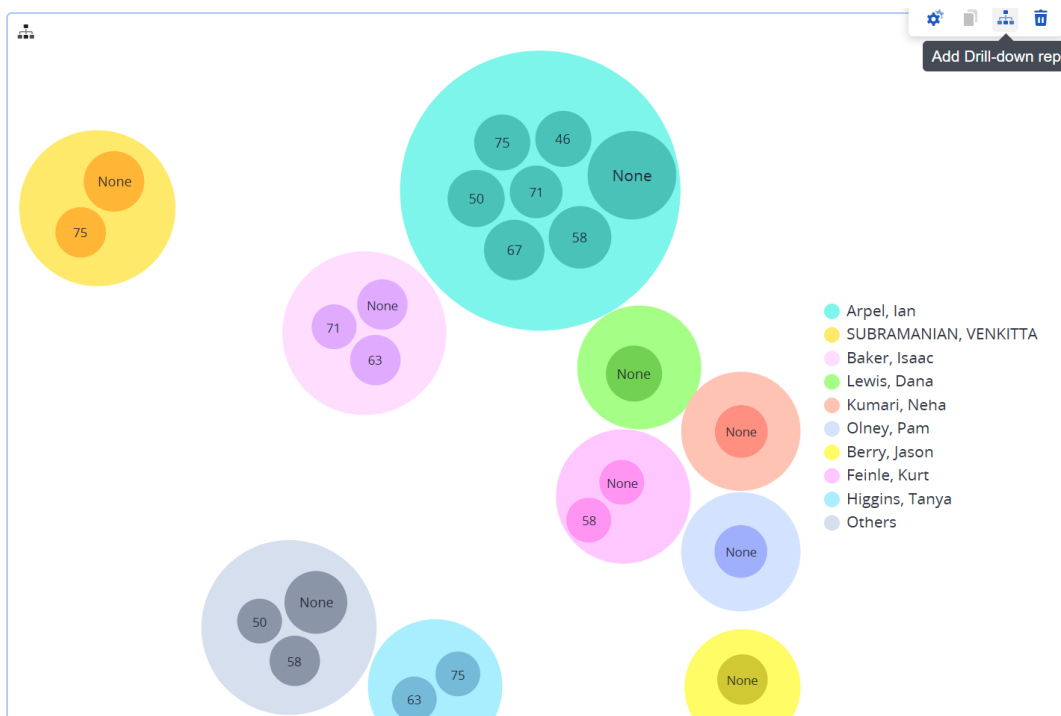
☒ None

☐ Periods

☐ Duration

Report Designer – Split Bubble Chart

- Add a split bubble chart widget and select a data provider
- Specify dimension, breakdown dimension and metric
- Add a drill-down report if needed



Dimension

Assigned To

Breakdown dimension

Business Alignment

Metric

Count

Counts the entire record set

Sort by

Count

Sort order

☐ Ascending

☒ Descending

Breakdown sort by

Count

Breakdown sort order

☐ Ascending

☒ Descending

Per-Period Metric settings

Type



None



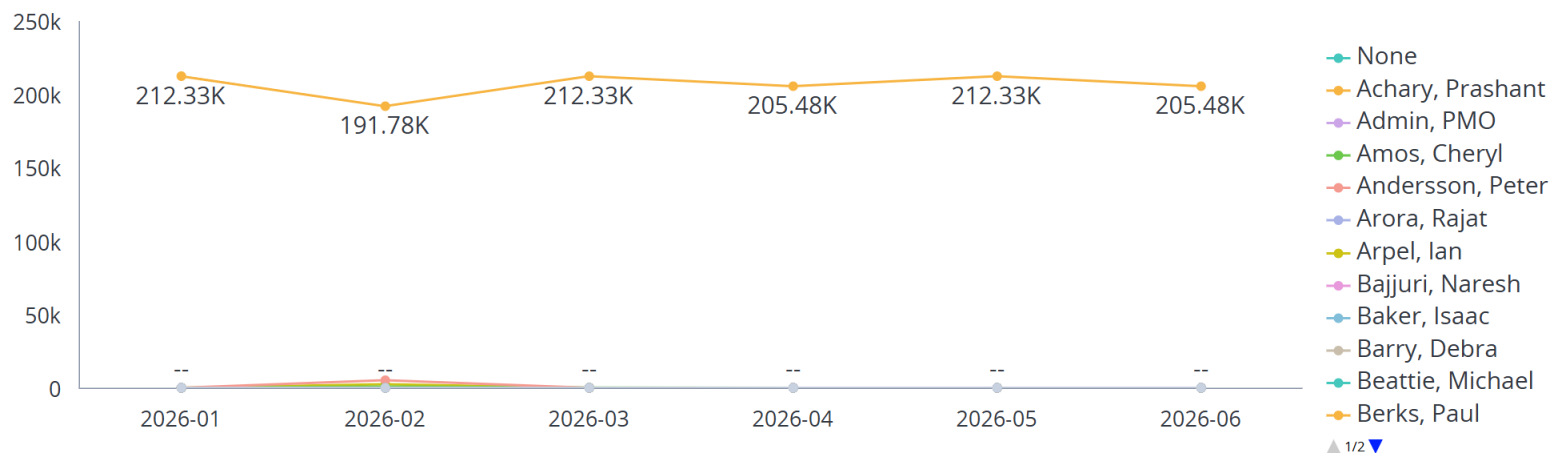
Periods



Duration

Report Designer – Line Chart

- Add a line chart widget and select a data provider
- Dimension (x-axis) could be periods, or a selected field
- Add metric, and breakdown dimension if needed



Dimension ☒ Periods

✦ Periods

Breakdown dimension

Manager

Metric

Sum

Forecast Cost

Sort by

✦ Periods

Sort order

☒ Ascending ☐ Descending

Breakdown sort by

Manager

Breakdown sort order

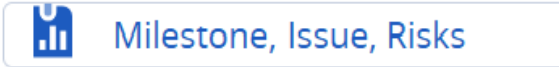
☒ Ascending ☐ Descending

Per-Period Metric settings

Type

☒ None ☐ Periods ☐ Duration

Report Designer - Subreport

- Add a subreport widget and select a data provider 
- Configure subreport type:
 - Extension Report: allows the current report to render overflow content or additional attributes beyond a single page
 - Mapping Report: Nests a related subreport, displaying data based on a defined relationship with the current report
- When creating a program report to map on the Parent field, toggle on “Apply parent investment mapping”

Subreport type ⓘ

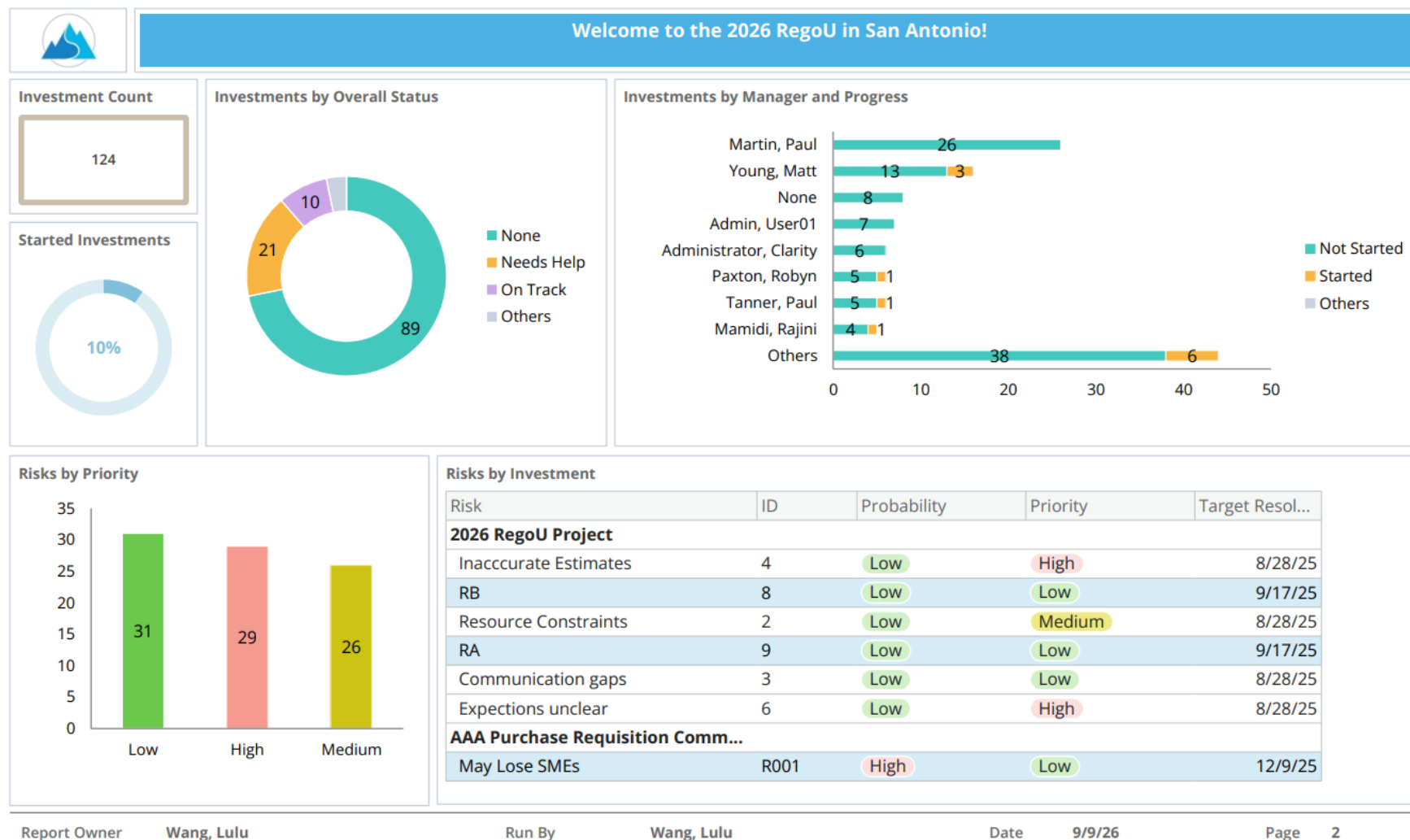
☒ Extension report ☐ Mapping report

☐ Apply parent investment mapping ⓘ

- Click into the subreport canvas to add data provider and widgets

Report Designer

- Once the design of the report is complete, Preview and Publish it.



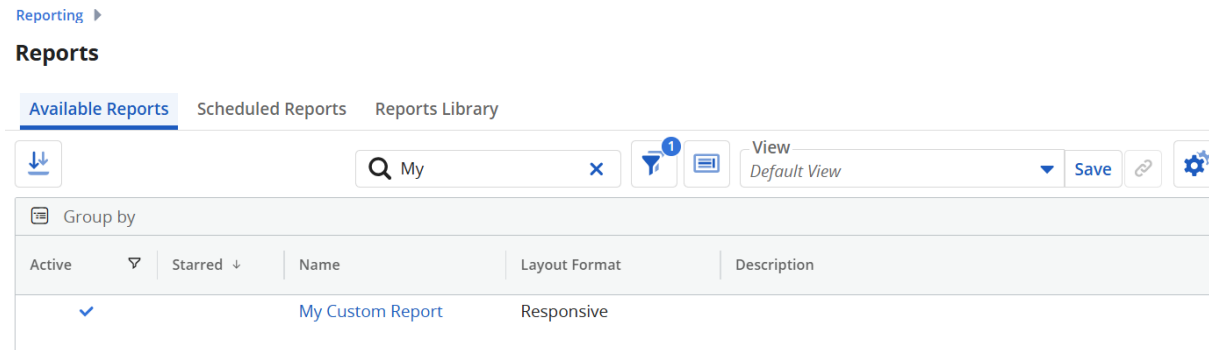
Reports

Reports

- Reports tile is a read-only interface that lists all the reports a user can access.
- Supports reports execution, scheduling, sharing and export.
- Embed reports in Blueprint channels, add them to navigation menus, and control visibility through permissions.

Reports

- Navigate to Reports to see the published report in Available Reports tab.



- Scheduled Reports tab lists reports schedules you can view or manage.
- Reports Library tab stores output from both scheduled runs and on-demand exports from the report viewer.

Reports - Export

- Based on the Layout Format, export options are available when you view the report
 - Responsive: None
 - Fixed: PPTX/PDF
 - Data Extraction: CSV
 - Table: XLSX
 - Table widget can be exported to Excel

Reports - Filters

- If enabled by the designer, report users can customize filter groups and filters

Reporting > Reports >

Status Report

Unit of measure: FTE

Match Filter Group **All** Any

All Any ▼ Investment Type (Investment) = BAU / Other Work; Applications × + Add filter

All Any ▼ Overall Status (Status Report) Select × + Add filter

+ Add group Remove filter groups Apply

Filter

Lulu's Yellow Projects ▼

Manage Save as

Search...

My Filters

Lulu's Red Projects

▼ Lulu's Yellow Projects

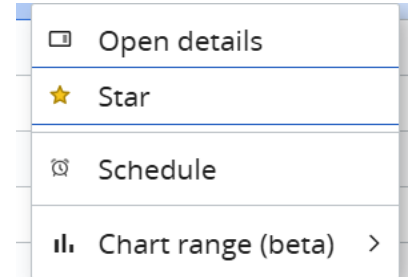
Recommended

None

- Users could also save customized filter views for easy navigation

Reports - Scheduling

- Report Scheduling is available from Reports tile
- Only available for Fixed, Table and CSV Layout Formats
- Not available for Responsive layout
- Right click on the report name to see the Schedule option
- Can run immediately or enable recurrence

A screenshot of the 'Schedule' tab in a report configuration interface. The tab is highlighted in blue. Above it are other tabs: 'Filter', 'Export', 'Share', 'Email', and 'Notify'. The 'Run on' section shows a date picker set to 'Mar 26, 2026' and a time selector set to '2:24 PM'. Below this is a toggle switch for 'Enable recurrence', which is currently turned on. The 'Repeat Every' section has a dropdown menu set to 'Week'. The 'Repeat On' section has checkboxes for 'All', 'Sun', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', and 'Sat', with 'All' selected. The 'Ends' section has two radio buttons: 'Never' (selected) and 'On a Date'.

Reports - Scheduling

- Pick the necessary filters

Schedule **Filter** Export Recipients Email content

Filter
None

Unit of measure
☐ FTE ☒ Hours

Period < 9/1/26 - 8/31/27 >

Match filters **All** Any Add filter groups

Department (Resource) Select x Manager (Resource) = Miller, Rosie x
 Booking Manager (Resource) Select x Primary Role (Resource) Select x
 Person Type (Resource) Select x Booking Status (Staff) Select x Department (Investment) Select x
 Work Status (Investment) Select x Is Role (Resource) = No x Is Team (Resource) = No x

+ Add filter Remove all

- Configure the Export options

Schedule Filter **Export** Recipients Email content

Format
☒ PDF ☐ PPTX
☐ Report bursting ⓘ
☐ Export filters as last page ⓘ

Hide tabs

☐ Hide tab title pages

Language
 English

Locale
 English(United States)

Date display
☒ Sep 1, 2026 ☐ 9/1/26

Reports - Scheduling

- Share it with Clarity users, Security Groups or emails (could be external emails)

Schedule Filter Export **Recipients** Email content

- Check the Email to box send scheduled outputs to as an attachment or with a link to Report Library to internal or external recipients

Schedule Filter Export **Recipients** Email content

☒ Share
 ☒ Email
 ☐ CC
 ☐ BCC
 ☐ Notify on completion
 ☐ Notify on failure

	Share	Email	CC	BCC	Notify on completion	Notify on failure	Delete
RegoU 2026 Clarity Reporting	☒	☒	☐	☐	☐	☐	Delete

Attachments

☒ Report as attachment
 ☐ Add Reports Library link

- Check the Notify boxes to send the status of the schedule (failure or completion)

Schedule Filter Export **Recipients** Email content

☒ Share
 ☒ Email
 ☐ CC
 ☐ BCC
 ☒ Notify on completion
 ☒ Notify on failure

	Share	Email	CC	BCC	Notify on completion	Notify on failure	Delete
Wang, Lulu lulu.wang@regoconsulting.com	☒	☒	☐	☐	☒	☒	Delete

Reports - Scheduling

- Scheduled report outputs are available to download from the Reports

Reporting ▶

Reports

Available Reports

Scheduled Reports

Reports Library



Select all Deselect all

 Group by

	Name	Download	Report	Status	Run By	Format	Finish ↓
☐	Sentinel - Risk & Issue Policy		Sentinel - Risk & Iss...	Completed	Arpel, Ian	CSV	Mar 24, 2026...

Key Features – Data Provider

Key Features - Data Provider

- Utilize the Data Warehouse Schema Explorer (Beta in 16.4.2) to view table relationships and what fields to join on

Data Warehouse Schema Explorer

Data Warehouse Schema ✕

✕

▼ Tables

- ✓ **dwh_inv_investment**
- dwh_inv_investment_crv_facts
- dwh_inv_investment_ln

dwh_inv_investment

Stores the generic properties that apply to all investments.

Details Related tables

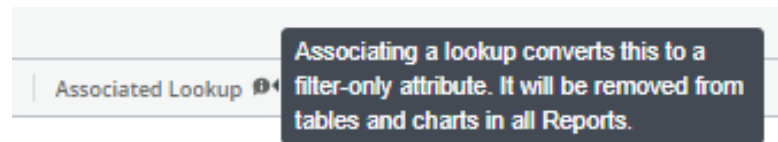
dwh_fin_benefit_period_facts
Benefit plan metrics broken out by fiscal periods.
investment_key

dwh_fin_benefit_summary_facts
Benefit plan metrics summarized to the benefit detail record.
investment_key

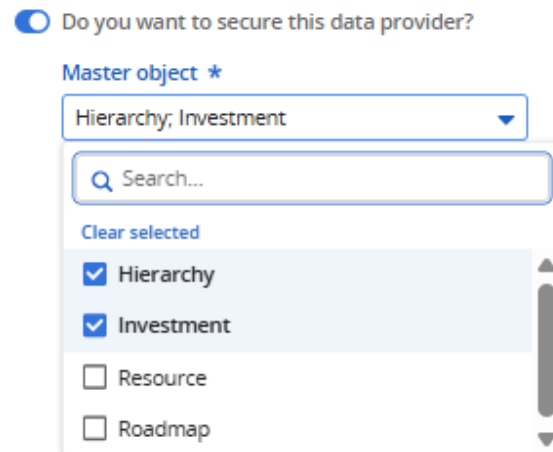
dwh_fin_plan_period_facts
Financial cost plan/budget metrics broken out by fiscal periods.
investment_key

Key Features - Data Provider

- In custom queries, associate an attribute to a lookup defined in Clarity. It can then be used as a filter only.



- Apply optional security on Resource/Investment/Roadmap/Hierarchy



Key Features – Report Designer

Key Features – Report Designer

- OOTB Per-Period Metrics and Period Filter

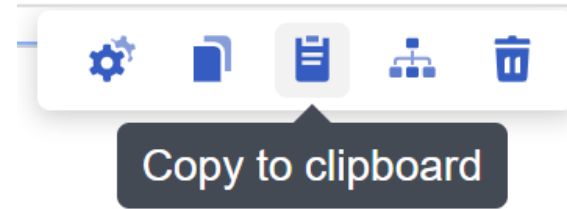
- Designers can specify which Unit of Measure users can choose from (FTE/Hour/Day/% Availability)

- Pre-defined Filter Views

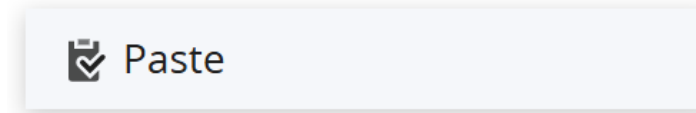
- Designers can configure filters to Hide/Unlock/Lock/Required

Key Features – Report Designer

- Use Copy to Clipboard to a widget



- In a new tab, or a new report, click Paste



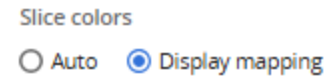
- It copies over the Data Provider too if not already exist
- Doesn't apply to attribute groups, or subreports

Key Features – Report Designer

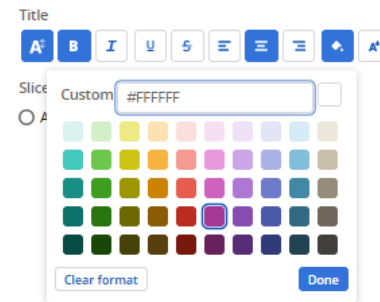
- Enable drill-down for deep dive (not available for tables on 16.4.1)



- Color coding Pie/Bar chart by Object Color Mapping

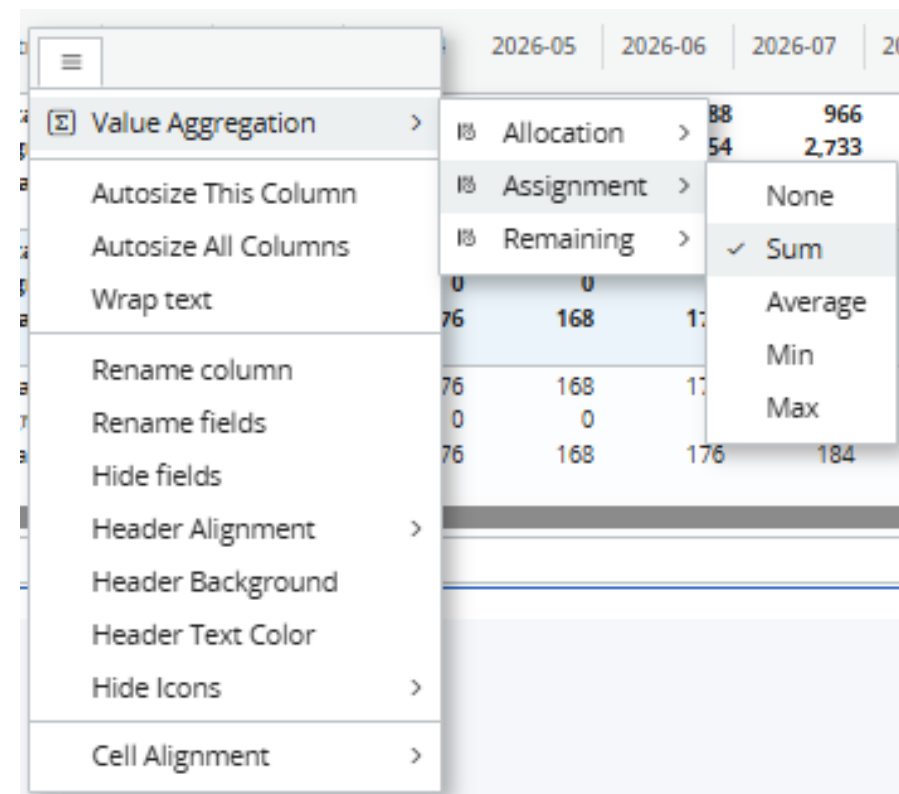
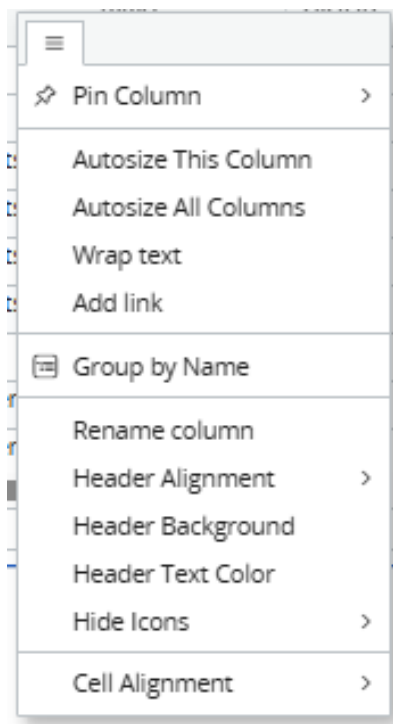


- Color coding titles with HEX codes



Key Features – Report Designer

- In a table widget, click the hamburger menu on each field for more tailored configuration
 - Rename fields
 - Alignment
 - Hide Icon
 - Aggregations for numeric fields etc.



- ### Value aggregation

Apply all

Total row

Group row 1 (Resource)

Availability

None

Sum

Average

Min

Max

Allocation

None

Sum

Average

Min

Max

Remaining

None

Sum

Average

Min

Max

Summary

Total row

Group row 1 (Resource)

Availability: Sum

Availability: Sum

Allocation: Sum

Allocation: Sum

Remaining: Sum

Remaining: Sum

Key Features – Report Designer

- In a table widget, option to enable Expandable Tree for Task or OBS

☒ Enable Expandable Tree

Tree type

Task

☒ Display parent

Name *	Manager	Status
▶ **ABLE Payments Digital Experience	Amos, Cheryl	
▼ ABLE Payments 2.0	Amos, Cheryl	
▼ Initiation Phase		Completed
Initiating Process Complete		Completed
New Task		Not Started
▶ Planning Phase		Started
▶ Construction Phase		Completed
▶ Deployment and Quality Phase		Started
▶ Closing Phase		Started

Key Features – Report Designer

- Designers could secure Reports by associating the hidden report object with OBS

Associated Objects

☐	Object	
☐	Application	Any Unit ▾
☐	Asset	Any Unit ▾
☐	Idea	Any Unit ▾
☐	Other Work	Any Unit ▾
☐	Process Definition	Any Unit ▾
☐	Product	Any Unit ▾
☐	Project	Any Unit ▾
☐	Report	Any Unit ▾
☐	Resource	Any Unit ▾
☐	Service	Any Unit ▾

Add **Remove**

OBS: Organizational | Unit: Business Technologies - *Instances Attached to Unit*

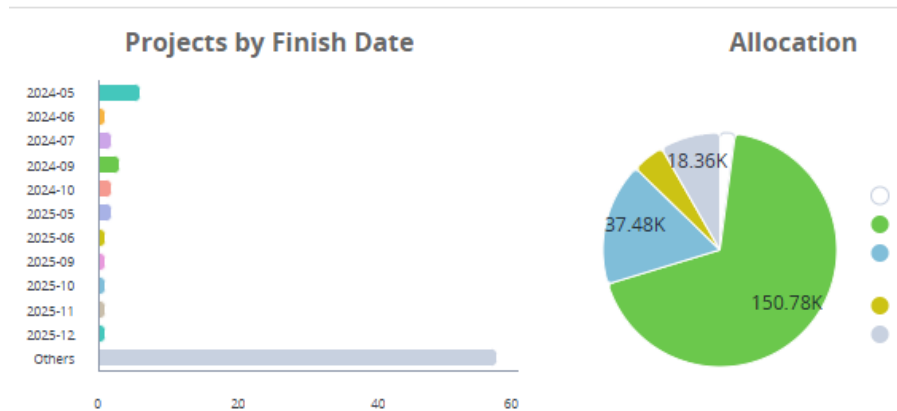
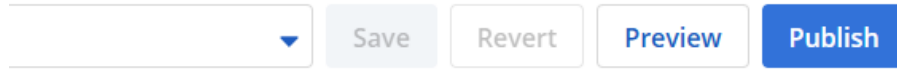
OBJECT		
Report		
> Filter: None ▾		
☐	Dashboard ▲	
☐	Capacity vs. Demand by Resource (Sample)	SYSRPT00001
☐	Copy Financial Forecast Review by Investment and Transaction History (Sample)	RPT000000062

Group by		
ID *	Department OBS ↑	Organizational
☐ RPT00000003	Corporate:ABLE ... Unit/Marketing	
☐ RPT00000002	Corporate:IT/Development ▾	All ... Technologies
☐ RPT00000059		
☐ SYSRPT00001		
☐ SYSRPT00002		
☐ SYSRPT00003		
☐ SYSRPT00004		

-- None --
☒ Corporate:IT/Development

Key Features – Report Designer

- Preview reports directly from the Report Designer before publishing



- For CSV/Fixed reports, export from preview to save validation time



Key Features – Report Designer

- For Fixed reports, customize a footer that can be repeated on each page's export file
 - Report Owner
 - Run by (user who ran or scheduled a report)
 - Date
 - Page

☒ Show footer

Report footer properties

Setup

Format

Style

☒ Report owner ⓘ

☒ Show label

Label *

Report owner

☒ Run by

☒ Show label

Label *

Run by

☐ Date ⓘ

☐ Page

ⓘ

The footer will only be available in the report designer and exported files, not in the report's viewer.

Key Features – Report Designer

- You could design your report to support multi-currency once enabled
 - Missing exchange rates will result in blank widgets
 - Clarity uses weighted averages for periods with fluctuated rates

Financial Management Processing

Transactions

ALLOW CHARGEABLE OVERRIDE



USE MULTI-CURRENCY



(Multi currency can be enabled only once, a multi-currency system can not be converted to a single currency system)

APPLY CURRENCY PRECISION FOR RATE/COST



	From Currency ▲	To Currency	Conversion Rate	Rate Calculation Method	Exchange Rate Type	Effective Date
☰	EUR	USD	1.142	Multiply	Average	7/1/26

Currency: None | Period: 5/1/25 - 4/30/26 | Filter: None2

Search...
-- None --
EUR
USD

by Department and Manager | Copy Financial

Budget 59.73M | **Forecast** 1.38M | **Variance** 58.35M

Schedule | **Filter** | Export

Filter: None2

Currency: None

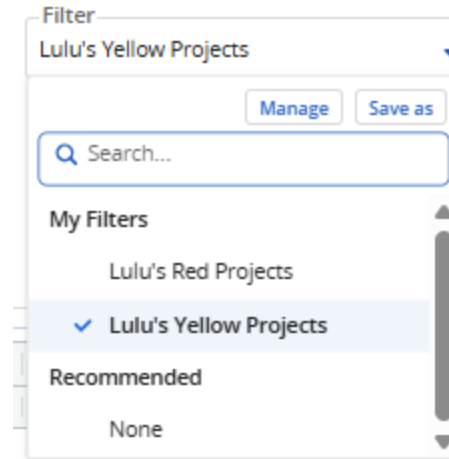
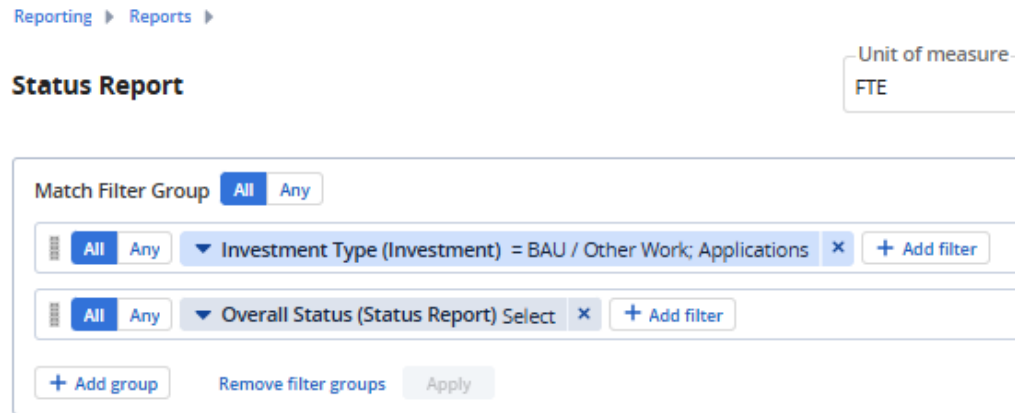
Search...
-- None --
EUR
USD

- When scheduling report, specify the currency type

Key Features – Reports

Key Features – Reports

- If enabled by the designer, report users can customize filter groups and filters



- Users could also save customized filter views for easy navigation

Key Features – Reports

- Revert filter restores filters, Unit of Measure, and Period settings to the last saved configuration
- Useful after temporarily adjusting a report for ad hoc analysis
- Revert does not create or update a saved filter – save first if you want to keep the changes

Unit of measure: Hours ▼ | Period: 7/1/26 - 6/30/27 ◀ ▶ | Filter: None ▼ | Save Revert Schedule

Match filters: All Any Add filter groups

▼ Department (Resource) Select ×
▼ Manager (Resource) Select ×
▼ Booking Manager (Resource) Select ×
▼ Primary Role (Resource) Select ×

▼ Person Type (Resource) Select ×
▼ Booking Status (Staff) Select ×
▼ Department (Investment) Select ×
▼ Work Status (Investment) = Requested ×

▼ Is Role (Resource) = No ×
▼ Is Team (Resource) = No ×
+ Add filter
Remove all
Apply

Key Features – Reports

- Utilize the Type and Category lookups for customized grouping and filtering of reports

Reporting ▶

Report Designer

Actions ▼

New Report

Match filters

All

Any

Add filter groups

▼ Type Select ×

+ Add filter

Remove all

Select all Deselect all

Group by		
ID *	Type ▼	Category
☐ RPT00000068		
☐ RPT00000071		
☐ RPT00000073		
☐ RPT00000076		

Lookup: Report Type - General

* LOOKUP NAME

Report Type

* → * LOOKUP ID

RPT_REPORT_TYPE

* CONTENT SOURCE

niku.com

→ SOURCE

☐ Static List

SORT ORDER

☒ Alphanumeric

☐ Manual

☐ Static Dependent Lists

☐ Dynamic Query

DESCRIPTION

Different types of Reports

Lookup: Category - General

* LOOKUP NAME

Category

* → * LOOKUP ID

REPORT_CATEGORY

* CONTENT SOURCE

niku.com

→ SOURCE

☐ Static List

SORT ORDER

☐ Alphanumeric

☒ Manual

☐ Static Dependent Lists

☐ Dynamic Query

DESCRIPTION

Report Category

Key Features – Reports

- Export an individual table widget to Excel (.xlsx) without exporting the full report
- Available for Fixed and Responsive report layouts
- Export reflects the table's current state: filters, sorting, grouping, date ranges, styling, and per-period metric orientation

Project Type / Project	Manager	ID *	Start	Finish	Overall Status	Business Alignment	Risk Score	Days Late	
Total									
None									
PR2124	Arpel, Ian	PR2124	3/12/26	10/23/26				0	
Major Project									
ABLE Payments	Lewis, Dana	PR2009	1/26/24	12/30/26	On Track: 30	Good Alignment: 88	35	29	
ABLE Payments 2.0	Amos, Cheryl	PR2112	12/20/23	7/15/27	Needs Help: 70		30	0	
AI Enablement: Strategic Alignment Office	Berks, Paul	PR2137	6/11/26	12/31/26	Needs Help: 40		0	0	
Agentic AI for Salesforce	Werner, Bob	PR2145	7/13/26	1/15/27			0	0	

1 - 50 of 84 < > >>

Key Features – Reports

- Copy an existing schedule, and adjust variations e.g., language, currency, export format, or filters
- Copied schedules are created in Paused status – update as needed, then Resume

Copy Report Schedule

Name *

Copy Scheduled Capacity vs Demand Report

- Option to hide tab title pages or selected tabs in scheduled exports

Schedule Filter **Export** Recipients

Format

☒ PDF ☐ PPTX

☐ Report bursting ⓘ

☐ Export filters as last page ⓘ

Hide tabs

☒ Hide tab title pages

Format

☒ PDF ☐ PPTX

☐ Report bursting ⓘ

☐ Export filters as last page ⓘ

Hide tabs

Overview

Search...

Clear selected

☒ Overview

☐ Capacity vs. Demand by OBS

☐ Over/Under Allocation by Resource Manager

Key Features – Reports

- New toggle to not send emails for empty reports
- When scheduling a report, Share sends a notification to the bell icon, Email sends an email

Schedule Filter Export **Recipients** Email content

[Add groups](#)
[Add people](#)
[Add email](#)

☒ Share
 ☒ Email
 ☐ CC
 ☐ BCC
 ☐ Notify on completion
 ☐ Notify on failure
 [Delete](#)

 Wang, Lulu lulu.wang@regoconsulting.com	☒	☒	☐	☐	☐	☐	
--	-------------------------------------	-------------------------------------	--------------------------	--------------------------	--------------------------	--------------------------	---

- Empty report still get saved to report library

Attachments

☒ Report as attachment
 ☐ Add Reports Library link

☒ Do not send emails for empty reports

Key Features – Reports

- Set up Purge Reports job to make sure the report library doesn't get overloaded over time
- Note that this doesn't delete the reports themselves
 - Purge by file format (CSV, PDF, PPTX)
 - Purge by report name
 - Purge by report run date

Job Type: Purge Reports - Job Properties

General

☒ JOB NAME

Purge Reports

Parameters

☒ FORMAT

ALL

CSV

PDF

PPTX

REPORT

FROM RUN DATE

☒ Specific Date 

☐ Relative Date [-- Select --]

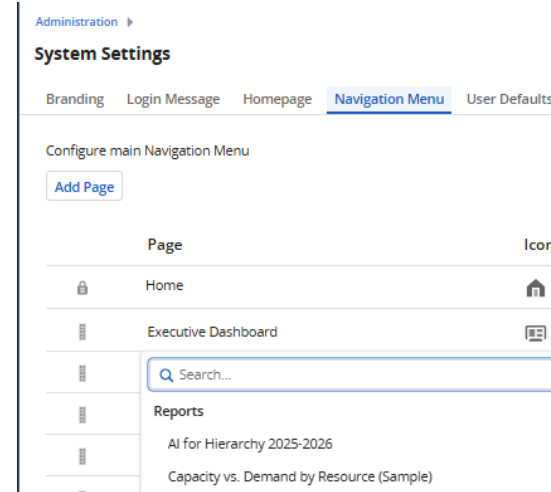
TO RUN DATE

☒ Specific Date 

☐ Relative Date [-- Select --]

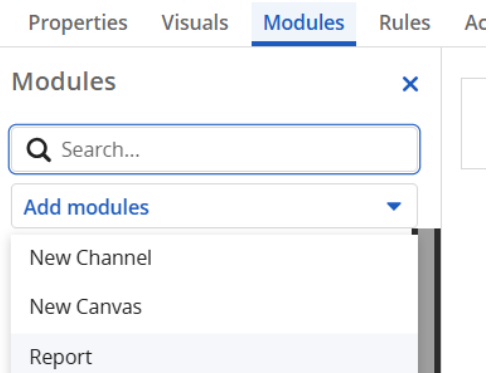
Key Features – Reports

- Add active published reports as Menu Item

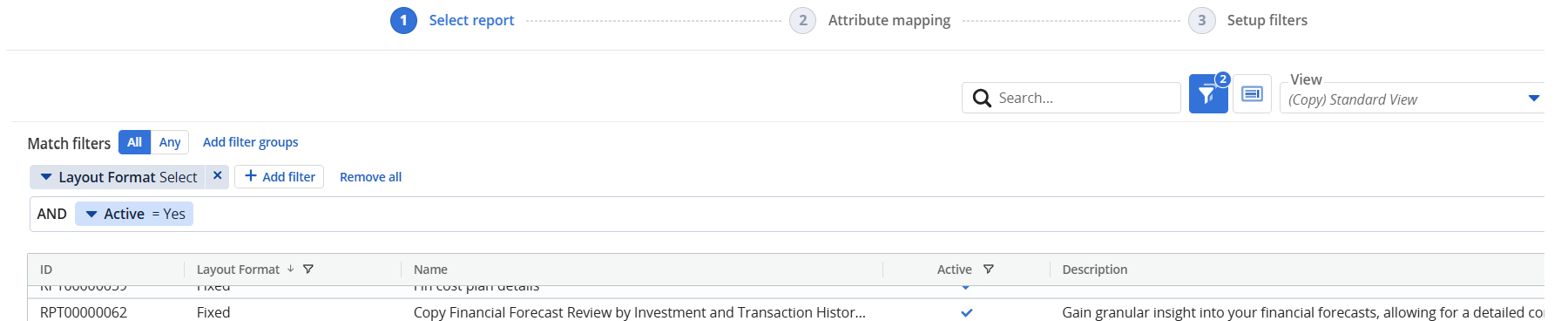


- Embed active published reports to a blueprint with parameter(s) (page, project etc.)

Project - New Reporting - EDIT MODE



Configure KPI Report



Migrate Data providers and Reports

Introduction

- Use Import/Export to migrate, share, or back up Data Providers or Reports
- Specify unique migration key
- Includes drill-down, sub-reports, or images
- Starting 16.4.1, migration would create new, or update existing data provider or reports
- Beta on 16.4.2, enable via Administration > Actions:

Action *	Type * ↑	▽	Enabled	Description
Export Beta	Data Provider	✓	✓	Allows Export for the object in the 'Type' field. Requires the Migration Key to be populated in order to export.
Import Beta	Data Provider	✓	✓	Allows Import for the object in the 'Type' field.
Export Beta	Report	✓	✓	Allows Export for the object in the 'Type' field. Requires the Migration Key to be populated in order to export.
Import Beta	Report	✓	✓	Allows Import for the object in the 'Type' field.

Starting 16.4.1, migration would create new, or update existing data provider in target environment

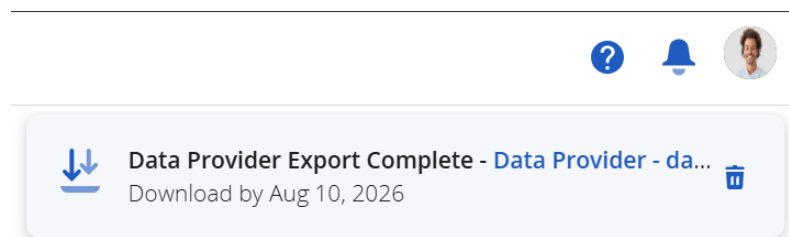
Migration - Data Provider

- Add a migration key to migrate data providers across environments of the same version (DEV/TEST/PROD etc.)

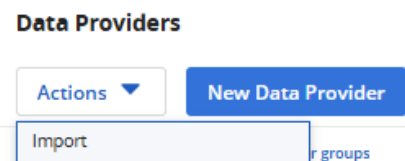
Select all Deselect all 1 Item selected Edit Copy Delete Export

Group by	
Name *	Migration Key
☒ Rego Tasks	1111

- Once export completes, it'd show up as a notification in the bell icon. Click to download the zip package

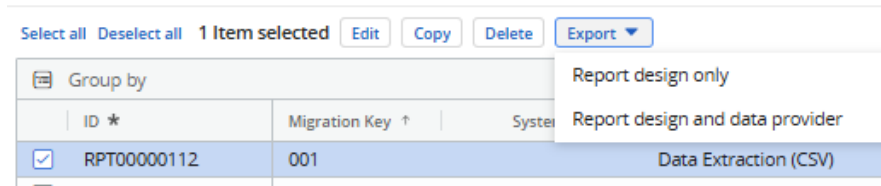


- In the target environment, click Actions > Import and select the zip package.

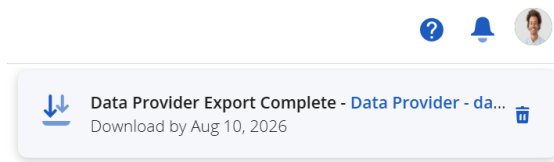


Migration – Report Designer

- Add a migration key to migrate reports across environments of the same Clarity version (DEV/TEST/PROD etc.)
 - Option to export both the Report designer and data provider in one package
 - Make sure each data provider and report have a unique migration key

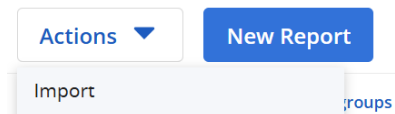


- Once export completes, it'd show up as a notification in the bell icon. Click to download the zip package



- In the target environment, click Actions > Import and select the zip package.

Report Designer



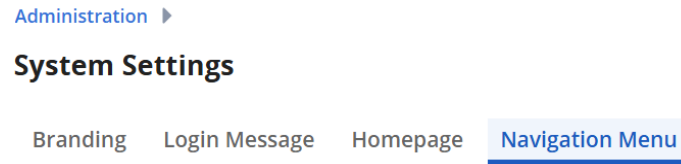
Embed Reports

Embed Reports

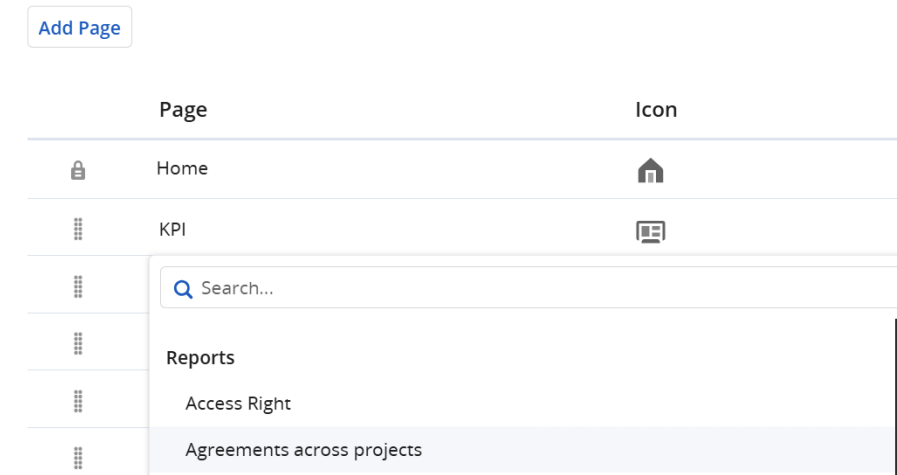
- Reports can be embedded as:
 - A Navigation Menu icon
 - A Page
 - A subtab within a blueprint, e.g. a project subtab
- The report needs to be Active and Published
- It supports embedding of any layout format:
 - Fixed
 - Responsive
 - Data Extraction (CSV)
 - Table (XLSX)

Navigation Menu Icon

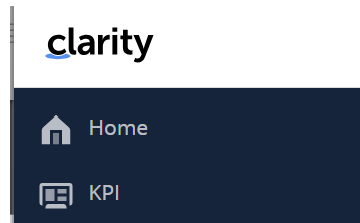
- To embed a report as a navigation menu icon, navigate to Administration > System Settings > Navigation Menu



- Add a page, and scroll to the Reports section, and select a report from the dropdown



- Report will show up on the left navigation menu



Embed as Page

- To embed an active published report as a page, navigate to Administration > Blueprints > Create or modify a blueprint with Type = Page

	Name *	Type *
☐	Page - New Reporting	Page

- Click into the blueprint, add a new Report Module

Properties **Modules** Rules

Modules ×

Add modules ▼

- New Channel
- New Canvas
- Report**

Embed as Page

- Follow the steps to configure the report



- Select an Active Published report

Match filters **All** Any Add filter groups

+ Add filter Remove all

AND ▼ Active = Yes

Active ▼	Starred	Name
✓		SnL - PMO Dashboard

- Skip Attribute mapping, and configure filters as needed

SnL - PMO Dashboard

Match filters **All** Any Add filter groups

▼ Goal (Investment) Select ✕ + Add filter

Is Equal To ▼

🔍 Search...

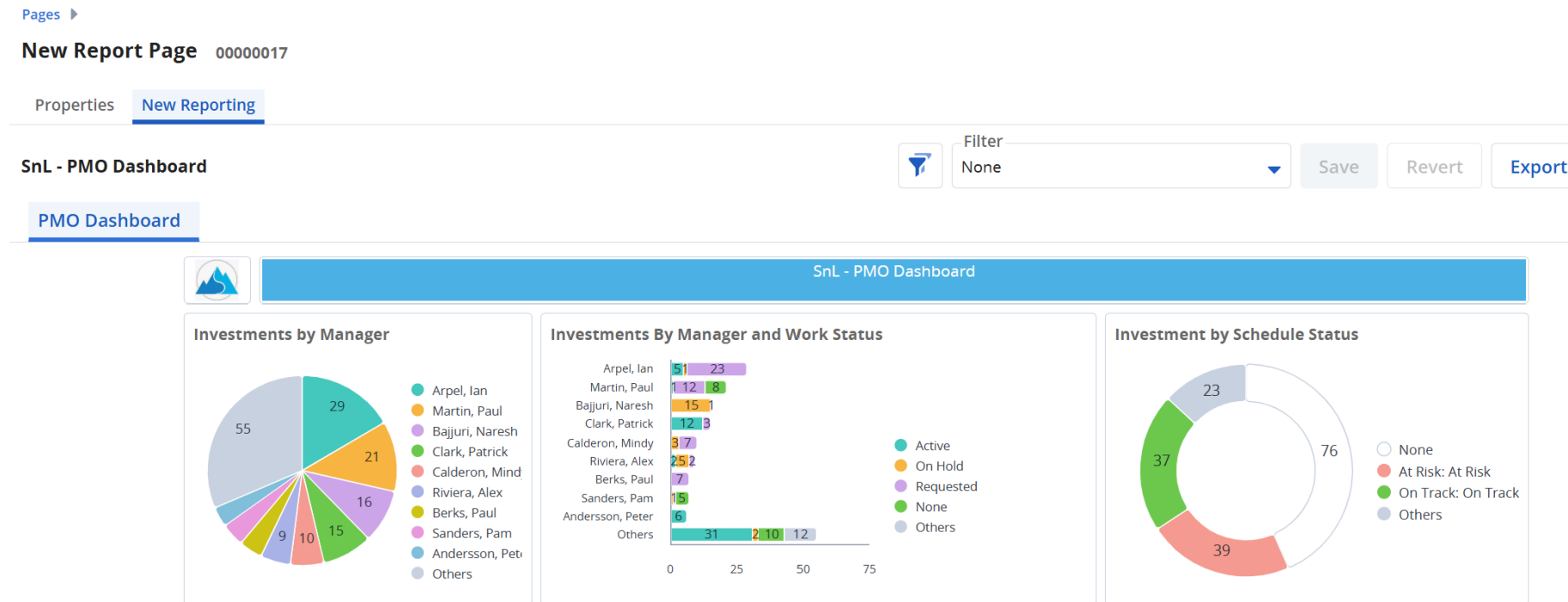
☐ Cost Avoidance

Embed as Page

- Create or modify an existing page to use the new blueprint

Name *	Blueprint
New Report Page	Page - New Reporting

- Click into the new page to view report content



Embed with Parameters

- An Active Published reports can be embedded as a subpage with Parameters
 - E.g. a Project Storyboard report can be embedded to the project blueprint, with a filter to just show content for that project
- Navigate to Administration > Blueprints > Create or modify a blueprint with Type = Project

Name *	Type *
Project - New Reporting	Project

- Click into the blueprint, add a new Report Module

Properties **Modules** Rules

Modules ×

- New Channel
- New Canvas
- Report**

Embed with Parameters

- Follow the steps to configure the report



- Select an Active Published report

Match filters **All** Any Add filter groups

+ Add filter Remove all

AND ▼ Active = Yes

Active ▼	Starred	Name
✓		SnL - PMO Dashboard

- Under attribute mapping, click Add New

Add new

Embed with Parameters

- Map attribute(s) from the report to the blueprint
- In this example, the Investment Key attribute from the Report is mapping to the Object Key on the Blueprint, which is the Project Key

Report attribute		Blueprint attribute
Investment Key ▼	→	
		Search...
		✦ Object Key

- Set up filter if needed

SnL - PMO Dashboard

Match filters **All** Any Add filter groups

▼ Goal (Investment) Select × + Add filter

Is Equal To ▼

Search...

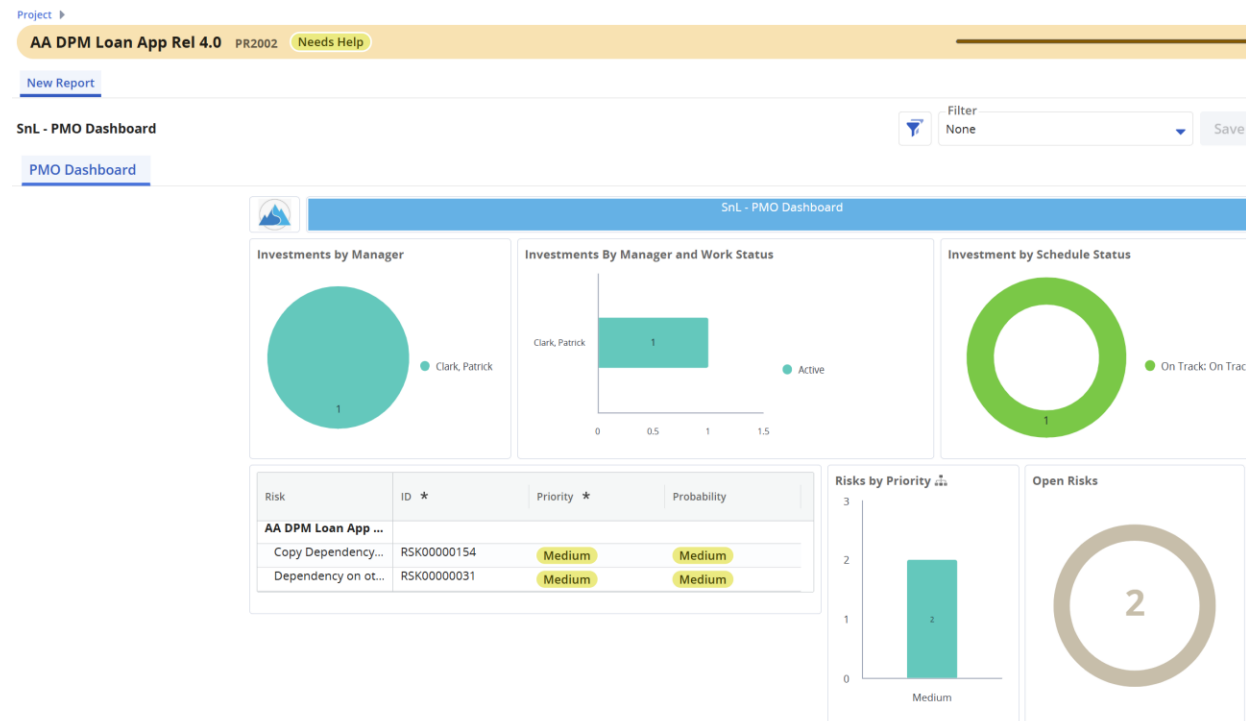
☐ Cost Avoidance

Embed with Parameters

- Create or modify an existing project to use the new blueprint

Blueprint	Project Name * ↑
Project - New Reporting	AA DPM Loan App Rel 4.0

- Click into the new page to view report content. Note the report should be filtered to just this project



Report Bursting

Report Bursting – What is it

- One report schedule to dynamic recipients with tailored content
- Example to send Project Managers their own projects
- Available in 16.4.3
- Enable in Administration > Actions > Report Bursting
- Can only burst to clarity users

Report Bursting – How to Set Up

- For a Fixed or CSV report, in Reports > Schedule > Export
- Enable Report bursting
- Select burst by attribute, e.g., Investment Manager

Schedule Filter **Export** Recipients

Format

☒ PDF ☐ PPTX

☒ Report bursting ⓘ

Burst by attribute *

Manager (Investment) ▼

- In Recipients, a smart field is available to add as recipients

Schedule Filter Export **Recipients** Email content

✦ Add Manager (Investment) Add groups Add people Add email

🔍 Search...

	☒ Share	☒ Email	☐ CC	☐ BCC	☐ Notify on completion	☐ Notify on failure	Delete
✦ Manager (Investment)	☒	☒	☐	☐	☐	☐	

Report Bursting – What Happens

- Recipients will receive the subscription via
 - A notification via bell icon if enabled for share
 - An email if enabled for email
- If enabled by scheduler, last page could include filters used for the exported file
- All export instances are saved to Reports Library

Report Filters

Run by: Wang, Lulu
Report owner: Wang, Lulu
Date: Aug 27, 2026 19:44:09

Filters

Currency: None
Unit of measure: Hours
Period: Aug 1, 2026 - Jul 31, 2027
Match filter group: All

	Attribute	Operator	Value
All	Manager (Resource)	Is Equal To	--All--
	Work Status (Investment)	Is Equal To	--All--
	Is Role (Resource)	Is Equal To	No
	Is Team (Resource)	Is Equal To	No
	Attribute	Operator	Value
All	Manager (Resource)	Is Equal To	Miller, Rosie

Available Reports

Scheduled Reports

Reports Library



Select all Deselect all

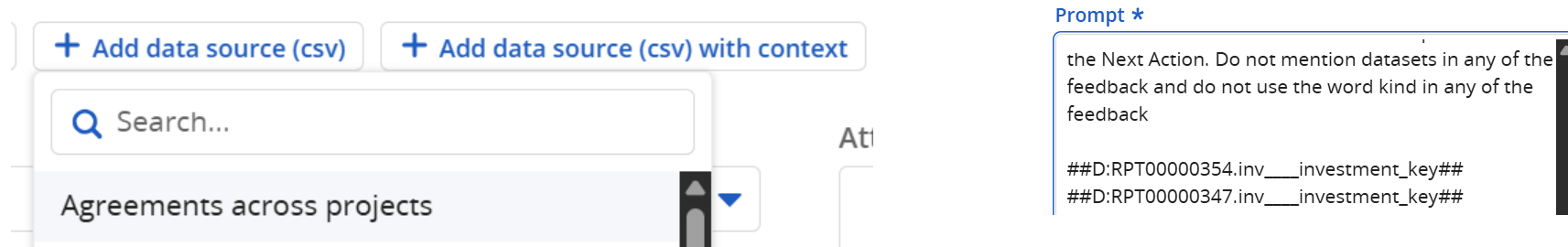
Group by	
	Name
☐	2026 RegoU - Capacity vs. Demand by Resource (Sample) - Lewis, Dana
☐	2026 RegoU - Capacity vs. Demand by Resource (Sample) - Kumar, Arun
☐	2026 RegoU - Capacity vs. Demand by Resource (Sample) - Joshi, Navdeep
☐	2026 RegoU - Capacity vs. Demand by Resource (Sample) - Iyer, Ram

Reports and VAIA



Reports and Vaia

- An active published CSV report could be used as an input in a Vaia agent Prompt



- In Report Designer, the AI Agents column reflects which agent(s) the report is used in

Name *	Layout Format	AI Agents
Status Summary Artifacts (Sample)	Data Extraction (CSV)	Generate Status Narrative in Status Report

Reports and Vaia

- Add data source (csv):
 - Pull the reports data as is, with the report's own filter, security, period setting
- Add data source (csv) with context:
 - Additionally require specifying a key attribute (e.g. Investment Key)
 - Maps the report to the specific object instance the agent is running against
 - Can dramatically reduce token usage and decrease agent response time

+ Add data source (csv)

Search...

- Agreements across pro
- Agreements across pro
- AI Schedule Data
- Assignment Costs
- Governance Rule

The 'Key Attribute' is a unique internal ID that should be used for joining the object's instance to the data source.

+ Add data source (csv) with context + Add File +

Data Source with Context Setup - Step 1 of 2

Report

Status Summary Artifacts (Sample)

Cancel Next

+ Add data source (csv) with context + Add File + A

Data Source with Context Setup - Step 2 of 2

Key Attribute

Search...

- ▶ Data Provider
- ▶ Project Status

Best Practices and Recommendations



Best Practices – Data Provider

- Standardize naming conventions – Data Providers, Reports
- In custom queries, only select fields needed instead of all
- Centralize enterprise data providers instead of individual groups creating their own
- Create new data providers for different domains or sub-objects to avoid duplicates (Investment, Risks etc.)
- Utilize Data Provider Filters for better performance
 - Join Filter
 - Pre-Filter
- JOIN on key (numeric) instead of name (character)
- Some JOIN types are can be slow (e.g., not equal to, full join)

Best Practices – Report Designer

- Standardize branding and general appearance
- Simplify the dashboards
- Start with the least access privilege
- Know your expected layout early – Responsive vs Fixed vs CSV
 - CSV extraction reports can't be converted to other types
- Add footer early if they are needed for your fixed report

Best Practices - Reports

- After a Clarity upgrade, existing reports and schedules are not modified
- Before refreshing the database, recommend to pause report schedules
- Review and reactivate schedules manually after refresh completes
- Unpublished report edits are never included in scheduled runs or migration
 - publish changes first

Learning Resources

- Broadcom Software Academy Simulation Lab – hands-on, interactive practice environment for Clarity Reporting
- Enroll in “Clarity 16.x – Reporting Essentials” for a deeper walkthrough of reporting capabilities
- Broadcom TechDocs: Working with Reporting section – Data Providers, Report Designer, Reports, Data Warehouse Schema Explorer
- Embedded enablement videos are available directly on each TechDocs reporting page

Questions?



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- Class Name = **Rego University**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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- Training classes = **Technical**
- Click on **I agree** and **Submit**



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