Clarity To Do's Instructions

Objective

Clarity module that documents action items, specific tasks, or activities (To Do's), assigned to an owner with due dates, next check dates, priority, status, notes, category, and links to supporting documentation

Contents

P³MO Delivering Successful Portfolios, Program and Projects

Provided by: PMO
Designed by: PMO – smscott
Page **1** of **3**
© 2023 The Reinalt-Thomas Corporation
Version 1.0
Published: 8/31/23
Updated: MM/DD/YY

Clarity Access

1. Access Clarity through Okta
   https://discounttire.okta.com/app/UserHome?fromLogin=true
   a. Username: 6-digit Employee number
   b. Password: Windows Active Directory Password
   c. Select Clarity PPM
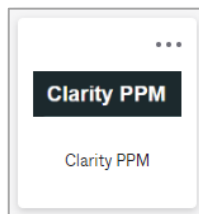
> **Note:** *If you don't have credentials, send an email to Support (support@discounttire.com) to create an Incident ticket for the password to be provided, or in Service Now enter in a General Request requesting access*
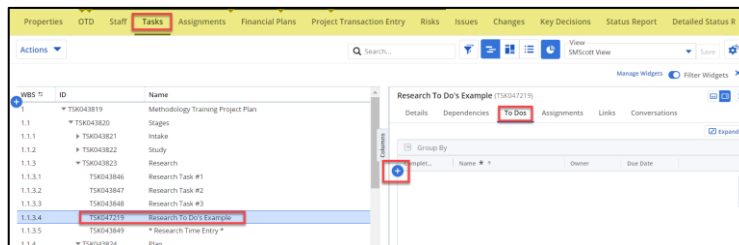
To Do's Creation

2. To Do's may be created in the following modules
   a. Tasks
   b. Risks
   c. Issues
   d. Changes
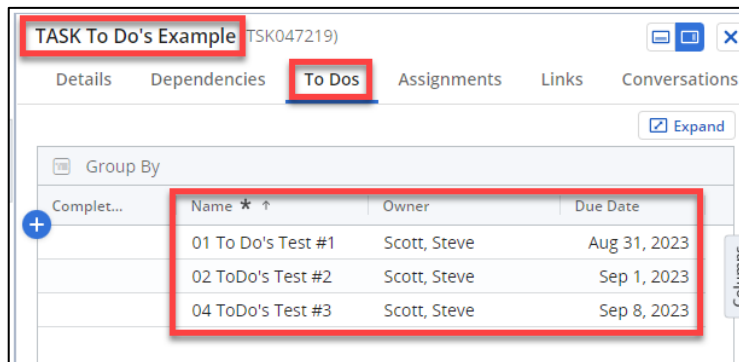   a. Investments (Project level To Do that replaces external action log)
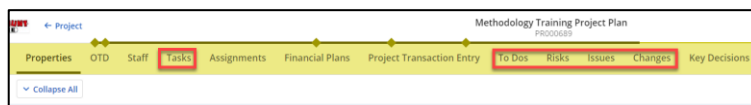
3. Create To Do's from a project Task example
   a. Enter Tasks Module
   b. Select the Task
   c. Open the Details Panel
   d. Enter the To Dos menu option
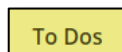   e. Select the blue plus sign to add a To Do

4. Enter Name, Owner, and Due Date for the To Do

   Note: *Due Date does not update the start and finish dates on the task*

5. Select To Do's to enter the module

6. Use the All To Dos View

Example of the To Do View

Provided by: PMO
Designed by: PMO – smscott
Page **2** of **3**
© 2023 The Reinalt-Thomas Corporation
Version 1.0
Published: 8/31/23
Updated: MM/DD/YY

Compl...		Name ★	ID ★ ↑	Related To	Related To ID	Created Date	Due Date	Owner ▽	Status	Priority	Blocked
☐	✓	01 To Do's Test #1	TD00002468	TASK To Do's Example	TSK047219	Aug 29, 2023	Aug 31, 2023	Scott, Steve	Blocked	1 - Critical	
☐		Risk To Do Example #1	TD00002472	Risk Example #1	RI1193	Aug 29, 2023	Sep 27, 2023	Scott, Steve			
☐		02 ToDo's Test #2	TD00002485	TASK To Do's Example	TSK047219	Aug 30, 2023	Sep 1, 2023	Scott, Steve	Closed	2 - High	
☐		04 ToDo's Test #3	TD00002486	TASK To Do's Example	TSK047219	Aug 30, 2023	Sep 8, 2023	Scott, Steve	In Progress	3 - Medium	
☐		Project Level To Do's	TD00002488	Methodology Training Project Plan	PR000689	Aug 30, 2023	Sep 20, 2023		In Progress	1 - Critical	
☐	✓	Issues To Do Example #1	TD00002490	Issue Example #1	IS000724	Aug 30, 2023	Sep 13, 2023	Scott, Steve	Not Started	4 - Low	
☐		Changes To Do Example #1	TD00002491	Changes Example #1	CR000233	Aug 30, 2023	Sep 21, 2023	Scott, Steve	In Progress		✓

Blocked Reason	Last Upda...	Notes	Next Che...	Link	Date Clos...	Category	Related To Type ▽	Created By	Last Updated By	Starred
Blocked Reason #1	Aug 30, 2023	Enter Notes Here	Aug 25, 2023	Include Link Here	Sep 27, 2023	Cost	Task	Scott, Steve	Scott, Steve	
Blocked Reason #2	Aug 30, 2023	Project Level To Dos are entered on this To Do Module		Include Link Here			Risk	Scott, Steve	Scott, Steve	
Enter Blocked Reason	Aug 30, 2023	Enter Notes Here		Include Link Here		Quality	Task	Scott, Steve	Scott, Steve	
	Aug 30, 2023	Project Level To Dos are entered on this To Do Module	Sep 6, 2023	Include Link Here		Resources	Task	Scott, Steve	Scott, Steve	
Enter Blocked Reason	Aug 30, 2023	Project Level To Dos are entered on this To Do Module	Sep 18, 2023	Include Link Here			Project	Scott, Steve	Scott, Steve	
	Aug 30, 2023	Enter Notes Here		Include Link Here	Sep 8, 2023	Schedule	Issue	Scott, Steve	Scott, Steve	
	Aug 30, 2023	Enter Notes Here	Sep 19, 2023	Include Link Here		Scope	Change Request	Scott, Steve	Scott, Steve	

7. Create a project level To Do by selecting the blue + icon
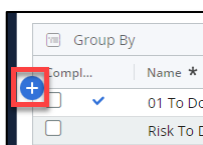
8. Data can be Filtered by selecting the filter Icon and choosing the + Add filter option
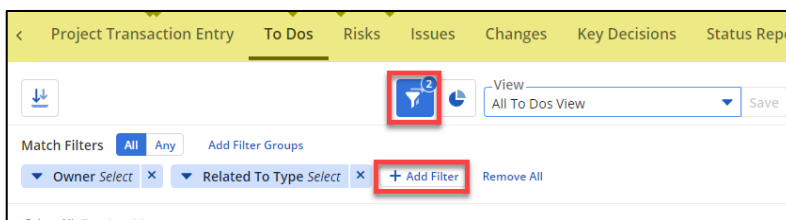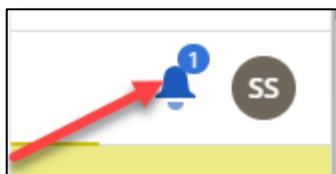

9. View can be Exported to CSV
   a. Select the Export Arrows on the top left section of the Staff view

   b. 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

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

   d. Click on the CSV Export Complete – To Do - All To Dos View