



Clarity Audit Module

Objective

Audit Trails captured for various Clarity Features (objects) that includes the object, record, attribute, old value, new value, change dates, and changed by for Change Requests, Cost Plan, Issues, Key Decisions, On Time Delivery, Project, Risk, Status Reports, Tasks and Team

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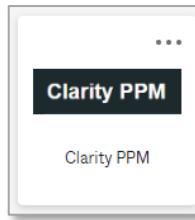
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Clarity Access

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- Access Clarity through Okta
<https://discounttire.okta.com/app/UserHome?fromLogin=true>
 - Username: 6-digit Employee number
 - Password: Windows Active Directory Password
 - Select Clarity PPM

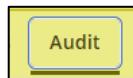


Note: If you don't have credentials, send an email to Support (support@discounttire.com) to create an Incident ticket for the password to be provided, or in Service Now enter in a General Request requesting access

Audit Module

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- Open up the Audit module in Clarity



- Choose the **DT Standard View** from the View dropdown that will provide the desired layout for the Audit view



The view groups by Object (e.g., Change Request, Cost Plan Detail, Issue, Key Decisions, OTD, Project, Risk, Status Report, Task, and Team) and sorts in descending Changed Date order.

Note: If the grouping is removed, the view sorts all entries in descending Change Date order

Object									
Group	Object	Record	Attribute	Operation	Old Value	New Value	Changed Date	Changed By	Attribute ID
> Change Request (17)									
> Cost Plan Detail (62)									
> Issue (13)									
> Key Decisions (4)									
> OTD (196)									
> Project (32)									
> Risk (16)									
> Status Report (13)									
> Task (303)									
> Team (536)									

Select the greater sign to expand the Object grouping for the details

Group	Object	Record	Attribute	Operation	Old Value	New Value	Changed Date	Changed By	Attribute ID
Project (32)									
Project	Methodolog...	Committed Sta...	Update	2023-07-27T0...	2023-07-04T...	Jun 28, 2023 12:42 pm	Scott, Steve	dt_stgnddate	
Project	Methodolog...	Stage	Update	Research	Study	Jun 28, 2023 12:41 pm	Scott, Steve	stage_code	
Project	Methodolog...	Committed Sta...	Update	2023-05-15T0...	2023-07-27T...	Jun 28, 2023 12:40 pm	Scott, Steve	dt_stgnddate	
Project	Methodolog...	Stage	Update	Study	Research	Jun 28, 2023 12:40 pm	Scott, Steve	stage_code	
Project	Methodolog...	Finish	Update	2023-08-30T1...	2023-08-31T...	Jun 21, 2023 11:49 am	Scott, Steve	schedule_finish	
Project	Methodolog...	Finish	Update	2023-08-30T...	2023-08-30T...	Jun 09, 2023 11:33 am	Scott, Steve	schedule_finish	
Project	Methodolog...	Committed Go...	Update	2023-06-01T...	2023-06-01T...	May 19, 2023 3:35 pm	Scott, Steve	dt_go_live	
Project	Methodolog...	Target Go-Live ...	Update	2023-05-31T...	2023-05-31T...	May 19, 2023 3:34 pm	Scott, Steve	dt_target_date	
Project	Methodolog...	Stage	Update	Intake	Study	May 19, 2023 3:25 pm	Scott, Steve	stage_code	
Project	Methodolog...	Committed Sta...	Update	2023-06-09T0...	2023-05-15T...	May 18, 2023 4:30 pm	Scott, Steve	dt_stgnddate	

Note: Refer to the Technical Specifications section for retention and attributes details

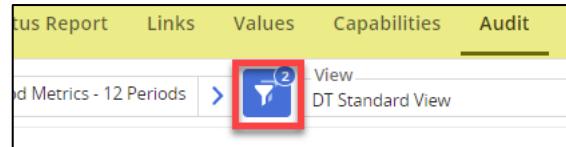
Filtering

4. Filters may be updated or confirmed by selected the Filter icon by the View selection option

It is recommended to not completely clear the Changed Date filter being that it is set for the current year, removing this option will pull all data and performance will be impacted

Note: Cannot filter on Attribute, but can on Attribute ID (included in the DT Standard View)

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Search

5. Enter Search Criteria in the search box on top of the view

Note: The Search only works for Object, Attribute and Attribute ID

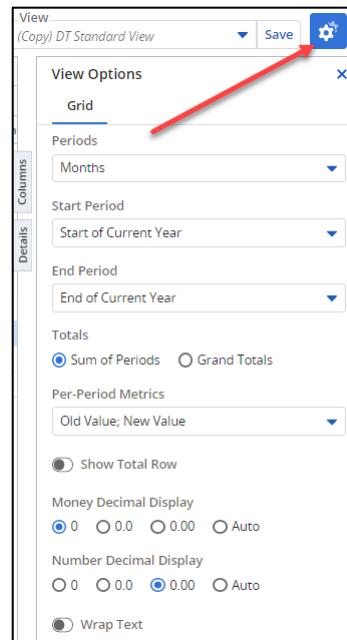
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View Options

6. Select the desired View Options by choosing the 'Gear' options menu
 - a. Periods (Weeks, Months, Quarters, Years)
 - b. Start Period (Current Period, Prior Period, Start of Current Year, Month option)
 - c. End Period (Current Period, Next Period, End of Current Year, Month option)
 - d. Totals (Sum of Periods, Grand Totals)
 - e. Per-Period Metrics (New Value, Old Value)
 - f. Show Total Row (toggle on/off)
 - g. Money Decimal Display (0, 0.0, 0.00, Auto)
 - h. Number Decimal Display (0, 0.0, 0.00, Auto)
 - i. Wrap Text (toggle on/off)

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Key Audit Rules

7. Key Audit Rules provided for feature knowledge

If you make a change that triggers other systematic changes, your name is attached to those downstream changes (e.g., you add allocations for someone beyond the current project finish date, the finish date will auto-extend, and your name will be associated with that downstream change)

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If you delete a Staff entry, all audit history associated with that Staff record is also deleted

Changes made by jobs have the name of the admin that created that job associated with them (e.g., when Carlos M. shows up, it is due to the timesheet posting job)

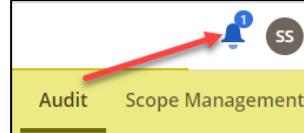
Old Value / New Value Totals for Allocation changes are in seconds; you can see the Per Period Old & New

Retention varies by Object based upon the volume of records it would generate

Export CSV

8. Steps to export a CSV version of the view/data, being the export will no longer auto-download
Note: Cannot export to CSV in Group-By mode
Select the 'x' to remove the Object Group By

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Select the down arrows in the upper left area of the view

An 'Export in progress' banner will display on the top of the view. Select Cancel to remove the message. This dismisses the message, but does not stop the export

Click on the Notifications 'bell' in the upper right hand corner of the view by your initials

Click on the CSV Export Complete – Audit – Unsaved message to download the view/data



Technical Specifications		Return to top of document
Object	Retention Days	Attributes
Capabilities	390	Capability Comments Delivered? Go Live
Change Request	180	Approved By Approved Date Assessment Date Assessor Assigned To Category Change in Cost Change in Resources Change in Schedule Closure Date Expected Closure Date Priority Review Date Status
Cost Plan Detail	180	Cost Cost Total
Idea	180	Active Manager Start Date
Issues	180	Assigned To Attribute Category Impact Date Priority Resolved By Resolved Date Status Target Resolution Date
Key Decisions	180	Name
On Time Delivery (OTD)	180	Actual Finish Date Actual Start Date Attribute Comments Committed Finish Date Committed Start Date ID Name Stage

		Target Finish Date Target Start Date
Project	180	Above the Line Active Actual Go-Live Date Attribute Committed Go-Live Date Committed Stage Finish Date Financial OBS Financial Status Finish Open for Time Entry Stage Start Target Go-Live Date Work Status
Risks	180	Assigned To Attribute Category Impact Date Priority Probability Resolved By Resolved Date Status Target Resolution Date
Status Report	90	Affected by External Factors Attribute Cost Notes Cost Status Cost Trend Arrow Current Current Phase Deliverable Scope Changed ID Latest Name Next Milestone on Track Objective Changed Overall Status Notes Overall Trend Arrow Performance Notes Performance Status Performance Trend Arrow PM Overall Status

		Portfolio Update Project Plan Document Signed Report Date Report Status Resource Notes Resource Status Resource Trend Arrow Review Approval Problems Schedule Notes Schedule Status Schedule Trend Arrow Scope Change Required Staffing/Availability Issues Update Properties What We Plan to Work On Next What We Worked On
Task	180	Cost Type Open for Time Entry Task Owner
Team (Staff)	180	Allocation Attribute Finish Open for Time Entry Primary Function Resource Role Start
Values	390	Benefit Description Benefit Owner Benefit Type Duration Frequency Initial Baseline Initial Target Measurable? Measurement Plan Measurement Type Name Recent Result Result Date
Not Audited	n/a	Assignments Cost Plan Project Transaction Scope Management To Do