

VISUALS

Search...

% COMPLETE

BUDGET REMAINING

BUDGET SPENT

DAYS REMAINING

DAYS TO START

EFFORT REMAINING

EFFORT SPENT

Project Name

TIMELINE



NEXT MILESTONE



BUDGET REMA...



EFFORT REMAIN...

MODULES

Extending the value of Clarity PPM
with pre-built components

Pemari Consulting Ltd

Andrew Litton

2007 - TODAY

About Me

I have been working in the Project Management Software consulting business since 1993, starting with Artemis, and then onto ABT, Niku and through it's rebranding to today and Clarity PPM.



Extending the value of Clarity PPM with pre-built components

Why Extend

- Clarity PPM is feature rich but no two companies are exactly the same
- Requirements for Clarity PPM differ
- Not all features necessary to make your daily work easier are available in Clarity PPM

Extending the value of Clarity PPM with pre-built components

How to Extend

- Don't and live with the capabilities as they are
- Build your own
- Benefit from available add-ons and support

Session Agenda

Extending the value of Clarity PPM with pre-built components



Simplify

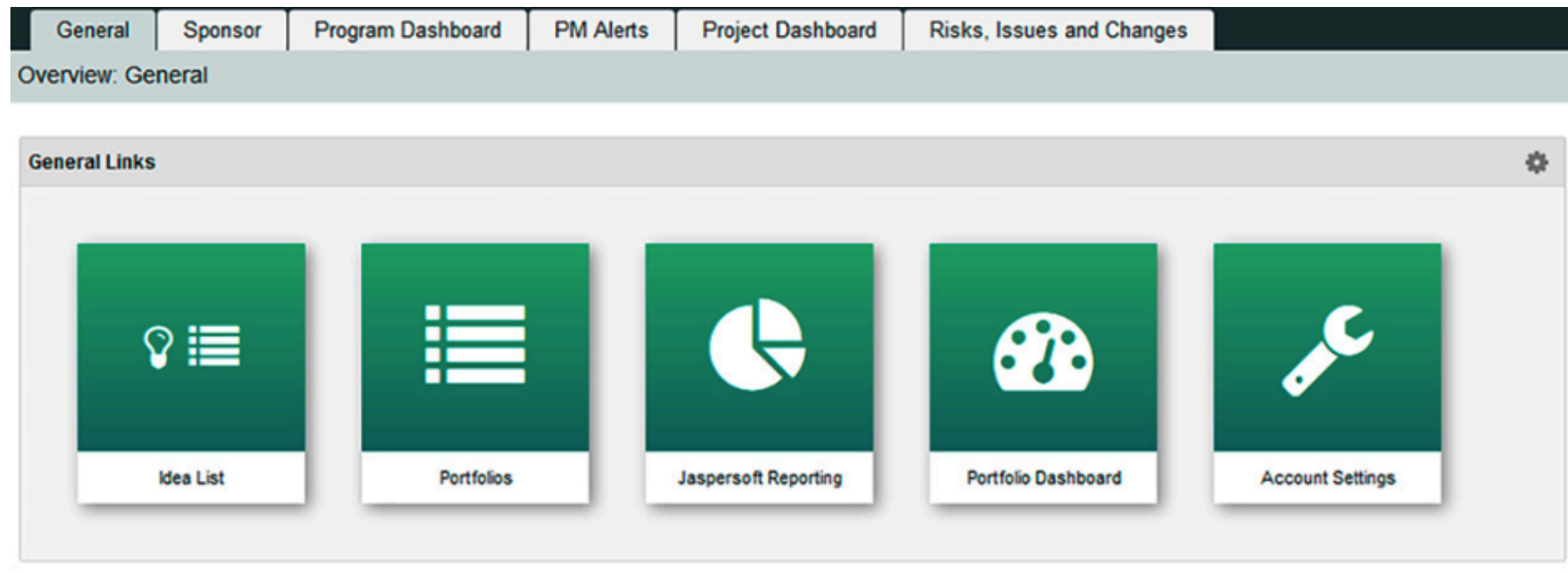
Access Data

Integrate

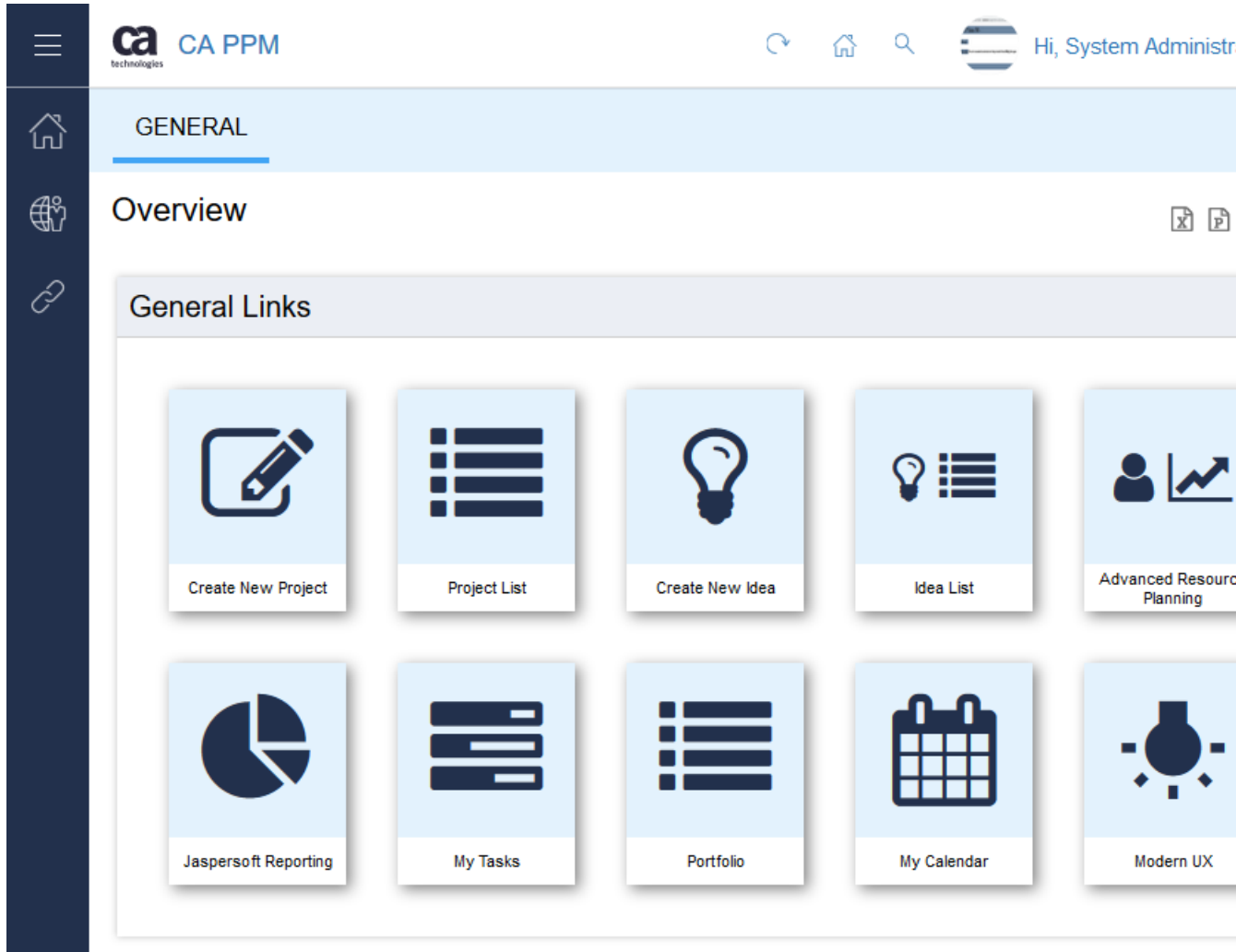
Simplify

Intuitive Navigation in Clarity PPM

- Simplify access to Clarity PPM capabilities with tiles



Navigation Tiles: General



- One-Click Navigation to Pages and Subpages
- Better User Experience
- Graphical visualization of navigation links in CA PPM

Navigation Tiles: General

The screenshot displays a web application interface with a dark blue sidebar on the left containing icons for home, overview, and links. The main content area is titled 'GENERAL' and 'Overview'. Below this is a 'General Links' section containing a grid of ten navigation tiles. Each tile features an icon and a label: 'Create New Project' (pencil icon), 'Project List' (list icon), 'Create New Idea' (lightbulb icon), 'Idea List' (lightbulb and list icon), 'Advanced Resource Planning' (person and chart icon), 'Jaspersoft Reporting' (pie chart icon), 'My Tasks' (server rack icon), 'Portfolio' (list icon), 'My Calendar' (calendar icon), and 'Modern UX' (sun icon).

A great number of possibilities:

- Create new Projects/Ideas/...
- Open:
 - (Sub-) Pages
 - Lists
 - Reports
- Call Actions
- Call URLs with context specific parameters

Navigation Tiles : Projects

The screenshot displays a web interface for project management. At the top left, there is a dark blue sidebar with icons for home, search, and other functions. The main header area includes the CA PPM Technologies logo and a user greeting 'Hi, System Adm'. Below the header, a light blue navigation bar is labeled 'NAVIGATION'. The main content area is titled 'Project: A Cloud Migration' and features a 'Project Navigation' section with a grid of ten blue navigation tiles. Each tile contains an icon and a label: Overview (document icon), PMO (letter A icon), Team (group of people icon), Tasks (hierarchy icon), Gantt (Gantt chart icon), Financial Plan (banknote icon), Risks (warning triangle icon), Issues (list icon), Changes (puzzle piece icon), and Report (gauge icon).

Navigation within Objects

- Substitute the Tab and Subpage Navigation
- Link directly to Subobjects
- Link to other Websites like JIRA, SharePoint, ...

Navigation Tiles: Configuration

CA PPM technologies

Hi, System Administrator

Navigation Bar List

Filter: None

<input type="checkbox"/>	Name ▲	ID		Size X (Items per Row)	Size y (Rows)	Tiles Usage	#max Tiles	#Tiles	#Tiles Remaining	Background 1	Background Color 2	Item Color 1	Item Color 2	Item Width	Item Height	Item Icon Color	Item Icon Size	Item Title Font Size
<input type="checkbox"/>	General Links	z_user_homepage	☰	5	2	██████████	10	10	0	#FFFFFF		#E3F2FD		120	150	#22304c	0.8	8px
<input type="checkbox"/>	Mitarbeiter	z_Ma_Marketing_NavTiles	☰	4	1	██████	4	4	0	#F5F5F5	#F5F5F5	#e9ff00	#0aaa17	100	100	#ffffff	0.6	8px
<input type="checkbox"/>	PM User Homepage	z_pm_user_nav	☰	4	2	███████	8	6	2	#F5F5F5	#F5F5F5	#00a56b	#00635d	150	190	#ffffff	0.6	8px
<input type="checkbox"/>	Project Management	z_navbar_project	☰	5	1	██████	5	5	0	#F5F5F5	#F5F5F5	#2d4448	#2d4448	140	160	#ffffff	0.6	8px
<input checked="" type="checkbox"/>	Project Navigation	z_project_navigation	☰	5	2	██████████	10	10	0	#FFFFFF		#E3F2FD		120	150	#22304c	0.8	8px
<input type="checkbox"/>	Resource Management	z_navbar_resource	☰	5	1	██████	5	5	0	#F5F5F5	#F5F5F5	#44482d	#44482d	140	160	#ffffff	0.6	8px

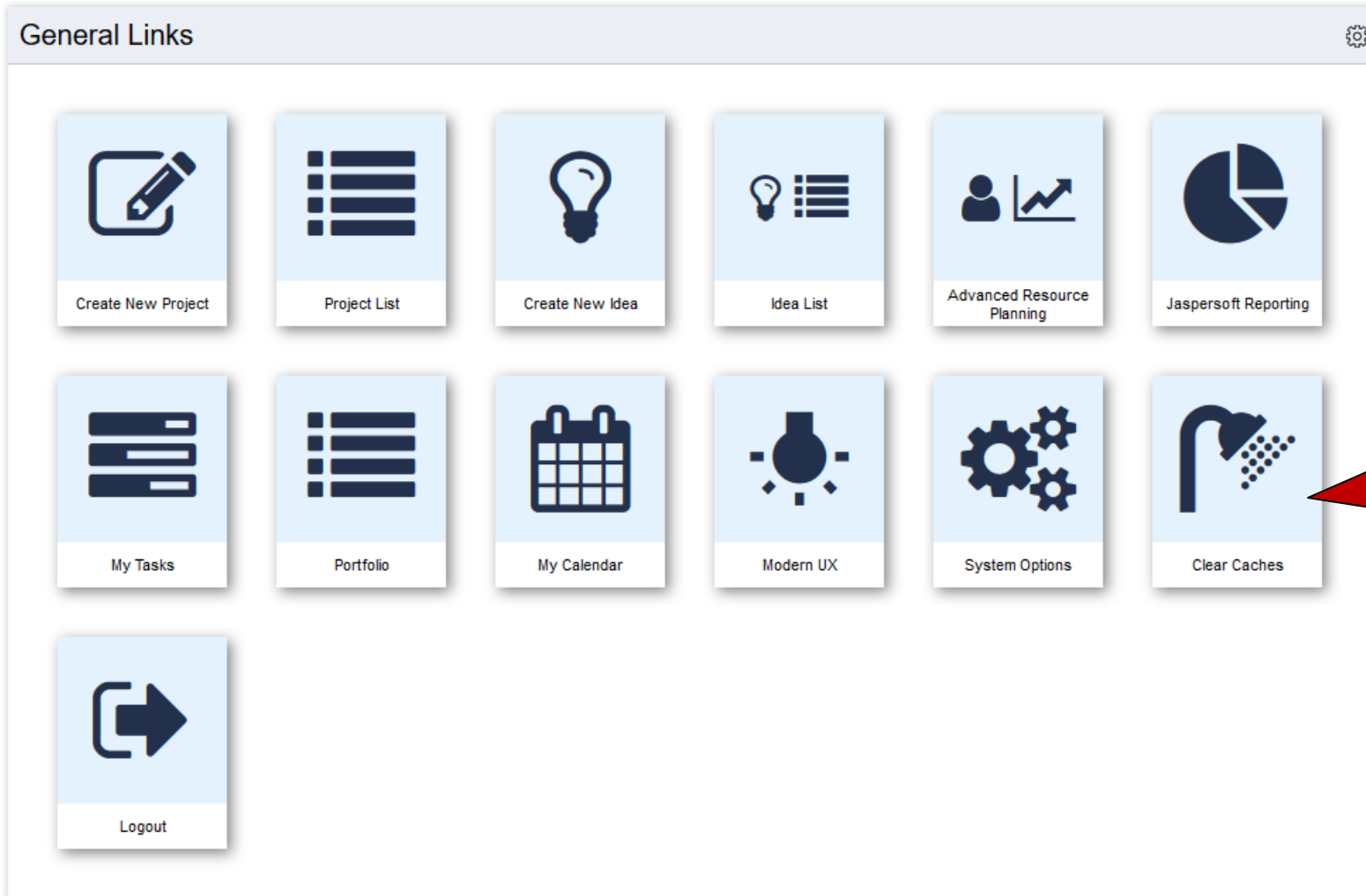
Project Navigation
Status: full
Progress: 10
Total: 10

SAVE NEW ITD NAVIGATION TILES DELETE

Displaying 1 - 6 of 6

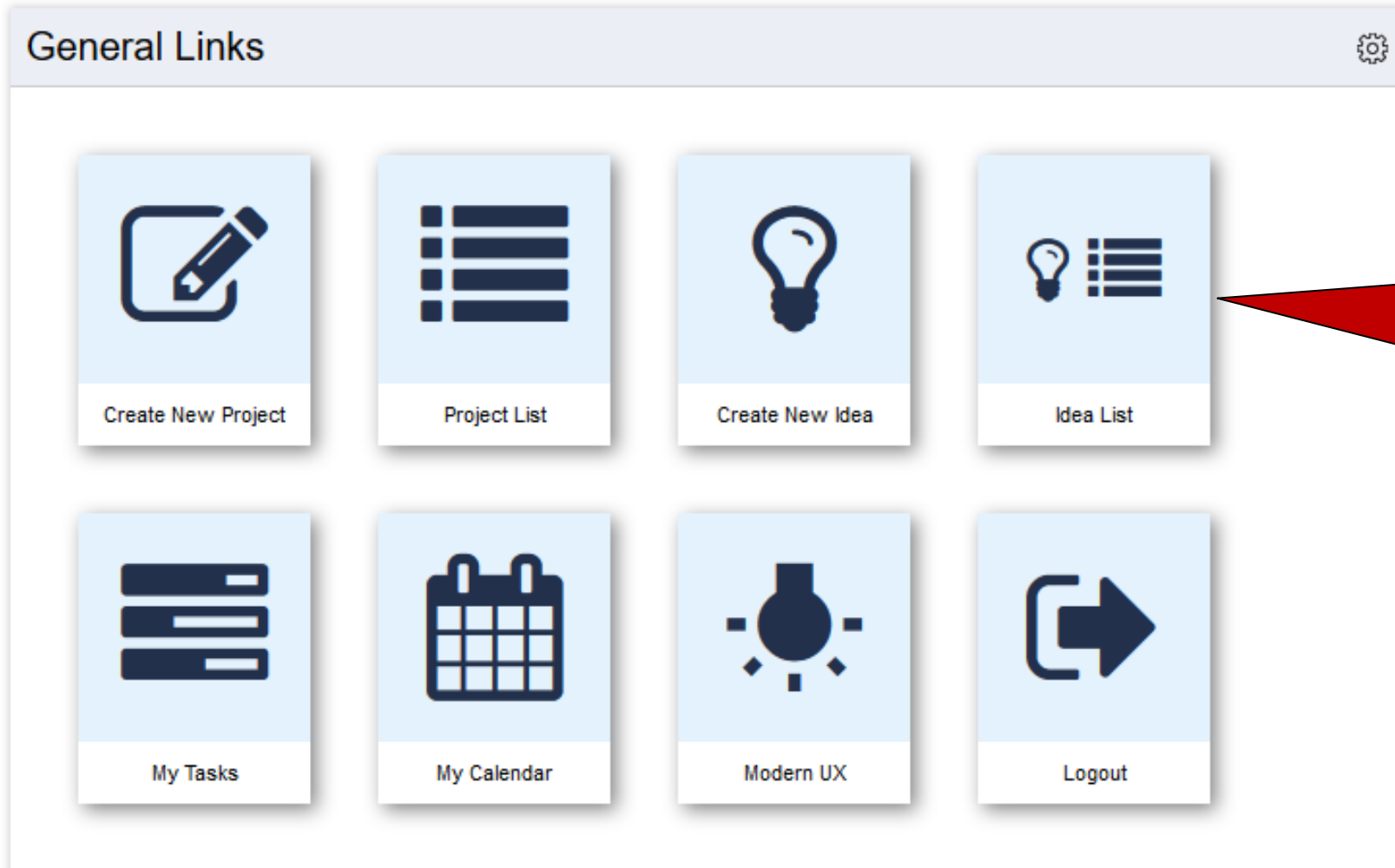
Quick and Easy configuration

Navigation Tiles: Permissions



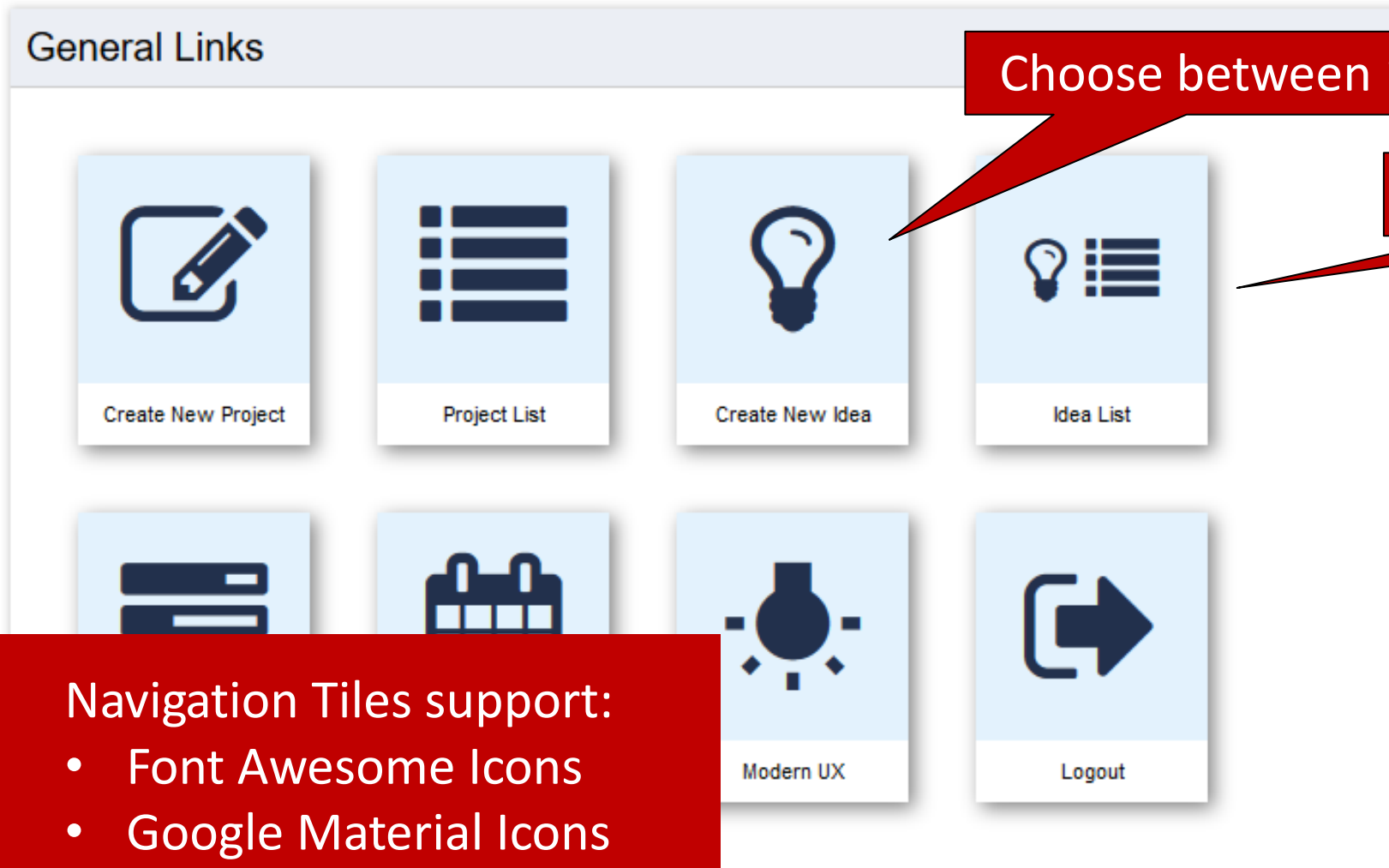
Permission specific appearance:
Admin User sees all of
the Navigation Tiles

Navigation Tiles: Permissions



Permission specific appearance:
Regular User only sees relevant Navigation Tiles

Navigation Tiles: Wide selection of icons

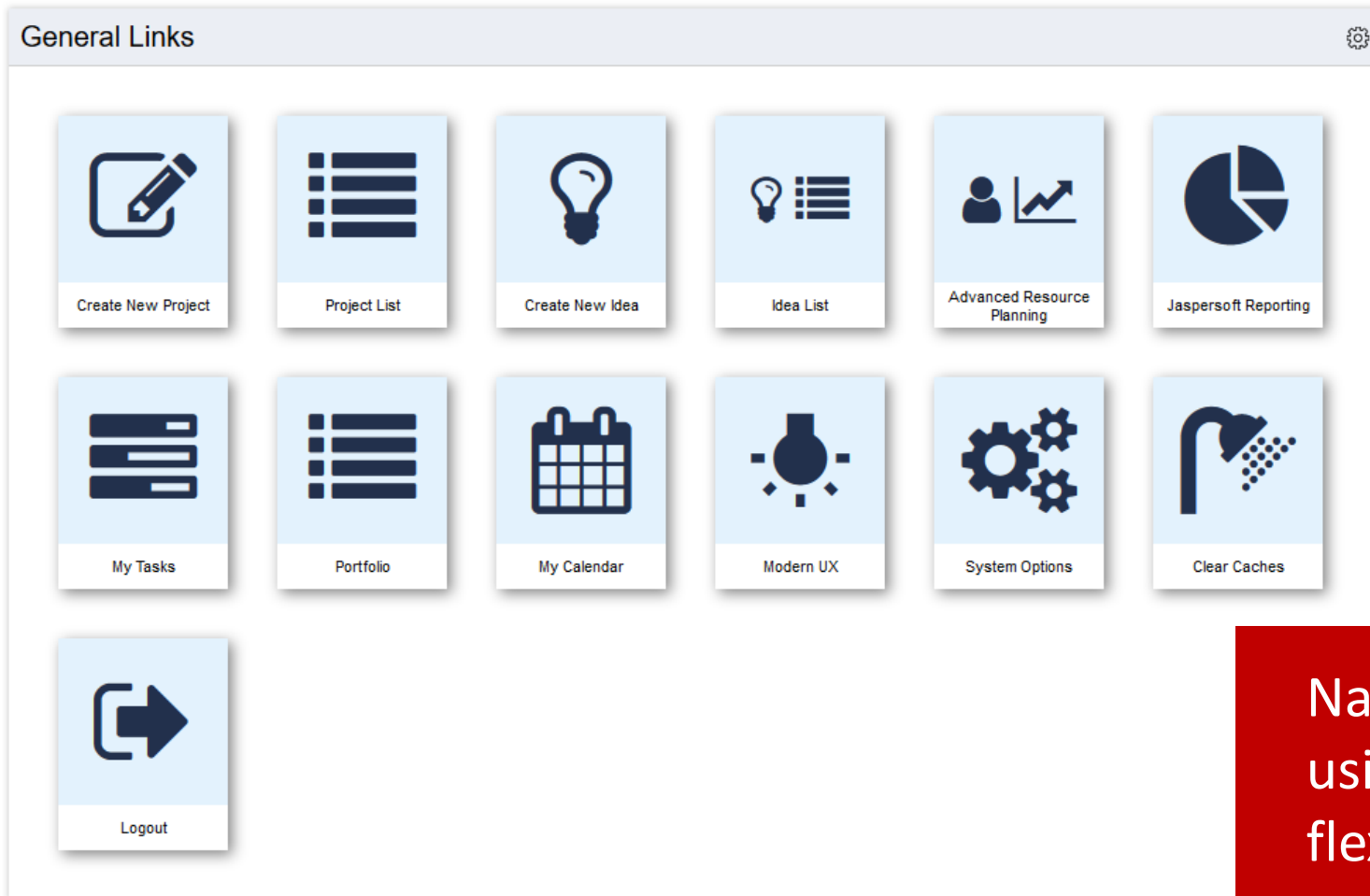


Navigation Tiles support:

- Font Awesome Icons
- Google Material Icons

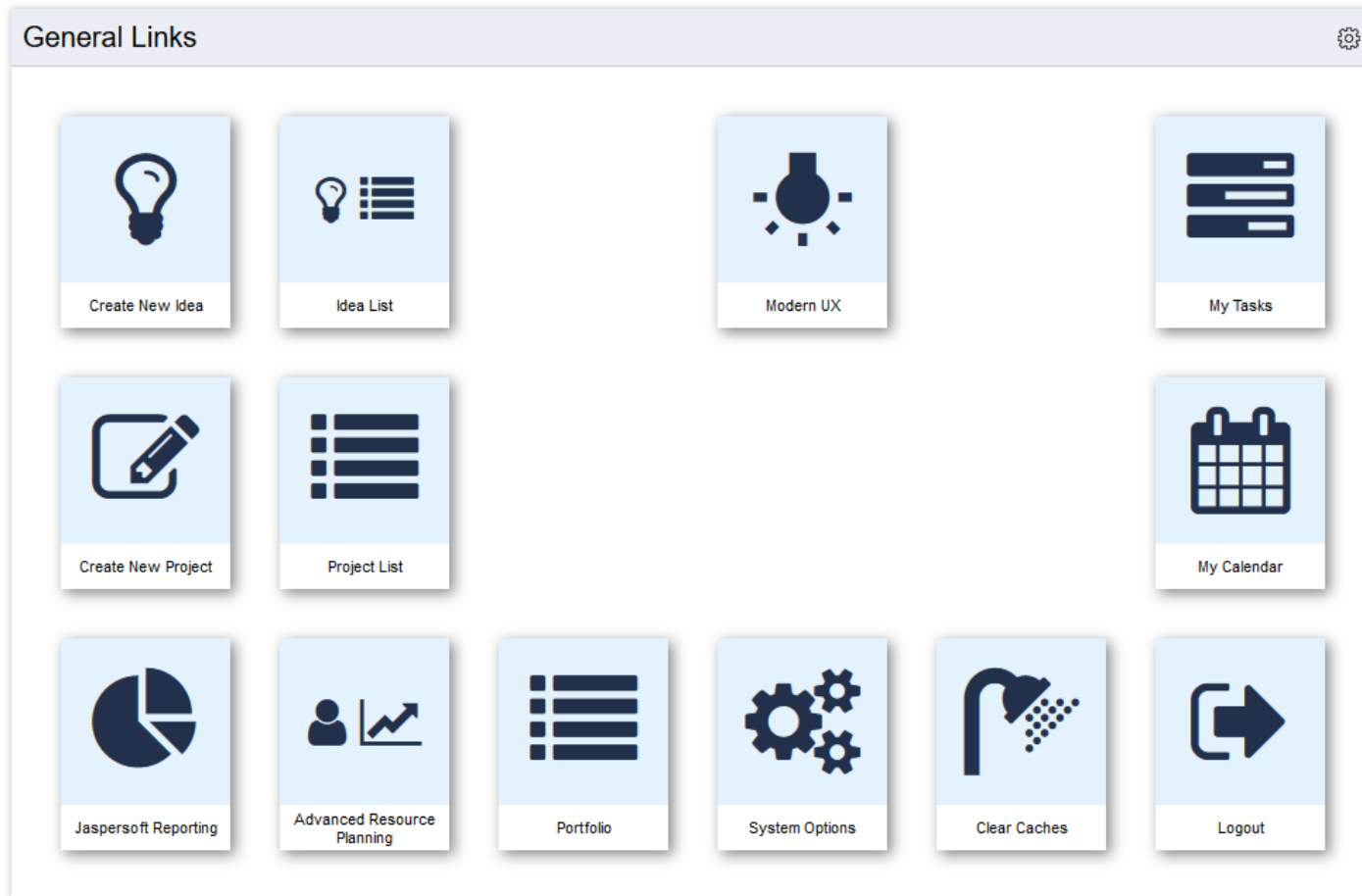


Navigation Tiles: Flexible and easy arrangement



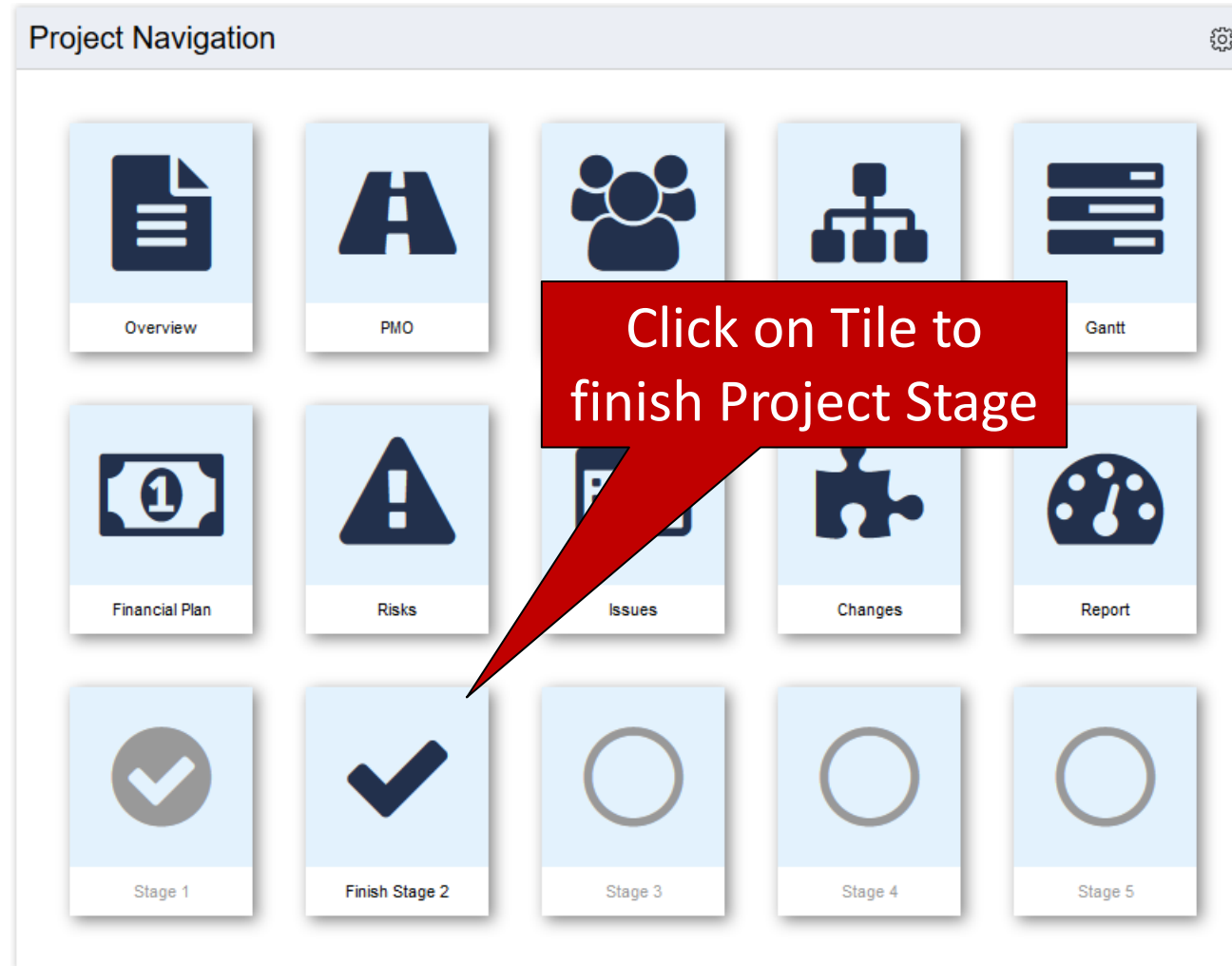
Navigation Tiles can be sorted for using the available space in a flexible way

Navigation Tiles: Flexible and easy arrangement

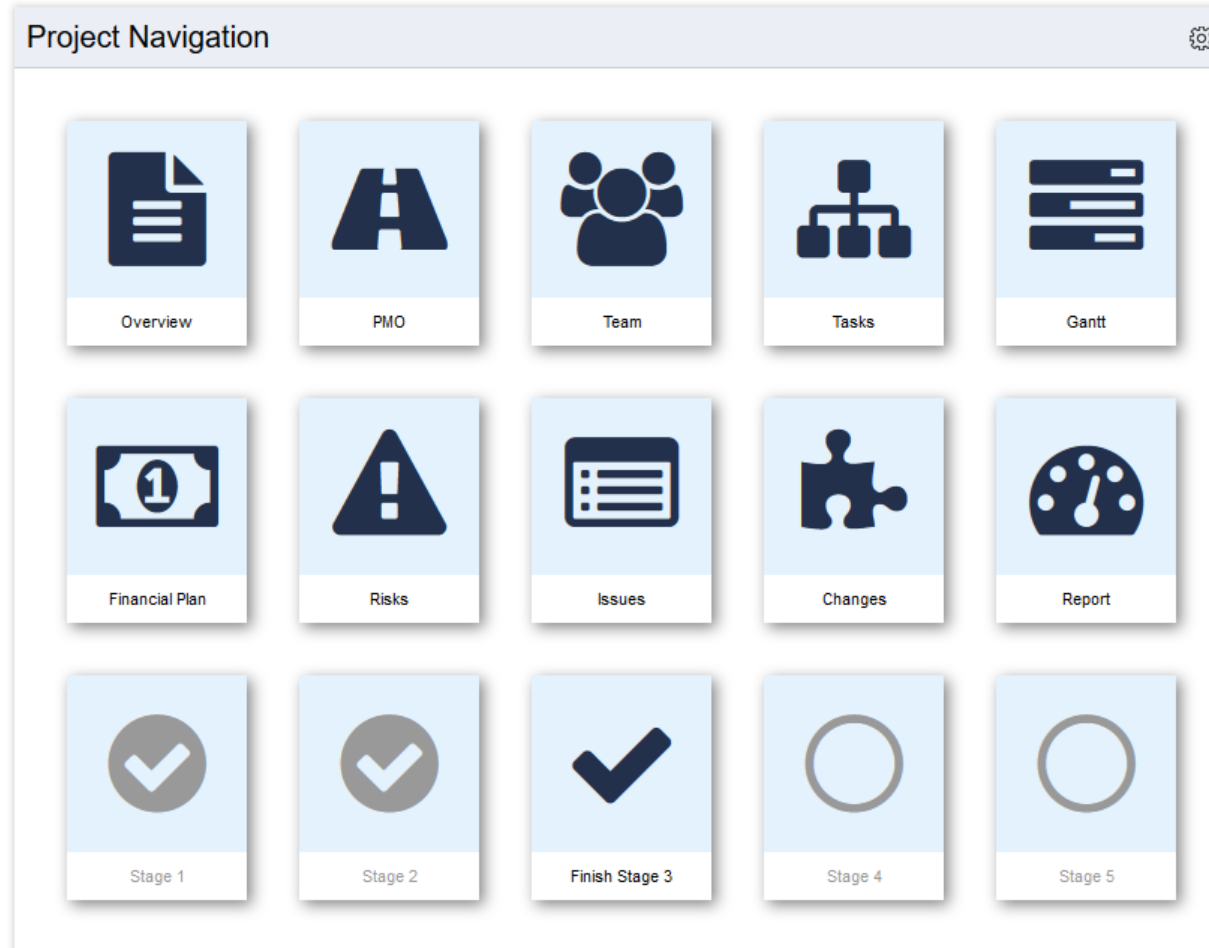


It is also possible to use a fixed position to group the Tiles

Navigation Tiles: Change tiles depending on Stage



Navigation Tiles: Change tiles depending on Stage



Navigation Tiles: Configure them yourself

- Texts and Links:

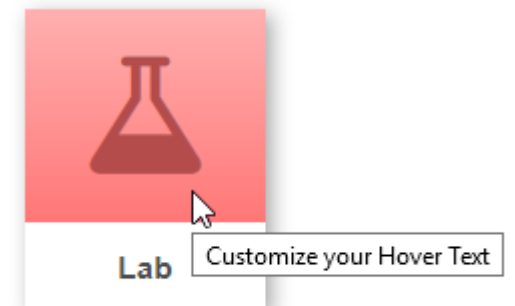
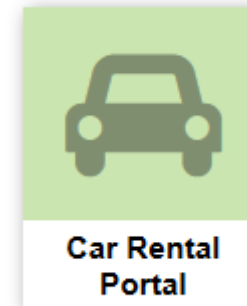
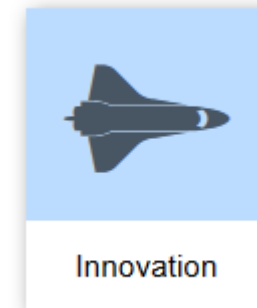
- Title
- URL
- Hover Text

- Security:

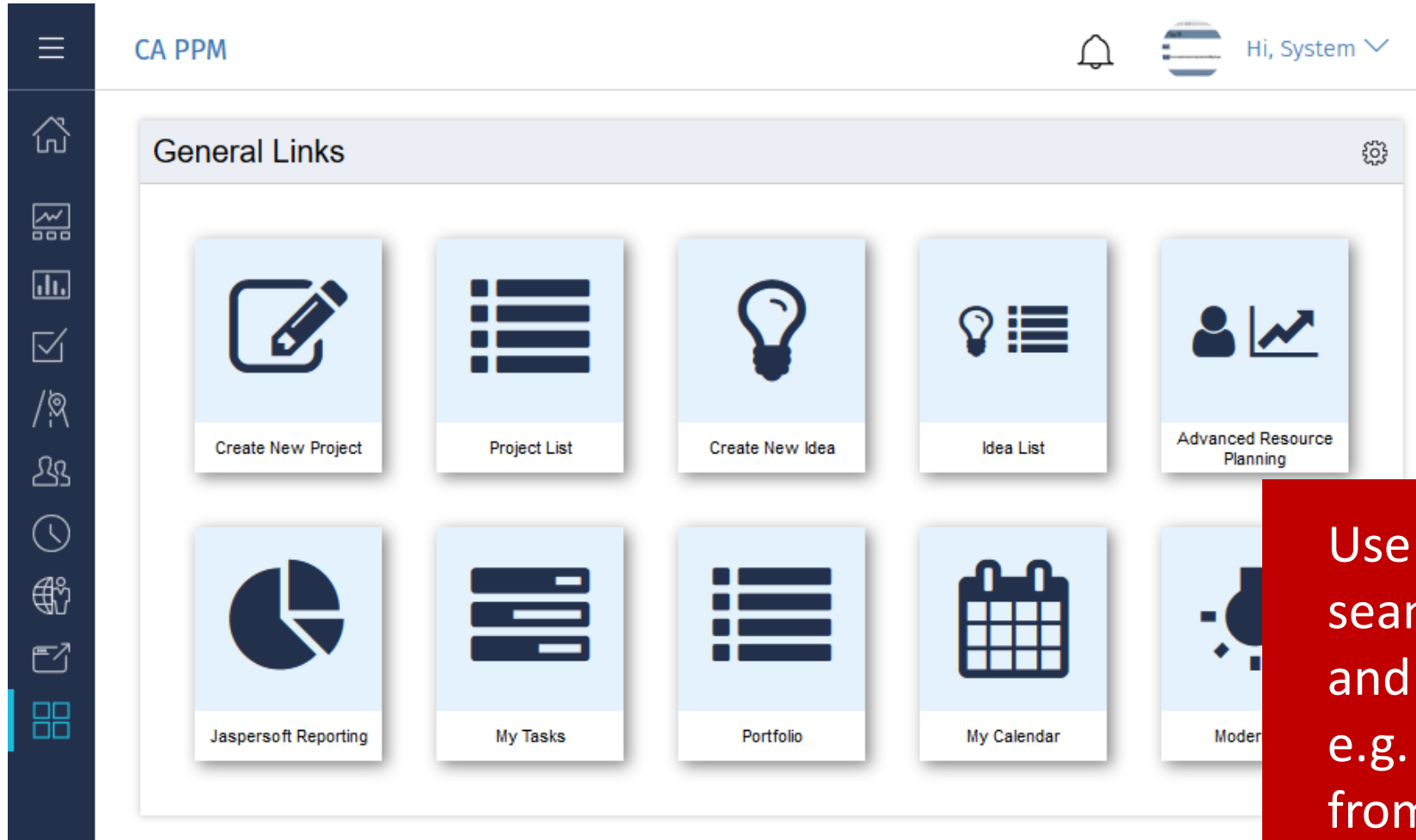
- Permissions

- The Look and Feel:

- Style
- Colors
- Position
- Icons
- Sizes



Navigation Tiles: Integrate Classic into Modern UX



Use Navigation Tiles to switch seamlessly between Classic UI and Modern UX
e.g. Jump to Kanban Board from Classic UI

Action Item Responder

- Easily respond to Clarity PPM Action Items directly within email

Here is the timesheet for **David Matzdorf** for the time period of **08/26/2017 - 09/01/2017**

Investment	Task	Sat 08/26	Sun 08/27	Mon 08/28	Tue 08/29	Wed 08/30	Thu 08/31	Fri 09/01	Total
Acme Development Project	Acme Development Project			3	3	1	5	3	15
Acme Development Project	Core Development			2	4	4	1	1	12
Acme Development Project	UI Development			1	1	3	1	1	7
Acme Development Project	Database Development			5	2	3	1	1	12
Acme Development Project	Testing			2	1	4	2	1	10
Total				13	11	15	10	7	56

Approve

Return

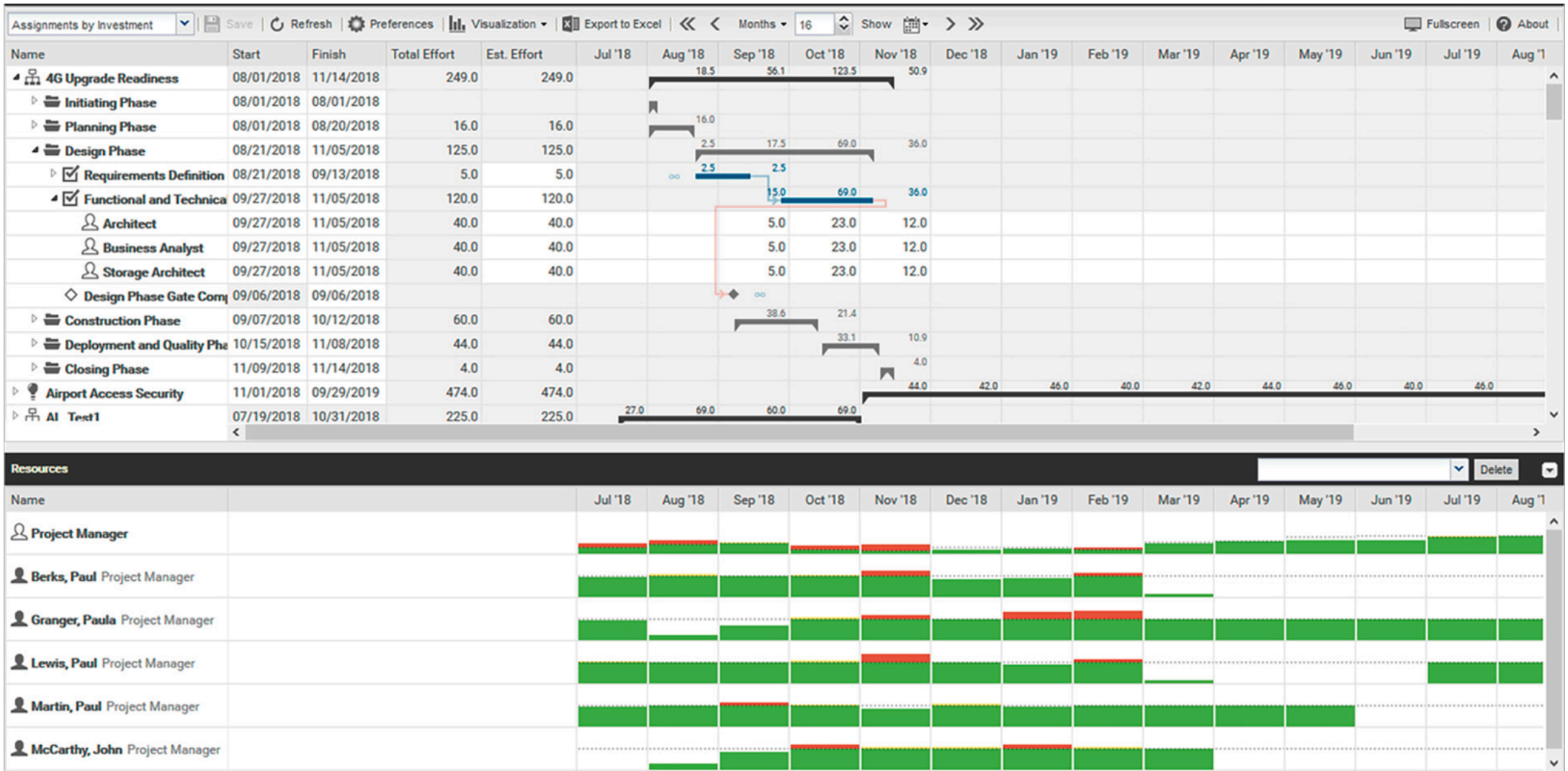
Action Item Responder

- Improve Action Item response times
- Simplifies dealing with Action Items for managers
- Works with any mail client
- Supports adding Notes to response

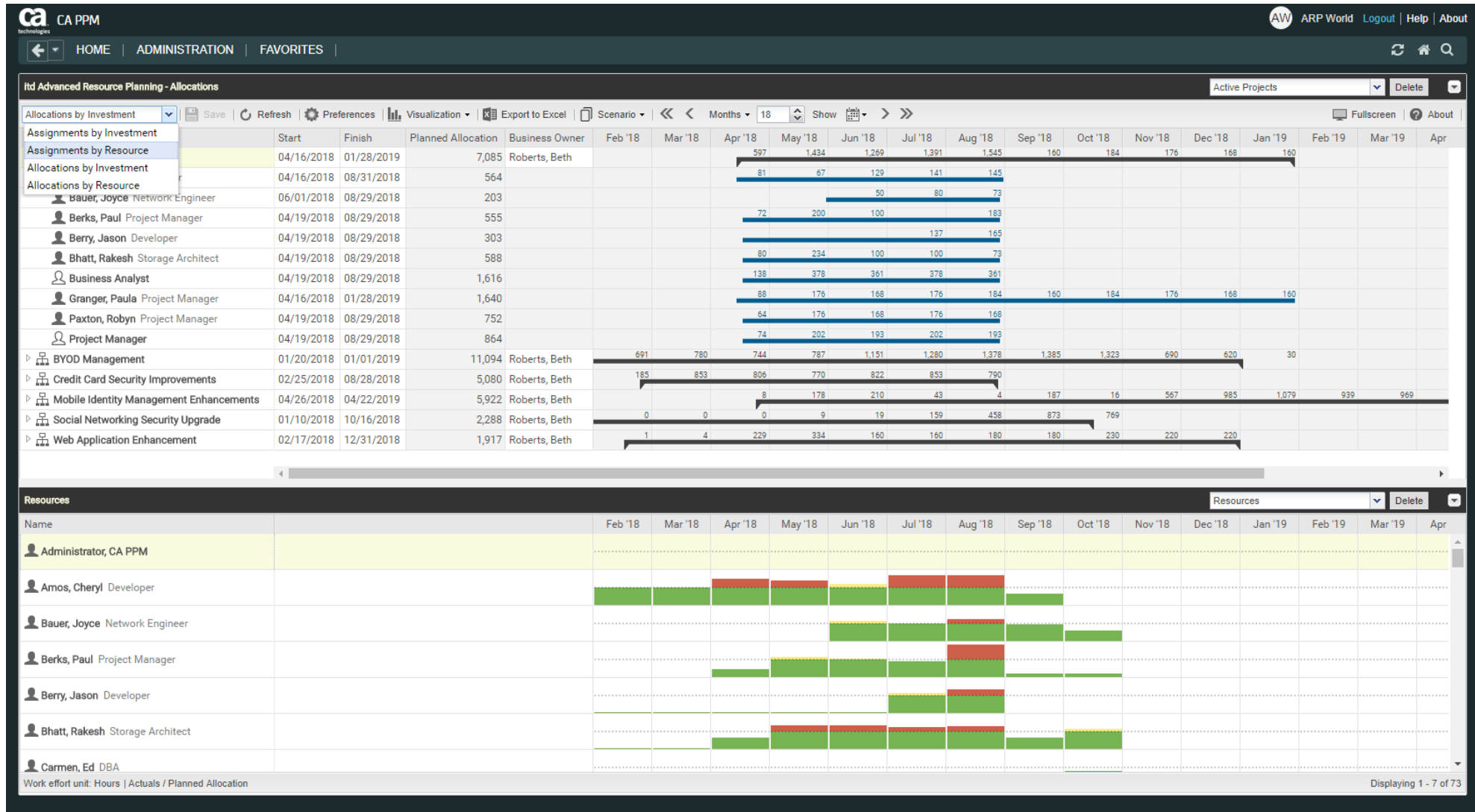
Advanced Resource Planner

- Is your Resource Planning tedious and prone to errors?
 - Single or cross-project resource planning
 - Optimally and quickly plan your resources
 - See effects of changes in plan to resource workload in real-time

Advanced Resource Planner




Advanced Resource Planner: Views

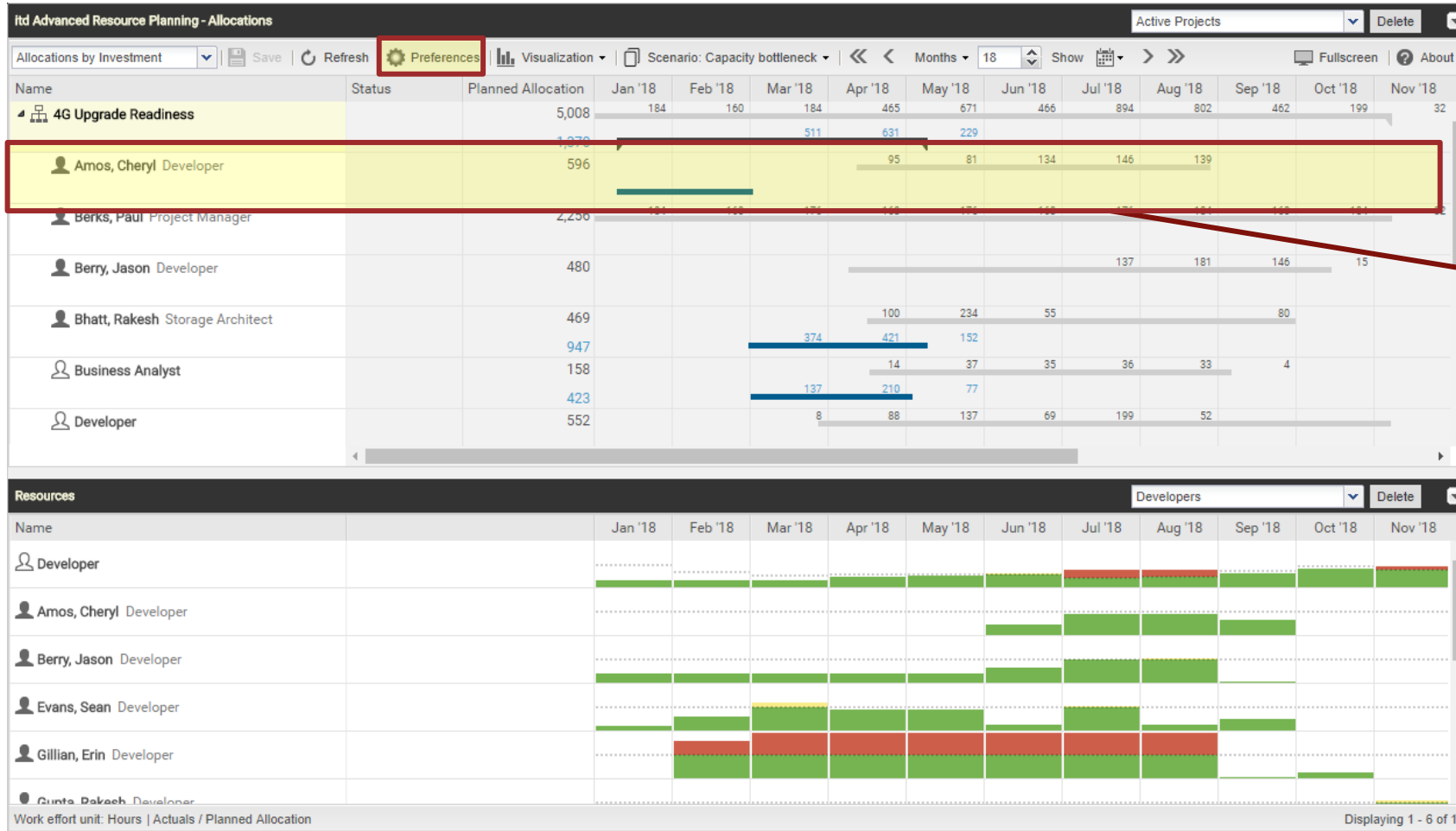


Advanced Resource Planner: Roles or Resource

Advanced Resource Planning allows you to see directly whether a role or a specific resource is scheduled for a project.

 4G Upgrade Readiness
 Amos, Cheryl Developer
 Bauer, Joyce Network Engineer
 Berks, Paul Project Manager
 Berry, Jason Developer
 Bhatt, Rakesh Storage Architect
 Business Analyst

Advanced Resource Planner: Scenarios



Upper bar :
Planned resource allocation

Lower bar
Resource Allocation Scenario

Advanced Resource Planner: Scenarios

itd Advanced Resource Planning - Allocations

IT Delete

Allocations by Resource Save Refresh Preferences Visualization Scenario: Capacity bottleneck Months: 18 Show Fullscreen About

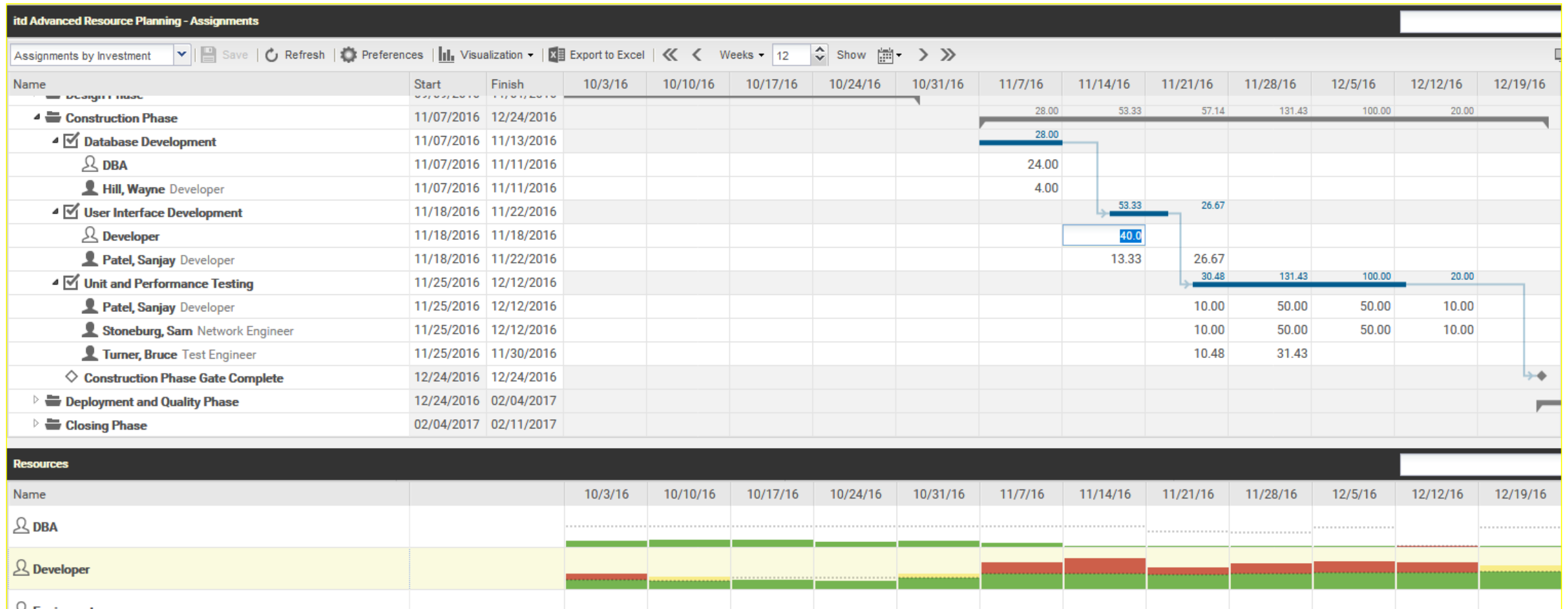
Name	Feb '18	Mar '18	Apr '18	May '18	Jun '18	Jul '18	Aug '18	Sep '18	Oct '18	Nov '18	Dec '18	Jan '19	Feb '19	Mar '19	Apr '19
Amos, Cheryl Developer	160 / 0	176 / 0	249 / -81	243 / -67	199 / -31	292 / -116	305 / -121	100 / 60	0 / 184	0 / 176	0 / 168	0 / 184	0 / 160	0 / 168	0 / 176
Architect	160 / 0	176 / 0	168 / 0	176 / 0	70 / 98	150 / 26	160 / 24	100 / 60	0 / 184	0 / 176	0 / 168	0 / 184	0 / 160	0 / 168	0 / 176
Bauer, Joyce Network Engineer	0 / 160	0 / 176	0 / 168	0 / 176	189 / -21	170 / 6	223 / -39	150 / 10	110 / 74	0 / 176	0 / 168	0 / 184	0 / 160	0 / 168	0 / 176
Berks, Paul Project Manager	0 / 160	0 / 176	72 / 96	200 / -24	170 / -2	150 / 26	338 / -154	26 / 134	32 / 152	0 / 176	0 / 168	0 / 184	0 / 160	0 / 168	0 / 176
4G Upgrade Readiness			72	200	100		183								
BYOD Management					70	150	155	26	32						
Credit Card Security Improvements					70	150	155	26	32						
Financial Process Audit															
Berry, Jason Developer	0 / 160	0 / 176	0 / 168	1 / 175	6 / 162	200 / -24	246 / -62	0 / 160	0 / 184	0 / 176	0 / 168	0 / 184	0 / 160	0 / 168	0 / 176
Bhatt, Rakesh Storage Architect	1 / 159	2 / 174	101 / 67	235 / -59	221 / -53	216 / -40	230 / -46	100 / 60	211 / -27	0 / 176	0 / 168	0 / 184	0 / 160	0 / 168	0 / 176
Business Analyst	320 / -58	352 / 295	306 / 1,015	554 / 829	361 / 968	378 / 1,006	361 / 910	0 / 1,222	0 / 1,351	0 / 1,307	0 / 1,357	0 / 1,636	0 / 1,422	0 / 1,510	0 / 1,584
Carmen, Ed DBA	0 / 160	0 / 176	0 / 168	0 / 176	0 / 168	6 / 170	66 / 118	73 / 87	142 / 42	0 / 176	0 / 168	0 / 184	0 / 160	0 / 168	0 / 176
Chasen, Nicole	0 / 160	0 / 176	0 / 168	0 / 176	0 / 168	0 / 176	0 / 184	0 / 160	0 / 184	0 / 176	0 / 168	0 / 184	0 / 160	0 / 168	0 / 176
Childers, Valerie Architect	226 / -66	245 / -69	57 / 111	56 / 120	137 / 31	40 / 136	40 / 144	0 / 160	0 / 184	0 / 176	0 / 168	0 / 184	0 / 160	0 / 168	0 / 176
Coleman, Joyce Architect	24 / 136	29 / 147	190 / -22	178 / -2	174 / -6	174 / 2	180 / 4	180 / -20	230 / -46	220 / -44	220 / -52	0 / 184	0 / 160	0 / 168	0 / 176
Computer Material	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Work effort unit: Hours | Actuals / Planned Allocation

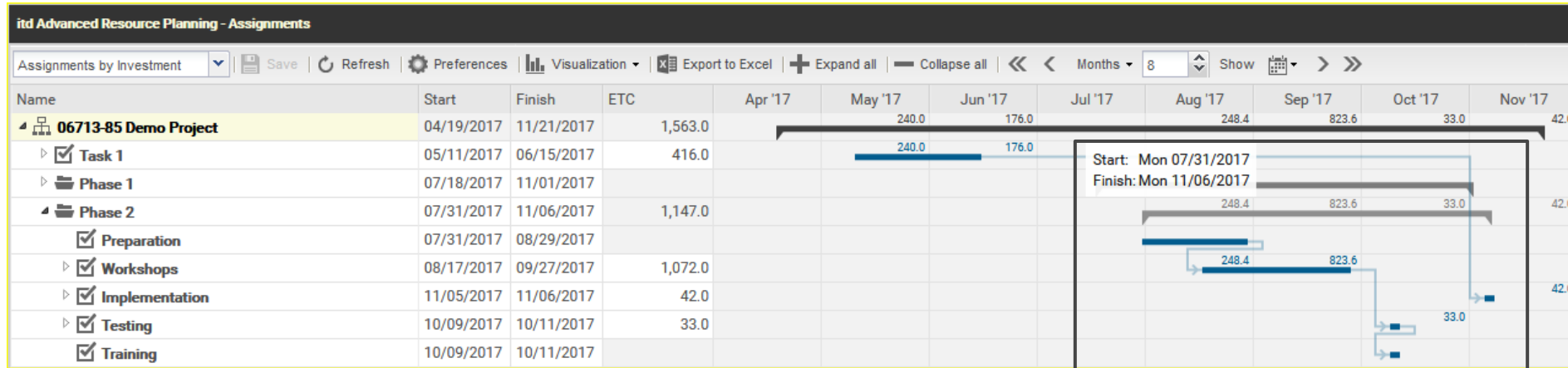
Blue numbers indicate changes in the plan scenario (compared to the original plan)

Advanced Resource Planner: ETC

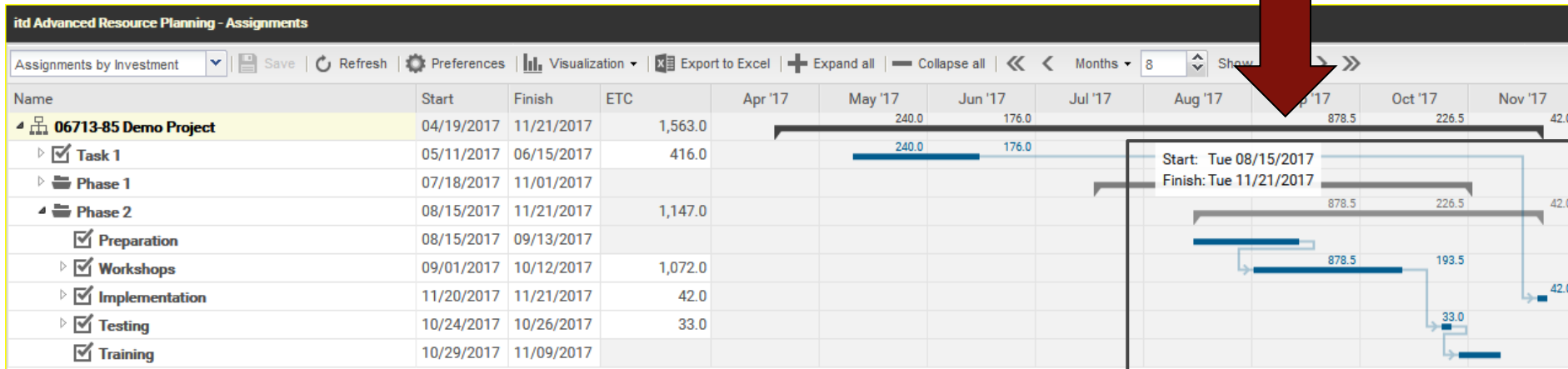
Advanced Resource Planning enables planning at the detailed task level



Advanced Resource Planner: Moving Tasks/Phases

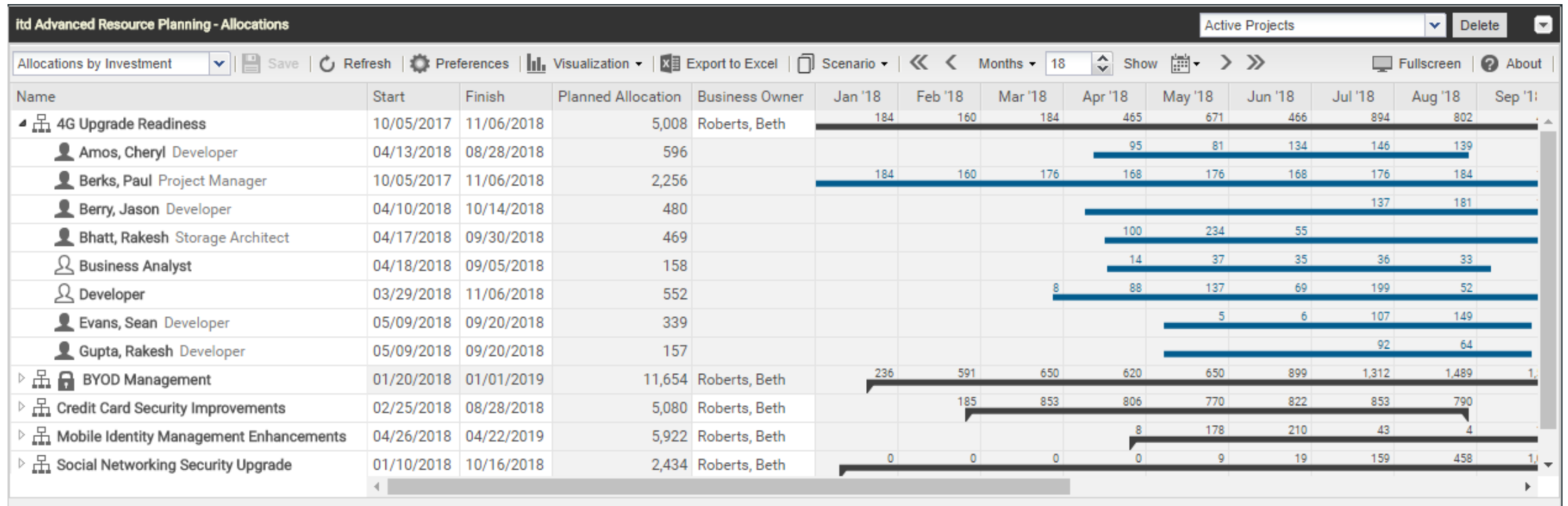


Move Gantt bar



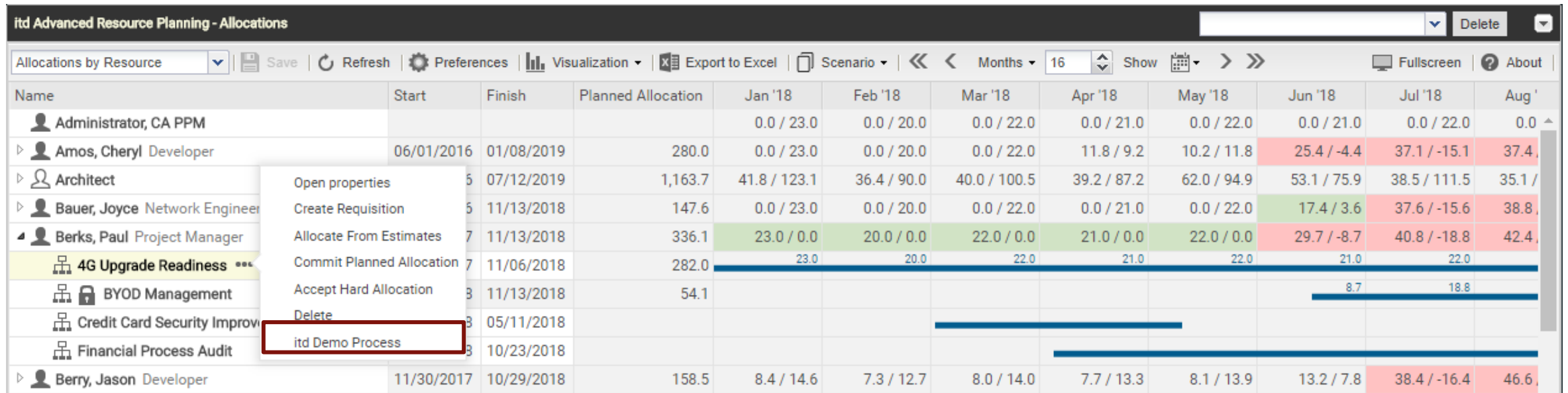
Advanced Resource Planner: Custom Attributes

Advanced Resource Planning allows you to filter by custom attributes and display them in columns in the tool.



Advanced Resource Planner: Trigger Actions

Advanced Resource Planning allows you to trigger custom actions from the editor. The selection of available actions in the context menu can be easily customized.



The screenshot displays the 'itd Advanced Resource Planning - Allocations' application. The interface includes a top navigation bar with options like 'Save', 'Refresh', 'Preferences', 'Visualization', 'Export to Excel', 'Scenario', and navigation controls. Below this is a table with columns for 'Name', 'Start', 'Finish', 'Planned Allocation', and monthly allocations from 'Jan '18' to 'Aug '18'. A context menu is open over the '4G Upgrade Readiness' row, listing several actions. The 'itd Demo Process' action is highlighted with a red box.

Name	Start	Finish	Planned Allocation	Jan '18	Feb '18	Mar '18	Apr '18	May '18	Jun '18	Jul '18	Aug '18
Administrator, CA PPM				0.0 / 23.0	0.0 / 20.0	0.0 / 22.0	0.0 / 21.0	0.0 / 22.0	0.0 / 21.0	0.0 / 22.0	0.0
Amos, Cheryl Developer	06/01/2016	01/08/2019	280.0	0.0 / 23.0	0.0 / 20.0	0.0 / 22.0	11.8 / 9.2	10.2 / 11.8	25.4 / -4.4	37.1 / -15.1	37.4
Architect	5	07/12/2019	1,163.7	41.8 / 123.1	36.4 / 90.0	40.0 / 100.5	39.2 / 87.2	62.0 / 94.9	53.1 / 75.9	38.5 / 111.5	35.1 /
Bauer, Joyce Network Engineer	5	11/13/2018	147.6	0.0 / 23.0	0.0 / 20.0	0.0 / 22.0	0.0 / 21.0	0.0 / 22.0	17.4 / 3.6	37.6 / -15.6	38.8
Berks, Paul Project Manager	7	11/13/2018	336.1	23.0 / 0.0	20.0 / 0.0	22.0 / 0.0	21.0 / 0.0	22.0 / 0.0	29.7 / -8.7	40.8 / -18.8	42.4
4G Upgrade Readiness	7	11/06/2018	282.0	23.0	20.0	22.0	21.0	22.0	21.0	22.0	
BYOD Management	8	11/13/2018	54.1						8.7	18.8	
Credit Card Security Improv	8	05/11/2018									
Financial Process Audit	8	10/23/2018									
Berry, Jason Developer	11/30/2017	10/29/2018	158.5	8.4 / 14.6	7.3 / 12.7	8.0 / 14.0	7.7 / 13.3	8.1 / 13.9	13.2 / 7.8	38.4 / -16.4	46.6

Advanced Resource Planner: Filters

itd Advanced Resource Planning - Allocations

Active Projects

Allocations by Investment 13

itd Advanced Resource Planning - Allocations

Investments:

Investment Type:

Inactive Investments:

Investment OBS Unit:

Resource Manager:

Is Role:

Resource OBS Unit:

Booking Manager:

Booking Status:

Request Status:

Allocations by Investment 12

Name	Planned Alloc...	Hard Alloc...	Jun '17	Jul '17	Aug '17	Sep '17	Oct '17	Nov '17	Dec '17	Jan '18	Fe
4G Upgrade Readiness	3,502.27	0.33	1,028.22	1,810.71	116.67						
Airport Access Security	1,904.00		176.00	168.00	184.00	168.00	176.00	168.00			
AP Architecture Consolidation	352.00										
APJ Data Center											
APJ Research and Development Center											
APJ Technology Center											
Application Change 102	88.00										

Advanced Resource Planner: The Benefits

FOR Project Managers

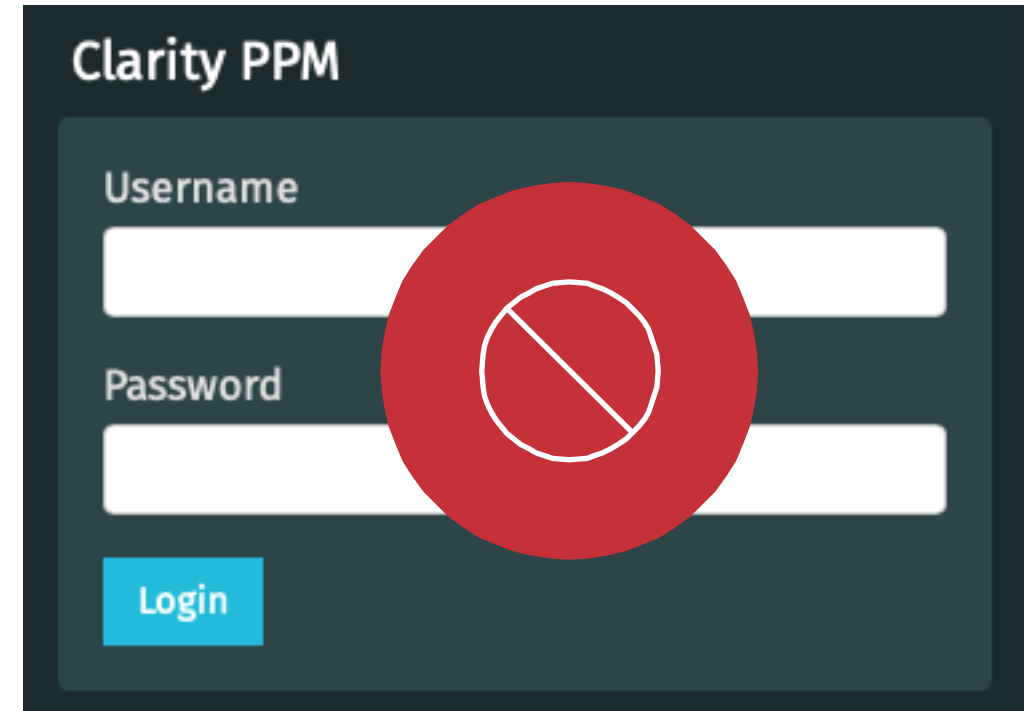
- Edit resource **assignments or allocations** for **multiple projects on one screen**
- **Drill down into phases and tasks** and edit **detailed task assignments**
- **Real time feedback** – color highlighted
- **Super fast**

FOR Resource Managers

- See a resource's **full workload across all investments** on the same screen
- **Pivot** by resource or by project
- Edit **ETC** even for **non-projects** (other work, services, etc.)
- **Works with huge installations**

Single Sign-on

- Simplify access to Clarity PPM
- Centralise control of Users and policies
- Supports deep links
- Kerberos/NTLMv2 or SAML 2 options



Document Drive

- Easy quick editing of Documents in Clarity PPM

Project: eCommerce Portal - Document Manager

Search

<input type="checkbox"/>		Name
<input type="checkbox"/>		Top
<input type="checkbox"/>		Project Communications Management Plan.doc
<input type="checkbox"/>		Project Cost Management Plan.doc
<input type="checkbox"/>		Project Quality Management Plan.doc
<input type="checkbox"/>		Project Risk Management Plan.doc
<input type="checkbox"/>		Project Scope Management Plan.doc

5 items

Name	Modified	Size
Project Cost Management Plan.doc	8/1/2018 2:41 PM	19 KB
Project Quality Management Plan.doc	8/1/2018 2:41 PM	68 KB
Project Risk Management Plan.doc	8/1/2018 2:41 PM	44 KB
Project Scope Management Plan.doc	8/1/2018 2:41 PM	40 KB

Document Drive

- Access the Clarity PPM Documents via a local folder
- Supports any existing WebDav Client
- Maintains folder structure
- Supports the Clarity PPM rights model
- Respects Document versioning

Access Data

Data Loader

- Fast bulk loading of Excel (XLSX) data

- All within Clarity PPM

DataLoader: CP1 - General - *Properties* ⚙️ **Actions** ▾

General ★

Template Name	QIC Cost Plan Monthly	Name	CP1
Execution Type	Validate and Load	Status	Success
Upload Document	Costplan Sample.xlsx	Log Information	XOG Status: Inserted Records: 1 Failure Records: 0 Updated Records: 0 Total Records: 1 Warnings: 0 Fatal Errors: 0

Additional Information

Created By	Administrator, PPM	Last Updated By	Administrator, PPM
Created Date	7/11/2018	Last Updated Date	7/11/2018

[Save](#) [Save And Return](#) [Return](#)

Data Loader

- Configurable templates

+ Filter: System Default ▾						
<input type="checkbox"/>	ID	Excel Input Column ▲	Input Type	Section	Clarity Attribute	Is Active
<input type="checkbox"/>	order	Order	Number	Projects/Project/Tasks/Task	orderID	✓
<input type="checkbox"/>	outlineLevel	Outline Level	Number	Projects/Project/Tasks/Task	outlineLevel	✓
<input type="checkbox"/>	projectID	Project ID	String	Projects/Project	projectID	✓
<input type="checkbox"/>	proj_name	Project Name	String	Projects/Project	name	✓
<input type="checkbox"/>	resource_finish	Resource Finish Date	Date	Projects/Project/Tasks/Task/Assignments/TaskLabor	finish	✓
<input type="checkbox"/>	resourceID	Resource ID	String	Projects/Project/Tasks/Task/Assignments/TaskLabor	resourceID	✓
<input type="checkbox"/>	resource_start	Resource Start Date	Date	Projects/Project/Tasks/Task/Assignments/TaskLabor	start	✓
<input type="checkbox"/>	finish	Task Finish Date	Date	Projects/Project/Tasks/Task	finish	✓
<input type="checkbox"/>	taskID	Task ID	String	Projects/Project/Tasks/Task	taskID	✓
<input type="checkbox"/>	name	Task Name	String	Projects/Project/Tasks/Task	name	✓
<input type="checkbox"/>	start	Task Start Date	Date	Projects/Project/Tasks/Task	start	✓

<input type="checkbox"/>	Active Resource or Role by Unique Name	Validation Query	active_resource_or_role	·
<input type="checkbox"/>	Active Role filter by Unique Name	Validation Query	role_filter_by_unique_name	·
<input type="checkbox"/>	Active Users From User Name	Validation Query	active_users_from_userName	·
<input type="checkbox"/>	Assignment ID from task ID and Resource ID	Mapping Query	assign_id from_task_and_res	·
<input type="checkbox"/>	Assignment: Resource start between task start and finish	Validation Query	res_strt_btw_task_strt_nd_fini	·

- Configurable data validation & mapping

Excel Exchange

- Bi-directional exchange of data with Microsoft Excel

The screenshot displays the Microsoft Excel interface with the CLARITY ribbon active. The ribbon includes options for connecting to a server, setting locale and language, defining query names and destination sheets, and options for filtering and importing data. Below the ribbon, a data table is visible in the 'Imported_Data' worksheet. The table has columns for uniqueid, ID, CR, Project-No., Customer, Co-customer, Portfolio, and Rank. The data is as follows:

	A	B	C	D	E	F	G	H
1	uniqueid	ID [format-example: OR_2015_xx]	CR	Project-No.	Customer	Co-customer	Portfolio	Rank
2	1	GBA_2019_10	yes	P0366	IT	FB	5 - Corporate development	4
3	2	HSA_2018_12		P0875	IT		3 - Digitalization / Industry 4.0	7
4	3	HSA_2019_12		P1267	FB	HR	3 - Digitalization / Industry 4.0	23
	4	PSC_2020_03		P0239	HR		3 - Digitalization / Industry 4.0	18
5								
6	5	MAG_2015_06	yes	P1538	HR	IT	5 - Corporate development	2
7	6	PSC_2022_07		P0240	HR		3 - Digitalization / Industry 4.0	36

Excel Exchange

- Connect to Clarity PPM from Excel
- Grab data from Clarity PPM with freely selectable objects
- Filter for specific data
- Edit the data in Excel and save the changes to Clarity PPM

Timeslicer

- Real-time direct access to all of the time scaled data stored in BLOBS/Image columns

```
SELECT C.PRID, E.STARTDATE,  
E.FINISHDATE, E.DUR/3600  
FROM PRCALENDAR C  
CROSS JOIN TABLE(PL_PEM_CRVLIB.CAL_EXCEPTIONS(C.PRVALUE, 1)) E
```

	PRID	STARTDATE	FINISHDATE	E.DUR/3600
1	9	2020-03-02 00.00.00	2020-03-03 00.00.00	8
2	5000000	2019-05-06 00.00.00	2019-05-07 00.00.00	0
3	5000000	2019-05-27 00.00.00	2019-05-28 00.00.00	0
4	5000000	2020-03-02 00.00.00	2020-03-03 00.00.00	8

- Use in Reports, Portlets or Processes

TimeSlicer

- Ships with approx. 50 functions
- Oracle: single package PL_PEM_CRVLIB + Java code
- SQL Server: Scalar and Table functions plus .NET assembly
- Easy install

TimeSlicer: Time Slices

- Removes the need to expand the TimeSlice date ranges.
- No need to create custom slices
- Slice by calendar periods and fiscal periods
- Weekly periods can start on any day of the week
- No date restriction

TimeSlicer: What else

- Extract BLOB segments
- Report on Calendars, shifts and exceptions
- Resource availability rate
- Validates BLOBs – checking for errors

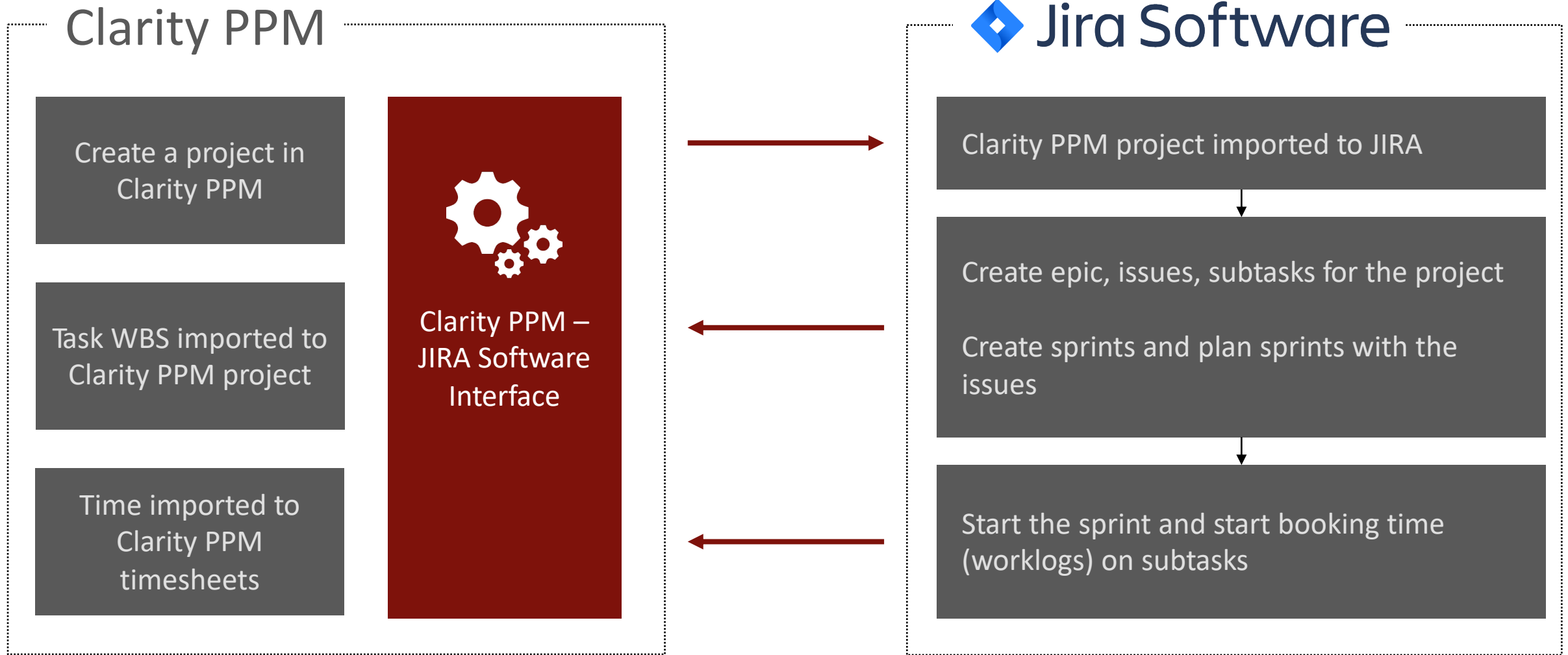
Integrate

Jira Integration

- See your Jira planned projects in Clarity PPM
- Avoid duplicating effort
- Minimise risk of errors

Improve efficiency & data quality

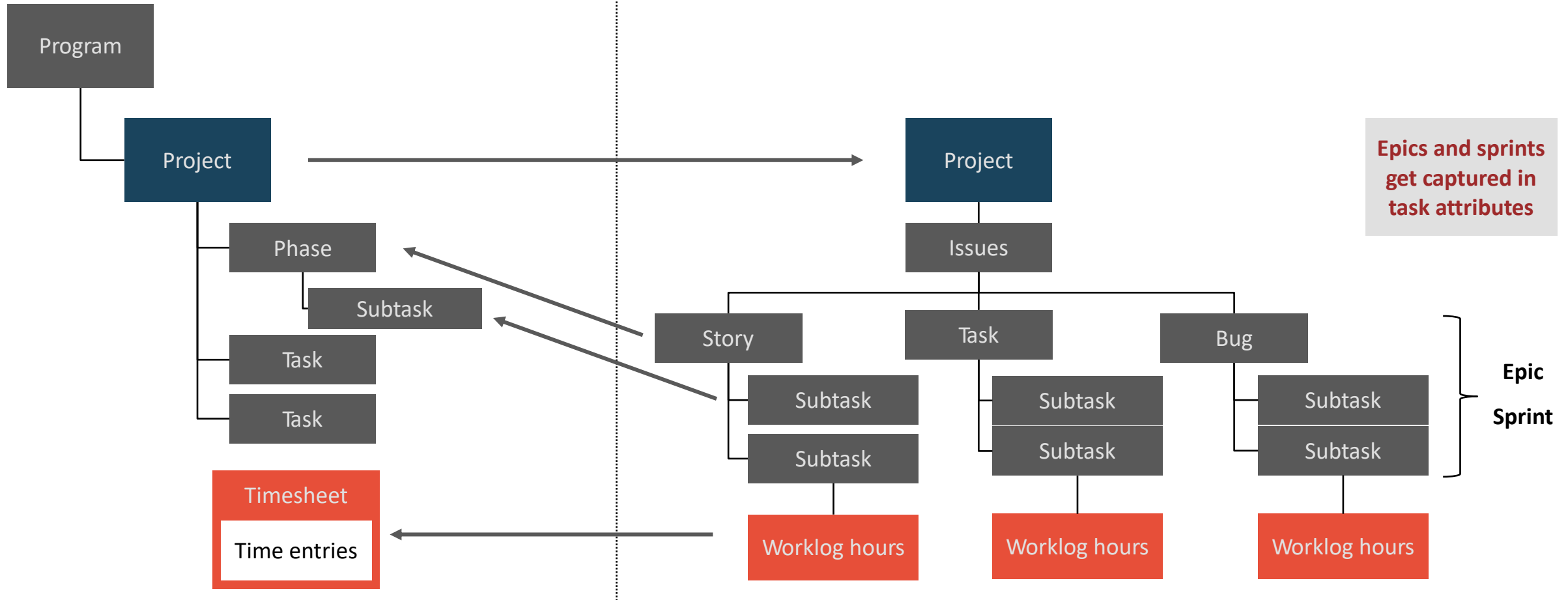
Jira Integration



Jira Integration



Clarity PPM

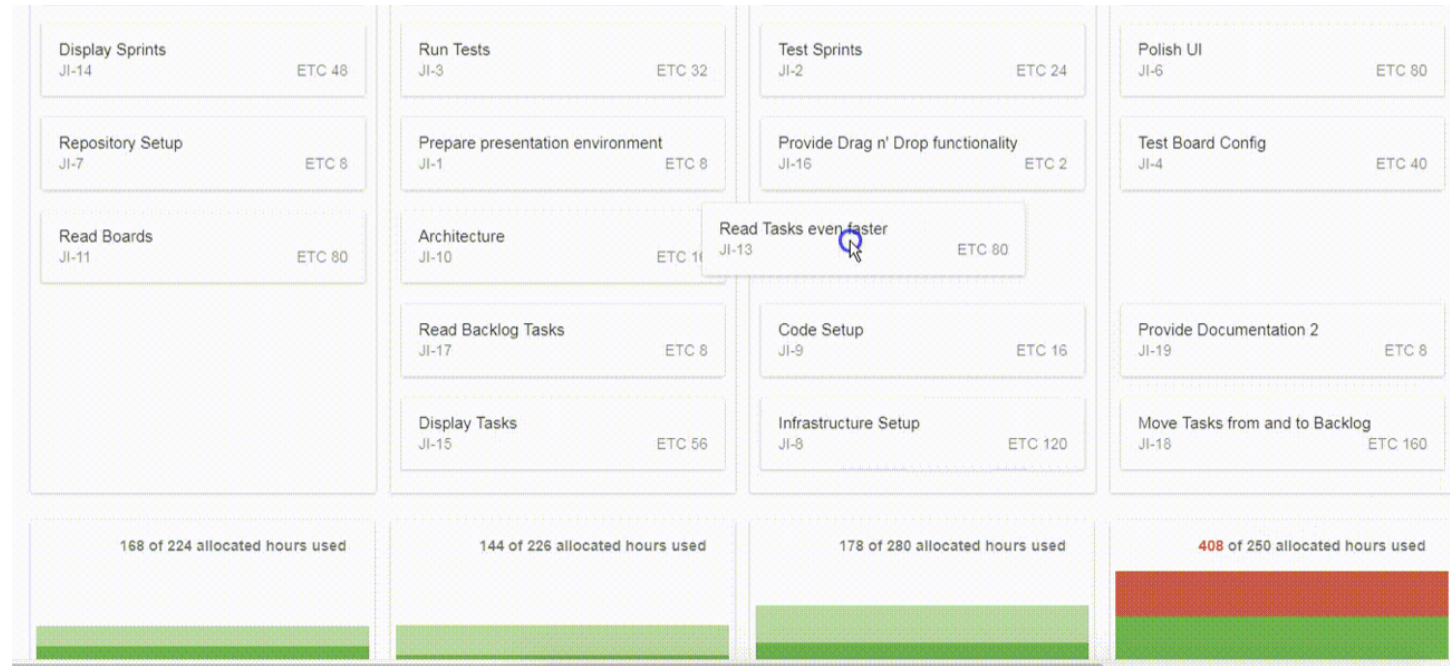


Team Capacity

- Clarity PPM for capacity and strategic planning
- Jira for operational Sprint planning
- There's a need for data transparency between the two Resource planning processes

Team Capacity

- Unify Jira and Clarity PPM data



- Combine Sprint planning with Clarity PPM Team Capacity data

Team Capacity

- Drag and drop users stories between sprints
- Provides immediate feedback on changing utilisation rates - allocation vs assignment
- Imports Jira tasks and sprints from Jira to Clarity PPM

Extending the value of Clarity PPM with pre-built components

Questions?

Thank you for attending

Extending the value of Clarity PPM with pre-built components



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**Let us know how we can
improve!
Don't forget to fill out the
feedback forms!**