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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

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

Clarity Reporting Ecosystem

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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

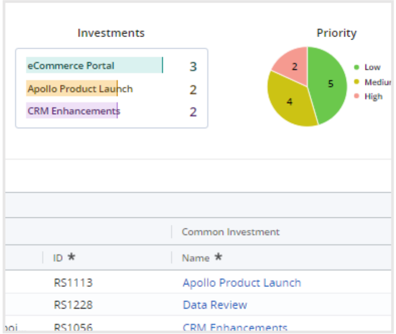
Widgets
Interactive visual components

New Reporting
Inhouse business intelligence solution

Odata
Inhouse business intelligence solution

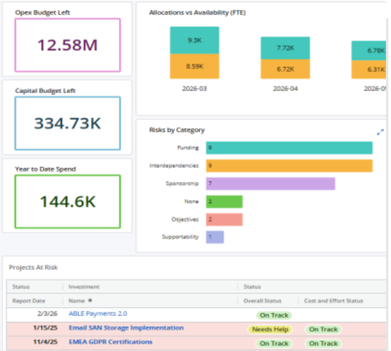
Choose Your Fighter

In UI Views and Widgets



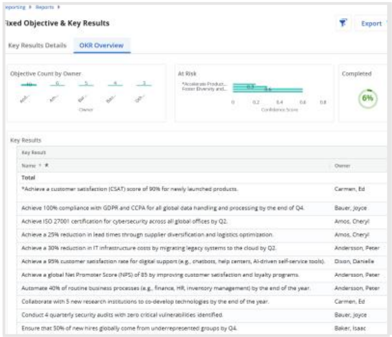
- Live Data
- Reports are operational, used day-to-day
- Can only be accessed by Clarity users
- Filter options
- End user configurable for quick changes in layout, type or conditional formatting
- No maintenance and constantly being improved by each release

Canvas



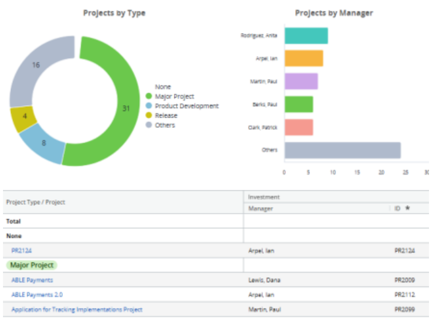
- Built on top of widgets
- Enable Objects on Blueprint for Canvas
- Can be enabled for Project/Idea/CIT/Status
- Can also be enabled for Hierarchy and Roadmap
- Can export to PDF

Portlets



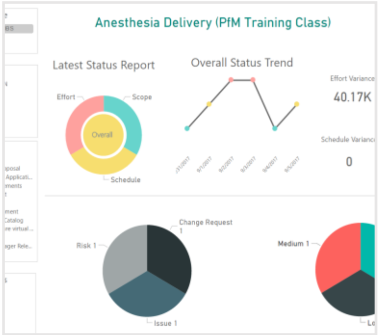
- Live Data or DWH
- Reports are operational, used day-to-day
- Can only be accessed by Clarity users
- Could be slow and impact the clarity application
- Personalization features available
- Query based portlets only available in Classic
- Export to PPT/Excel/CSV

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

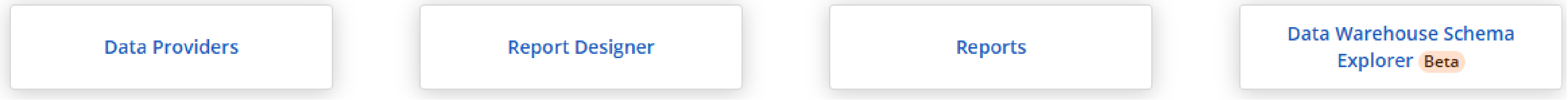
External BI Solutions



- Could connect to multiple data sources
- OData and 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

☑

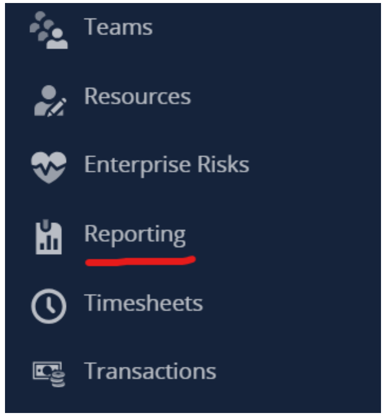
(Most updates to the data warehouse will occur in near real time when Clarity data is changed. SQL Curve tables will be updated but the Fact tables will not.)

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

Report Lifecycle

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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

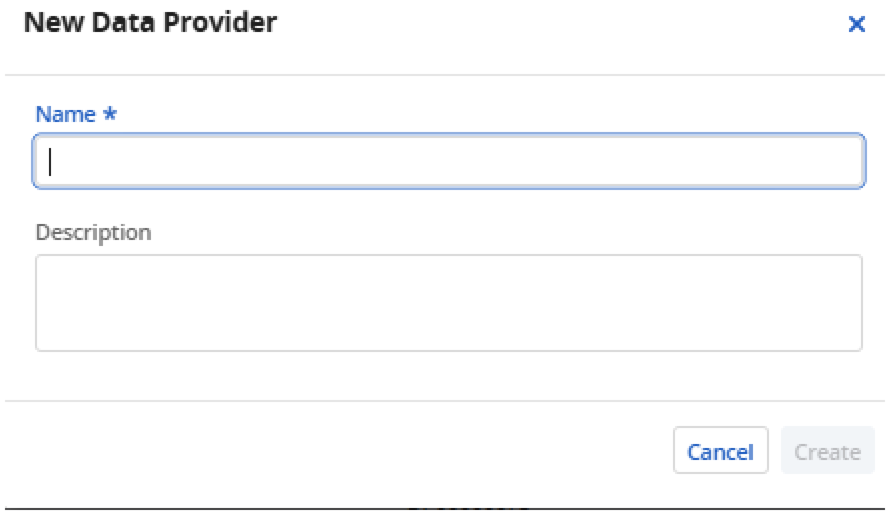
- Broadcom offers set of OOTB Data Providers to assist in getting started quickly.
- Review and copy existing OOTB Data providers that suits the need.
  - Can be identified by using the attribute System = Yes
  - Select or Right click on the record and Copy
- Adjust the copied Data Provider, typical 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

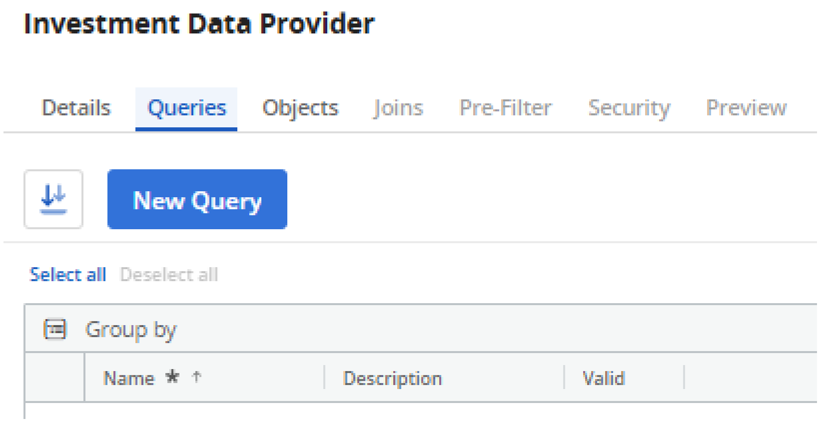
- Specify a name and description



Data Providers – Include Queries

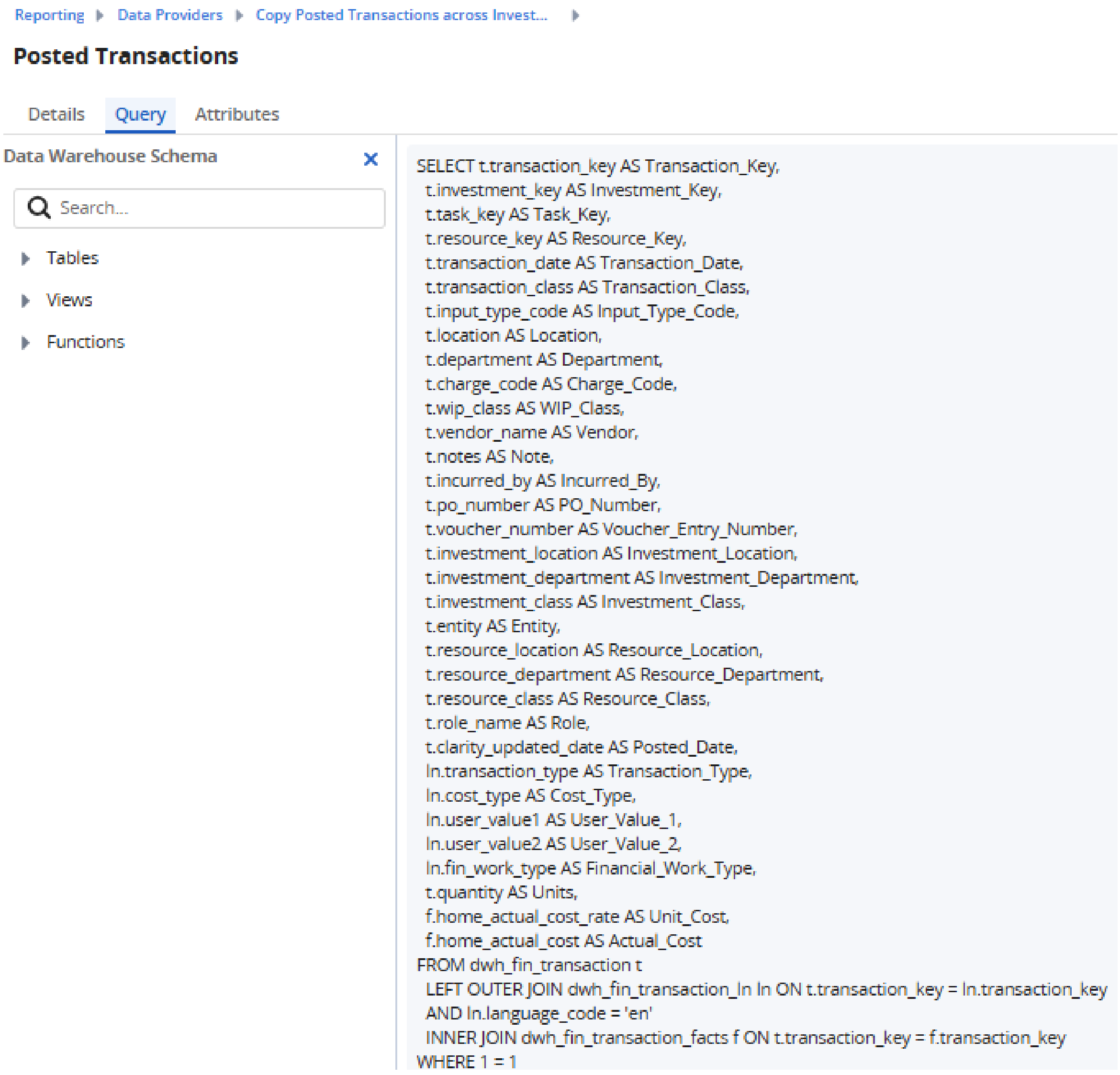
- Check “Include Queries” to create custom query if needed

- 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



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

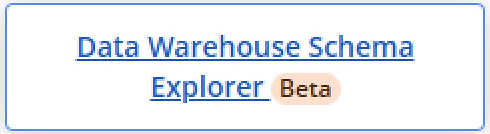
Details Query **Attributes**

Group by

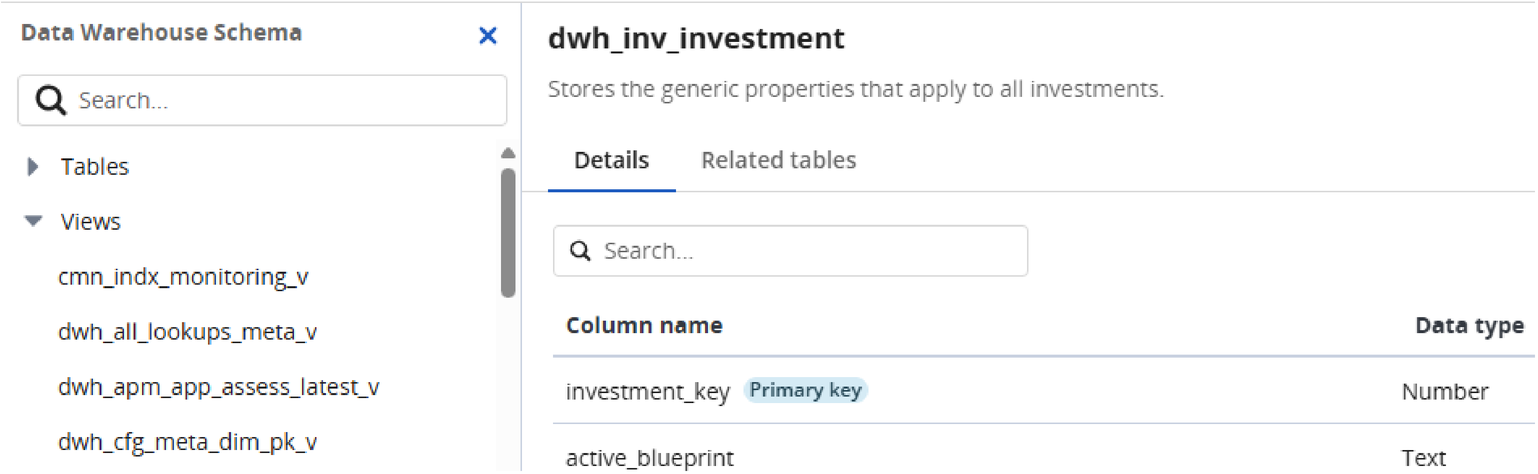
Attribute	Data Type	Key	Label	Tooltip	Associated Lookup
transaction_key	number	✓	Transaction Key		
investment_key	number	✓	Investment Key		
task_key	number	✓	Task Key		
resource_key	number	✓	Resource Key		
transaction_date	date		Transaction Date		
transaction_class	string		Transaction Class		

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

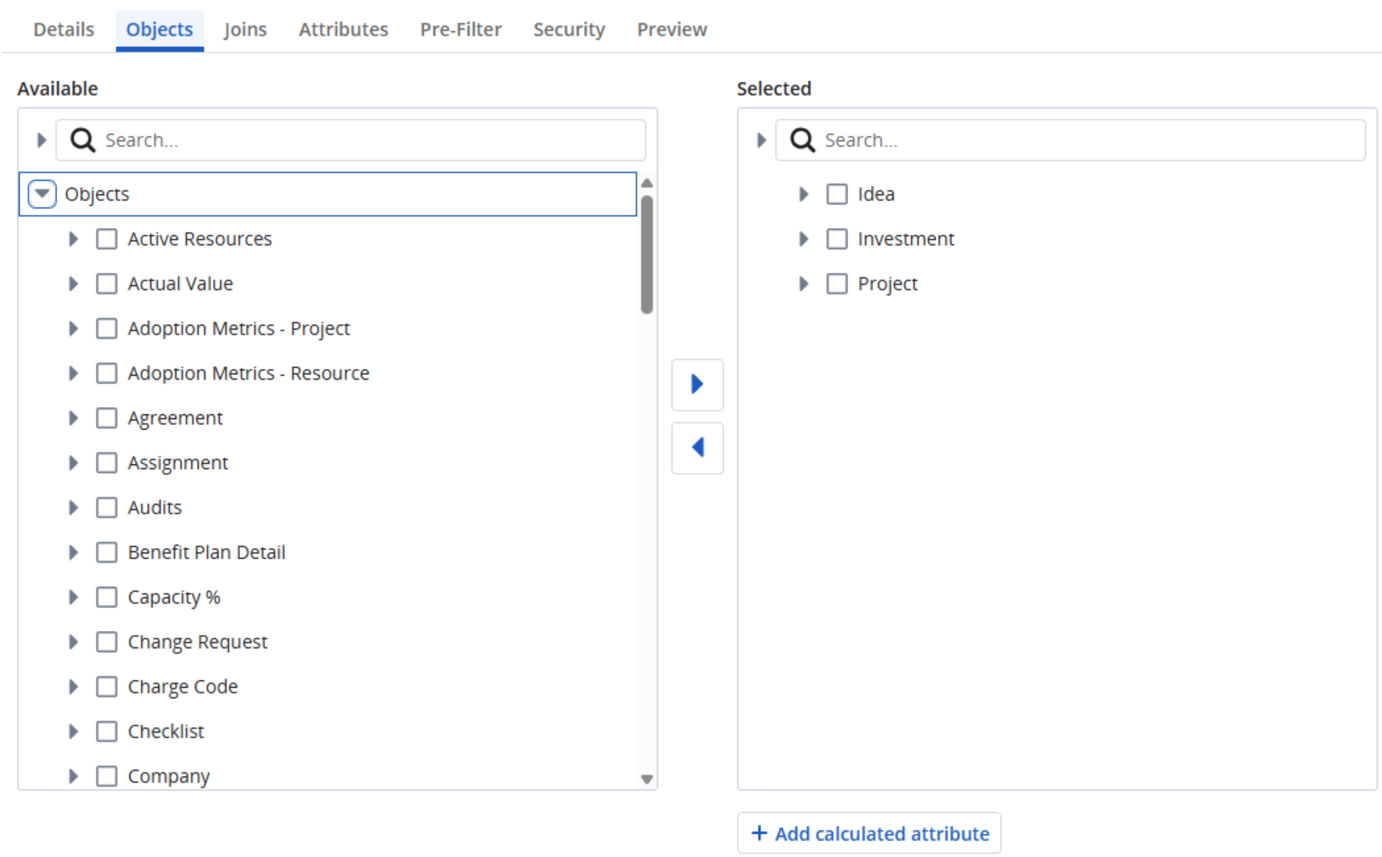


- Preview available Tables, Views, and Functions. Confirm column data type and related tables



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

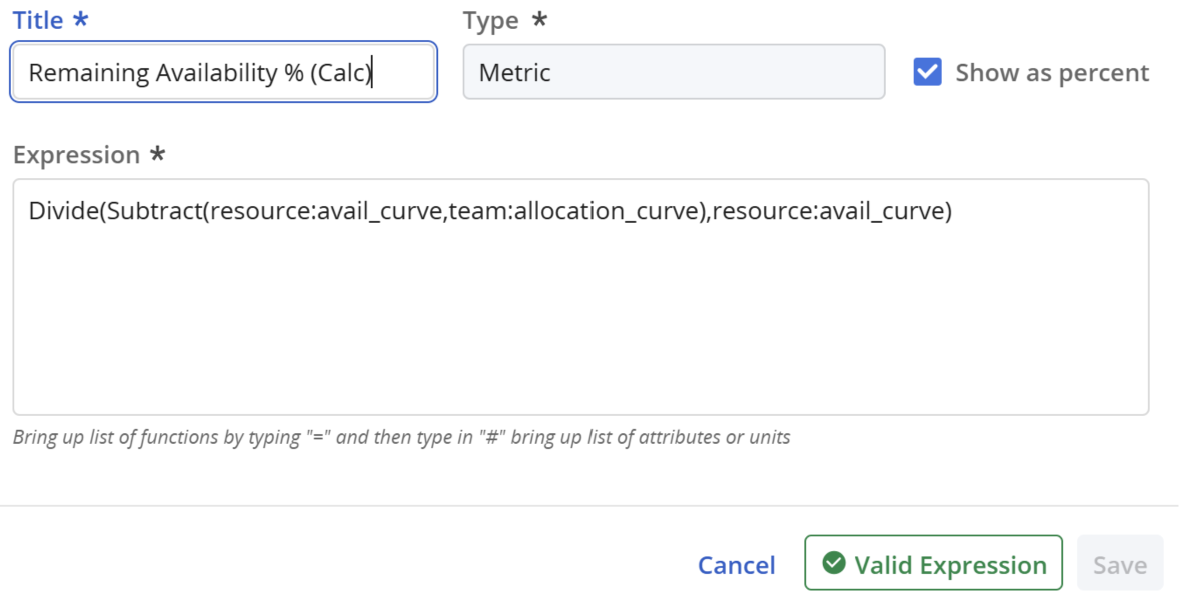


Data Providers – Attribute Types

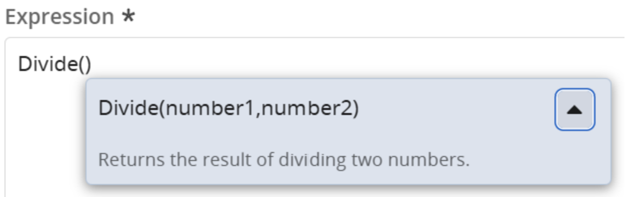
- Below are the available attribute types:
  - Boolean – Yes/No
    - e.g., Is Active, Is Template
  - Number – numeric field that can be aggregated on #
    - e.g., Days Late
  - Date – typically data fields from a calendar dropdown
    - E.g., Schedule Start, Schedule Finish
  - Text – typically text 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.

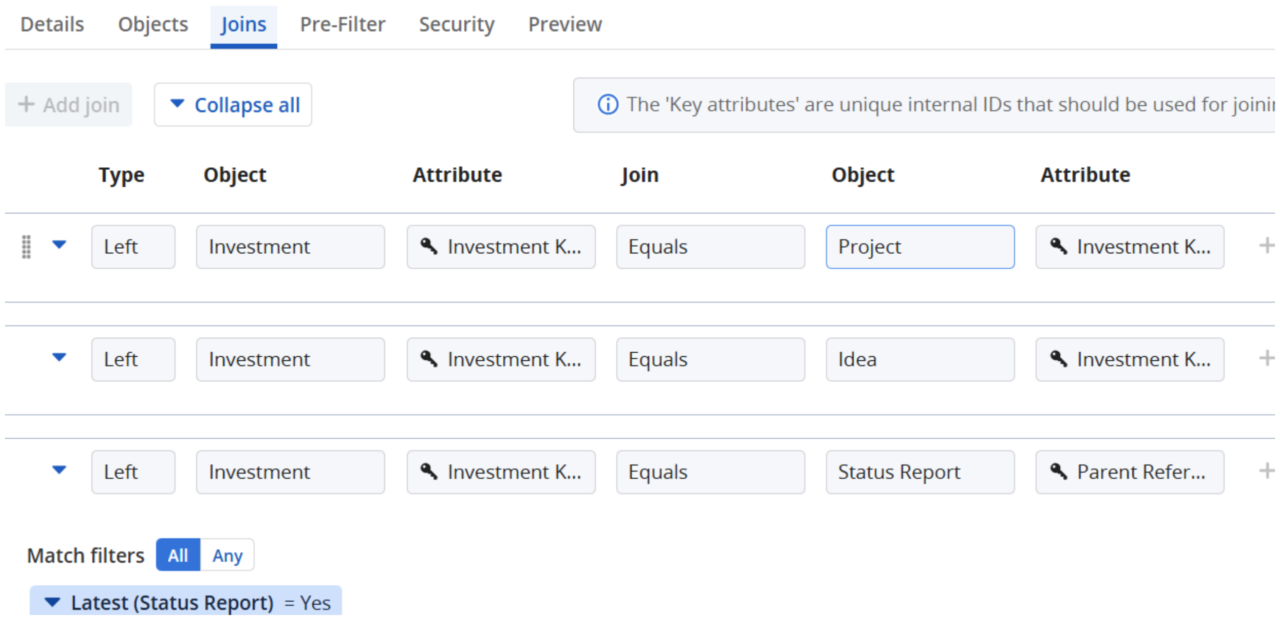


- Use the tooltip to understand provided functions and how to use them

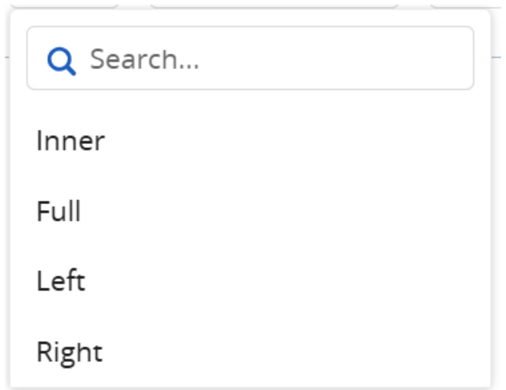


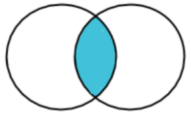
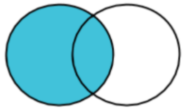
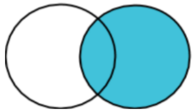
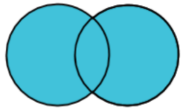
Data Providers – Joins

- 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



Data Providers – Joins

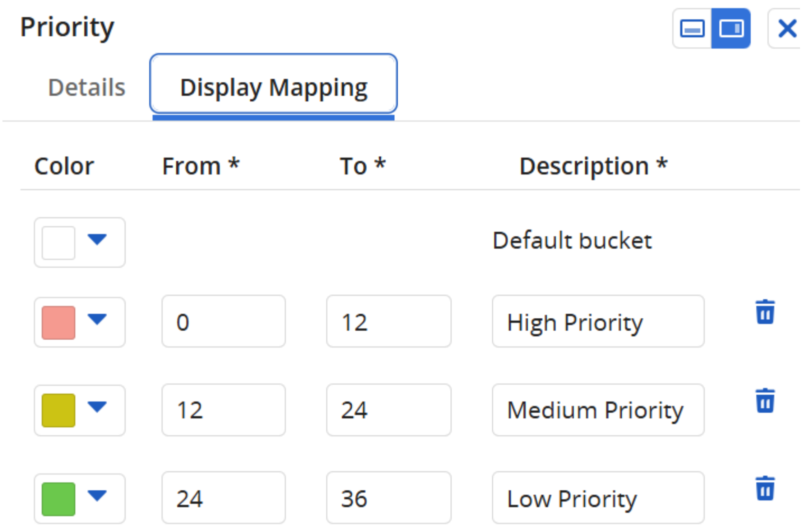


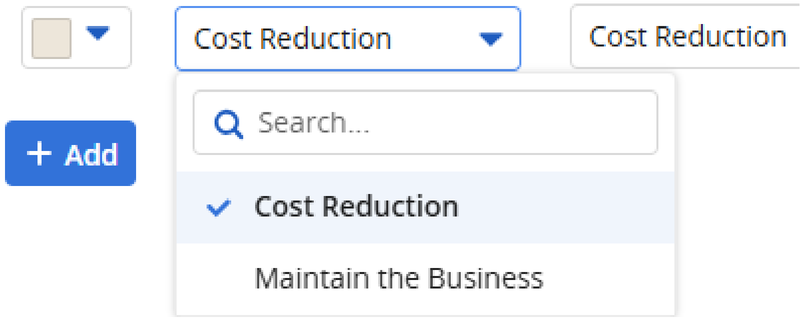
- Inner join 
  - Returns only rows that match in both tables
- Left join 
  - Returns all rows from the left table, plus matches from the right (nulls if none).
- Right join 
  - Returns all rows from the right table, plus matches from the left (nulls if none).
- Full join 
  - Returns all rows from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

Data Providers – Attributes Display Mapping

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

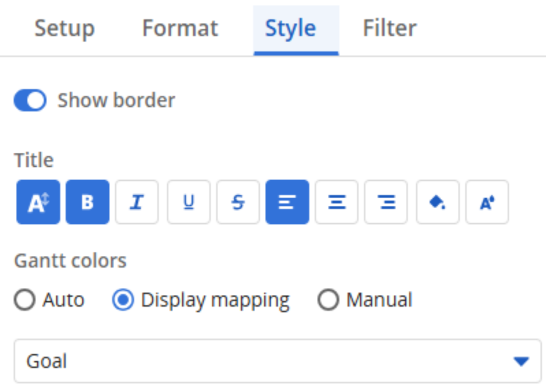
- Under Display Mapping, assign specific color to a range, or specific lookup values

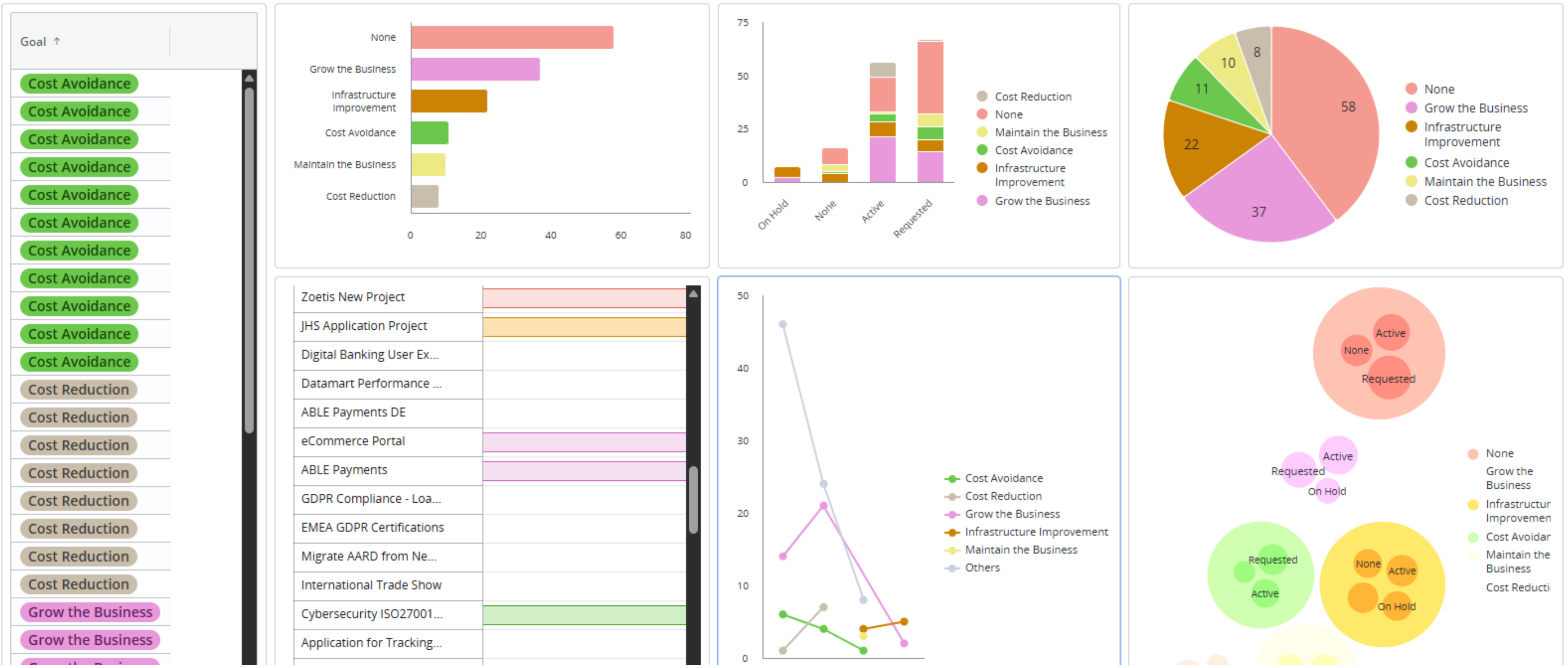




Data Providers – Attributes Display Mapping

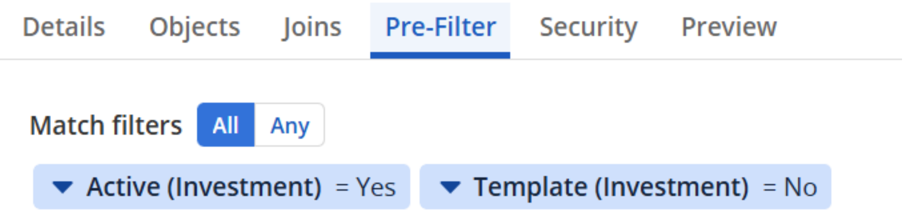
- For widget types below, under Style > Color, select Display Mapping
  - Table
  - Bar Chart
  - Pie Chart
  - Gantt Chart
  - Line Chart
  - Split Bubble Chart



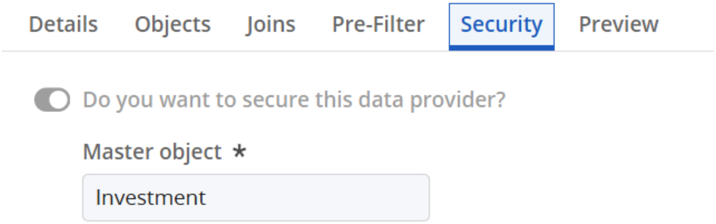


Data Providers – Filters, Security

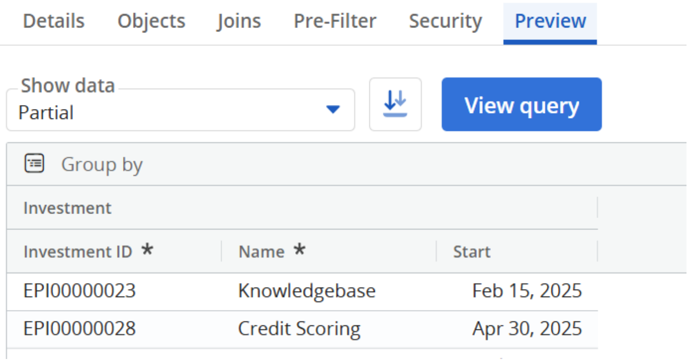
- Refine Filters



- Enable/Disable Security



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



- Publish

Report Designer

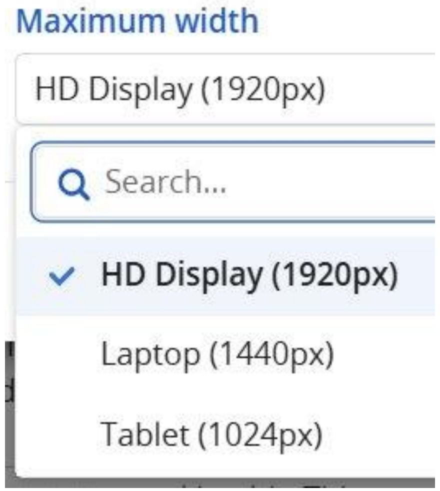
Report Designer

- 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

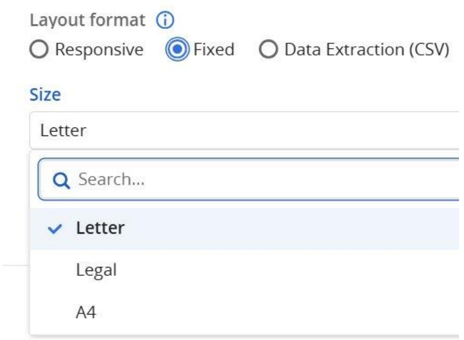
- **Responsive**
  - Interactive and filter-responsive
  - Designed for user exploration and on-screen analysis
  - Useful for dashboards and dynamic views
  - Maximum width selection – HD Display / Laptop / Tablet

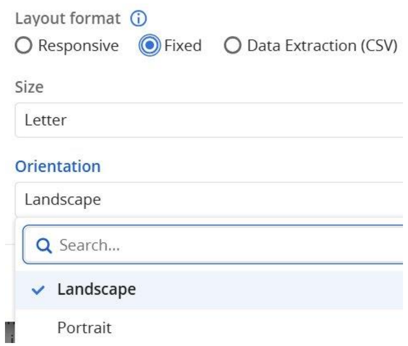


- **Tables(XLSX)**
  - Export full report, including every tab to a single Excel workbook
  - Each tab exports as its own sheet
  - New in 16.4.3

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

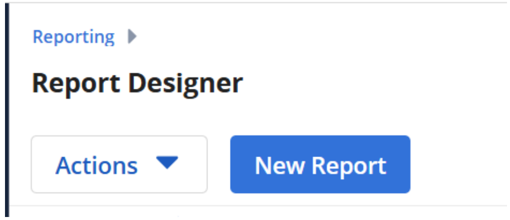




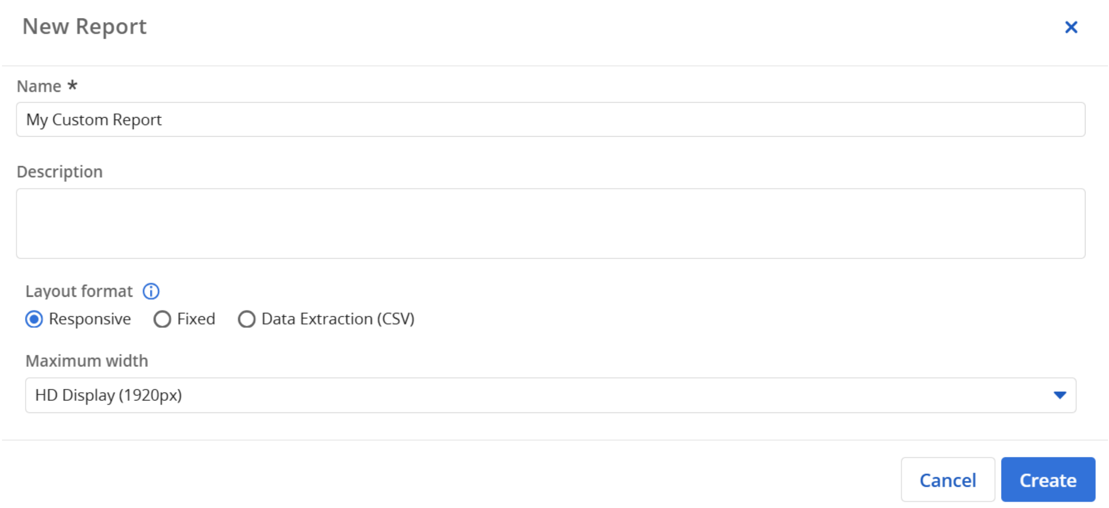
- **Data Extraction (CSV)**
  - Provides single-pane report layout with a table widget optimized for CSV export

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.

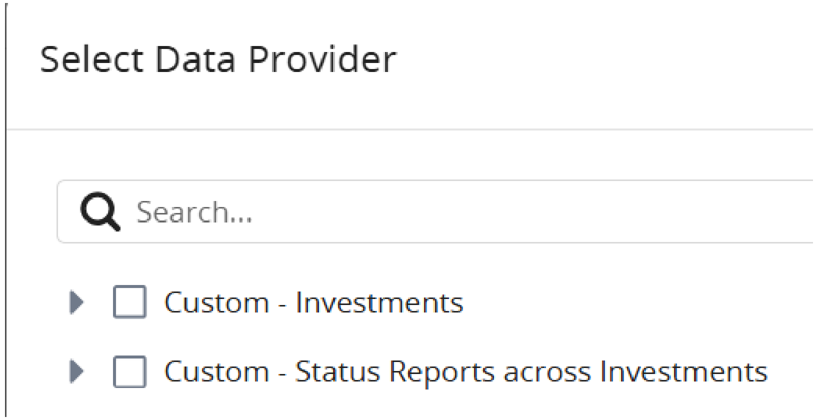


- A dialog box labeled New Report will appear.
- Enter unique name and description



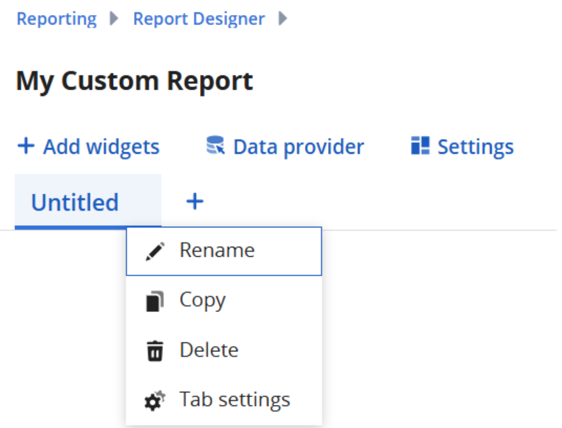
Report Designer

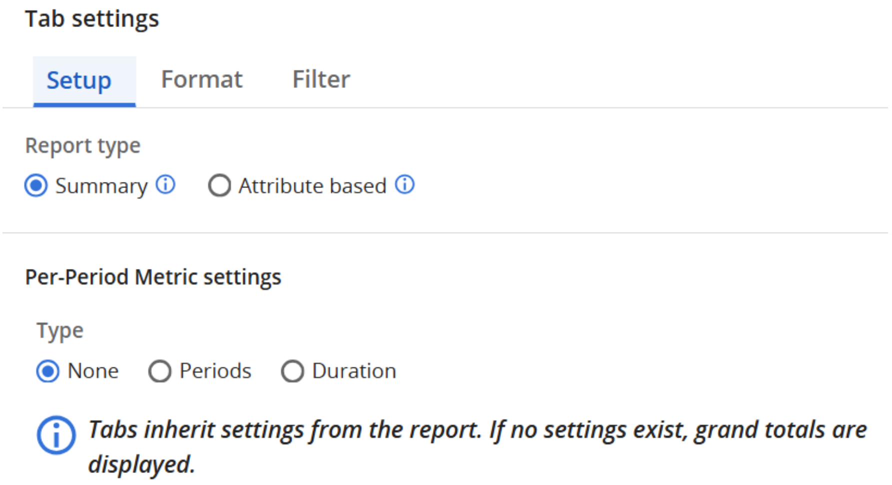
- Choose the desired layout
- Click Create to save and proceed
- Select the Data Provider from the available list and click Save
    - The report designer will not be able to use system data providers to create reports



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



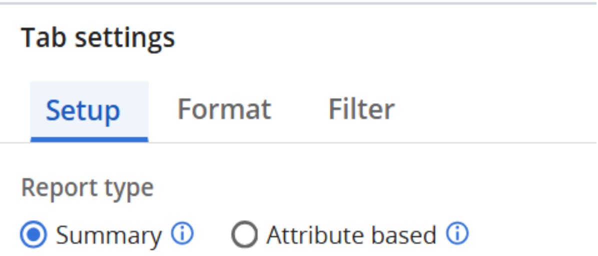


Report Designer - Filters

- 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

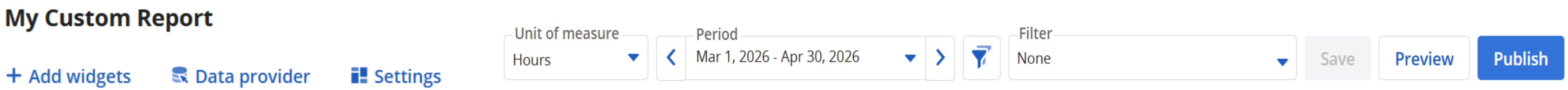
- Report Type



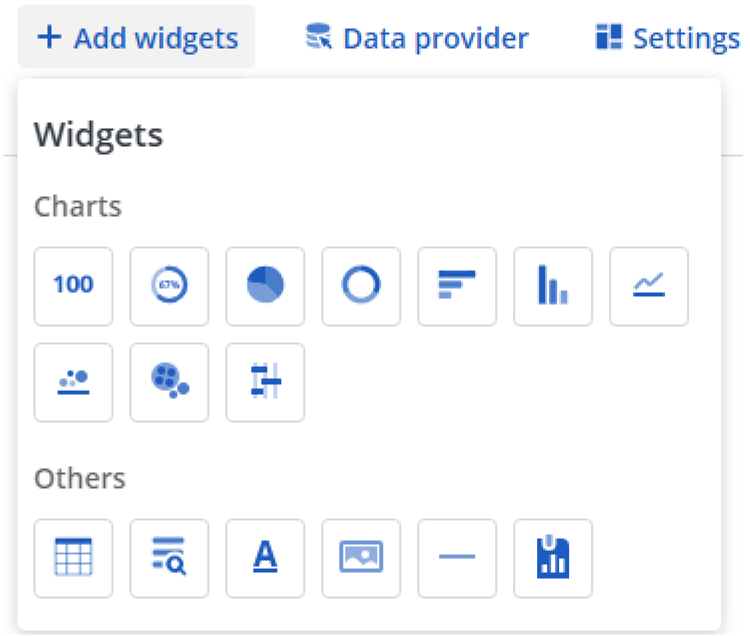
  - Summary: Gives standard report controls and displays a scrollable report based on data configured within widgets
  - Attribute based: Displays a paginated report where each page’s data is determined by the attribute added to the report

Report Designer – Widget Types

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

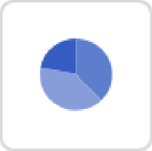
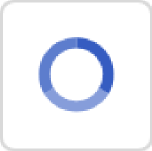


- Choose a widget from the Add widgets
  - Charts: choose from Number Tile, Progress Ring, Donut, Pie, Bar, Column, Line, Bubble, Split packed Bubble, Gantt
  - Others: Table, Attribute group, Text/Link, Image, Line, Sub-report



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. 

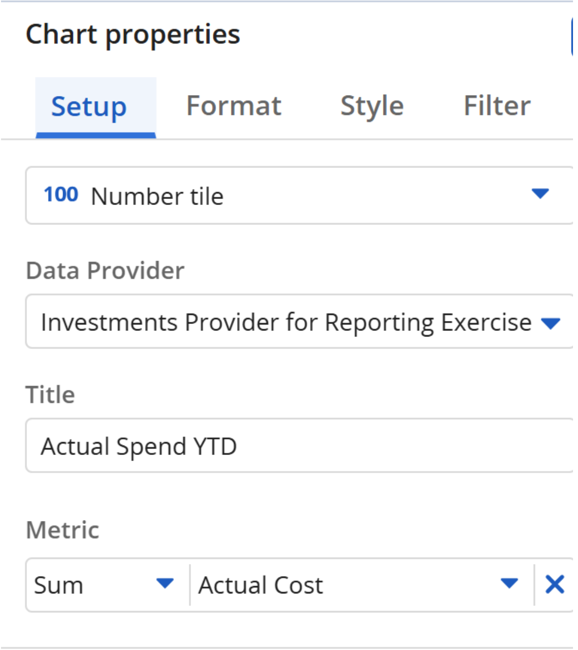
- **Progress Ring:** Show progress toward a target or percentage complete. 

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

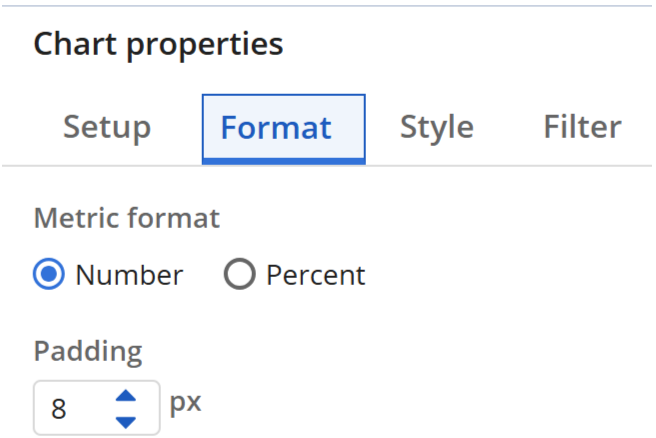
- Pick Number tile and drag and drop to the desired location on the canvas.
- For this example, we are building tile to get Actuals YTD
- On the Chart properties, pick the Data Provider and enter the Title.
- For the Metric choose Average/Count/Maximum/Minimum/Sum
- Select the metric from the list

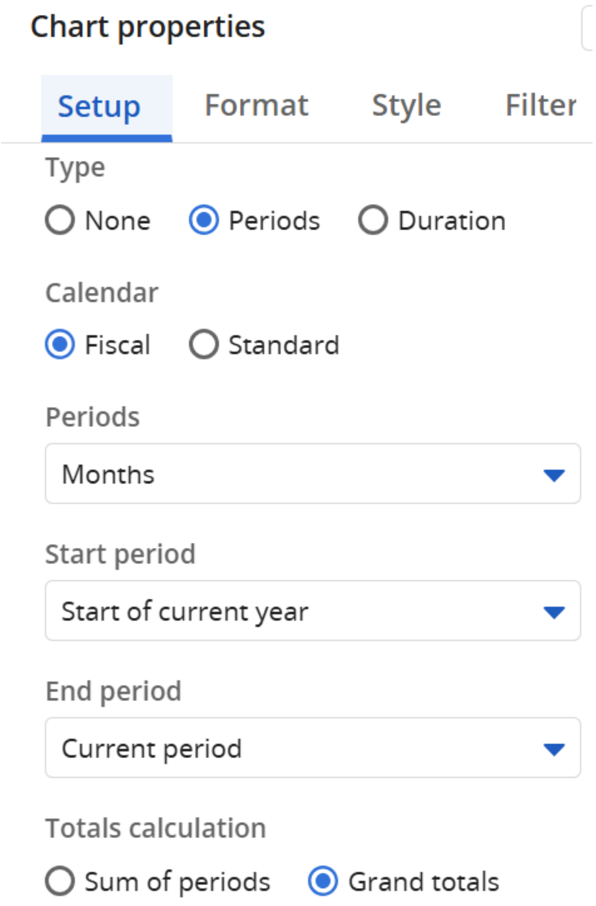


Report Designer - Number Tile

- On the Per-Period Metrics settings, pick the Type and Calendar.

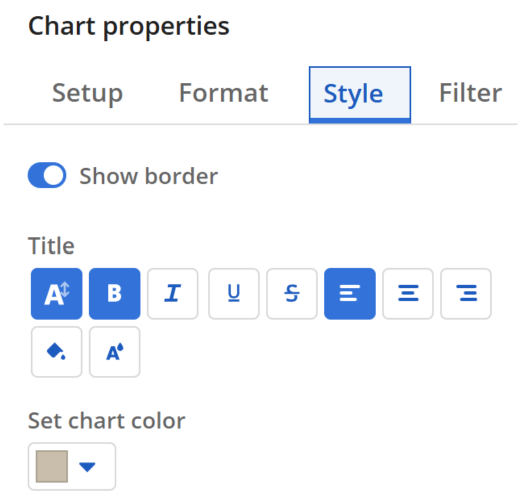
- Choose the Metric format – Number/Percent



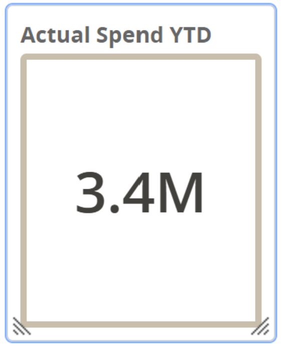


Report Designer – Number Tile

- Pick the Style for the Title – size, bold, italics, underline, strikethrough, alignment, font color and background

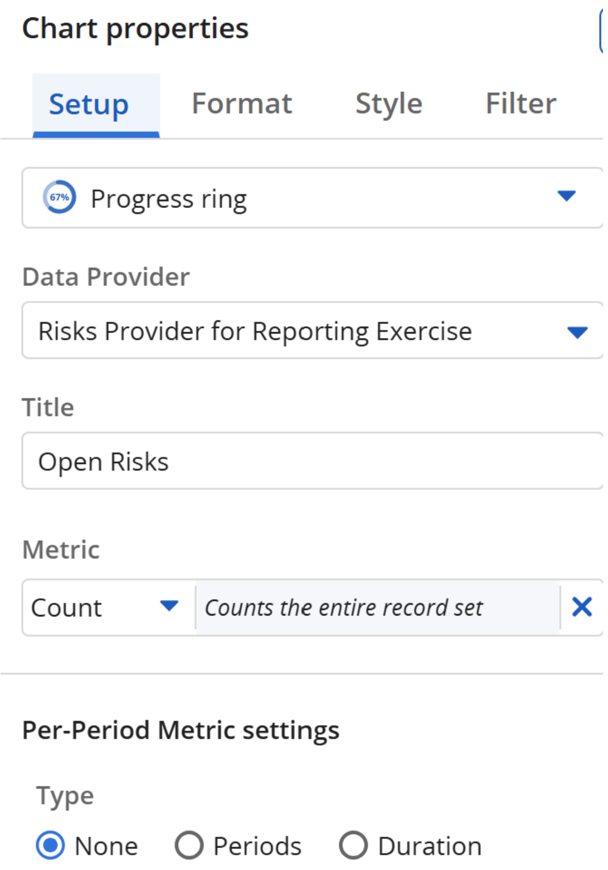


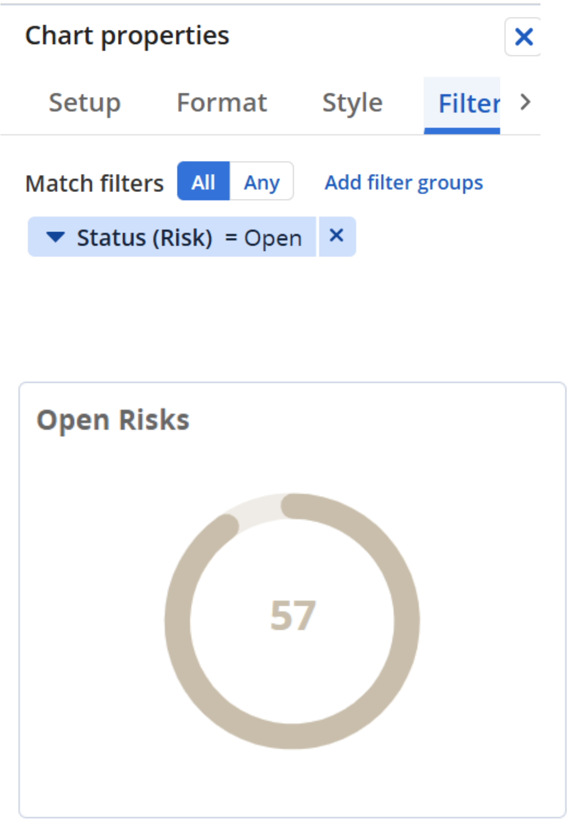
- Add any widget level filters if necessary, in the Filter tab.
- Validate the output in the Number Tile widget displayed on the canvas.



Report Designer - Progress Ring

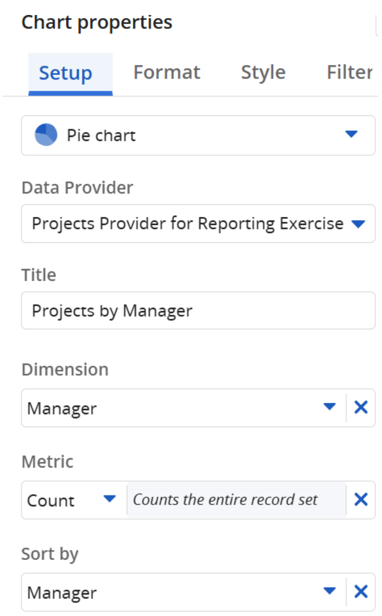
- Choose Progress Ring from the widgets list and configure the properties
  - Ex: Count of Open Risks

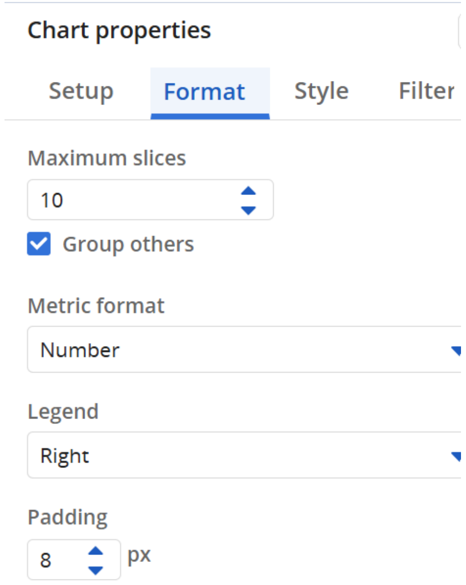


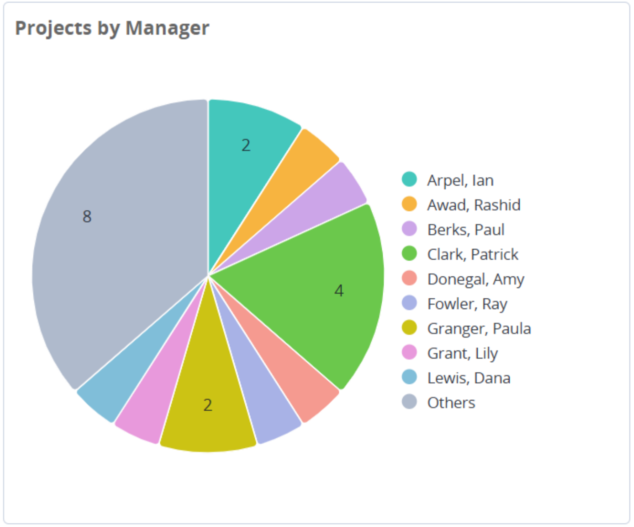


Report Designer - Pie Chart

- 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

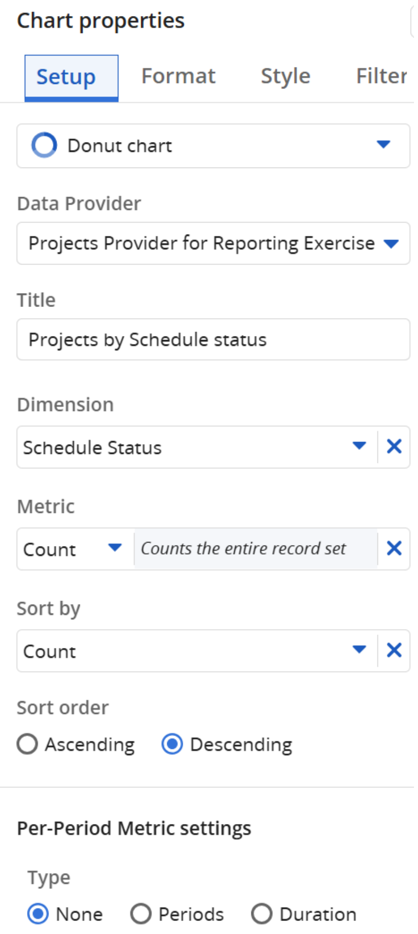


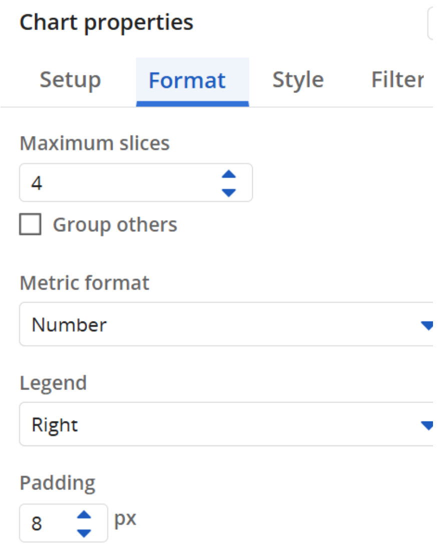




Report Designer - Donut chart

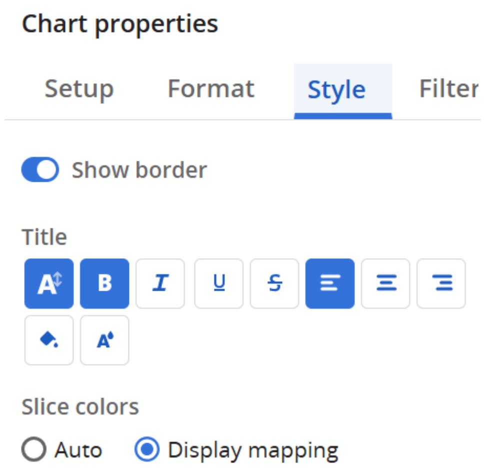
- Pick Donut chart from the Add widgets menu
  - Ex: Projects by Schedule Status

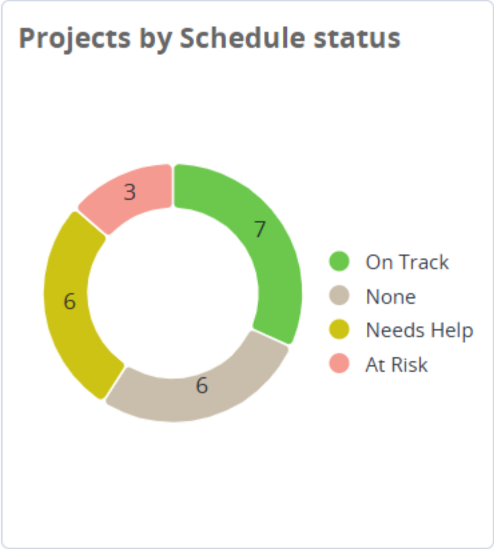




Report Designer - Donut chart

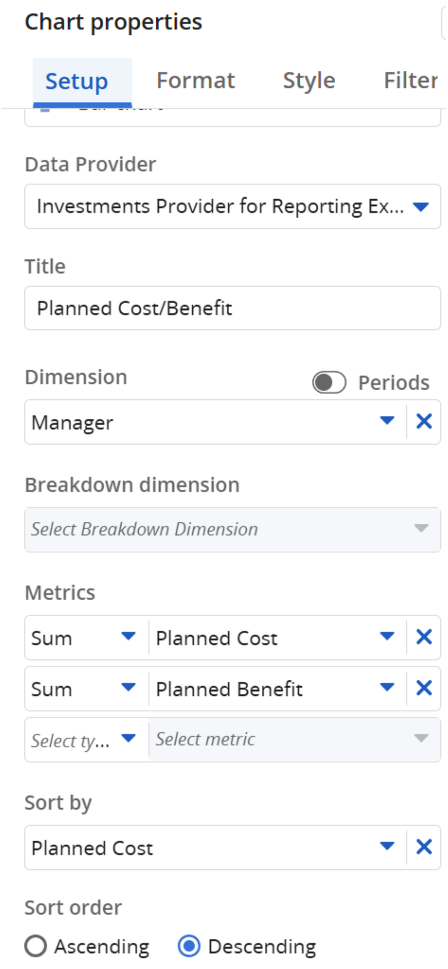
- In the Style tab, slices colors can be set.
- Choosing Display mapping here will show the colors based on the attribute's display mappings at the object level in Classic Administration -> Objects

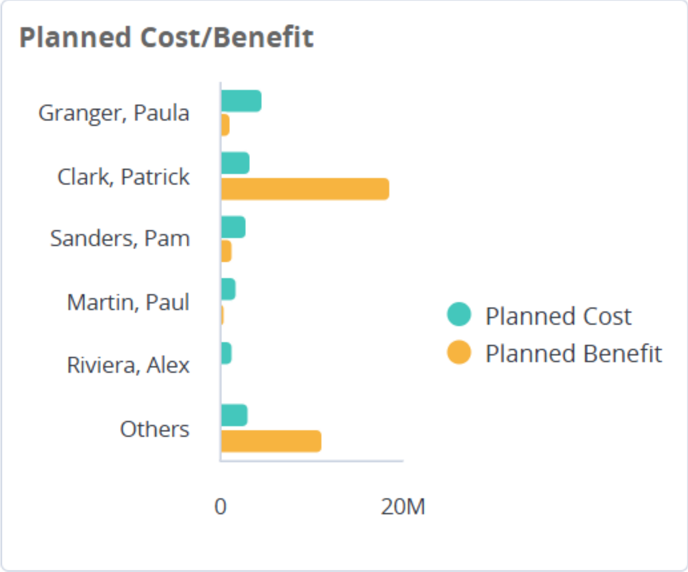




Report Designer - Bar chart

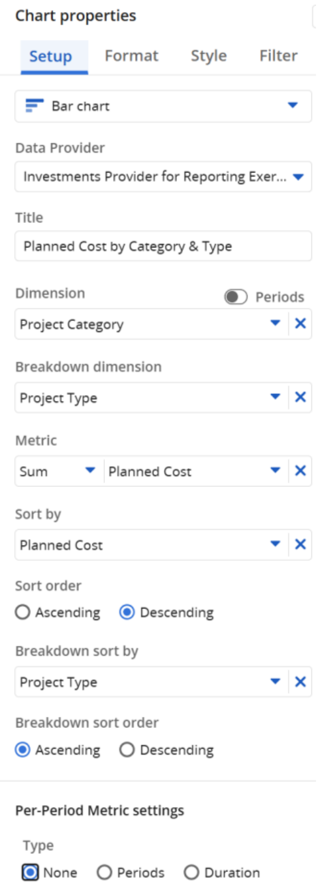
- Ex: Planned Cost/Benefit by Manager
  - In the Dimension, pick Manager

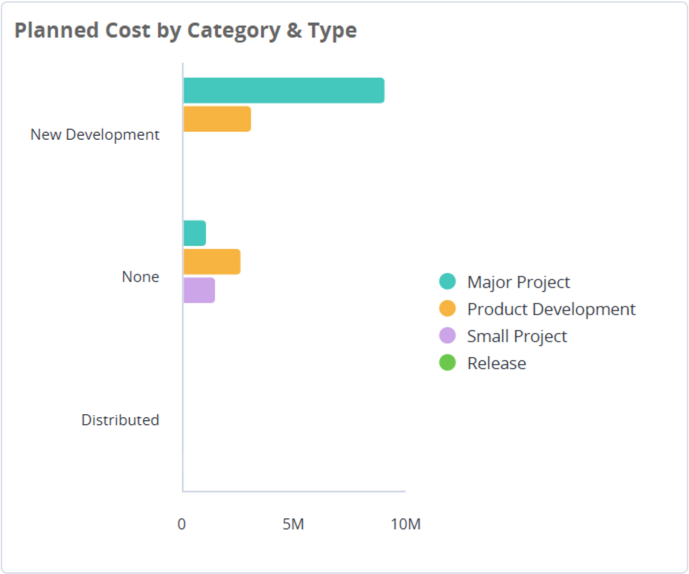




Report Designer - Bar chart

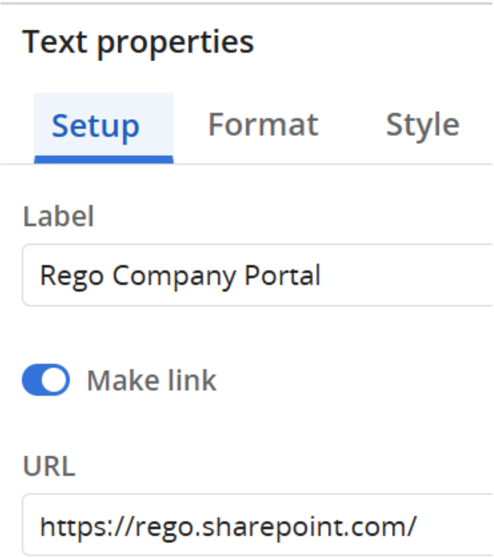
- If additional grouping is needed, select the Breakdown dimension
  - Ex: Planned cost by Category & Type





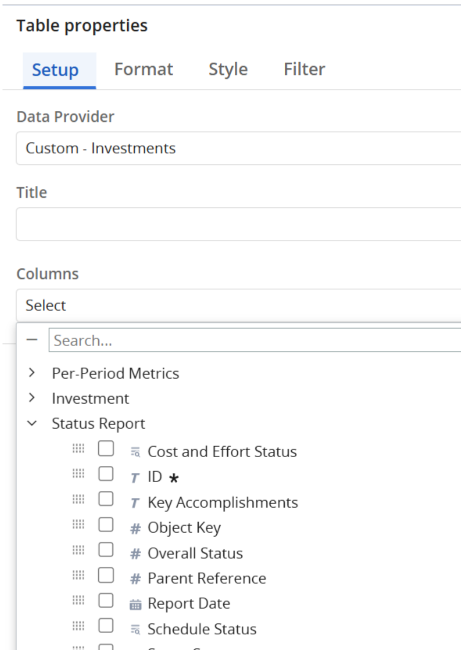
Report Designer - Text/Link

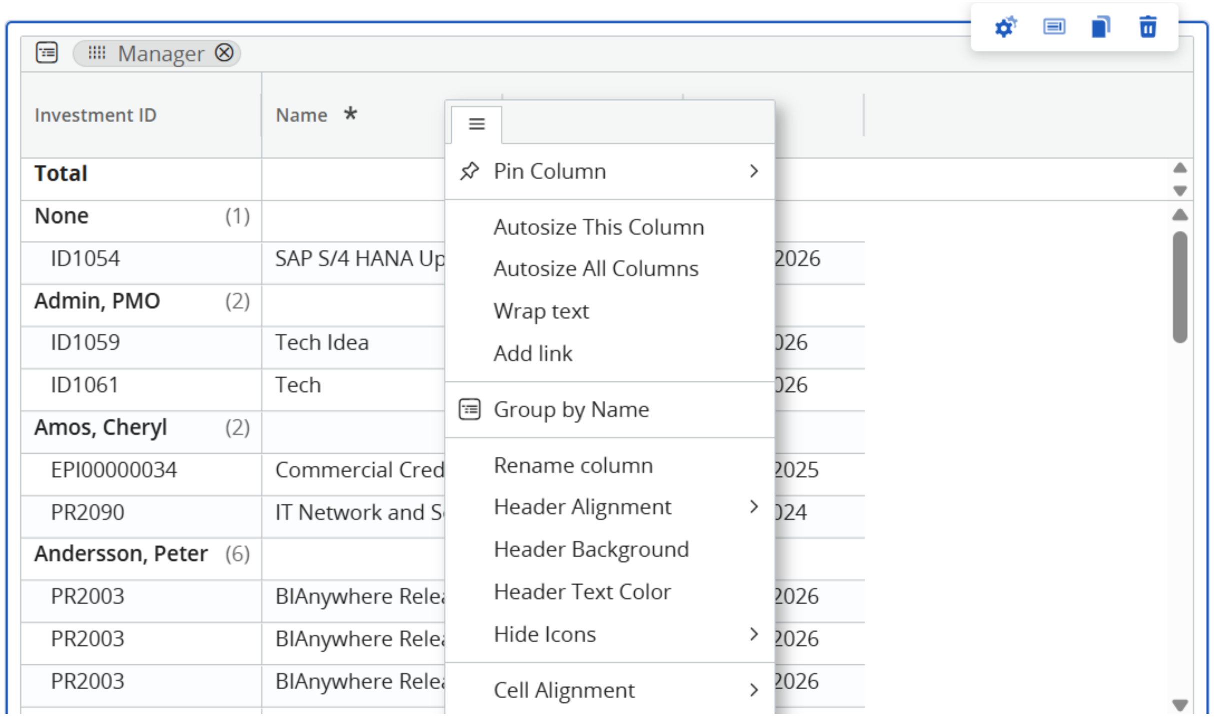
- Text/Link widget allows to enter static texts
- Optionally the text can made as hyperlinks – only static URLs supported at this point



Report Designer - Table

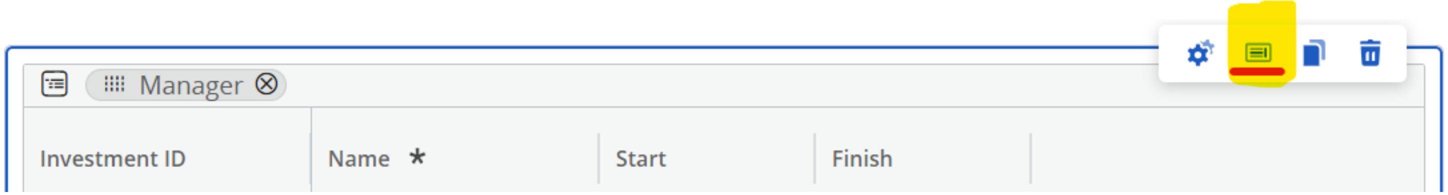
- Table widget is powerful component that can include multiple columns from any configured Data Provider.
- Allows grouping, formatting columns and displays totals.

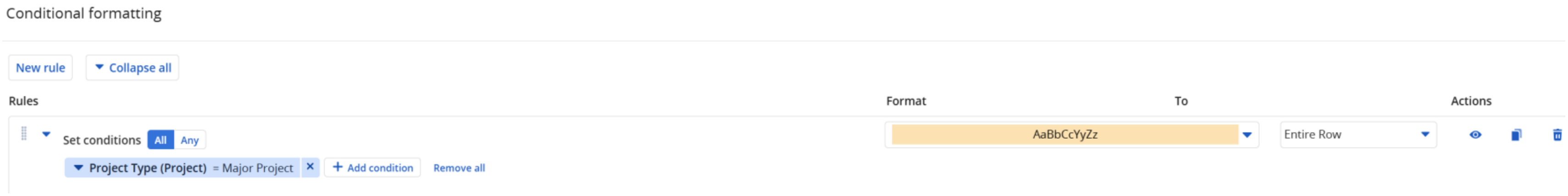




Report Designer - Table

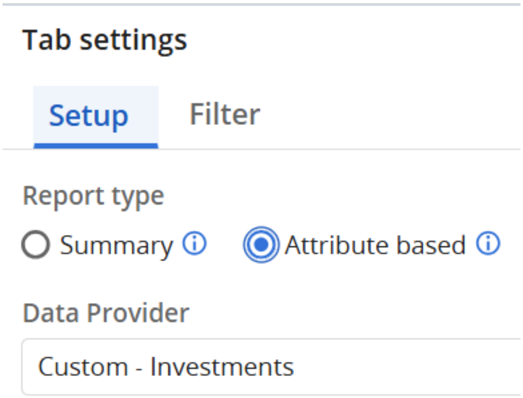
- Use the conditional formatting option on the widget for formatting entire row or column.





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.



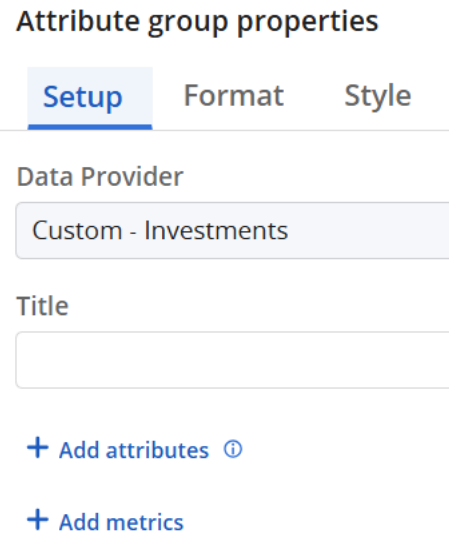
- You cannot add an Attribute Group when Report Type is set to Summary.

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.

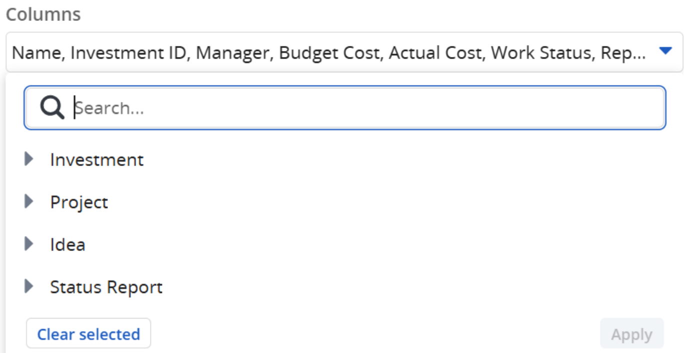
- Once you select a data provider, hover over the Attribute container to open the properties
- Use +Add attributes to select an attribute to include in container.

- Use +Add metrics to add numeric attributes



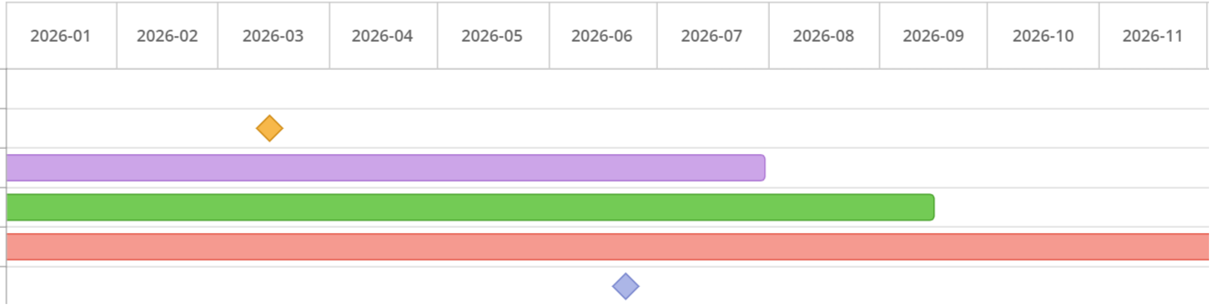
Report Designer – Gantt Chart

- 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



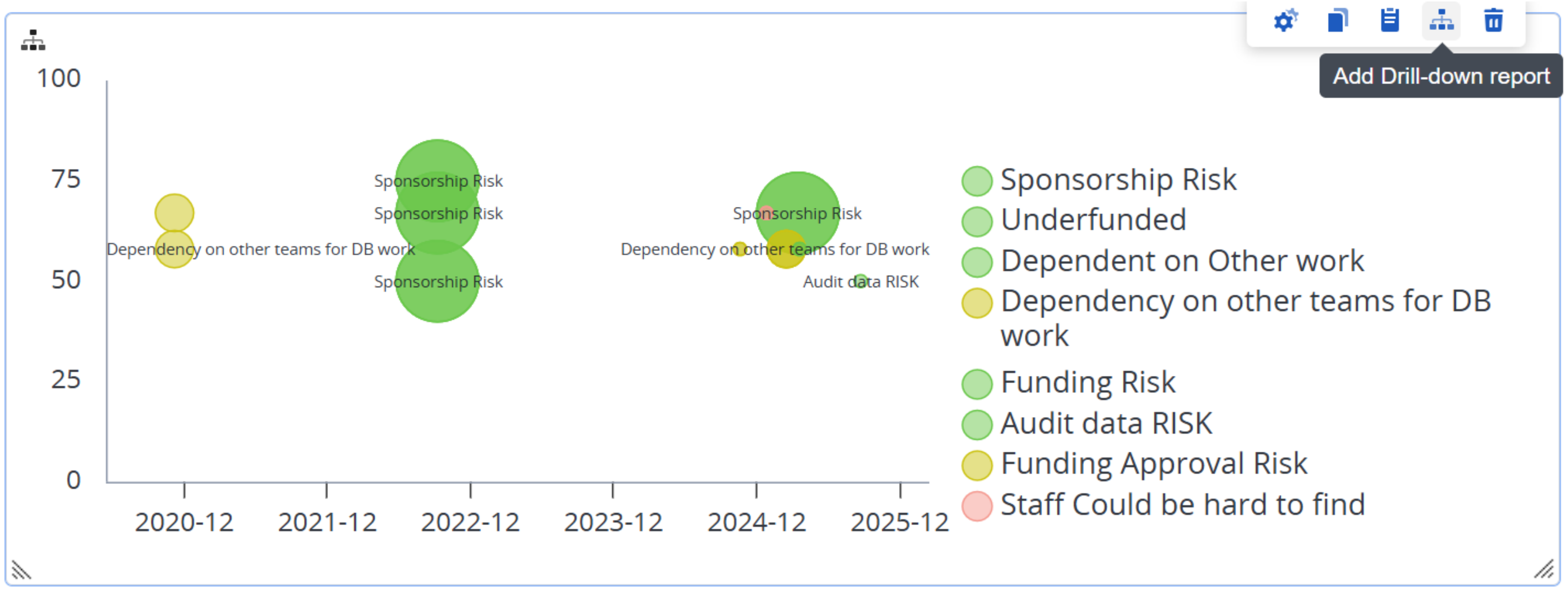
- Add Start/finish date and view the Gantt

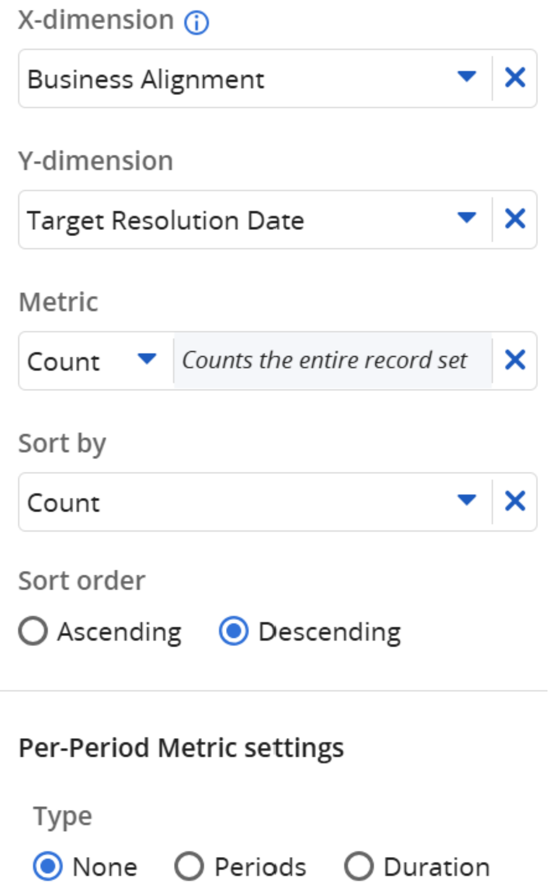
Name	Investment ID	Manager	Budget Cost	Work Status
2025 RegoU BYO Innov...	PR2165	McCoubrie, Wes	0	Requested
2026 Annual Plannning	ID1055	Hazelzet, Brian	0	Requested
AA DPM Loan App Rel 4.0	PR2002	Clark, Patrick	0	Active
AA Visual Impacts RM	PR2109	Martin, Paul	0	
ABLE Payments	PR2009	Calderon, Mindy	126,000	Requested
ABLE Payments AR	ID1086	Hopkinson, Tressa	0	Requested



Report Designer – Bubble Chart

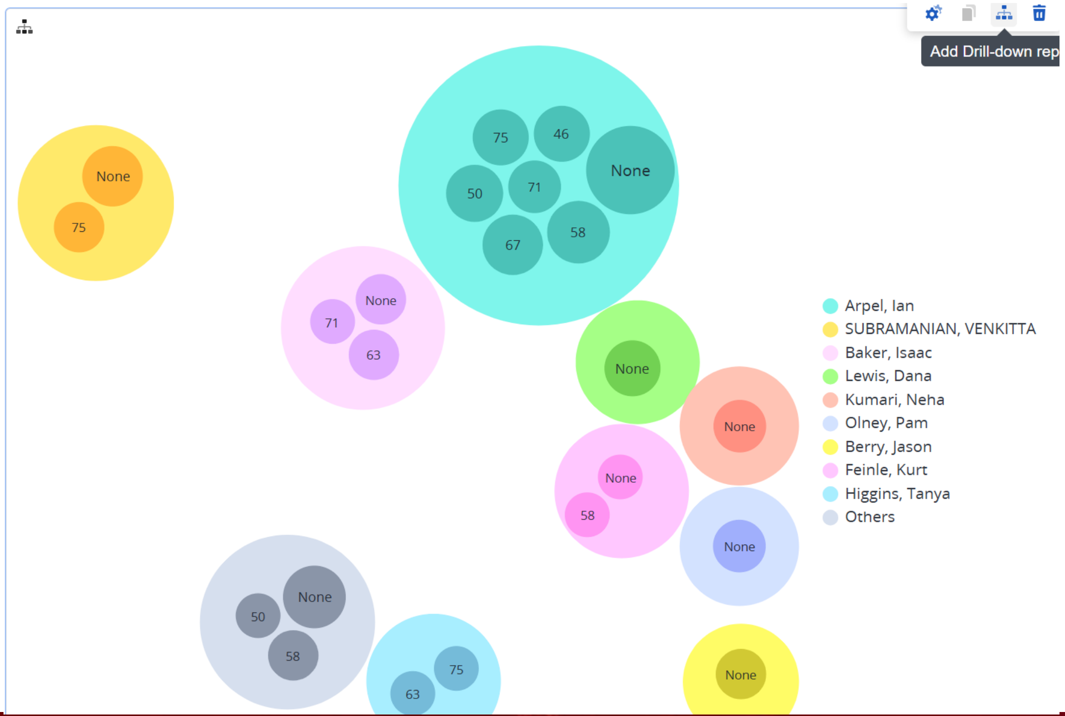
- Add a bubble chart widget and select a data provider
- Specify x- and y-dimension to date or numeric fields, and metric
- Add a drill-down report if needed

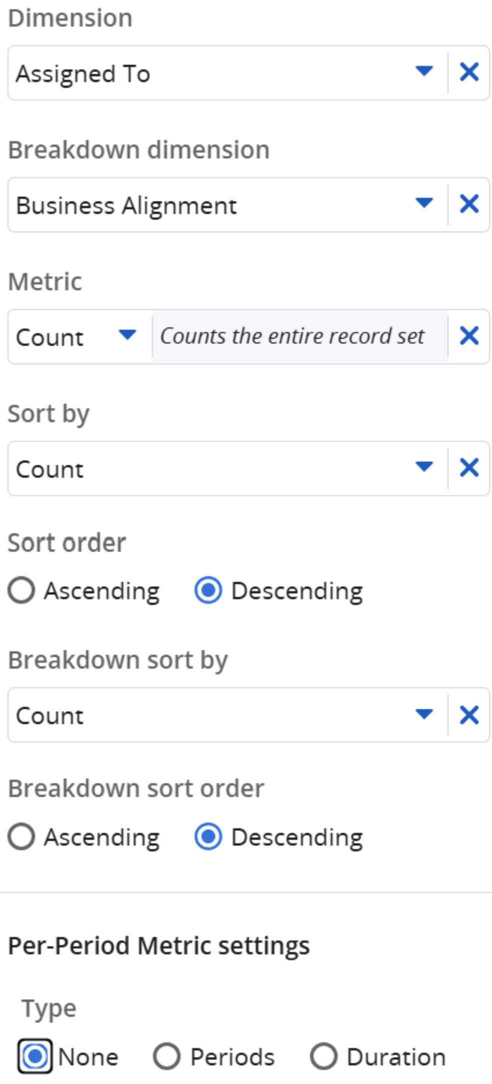




Report Designer – Split Bubble Chart

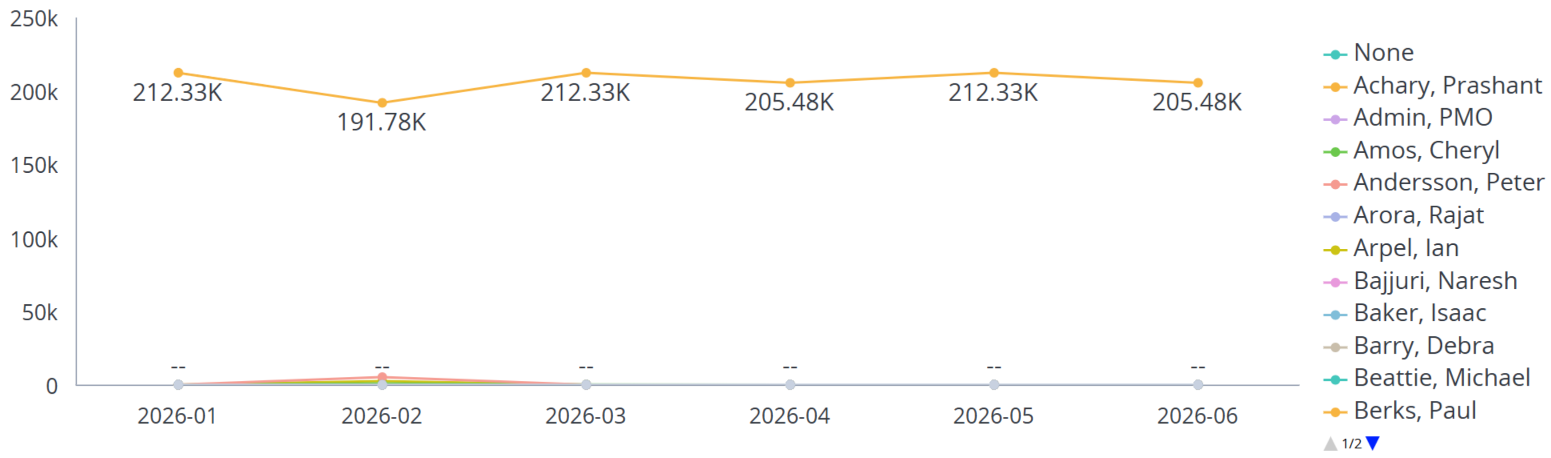
- Add a split bubble chart widget and select a data provider
- Specify dimension, breakdown dimension and metric
- Add a drill-down report if needed

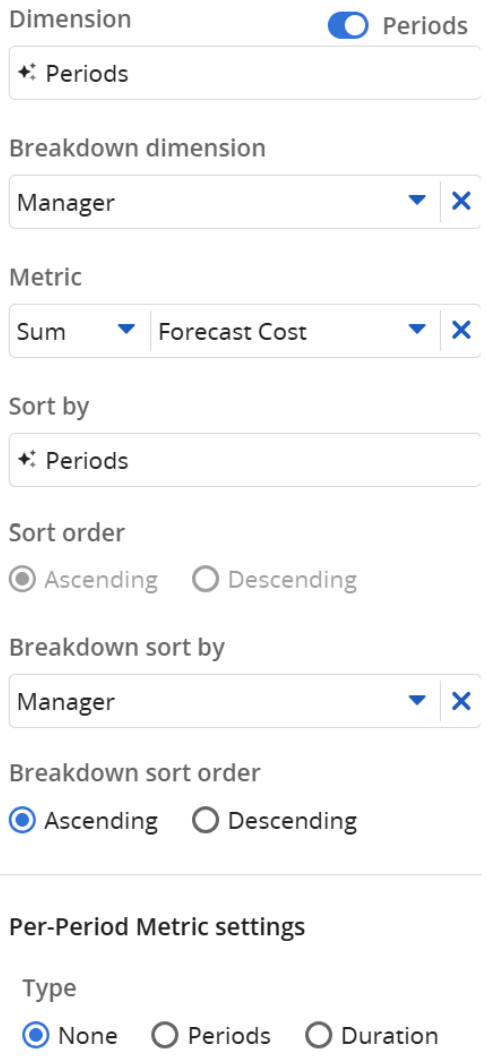




Report Designer – Line Chart

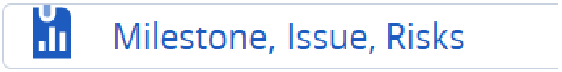
- Add a line chart widget and select a data provider
- Dimension (x-asix) could be periods, or a selected field
- Add metric, and breakdown dimension if needed



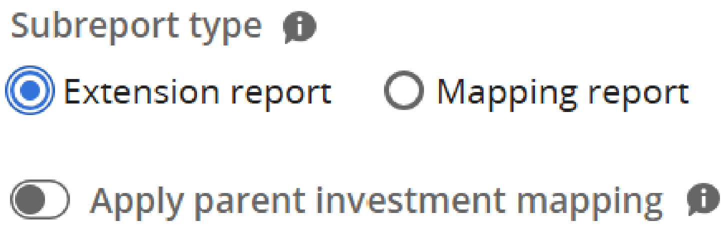


Report Designer - Subreport

- Add a subreport widget and select a data provider



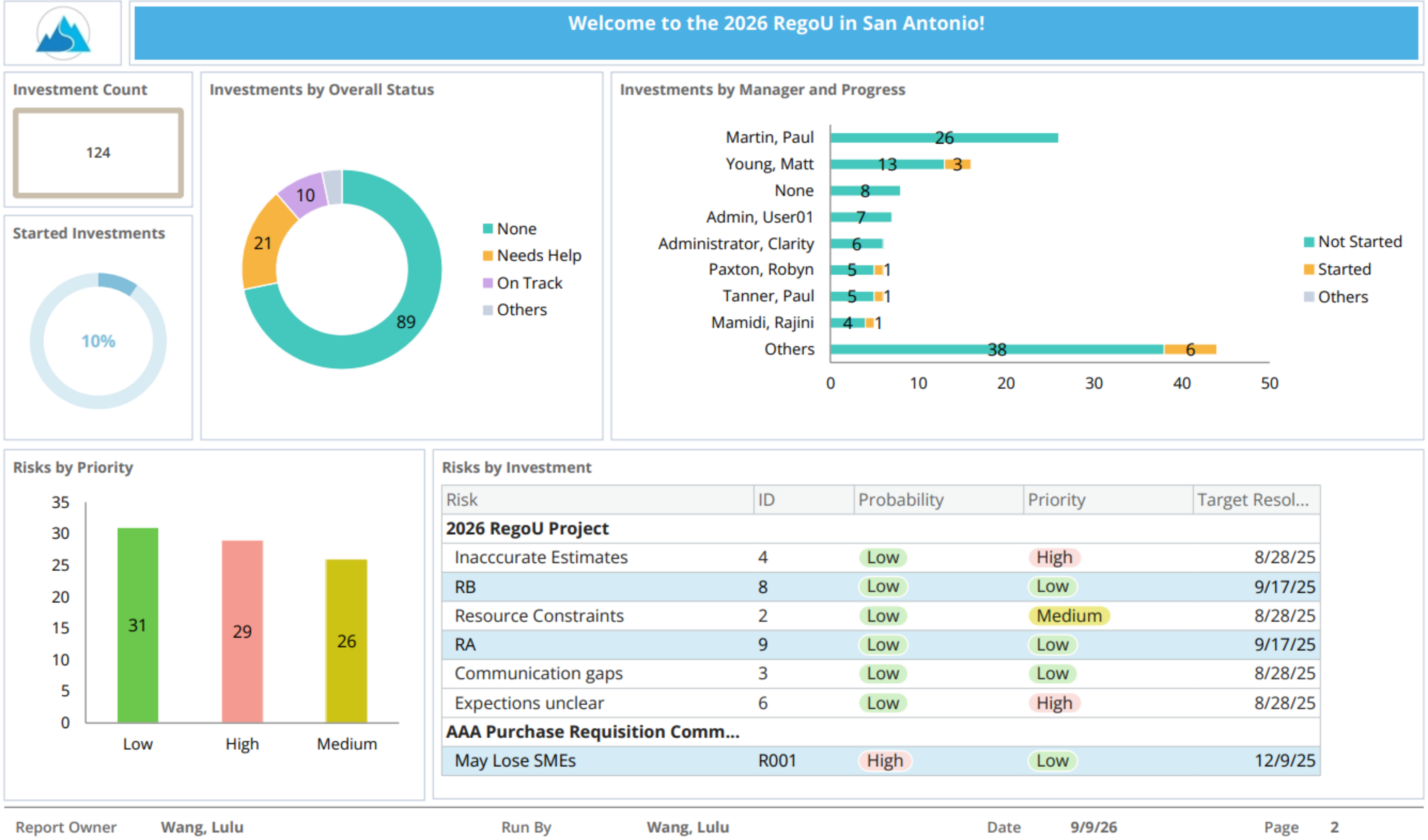
- Configure subreport type:
  - Extension Report: allows the current report to render overflow content or additional attributes beyond a single page
  - Mapping Report: Nests a related subreport, displaying data based on a defined relationship with the current report
- When creating a program report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



- 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.



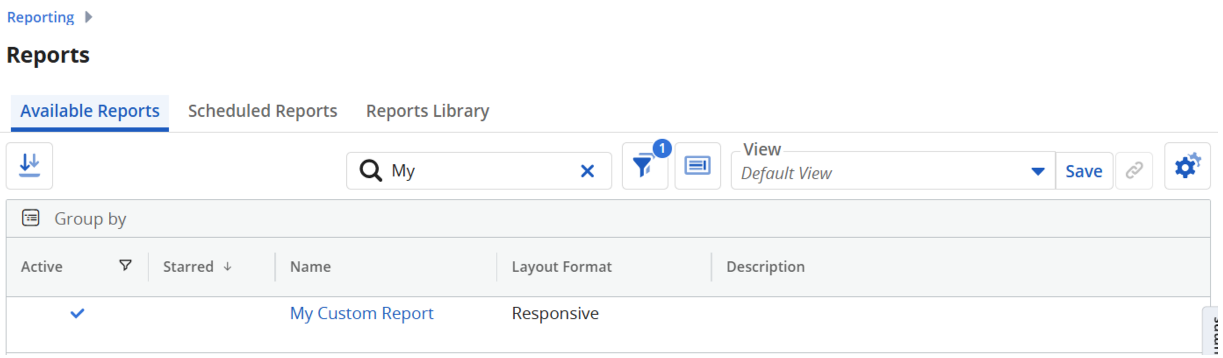
Reports

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.

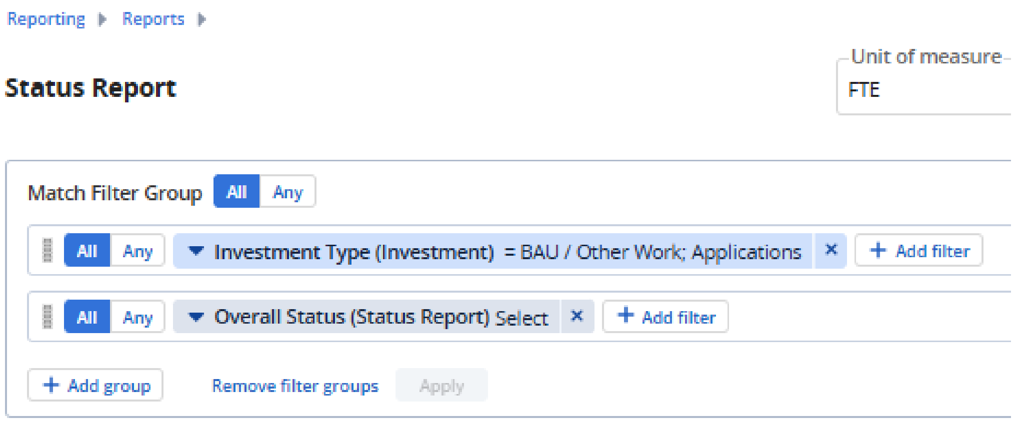
- Reports Library tab stores output from both scheduled runs and on-demand exports from the report viewer.

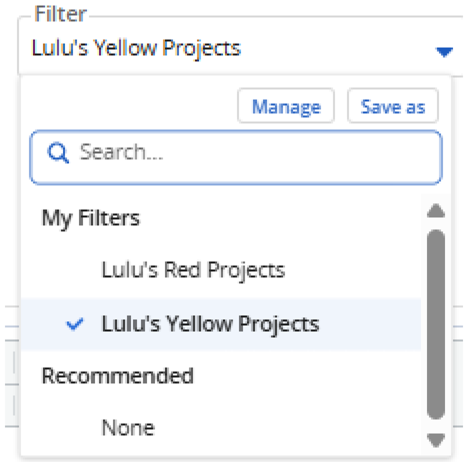
Reports - Export

- Based on the Layout Format, export option 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



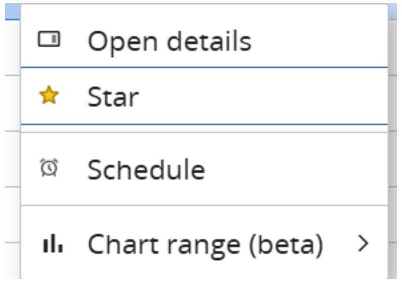


- Users could also save customized filter views for easy navigation

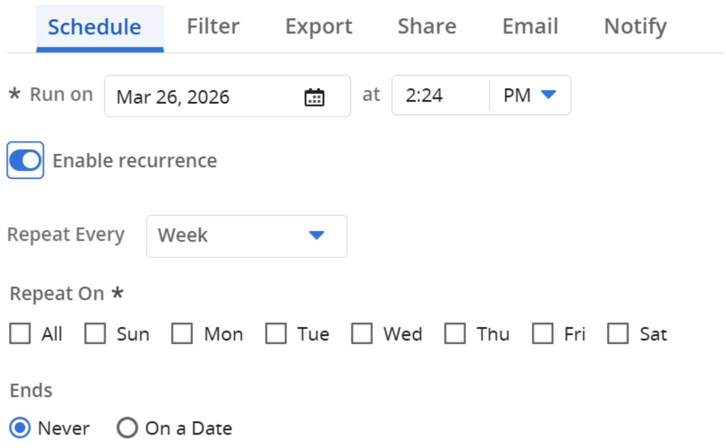
Let Rego be your guide.

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

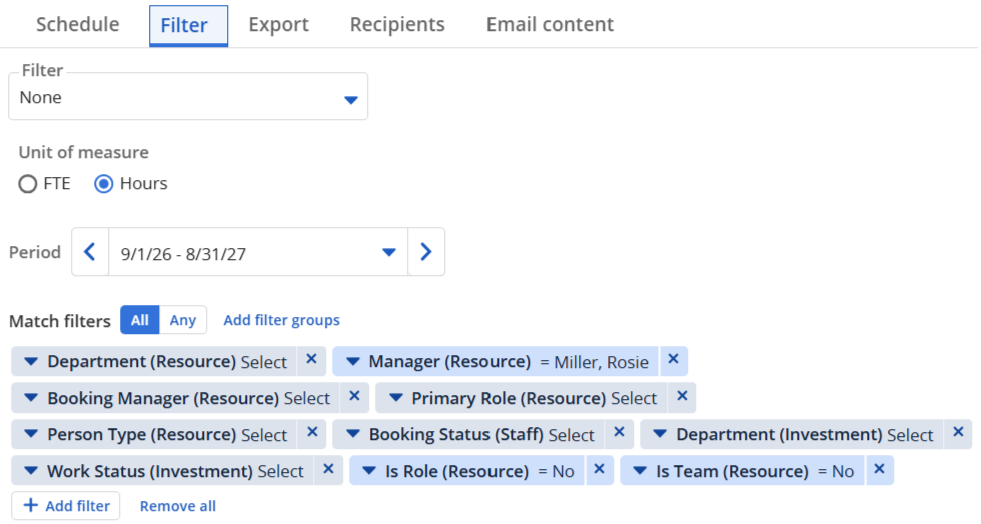


- Can run immediately or enable recurrence

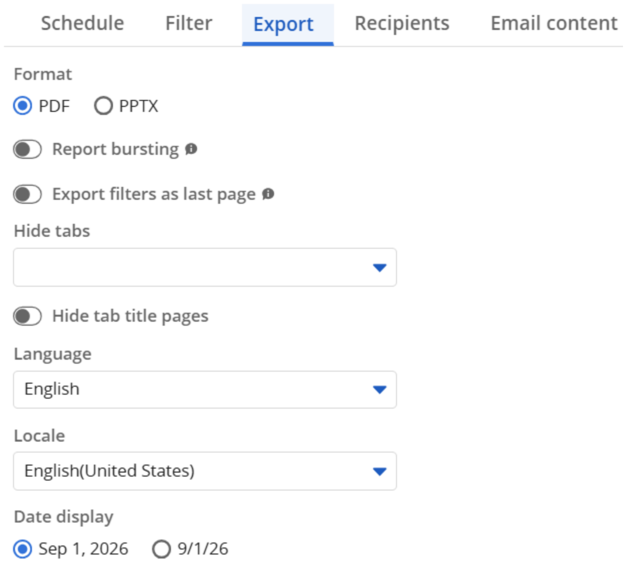


Reports - Scheduling

- Pick the necessary filters

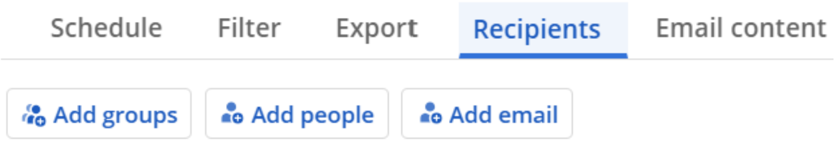


- Configure the Export options

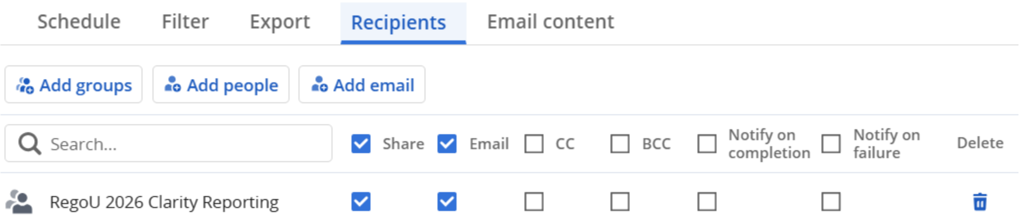


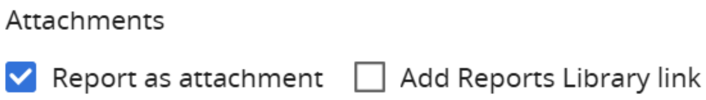
Reports - Scheduling

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

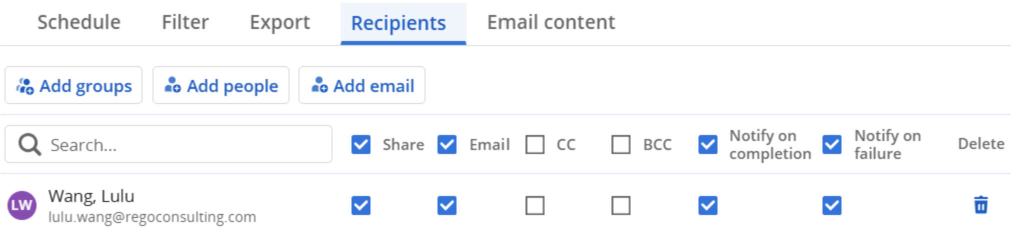


- Check the Email to box send scheduled outputs to as an attachment or with a link to Report Library to internal or external recipients



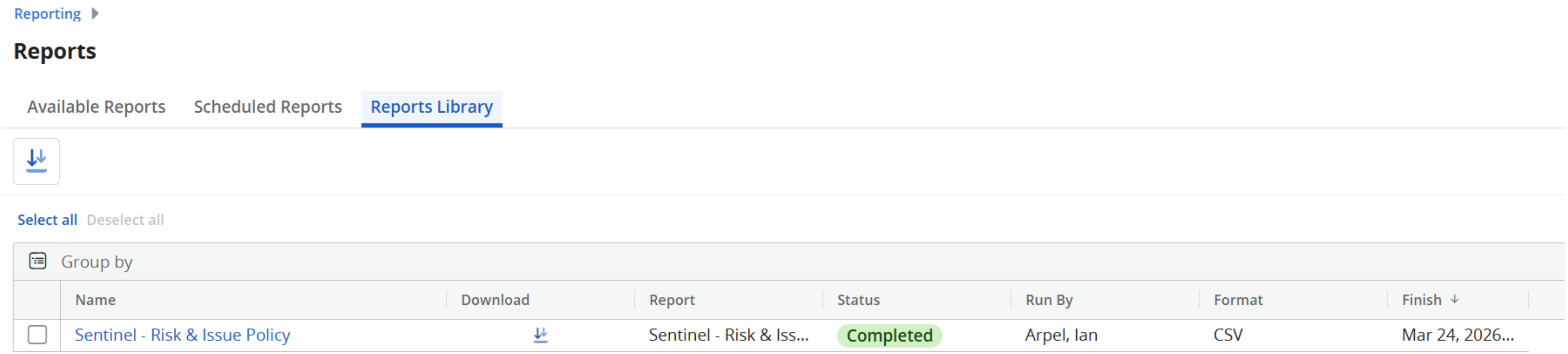


- Check the Notify boxes to send the status of the schedule (failure or completion)



Reports - Scheduling

- Scheduled report outputs are available to download from the Reports



Key Features – Data Provider

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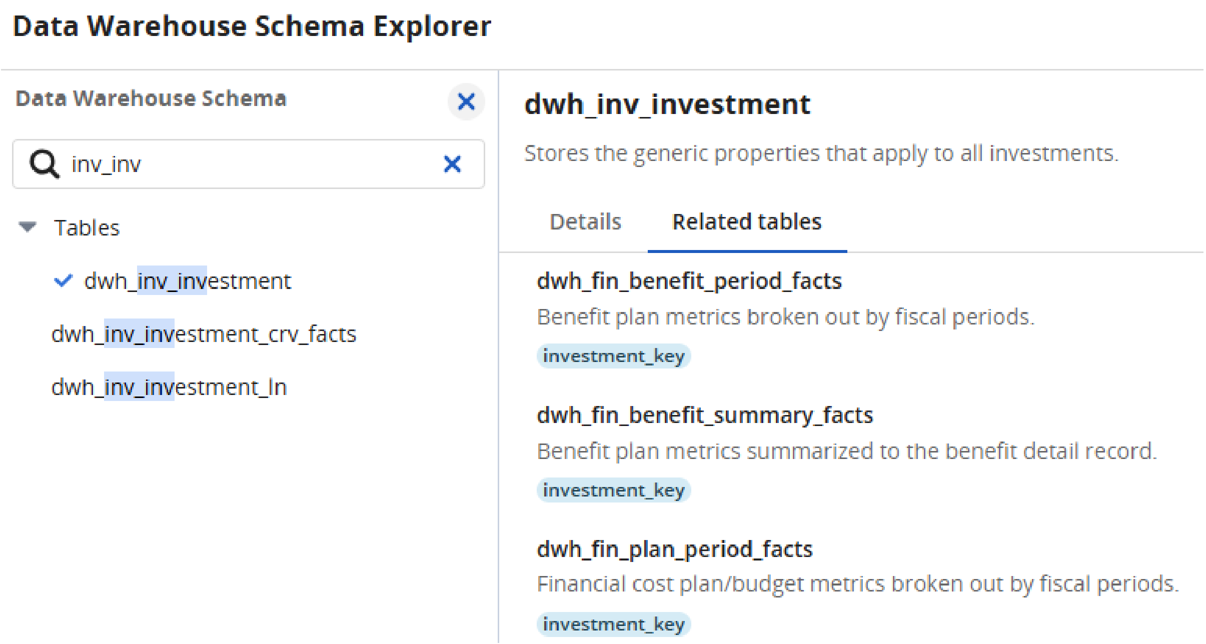
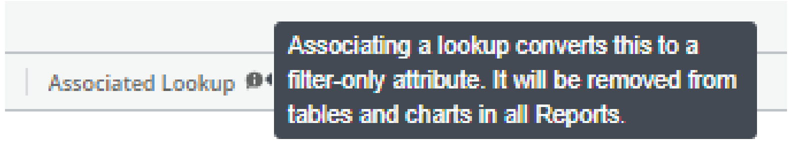
Key Features - Data Provider

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

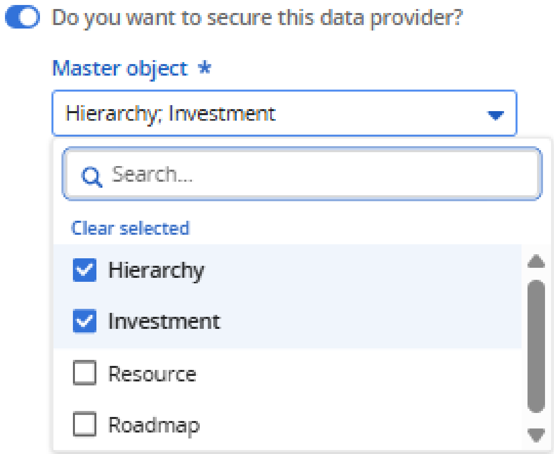


Key Features - Data Provider

- 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

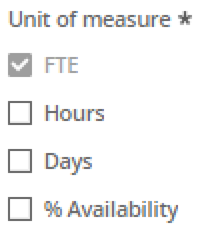


Key Features – Report Designer

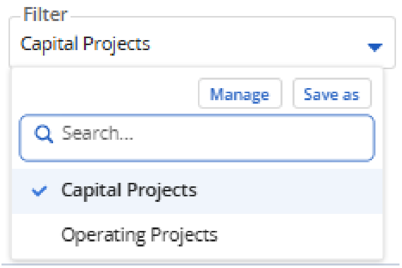
Key Features – Report Designer

- OOTB Per-Period Metrics and Period Filter

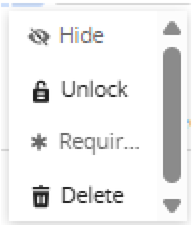
- Designers can specify which Unit of Measure users can choose from (FTE/Hour/Day/% Availability)



- Pre-defined Filter Views

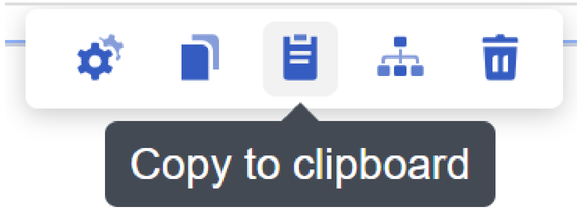


- Designers can configure filters to Hide/Unlock/Lock/Required

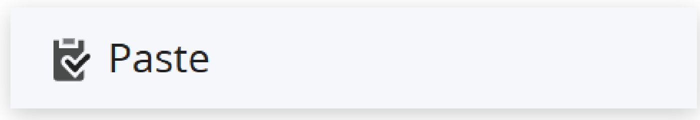


Key Features – Report Designer

- Use Copy to Clipboard to a widget



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



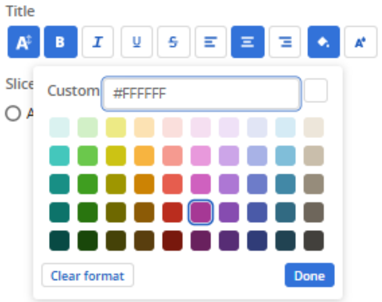
- It copies over the Data Provider too if not already exist
- Doesn't apply to attribute groups, or subreports

Key Features – Report Designer

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

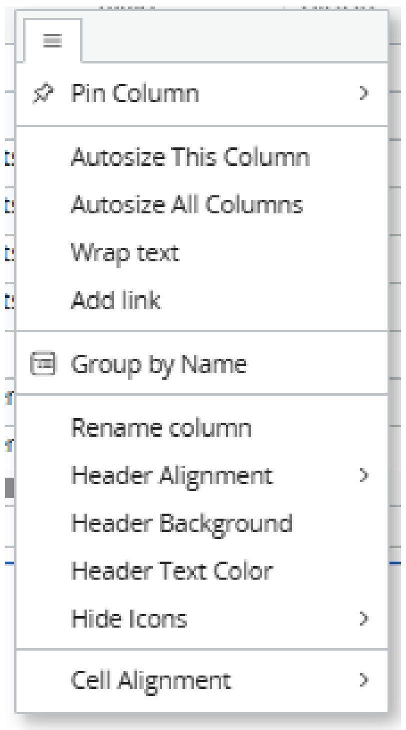
- Color coding Pie/Bar chart by Object Color Mapping

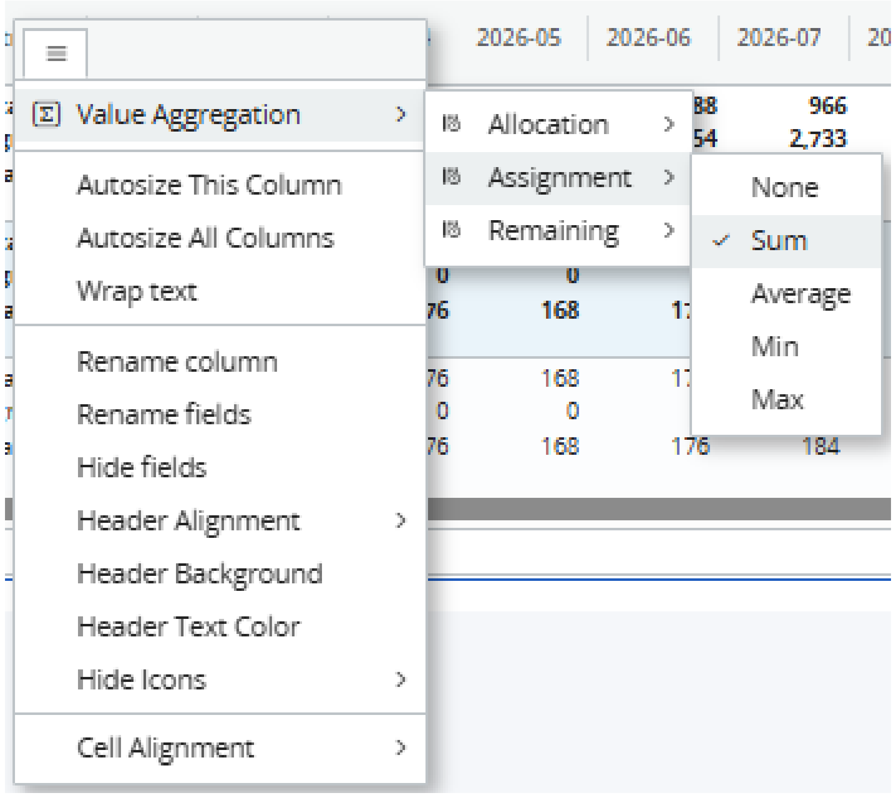
- Color coding titles with HEX codes



Key Features – Report Designer

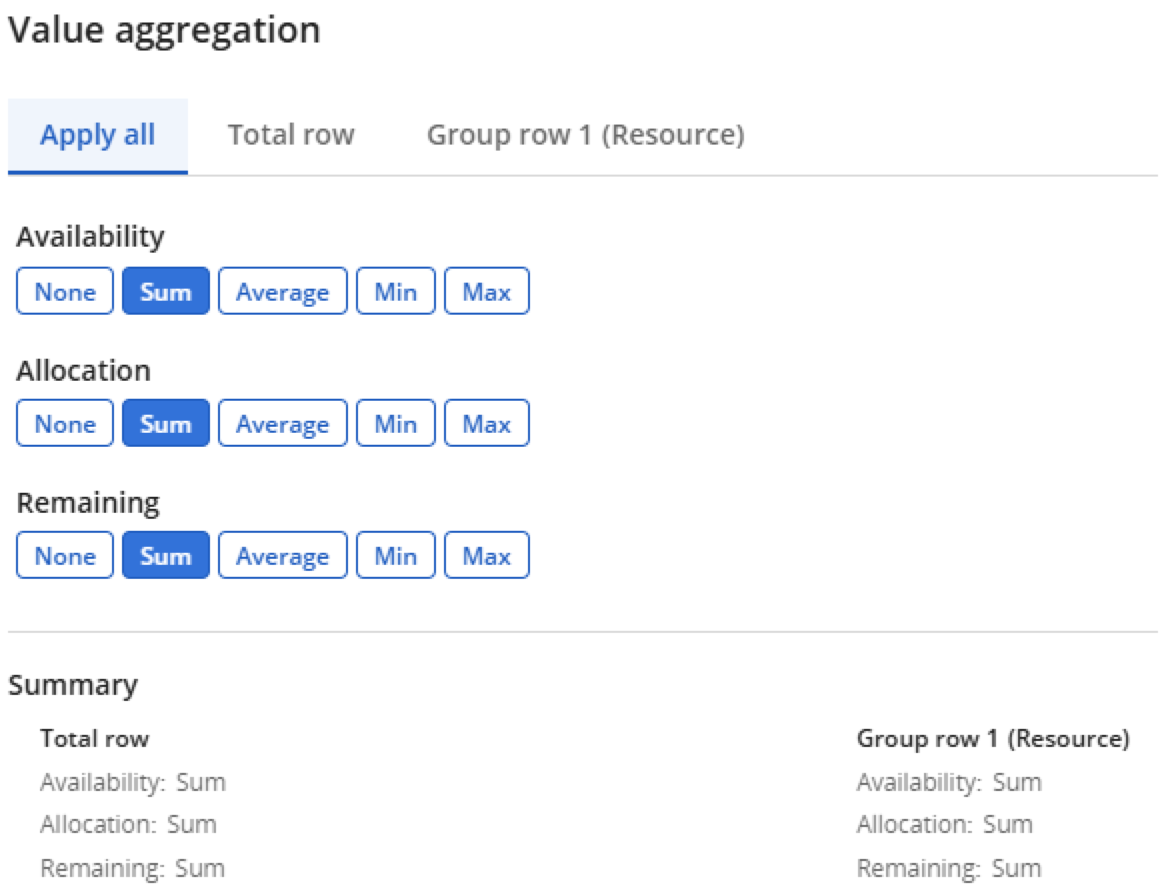
- In a table widget, click the hamburger menu on each field for more tailored configuration
  - Rename fields
  - Alignment
  - Hide Icon
  - Aggregations for numeric fields etc.





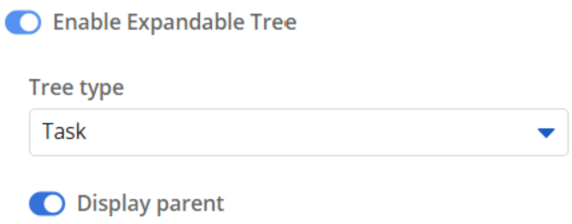
Key Features – Report Designer

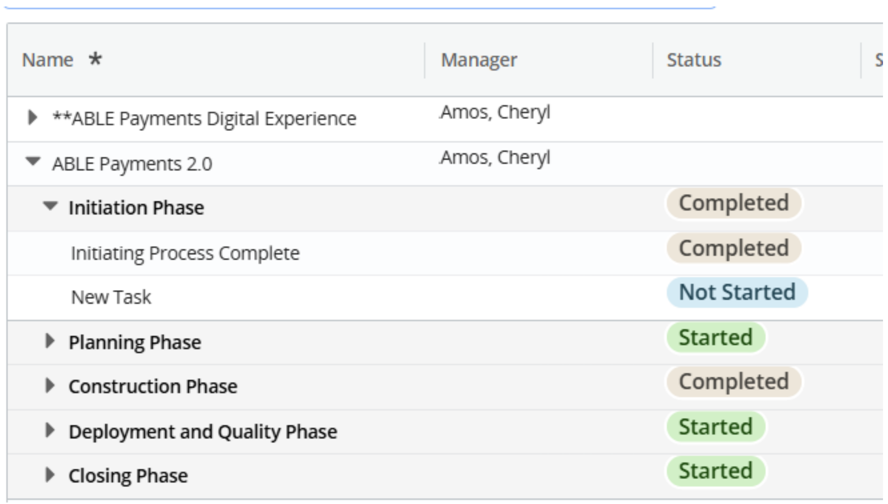
- In a table widget with group by, customize the aggregation at different levels
  - None
  - Sum
  - Average
  - Min
  - Max



Key Features – Report Designer

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





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)	RPT00000062

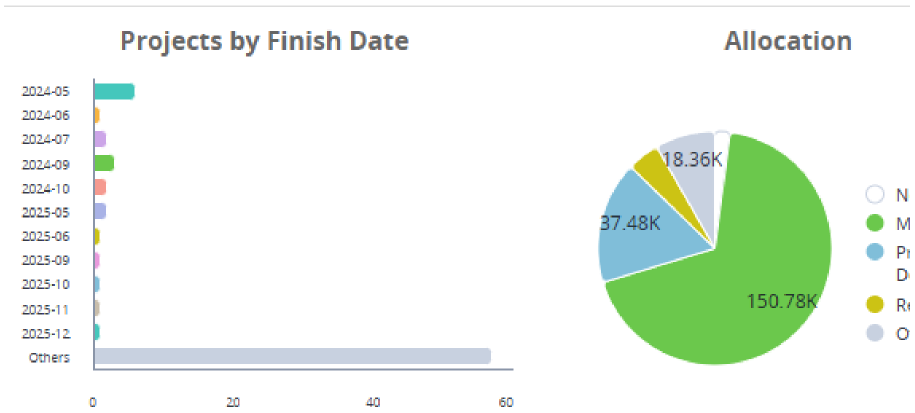
Group by

ID	Department OBS	Organizational
RPT00000003	Corporate:ABLE ... Unit/Marketing	
RPT00000002	Corporate:IT/Development	All ... Technologies
RPT00000059		
SYSRPT00001		
SYSRPT00002		
SYSRPT00003		

Search...
- - None - -
Corporate:IT/Development

Key Features – Report Designer

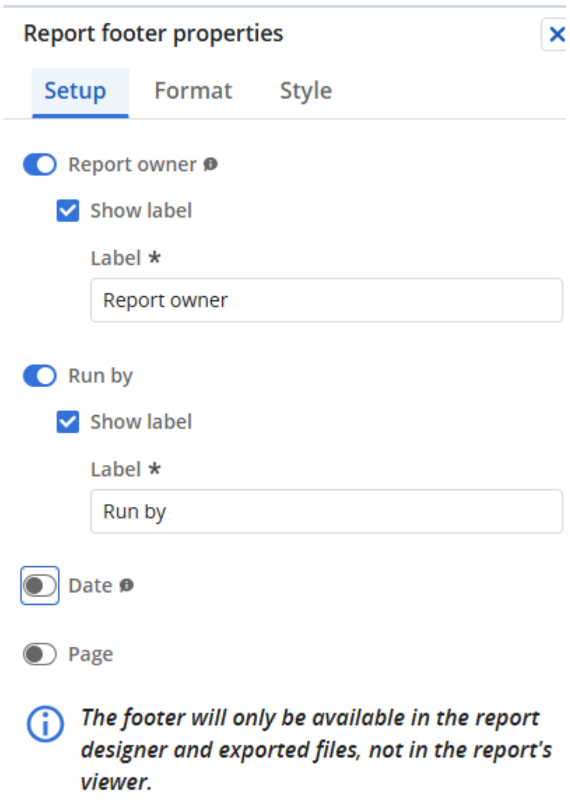
- Preview reports directly from the Report Designer before publishing



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

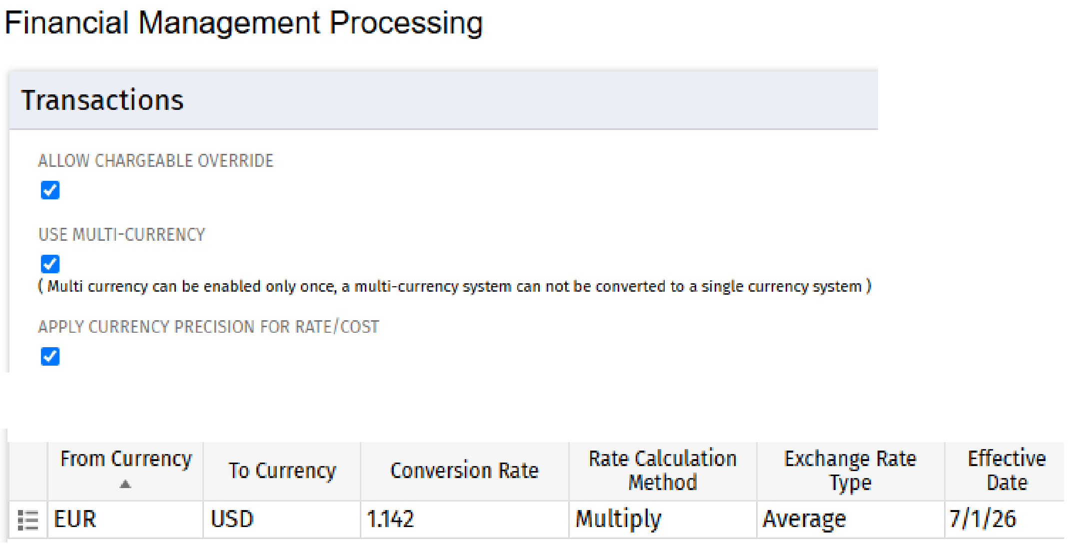
Key Features – Report Designer

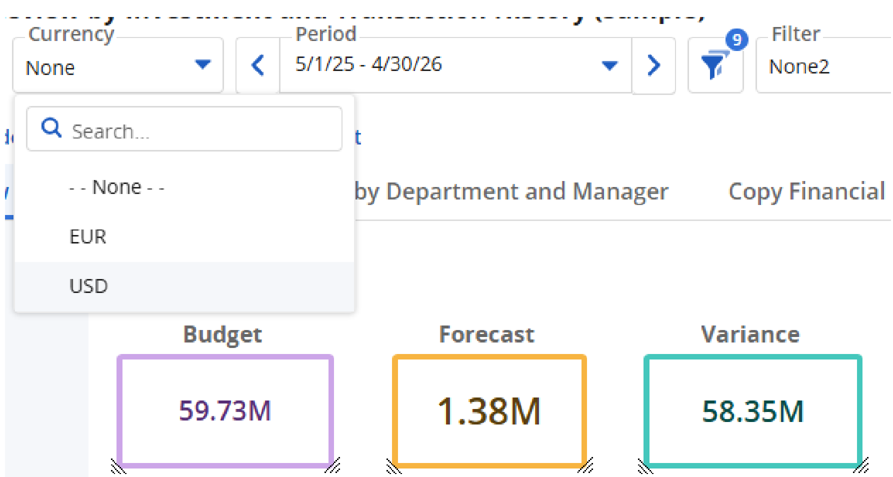
- For Fixed reports, customize a footer that can be repeated on each page’s export file
  - Report Owner
  - Run by (user who ran or scheduled a report)
  - Date
  - Page



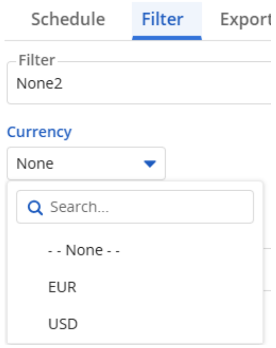
Key Features – Report Designer

- 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





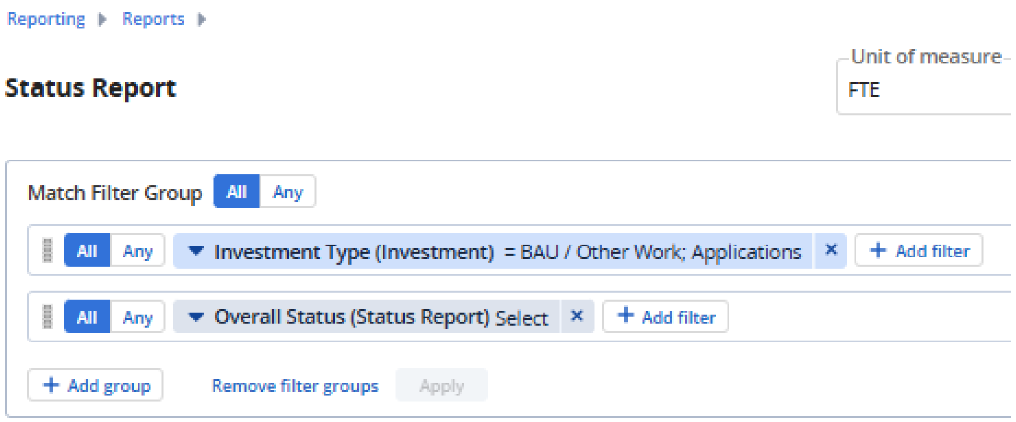
- When scheduling report, specify the currency type

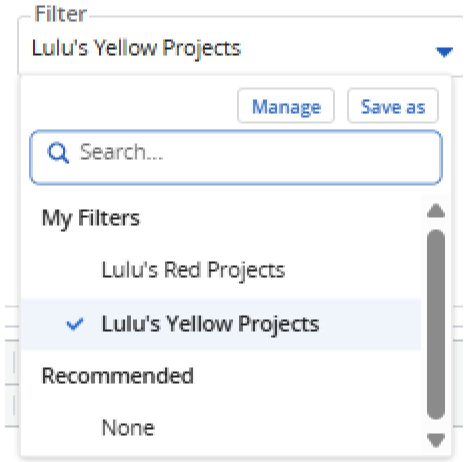


Key Features – Reports

Key Features – Reports

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

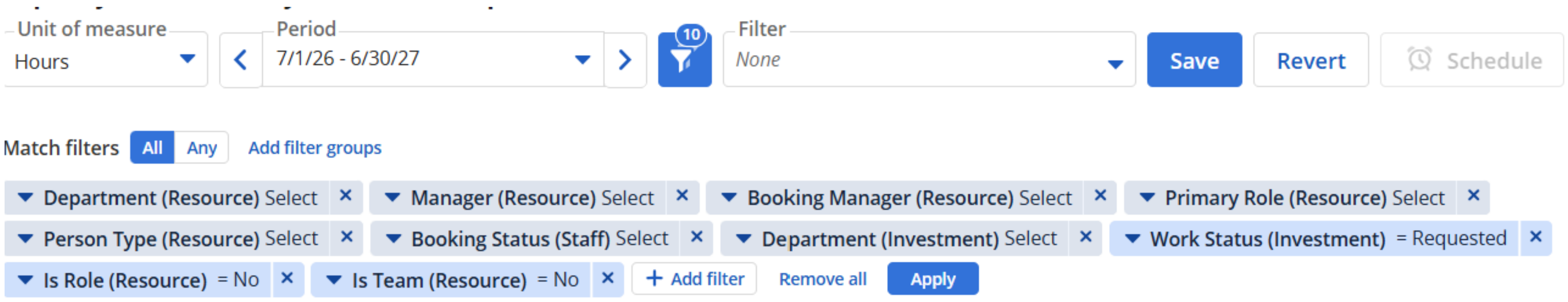




- Users could also save customized filter views for easy navigation

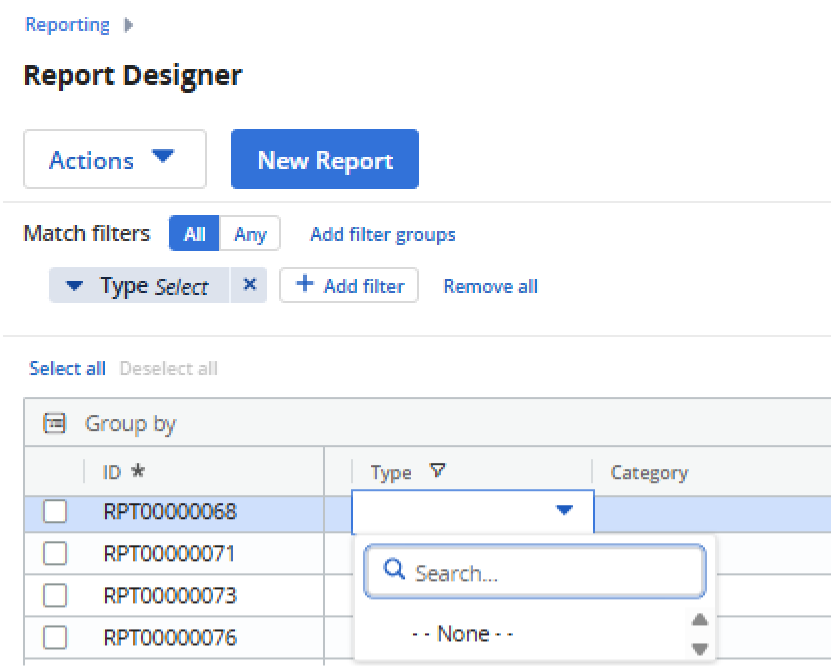
Key Features – Reports

- 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

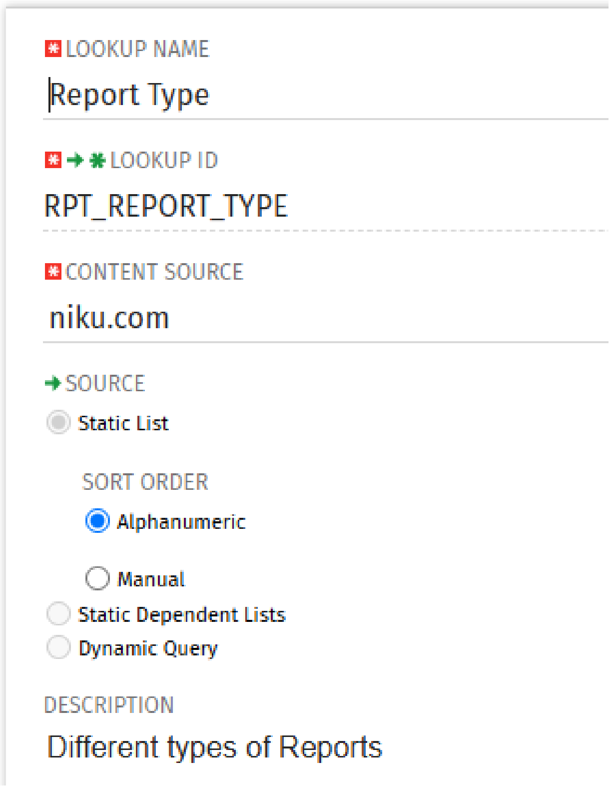


Key Features – Reports

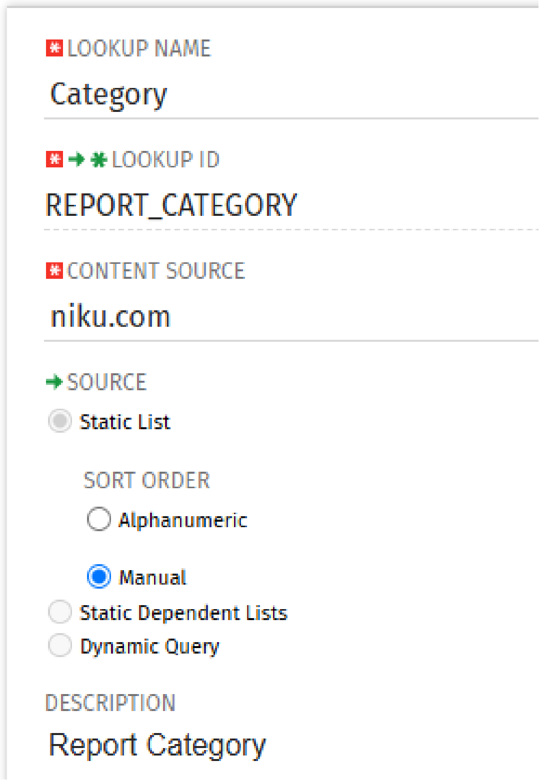
- Utilize the Type and Category lookups for customized grouping and filtering of reports



Lookup: Report Type - *General*



Lookup: Category - *General*



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

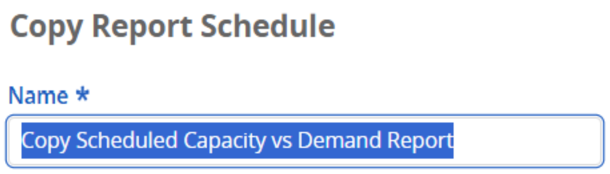
Project Type / Project	Manager	ID *	Start	Finish	Overall Status	Business Alignment	Risk Score	Days Late
Total								
None								
PR2124	Arpel, Ian	PR2124	3/12/26	10/23/26				0
Major Project								
ABLE Payments	Lewis, Dana	PR2009	1/26/24	12/30/26	On Track: 30	Good Alignment: 88	35	29
ABLE Payments 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

Export to Excel

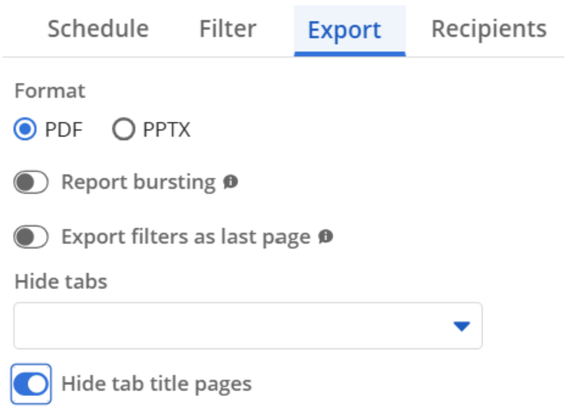
1 - 50 of 84

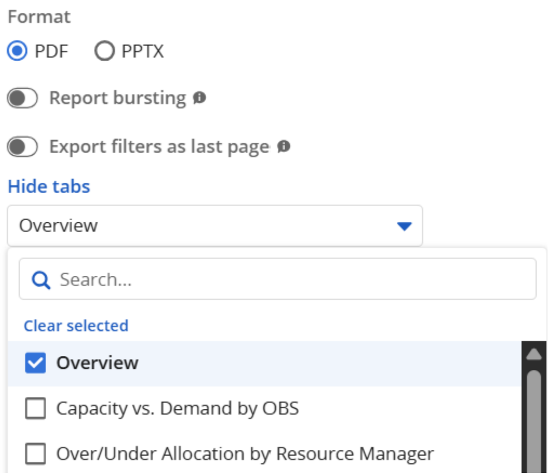
Key Features – Reports

- 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



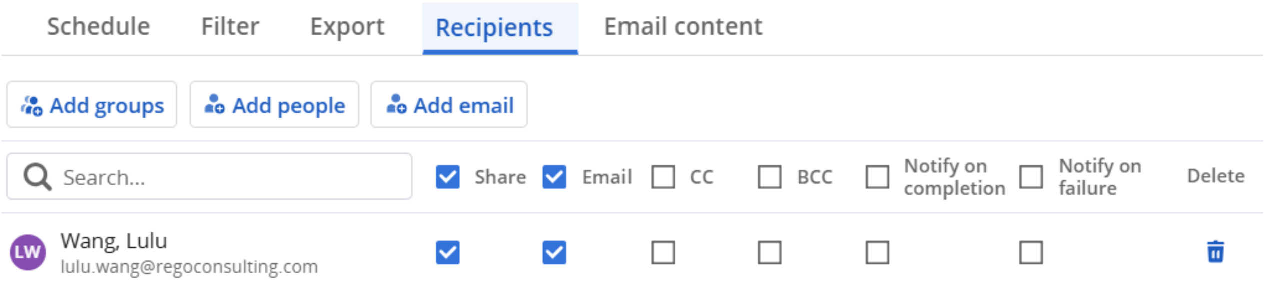
- Option to hide tab title pages or selected tabs in scheduled exports





Key Features – Reports

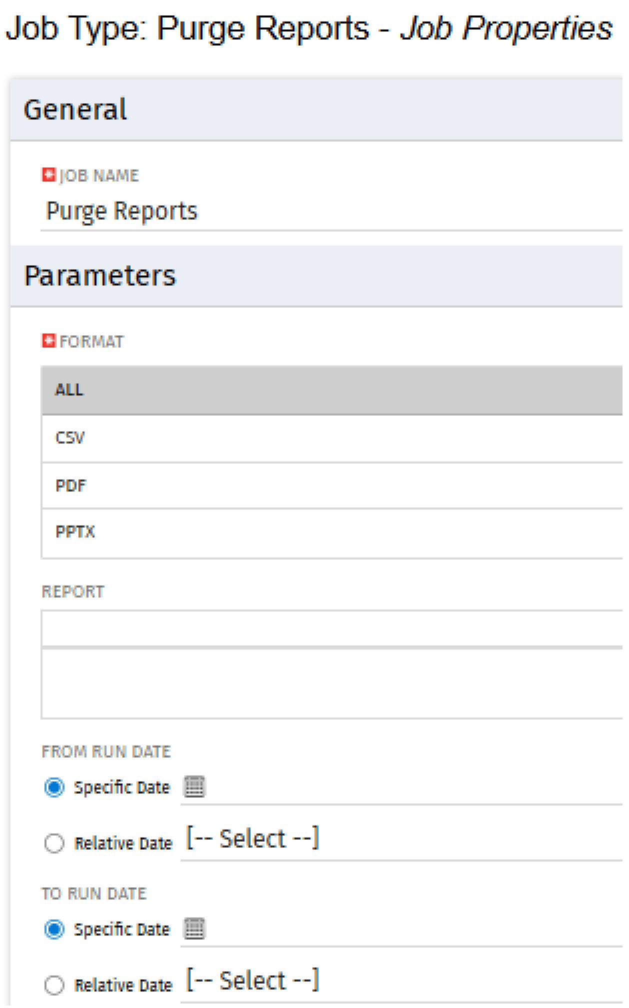
- New toggle to not send emails for empty reports
- When scheduling a report, Share sends a notification to the bell icon, Email sends an email



- Empty report still get saved to report library

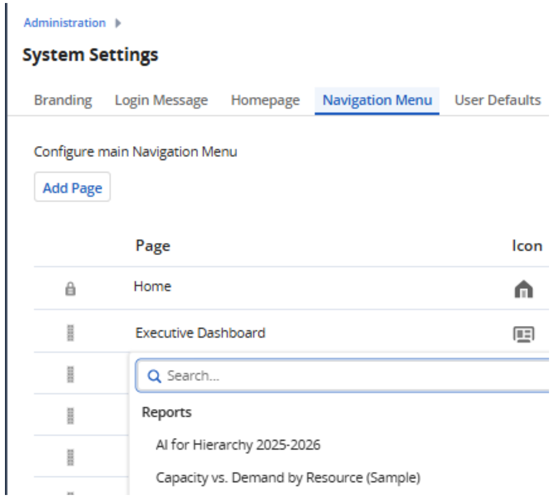
Key Features – Reports

- 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

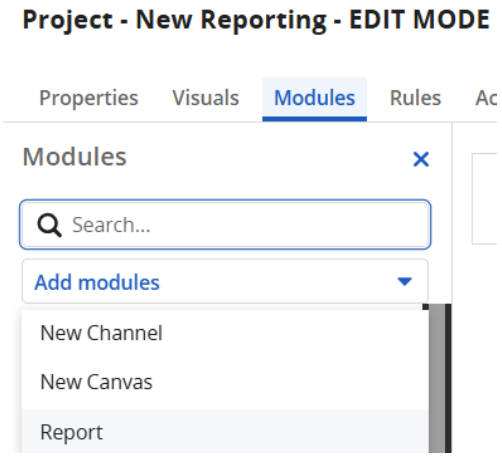


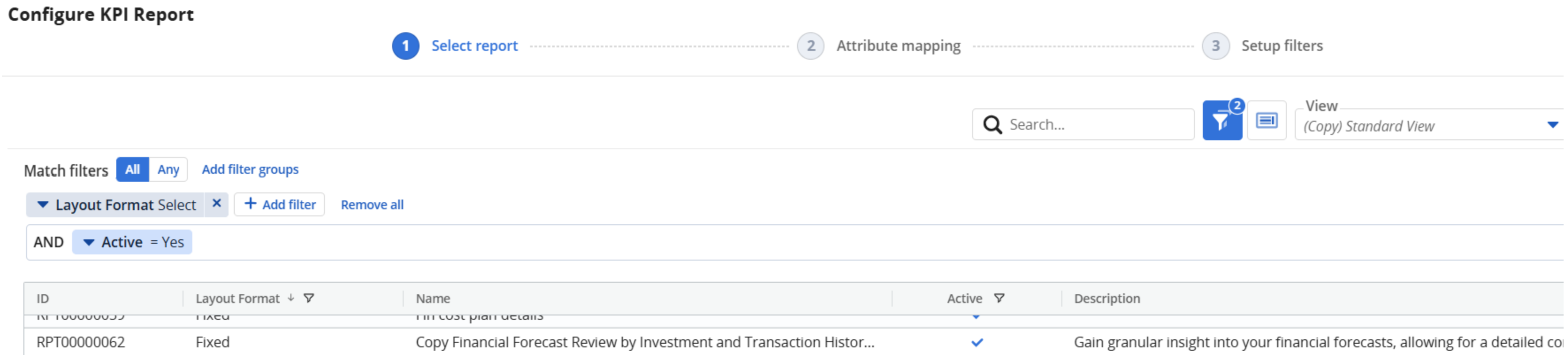
Key Features – Reports

- Add active published reports as Menu Item



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





Migrate Data providers and Reports

Introduction

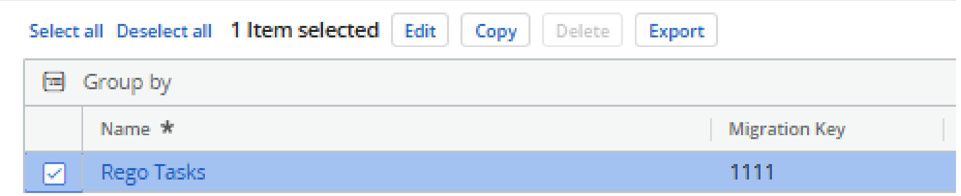
- Use Import/Export to migrate, share, or back up Data Providers or Reports
- Specify unique migration key
- Includes drill-down, sub-reports, or images
- Starting 16.4.1, migration would create new, or update existing data provider or reports
- Beta on 16.4.2, enable via Administration > Actions:

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.

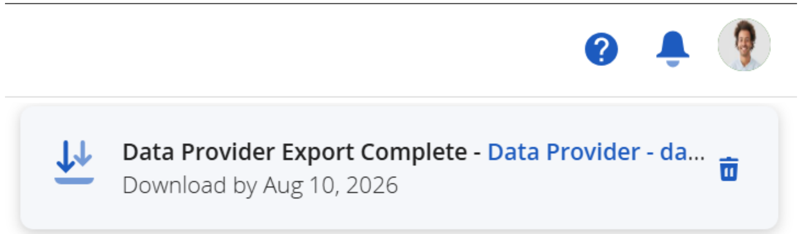
Starting 16.4.1, migration would create new, or update existing data provider in target environment

Migration - Data Provider

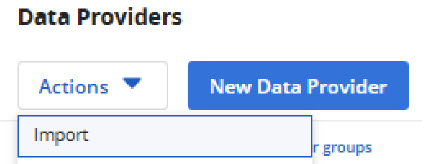
- Add a migration key to migrate data providers across environments of the same version (DEV/TEST/PROD etc.)



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

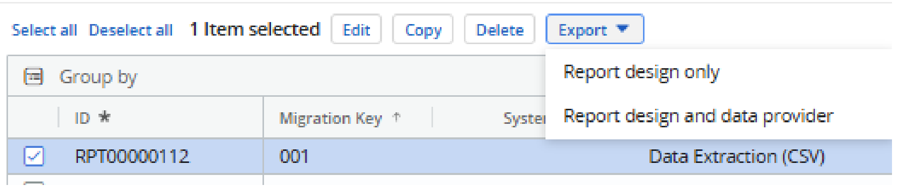


- In the target environment, click Actions > Import and select the zip package.

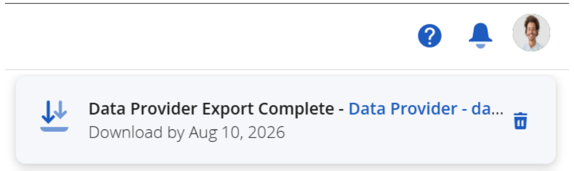


Migration – Report Designer

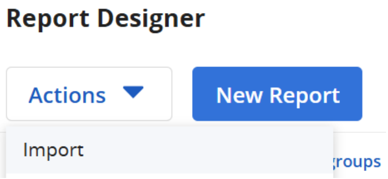
- Add a migration key to migrate reports across environments of the same Clarity version (DEV/TEST/PROD etc.)
  - Option to export both the Report designer and data provider in one package
  - Make sure each data provider and report have a unique migration key



- 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.



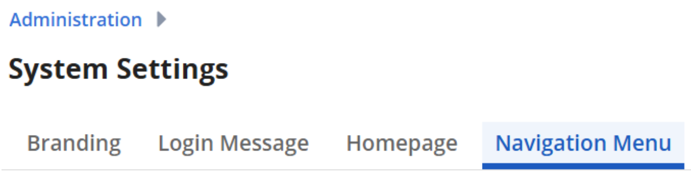
Embed Reports

Embed Reports

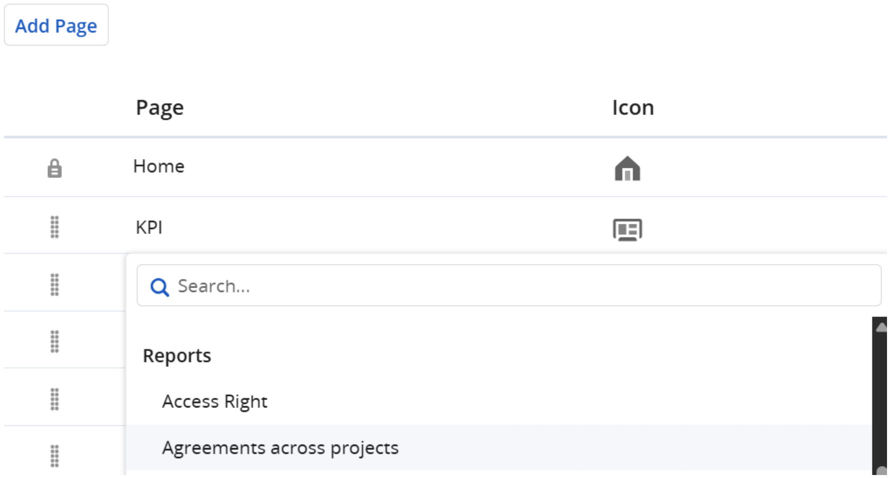
- Reports can be embedded as:
  - A Navigation Menu icon
  - A Page
  - A subtab within a blueprint, e.g. a project subtab
- The report needs to be Active and Published
- It supports embedding of any layout format:
  - Fixed
  - Responsive
  - Data Extraction (CSV)
  - Table (XLSX)

Navigation Menu Icon

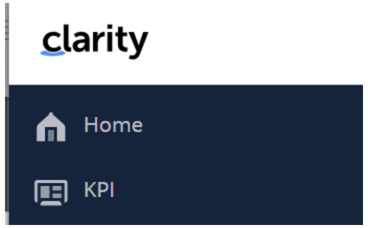
- To embed a report as a navigation menu icon, navigate to Administration > System Settings > Navigation Menu



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

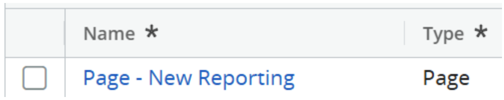


- Report will show up on the left navigation menu

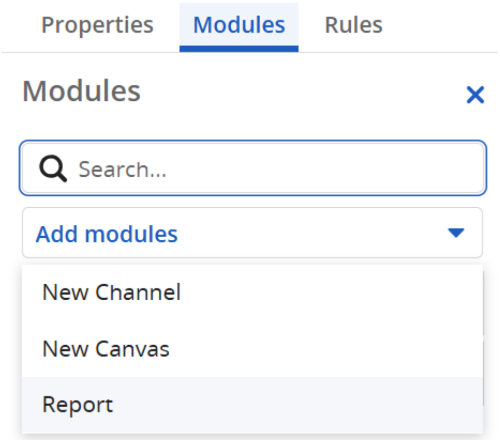


Embed as Page

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



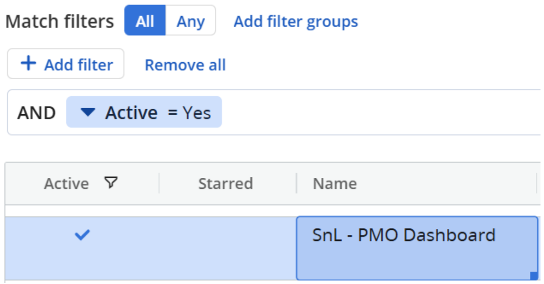
- Click into the blueprint, add a new Report Module



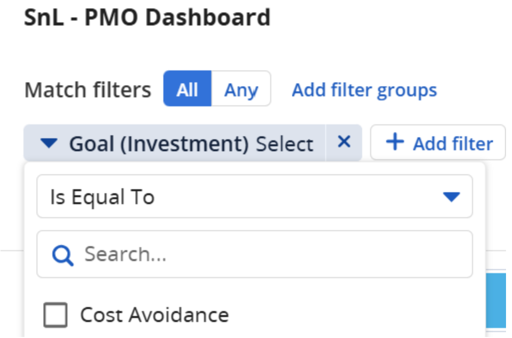
Embed as Page

- Follow the steps to configure the report

- Select an Active Published report



- Skip Attribute mapping, and configure filters as needed

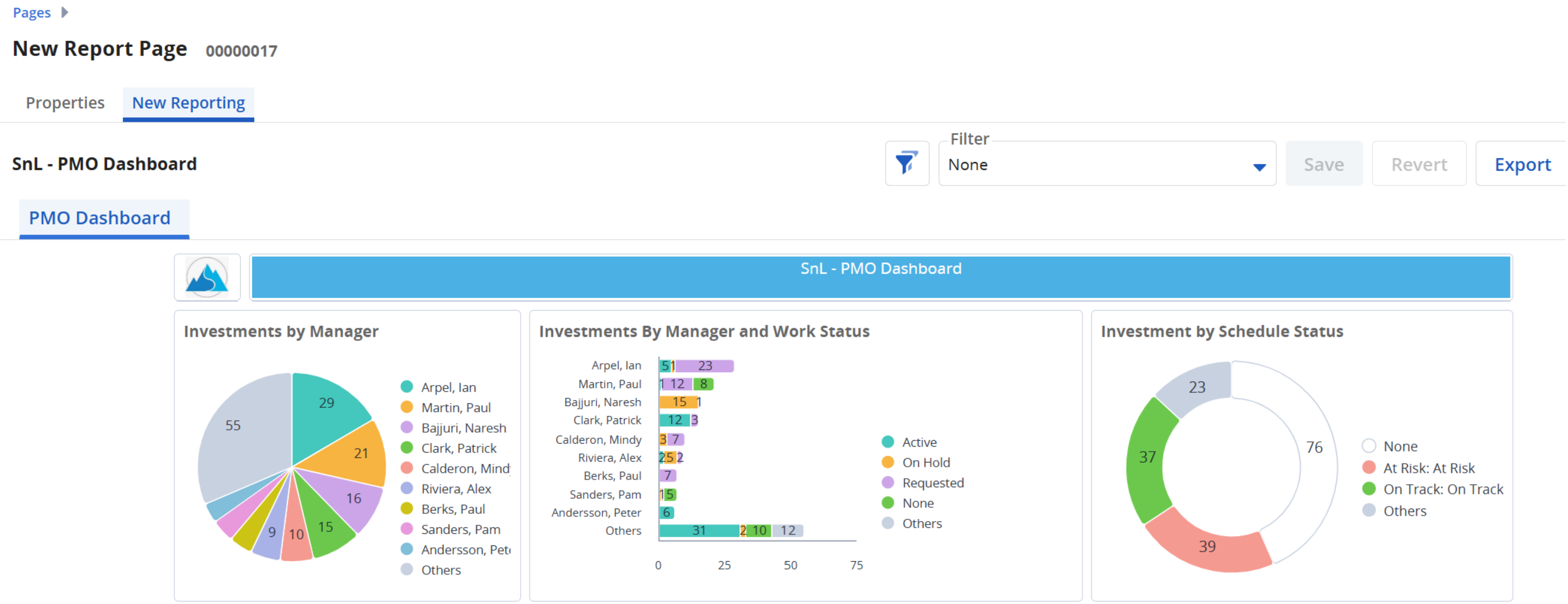


Embed as Page

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

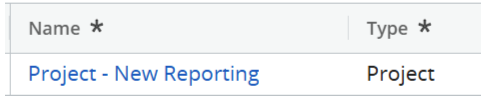
Name *	Blueprint
New Report Page	Page - New Reporting

- Click into the new page to view report content

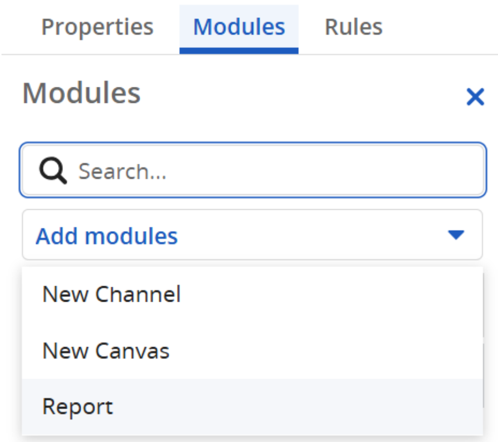


Embed with Parameters

- 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



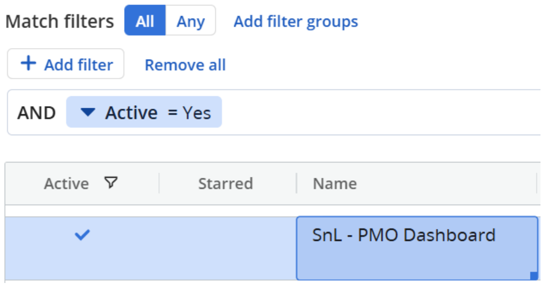
- Click into the blueprint, add a new Report Module



Embed with Parameters

- Follow the steps to configure the report

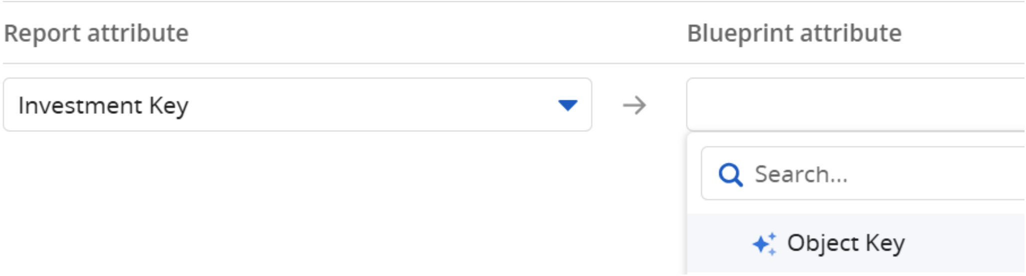
- Select an Active Published report



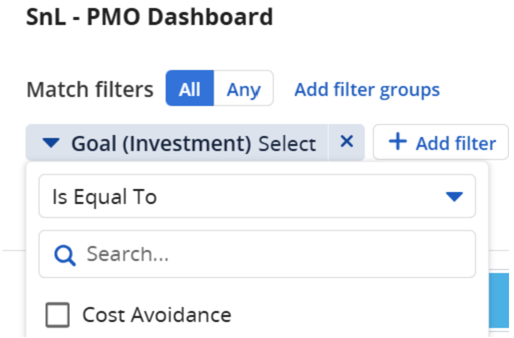
- Under attribute mapping, click Add New

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



- Set up filter if needed

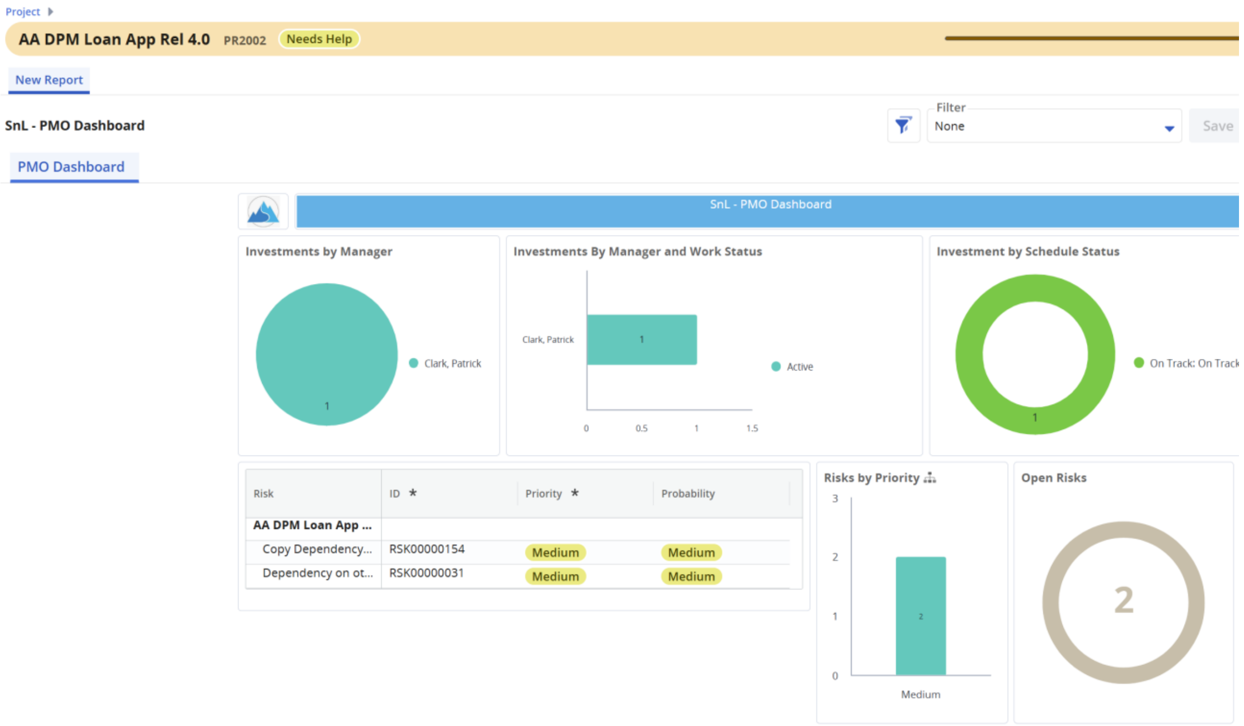


Embed with Parameters

- 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

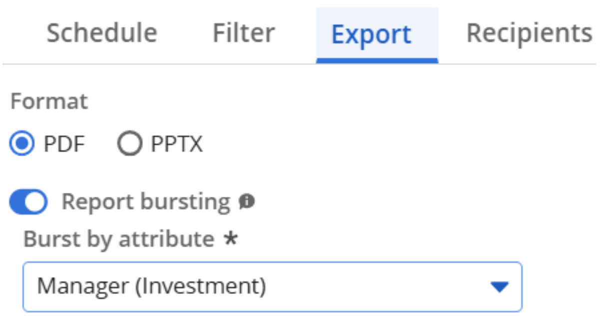
regoUniversity
SAN ANTONIO · 2026

Report Bursting – What is it

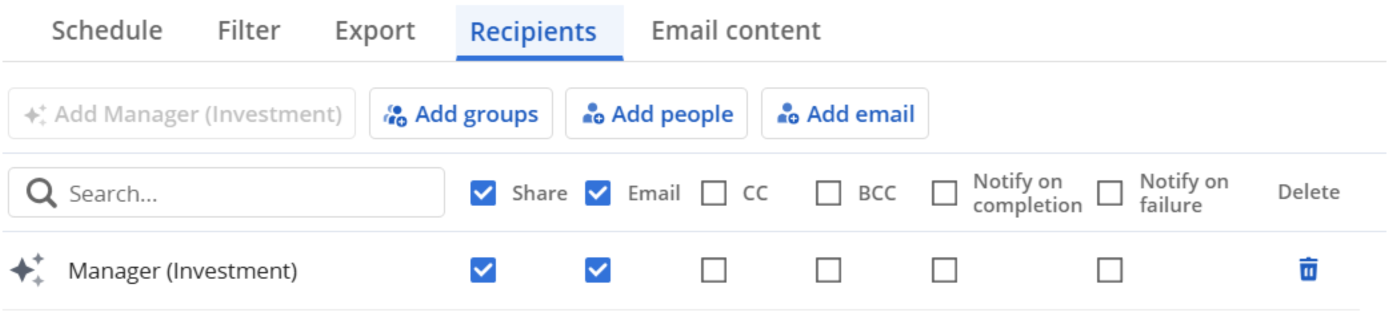
- One report schedule to dynamic recipients with tailored content
- Example to send Project Managers their own projects
- Available in 16.4.3
- Enable in Administration > Actions > Report Bursting
- Can only burst to clarity users

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



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



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

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

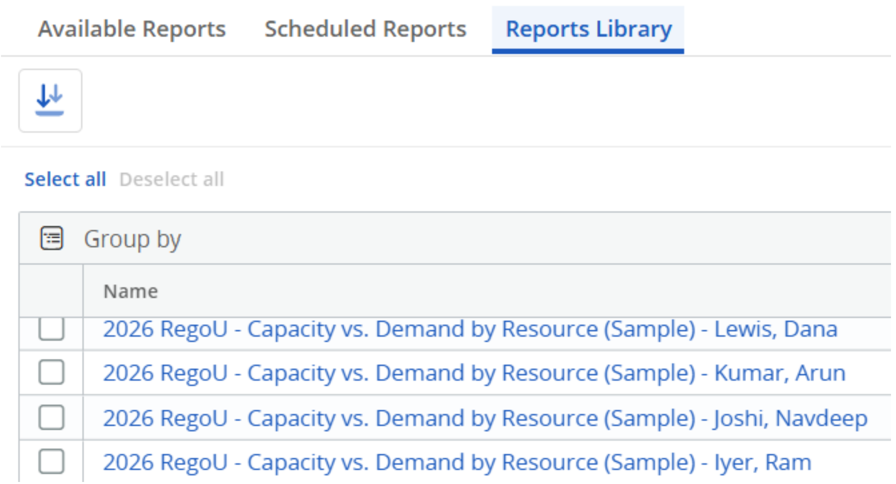
Filters
Currency: None
Unit of measure: Hours
Period: Aug 1, 2026 - Jul 31, 2027
Match filter group: All

	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

- If enabled by scheduler, last page could include filters used for the exported file

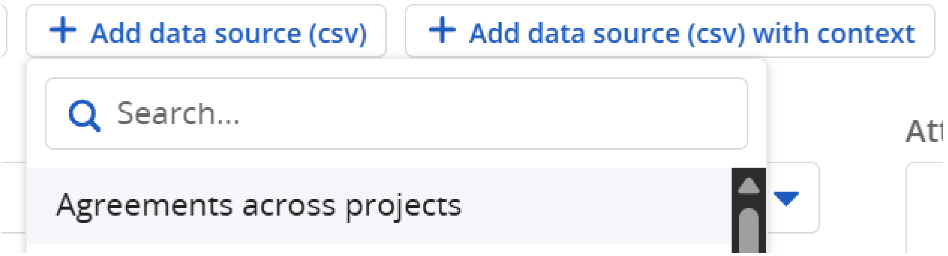
- All export instances are saved to Reports Library

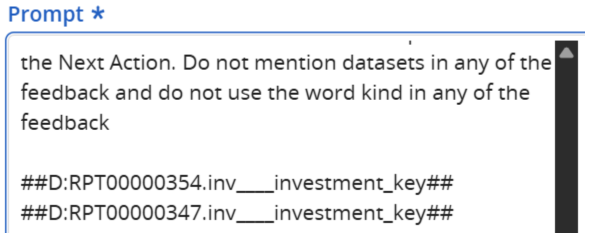


Reports and VAIA

Reports and Vaia

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



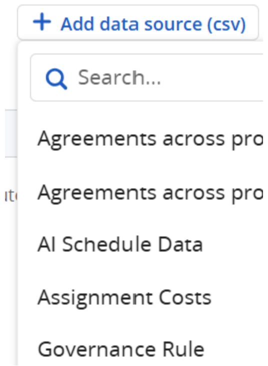


- In Report Designer, the AI Agents column reflects which agent(s) the report is used in

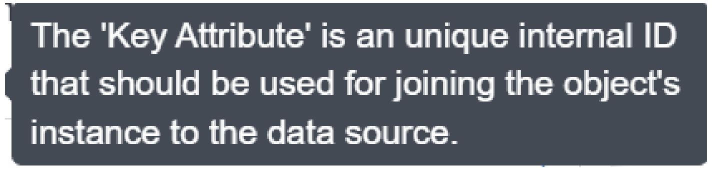
Name *	Layout Format	AI Agents
Status Summary Artifacts (Sample)	Data Extraction (CSV)	Generate Status Narrative in Status Report

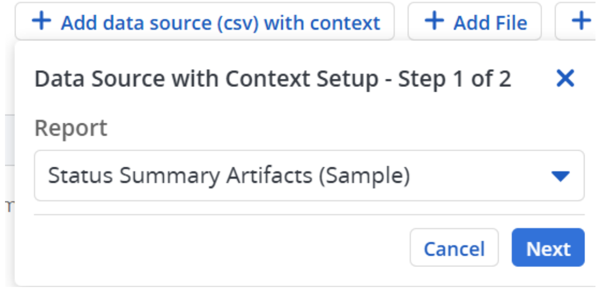
Reports and Vaia

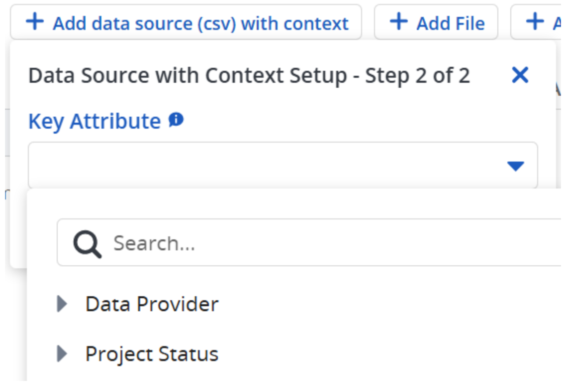
- Add data source (csv):
  - Pull the reports data as is, with the report's own filter, security, period setting



- 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







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?

Survey

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