

ID	Title	Assignment	Type	Description
EX0003	% Time by Type and Timescale - Column Graph - Oracle	theBasiX™	Portlet	The Percent Time by Type and Timescale - Graph portlet shows a breakout of time by timescale for resources the logged in user has view rights to. This portlet gives the Clarity user the ability to show the amount of hours spent on each project type by week, month, quarter and year. Using this portlet, the Clarity user can get an overview of all hours in a time period or use the filter to search for a specific dataset (as required). The portlet provides a filter for OBS and date ranges.
EX0003	% Time by Type and Timescale - Column Graph - SQL Server	theBasiX™	Portlet	The Percent Time by Type and Timescale - Graph portlet shows a breakout of time by timescale for resources the logged in user has view rights to. This portlet gives the Clarity user the ability to show the amount of hours spent on each project type by week, month, quarter and year. Using this portlet, the Clarity user can get an overview of all hours in a time period or use the filter to search for a specific dataset (as required). The portlet provides a filter for OBS and date ranges.
EX0006	% Time by Type and Timescale - Grid - Oracle	theBasiX™	Portlet	The Percent Time by Type and Timescale - Grid portlet shows a breakout of time by timescale for resources the logged in user has view rights for using the timeslices. This portlet gives the Clarity user the ability to show the amount of hours spent on a project by week, month, quarter and year. Using this portlet, the Clarity user can get an overview of all hours in a time period or use the filter to search for a specific dataset (as required). The portlet provides a filter for OBS and date ranges.
EX0006	% Time by Type and Timescale - Grid - SQL Server	theBasiX™	Portlet	The Percent Time by Type and Timescale - Grid portlet shows a breakout of time by timescale for resources the logged in user has view rights for using the timeslices. This portlet gives the Clarity user the ability to show the amount of hours spent on a project by week, month, quarter and year. Using this portlet, the Clarity user can get an overview of all hours in a time period or use the filter to search for a specific dataset (as required). The portlet provides a filter for OBS and date ranges.
EX0007	Active Workflow Processes - Oracle	theWorX™	Portlet	The Active Workflow Processes allows you to view all of the workflow processes within the system. It shows information about the process: the objects related, the start type, and if the process has sub-processes, jobs, or GEL scripts. This portlet is used by admins to determine how many processes are currently running in the system and on which objects. It will also display the start action, how many GEL scripts reside in the process, the run count and how many the sub-processes each process has. This information is helpful during upgrades and other testing.
EX0007	Active Workflow Processes - SQL Server	theWorX™	Portlet	The Active Workflow Processes allows you to view all of the active workflow processes within the system. It shows information about the process: the objects related, the start type, and if the process has sub-processes, jobs, or GEL scripts. This portlet is used by admins to determine how many processes are currently running in the system and on which objects. It will also display the start action, how many GEL scripts reside in the process, the run count and how many the sub-processes each process has. This

				information is helpful during upgrades and other testing.
EX0009	All Change Requests - Oracle	theBasiX™	Portlet	The All Change Request portlet displays all change requests related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view change requests across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The filter allows the user to narrow their search by date ranges, resources involved, and/or the project with which the Change Request is associated. Other alternatives for filtering include the category, priority or status of the Change Request. In the list view, a status is displayed for each Change Request (CR), along with the Project with which the CR is associated, the CR ID, the CR name, the resource to whom the CR is assigned, Priority, Expected Closure Date, and number of days the CR has remained open. Note: Only the projects that the user has viewer rights to will show up in the list.
EX0009	All Change Requests - SQL Server	theBasiX™	Portlet	The All Change Request portlet displays all change requests related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view change requests across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The filter allows the user to narrow their search by date ranges, resources involved, and/or the project with which the Change Request is associated. Other alternatives for filtering include the category, priority or status of the Change Request. In the list view, a status is displayed for each Change Request (CR), along with the Project with which the CR is associated, the CR ID, the CR name, the resource to whom the CR is assigned, Priority, Expected Closure Date, and number of days the CR has remained open. Note: Only the projects that the user has viewer rights to will show up in the list.
EX0010	All Incidents - Oracle	theWorX™	Portlet	The All Incidents portlet shows all Incidents the user has view rights on and provides a single view to increase ease of management. Status indicators provide a quick overview of incident statuses so a user may prioritize. The filter then allows the user to narrow their search using date ranges and/or resources assigned. Other alternatives for filtering include the status, urgency, priority or impact of the Incident.
EX0010	All Incidents - SQL Server	theWorX™	Portlet	The All Incidents portlet shows all Incidents the user has view rights on and provides a single view to increase ease of management. Status indicators provide a quick overview of incident statuses so a user may prioritize. The filter then allows the user to narrow their search using date ranges and/or resources assigned. Other alternatives for filtering include the status, urgency, priority or impact of the Incident.
EX0011	All Issues - Oracle	theBasiX™	Portlet	The All Issues portlet displays all Issues related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view issues across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The filter then allows the user to narrow their search by Issue ID, Issue Name, Project ID, Project

				Name, the individual to whom the issue is assigned, and Issue Status. You may also narrow the view to display issues with a target resolution date within a certain date range, or Issues associated with a particular Category or OBS unit. Note: Only the projects that the user has viewer rights to will show up in the list.
EX0011	All Issues - SQL Server	theBasiX™	Portlet	The All Issues portlet displays all Issues related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view issues across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The filter then allows the user to narrow their search by Issue ID, Issue Name, Project ID, Project Name, the individual to whom the issue is assigned, and Issue Status. You may also narrow the view to display issues with a target resolution date within a certain date range, or Issues associated with a particular Category or OBS unit. Note: Only the projects that the user has viewer rights to will show up in the list.
EX0012	All Risks - Oracle	theBasiX™	Portlet	The All Risks portlet displays all risks related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view risks across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The portlet displays Project ID, Project, Risk ID, Risk, Category, Assigned to, Status, Probability, Impact, Priority, Target Resolution Date, and Days opened. The filter allows narrowing down of the risks by several different criteria. Note: Only the projects that the user has viewer rights to will show up in the list.
EX0012	All Risks - SQL Server	theBasiX™	Portlet	The All Risks portlet displays all risks related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view risks across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The portlet displays Project ID, Project, Risk ID, Risk, Category, Assigned to, Status, Probability, Impact, Priority, Target Resolution Date, and Days opened. The filter allows narrowing down of the risks by several different criteria. Note: Only the projects that the user has viewer rights to will show up in the list.
EX0013	All Skills - Oracle	theWorX™	Portlet	The All Skills portlet displays active skills available in the skills hierarchy, thus providing visibility to these values, without requiring administrative rights to be granted to the user. Viewing the skills list together in one view will allow the user to easily determine which skills they wish to add to their profile. The user may filter by Skill Name, or for skills associated with a particular parent skill.
EX0013	All Skills - SQL Server	theWorX™	Portlet	The All Skills portlet displays active skills available in the skills hierarchy, thus providing visibility to these values, without requiring administrative rights to be granted to the user. Viewing the skills list together in one view will allow the user to easily determine which skills they wish to add to their profile. The user may

				filter by Skill Name, or for skills associated with a particular parent skill.
EX0014	All Status Reports - Oracle	theWorX™	Portlet	The All Status Reports portlet displays any published Status Report related to a project or across multiple projects. The filter then allows the user to narrow their search by Project Manager, Project, Status or Overall Status Category (overall, cost & effort, scope or schedule). The user may also select if they wish to view only current Status Reports, or to include historical reports as well. The portlet provides the project manager a single place to view all of the status reports without having to go into each project individually, and allows for more efficient management and reporting across projects. Note: Only the projects that the user has view rights to will show up in the list.
EX0014	All Status Reports - SQL Server	theWorX™	Portlet	The All Status Reports portlet displays any published Status Report related to a project or across multiple projects. The filter then allows the user to narrow their search by Project Manager, Project, Status or Overall Status Category (overall, cost & effort, scope or schedule). The user may also select if they wish to view only current Status Reports, or to include historical reports as well. The portlet provides the project manager a single place to view all of the status reports without having to go into each project individually, and allows for more efficient management and reporting across projects. Note: Only the projects that the user has view rights to will show up in the list.
EX0015	All Tasks - Oracle	theBasiX™	Portlet	The All Tasks portlet displays all tasks related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view tasks across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The portlet displays project actuals and estimates from the project (datamart tables). The portlet allows analysis like: <ul style="list-style-type: none"> • PMs may have several critical tasks that were supposed to start on a certain date. To verify progress, they filter for that start date to perform a review of the tasks. • PMs may have resources that could leave the project. They can review their tasks and identify which need to be reassigned. • PMs can review days late to see how tasks are doing against the baseline date (14 is red) • PMs can review days old to see how tasks are doing against today's date (14 is red)
EX0015	All Tasks - SQL Server	theBasiX™	Portlet	The All Tasks portlet displays all tasks related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view tasks across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The portlet displays project actuals and estimates from the project (datamart tables).
EX0016	Allocation Compliance Column Chart - Oracle	theBasiX™	Portlet	The Allocation Compliance Column Chart portlet displays allocation compliance information for all resources within a given OBS - showing one column for each child OBS of the OBS selected. The portlet displays information in three ways: Under Allocated (less than 80%), Appropriately Allocated (between 80-120%), and Over Allocation (over 120%). Using this portlet, resource managers or the PMO will be able to glance at the chart and determine how a majority of their resources are allocated.

EX0016	Allocation Compliance Column Chart - SQL Server	theBasiX™	Portlet	The Allocation Compliance Column Chart portlet displays allocation compliance information for all resources within a given OBS - showing one column for each child OBS of the OBS selected. The portlet displays information in three ways: Under Allocated (less than 80%), Appropriately Allocated (between 80-120%), and Over Allocation (over 120%). Using this portlet, resource managers or the PMO will be able to glance at the chart and determine how a majority of their resources are allocated.
EX0017	Allocation Compliance for PM - Oracle	theWorX™	Portlet	The Allocation Compliance by Person (Project Manager) portlet gives a view of resource allocation compliance for active resources on the team of an investment the logged in user is the manager for. It allows the PM to see resources on their project over the coming months and whether they are over or under allocated. This portlet leverages the daily allocation and daily availability slices as well as only active investments. The portlet provides filters for specific dates, filtering by resource ID, and resource name may also be added.
EX0017	Allocation Compliance for PM - SQL Server	theWorX™	Portlet	The Allocation Compliance by Person (Project Manager) portlet gives a view of resource allocation compliance for active resources on the team of an investment the logged in user is the manager for. It allows the PM to see resources on their project over the coming months and whether they are over or under allocated. This portlet leverages the daily allocation and daily availability slices as well as only active investments. The portlet provides filters for specific dates, filtering by resource ID, and resource name may also be added.
EX0018	Allocation Compliance for RM - Oracle	theWorX™	Portlet	The Allocation Compliance by Resource (Resource Manager) portlet gives a view of resource allocation compliance for all active resources the logged in user is the Resource Manager for. It allows the RM to see resources they manage over the coming months and whether they are over or under allocated. This portlet leverages the daily allocation and daily availability slices as well as only active investments. The portlet provides filters for specific dates, filtering by resource ID, and resource name may also be added.
EX0018	Allocation Compliance for RM - SQL Server	theWorX™	Portlet	The Allocation Compliance by Resource (Resource Manager) portlet gives a view of resource allocation compliance for all active resources the logged in user is the Resource Manager for. It allows the RM to see resources they manage over the coming months and whether they are over or under allocated. This portlet leverages the daily allocation and daily availability slices as well as only active investments. The portlet provides filters for specific dates, filtering by resource ID, and resource name may also be added.
EX0019	Allocation Compliance Pie Chart - Oracle	theBasiX™	Portlet	The Allocation Compliance Pie Chart portlet gives a view of active resource allocation compliance for all resources displayed in a pie chart. It allows the user to the percentage of resources over, under, and adequately staffed on projects over a selected time period. This portlet leverages the daily allocation and daily availability slices as well as only active investments. The portlet provides filters for specific dates (required) and OBS.

EX0019	Allocation Compliance Pie Chart - SQL Server	theBasiX™	Portlet	The Allocation Compliance Pie Chart portlet gives a view of active resources' allocation compliance within a date range and OBS displayed in a pie chart. It allows the user to the percentage of resources over, under, and adequately staffed on projects over a selected time period. This portlet leverages the daily allocation and daily availability slices as well as only active investments. The portlet provides filters for specific dates (required) and OBS.
EX0228	Application Cost by Goal - Oracle	theWorX™	Portlet	The Application Cost by Goal portlet displays the planned cost of all active applications within a user-defined timeframe, summarized by goal in a pie chart. This portlet provides management with a quick overview of cost by goal within a year without navigating to each application individually.
EX0228	Application Cost by Goal - SQL Server	theWorX™	Portlet	The Application Cost by Goal portlet displays the planned cost of all active applications within a user-defined timeframe, summarized by goal in a pie chart. This portlet provides management with a quick overview of cost by goal within a year without navigating to each application individually.
EX0179	Application Cost by Year - Oracle	theWorX™	Portlet	The Application Cost by Year portlet displays the active application cost by year, summarized by goal. The application cost is pulled from the application's planned cost and is displayed by year, with colors representing each application goal. This portlet provides management with a quick overview of all application costs without having to navigate to each application individually.
EX0179	Application Cost by Year - SQL Server	theWorX™	Portlet	The Application Cost by Year portlet displays the active application cost by year, summarized by goal. The application cost is pulled from the application's planned cost and is displayed by year, with colors representing each application goal. This portlet provides management with a quick overview of all application costs without having to navigate to each application individually.
EX0178	Application Risk by Goal - Oracle	theWorX™	Portlet	The Application Risk by Goal portlet displays a count of active applications by goal with a subcount by risk. The graph is color-coded by risk rating: • 1-33 – Green • 34-66 – Yellow • 67-100 – Red The portlet provides a quick overview of the risk rating for each application within each goal.
EX0178	Application Risk by Goal - SQL Server	theWorX™	Portlet	The Application Risk by Goal portlet displays a count of active applications by goal with a subcount by risk. The graph is color-coded by risk rating: • 1-33 – Green • 34-66 – Yellow • 67-100 – Red The portlet provides a quick overview of the risk rating for each application within each goal.
EX0021	Assignments by Task Over Time - Oracle	theWorX™	Portlet	The Assignments by Task Over Time portlet displays all assignments by task for all resources using the timeslices. This portlet is useful for determining which tasks a user is assigned to or how many hours the user is assigned to a task. The user may filter on certain criteria that include: project name/ID, date range, resource name/ID, and resource OBS unit.
EX0021	Assignments by Task Over Time -	theWorX™	Portlet	The Assignments by Task Over Time portlet displays all assignments by task for all resources using the timeslices. This portlet is useful for determining which tasks a user is assigned to or how many hours the

	SQL Server			user is assigned to a task. The user may filter on certain criteria that include: project name/ID, date range, resource name/ID, and resource OBS unit.
EX0022	Audit Trail - Oracle	theWorX™	Portlet	The Audit Trail portlet displays information about audited attributes. It is nearly identical to the view and functionality of the “Global Audit Trail” offering on the admin side. It offers filters for the Object ID (resource internal id, project internal id, etc.), Object Name (Jim Brown, Project A, etc.), Changed By, a date range for the changed date and the operation of the change. It is capable of reporting on the following: - Object (Resource, Project, etc.) - Object Name (Jim Brown, Project A, etc.) - Parent Name (if the object were a sub-object) - Attribute code (the attribute id from the attributes list on the object) - Operation (Update, Insert, Delete) - Changed By - Old Value - New Value - Date Changed
EX0022	Audit Trail - SQL Server	theWorX™	Portlet	The Audit Trail portlet displays information about audited attributes. It is nearly identical to the view and functionality of the “Global Audit Trail” offering on the admin side. It offers filters for the Object ID (resource internal id, project internal id, etc.), Object Name (Jim Brown, Project A, etc.), Changed By, a date range for the changed date and the operation of the change. It is capable of reporting on the following: - Object (Resource, Project, etc.) - Object Name (Jim Brown, Project A, etc.) - Parent Name (if the object were a sub-object) - Attribute code (the attribute id from the attributes list on the object) - Operation (Update, Insert, Delete) - Changed By - Old Value - New Value - Date Changed
EX0133	Auto-Approve Old Timesheets - Oracle	theWorX™	Workflow Job	The Auto-Approve Old Timesheets workflow process can be run through the "Execute a Process" job, and may be used to quickly close out timesheets for a specified timeframe for period closure. The workflow will execute a query that will automatically approve ALL (no matter the status of the timesheet) timesheets that contain more than 0 hours and have a time period start date before the Approve Date specified within the process itself.
EX0133	Auto-Approve Old Timesheets - SQL Server	theWorX™	Workflow Job	The Auto-Approve Old Timesheets workflow process can be run through the "Execute a Process" job, and may be used to quickly close out timesheets for a specified timeframe for period closure. The workflow will execute a query that will automatically approve ALL (no matter the status of the timesheet) timesheets that have a time period start date before the Approve Date specified within the process itself.
EX0339	Benefits by Year - Oracle	theWorX™	Portlet	The Benefits by Year portlet displays all benefit plans within projects. The information is displayed by years, includes the cost associated cost plan, and may be used to view potential benefit over several years. The information may be filtered by date range, OBS, portfolio ID, or if the benefit plan is the plan of record.
EX0339	Benefits By Year - SQL Server	theWorX™	Portlet	The Benefits by Year portlet displays all benefit plans within projects. The information is displayed by years, includes the cost associated cost plan, and may be used to view potential benefit over several years. The information may be filtered by date range, OBS, portfolio ID, or if the benefit plan is the plan of

				record.
EX0220	Bubble Charts Quick Reference Guide - Oracle	theBasiX™	Technical Trick	The Bubble Charts Quick Reference Guide technical trick provides an administrator with a quick tutorial on configuring bubble charts' colors. Bubble charts, while providing a wealth of information, may also be very confusing to configure. Using this guide, users will be able to customize their bubble charts' colors in a few steps.
EX0220	Bubble Charts Quick Reference Guide - SQL Server	theBasiX™	Technical Trick	The Bubble Charts Quick Reference Guide technical trick provides an administrator with a quick tutorial on configuring bubble charts' colors. Bubble charts, while providing a wealth of information, may also be very confusing to configure. Using this guide, users will be able to customize their bubble charts' colors in a few steps.
EX0660	Business Objects Best Practices	theBasiX™	Training Documents	A document that outlines and explains best practices for Business Objects in CA Clarity. Content includes Implementation Plan, Initial Business Object Setup, Overall Architecture, Designer Tips & Tricks, Important Universe Parameters, Working with Tables & Joins, Classes & Objects, Migrating Universes & Reports, Maintaining & Enhancing Universes, and Upgrading Business Objects & Universes.
EX0026	Capacity Graph - Investment - Oracle	theWorX™	Portlet	The Capacity Graph - Investment portlet displays Availability, Allocations, Assignments and Actuals for active resources in a single project. This portlet pulls from timeslices and allows the user to filter on weekly, monthly, or quarterly data. This portlet provides a Project Manager with a simple way to analyze: Allocations vs. Actuals and Allocations vs. ETC. Depending on metric goals, the graph allows the user to determine where areas of improvement may exist.
EX0026	Capacity Graph - Investment - SQL Server	theWorX™	Portlet	The Capacity Graph - Investment portlet displays Availability, Allocations, Assignments and Actuals for active resources in a single project. This portlet pulls from timeslices and allows the user to filter on weekly, monthly, or quarterly data. This portlet provides a Project Manager with a simple way to analyze: Allocations vs. Actuals and Allocations vs. ETC. Depending on metric goals, the graph allows the user to determine where areas of improvement may exist.
EX0025	Capacity Graph - Oracle	theBasiX™	Portlet	The Capacity Graph portlet displays Availability, Allocations, Actuals and Assignments for one or more active resource(s) in a single view. This portlet pulls data from timeslices, and allows the user to filter on a weekly, monthly or quarterly data. The Estimated Time to Complete (ETC) and Allocation data will only show for projects that are active. This portlet provides Resource Managers, PMOs and Executives with a simple way to analyze: Allocations vs. Availability, Allocations vs. Actuals, Allocations vs. ETC and ETC vs. Availability. The graph allows the user to determine where areas of improvement may exist and quickly identify potential areas of constraint.
EX0027	Capacity Graph - Personal - Oracle	theWorX™	Portlet	The Capacity Graph - Personal portlet displays Allocation, Availability The Capacity Graph portlet displays Availability, Allocations, Actuals and Assignments for a Clarity user in a single view. This portlet pulls data

				from timeslices, and allows the user to filter on a weekly, monthly or quarterly data. The Estimated Time to Complete (ETC) and Allocation data will only show for projects that are active. This portlet provides a Clarity user with a simple way to analyse their: Allocations vs. Availability, Allocations vs. Actuals, Allocations vs. ETC and ETC vs. Availability. The graph allows the user to determine where areas of improvement may exist and quickly identify potential areas of constraint.
EX0027	Capacity Graph - Personal - SQL Server	theWorX™	Portlet	The Capacity Graph portlet displays Availability, Allocations, Actuals and Assignments for a Clarity user in a single view. This portlet pulls data from timeslices, and allows the user to filter on a weekly, monthly or quarterly data. The Estimated Time to Complete (ETC) and Allocation data will only show for projects that are active. This portlet provides a Clarity user with a simple way to analyse their: Allocations vs. Availability, Allocations vs. Actuals, Allocations vs. ETC and ETC vs. Availability. The graph allows the user to determine where areas of improvement may exist and quickly identify potential areas of constraint.
EX0025	Capacity Graph - SQL Server	theBasiX™	Portlet	The Capacity Graph portlet displays Availability, Allocations, Actuals and Assignments for one or more active resource(s) in a single view. This portlet pulls data from timeslices, and allows the user to filter on a weekly, monthly or quarterly data. The Estimated Time to Complete (ETC) and Allocation data will only show for projects that are active. This portlet provides Resource Managers, PMOs and Executives with a simple way to analyze: Allocations vs. Availability, Allocations vs. Actuals, Allocations vs. ETC and ETC vs. Availability. The graph allows the user to determine where areas of improvement may exist and quickly identify potential areas of constraint.
EX0236	Capacity Planning by Role and Skill - Oracle	theWorX™	Portlet	The Capacity Planning by Role and Skill portlet displays all availability and demand in the system summarized by role. The portlet also allows the user to drill-down further into the role and separate the hours by primary skill. This portlet leverages the timeslices, and pulls availability from resources and allocation from the team records. The user is able to narrow the results by filtering on start/finish date, time period, active projects, and active resources. Using this portlet, a resource manager can quickly determine resource needs, skill needs, and overall allocation/availability of roles.
EX0236	Capacity Planning by Role and Skill - SQL Server	theWorX™	Portlet	The Capacity Planning by Role and Skill portlet displays all availability and demand in the system summarized by role. The portlet also allows the user to drill-down further into the role and separate the hours by primary skill. This portlet leverages the timeslices, and pulls availability from resources and allocation from the team records. The user is able to narrow the results by filtering on start/finish date, time period, active projects, and active resources. Using this portlet, a resource manager can quickly determine resource needs, skill needs, and overall allocation/availability of roles.
EX0251	Capacity Planning by Skill - Oracle	theWorX™	Portlet	The Capacity Planning by Skill requires a Custom Attribute to be created on the resource Object called, Primary Skill. The custom attribute has an ID: rego_primary_skill, and a lookup to Browse Skills.

EX0251	Capacity Planning by Skill - SQL Server	theWorX™	Portlet	The Capacity Planning by Skill portlet displays the capacity and demand by skill for a selected timeframe. This portlet is used to determine which skills are in high demand, being used efficiently, and how much capacity may be remaining for the time period. The portlet may be filtered by skill name, resource OBS or project OBS to narrow the results.
EX0242	Changing Application Logo and Title - Oracle	theWorX™	Technical Trick	The Changing Application Logo and Title tech trick provides an overview of how to change the logo and title within the application. This allows administrators to rebrand Clarity to their own logo and title. By customizing the logo, employees may be more encouraged to take ownership of the tool.
EX0242	Changing Application Logo and Title - SQL Server	theWorX™	Technical Trick	The Changing Application Logo and Title tech trick provides an overview of how to change the logo and title within the application. This allows administrators to rebrand Clarity to their own logo and title. By customizing the logo, employees may be more encouraged to take ownership of the tool.
EX0239	Clarity DB Schema - Oracle	theWorX™	Portlet	The Clarity Schema portlet provides information necessary for developing new or updating existing content for Clarity Portlets, Processes, Lookups, Reports, or even Fields on an Object. It contains 400+ tables and almost 5800 fields before customizations. Developers will utilize this portlet to find the descriptions of the most used tables/fields, view available fields, and view the table joins needed when writing NSQL. In addition to the schema information, this portlet allows the user to filter by: Table Name, Field Name, Field Type, Description, and a complete set of "Groupings" that can be utilized to develop powerful views and maximize your Clarity investment. Clicking on the paperclip link next to the Table Name will show the user possible joins that can be used.
EX0239	Clarity DB Schema - SQL Server	theWorX™	Portlet	The Clarity Schema portlet provides information necessary for developing new or updating existing content for Clarity Portlets, Processes, Lookups, Reports, or even Fields on an Object. It contains 400+ tables and almost 5800 fields before customizations. Developers will utilize this portlet to find the descriptions of the most used tables/fields, view available fields, and view the table joins needed when writing NSQL. In addition to the schema information, this portlet allows the user to filter by: Table Name, Field Name, Field Type, Description, and a complete set of "Groupings" that can be utilized to develop powerful views and maximize your Clarity investment. Clicking on the paperclip link next to the Table Name will show the user possible joins that can be used.
EX0163	Clarity Hidden Pages - View and Flush Caches - Oracle	theWorX™	Technical Trick	The CA Clarity Hidden Page Flush Caches document provides an overview of how to clear the cache on an application server without exiting the CA Clarity Application itself utilizing a hidden page within the system.
EX0163	Clarity Hidden Pages - View and	theWorX™	Technical Trick	The CA Clarity Hidden Page Flush Caches document provides an overview of how to clear the cache on an application server without exiting the CA Clarity Application itself utilizing a hidden page within the

	Flush Caches - SQL Server			system.
EX0164	Clarity Hidden Pages - View and Unlock Security Locks - Oracle	theWorX™	Technical Trick	The CA Clarity Hidden Page Security Locks document provides an overview of how to view and remove the locks currently being held on the system using the Security Locks hidden page.
EX0167	Clarity Hidden Pages - View Page XML - Oracle	theWorX™	Technical Trick	The CA Clarity Hidden Page View Page XML document provides an overview of how to access a portlet pages XML for you CA Clarity application from the web.
EX0167	Clarity Hidden Pages - View Page XML - SQL Server	theWorX™	Technical Trick	The CA Clarity Hidden Page View Page XML document provides an overview of how to access a portlet pages XML for you CA Clarity application from the web.
EX0165	Clarity Hidden Pages - WSDL - Oracle	theWorX™	Technical Trick	The CA Clarity Hidden Page WSDL document provides an overview of how to access the system documentation page for you CA Clarity application from the web.
EX0165	Clarity Hidden Pages - WSDL - SQL Server	theWorX™	Technical Trick	The CA Clarity Hidden Page WSDL document provides an overview of how to access the system documentation page for you CA Clarity application from the web.
EX0166	Clarity Hidden Pages - XOG Client - SQL Server	theBasiX™	Technical Trick	The CA Clarity Hidden Page XOG Client document provides an overview of how to access a simple XOG client within the CA Clarity application. This allows simple XOG'ing of Clarity components without ever leaving the Clarity application.
EX0166	Clarity Hidden Pages - XOG Client - Oracle	theBasiX™	Technical Trick	The CA Clarity Hidden Page XOG Client document provides an overview of how to access a simple XOG client within the CA Clarity application. This allows simple XOG'ing of Clarity components without ever leaving the Clarity application.
EX0164	Clarity Hidden Pages – View and Unlock Security Locks - SQL Server	theWorX™	Technical Trick	The CA Clarity Hidden Page Security Locks document provides an overview of how to view and remove the locks currently being held on the system using the Security Locks hidden page.
EX0681	Clarity PMO Accelerator v3.0 Pack Reference	theBasiX™	Presentation (Information)	This Reference Guide details all the portlets included within the Clarity PMO Accelerator Pack v3.0. It provides a description of each portlet as well as providing an example screen shot.

	Guide			
EX0219	Clarity Portfolio Management Overview - v12	theWorX™	Training Documents	The Portfolio Management training document provides an in-depth guide to portfolio management. This presentation is designed to provide project managers or the PMO with an overview to managing, grouping, analyzing, and creating scenarios within Clarity's portfolio management module. This guide provides step-by-step instructions as well as detailed screenshots to ensure that the learning curve for your PMO team is minimal.
EX0219	Clarity Portfolio Management Overview - v13	theWorX™	Training Documents	The Portfolio Management training document provides an in-depth guide to portfolio management. This presentation is designed to provide project managers or the PMO with an overview to managing, grouping, analyzing, and creating scenarios within Clarity's portfolio management module. This guide provides step-by-step instructions as well as detailed screenshots to ensure that the learning curve for your PMO team is minimal.
EX0190	Clarity Project Management - V12	theWorX™	Training Documents	The Project Management training document provides an in-depth guide to project management. This presentation is designed to provide project managers with an overview to creating a project, inputting data, assigning roles/resources, adjust ETCs and assignments and more within Clarity's project management module. This guide provides step-by-step instructions as well as detailed screenshots to ensure that the learning curve for your project managers is minimal.
EX0190	Clarity Project Management - V13	theWorX™	Training Documents	The Project Management training document provides an in-depth guide to project management. This presentation is designed to provide project managers with an overview to creating a project, inputting data, assigning roles/resources, adjust ETCs and assignments and more within Clarity's project management module. This guide provides step-by-step instructions as well as detailed screenshots to ensure that the learning curve for your project managers is minimal.
EX0198	Clarity Resource Management - V12	theWorX™	Training Documents	The Resource Management training document provides an in-depth guide to resource management. This presentation is designed to provide resource managers with an overview to managing time, inputting users and roles, adjust allocations, availability and more within Clarity's resource management module. This guide provides step-by-step instructions as well as detailed screenshots to ensure that the learning curve for your resource managers is minimal.
EX0198	Clarity Resource Management - V13	theWorX™	Training Documents	The Resource Management training document provides an in-depth guide to resource management. This presentation is designed to provide resource managers with an overview to managing time, inputting users and roles, adjust allocations, availability and more within Clarity's resource management module. This guide provides step-by-step instructions as well as detailed screenshots to ensure that the learning curve for your resource managers is minimal.

EX0679	Clarity Solution Pack Reference Guide	theBasiX™	Presentation (Information)	This Reference Guide details all the reports and dashboards included within the Clarity Solution Pack. It provides a description of each as well as providing an example screen shot.
EX0217	Clarity Time Entry - Quick Reference Guide	theBasiX™	Training Documents	The Clarity Time Entry Quick Reference Guide is a two-page document, intended to be utilized as “quick reference” for any questions relating to Clarity Time Entry. Topics such as accessing timesheets, adding tasks to the timesheet and submitting, modifying, approving and adjusting timesheet data are covered in this two-page reference. The document may be printed and posted at your desk and referred to should any questions arise during your time entry process.
EX0199	Clarity Timesheets - Module 1: Accessing Timesheets - m4v	theBasiX™	Training Video	This video covers the process of accessing timesheets within Clarity, both as a team member and as a Project or Resource Manager.
EX0199	Clarity Timesheets - Module 1: Accessing Timesheets - wmv	theBasiX™	Training Video	This video covers the process of accessing timesheets within Clarity, both as a team member and as a Project or Resource Manager.
EX0200	Clarity Timesheets - Module 2: Adding Tasks and Entering & Submitting Time - m4v	theBasiX™	Training Video	This video covers the process of adding tasks to the timesheet using Populate and Add Task, using the timesheet notes functionality, entering timesheet data, updating ETC via the timesheet, and submitting the timesheet.
EX0200	Clarity Timesheets - Module 2: Adding Tasks and Entering & Submitting Time - wmv	theBasiX™	Training Video	This video covers the process of adding tasks to the timesheet using Populate and Add Task, using the timesheet notes functionality, entering timesheet data, updating ETC via the timesheet, and submitting the timesheet.
EX0201	Clarity Timesheets - Module 3: Approving Time - m4v	theBasiX™	Training Video	This video reviews how to return and approve Clarity timesheets as a Project or Resource Manager.
EX0201	Clarity Timesheets - Module 3: Approving Time - wmv	theBasiX™	Training Video	This video reviews how to return and approve Clarity timesheets as a Project or Resource Manager.
EX0202	Clarity Timesheets - Module 4: Adjusting	theWorX™	Training Video	This video reviews the process of creating Timesheet Adjustments – making changes to a timesheet after it has been posted.

	Time - m4v			
EX0202	Clarity Timesheets - Module 4: Adjusting Time - wmv	theWorX™	Training Video	This video reviews the process of creating Timesheet Adjustments – making changes to a timesheet after it has been posted.
EX0212	Clarity V13 Users Guide	theBasiX™	Training Documents	Overview of changes in Clarity v13.
EX0232	Communications Portlet - Complex - Oracle & SQL Server	theBasiX™	Portlet	The Communications Portlet - Complex portlet provides a detailed mechanism to communicate with Clarity users using external, internet standard, javascript libraries. The content of the portlet can be edited easily through the Portlet administration screens within Clarity. This is a very beneficial method of delivering messages to your Clarity users all at the same time.
EX0231	Communications Portlet - Simple - Oracle & SQL Server	theBasiX™	Portlet	The Communications Portlet - Simple portlet provides a simple mechanism to communicate with Clarity users. The content of the portlet can be edited easily through the Portlet administration screens within Clarity. This is a very beneficial method of delivering messages to your Clarity users all at the same time.
EX0030	Convert Incident to Task - Oracle	theWorX™	Workflow Job	The Convert Incident to Task workflow process allows users to quickly create tasks from incidents without the need to input the information twice. It utilizes a newly added checkbox and project fields on the incident object. The user will need to select the project that he or she wants the task added to using the “Project” field on the incident object. Next, the “Convert to Task” checkbox will kick off the process. Once ticked, the process will perform the necessary actions to create a task on the specified project.
EX0030	Convert Incident to Task - SQL Server	theWorX™	Workflow Job	The Convert Incident to Task workflow process allows users to quickly create tasks from incidents without the need to input the information twice. It utilizes a newly added checkbox and project fields on the incident object. The user will need to select the project that he or she wants the task added to using the “Project” field on the incident object. Next, the “Convert to Task” checkbox will kick off the process. Once ticked, the process will perform the necessary actions to create a task on the specified project.
EX0032	Creating Dependent Lookups - Oracle	theWorX™	Technical Trick	The Creating Dependent Lookups Based On Other Fields On The Same Page document provides the steps needed to allow a user to create lookups whose values are dependent on other fields on the same page. Having the ability to use a lookup field whose list of values change based on other fields values on the same page can help reduce the number of fields that might be required and provide more relevant options to the user based on other data selections.
EX0032	Creating Dependent Lookups - SQL	theWorX™	Technical Trick	The Creating Dependent Lookups Based On Other Fields On The Same Page document provides the steps needed to allow a user to create lookups whose values are dependent on other fields on the same

	Server			page. Having the ability to use a lookup field whose list of values change based on other fields values on the same page can help reduce the number of fields that might be required and provide more relevant options to the user based on other data selections.
EX0033	Current Proxies - Oracle	theWorX™	Portlet	The Current Proxies portlet provides a user with an overview of all the resources in the system currently using a proxy. This portlet is helpful to determine a proxy if a user is currently out of the office. The portlet provides several pieces of information related to the resource including: resource names, proxy, start date, end date, days remaining, total days, and if the proxy is active. The user may filter by resource name, proxy name, proxy status (defaults to Yes), and start/end dates (defaults to the current date).
EX0033	Current Proxies - SQL Server	theWorX™	Portlet	The Current Proxies portlet provides a user with an overview of all the resources in the system currently using a proxy. This portlet is helpful to determine a proxy if a user is currently out of the office. The portlet provides several pieces of information related to the resource including: resource names, proxy, start date, end date, days remaining, total days, and if the proxy is active. The user may filter by resource name, proxy name, proxy status (defaults to Yes), and start/end dates (defaults to the current date).
EX0034	Custom Attributes in System - Oracle	theWorX™	Portlet	The Custom Attributes in System portlet displays all of the custom attributes present in the system and the lookup (if applicable) associated with each. This portlet is useful finding a custom attribute on an object, auditing, or for documentation purposes. The user may narrow the results by object, data type, and last updated date.
EX0034	Custom Attributes in System - SQL Server	theWorX™	Portlet	The Custom Attributes in System portlet displays all of the custom attributes present in the system and the lookup (if applicable) associated with each. This portlet is useful finding a custom attribute on an object, auditing, or for documentation purposes. The user may narrow the results by object, data type, and last updated date.
EX0233	Custom Calendar Module - Oracle & SQL Server	theWorX™	Portlet	The Custom Calendar portlet and accompanying add-on module delivers project/program milestone and completion dates via an easy to read and navigate calendar view. Users may access and download an .ics (standard calendar format) formatted file for any event on the calendar. This file, which is recognized by most major desktop calendar applications (e.g., Outlook), allows users to add any event to their personal calendars. This portlet can be configured during install to filter events based on the security access of the logged in user, or to show all events. As configured, the module displays the following program/project dates: • Project Milestones • Project End Dates • Program End Dates This module may be customized to show additional dates. Contact us for more information.
EX0237	Custom LDAP - Oracle & SQL Server	theWorX™	Configurations & Apps	One large challenge many organizations face when deploying Clarity is how to keep user accounts up to date. This can be a very time consuming process when done manually. Clarity provides two stock LDAP jobs that can be used to create and deactivate Clarity users based on data obtained from LDAP. When a

				<p>user is created in Clarity by the stock LDAP job their First Name, Last Name, Full Name, User Name, Resource ID, and Email address are pulled into Clarity. While this gives a Clarity administrator a good start there are many other time consuming activities that go into setting up a new user with Clarity access. Many organizations have the additional information needed to fully establish a Clarity user stored in their LDAP directory but the stock job is not written to use these additional attributes. In these cases, a custom LDAP job can be written in place of, or as a supplement to, the stock LDAP jobs. A custom job eliminates the limitation of querying LDAP for only the six fields that the stock Clarity job uses. It also allows for additional logic to be applied to establish a more complete user account at the time of creation, and to keep existing information up to date. The first step is to define the business requirements around what fields are needed to establish a new user and what fields are to be kept in sync with LDAP for existing users. Common requests are to populate the resource manager, booking manager, OBS, active/inactive, open for time entry, and financial fields based on the LDAP data. Logic can be applied to add resources to selected projects based on their business unit or add users to security groups based on their group membership in LDAP. Custom names can be populated in the Clarity database in instances where professional titles are important. The Rego approach uses a GEL script that calls methods of a custom java class. The java class can be customized to query LDAP for various fields based on the business requirements. When the job is initiated the java class will read the LDAP and database connection parameters from the Clarity CSA, execute the custom LDAP query, and insert the results into a custom database table (the java class will create the table if it doesn't already exist). Once the staging table is populated with LDAP data the job will determine which records do not exist in Clarity. It will build and execute a XOG that will add the user/resource records to the database. The next steps are determined by the business requirements but typically involve updating existing records using XOG or SQL.</p>
EX0036	Custom License Count - Oracle	theWorX™	Portlet	<p>The Custom License Count portlet displays the license type and amount of users with each type of license. This portlet can be modified by adjusting the query to exclude certain rights within manager licenses based on negotiated license types with CA. For example, if CA allows creation of a subobject to Incident to be included in a Team Member license, this portlet can be used to reflect the true license counts vs. the standard CA license counts.</p>
EX0036	Custom License Count - SQL Server	theWorX™	Portlet	<p>The Custom License Count portlet displays the license type and amount of users with each type of license. This portlet can be modified by adjusting the query to exclude certain rights within manager licenses based on negotiated license types with CA. For example, if CA allows creation of a subobject to Incident to be included in a Team Member license, this portlet can be used to reflect the true license counts vs. the standard CA license counts.</p>
EX0037	Custom License Count Detail - Oracle	theWorX™	Portlet	<p>The Custom License Count Detail portlet displays the license type information for all users within Clarity as well as last login date for clean-up. This portlet can be modified by adjusting the query to exclude</p>

				certain rights within manager licenses based on negotiated license types with CA. For example, if CA allows creation of a subobject to Incident to be included in a Team Member license, this portlet can be used to reflect the true license counts vs. the standard CA license counts.
EX0037	Custom License Count Detail - SQL Server	theWorX™	Portlet	The Custom License Count Detail portlet displays the license type information for all users within Clarity as well as last login date for clean-up. This portlet can be modified by adjusting the query to exclude certain rights within manager licenses based on negotiated license types with CA. For example, if CA allows creation of a subobject to Incident to be included in a Team Member license, this portlet can be used to reflect the true license counts vs. the standard CA license counts.
EX0038	Custom Portlet Configs - Oracle	theWorX™	Portlet	The Custom Portlet Configs portlet will display all portlets where the user has modified any settings like the filter or list views. This portlet is helpful for troubleshooting and to determine which users may be affected during an upgrade. The portlet may be filtered by several criteria and displays the resource name, ID, OBS path, portlet, and portlet ID.
EX0038	Custom Portlet Configs - SQL Server	theWorX™	Portlet	The Custom Portlet Configs portlet will display all portlets where the user has modified any settings like the filter or list views. This portlet is helpful for troubleshooting and to determine which users may be affected during an upgrade. The portlet may be filtered by several criteria and displays the resource name, ID, OBS path, portlet, and portlet ID.
EX0039	Dashboard: Baseline Comparison - Oracle	theWorX™	Portlet	The Dashboard: Baseline Comparison portlet compares multiple baselines on a single project. The portlet is added to the dashboard page of a project and will pull in baselines for that project and perform a comparison between them. This portlet provides a quick way for project managers to view the differences between their baselines, especially if they have multiple members updating the project.
EX0039	Dashboard: Baseline Comparison - SQL Server	theWorX™	Portlet	The Dashboard: Baseline Comparison portlet compares multiple baselines on a single project. The portlet is added to the dashboard page of a project and will pull in baselines for that project and perform a comparison between them. This portlet provides a quick way for project managers to view the differences between their baselines, especially if they have multiple members updating the project.
EX0137	Dashboard: Change Requests - Oracle	theBasiX™	Portlet	The Dashboard: Change Requests portlet gives an overview of all change requests on the project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet sorts the issues first by priority and then by target date. It displays the name, owner, status, target date, approved by, and the priority.
EX0137	Dashboard: Change Requests - SQL Server	theBasiX™	Portlet	The Dashboard: Change Requests portlet gives an overview of all change requests on the project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet sorts the issues first by priority and then by target date. It displays the name, owner, status, target date, approved by, and the priority.

EX0138	Dashboard: Financial Summary by Charge Code - Oracle	theWorX™	Portlet	The Dashboard: Financial Summary by Charge Code portlet displays financial information from the project summarized by Charge Code. The portlet is added to the dashboard page of a project and will pull all actuals by charge code on the project. The user may filter by date range to narrow the results.
EX0138	Dashboard: Financial Summary by Charge Code - SQL Server	theWorX™	Portlet	The Dashboard: Financial Summary by Charge Code portlet displays financial information from the project summarized by Charge Code. The portlet is added to the dashboard page of a project and will pull all actuals by charge code on the project. The user may filter by date range to narrow the results.
EX0139	Dashboard: Open Issues - Oracle	theBasiX™	Portlet	The Dashboard: Open Issues portlet gives an overview of all issues that are not closed or resolved for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet sorts the issues first by priority and then by target date. It displays the name, target date, owner, status and priority.
EX0139	Dashboard: Open Issues - SQL Server	theBasiX™	Portlet	The Dashboard: Open Issues portlet gives an overview of all issues that are not closed or resolved for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet sorts the issues first by priority and then by target date. It displays the name, target date, owner, status and priority.
EX0140	Dashboard: Open Milestones - Oracle	theBasiX™	Portlet	The Dashboard: Open Milestones portlet gives an overview of all milestones that are started or not started for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The milestones are sorted by Due Date. It displays the name, Due Date, Baseline Date, Days Late (Due Date – Baseline Date), and Days Old (Current Date – Due Date).
EX0140	Dashboard: Open Milestones - SQL Server	theBasiX™	Portlet	The Dashboard: Open Milestones portlet gives an overview of all milestones that are started or not started for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The milestones are sorted by Due Date. It displays the name, Due Date, Baseline Date, Days Late (Due Date – Baseline Date), and Days Old (Current Date – Due Date).
EX0141	Dashboard: Open Risks - Oracle	theBasiX™	Portlet	The Dashboard: Open Risks portlet gives an overview of all risks that are not closed or resolved for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet sorts the risks first by priority and then by target date. It displays the name, owner, target date, probability impact, and priority.
EX0141	Dashboard: Open Risks - SQL Server	theBasiX™	Portlet	The Dashboard: Open Risks portlet gives an overview of all risks that are not closed or resolved for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet sorts the risks first by priority and then by target date. It displays the

				name, owner, target date, probability impact, and priority.
EX0142	Dashboard: Phase Gantt - Oracle	theBasiX™	Portlet	The Dashboard: Phase Gantt portlet gives an overview of all WBS level 1 tasks or milestones for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet displays the name, and a graphical representation of the timeline for the phases. The date range may be configured by day, month, year, or quarter. The start date may also be configured to any date or a relative date (start of current month, start of next year, etc).
EX0142	Dashboard: Phase Gantt - SQL Server	theBasiX™	Portlet	The Dashboard: Phase Gantt portlet gives an overview of all WBS level 1 tasks or milestones for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet displays the name, and a graphical representation of the timeline for the phases. The date range may be configured by day, month, year, or quarter. The start date may also be configured to any date or a relative date (start of current month, start of next year, etc).
EX0041	Dashboard: Programs Portfolios - Oracle	theWorX™	Portlet	The Dashboard: Programs Portfolios portlet is placed on the dashboard page of a project. This portlet will show any programs or portfolios the project is a subproject of. The portlet will display the name, code, connection type, manager, and start/finish dates.
EX0041	Dashboard: Programs Portfolios - SQL Server	theWorX™	Portlet	The Dashboard: Programs Portfolios portlet is placed on the dashboard page of a project. This portlet will show any programs or portfolios the project is a subproject of. The portlet will display the name, code, connection type, manager, and start/finish dates.
EX0160	Dashboard: Project Information - Oracle	theBasiX™	Portlet	The Dashboard: Project Information portlet gives a set of high level information about the project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet displays the name, project ID, project manager, description, start date, finish date, baseline start, and baseline finish.
EX0160	Dashboard: Project Information - SQL Server	theBasiX™	Portlet	The Dashboard: Project Information portlet gives a set of high level information about the project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet displays the name, project ID, project manager, description, start date, finish date, baseline start, and baseline finish.
EX0157	Dashboard: Project Status Indicators Multi-line - Oracle	theBasiX™	Portlet	The Dashboard: Project Status Mult-line portlet gives an overview of the project overall status as well as the status indicators on the "current" status report object. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. This portlet displays each type of status, the symbol related to the severity, and the explanation for the status across multiple lines in the portlet.
EX0157	Dashboard: Project	theBasiX™	Portlet	The Dashboard: Project Status Mult-line portlet gives an overview of the project overall status as well as

	Status Indicators Multi-line - SQL Server			the status indicators on the "current" status report object. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. This portlet displays each type of status, the symbol related to the severity, and the explanation for the status across multiple lines in the portlet.
EX0158	Dashboard: Project Status Indicators Single-line - Oracle	theBasiX™	Portlet	The Dashboard: Project Status Single-line portlet gives an overview of the project overall status as well as the status indicators on the "current" status report object. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. This portlet displays the report date, symbols relating to the overall status, scope, schedule, cost/effort, and the overall explanation across a single line in the portlet.
EX0158	Dashboard: Project Status Indicators Single-line - SQL Server	theBasiX™	Portlet	The Dashboard: Project Status Single-line portlet gives an overview of the project overall status as well as the status indicators on the "current" status report object. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. This portlet displays the report date, symbols relating to the overall status, scope, schedule, cost/effort, and the overall explanation across a single line in the portlet.
EX0042	Data Issues - Projects - Oracle	theBasiX™	Portlet	The Project Data Issues portlet is used to identify data exceptions related to project setup. This portlet helps to identify where projects are missing key data or are possibly sitting in an exception state. This view will show projects that have one or many exceptions, including inactive projects. The user may also narrow the results by project, OBS, or project type.
EX0042	Data Issues - Projects - SQL Server	theBasiX™	Portlet	The Project Data Issues portlet is used to identify data exceptions related to project setup. This portlet helps to identify where projects are missing key data or are possibly sitting in an exception state. This view will show projects that have one or many exceptions, including inactive projects. The user may also narrow the results by project, OBS, or project type.
EX0043	Data Issues - Resource - Oracle	theBasiX™	Portlet	The Resource Data Issues portlet is used to identify data exceptions related to resource setup. This portlet helps to identify where resources are missing key data or are possibly sitting in an exception state. This view will show resources that have one or many exceptions, including inactive resources. There is no security built into this portlet - all resources will show. The only required field in the filter is Days, which is the number of days since the user last logged in. The user may also narrow the results by resource, OBS, or project type.
EX0043	Data Issues - Resource -SQL Server	theBasiX™	Portlet	The Resource Data Issues portlet is used to identify data exceptions related to resource setup. This portlet helps to identify where resources are missing key data or are possibly sitting in an exception state. This view will show resources that have one or many exceptions, including inactive resources. There is no security built into this portlet - all resources will show. The only required field in the filter is Days, which is

				the number of days since the user last logged in. The user may also narrow the results by resource, OBS, or project type.
EX0662	Direct Linking to Files V13	theWorX™	Technical Trick	This 'Tech Trick' demonstrates how to link files located within the Knowledge Store directly to an HTML Portlet in Clarity.
EX0044	Email Process Instance Errors - Oracle	theWorX™	Workflow Job	The Email Process Instance Errors workflow process will email a selected group within Clarity informing them of process errors that are currently in the system. The selected group is input through a gel parameter so it may be easily changed. This workflow helps to resolve errors quickly by emailing group members of the errors within the system so they may take action immediately.
EX0044	Email Process Instance Errors - SQL Server	theWorX™	Workflow Job	The Email Process Instance Errors workflow process will email a selected group within Clarity informing them of process errors that are currently in the system. The selected group is input through a gel parameter so it may be easily changed. This workflow helps to resolve errors quickly by emailing group members of the errors within the system so they may take action immediately.
EX0670	Enhanced (V13) Time Tracking Stalker - Resource - Oracle	theWorX™	Workflow Job	The Time Tracking Stalker – Resource v13 workflow process is used to notify resources who failed to submit a timesheet for the prior time period they must take action. The workflow checks for active resources (by using the hire and termination dates, their track mode and that they are open for time entry). Each resource who meet the criteria receives an email asking them to submit their outstanding timesheet(s). The email includes a hyperlinked table that contains this information: time period, timesheet status and any hours currently saved on the timesheet. All outstanding timesheets are included in the table. This process helps to ensure the timely submission of timesheets.
EX0670	Enhanced (V13) Time Tracking Stalker - Resource - SQL Server	theWorX™	Workflow Job	The Time Tracking Stalker – Resource v13 workflow process is used to notify resources who failed to submit a timesheet for the prior time period they must take action. The workflow checks for active resources (by using the hire and termination dates, their track mode and that they are open for time entry). Each resource who meet the criteria receives an email asking them to submit their outstanding timesheet(s). The email includes a hyperlinked table that contains this information: time period, timesheet status and any hours currently saved on the timesheet. All outstanding timesheets are included in the table. This process helps to ensure the timely submission of timesheets.
EX0673	Enhanced (V13) Time Tracking Stalker - RM - Oracle	theWorX™	Workflow Job	The Time Tracking Stalker – RM v13 workflow process automatically sends a single email to Resource Managers which contains a list of any of their resources that have not submitted their timesheet for a prior open time period. The email informs the RM if their resources are submitting their timesheets on time. The email includes a hyperlinked table that provides this information for each resource: Resource Name, Time Period, Timesheet Status and Total Hours saved on the timesheet. These notifications will help to ensure that time is being posted and approved in a timely manner.

EX0673	Enhanced (V13) Time Tracking Stalker - RM - SQL Server	theWorX™	Workflow Job	The Time Tracking Stalker – RM v13 workflow process automatically sends a single email to Resource Managers which contains a list of any of their resources that have not submitted their timesheet for a prior open time period. The email informs the RM if their resources are submitting their timesheets on time. The email includes a hyperlinked table that provides this information for each resource: Resource Name, Time Period, Timesheet Status and Total Hours saved on the timesheet. These notifications will help to ensure that time is being posted and approved in a timely manner.
EX0252	Excel Document Writer	theWorX™	Technical Trick	The Excel Document Writer is a C# application to create interim Excel files that would be used to manage projects while the Clarity instance would otherwise be unavailable. The application takes connection information and a query and creates a separate Excel file for every row in the result. Using this program, administrators will be able to access Clarity data and export it to an Excel file while the application is unavailable.
EX0045	Executive Dashboard - Oracle	theBasiX™	Portlet	The Executive Dashboard portlet displays information regarding projects the user has access to. It provides a one-stop place for the PMO or management to view all critical information about projects. The portlet not only displays status indicators as well as dates for late items, variances and days late, but also displays the project status fields from the Status Report sub-object.
EX0045	Executive Dashboard - SQL Server	theBasiX™	Portlet	The Executive Dashboard portlet displays information regarding projects the user has security rights to view. It provides a one-stop place for the PMO or management to view all critical information about projects. The portlet not only displays status indicators as well as dates for late items, variances and days late, but also displays the project status fields from the Status Report subobject.
EX0243	Financial Summary by Charge Code - Graph - Oracle	theWorX™	Portlet	The Financial Summary by Charge Code - Graph portlet displays yearly charge code financial information across all projects in a bar graph. This portlet provides management with a snapshot of all projects' financial information totaled and sorted by expense, capital, depreciation, benefit, and net cash flow. The depreciation is calculated based on a straight line method. The user may filter on OBS unit and/or portfolio to narrow down the search results.
EX0243	Financial Summary by Charge Code - Graph - SQL Server	theWorX™	Portlet	The Financial Summary by Charge Code - Graph portlet displays yearly charge code financial information across all projects in a bar graph. This portlet provides management with a snapshot of all projects' financial information totaled and sorted by expense, capital, depreciation, benefit, and net cash flow. The depreciation is calculated based on a straight line method. The user may filter on OBS unit and/or portfolio to narrow down the search results.
EX0241	Financial Summary by Charge Code - Graph Stacked -	theWorX™	Portlet	The Financial Summary by Charge Code – Graph Stacked portlet displays yearly charge code financial information across all projects in a stacked bar graph. This portlet provides management with a snapshot of all projects' financial information totaled and sorted by expense, capital, depreciation, benefit, and net

	Oracle			cash flow. The depreciation is calculated based on a straight-line method. The user may filter on OBS unit and/or portfolio to narrow down the search results.
EX0241	Financial Summary by Charge Code - Graph Stacked - SQL Server	theWorX™	Portlet	The Financial Summary by Charge Code – Graph Stacked portlet displays yearly charge code financial information across all projects in a stacked bar graph. This portlet provides management with a snapshot of all projects' financial information totaled and sorted by expense, capital, depreciation, benefit, and net cash flow. The depreciation is calculated based on a straight-line method. The user may filter on OBS unit and/or portfolio to narrow down the search results.
EX0254	Financial Summary by Charge Code - Grid - Oracle	theWorX™	Portlet	The Financial Summary by Charge Code – Grid portlet displays yearly charge code financial information across all projects. This portlet provides management with a snapshot of all projects' financial information totaled and sorted by expense, capital, depreciation, benefit, and net cash flow. The depreciation is calculated based on a straight-line method. The user may filter on OBS unit and/or portfolio to narrow down the search results.
EX0254	Financial Summary by Charge Code - Grid - SQL Server	theWorX™	Portlet	The Financial Summary by Charge Code – Grid portlet displays yearly charge code financial information across all projects. This portlet provides management with a snapshot of all projects' financial information totaled and sorted by expense, capital, depreciation, benefit, and net cash flow. The depreciation is calculated based on a straight-line method. The user may filter on OBS unit and/or portfolio to narrow down the search results.
EX0244	Financial Summary by Transaction Class - Graph - Oracle	theWorX™	Portlet	The Financial Summary by Transaction Class - Graph provides a visual graph for each years financial picture beginning with current year and going forward into the future. It will show the user where they need to concentrate their efforts in order to meet financial commitments.
EX0244	Financial Summary by Transaction Class - Graph - SQL Server	theWorX™	Portlet	The Financial Summary by Transaction Class - Graph provides a visual graph for each years financial picture beginning with current year and going forward into the future. It will show the user where they need to concentrate their efforts in order to meet financial commitments.
EX0250	Financially Enable Roles - Oracle	theWorX™	Configurations & Apps	The Financially Enable Roles modification provides the steps needed to financially enable roles. Utilizing this modification, project managers are able to estimate cost plans by staffing a role that is financially enabled. The document outlines all steps needed to financially enable roles; including the lookup, object, attributes, and processes.
EX0250	Financially Enabled Roles - SQL Server	theWorX™	Configurations & Apps	The Financially Enable Roles modification provides the steps needed to financially enable roles. Utilizing this modification, project managers are able to estimate cost plans by staffing a role that is financially enabled. The document outlines all steps needed to financially enable roles; including the lookup, object, attributes, and processes.

EX0191	General Overview & Navigation - Clarity V12	theBasiX™	Training Documents	The General Overview and Navigation training document provides a high-level overview of navigating and understanding basic screens within Clarity. This document is helpful for adjusting new users to the different functionality and screens the user may encounter during daily usage of the system. The guide provides information on how to login to the system, navigate pages, portlets and functions, icon explanation, account settings and altering notifications within the system.
EX0191	General Overview & Navigation - Clarity V13	theBasiX™	Training Documents	The General Overview and Navigation training document provides a high-level overview of navigating and understanding basic screens within Clarity. This document is helpful for adjusting new users to the different functionality and screens the user may encounter during daily usage of the system. The guide provides information on how to login to the system, navigate pages, portlets and functions, icon explanation, account settings and altering notifications within the system.
EX0050	Grant Approve Time to Proxy - Oracle	theWorX™	Workflow Job	The Grant Approve Time to Proxy process utilizes the proxy feature within Clarity to assign timesheet approval and edit rights to a proxy for any resources that the user is the current resource manager for. The process, when run, will also remove any timesheet approval and edit rights for any users if the proxy has been removed or the resource manager has changed. This process is used for resource managers that will be out of the office.
EX0050	Grant Approve Time to Proxy - SQL Server	theWorX™	Workflow Job	The Grant Approve Time to Proxy process utilizes the proxy feature within Clarity to assign timesheet approval and edit rights to a proxy for any resources that the user is the current resource manager for. The process, when run, will also remove any timesheet approval and edit rights for any users if the proxy has been removed or the resource manager has changed. This process is used for resource managers that will be out of the office.
EX0143	Grant Booking Manager Rights to Book Resources - Oracle	theWorX™	Workflow Job	The Grant Booking Manager Rights to Book Resources workflow provides a resource's Booking Manager with the rights to hard book a resource to a project. This workflow will remove unused rights, and then grant the rights needed to allow for booking of resources. The workflow also has the ability to add rights to not only the resource but also the resource manager, and resources that are assigned as proxies. If this functionality is not needed, it can easily be removed.
EX0143	Grant Booking Manager Rights to Book Resources - SQL Server	theWorX™	Workflow Job	The Grant Booking Manager Rights to Book Resources workflow provides a resource's Booking Manager with the rights to hard book a resource to a project. This workflow will remove unused rights, and then grant the rights needed to allow for booking of resources. The workflow also has the ability to add rights to not only the resource but also the resource manager, and resources that are assigned as proxies. If this functionality is not needed, it can easily be removed.
EX0051	Grant Edit Skill and Calendar Rights -	theWorX™	Workflow Job	The Grant Edit Skill and Calendar workflow process grants the ability for the user's proxy, resource manager, booking manager, and resource(s) to edit both the skill and calendar sections. The query can be

	Oracle			easily modified to remove any of the users that receive the ability. For example, some organizations may only want to grant these rights to resource managers and his or her proxy. This workflow simplifies the task or updating a resource's calendar or skill set by allowing multiple people to govern them. Not only will the workflow add in any new rights, but it will also check for rights that no longer exist (resource manager has changed, etc).
EX0051	Grant Edit Skill and Calendar Rights - SQL Server	theWorX™	Workflow Job	The Grant Edit Skill and Calendar workflow process grants the ability for the user's resource manager, booking manager, and resource(s) to edit both the skill and calendar sections. The query can be easily modified to remove any of the users that receive the ability.
EX0052	Grant Edit Time to Proxy - Oracle	theWorX™	Workflow Job	The Grant Edit Time to Proxy process utilizes the proxy feature within Clarity to assign timesheet edit rights to a proxy for any resources that the user is the current resource manager for. The process, when run, will also remove any timesheet edit rights for any users if the proxy has been removed or the resource manager has changed. This process would allow a resource manager to designate a subordinate the ability to enter time on other resources' behalf while still going to the resource manager for approval.
EX0052	Grant Edit Time to Proxy - SQL Server	theWorX™	Workflow Job	The Grant Edit Time to Proxy process utilizes the proxy feature within Clarity to assign timesheet edit rights to a proxy for any resources that the user is the current resource manager for. The process, when run, will also remove any timesheet edit rights for any users if the proxy has been removed or the resource manager has changed. This process would allow a resource manager to designate a subordinate the ability to enter time on other resources' behalf while still going to the resource manager for approval.
EX0144	Grant PM Collaboration Manager Rights - Oracle	theBasiX™	Workflow Job	The Grant PM Collaboration Manager Rights workflow process can be run through the "Execute a Process" job. The workflow will execute a query that gives a Project Manager the Collaboration Manager rights to their projects. Often times, PMs are not set as Collaboration Managers when the project is created. This script can be run to automatically give a PM the Collaboration Manager rights to their projects, without having to go through the projects one by one.
EX0144	Grant PM Collaboration Manager Rights - SQL Server	theBasiX™	Workflow Job	The Grant PM Collaboration Manager Rights workflow process can be run through the "Execute a Process" job. The workflow will execute a query that gives a Project Manager the Collaboration Manager rights to their projects. Often times, PMs are not set as Collaboration Managers when the project is created. This script can be run to automatically give a PM the Collaboration Manager rights to their projects, without having to go through the projects one by one.
EX0053	Grant Project Edit Rights - Oracle	theWorX™	Workflow Job	The Grant Project Edit Rights workflow process allows a project manager to grant project edit rights to another user without contacting an administrator. The workflow uses the Out-of-the-box field for Business Owner. The script starts when the field is updated. It will assign project edit rights to whichever user is added to the Business Owner field. This process can be modified to grant project edit rights to any user



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				within a project field.
EX0053	Grant Project Edit Rights - SQL Server	theWorX™	Workflow Job	The Grant Project Edit Rights workflow process allows a project manager to grant project edit rights to another user without contacting an administrator. The workflow uses the Out-of-the-box field for Business Owner. The script starts when the field is updated. It will assign project edit rights to whichever user is added to the Business Owner field. This process can be modified to grant project edit rights to any user within a project field.
EX0257	Grant Resources Timesheet Edit Rights - Oracle	theWorX™	Workflow Job	The Grant Resources Timesheet Edit Rights process will grant each resource timesheet edit instance rights to his or her own timesheets. This process will not remove any existing timesheet edit instance rights.
EX0257	Grant Resources Timesheet Edit Rights - SQL Server	theWorX™	Workflow Job	The Grant Resources Timesheet Edit Rights process will grant each resource timesheet edit instance rights to his or her own timesheets. This process will not remove any existing timesheet edit instance rights.
EX0054	Grant RM Calendar & Time Rights - Oracle	theWorX™	Workflow Job	The Grant RM Calendar & Time Rights workflow process can be run through the "Execute a Process" job. The workflow will execute a query that gives a Resource Manager Calendar Edit and Timesheet Edit rights for their resources. These rights are not inherent for Resource Managers when they are named as an individual's resource manager.
EX0054	Grant RM Calendar & Time Rights - SQL Server	theWorX™	Workflow Job	The Grant RM Calendar & Time Rights workflow process can be run through the "Execute a Process" job. The workflow will execute a query that gives a Resource Manager Calendar Edit and Timesheet Edit rights for their resources. These rights are not inherent for Resource Managers when they are named as an individual's resource manager.
EX0055	Grant RM Timesheet Edit Rights - Oracle	theWorX™	Workflow Job	The Grant RM Timesheet Edit Rights workflow process can be run through the "Execute a Process" job. The workflow will execute a query that gives a Resource Manager Timesheet Edit rights for their resources. Timesheet Edit rights are not inherent for Resource Managers when they are named as an individual's resource manager.
EX0055	Grant RM Timesheet Edit Rights - SQL Server	theWorX™	Workflow Job	The Grant RM Timesheet Edit Rights workflow process can be run through the "Execute a Process" job. The workflow will execute a query that gives a Resource Manager Timesheet Edit rights for their resources. Timesheet Edit rights are not inherent for Resource Managers when they are named as an individual's resource manager.
EX0249	Grant Team Project Edit Rights - Oracle	theWorX™	Workflow Job	The Grant Team Project Edit Rights workflow allows a project manager to grant Project – Edit Management rights to all users staffed on the project. This workflow saves not only the project manager time by allowing all users on the project to update information, but also saves the administrator time from

				granting each resource these rights individually. The process will also remove any rights from members that have been removed from the project.
EX0249	Grant Team Project Edit Rights - SQL Server	theWorX™	Workflow Job	The Grant Team Project Edit Rights workflow allows a project manager to grant Project - Edit Management rights to all users staffed on the project. This workflow saves not only the project manager time by allowing all users on the project to update information, but also saves the administrator time from granting each resource these rights individually. The process will also remove any rights from members that have been removed from the project.
EX0255	Hours and Cost by Vendor - Graph - Oracle	theWorX™	Portlet	The Hours and Cost by Vendor - Graph portlet displays vendor hour or costs by month. Using this portlet, management is provided with a graphical representation of vendor costs or hours by month for a set of time without running a report or navigating to each resource individually. This portlet uses the monthly actual timeslices. Additionally, the user must select a date range and whether to display hours or costs. Once populated, the graph will display all vendors that currently have hours and cost for the selected date range.
EX0255	Hours and Cost by Vendor - Graph - SQL Server	theWorX™	Portlet	The Hours and Cost by Vendor - Graph portlet displays vendor hour or costs by month. Using this portlet, management is provided with a graphical representation of vendor costs or hours by month for a set of time without running a report or navigating to each resource individually. This portlet uses the monthly actual timeslices. Additionally, the user must select a date range and whether to display hours or costs. Once populated, the graph will display all vendors that currently have hours and cost for the selected date range.
EX0256	Hours and Cost by Vendor - Grid - Oracle	theWorX™	Portlet	The Hours and Cost by Vendor - Grid portlet displays vendor hour or costs by month grouped by vendor. Using this portlet, management is provided with a quick overview of vendor costs or hours by month for a set of time without running a report or navigating to each resource individually. This portlet uses the monthly actual timeslices. The user may filter by vendor, vendor ID, date, and hours/cost in addition to the start/finish and hours/cost. Once populated, the grid will display all vendors that currently have hours/cost for the selected time frame.
EX0256	Hours and Cost by Vendor - Grid - SQL Server	theWorX™	Portlet	The Hours and Cost by Vendor - Grid portlet displays vendor hour or costs by month grouped by vendor. Using this portlet, management is provided with a quick overview of vendor costs or hours by month for a set of time without running a report or navigating to each resource individually. This portlet uses the monthly actual timeslices. The user may filter by vendor, vendor ID, date, and hours/cost in addition to the start/finish and hours/cost. Once populated, the grid will display all vendors that currently have hours/cost for the selected time frame.
EX0057	Inactive Resource	theWorX™	Portlet	The Inactive Resource Data Cleanup portlet displays information for inactive resources that still have

	Data Clean Up - SQL Server			pending items on active objects: • Inactive User is the Project Manager • Inactive User is the Idea Manager • Inactive User is the Resource Manager • Tasks assigned to the user • Action items assigned to the user • Risks assigned to the user • Issues assigned to the user • Change requests assigned to the user Incidents assigned to the user
EX0057	Inactive Resource Data Clean-up - Oracle	theWorX™	Portlet	The Inactive Resource Data Cleanup portlet displays information for inactive resources that still have pending items on active objects: • Inactive User is the Project Manager • Inactive User is the Idea Manager • Inactive User is the Resource Manager • Tasks assigned to the user • Action items assigned to the user • Risks assigned to the user • Issues assigned to the user • Change requests assigned to the user • Incidents assigned to the user
EX0058	Incident Dashboard - Oracle	theWorX™	Configurations & Apps	The Incident Dashboard provides users with a quick overview of information on the incident and any tasks created from that incident to avoid navigation between the incident and project. The link to this dashboard is placed on the Incident object. Once clicked, three different portlets will be displayed: • The Incident Dashboard – Details portlet displays an overview of information about the incident. • The Incident Dashboard – Notes portlet displays any notes that are present in the Incident. • The Incident Dashboard – Assignments shows any assignments that have been created from the Incident.
EX0058	Incident Dashboard - SQL Server	theWorX™	Configurations & Apps	The Incident Dashboard provides users with a quick overview of information on the incident and any tasks created from that incident to avoid navigation between the incident and project. The link to this dashboard is placed on the Incident object. Once clicked, three different portlets will be displayed: • The Incident Dashboard – Details portlet displays an overview of information about the incident. • The Incident Dashboard – Notes portlet displays any notes that are present in the Incident. • The Incident Dashboard – Assignments shows any assignments that have been created from the Incident.
EX0059	Incident Notes - Oracle	theWorX™	Portlet	The Incident Notes portlet displays all of the notes that have been entered against Incidents in a single view. This allows users to more efficiently look at the notes, regardless of security rights, without having to enter each incident individually to view them.
EX0059	Incident Notes - SQL Server	theWorX™	Portlet	The Incident Notes portlet displays all of the notes that have been entered against Incidents in a single view. This allows users to more efficiently look at the notes, regardless of security rights, without having to enter each incident individually to view them.
EX0060	Incident Trending - Oracle	theWorX™	Portlet	The Incident Trending portlet all opened and closed incidents within a certain time frame. This portlet will show trends in incidents over previous months and allows for analysis of as to the root cause in a spike of incidents. The information may be filtered by date range, urgency and priority.
EX0060	Incident Trending - SQL Server	theWorX™	Portlet	The Incident Trending portlet all opened and closed incidents within a certain time frame. This portlet will show trends in incidents over previous months and allows for analysis of as to the root cause in a spike of

				incidents. The information may be filtered by date range, urgency and priority.
EX0184	Introduction to Clarity - Module 10: Configure the Overview Page - .m4v	theBasiX™	Training Video	This final video in the Introduction to Clarity video series reviews how to configure the Overview: General page. The process to add and remove portlets is discussed, along with how to create new custom tabs, to which portlets may be added.
EX0184	Introduction to Clarity - Module 10: Configure the Overview Page - .wmv	theBasiX™	Training Video	This final video in the Introduction to Clarity video series reviews how to configure the Overview: General page. The process to add and remove portlets is discussed, along with how to create new custom tabs, to which portlets may be added.
EX0169	Introduction to Clarity - Module 1: Clarity Components - .m4v	theBasiX™	Training Video	This video describes Clarity Components (modules) in a Powerpoint Slide Deck with Voice Over. It may be used as a high-level introduction to the various Clarity Modules.
EX0169	Introduction to Clarity - Module 1: Clarity Components - .wmv	theBasiX™	Training Video	This video describes Clarity Components (modules) in a Powerpoint Slide Deck with Voice Over. It may be used as a high-level introduction to the various Clarity Modules.
EX0170	Introduction to Clarity - Module 2: Navigating the Clarity User Interface - .m4v	theBasiX™	Training Video	This video instructs the user how to navigate the Clarity User Interface.
EX0170	Introduction to Clarity - Module 2: Navigating the Clarity User Interface - .wmv	theBasiX™	Training Video	This video instructs the user how to navigate the Clarity User Interface.
EX0171	Introduction to Clarity - Module 3: The Organizer -	theBasiX™	Training Video	This video instructs the user on use of Clarity's Organizer, including the Action Items, Tasks, Calendar, Processes and Notifications tabs.

	.m4v			
EX0171	Introduction to Clarity - Module 3: The Organizer - .wmv	theBasiX™	Training Video	This video instructs the user on use of Clarity's Organizer, including the Action Items, Tasks, Calendar, Processes and Notifications tabs.
EX0172	Introduction to Clarity - Module 4: List Views and Filters - .m4v	theBasiX™	Training Video	This video instructs the user on the use of Clarity's List Views, and how to use the filter associated with a list view.
EX0172	Introduction to Clarity - Module 4: List Views and Filters - .wmv	theBasiX™	Training Video	This video instructs the user on the use of Clarity's List Views, and how to use the filter associated with a list view.
EX0173	Introduction to Clarity - Module 5: Actions Drop Down - .m4v	theBasiX™	Training Video	This video provides an overview of the options found in the Actions Drop Down Menu, including Configure, Gantt, Multisort, Export to Excel, Export to PowerPoint and Edit Mode.
EX0173	Introduction to Clarity - Module 5: Actions Drop Down - .wmv	theBasiX™	Training Video	This video provides an overview of the options found in the Actions Drop Down Menu, including Configure, Gantt, Multisort, Export to Excel, Export to PowerPoint and Edit Mode.
EX0177	Introduction to Clarity - Module 6: Account Settings - .m4v	theBasiX™	Training Video	This video provides an overview of the options available via the Account Settings link in the left navigation, including Personal Information, Proxy, Font Settings, Notifications and Software Downloads.
EX0177	Introduction to Clarity - Module 6: Account Settings - .wmv	theBasiX™	Training Video	This video provides an overview of the options available via the Account Settings link in the left navigation, including Personal Information, Proxy, Font Settings, Notifications and Software Downloads.
EX0181	Introduction to Clarity - Module 7:	theBasiX™	Training Video	This video provides an overview of the Notifications functionality within Clarity. It includes details on accessing Notifications from the Notifications portlet on the overview screen, or from the organizer.

	Notifications - .m4v			Notifications preferences within Account Settings are also discussed.
EX0181	Introduction to Clarity - Module 7: Notifications - .wmv	theBasiX™	Training Video	This video provides an overview of the Notifications functionality within Clarity. It includes details on accessing Notifications from the Notifications portlet on the overview screen, or from the organizer. Notifications preferences within Account Settings are also discussed.
EX0182	Introduction to Clarity - Module 8: Portlets vs. Reports - .m4v	theBasiX™	Training Video	This video provides an overview of the difference between Clarity data displayed in portlets (within the browser) and Reports (external to the Clarity system). It touches upon benefits of each, and when you might prefer to utilize one over the other.
EX0182	Introduction to Clarity - Module 8: Portlets vs. Reports - .wmv	theBasiX™	Training Video	This video provides an overview of the difference between Clarity data displayed in portlets (within the browser) and Reports (external to the Clarity system). It touches upon benefits of each, and when you might prefer to utilize one over the other.
EX0183	Introduction to Clarity - Module 9: Running a Report - .m4v	theBasiX™	Training Video	This video provides an overview of how to run the out-of-the-box reports in Clarity. It touches on entering and saving Report Parameters, scheduling a report, report notifications and report sharing.
EX0183	Introduction to Clarity - Module 9: Running a Report - .wmv	theBasiX™	Training Video	This video provides an overview of how to run the out-of-the-box reports in Clarity. It touches on entering and saving Report Parameters, scheduling a report, report notifications and report sharing.
EX0218	Introduction to Clarity Time Entry - v12	theBasiX™	Training Documents	The Clarity Time Entry training document provides an overview of time entry within Clarity. This introductory level presentation is designed to provide new users with the information needed to add tasks to a timesheet, submit the timesheet, and make adjustments to the timesheet.
EX0218	Introduction to Clarity Time Entry - v13	theBasiX™	Training Documents	The Clarity Time Entry training document provides an overview of time entry within Clarity. This introductory level presentation is designed to provide new users with the information needed to add tasks to a timesheet, submit the timesheet, and make adjustments to the timesheet.
EX0203	Introduction to Portfolio Management V13	theBasiX™	Training Documents	The Introduction to Portfolio Management training document provides an overview of portfolio management. This introductory level presentation is designed to provide new users of portfolio management with a quick synopsis of the key factors in portfolio management.
EX0192	Introduction to Project Management	theBasiX™	Training Documents	The Introduction to Project Management training document provides an overview of project management. This introductory level presentation is designed to provide new project managers or users with a quick

	V13			synopsis of the key factors in project management.
EX0193	Introduction to Resource Management V13	theBasiX™	Training Documents	The Introduction to Resource Management training document provides an overview of resource management. This introductory level presentation is designed to provide new resource managers or users with a quick synopsis of the key factors in resource management.
EX0247	Invalid Transactions - Oracle	theWorX™	Portlet	The Invalid Transactions portlet displays all of the transactions that did/will not post in Clarity. The benefit of this portlet is that you can use the filter to select a specific project, resource, or error to display all transactions associated to your selection. There are several reasons a transaction may fail to post such as inactive resource, no location or inactive location selected on the Financial sub-page, project on hold, etc. To resolve the error, the user must go into the project or resource and make the noted change. Once all corrections are complete, the Post Transactions to Financials job must be run to evaluate the corrected WIP transactions to be sure the data is now complete and accurate. If additional incorrect data is found, the transaction will fail to post again and the new error/reason will display.
EX0247	Invalid Transactions - SQL Server	theWorX™	Portlet	The Invalid Transactions portlet displays all of the transactions that did/will not post in Clarity. The benefit of this portlet is that you can use the filter to select a specific project, resource, or error to display all transactions associated to your selection. There are several reasons a transaction may fail to post such as inactive resource, no location or inactive location selected on the Financial sub-page, project on hold, etc. To resolve the error, the user must go into the project or resource and make the noted change. Once all corrections are complete, the Post Transactions to Financials job must be run to evaluate the corrected WIP transactions to be sure the data is now complete and accurate. If additional incorrect data is found, the transaction will fail to post again and the new error/reason will display.
EX0061	Job Schedule Details - Oracle	theWorX™	Portlet	The Job Schedule Details portlet shows all active jobs and displays all of the schedule information for those jobs – including the months, days, hours, and minutes. It also displays the last time the job was updated and whether or not the job was custom or a CA job. The portlet will help the administrator understand the current job schedule configuration.
EX0061	Job Schedule Details - SQL Server	theWorX™	Portlet	The Job Schedule Details portlet shows all active jobs and displays all of the schedule information for those jobs – including the months, days, hours, and minutes. It also displays the last time the job was updated and whether or not the job was custom or a CA job. The portlet will help the administrator understand the current job schedule configuration.
EX0062	Last Logged In - Oracle	theWorX™	Portlet	The Last Logged In portlet provides the administrator with an overview of all users within the system and the last time he or she logged into Clarity. Using this portlet, administrators can quickly cleanup any inactive users or provide a list of users to managers that are not logging into the system. The portlet provides several pieces of information related to the resource as well as a “Days Since Last Login” with a

				status indicator. The administrator may filter on resource/id, OBS, user status, resource manager, or last logged in date to narrow down the results.
EX0062	Last Logged In - SQL Server	theWorX™	Portlet	The Last Logged In portlet provides the administrator with an overview of all users within the system and the last time he or she logged into Clarity. Using this portlet, administrators can quickly cleanup any inactive users or provide a list of users to managers that are not logging into the system. The portlet provides several pieces of information related to the resource as well as a “Days Since Last Login” with a status indicator. The administrator may filter on resource/id, OBS, user status, resource manager, or last logged in date to narrow down the results.
EX0063	Late Issues - Oracle	theWorX™	Portlet	The Late Issues portlet displays all issues related to active projects that the logged in user has view rights to. The issues displayed are those that are past their target resolution date but not Closed or Resolved. The portlet provides a Project Manager the ability to view and track issues across multiple projects without going into each project individually. This portlet displays the issue, the associated project name and project manager, as well as the issue owner, target resolution date, status, and priority of the issue, along with the total number of days the issue has been open. The user has the ability to filter by several criteria in order to narrow down the late issues.
EX0063	Late Issues - SQL Server	theWorX™	Portlet	The Late Issues portlet displays all issues related to active projects that the logged in user has view rights to. The issues displayed are those that are past their target resolution date but not Closed or Resolved. The portlet provides a Project Manager the ability to view and track issues across multiple projects without going into each project individually. This portlet displays the issue, the associated project name and project manager, as well as the issue owner, target resolution date, status, and priority of the issue, along with the total number of days the issue has been open. The user has the ability to filter by several criteria in order to narrow down the late issues.
EX0064	Late Milestones - Oracle	theWorX™	Portlet	The Late Milestones portlet displays all action items related to active projects that the logged in user has view rights to. The milestones displayed are those that are not closed but are past their finish date or past their baseline finish date. The portlet provides a Project Manager the ability to view and track action items across multiple projects without going into each project individually. This portlet provides a single consolidated view of late milestones based on the current project baseline, and the age of the milestone. The portlet will display the Project ID, Project Name, Project Manager, Milestone Name, Due Date, Baseline Date, Days Late (calculated from baseline dates), and Days Old (calculated from today’s date).
EX0064	Late Milestones - SQL Server	theWorX™	Portlet	The Late Milestones portlet displays all action items related to active projects that the logged in user has view rights to. The milestones displayed are those that are not closed but are past their finish date or past their baseline finish date. The portlet provides a Project Manager the ability to view and track action items across multiple projects without going into each project individually. This portlet provides a single

				consolidated view of late milestones based on the current project baseline, and the age of the milestone. The portlet will display the Project ID, Project Name, Project Manager, Milestone Name, Due Date, Baseline Date, Days Late (calculated from baseline dates), and Days Old (calculated from today's date).
EX0065	Late Project Action Items - Oracle	theWorX™	Portlet	The Late Project Action Items portlet displays all action items related to active projects that the logged in user has view rights to. The action items displayed are those that are past their due date with a status of "In Progress" or "Open". The portlet provides a Project Manager the ability to view and track action items across multiple projects without going into each project individually. In a single consolidated list, all late project action items can be easily viewed, along with the project with which they are associated, the individual assigned, and the owner of the action item.
EX0065	Late Project Action Items - SQL Server	theWorX™	Portlet	The Late Project Action Items portlet displays all action items related to active projects that the logged in user has view rights to. The action items displayed are those that are past their due date with a status of "In Progress" or "Open". The portlet provides a Project Manager the ability to view and track action items across multiple projects without going into each project individually. In a single consolidated list, all late project action items can be easily viewed, along with the project with which they are associated, the individual assigned, and the owner of the action item.
EX0066	Late Risks - Oracle	theWorX™	Portlet	The Late Risks portlet displays all risks related to active projects that the logged in user has view rights to. The risks displayed are those that are past their target resolution date but not Closed or Resolved. The portlet provides a Project Manager the ability to view and track Risks across multiple projects without going into each project individually. This portlet displays the risk, the associated project name and project manager, as well as the risk owner, target resolution date, status, priority of the risk, and the total number of days the risk has been open.
EX0066	Late Risks - SQL Server	theWorX™	Portlet	The Late Risks portlet displays all risks related to active projects that the logged in user has view rights to. The risks displayed are those that are past their target resolution date but not Closed or Resolved. The portlet provides a Project Manager the ability to view and track Risks across multiple projects without going into each project individually. This portlet displays the risk, the associated project name and project manager, as well as the risk owner, target resolution date, status, priority of the risk, and the total number of days the risk has been open.
EX0067	Late Tasks - Oracle	theWorX™	Portlet	The Late Tasks portlet provides a Project Manager the ability to view and track tasks across multiple projects with due dates in the past. This portlet provides a single consolidated view of late tasks, their task start and finish date, and ETCs remaining for the task. Also displayed is the number of days that the Task Finish Date is different from the current baseline finish date (Days Late) as well as the number of days that have passed beyond the task finish date and the current date (Days Old). The user will see all tasks associated with the projects to which they have access.

EX0067	Late Tasks - SQL Server	theWorX™	Portlet	The Late Tasks portlet provides a Project Manager the ability to view and track tasks across multiple projects with due dates in the past. This portlet provides a single consolidated view of late tasks, their task start and finish date, and ETCs remaining for the task. Also displayed is the number of days that the Task Finish Date is different from the current baseline finish date (Days Late) as well as the number of days that have passed beyond the task finish date and the current date (Days Old). The user will see all tasks associated with the projects to which they have access.
EX0145	License Counts by OBS - Oracle	theWorX™	Portlet	The License Count by OBS portlet displays license type information by a selected OBS for active users. The portlet is used to determine what kind of license a specific user has and the OBS in which he or she resides. It can be helpful for determining specific amount of licenses used by different departments within the organization.
EX0145	License Counts by OBS - SQL Server	theWorX™	Portlet	The License Count by OBS portlet displays license type information by a selected OBS for active users. The portlet is used to determine what kind of license a specific user has and the OBS in which he or she resides. It can be helpful for determining specific amount of licenses used by different departments within the organization.
EX0068	Locked Projects - Oracle	theBasiX™	Portlet	The Locked Projects portlet displays all of the projects in the system that are currently in a 'locked' state. The user may view the project ID, Project Name, Project Manager, the user who locked the project, the user's email address, and the date the project was locked. Administrators may utilize the data in this portlet in order to determine if a manual unlock should be executed on a project that has been locked for an extended period of time. Extended locks may indicate the individual has forgotten that he or she had obtained the lock. The portlet includes a hyperlink on the Project Name field, which will allow the administrator to more easily access and unlock the project as well as an email link to mail the user who locked the project.
EX0068	Locked Projects - SQL Server	theBasiX™	Portlet	The Locked Projects portlet displays all of the projects in the system that are currently in a 'locked' state. The user may view the project ID, Project Name, Project Manager, the user who locked the project, the user's email address, and the date the project was locked. Administrators may utilize the data in this portlet in order to determine if a manual unlock should be executed on a project that has been locked for an extended period of time. Extended locks may indicate the individual has forgotten that he or she had obtained the lock. The portlet includes a hyperlink on the Project Name field, which will allow the administrator to more easily access and unlock the project as well as an email link to mail the user who locked the project.
EX0069	Locked Resources - Oracle	theWorX™	Portlet	The Locked Resources portlet displays all resources that are locked within Clarity. It also displays the resource manager and last updated date for the user. The portlet can be filtered on resource manager and last updated date range. This portlet can be used by an administrator to determine which resources are

				locked by the system.
EX0069	Locked Resources - SQL Server	theWorX™	Portlet	The Locked Resources portlet displays all resources that are locked within Clarity. It also displays the resource manager and last updated date for the user. The portlet can be filtered on resource manager and last updated date range. This portlet can be used by an administrator to determine which resources are locked by the system.
EX0070	Manage Risk Categories - Oracle	theWorX™	Technical Trick	The Manage Risk Categories document provides the steps needed to modify the current system-defined list of values for the Risk categories.
EX0070	Manage Risk Categories - SQL Server	theWorX™	Technical Trick	The Manage Risk Categories document provides the steps needed to modify the current system-defined list of values for the Risk categories
EX0600	Microsoft Project - Open Workbench Comparison	theBasiX™	Presentation (Information)	A PowerPoint presentation reviewing the differences between using MSP and OWB as an external scheduling tool. Benefits and drawbacks of each tool are addressed, along with criteria for making a decision on which to go with.
EX0594	Microsoft Project Errors and Issues	theWorX™	Training Documents	A document detailing some common MSP Errors and Issues, and suggestions for how to address them.
EX0071	Missing Time by OBS - Oracle	theBasiX™	Portlet	The Missing Time by OBS portlet displays all missing or late timesheets for resources staffed within a certain OBS. Resources will be listed if they are open for time entry, have a track mode of Clarity, and have timesheet that is not posted (accommodates for hire and termination dates). The portlet also only shows resources that the logged in user has security rights to view. Administrators and the Project Management Office may use this portlet to determine the timesheet status of all resources in open time periods within a specific OBS. Many times a user will need to see all the timesheets under an area. This portlet allows a user to quickly search by OBS and view all timesheets under that OBS. After you select the OBS, you may select the period start in the filter. The portlet will display an indicator based on timesheet status, the status, period start, resource name, resource manager, and actual hours for the timesheet.
EX0071	Missing Time by OBS - SQL Server	theBasiX™	Portlet	The Missing Time by OBS portlet displays all missing or late timesheets for resources staffed within a certain OBS. Resources will be listed if they are open for time entry, have a track mode of Clarity, and have timesheet that is not posted (accommodates for hire and termination dates). The portlet also only shows resources that the logged in user has security rights to view. Administrators and the Project Management Office may use this portlet to determine the timesheet status of all resources in open time periods within a specific OBS. Many times a user will need to see all the timesheets under an area. This portlet allows a user to quickly search by OBS and view all timesheets under that OBS. After you select

				the OBS, you may select the period start in the filter. The portlet will display an indicator based on timesheet status, the status, period start, resource name, resource manager, and actual hours for the timesheet.
EX0146	Missing Time by PM - Oracle	theBasiX™	Portlet	The Missing Time by PM portlet displays all missing or late timesheets for resources staffed on a project where the logged in user is the project manager. Resources will be listed if they are open for time entry, have a track mode of Clarity, and have timesheet that is not posted (accommodates for hire and termination dates). Project managers may use this portlet to determine the timesheet status of resources staffed on their projects. You may narrow the results by filtering by resource manager, period start, resource name, or status. The portlet will display an indicator based on timesheet status, the status, period start, resource name, and actual hours for the timesheet.
EX0146	Missing Time by PM - SQL Server	theBasiX™	Portlet	The Missing Time by PM portlet displays all missing or late timesheets for resources staffed on a project where the logged in user is the project manager. Resources will be listed if they are open for time entry, have a track mode of Clarity, and have timesheet that is not posted (accommodates for hire and termination dates). Project managers may use this portlet to determine the timesheet status of resources staffed on their projects. You may narrow the results by filtering by resource manager, period start, resource name, or status. The portlet will display an indicator based on timesheet status, the status, period start, resource name, and actual hours for the timesheet.
EX0147	Missing Time by RM - Oracle	theBasiX™	Portlet	The Missing Time by RM portlet displays all missing or late timesheets for resources for which the logged in user has resources (logged in user is the RM). Resources will be listed if they are open for time entry, have a track mode of Clarity, and have timesheet that is not posted (accommodates for hire and termination dates). Resource managers may use this portlet to determine the timesheet status of all resources in open time periods. The portlet will display an indicator based on timesheet status, the status, period start, resource name, and actual hours for the timesheet.
EX0147	Missing Time by RM - SQL Server	theBasiX™	Portlet	The Missing Time by RM portlet displays all missing or late timesheets for resources for which the logged in user has resources (logged in user is the RM). Resources will be listed if they are open for time entry, have a track mode of Clarity, and have timesheet that is not posted (accommodates for hire and termination dates). Resource managers may use this portlet to determine the timesheet status of all resources in open time periods. The portlet will display an indicator based on timesheet status, the status, period start, resource name, and actual hours for the timesheet.
EX0148	Move Role to Team/Assignment - Oracle	theWorX™	Workflow Job	The Move Role to Team/Assignment process takes the role from the resource object and pushes that information into the team and assignment objects when the role isn't NULL on the team and assignment objects. This happens normally, assuming a resource has their primary role populated. This process is needed if a resource or set of resources were added to projects without having their primary role filled in.

EX0148	Move Role to Team/Assignment - SQL Server	theWorX™	Workflow Job	The Move Role to Team/Assignment process takes the role from the resource object and pushes that information into the team and assignment objects when the role isn't NULL on the team and assignment objects. This happens normally, assuming a resource has their primary role populated. This process is needed if a resource or set of resources were added to projects without having their primary role filled in.
EX0072	Multi-Value Filter in Query-Based Portlet - Oracle	theBasiX™	Technical Trick	The Multi-Value Filter in Query-Based technical trick document provides an overview of how to create a multi-value lookup in a portlet filter, where the field is a parameter within the query. If the query imbeds the parameter normally, the portlet will only be able to have a single selection of that parameter. This technical solution will enable you to make these parameters multi-selects.
EX0072	Multi-Value Filter in Query-Based Portlet - SQL Server	theBasiX™	Technical Trick	The Multi-Value Filter in Query-Based technical trick document provides an overview of how to create a multi-value lookup in a portlet filter, where the field is a parameter within the query. If the query imbeds the parameter normally, the portlet will only be able to have a single selection of that parameter. This technical solution will enable you to make these parameters multi-selects.
EX0149	My Action Items - Oracle	theBasiX™	Portlet	The My Action Items portlet displays all action items that are assigned or created by the logged in user. This portlet contains action item data including due date and a health stoplight to indicate when action items are late.
EX0149	My Action Items - SQL Server	theBasiX™	Portlet	The My Action Items portlet displays all action items that are assigned or created by the logged in user. This portlet contains action item data including due date and a health stoplight to indicate when action items are late.
EX0073	My Allocations - Oracle	theWorX™	Portlet	The My Allocations portlet will display the allocations for the logged in user - pulling data from the timeslices. It is used as a quick reference for the users to view their allocations across all of the projects where their allocation is greater than 0 for the specified date range the user wants. This will display both active and inactive projects.
EX0073	My Allocations - SQL Server	theWorX™	Portlet	The My Allocations portlet will display the allocations for the logged in user - pulling data from the timeslices. It is used as a quick reference for the users to view their allocations across all of the projects where their allocation is greater than 0 for the specified date range the user wants. This will display both active and inactive projects.
EX0074	My Assignments - Oracle	theWorX™	Portlet	The My Assignments portlet will display the allocations for the logged in user - pulling data from the timeslices. It is used as a quick reference for the users to view their allocations across all of the projects. The portlet also displays work posted against the task, expressed in Actuals, and remaining work to be done, expressed as an Estimate to Complete (ETC). The Effort Variance reflects what the ETC variance is compared to the last current baseline of the project.

EX0074	My Assignments - SQL Server	theWorX™	Portlet	The My Assignments portlet will display the allocations for the logged in user - pulling data from the timeslices. It is used as a quick reference for the users to view their allocations across all of the projects. The portlet also displays work posted against the task, expressed in Actuals, and remaining work to be done, expressed as an Estimate to Complete (ETC). The Effort Variance reflects what the ETC variance is compared to the last current baseline of the project.
EX0253	My Documents on Projects - Oracle	theWorX™	Portlet	The My Documents on Projects portlet displays all of the documents the user has uploaded to projects. This portlet provides the user a single place to view documents across multiple projects without having to go into each project individually. This is efficient and time saving for the user. The filter allows the user to narrow their search by Project, File Name, Active Projects and Description. You may also narrow the view to display documents with a created date within a certain date range. Note: In v13, clicking the file name will link to the collaboration tab where the document resides.
EX0253	My Documents on Projects - SQL Server	theWorX™	Portlet	The My Documents on Projects portlet displays all of the documents the user has uploaded to projects. This portlet provides the user a single place to view documents across multiple projects without having to go into each project individually. This is efficient and time saving for the user. The filter allows the user to narrow their search by Project, File Name, Active Projects and Description. You may also narrow the view to display documents with a created date within a certain date range. Note: In v13, clicking the file name will link to the collaboration tab where the document resides.
EX0075	My Issues - Oracle	theBasiX™	Portlet	The My Issues portlet displays all issues within active project that the logged in user is assigned to. The portlet provides the logged in user a single place to view issues across multiple projects without having to go into each project individually. The filter then allows the user to narrow their search by Issue ID, Issue Name, Project ID, Project Name, and Issue Status. You may also narrow the view to display issues with a target resolution date within a certain date range.
EX0075	My Issues - SQL Server	theBasiX™	Portlet	The My Issues portlet displays all issues within active project that the logged in user is assigned to. The portlet provides the logged in user a single place to view issues across multiple projects without having to go into each project individually. The filter then allows the user to narrow their search by Issue ID, Issue Name, Project ID, Project Name, and Issue Status. You may also narrow the view to display issues with a target resolution date within a certain date range.
EX0076	My Missing Time - Oracle	theBasiX™	Portlet	The My Missing Time portlet displays all open time periods for which the logged in user (assuming they are open for time entry with a track mode of Clarity) has a timesheet that is not posted (accommodates for hire and termination dates). The portlet is used as a quick reference for users to view their missing time.
EX0076	My Missing Time - SQL Server	theBasiX™	Portlet	The My Missing Time portlet displays all open time periods for which the logged in user (assuming they are open for time entry with a track mode of Clarity) has a timesheet that is not posted (accommodates for

				hire and termination dates). The portlet is used as a quick reference for users to view their missing time.
EX0248	My Resource Count by Project - Oracle	theWorX™	Portlet	The My Resource Count by Project portlet displays project information, total team count and the current user's resource count assigned to the each project. The user may narrow the results by filtering on project name, manager, status, team count, managed resource count or percentage managed resource count. Using this portlet, resource managers are able to quickly identify which projects their resources are allocated to without having to navigate to each resource individually. Not only does this portlet display the overall team count on the project (team count), but it also displays the managed resource count (logged in user's amount of resources allocated to the project) as well as the percentage of managed resource count to team count.
EX0248	My Resource Count By Project - SQL Server	theWorX™	Portlet	The My Resource Count by Project portlet displays project information, total team count and the current user's resource count assigned to the each project. The user may narrow the results by filtering on project name, manager, status, team count, managed resource count or percentage managed resource count. Using this portlet, resource managers are able to quickly identify which projects their resources are allocated to without having to navigate to each resource individually. Not only does this portlet display the overall team count on the project (team count), but it also displays the managed resource count (logged in user's amount of resources allocated to the project) as well as the percentage of managed resource count to team count.
EX0259	My Resource Vacation - Oracle	theWorX™	Portlet	The My Resource Vacation portlet allows a resource to view the current logged in users' annual vacation allowance, as set by the resource manager, against the resource vacation calendar hours and actual posted timesheet hours. The portlet is useful for determining the amount of hours a resource has requested off and has remaining. The portlet also ensures the resource has accounted for all annual vacation allowance hours in the calendar and has posted time for all past calendar request hours.
EX0259	My Resource Vacation - SQL Server	theWorX™	Portlet	The My Resource Vacation portlet allows a resource to view the current logged in users' annual vacation allowance, as set by the resource manager, against the resource vacation calendar hours and actual posted timesheet hours. The portlet is useful for determining the amount of hours a resource has requested off and has remaining. The portlet also ensures the resource has accounted for all annual vacation allowance hours in the calendar and has posted time for all past calendar request hours.
EX0078	My Resource Vacation Details - Oracle	theWorX™	Portlet	The My Resource Vacation Details portlet returns the logged in users calendar at a glance by week or month for a selected time period. It shows the Resource Name, Resource Manager, Calendar, H (holiday), and V (vacation) hours for the select time frame.
EX0078	My Resource Vacation Details -	theWorX™	Portlet	The My Resource Vacation Details portlet returns the logged in users calendar at a glance by week or month for a selected time period. It shows the Resource Name, Resource Manager, Calendar, H (holiday),

	SQL Server			and V (vacation) hours for the select time frame.
EX0079	My Resources' Time by Quarter and Type - Oracle	theWorX™	Portlet	The My Resources' Time by Quarter and Type portlet displays all subordinate resources' time by type for each quarter. The portlet is able to display either actuals or estimates for each resource. This portlet allows the resource manager to see how each of his or her resources' time is utilized by project type. The user may filter on a specific date range (quarter) and resource OBS.
EX0079	My Resources' Time by Quarter and Type - SQL Server	theWorX™	Portlet	The My Resources' Time by Quarter and Type portlet displays all subordinate resources' time by type for each quarter. The portlet is able to display either actuals or estimates for each resource. This portlet allows the resource manager to see how each of his or her resources' time is utilized by project type. The user may filter on a specific date range (quarter) and resource OBS.
EX0080	My Risks - Oracle	theBasiX™	Portlet	The My Risks portlet displays all risks related to active projects that the logged in user has been assigned as the owner. The portlet provides the logged in user a single place to view risks across multiple projects without having to go into each project individually. The filter then allows the user to narrow their search by Risk ID, Risk Name, Project ID, Project Name, and Risk Status. You may also narrow the view to display issues with a target resolution date or impact date within a certain date range.
EX0080	My Risks - SQL Server	theBasiX™	Portlet	The My Risks portlet displays all risks related to active projects that the logged in user has been assigned as the owner. The portlet provides the logged in user a single place to view risks across multiple projects without having to go into each project individually. The filter then allows the user to narrow their search by Risk ID, Risk Name, Project ID, Project Name, and Risk Status. You may also narrow the view to display issues with a target resolution date or impact date within a certain date range.
EX0081	My Time - Oracle	theBasiX™	Portlet	The My Time portlet provides the logged in user with the ability to view his or her time by project by time period without having to go into each period individually on the Timesheets page. This portlet uses the actual timeslices to retrieve data. It displays the amount of time worked per week, month or quarter on projects. The user may specify the dates, time-scaled value and the project name.
EX0081	My Time - SQL Server	theBasiX™	Portlet	The My Time portlet provides the logged in user with the ability to view his or her time by project by time period without having to go into each period individually on the Timesheets page. This portlet uses the actual timeslices to retrieve data. It displays the amount of time worked per week, month or quarter on projects. The user may specify the dates, time-scaled value and the project name.
EX0082	Open and Close Periods - Oracle	theBasiX™	Workflow Job	The Open and Close Periods process closes the earliest open time period and opens the first closed time period after the latest open time period. This process may be used for a non-administrator to open and close time periods without having access to the administrative side. The process is executed through the job Execute Process. For example, our oldest time period is January 6, and our most recent is May 1, it would close out January 6, and open a time period for the week after May 1.

EX0082	Open and Close Periods - SQL Server	theBasiX™	Workflow Job	The Open and Close Periods process closes the earliest open time period and opens the first closed time period after the latest open time period. This process may be used for a non-administrator to open and close time periods without having access to the administrative side. The process is executed through the job Execute Process. For example, our oldest time period is January 6, and our most recent is May 1, it would close out January 6, and open a time period for the week after May 1.
EX0185	Open WorkBench Basics - Module 1: Using Views V12 - m4v	theWorX™	Training Video	This video provides an overview of utilizing the various views available within Open WorkBench.
EX0185	Open WorkBench Basics - Module 1: Using Views V12 - wmv	theWorX™	Training Video	This video provides an overview of utilizing the various views available within Open WorkBench.
EX0185	Open WorkBench Basics - Module 1: Using Views V13 - m4v	theWorX™	Training Video	This video provides an overview of utilizing the various views available within Open WorkBench.
EX0185	Open WorkBench Basics - Module 1: Using Views V13 - wmv	theWorX™	Training Video	This video provides an overview of utilizing the various views available within Open WorkBench.
EX0186	Open WorkBench Basics - Module 2: Updating the WBS V12 - m4v	theWorX™	Training Video	This video describes the process of creating new tasks and working with the Work Breakdown Structure (WBS) within Open WorkBench.
EX0186	Open WorkBench Basics - Module 2: Updating the WBS V12 - wmv	theWorX™	Training Video	This video describes the process of creating new tasks and working with the Work Breakdown Structure (WBS) within Open WorkBench.
EX0186	Open WorkBench Basics - Module 2:	theWorX™	Training Video	This video describes the process of creating new tasks and working with the Work Breakdown Structure (WBS) within Open WorkBench.

	Updating the WBS V13 - m4v			
EX0186	Open WorkBench Basics - Module 2: Updating the WBS V13 - wmv	theWorX™	Training Video	This video describes the process of creating new tasks and working with the Work Breakdown Structure (WBS) within Open WorkBench.
EX0187	Open WorkBench Basics - Module 3: Using Dependencies V12 - m4v	theWorX™	Training Video	This video describes how to create and work with task dependencies within Open WorkBench.
EX0187	Open WorkBench Basics - Module 3: Using Dependencies V12 - wmv	theWorX™	Training Video	This video describes how to create and work with task dependencies within Open WorkBench.
EX0187	Open WorkBench Basics - Module 3: Using Dependencies V13 - m4v	theWorX™	Training Video	This video describes how to create and work with task dependencies within Open WorkBench.
EX0187	Open WorkBench Basics - Module 3: Using Dependencies V13 - wmv	theWorX™	Training Video	This video describes how to create and work with task dependencies within Open WorkBench.
EX0188	Open WorkBench Basics - Module 4: Assigning Resources V12 - m4v	theWorX™	Training Video	This video describes the process to assign resources to tasks within OWB.
EX0188	Open WorkBench Basics - Module 4: Assigning Resources V12 - wmv	theWorX™	Training Video	This video describes the process to assign resources to tasks within OWB.

EX0188	Open WorkBench Basics - Module 4: Assigning Resources V13 - m4v	theWorX™	Training Video	This video describes the process to assign resources to tasks within OWB.
EX0188	Open WorkBench Basics - Module 4: Assigning Resources V13 - wmv	theWorX™	Training Video	This video describes the process to assign resources to tasks within OWB.
EX0189	Open WorkBench Basics - Module 5: Transfer Assignments Wizard V12 - m4v	theWorX™	Training Video	Using the Transfer Assignments Wizard within OWB.
EX0189	Open WorkBench Basics - Module 5: Transfer Assignments Wizard V12 - wmv	theWorX™	Training Video	This video describes the process of transferring assignments from one resource to another resource of the same type (e.g., labor to labor, equipment to equipment) using the Transfer Assignments Wizard in OWB.
EX0189	Open WorkBench Basics - Module 5: Transfer Assignments Wizard V13 - m4v	theWorX™	Training Video	This video describes the process of transferring assignments from one resource to another resource of the same type (e.g., labor to labor, equipment to equipment) using the Transfer Assignments Wizard in OWB.
EX0189	Open WorkBench Basics - Module 5: Transfer Assignments Wizard V13 - wmv	theWorX™	Training Video	This video describes the process of transferring assignments from one resource to another resource of the same type (e.g., labor to labor, equipment to equipment) using the Transfer Assignments Wizard in OWB.
EX0194	Open WorkBench Basics - Module 6:	theWorX™	Training Video	This video describes the process either a Start or Finish date on a project in OWB. The date (start or finish) will determine the point from which all tasks in the project are then scheduled.

	Imposing Start & Finish Dates V12 - m4v			
EX0194	Open WorkBench Basics - Module 6: Imposing Start & Finish Dates V12 - wmv	theWorX™	Training Video	This video describes the process either a Start or Finish date on a project in OWB. The date (start or finish) will determine the point from which all tasks in the project are then scheduled.
EX0194	Open WorkBench Basics - Module 6: Imposing Start & Finish Dates V13 - m4v	theWorX™	Training Video	This video describes the process either a Start or Finish date on a project in OWB. The date (start or finish) will determine the point from which all tasks in the project are then scheduled.
EX0194	Open WorkBench Basics - Module 6: Imposing Start & Finish Dates V13 - wmv	theWorX™	Training Video	This video describes the process either a Start or Finish date on a project in OWB. The date (start or finish) will determine the point from which all tasks in the project are then scheduled.
EX0195	Open WorkBench Basics - Module 7: Autoschedule V12 - m4v	theWorX™	Training Video	This video describes the process to Autoschedule a project using OWB.
EX0195	Open WorkBench Basics - Module 7: Autoschedule V12 - wmv	theWorX™	Training Video	This video describes the process to Autoschedule a project using OWB.
EX0195	Open WorkBench Basics - Module 7: Autoschedule V13 - m4v	theWorX™	Training Video	This video describes the process to Autoschedule a project using OWB.
EX0195	Open WorkBench Basics - Module 7:	theWorX™	Training Video	This video describes the process to Autoschedule a project using OWB.

	Autoschedule V13 - wmv			
EX0196	Open WorkBench Basics - Module 8: Baseline V12 - m4v	theWorX™	Training Video	This video describes the process to baseline a project using OWB.
EX0196	Open WorkBench Basics - Module 8: Baseline V12 - wmv	theWorX™	Training Video	This video describes the process to baseline a project using OWB.
EX0196	Open WorkBench Basics - Module 8: Baseline V13 - m4v	theWorX™	Training Video	This video describes the process to baseline a project using OWB.
EX0196	Open WorkBench Basics - Module 8: Baseline V13 - wmv	theWorX™	Training Video	This video describes the process to baseline a project using OWB.
EX0197	Open WorkBench Basics - Module 9: Pending Actuals & ETCs V12 - m4v	theWorX™	Training Video	This video describes the process review and approve/reject Pending Actuals and ETCs within OWB.
EX0197	Open WorkBench Basics - Module 9: Pending Actuals & ETCs V12 - wmv	theWorX™	Training Video	This video describes the process review and approve/reject Pending Actuals and ETCs within OWB.
EX0197	Open WorkBench Basics - Module 9: Pending Actuals & ETCs V13 - m4v	theWorX™	Training Video	This video describes the process review and approve/reject Pending Actuals and ETCs within OWB.
EX0197	Open WorkBench	theWorX™	Training	This video describes the process review and approve/reject Pending Actuals and ETCs within OWB.

	Basics - Module 9: Pending Actuals & ETCs V13 - wmv		Video	
EX0084	PM Stalker – Submit Status Report - Oracle	theWorX™	Workflow Job	The PM Stalker – Submit Status Report workflow process will email any project manager that has not submitted a status report in the last two weeks. This process will ensure that all status reports are kept up-to-date and provide management with a reliable overview of the status on the project.
EX0084	PM Stalker – Submit Status Report - SQL Server	theWorX™	Workflow Job	The PM Stalker – Submit Status Report workflow process will email any project manager that has not submitted a status report in the last two weeks. This process will ensure that all status reports are kept up-to-date and provide management with a reliable overview of the status on the project.
EX0085	Portlets and NSQL Queries - Oracle	theWorX™	Portlet	The Portlets and NSQL Queries portlet displays portlets built from queries. The portlet provides the administrator with the ability to search queries developed in the past that may have a certain attribute within it. This is helpful during upgrades when CA makes data model changes.
EX0085	Portlets and NSQL Queries - SQL Server	theWorX™	Portlet	The Portlets and NSQL Queries portlet displays portlets built from queries. The portlet provides the administrator with the ability to search queries developed in the past that may have a certain attribute within it. This is helpful during upgrades when CA makes data model changes.
EX0086	Portlets on Pages - Oracle	theWorX™	Portlet	Portlets on Pages displays portlets located on each page within Clarity. This portlet is useful for administrators to determine which users have customized their pages and if they are not seeing a certain portlet, or if a user has placed a portlet on another page and needs help locating it. It also shows the portlet code, name, page the portlet resides on, tab type, who created the tab, source type, and the object/query.
EX0086	Portlets on Pages - SQL Server	theWorX™	Portlet	Portlets on Pages displays portlets located on each page within Clarity. This portlet is useful for administrators to determine which users have customized their pages and if they are not seeing a certain portlet, or if a user has placed a portlet on another page and needs help locating it. It also shows the portlet code, name, page the portlet resides on, tab type, who created the tab, source type, and the object/query.
EX0235	Post to WIP Automation - Oracle	theWorX™	Workflow Job	The Post to WIP add-on application allows for the clarity administrator to automate the post to WIP process. The post to WIP process is one of several steps in the financials process; however, it is the one that is not automated out-of-the-box. Using this add-on, administrators are able to run the post to WIP job as a regularly scheduled job, eliminating the need to run it manually.
EX0235	Post to WIP Automation - SQL	theWorX™	Workflow Job	The Post to WIP add-on application allows for the clarity administrator to automate the post to WIP process. The post to WIP process is one of several steps in the financials process; however, it is the one

	Server			that is not automated out-of-the-box. Using this add-on, administrators are able to run the post to WIP job as a regularly scheduled job, eliminating the need to run it manually.
EX0087	Process Instance Errors - Oracle	theWorX™	Portlet	The Process Instance Errors portlet will show all processes that error. This portlet will assist the administrator with determining which processes are in error and whether to skip, retry, or cancel. It will display the process name, code, start date, and who initiated the process. You may also filter by any of the criteria listed in the grid.
EX0087	Process Instance Errors - SQL Server	theWorX™	Portlet	The Process Instance Errors portlet will show all processes that error. This portlet will assist the administrator with determining which processes are in error and whether to skip, retry, or cancel. It will display the process name, code, start date, and who initiated the process. You may also filter by any of the criteria listed in the grid.
EX0175	Product Cost by Goal - Oracle	theWorX™	Portlet	The Product Cost by Goal portlet displays the planned cost of all active products within a timeframe, summarized by goal in a pie chart. This portlet provides management with a quick overview of cost by goal within a year without navigating to each product individually.
EX0175	Product Cost by Goal - SQL Server	theWorX™	Portlet	The Product Cost by Goal portlet displays the planned cost of all active products within a timeframe, summarized by goal in a pie chart. This portlet provides management with a quick overview of cost by goal within a year without navigating to each product individually.
EX0174	Product Costs by Year - Oracle	theWorX™	Portlet	The Product Cost by Year portlet displays active product cost by year, summarized by goal. The product cost is pulled from the product's planned cost and is displayed by year, with colors representing each product goal. This portlet provides management with a quick overview of all product costs without having to navigate to each product individually.
EX0174	Product Costs by Year - SQL Server	theWorX™	Portlet	The Product Cost by Year portlet displays active product cost by year, summarized by goal. The product cost is pulled from the product's planned cost and is displayed by year, with colors representing each product goal. This portlet provides management with a quick overview of all product costs without having to navigate to each product individually.
EX0230	Product Risk by Goal - Oracle	theWorX™	Portlet	The Product Risk by Goal portlet displays a count of active products by goal with a sub-count by risk. The graph is color-coded by risk rating: • 1-33 – Green • 34-66 – Yellow • 67-100 – Red The portlet provides a quick overview of the risk rating for each product within each goal.
EX0230	Product Risk by Goal - SQL Server	theWorX™	Portlet	The Product Risk by Goal portlet displays a count of active products by goal with a sub-count by risk. The graph is color-coded by risk rating: • 1-33 – Green • 34-66 – Yellow • 67-100 – Red The portlet provides a quick overview of the risk rating for each product within each goal.

EX0088	Program Executive Dashboard - Oracle	theWorX™	Portlet	The Program Executive Dashboard portlet displays information regarding sub-projects on a program. It provides a one-stop place for the PMO or management to view all critical information about projects under a specific program. The portlet displays status indicators, dates for late items, variances and days over base, it also displays the project status fields from the Status Report subobject.
EX0088	Program Executive Dashboard - SQL Server	theWorX™	Portlet	The Program Executive Dashboard portlet displays information regarding sub-projects on a program. It provides a one-stop place for the PMO or management to view all critical information about projects under a specific program. The portlet displays status indicators, dates for late items, variances and days over base, it also displays the project status fields from the Status Report subobject.
EX0089	Project Attachments - Oracle	theWorX™	Portlet	The Project Attachments portlet displays all attachments located on every project, regardless of security rights. This portlet is useful for not only the PM, but also the PMO to determine if a document has been uploaded for the toll gating process. It will also display the folder type, folder path, folder name, and file name. You have the ability to filter by project name, code, file name or file name.
EX0089	Project Attachments - SQL Server	theWorX™	Portlet	The Project Attachments portlet displays all attachments located on every project, regardless of security rights. This portlet is useful for not only the PM, but also the PMO to determine if a document has been uploaded for the toll gating process. It will also display the folder type, folder path, folder name, and file name. You have the ability to filter by project name, code, file name or file name.
EX0090	Project Close Process - Oracle	theWorX™	Workflow Job	The Project Close Process workflow process aides the Project Manager in some routine close out tasks that accompany every project. Marking the project inactive starts the process and it will continue down one of two paths: 1. Once the project is inactive, the process will then check to see if there is no remaining estimate to complete (ETC) still on the project. If there is ETC leftover, then the process will go into a waiting state for 14 days to allow the project manager to cleanup or to cancel the process if it was done in error. After 14 days, the process will check to see if the project is active again. If the project is active, then the process will end. However, if the project is still inactive, the process will continue with the closeout activities. 2. If the project is marked inactive and has no ETCs, then the process will immediately move to the closeout activities. The closeout activities include: <ul style="list-style-type: none"> • Turning off time entry for the project, tasks and project members • Updates the ETC, proposed ETC, and pending estimates to 0 • Updates the task status and assignment status to Completed • Sets the task, assignment and project finish dates to today's date only if the finish dates are after the process run date • Sets all Risks and Issues to Closed with a resolution of "## This was closed automatically as part of the project close process ##" Set future hard allocation and allocation finish dates to today when the date is after today's date
EX0090	Project Close Process - SQL Server	theWorX™	Workflow Job	The Project Close Process work flow process aides the Project Manager in some routine close out tasks that accompany every project. Marking the project inactive starts the process and it will continue down one of two paths: 1. Once the project is inactive, the process will then check to see if there is no remaining

				<p>estimate to complete (ETC) still on the project. If there is ETC leftover, then the process will go into a waiting state for 14 days to allow the project manager to cleanup or to cancel the process if it was done in error. After 14 days, the process will check to see if the project is active again. If the project is active, then the process will end. However, if the project is still inactive, the process will continue with the closeout activities. 2. If the project is marked inactive and has no ETCs, then the process will immediately move to the closeout activities. The closeout activities include: • Turning off time entry for the project, tasks and project members • Updates the ETC, proposed ETC, and pending estimates to 0 • Updates the task status and assignment status to Completed • Sets the task, assignment and project finish dates to today's date only if the finish dates are after the process run date • Sets all Risks and Issues to Closed with a resolution of "## This was closed automatically as part of the project close process ##" • Set future hard allocation and allocation finish dates to today when the date is after today's date</p>
EX0093	Project Cost Plan Variance - Oracle	theWorX™	Portlet	<p>The Project Cost Plan Variance portlet displays the variance between the budget and cost plans for projects the logged in user has security rights to view. The total for the Cost Plan that is marked as the Plan of Record for the project (Current Cost Plan Total), alongside the total for the current approved Budget Plan (Current Budget Plan Total). These two values are then compared in order to generate the total current Variance for the project. A positive amount in the Variance column indicates the project is under budget, while a negative amount indicates the project is over budget. Results may be filtered by: Project ID, Project Name, Manager, and whether the project is Active (Yes, No, All). By default, the portlet will display only Active projects.</p>
EX0093	Project Cost Plan Variance - SQL Server	theWorX™	Portlet	<p>The Project Cost Plan Variance portlet displays the variance between the budget and cost plans for projects the logged in user has security rights to view. The total for the Cost Plan that is marked as the Plan of Record for the project (Current Cost Plan Total), alongside the total for the current approved Budget Plan (Current Budget Plan Total). These two values are then compared in order to generate the total current Variance for the project. A positive amount in the Variance column indicates the project is under budget, while a negative amount indicates the project is over budget. Results may be filtered by: Project ID, Project Name, Manager, and whether the project is Active (Yes, No, All). By default, the portlet will display only Active projects.</p>
EX0094	Project Cost Within Budget - Oracle	theWorX™	Portlet	<p>The Project Cost Within Budget portlet shows all projects that are within or exceeding their budgets in a pie chart. The user may filter by OBS and finish dates to narrow the projects. This portlet provides management with a graphical representation of the overall status of cost on all projects.</p>
EX0094	Project Cost Within Budget - SQL Server	theWorX™	Portlet	<p>The Project Cost Within Budget portlet shows all projects that are within or exceeding their budgets in a pie chart. The user may filter by OBS and finish dates to narrow the projects. This portlet provides management with a graphical representation of the overall status of cost on all projects.</p>

EX0083	Project Manager Dashboard - Oracle	theBasiX™	Portlet	The PM Dashboard portlet provides an overview of all projects for which the user is the Project Manager without navigating to and opening each project individually. All critical information related to the project status is displayed in this portlet. Status indicators display the project's statuses. Graphical stoplights and numbers provide an overview of all late Action items, Issues, Risks, Tasks, and Milestones.
EX0083	Project Manager Dashboard - SQL Server	theBasiX™	Portlet	The PM Dashboard portlet provides an overview of all projects for which the user is the Project Manager without navigating to and opening each project individually. All critical information related to the project status is displayed in this portlet. Status indicators display the project's statuses. Graphical stoplights and numbers provide an overview of all late Action items, Issues, Risks, Tasks, and Milestones.
EX0095	Project Variances - Oracle	theWorX™	Portlet	This Project Variances portlet provides a project manager a consolidated view of all of their active projects and open project tasks, and shows them the baseline variance for the task EACs and the task start and finish dates. This gives the project manager a single place to view and manage how their projects are progressing against their baselines. The PM can easily detect when projects are running behind and pinpoint, which tasks are causing the variance in the schedule.
EX0095	Project Variances - SQL Server	theWorX™	Portlet	This Project Variances portlet provides a project manager a consolidated view of all of their active projects and open project tasks, and shows them the baseline variance for the task EACs and the task start and finish dates. This gives the project manager a single place to view and manage how their projects are progressing against their baselines. The PM can easily detect when projects are running behind and pinpoint, which tasks are causing the variance in the schedule.
EX0097	Projects by Stage and Manager - Oracle	theWorX™	Portlet	The Projects by Stage and Manager portlet displays all active projects (excluding programs), with a project stage and project manager. The portlet color codes the different stages and counts the number of projects in each stage by project manager. This portlet provides a quick snapshot of all projects with stage details so the PMO may get an overview of where certain projects are sitting with each Project Manager.
EX0097	Projects by Stage and Manager - SQL Server	theWorX™	Portlet	The Projects by Stage and Manager portlet displays all active projects (excluding programs), with a project stage and project manager. The portlet color codes the different stages and counts the number of projects in each stage by project manager. This portlet provides a quick snapshot of all projects with stage details so the PMO may get an overview of where certain projects are sitting with each Project Manager.
EX0098	Projects Marked For Deletion - Oracle	theWorX™	Portlet	The Projects Marked for Deletion portlet displays information about projects that are currently pending deletion, but excludes templates and programs. This portlet provides an easy way to view all projects that are marked for deletion before the background job actually erases them. The portlet provide all necessary information as well as the project manager in case there are questions about why the project was marked for deletion.

EX0098	Projects Marked for Deletion - SQL Server	theWorX™	Portlet	The Projects Marked for Deletion portlet displays information about projects that are currently pending deletion, but excludes templates and programs. This portlet provides an easy way to view all projects that are marked for deletion before the background job actually erases them. The portlet provide all necessary information as well as the project manager in case there are questions about why the project was marked for deletion.
EX0100	Projects That Should Be Closed - Oracle	theWorX™	Workflow Job	The Projects That Should be Closed process displays four common criteria that closed projects usually have and displays active projects that meet these criteria in a portlet. This is especially useful for project data cleanup. This portlet will identify projects that it thinks should be closed based on: • Time Tracking • No Updates • Created date • No Issues or Risks All of the dates may be altered in the filter to allow show the projects that meet your specific criteria. For example, you may want a cut-off of 30 days without time entry, 30 days without task updates, 180 days since creation, and 30 days without Risks or Issues.
EX0100	Projects That Should be Closed - SQL Server	theWorX™	Workflow Job	The Projects That Should be Closed process displays four common criteria that closed projects usually have and displays active projects that meet these criteria in a portlet. This is especially useful for project data cleanup. This portlet will identify projects that it thinks should be closed based on: •Time Tracking •No Updates •Created date •No Issues or Risks All of the dates may be altered in the filter to allow show the projects that meet your specific criteria. For example, you may want a cut-off of 30 days without time entry, 30 days without task updates, 180 days since creation, and 30 days without Risks or Issues.
EX0101	Projects Within Baseline Effort - Oracle	theWorX™	Portlet	The Projects Within Baseline Effort portlet will display all projects' baseline effort in a pie chart by three different categories: Out of Baseline, Within Baseline, and Within 10% of Baseline. This portlet is used by the PMO to provide management with a snapshot of all projects and their baselines.
EX0101	Projects Within Baseline Effort - SQL Server	theWorX™	Portlet	The Projects Within Baseline Effort portlet will display all projects' baseline effort in a pie chart by three different categories: Out of Baseline, Within Baseline, and Within 10% of Baseline. This portlet is used by the PMO to provide management with a snapshot of all projects and their baselines.
EX0102	Projects Within Baseline Finish - Oracle	theWorX™	Portlet	The Projects Within Baseline Finish portlet displays all projects that have a baseline and presents them in a pie chart. This portlet provides management with a way to quickly view the amount of projects that are on time. The user may filter by OBS and finish date.
EX0102	Projects Within Baseline Finish - SQL Server	theWorX™	Portlet	The Projects Within Baseline Finish portlet displays all projects that have a baseline and presents them in a pie chart. This portlet provides management with a way to quickly view the amount of projects that are on time. The user may filter by OBS and finish date.
EX0676	Quick Create Buttons - Oracle &	theWorX™	Portlet	An HTML portlet that displays two buttons that link the user instantly to an object create page. The portlet comes with two buttons and the buttons can be modified to link to any creation page. Administrator can

	SQL Server			choose: Project, Idea, Application, Program, etc.
EX0029	Re-Baseline via Change Request - Oracle	theWorX™	Workflow Job	The Re-Baseline via Change Request process is a simple method for a member of the project (who has the ability to create change requests) to request a re-baseline of the project without the project manager having to perform it. First, the user must create the change request. The user must then start the process within the change request by using the Processes tab. Once started, the process will route an action item to the Project Manager. If rejected, the process will end and the user must start it again (if needed). If approved, the process will then baseline the project and close out the change request.
EX0029	Re-Baseline via Change Request - SQL Server	theWorX™	Workflow Job	The Re-Baseline via Change Request process is a simple method for a member of the project (who has the ability to create change requests) to request a re-baseline of the project without the project manager having to perform it. First, the user must create the change request. The user must then start the process within the change request by using the Processes tab. Once started, the process will route an action item to the Project Manager. If rejected, the process will end and the user must start it again (if needed). If approved, the process will then baseline the project and close out the change request.
EX0430	Reporting Strategies	theWorX™	Reports	A PowerPoint presentation reviewing the strengths and weaknesses of different report formats. Presentation reviews Portlets, Crystal Reports, WEBI Reports, Xcelsius Dashboards and External Reporting Tools.
EX0103	Reports Run - Oracle	theWorX™	Portlet	The Reports Run portlet generates a list of reports that have been run during the selected timeframe. The date range is provided via the filter. The portlet will help administrators find reports that are not frequently used to target them for removal. The portlet will tell the user the number of times the report has been run, the report name and ID, and the last ran date.
EX0103	Reports Run - SQL Server	theWorX™	Portlet	The Reports Run portlet generates a list of reports that have been run during the selected timeframe. The date range is provided via the filter. The portlet will help administrators find reports that are not frequently used to target them for removal. The portlet will tell the user the number of times the report has been run, the report name and ID, and the last ran date.
EX0260	Reset Admin Password - Oracle	theBasiX™	Technical Trick	The Reset Admin Password technical trick provides the queries necessary to reset the administrator's password via the database. Passwords are forgotten, overwritten and misplaced often; using this technical trick, the support team will always have a back-up plan to gaining back access to the system.
EX0260	Reset Admin Password - SQL Server	theBasiX™	Technical Trick	The Reset Admin Password technical trick provides the queries necessary to reset the administrator's password via the database. Passwords are forgotten, overwritten and misplaced often; using this technical trick, the support team will always have a back-up plan to gaining back access to the system.
EX0150	Resource Lookups	theWorX™	Technical	The Resource Lookups in a Group technical trick provides step-by-step instructions on creating a resource

	in a Group - Oracle		Trick	lookup based on members of a particular security group. For some fields, you want to narrow the amount of resources that the resource browse window supplies. By adding the selected users to a specific security group, the administrator may only display those resources in a resource browse window on the application side.
EX0150	Resource Lookups in a Group - SQL Server	theBasiX™	Technical Trick	The Resource Lookups in a Group technical trick provides step-by-step instructions on creating a resource lookup based on members of a particular security group. For some fields, you want to narrow the amount of resources that the resource browse window supplies. By adding the selected users to a specific security group, the administrator may only display those resources in a resource browse window on the application side.
EX0665	Resource Map	theWorX™	Portlet	The Resource Map portlet is designed to display resource counts, by country, on a map of the world. Clicking one of the resource markers on the map will display the total resource count for that country. Additionally, a link is provided that connects to a grid portlet which displays all resources that reside in that country. The ability to zoom in and out on areas of the world is available. Due to the requirements outlined in the Special Installation Instructions section, this portlet requires 2-3 Rego Consulting hours to install. Further customization of the data on this map and its associated grid portlet may be requested. Please contact us for more details.
EX0104	Resource Rights - Oracle	theWorX™	Portlet	The Resource Rights portlet displays information for all global, OBS, and instance based rights that are present in the system. This portlet can easily determine who has certain rights and what is causing them to retain a certain license status (creator, studio developer, etc).
EX0104	Resource Rights - SQL Server	theWorX™	Portlet	The Resource Rights portlet displays information for all global, OBS, and instance based rights that are present in the system. This portlet can easily determine who has certain rights and what is causing them to retain a certain license status (creator, studio developer, etc).
EX0151	Resource Time by Investment - Detail - Oracle	theWorX™	Portlet	The Resource Time by Investment Detail portlet gives the Resource Manager the ability to search for time reported by resources against investments. The portlet provides filters for specific dates, a particular project and/or Project Manager. Using this portlet, the RM can get an overview of all data in a time period, the overall time logged to a project and the breakdown of his or her resources' hours on that project.
EX0151	Resource Time by Investment - Detail - SQL Server	theWorX™	Portlet	The Resource Time by Investment Detail portlet gives the Resource Manager the ability to search for time reported by resources against investments. The portlet provides filters for specific dates, a particular project and/or Project Manager. Using this portlet, the RM can get an overview of all data in a time period, the overall time logged to a project and the breakdown of his or her resource's hours on that project.
EX0152	Resource Time by Investment - Pie -	theWorX™	Portlet	The Resource Time by Investment - Pie portlet shows a graphical representation of the time spent on investments for all resources where the logged in user is selected as the resource manager. The portlet

	Oracle			gives the Resource Manager the ability to quickly view all time reported by resources against projects. The portlet filters between specific dates using the daily actuals timeslice. The pie chart provides a graphical view as to how time is divided across projects.
EX0152	Resource Time by Investment - Pie - SQL Server	theWorX™	Portlet	The Resource Time by Investment - Pie portlet shows a graphical representation of the time spent on investments for all resources where the logged in user is selected as the resource manager. The portlet gives the Resource Manager the ability to quickly view all time reported by resources against projects. The portlet filters between specific dates using the daily actuals timeslice. The pie chart provides a graphical view as to how time is divided across projects.
EX0105	Resource Vacation - Oracle	theWorX™	Portlet	The Resource Vacation portlet allows a resource manager to view a resource's current annual vacation allowance, as set by the resource manager, against the resource's vacation calendar hours and actual posted timesheet hours. This portlet is useful for determining the amount of hours a resource has requested off and has remaining. This portlet also ensures the resource has accounted for all annual vacation allowance hours in the calendar and has posted time for all past calendar request hours.
EX0105	Resource Vacation - SQL Server	theWorX™	Portlet	The Resource Vacation portlet allows a resource manager to view a resource's current annual vacation allowance, as set by the resource manager, against the resource's vacation calendar hours and actual posted timesheet hours. This portlet is useful for determining the amount of hours a resource has requested off and has remaining. This portlet also ensures the resource has accounted for all annual vacation allowance hours in the calendar and has posted time for all past calendar request hours.
EX0106	Resource Vacation Details - Oracle	theWorX™	Portlet	The Resource Vacation Details portlet allows a resource manager, or administrator, to see a resource's calendar at a glance, displayed by week or month for a selected time period. This portlet shows the Resource Name, Resource Manager, Calendar, H (holiday), and V (vacation) hours for the select time frame.
EX0106	Resource Vacation Details - SQL Server	theWorX™	Portlet	The Resource Vacation Details portlet allows a resource manager, or administrator, to see a resource's calendar at a glance, displayed by week or month for a selected time period. This portlet shows the Resource Name, Resource Manager, Calendar, H (holiday), and V (vacation) hours for the select time frame.
EX0107	Resources in Security Groups / Users in Groups - Oracle	theBasiX™	Portlet	The Resources in Security Groups / Users in Groups portlet shows security group information for resources. (Note: the information displayed is dependent on what the user has security rights to view.) The portlet displays the Group, Group ID, if the Group is active, Resource, User Name and User Status. This portlet also includes the ability to filter on a specific group or resource, by whether the group is active, by user status or OBS.

EX0107	Resources in Security Groups / Users in Groups - SQL Server	theBasiX™	Portlet	The Resources in Security Groups / Users in Groups portlet shows security group information for resources. (Note: the information displayed is dependent on what the user has security rights to view.) The portlet displays the Group, Group ID, if the Group is active, Resource, User Name and User Status. This portlet also includes the ability to filter on a specific group or resource, by whether the group is active, by user status or OBS.
EX0111	Resources' Skills - Oracle	theWorX™	Portlet	The Resources' Skills portlet displays all resources, skills, proficiencies, and interests. Using this portlet, resource managers can quickly assess all skills within the system for their resources. The portlet results may be filtered on: Skill, Resource Last Name, Interest and Proficiency.
EX0111	Resources' Skills - SQL Server	theWorX™	Portlet	The Resources' Skills portlet displays all resources, skills, proficiencies, and interests. Using this portlet, resource managers can quickly assess all skills within the system for their resources. The portlet results may be filtered on: Skill, Resource Last Name, Interest and Proficiency.
EX0238	Role Removal	theWorX™	Technical Trick	The Role Removal Technical Trick provides the information for the creation of the following tables and columns which are necessary to perform the role removal: 1. Role - mapping table 2. Tables / Columns that need to be updated with Resource ID fields 3. Tables / Columns that need to be updated with Role Code fields 4. Tables that will need to be deleted 5. PRTEAM table should be checked In many instances, having excess information stored within the database can cause poor performance or slowness when retrieving data. Administrators are always seeking out ways to clean and remove unused information. This technical trick on role removal provides the steps necessary to remove roles that would otherwise be unused and eliminating unwanted information.
EX0112	Scheduled Jobs Cleanup - Oracle	theWorX™	Workflow Job	The Scheduled Jobs Cleanup process removes all completed job instances that have run before a date set by the administrator. The administrator may use the gel parameter to update the amount of days since each job has run. Based on that date, the workflow will eliminate all jobs that have surpassed that threshold. This workflow helps administrators maintain the job logs and queue by eliminating jobs that users have potentially forgotten to remove on their own.
EX0112	Scheduled Jobs Cleanup - SQL Server	theWorX™	Workflow Job	The Scheduled Jobs Cleanup process removes all completed job instances that have run before a date set by the administrator. The administrator may use the gel parameter to update the amount of days since each job has run. Based on that date, the workflow will eliminate all jobs that have surpassed that threshold. This workflow helps administrators maintain the job logs and queue by eliminating jobs that users have potentially forgotten to remove on their own.
EX0113	Self Assign - Oracle	theWorX™	Workflow Job	The Self Assign workflow process updates a selected resource field on an object based on someone checking a boolean field on the same object. Using this process, whomever is editing the object, will be placed in this field automatically eliminating the need for each user to come in and update the field

				manually. The field will run when the Boolean is ticked and the user saves the page. It is important to note that the page will need to be reloaded to see the changes reflected. This can be used as a fast way to self-assign yourself to an object - you can create a boolean field that is checked and have the process assign you to that item.
EX0113	Self Assign - SQL Server	theWorX™	Workflow Job	The Self Assign workflow process updates a selected resource field on an object based on someone checking a boolean field on the same object. Using this process, whomever is editing the object, will be placed in this field automatically eliminating the need for each user to come in and update the field manually. The field will run when the Boolean is ticked and the user saves the page. It is important to note that the page will need to be reloaded to see the changes reflected. This can be used as a fast way to self-assign yourself to an object - you can create a boolean field that is checked and have the process assign you to that item.
EX0120	Simple Time Tracking Stalker - Resource - Oracle	theBasiX™	Workflow Job	The Time Tracking Stalker – Resource workflow process is used to notify resources that fail to submit a timesheet in a prior week. The workflow checks for active resources, hire/termination dates, track mode, and open for time entry. This process helps to ensure resources submit timesheets in a timely manner. In version 13, the email can be enhanced to include colors, bold, underline, and other HTML formatting.
EX0120	Simple Time Tracking Stalker - Resource - SQL Server	theBasiX™	Workflow Job	The Time Tracking Stalker – Resource workflow process is used to notify resources that fail to submit a timesheet in a prior week. The workflow checks for active resources, hire/termination dates, track mode, and open for time entry. This process helps to ensure resources submit timesheets in a timely manner. In version 13, the email can be enhanced to include colors, bold, underline, and other HTML formatting.
EX0121	Simple Time Tracking Stalker - Resource Manager - Oracle	theWorX™	Workflow Job	The Time Tracking Stalker - RM workflow process automatically sends an email to Resource Managers for each one of their resources that have not submitted their timesheet for a prior open time period, thus informing the RM if their resources are submitting their timesheets on time. Project Managers will also benefit since the notifications will help to ensure that time is being posted against their projects in a timely manner, helping to provide them with an accurate view of time expended on the projects.
EX0121	Simple Time Tracking Stalker – Resource Manager - SQL Server	theWorX™	Workflow Job	The Time Tracking Stalker - RM workflow process automatically sends an email to Resource Managers for each one of their resources that have not submitted their timesheet for a prior open time period, thus informing the RM if their resources are submitting their timesheets on time. Project Managers will also benefit since the notifications will help to ensure that time is being posted against their projects in a timely manner, helping to provide them with an accurate view of time expended on the projects.
EX0114	Status Report Publish - Oracle	theWorX™	Workflow Job	The Status Report Publish workflow process pushes values from the status report subobject to the parent project object. The process is started when the user ticks the “Publish” boolean field on the status report (custom field added). This workflow will update the project object with the overall status indicator, the

				status comment, the previous overall status, and the as of date. This eliminates the project manager having to update the fields in both the status report and the project overall.
EX0114	Status Report Publish - SQL Server	theWorX™	Workflow Job	The Status Report Publish workflow process pushes values from the status report subobject to the parent project object. The process is started when the user ticks the “Publish” boolean field on the status report (custom field added). This workflow will update the project object with the overall status indicator, the status comment, the previous overall status, and the as of date. This eliminates the project manager having to update the fields in both the status report and the project overall.
EX0115	Time by Assignment - Oracle	theWorX™	Portlet	The Time by Assignment portlet displays time logged to assignments for all investments the logged in user has security rights to view - pulling data from the timeslices. It is capable of displaying the data by weekly, monthly or quarterly segments. The portlet may also be filtered by investment and resource OBS.
EX0115	Time by Assignment - SQL Server	theWorX™	Portlet	The Time by Assignment portlet displays time logged to assignments for all investments the logged in user has security rights to view - pulling data from the timeslices. It is capable of displaying the data by weekly, monthly or quarterly segments. The portlet may also be filtered by investment and resource OBS.
EX0116	Time by Investment - Oracle	theBasiX™	Portlet	The Time by Investment portlet displays time logged to investments for all investments the logged in user has security rights to view - pulling data from the timeslices. It is capable of displaying the data by weekly, monthly or quarterly segments. The portlet may also be filtered by investment and resource OBS.
EX0116	Time by Investment - SQL Server	theBasiX™	Portlet	The Time by Investment portlet displays time logged to investments for all investments the logged in user has security rights to view - pulling data from the timeslices. It is capable of displaying the data by weekly, monthly or quarterly segments. The portlet may also be filtered by investment and resource OBS.
EX0117	Time by Resource - Oracle	theBasiX™	Portlet	The Time by Resource portlet displays time logged to projects by resource. It is capable of displaying the data by weekly, monthly or quarterly segments. The portlet may also be filtered by investment name, resource name, or resource OBS.
EX0117	Time by Resource - SQL Server	theBasiX™	Portlet	The Time by Resource portlet displays time logged to projects by resource for all resources the logged in user has security rights to view - pulling data from the timeslices. This portlet may be used to determine the amount of time logged by a resource to a particular investment without having to enter each project or open the user’s timesheets. It is capable of displaying the data by weekly, monthly or quarterly segments. The portlet may also be filtered by investment name, resource name, or resource OBS.
EX0118	Time by Resource and Investment - PM - Oracle	theWorX™	Portlet	The Time By Resource and Investment - PM portlet shows time spent on projects where the logged in user is the project manager. This portlet is used to get a snapshot of investments and the time that has been put against them at the individual resource level for the projects that user has access to. This portlet is used for determining what resources have put time against specific investments and can be used to see

				where resources are spending their time or to help rationalize ETCs for remaining work for planning purposes. The portlet may be filtered by time-scale, date, resource or investment to narrow the search results.
EX0118	Time by Resource and Investment - PM - SQL Server	theWorX™	Portlet	The Time By Resource and Investment - PM portlet shows time spent on projects where the logged in user is the project manager. This portlet is used to get a snapshot of investments and the time that has been put against them at the individual resource level for the projects that user has access to. This portlet is used for determining what resources have put time against specific investments and can be used to see where resources are spending their time or to help rationalize ETCs for remaining work for planning purposes. The portlet may be filtered by time-scale, date, resource or investment to narrow the search results.
EX0213	Time by Stage and Timescale - Graph - Oracle	theWorX™	Portlet	The Time by Stage and Timescale – Graph portlet displays a graphical representation of hours for all tasks, by stage, for a user-defined time period on projects. The user may filter the results on: Time Scale, Resource OBS Unit, and Date Range. This portlet pulls data from the timeslices. Using this portlet, management can determine if excess time is being spent on certain task stages within projects.
EX0213	Time by Stage and Timescale - Graph - SQL Server	theWorX™	Portlet	The Time by Stage and Timescale – Graph portlet displays a graphical representation of hours for all tasks, by stage, for a user-defined time period on projects. The user may filter the results on: Time Scale, Resource OBS Unit, and Date Range. This portlet pulls data from the timeslices. Using this portlet, management can determine if excess time is being spent on certain task stages within projects.
EX0206	Time by Stage and Timescale - Grid - Oracle	theBasiX™	Portlet	The Time by Stage and Timescale – Grid portlet displays hours for all tasks on projects by their stage for a user-defined time period. The user may narrow the results by time scale, resource OBS unit, and dates. The portlet not only provides the total hours per stage, but also the percentage of time spent on each task type. This portlet pulls data from the timeslices. Using this portlet, management can determine if excess time is being spent on a certain task stage within a project.
EX0206	Time by Stage and Timescale - Grid - SQL Server	theBasiX™	Portlet	The Time by Stage and Timescale – Grid portlet displays hours for all tasks on projects by their stage for a user-defined time period. The user may narrow the results by time scale, resource OBS unit, and dates. The portlet not only provides the total hours per stage, but also the percentage of time spent on each task type. This portlet pulls data from the timeslices. Using this portlet, management can determine if excess time is being spent on a certain task stage within a project.
EX0119	Time by Task - Oracle	theWorX™	Portlet	The Time by Task portlet displays time logged to tasks for all investments the logged in user has security rights to view - pulling data from the timeslices. It is capable of displaying the data by weekly, monthly, quarterly or annually segments. The portlet may also be filtered by investment and resource OBS.

EX0119	Time by Task - SQL Server	theWorX™	Portlet	The Time by Task portlet displays time logged to tasks for all investments the logged in user has security rights to view - pulling data from the timeslices. It is capable of displaying the data by weekly, monthly, quarterly or annually segments. The portlet may also be filtered by investment and resource OBS.
EX0215	Time by Task Stage - Oracle	theWorX™	Portlet	The Time by Stage portlet displays time logged to each project task stage. The portlet displays the project id, project name, task stage, and charge code for each different task stage on the project. This portlet provides management with a quick view of all project task stages by project without having to navigate into each project individually.
EX0215	Time by Task Stage - SQL Server	theWorX™	Portlet	The Time by Stage portlet displays time logged to each project task stage. The portlet displays the project id, project name, task stage, and charge code for each different task stage on the project. This portlet provides management with a quick view of all project task stages by project without having to navigate into each project individually.
EX0154	Time by Type - Pie Chart - Oracle	theBasiX™	Portlet	The Time By Type - Pie Chart portlet is a graphical representation of time by type of investment for all resources the logged in user has security rights to view. This portlet pulls from the daily timeslices, and can be used for determining what types of projects receive the majority of hours. The filter option allows for entry of a specific start date and finish date.
EX0154	Time by Type – Pie Chart - SQL Server	theBasiX™	Portlet	The Time By Type - Pie Chart portlet is a graphical representation of time by type of investment for all resources the logged in user has security rights to view. This portlet pulls from the daily timeslices, and can be used for determining what types of projects receive the majority of hours. The filter option allows for entry of a specific start date and finish date.
EX0205	Time Off by Day - Oracle	theWorX™	Portlet	The Time Off by Day portlet displays resource availability by day. The portlet results may be filtered on: Resource Manager, Booking Manager, Resource, OBS Unit, and Date Range. This portlet will display the availability for each resource by day in separate columns and obtains the information from the time slices. When the portlet encounters an exception day (personal day off, or holiday on the base calendar), a yellow caution icon will appear within the same cell. Using this portlet, resource managers are able to quickly determine availability for their resources over a set time range.
EX0205	Time Off by Day - SQL Server	theWorX™	Portlet	The Time Off by Day portlet displays resource availability by day. The portlet results may be filtered on: Resource Manager, Booking Manager, Resource, OBS Unit, and Date Range. This portlet will display the availability for each resource by day in separate columns and obtains the information from the time slices. When the portlet encounters an exception day (personal day off, or holiday on the base calendar), a yellow caution icon will appear within the same cell. Using this portlet, resource managers are able to quickly determine availability for their resources over a set time range.

EX0155	Timesheet Approval - Auto - Oracle	theWorX™	Workflow Job	The Timesheet Approval - Auto process is an auto-start process that begins once the resource submits his or her timesheet. This process bypasses a Resource Manager approval and allows the user to post his or her timesheet. Once the timesheet is submitted, the process will lock the user's timesheet to prevent editing. The process will then select the next action based on three different factors: 1) The timesheet has less than 40 hours. 2) The timesheet has 40 or more hours. 3) The resource's availability is less than 8hrs/day. If the user has submitted a timesheet with less than 40 hours, then the process will email the user informing him/her of the issue, unlock the timesheet, and change the status to "Returned". If the user has an availability of less than 8hrs/day or the timesheet has 40 or more hours, then an action item will be sent to the user as a last step before the timesheet is approved. Once the timesheet is approved, then the script will set the status of the timesheet to "Approved" and unlock the timesheet.
EX0155	Timesheet Approval - Auto - SQL Server	theWorX™	Workflow Job	The Timesheet Approval - Auto process is an auto-start process that begins once the resource submits his or her timesheet. This process bypasses a Resource Manager approval and allows the user to post his or her timesheet. Once the timesheet is submitted, the process will lock the user's timesheet to prevent editing. The process will then select the next action based on three different factors: 1) The timesheet has less than 40 hours. 2) The timesheet has 40 or more hours. 3) The resource's availability is less than 8hrs/day. If the user has submitted a timesheet with less than 40 hours, then the process will email the user informing him/her of the issue, unlock the timesheet, and change the status to "Returned". If the user has an availability of less than 8hrs/day or the timesheet has 40 or more hours, then an action item will be sent to the user as a last step before the timesheet is approved. Once the timesheet is approved, then the script will set the status of the timesheet to "Approved" and unlock the timesheet.
EX0122	Timesheet Approval - PM and RM - Oracle	theWorX™	Workflow Job	The Timesheet Approval - RM and PM process is an auto-start process that begins once the resource submits his or her timesheet. This process provides a checks-and-balances style to ensure that all resources entering time have entered the 40 hours. Once the timesheet is submitted, the process will lock the user's timesheet to prevent editing. The process will then select the next action based on three different factors: 1) The timesheet has less than 40 hours. 2) The timesheet has 40 or more hours. 3) The resource's availability is less than 8hrs/day. If the user has submitted a timesheet with less than 40 hours, then the process will email the user informing him/her of issue, unlocks the timesheet, and changes the status to "Returned". If the user has an availability of less than 8hrs/day or the timesheet has 40 or more hours, then an action item will be sent to the resource manager informing him/her of the timesheet. If the resource manager (RM) AND project manager (PM) approves the action item, then the process will approve the timesheet and unlock the timesheet. However, if the RM or PM selects "Return" on the action item, then the process will return the timesheet, mail the user that informing him/her that the timesheet has been returned, and unlock the timesheet.

EX0122	Timesheet Approval - PM and RM - SQL Server	theWorX™	Workflow Job	The Timesheet Approval - RM and PM process is an auto-start process that begins once the resource submits his or her timesheet. This process provides a checks-and-balances style to ensure that all resources entering time have entered the 40 hours. Once the timesheet is submitted, the process will lock the user's timesheet to prevent editing. The process will then select the next action based on three different factors: 1) The timesheet has less than 40 hours. 2) The timesheet has 40 or more hours. 3) The resource's availability is less than 8hrs/day. If the user has submitted a timesheet with less than 40 hours, then the process will email the user informing him/her of issue, unlocks the timesheet, and changes the status to "Returned". If the user has an availability of less than 8hrs/day or the timesheet has 40 or more hours, then an action item will be sent to the resource manager informing him/her of the timesheet. If the resource manager (RM) AND project manager (PM) approves the action item, then the process will approve the timesheet and unlock the timesheet. However, if the RM or PM selects "Return" on the action item, then the process will return the timesheet, mail the user that informing him/her that the timesheet has been returned, and unlock the timesheet.
EX0162	Timesheet Approval - RM - Oracle	theWorX™	Workflow Job	The Timesheet Approval - RM process is an auto-start process that begins once the resource submits his or her timesheet. This process provides a checks-and-balances style to ensure that all resources entering time have entered the 40 hours. Once the timesheet is submitted, the process will lock the user's timesheet to prevent editing. The process will then select the next action based on three different factors: 1) The timesheet has less than 40 hours. 2) The timesheet has 40 or more hours. 3) The resource's availability is less than 8hrs/day. If the user has submitted a timesheet with less than 40 hours, then the process will email the user informing him/her of issue, unlocks the timesheet, and changes the status to "Returned". If the user has an availability of less than 8hrs/day or the timesheet has 40 or more hours, then an action item will be sent to the resource manager informing him/her of the timesheet. If the resource manager (RM) approves the action item, then the process will approve the timesheet and unlock the timesheet. However, if the RM selects "Return" on the action item, then the process will return the timesheet, mail the user that informing him/her that the timesheet has been returned, and unlock the timesheet.
EX0162	Timesheet Approval - RM - SQL Server	theWorX™	Workflow Job	The Timesheet Approval - RM process is an auto-start process that begins once the resource submits his or her timesheet. This process provides a checks-and-balances style to ensure that all resources entering time have entered the 40 hours. Once the timesheet is submitted, the process will lock the user's timesheet to prevent editing. The process will then select the next action based on three different factors: 1) The timesheet has less than 40 hours. 2) The timesheet has 40 or more hours. 3) The resource's availability is less than 8hrs/day. If the user has submitted a timesheet with less than 40 hours, then the process will email the user informing him/her of issue, unlocks the timesheet, and changes the status to "Returned". If the user has an availability of less than 8hrs/day or the timesheet has 40 or more hours,

				then an action item will be sent to the resource manager informing him/her of the timesheet. If the resource manager (RM) approves the action item, then the process will approve the timesheet and unlock the timesheet. However, if the RM selects "Return" on the action item, then the process will return the timesheet, mail the user that informing him/her that the timesheet has been returned, and unlock the timesheet.
EX0124	Transfer Primary Skill - Oracle	theWorX™	Workflow Job	The Transfer Primary Skill process updates the primary skill on the team object by running the process with the execute process job. The process takes the primary skill that is on the resource object and moves it to all of that resource's team records where the primary skill on the team record is null. Utilizing these fields and process provide a quick way to determine what skill each resource is bringing to the project. This process makes the transition seamless from resource primary skill to team primary skill.
EX0124	Transfer Primary Skill - SQL Server	theWorX™	Workflow Job	The Transfer Primary Skill process updates the primary skill on the team object by running the process with the execute process job. The process takes the primary skill that is on the resource object and moves it to all of that resource's team records where the primary skill on the team record is null. Utilizing these fields and process provide a quick way to determine what skill each resource is bringing to the project. This process makes the transition seamless from resource primary skill to team primary skill.
EX0125	Turn Off Notifications for All - Oracle	theWorX™	Workflow Job	The Turn off Notifications process disables all Email, SMS and Alerts notifications for all users. This process is helpful if users would not liked to receive emails from the system regarding actions items, timesheet submissions, etc. The script may be modified to include all users or all users that have been created within the last day.
EX0125	Turn Off Notifications for All - SQL Server	theWorX™	Workflow Job	The Turn off Notifications process disables all Email, SMS and Alerts notifications for all users. This process is helpful if users would not like to receive emails from the system regarding actions items, timesheet submissions, etc. The script may be modified to include all users or all users that have been created within the last day.
EX0126	Unlock Projects - Oracle	theBasiX™	Workflow Job	The Unlock Projects workflow process can be run through the "Execute a Process" job. The workflow will execute a query that will automatically unlock projects that have been exported / checked out for over 2 days. This prevents any projects from remaining in the "locked" state for a long period of time, preventing time from posting to these projects.
EX0126	Unlock Projects - SQL Server	theBasiX™	Workflow Job	The Unlock Projects workflow process can be run through the "Execute a Process" job. The workflow will execute a query that will automatically unlock projects that have been exported / checked out for over 2 days. This prevents any projects from remaining in the "locked" state for a long period of time, preventing time from posting to these projects.

EX0127	Update Email IDs - Oracle	theWorX™	Workflow Job	The Update Email Ids workflow sets all users' email addresses to non-working by appending a "ZZZZ" to the end of the email address. This process is used for when there are refreshes to your Development or Testing environments and do not want emails going to users. When complete, the log will display the total amount of email addresses updated. A second process is included in this workflow that will revert the email addresses to remove the "ZZZZ" added in the first workflow. In some instances, the process may be run in error, or you may want to send emails from a Development or Testing environment; using this second process you will be able to enable all emails again.
EX0127	Update Email IDs - SQL Server	theWorX™	Workflow Job	The Update Email Ids workflow sets all users' email addresses to non-working by appending a "ZZZZ" to the end of the email address. This process is used for when there are refreshes to your Development or Testing environments and do not want emails going to users. When complete, the log will display the total amount of email addresses updated. A second process is included in this workflow that will revert the email addresses to remove the "ZZZZ" added in the first workflow. In some instances, the process may be run in error, or you may want to send emails from a Development or Testing environment; using this second process you will be able to enable all emails again.
EX0128	Users Logged In - Oracle	theBasiX™	Portlet	The Users Logged In portlet displays all users logged into the system. This portlet is helpful to determine the capacity during peak times, users still working before downtime, and the ability to view users logged in during the day. The portlet will display the resource, ID, OBS unit, OBS path, and when the user's session was last updated.
EX0128	Users Logged In - SQL Server	theBasiX™	Portlet	The Users Logged In portlet displays all users logged into the system. This portlet is helpful to determine the capacity during peak times, users still working before downtime, and the ability to view users logged in during the day. The portlet will display the resource, ID, OBS unit, OBS path, and when the user's session was last updated.
EX0129	Using Consistent Colors	theWorX™	Technical Trick	The Using Consistent Colors technical trick shows how management can create a uniform color pallet for all charts within the system. This trick, not only makes charts more professional when delivering to management, but also creates a uniform pattern throughout the Clarity environment.
EX0596	Using Microsoft Project with CA Clarity PPM - Handbook	theWorX™	Training Documents	A handbook for utilizing successfully managing a schedule utilizing MSP and CA Clarity PPM. Covers the details of schedule management using MSP in conjunction with Clarity as well as tips and tricks for working with the two tools. This handbook should be utilized in conjunction with Using MSP With Clarity – PowerPoint Presentation.
EX0598	Using Microsoft Project with CA Clarity PPM -	theWorX™	Training Documents	A training PPT for utilizing successfully managing a schedule utilizing MSP and CA Clarity PPM. Covers the details of schedule management using MSP in conjunction with Clarity as well as tips and tricks for working with the two tools. This handbook should be utilized in conjunction with Using MSP With Clarity –



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	PowerPoint Presentation			Handbook.
EX0258	Viewing Old Timesheets - Oracle & SQL Server	theWorX™	Technical Trick	The View Old Timesheets In Clarity technical trick provides the steps needed to allow a user to view old timesheets, which cannot be done using out of the box Clarity functionality. The document explains the steps needed to review an old timesheet in a closed period. This technical trick provides a simple workaround to a rather common task for the Clarity support/user team.