Clarity PPM 16.4.0 – Chatbot Knowledge Document

#Changes in Process modules:

1. **Action Items Comments:** Previously, users could perform decision actions on Action Items, but could not provide contextual comments unless configured separately in a process step. This limited communication and traceability in approval workflows.

In Clarity 16.4.0, Action Items have been enhanced to allow users to add comments directly within Clarity. A new Require Comment configuration has been introduced, enabling administrators to make comments mandatory for specific decision actions, such as

Reject. When a comment is required, the Add Comment dialog appears automatically, and the Save button remains disabled until a comment is entered. This enhancement improves decision tracking, audit transparency, and process compliance.

Users can also add optional comments for open or pending items, edit or delete their own comments, and view all comments in the View History Decisions section.

a. **Upgrade Impact:**

After you upgrade, the following changes take effect:

- All existing Action Items will continue to work as before, and no user comments are lost.
- The new Require Comment configuration is not automatically applied to existing processes. Administrators must explicitly enable this option for selected decisions if required.
- Existing processes with Action Items in progress will not be disrupted. Users can continue to act on those Action Items without being forced to add comments unless the process definition is updated.
- To apply the new comment requirement, administrators can either:
  - Use Save As to create a new version of an existing process and configure the Require Comment option, or
  - Cancel active process instances, set the process to Draft mode, and modify the Decisions and Actions section directly.
- Once a process definition with a comment requirement is deployed, all new Action Items created from that process will enforce the comment rule as configured.

- Comments stored in existing Action Items (from both Classic and Clarity) remain visible and editable according to their current state and ownership.
- No migration scripts are required, and there is no impact on historical process data.

#Introducing the Queries Workspace (Beta)-For clarity Administrators:

Clarity now includes the Queries capability in the Administration workspace. This feature allows administrators to create simple queries to view data within the Transactional Schema.

Upgrade Impact: After you upgrade to this release, you can grant the Administrators - Queries - Navigate right to administrators to enable them to create and manage queries in the Administration workspace.

#**Usibility improvements-For clarity users**

1. **View and Manage Hierarchical Data for Master and Sub-Object Instances in Investments:** In previous releases, users had to navigate between separate pages to view or manage sub-object data related to investments. In Clarity 16.4.0, you can now view and manage hierarchical data for master-object and sub-object instances on a single page. This capability streamlines data management and enhances visibility across related records. This enhancement is available for Projects, Ideas, Custom Investments, and Team Investments.
    a. **Upgrade Impact:** After you upgrade, you can view and manage master-object and sub-object data together on a single page for Projects, Ideas, Custom Investments, and Team Investments. No additional configuration is required if the feature toggle is already enabled.

#Enhancements to Financials:

1. New Fields in Investments: Many new variance attributes is introduced for investment object.
2. New Fields in Budget/Cost Plan added:

- %Spend
- Actual Profit
- Forecast % of Cost
- Forecast Profit
- Forecast Remanning
- Planned to Forecast Variance
- Profit

3. View Multicurrency Transactions in Actual and Posted Transactions: In previous releases, Actual and Posted Transactions in Clarity displayed financial data only in the Home or Investment currency. In Clarity 16.4.0, you can now view and analyze transactions across multiple currencies directly in the Posted Transactions and Actual Transactions grids. This enhancement provides accurate financial visibility with automatic currency conversion and improved reporting consistency.

Upgrade Impact: After upgrade changes will auto-reflect and no other impacts.

4. Renaming of the Update Financial Plan Actuals and Forecast job: In Clarity 16.4.0, the job previously called “Update Financial Plan Actuals and Forecast” has been renamed to Post WIP Actuals to Financial Plans.

#Introducing the New Rally Calculation Method Attribute

In previous releases, Frictionless Cost Accounting (FCA) calculations in Clarity relied solely on Rally story points to determine team productivity and cost distribution.

In Clarity 16.4.0, a new Rally Calculation Method attribute introduces flexibility by allowing teams to choose between Points or Count when calculating FCA metrics. This enhancement better aligns with various Agile practices and improves the accuracy of cost and productivity analysis.

To learn more: https://techdocs.broadcom.com/us/en/ca-enterprise-software/business-management/clarity-project-and-portfolio-management-ppm-on-premise/16-4-0/using/Getting-Started-with-Clarity-Administration/Clarity-Connections---Rally-Integrations/setting-up-the-clarity-rally-integration/frictionless-cost-accounting/frictionless-cost-accounting-calculations.html

Upgrade Impact:

After you upgrade: If both Frictionless Cost Accounting Mapping and Rally Team for Frictionless Cost Accounting attributes are configured in a Team Investment, Clarity automatically sets the Rally Calculation Method to Points during upgrade.

If these attributes are not configured, the Rally Calculation Method is set to Null by default.

#General Enhancements

1. **Include Notification Data in Health Report: For clarity Admin**

Previously, the system health report provided administrators with details on background job performance, service status, and configuration checks, but did not include visibility into Clarity notification delivery status. This limited administrators’ ability to monitor email and in-app notification activity from a single diagnostic report.

In Clarity 16.4.0, the Health Report has been enhanced to include notification-related data, giving administrators a comprehensive view of notification events, counts, and system-level details related to notification services. This addition helps administrators proactively identify and resolve notification-related issues, ensuring smoother communication between Clarity and end users.

Upgrade Impact: This enhancement is automatically available after upgrade. No configuration changes or setup are required.

2. **OBS Filter Enhancement: For clarity Admin**
   Previously, when filtering based on Organizational Breakdown Structure (OBS) attributes, users could only apply the Is Empty and Is Equal To operators. This limited flexibility when performing advanced filtering, particularly in scenarios requiring exclusion logic or visibility into non-null OBS associations. In Clarity 16.4.0, the OBS filtering capability has been enhanced to support two additional operators—Is Not Empty and Is Not Equal To. These operators are available across both Clarity and Reporting, enabling users to create more refined filters for OBS-based data and to improve reporting accuracy and usability.

3. **Enhancements to Business Rules: For clarity Admin**
   Business rules in Clarity have been updated to include the following enhancements.

- You can now configure up upto 50 business rules per object, up upto a maximum of 250 per blueprint.
- The business rule name can now be up to 256 characters, up from 80 in previous releases.
- The Source Object attribute has been renamed to Target Object.
- To learn more, see Working with Business Rules.

Upgrade Impact: After you upgrade, these enhancements are available in your Clarity environment.

#Enhancements to Report Designer

1. Usability Enhancements for Charts and Widgets:
   a. Introducing the Ability to Switch Charts: The Report Designer now includes a powerful Chart Type Switcher that lets users seamlessly switch between chart types (such as Line, Bar, Column, Pie, etc.) while preserving the chart's current data configurations and styling settings. This capability enables an intuitive user experience that lets designers experiment with multiple visualization styles to best represent their data without having to redo the chart setup each time.

   Some key points to remember are:
   If you change other chart configurations when switching chart types, only the latest chart configurations will be retained after switching.
   The Chart Type Switcher does not provide undo/redo functionality; it only retains the latest chart configuration when switching between chart types.

b. Widget Sizing and Adjustment Improvements: Designers can configure widgets more granularly to better fine-tune report content on the canvas due to new widget sizing and adjustment improvements.

Null Attribute will Display as None : Clarity will display the Null value as None within attribute groups. In previous releases, Clarity displayed “blank” for Null values.
Introducing the Starred Attribute: The new Starred Attribute feature lets users mark and easily identify key columns in the Report Designer grid. Starred columns can be quickly located, helping users focus on the most important or frequently referenced data points.

c. Hide Borders for Widgets: A new styling option has been introduced in the Report Designer, allowing users to toggle the visibility of borders around each widget. The ‘Show Border’ toggle is now available under the ‘Style’ tab for every widget in the Report Designer. By default, Show Border is set to True, meaning widget borders are visible. Users can switch this toggle to False to hide the border, creating a cleaner, less visually segmented report layout.
d. Enhanced Axis Customization: The Report Designer now offers improved customization for chart axes with new toggle options for both the X and Y axes:
e. Show Title: Enable or disable the display of axis titles to clarify the data dimension represented.
f. Show Labels: Control the visibility of axis labels that annotate individual data points or categories.
g. Show Gridlines: Toggle gridlines on or off to enhance or simplify the background reference lines along the axes.

These settings provide granular control over chart presentation, enabling users to tailor the visual clarity and aesthetics of their reports.
To learn more, https://techdocs.broadcom.com/us/en/ca-enterprise-software/business-management/clarity-project-and-portfolio-management-ppm-on-premise/16-4-0/using/working-with-reporting/working-with-report-designer.html

Upgrade Impact: This enhancement is automatically available upon upgrade. Report Designers can begin leveraging these capabilities immediately in the Report Designer canvas.

2. Introducing the New Widget Type – Line Chart: Previously, Report Designers could visualize trends using bar, column, and other available chart types, but there was no direct way to represent continuous change or time-based progressions. In Clarity 16.4.0, a new **Line Chart** widget has been introduced to the Report Designer, enabling designers to visualize trends, patterns, and comparisons over time with greater clarity and control. The Line Chart provides an intuitive way to visualize how metrics evolve, helping users identify growth trends, seasonal patterns, anomalies, and relative performance across multiple datasets.

3. Enhancements to Line, Bar, and Column Charts
4. Configure Conditional Formatting on Tables
5. Introducing System Reports
6. Copy System Reports and Remap Data Providers
7. Exporting Reports
8. Manage Table Column Controls from the Hamburger Menu
9. Manage Styling Controls in Tables
10. Add Link Action on Name and ID Columns in Table Widgets
11. Introducing the Repeat Total Row in View Options
12. Rename Columns and Per-Period Metric Fields in Tables
13. Introducing the Show Per-Period Metrics Column in Table Row Orientation
14. Manage Saved Filters and Filter Chip Counter Enhancements
15. Report-Level Filter Relocation in Report Designer and Viewer
16. Per-Period Metric Settings Across Report, Tab, and Widget Levels

#Known Issues

1. DE178522: The ‘Base Calendar’ Field Is Missing in Rule Actions for Selection in the Resource Blueprint

Summary: The ‘Base Calendar’ attribute of the Resource object is missing from the blueprint rule 'Actions' builder. Administrators can see this attribute in the Condition builder for filtering criteria, but they cannot hide it on the Properties page because it does not appear as a selectable field in the 'Actions' builder.

Expected Results: The ‘Base Calendar’ attribute should appear in the 'Actions' builder to create a rule to 'Hide Attributes'.

Actual Results: The ‘Base Calendar’ attribute does not appear in the 'Actions' builder for selection.

Workaround: None.