

# Clarity Express – Guide

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1. Contents

- 1. Contents ..... 2
- 2. Document Revision History ..... 3
- 3. Purpose..... 4
- 4. Setup Guide ..... 4
  - 4.1 Supported Versions ..... 4
  - 4.2 Access Rights and Permissions ..... 4
  - 4.3 Using API Keys (Optional) ..... 5
- 5. User Guide ..... 7
  - 5.1 Login ..... 7
    - Non-SSO ..... 7
    - SSO ..... 8
  - 5.2 Navigation and Functionality..... 8
    - Main Menu ..... 8
    - Settings..... 9
    - Grid Functionality ..... 10
      - Select grid columns ..... 13
      - Properties View ..... 13
- 6. Modules..... 15
  - 6.1 My Workspace..... 15
    - Checklists, Smart Lists and To Dos..... 16
    - Action Items ..... 18
  - 6.2 Projects..... 19

## 2. Document Revision History

Version	Date	Name	Description
1.0	06/13/2023	Rego Consulting	Document Creation
1.1	03/16/2024	Rego Consulting	Version related updates User Guide

## Purpose

The Clarity Express Mobile App for Broadcom's Clarity PPM (Project Portfolio Management) software provides a rich mobile experience, allowing organizations to access Clarity on the go. This app enables users to leverage the latest Clarity functionality through REST API and a streamlined experience using the Modern UX. Intended for “in the field” Work Management, with Clarity Express, you can:

- Login to AWS (Amazon Web Services) or GCP (Google Cloud Platform) environments, supporting SSO enabled environments
- Manage Checklists
- View and Create To Dos
- Interact with Action Items
- Navigate through your investments and related modules

This application is available for free in the iOS and Android app stores. Please note that for view-only Clarity users to use the mobile app, additional configuration is required. The user setup and additional configuration are easy to set up and manage through the Clarity Application.

## Setup Guide

### Supported Versions

Clarity Express supports Clarity 16.0.3 or higher versions, functionality is based on your Clarity version and some options might not be available.

## Access Rights and Permissions

For users to access the functionality provided by the app, users must have the necessary access rights. We highly recommend assigning the following rights through a Security Group for seamless access to the functionality both via the web version and mobile application.

- The following access rights are required for “My Workspace”:

Access Right	Description
Account Settings – Navigate	Allows Access to the Account Settings page.

<b>API – Access</b>	Grants access to REST API. This right is required to run an application utilizing the REST API. A user must have the appropriate application rights to view or update specific functional areas.
<b>Checklist – Create</b>	Allows user to create Checklists.
<b>My Workspace – Navigate</b>	Allows user access to the “My Workspace” pages in the new user experience. Security applies to which Checklists a user can interact with from “My Workspace”
<b>To Do – Create – All</b>	Allows user to create To Dos in the new user experience for which the user has access to view associated objects.
<b>To Do – Delete – All</b>	Allows user to delete all To Dos in the new user experience for which the user has access to view To Dos and to view associated objects.
<b>To Do – Edit – All</b>	Allows user to view and edit all To Dos in the new user experience for which the user has access to view associated objects.
<b>To Do – Navigate</b>	Allows user access to the To Do pages in the new user experience.
<b>To Do – View – All</b>	Allows user to view all To Dos in the new user experience for which the user has access to view associated objects.
<b>Resource – View – All</b>	Allows user to view all resources and their information except the financial properties of the resource. This right is dependent on Resource – Navigate being granted.

- “Projects” will use the native permissions from Clarity allowing users to only view and/or edit instances they have access to. Please note FLS support is not available yet.

## Using API Keys (Optional)

Clarity Express also allows users to leverage API Keys, making the authentication experience more seamless. When the app is using API Keys to authenticate, it will not prompt users for credentials when their previous session has expired. Otherwise, if disabled, users will get prompted to login when the previous session has expired.

To use API Keys, the Clarity administrations will need to create an API Client as per Clarity’s functionality. The application generates and uses Personal API keys on a per user basis. This means an API Key will match the corresponding user’s access rights and settings.

To create an API Client, Follow these steps:

1. Log in to Clarity MUX (Modern UX).
2. From the left-side main menu, click **Administration**.

3. Click **Authentication & Keys**.
4. Click **CLIENTS**.
5. Click **Add Row** to define a new client.
  - a. The following values must be used to match the screenshot below:

Code	clarity_express
Name	ClarityExpress
Active	Checked

Code *	Name *	Active *
<input type="checkbox"/> clarity_express	ClarityExpress	<input checked="" type="checkbox"/>

If at any point the functionality needs to be disabled, clear the **Active** checkbox, the client is now inactive, and all keys created by all users for that client are temporarily disabled. Users cannot generate new keys while a client is disabled. When the administrator reactivates the client, the previous keys start working again.

For additional details, refer to:

<https://techdocs.broadcom.com/us/en/ca-enterprise-software/business-management/clarity-project-and-portfolio-management-ppm-on-premise/16-0-3/reference/Clarity-REST-APIs/REST-API-Authentication.html>

## User Guide

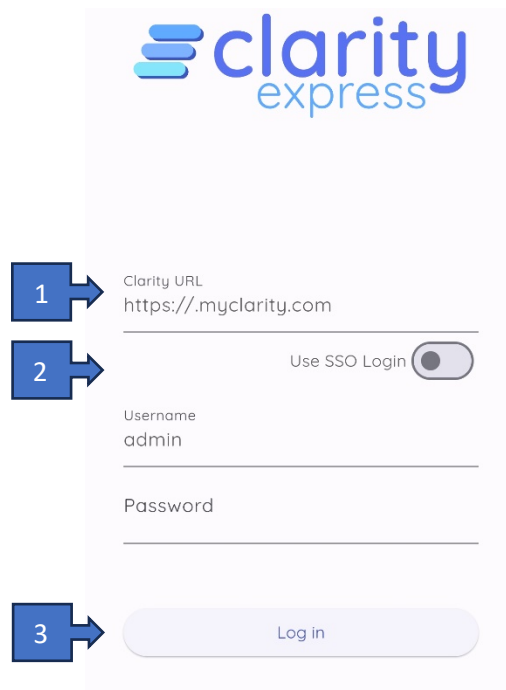
### Login

Upon first use of the application, the application will prompt login information. Clarity Express supports SSO and Non SSO login options.

Please note, that after a session timeout, login might be requested again unless the app is configured to use API Keys.

#### Non-SSO

- 1) "Clarity URL", type down your Clarity URL, it must start with **https://**, given we only support secure environments.
- 2) Leave the toggle for "Use SSO Login" and key in your "Username" and "Password". This password must match the application password.
- 3) Once all information is configured, click on "Login In" to access the application.



The image shows a screenshot of the Clarity Express login interface. At the top, the Clarity Express logo is displayed. Below the logo, there are three input fields and a toggle switch. The first field is labeled "Clarity URL" and contains the text "https://.myclarity.com". The second field is labeled "Username" and contains the text "admin". The third field is labeled "Password" and is empty. To the right of the Username field is a toggle switch labeled "Use SSO Login" which is currently turned off. Below the input fields is a "Log in" button. Three blue callout boxes with white numbers and arrows point to the Clarity URL field (1), the Username field (2), and the Log in button (3).

## SSO

- 1) "Clarity URL", type down your Clarity URL, it must start with **https://**, given we only support secure environments.
- 2) Enable the toggle for "Use SSO Login".
- 3) Click on "Login in with SSO" this will open your SSO login page through a browser window, once SSO is completed it will load the application as expected.



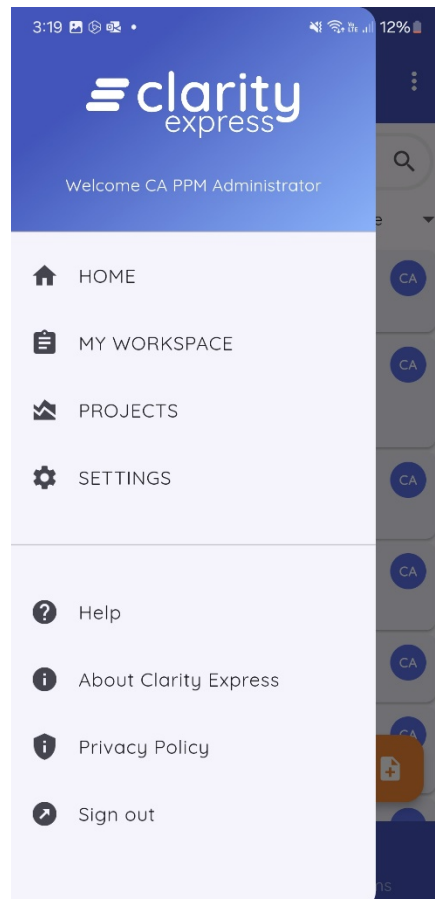
## Navigation and Functionality

Once logged in to the application, navigating Clarity Express is intended to be a seamless experience with mobile friendly layout and functionality that Clarity supports natively. The sections below will walk you through the basics on how to get around the application.

### Main Menu

- 1) Upon login the "Home" page will be defaulted to "Checklists", clicking on the "hamburger" icon on the upper left corner will open the main menu.





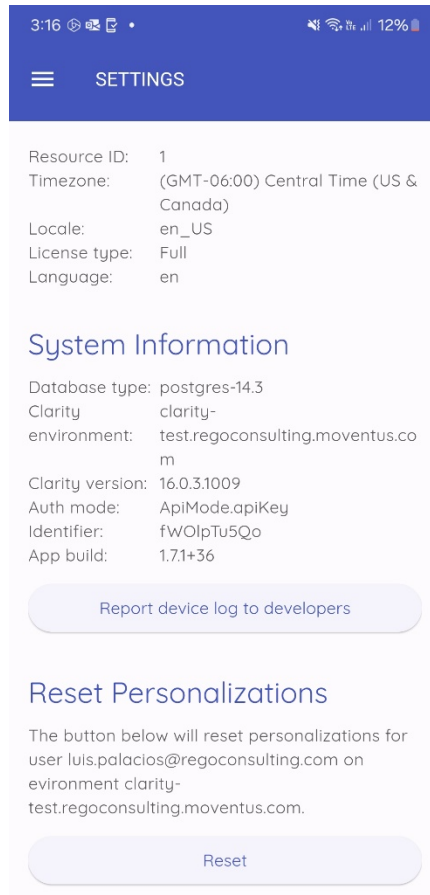
2) The main menu will contain the following options:

- a. Home – will navigate to the home page, by default this is set to “Checklists” but can be modified by the user by selecting “Set this screen as Home” on the screens that allow for it.
- b. My Workspace – will navigate to the Work Management module which allows users to interact with: Checklists, Smart Lists and Action Items
- c. Projects – will navigate to the Project grid view, allowing users to view and/or edit Projects and related modules.
- d. Settings – provides application information and functionality to: Contact Support, Clearing User Preferences, etc.
- e. Sign Out – will close the session and delete and persistent information like the related login details and/or API Key.

## Settings

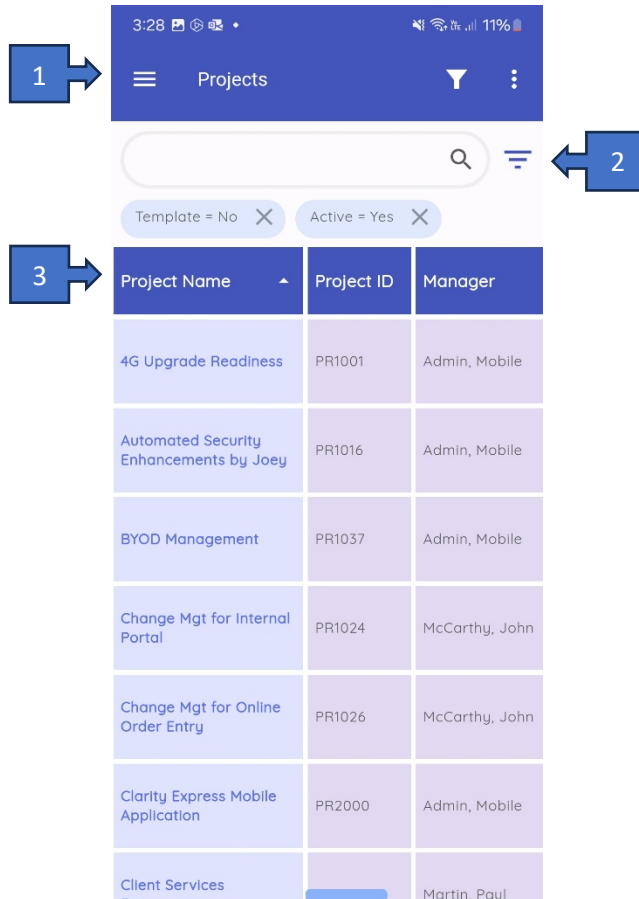
Under “Settings” users will be able to:

- 1) Visualize Session and System Information, by clicking on “Report device log to developers” the default will open your default email client to provide details to our support team.
- 2) Clicking on “Reset” will reset all personalizations, including Home Page, Grid and View configuration.



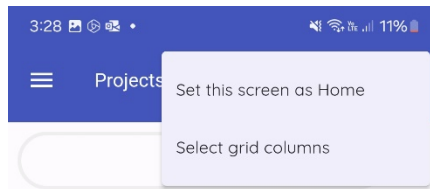
## Grid Functionality

When navigating through the application, users will be able to visualize their data through Clarity Express’ grid display. The functionality below is available for most grids and upon personalization it will be saved as user configuration for this specific environment (see “Reset Personalizations”).

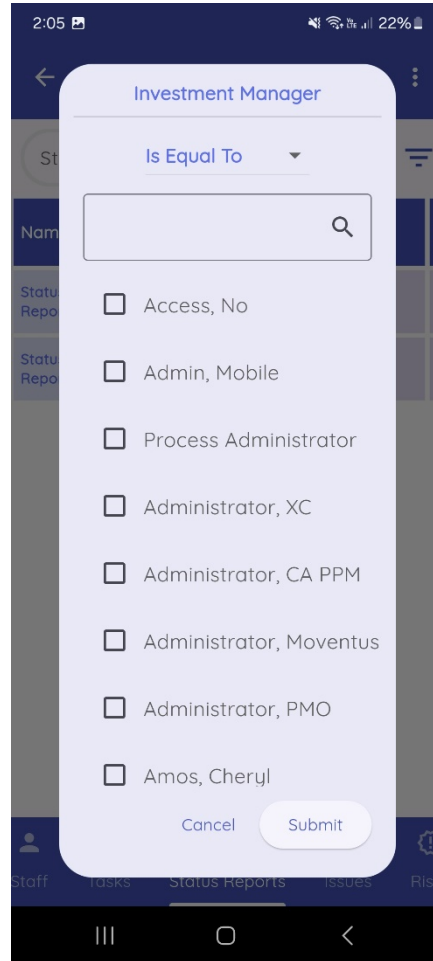


1) The header will display:

- a. Filter Toggle – allows users to show/hide the filter section. This section is automatically hidden on devices supporting horizontal view.
- b. Context Menu/Ellipsis – will display the available options for the screen/grid.
  - i. Selecting “Set this screen as Home” will set the screen as the “Home” screen.
  - ii. Selecting “Select grid columns” will allow you to customize the grid.



- 2) The Filter area will display:
  - a. Search Box – works similar to the filter box in Clarity. Allowing users to search using free text on the Code and Name fields of the object.
  - b. Filter Icon – will display a list of all filterable fields, upon selection of a field the users will be able to filter by that field depending on field type. (See screenshots below)

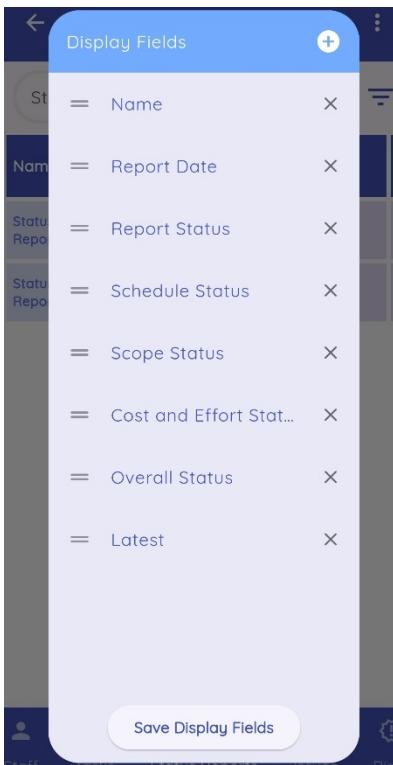


- c. Breadcrumbs – will display all active filters on the current view, by clicking on the “x”, users will be able to clear the filter.
- 3) The Grid section displaying the data will allow users:
  - a. To always freeze the first column selected, which we recommend being a unique identifier or name of the instance
  - b. Click on the headers to sort ascending and descending based on the selected field
  - c. Scroll horizontally to visualize additional columns

## Select grid columns

For those grids that allow the grid layout to be personalized, the context menu will have the option “Select grid columns”.

- 1) After clicking on the option, the user will see all selected fields on the current grid view.
- 2) Clicking on the “+” icon on the upper right corner will display all available columns.
- 3) Once a column is added, columns can then be:
  - a. Reordered – by selecting the icon on the left of each column name and dragging
  - b. Remove a column – by tapping the “x” icon on the right side of each column
- 4) To save the changes, tap on “Save Display Fields”.

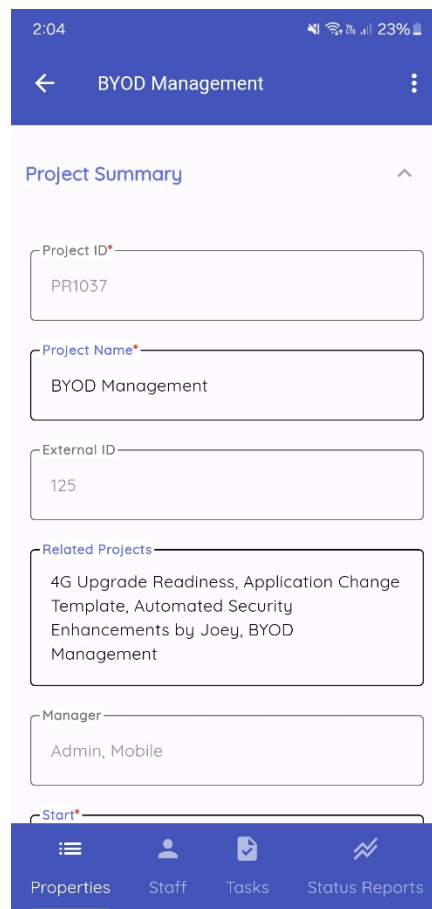


## Properties View

Clarity Express will also allow users to navigate to the details of each instance under the “Project” module. Depending on the type of object the instance belongs to. Instances will be displayed with sections (as per the instance’s blueprint) or as a basic form.

- 1) When editing an instance:
  - Required fields will display a red asterisk “\*” next to the field label.
  - Read only fields will be greyed out.

- When selecting a field for editing:
  - o UI will provide components depending on the field type:
    - Calendar for date fields
    - Popup window for lookups
    - A textbox for text-based fields
- Upon editing a field, it will automatically save the instance.
- 2) For Blueprint based views, the fields will be displayed:
  - a. Sections – can be collapsed or expanded as needed. Please note Business Rules are not supported currently.
  - b. Fields – will be displayed in the same order as the blueprint.



- 3) For those objects that don't support a blueprint, the fields will be displayed matching the grid columns from left to right as a top to bottom layout (see sample screenshot below for Tasks).

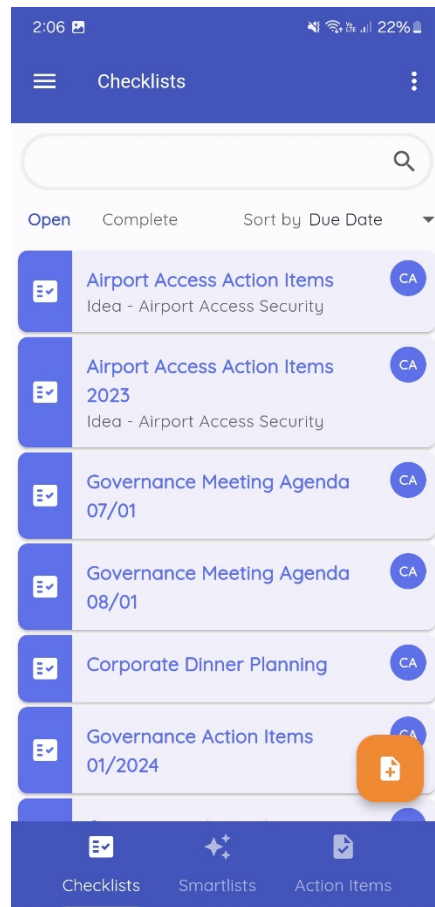
The screenshot shows a mobile application interface for 'Task Details'. At the top, there is a blue header with a back arrow, the text 'Task Details', and a three-dot menu icon. Below the header, the task name 'Closing Phase Gate Complete' is displayed in a white box with a blue border. The 'WBS Sort' field contains the value '25'. The 'Start' and 'Finish' fields both contain the date 'Aug 4, 2023'. The 'Milestone' field contains the value 'Yes'. The 'Status' field contains the value 'Not Started'. The 'Actuals' and 'ETC' fields both contain the value '0.00'. The status bar at the top of the phone shows the time as 2:05, signal strength, Wi-Fi, cellular service, and a battery level of 22%.

## Modules

### My Workspace

On the “My Workspace” module, users will be able to navigate the following options by using the bottom menu:

- Checklists
- Smart Lists
- Action Items



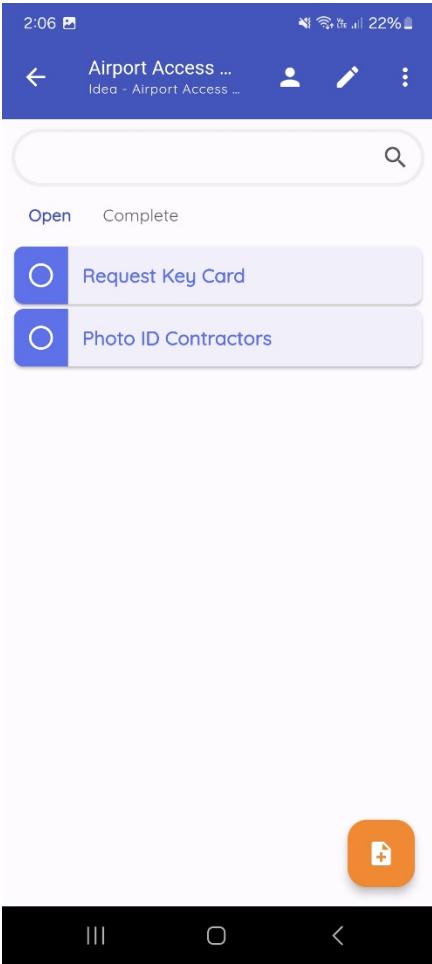
## Checklists, Smart Lists and To Dos

- 1) Users can navigate existing Checklists and To Dos by selecting the corresponding filter. This list can be further filtered using the top-level filter section.
- 2) Clicking on the left icon for a Checklist will complete the checklist.
- 3) Users can also create a new Checklist by clicking on the orange icon on the lower right corner.

## When navigating a Checklist or Smart List

- 1) For Checklists, the header section will allow users to:
  - a. Collaborators Icon – View and/or modify the current list of collaborators
  - b. Edit Icon – Edit the Checklist properties
- 2) On the To Do list, users can click on the “circle” icon next to an item to complete it or on the “orange” icon to create a new To Do





3) Clicking on a To Do will open the Properties view and allow users to edit the corresponding item.

2:06 [location icon] [signal strength] [Wi-Fi] [cellular] 22%

← Edit Todo [trash icon]

Name  
Request Key Card

---

ID: 5029032

Due Date  
Not set

Owner  
None

Completed

Blocked

Link

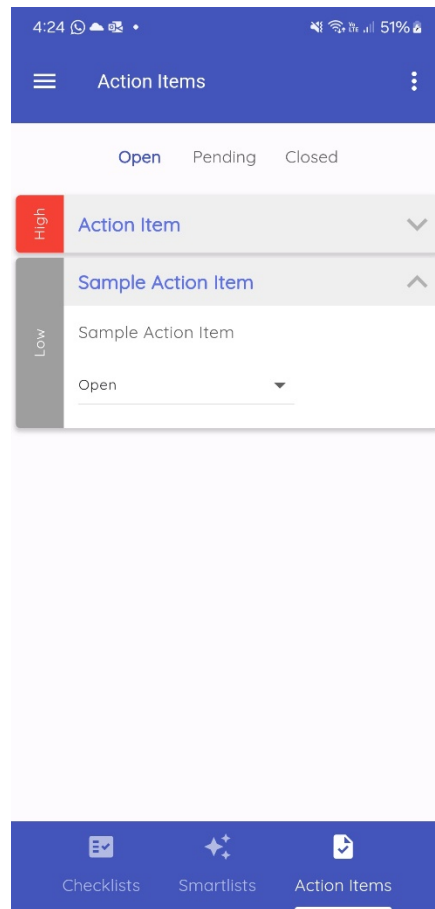
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Save Changes

### Action Items

Clarity Express also allows users to navigate their Clarity Action Items. When navigating to “Action Items”

- 1) Users can switch between Open, Pending, and Closed Action Items
- 2) The Action Item will display the item’s Priority and Title on the collapsed view.
- 3) By clicking on the title, the Action Item will expand and display the description.
- 4) The drop down at the bottom of the description will allow users to update the Action Item by choosing one of the available responses.



## Projects

The “Projects” module will allow users navigate Projects based on their access rights. The module will load into the grid view and allow the functionality described in the “Navigation” section.

Once the user navigates into a specific project, they will be able to use the bottom menu to navigate across:

- Properties – Blueprint based section/field display.
- Staff – list the Staff members of the project and allow the instances to be edited.
- Tasks – list the project tasks and allow the instances to be edited.
- Status Reports – list the project related instances and allow the instances to be edited.
- Risks – list the project related instances and allow the instances to be edited.
- Issues – list the project related instances and allow the instances to be edited.

