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Migrating to Modern UX

Your Guides:

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ValueOps

Clarity
Rally Software

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Agenda

- Introduction
- Why?
- Migration Strategies
- Planning the Pilot
- Tactical Checklist

Part I: Introduction

<Descriptor>



Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

Part II: Why?



What is (and isn't) the Modern UX?

There are often misconceptions about Clarity's Modern UX (User Experience), especially for companies that have lived in the Classic UX for years.

It is...

- The primary focus of Broadcom's R&D investment and has been for the last few years.
- Available side-by-side with Classic. Except for Timesheets, users can toggle between the two experiences. Noting support considerations, of course.

It is not...

- A replacement for Classic. Broadcom approached development of the Modern UX as a PPM innovation and did not port all capabilities like-for-like.
- Only a "look and feel" change. The way in which users interact with the application as well as the core functionality has been reimagined.
- New. The Modern UX was originally introduced in 15.1. It has, however, evolved significantly through the latest release 16.0.3.

What we're seeing...

- Given the three-month release cycle, most companies are not aware of the latest capabilities or the fact that the Modern UX can be turned-on in stages.
- The perception of oversized change management and loss of functionality is paralyzing.
- Companies that are newer to Clarity have been able to move over more quickly, but most organizations still find themselves needing elements of Classic UX.
- Larger companies with heavy configuration have been waiting to move to the Modern UX until certain features they need are migrated.



Tips!

Attend Rego's "What's New in 16.X" webinars to familiarize your organization with the latest release.

Looking for a full review of the Modern UX?
Attend Broadcom's "Modern UX End-to-End" demo series. Last Tuesday of every month!
Email clarity@broadcom.com.

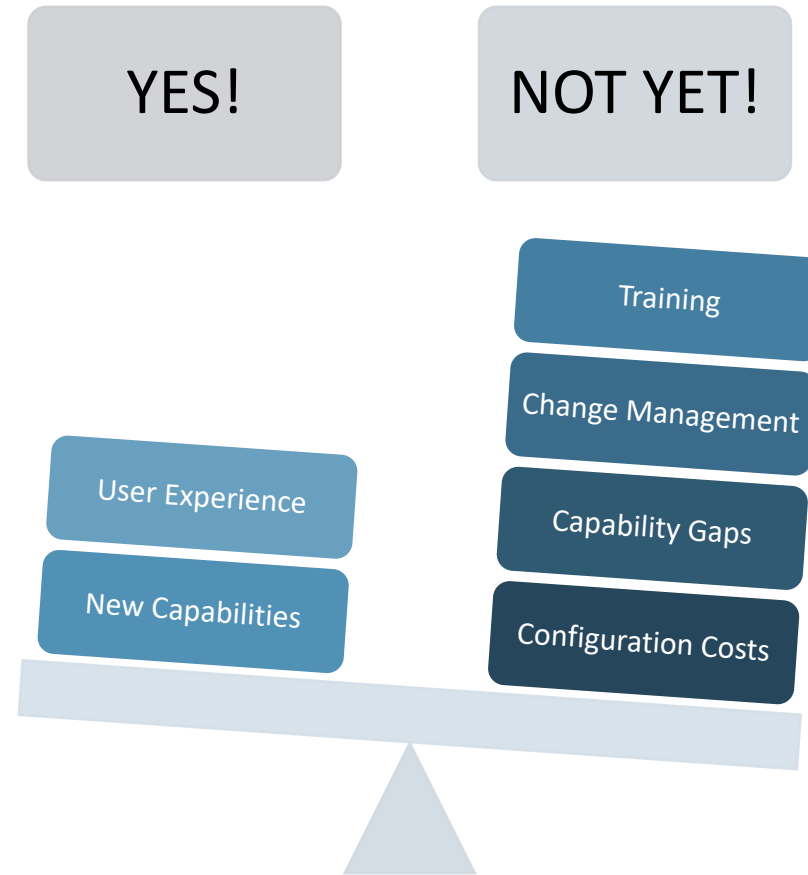
Make the Case

Remember, all future innovation will be in the Modern UX.

- Common Grid, Board, and Timeline Views
 - Acknowledge the gaps in Classic:
 - Inability to share views
 - Difficult to configure columns/filters
 - Copy/Paste
- Blueprints
 - Utilize Blueprints for phases, types of projects, areas of the organization
 - Sample:
 - IT may need the Staff, Risks, Issues and Change modules
 - R&D may only need Tasks and Status
- Timesheet Users
 - Exportable Timesheet View
 - Mobile Timesheets
- Project Manager Flexibility
 - Several ways to view Tasks tailored to the style of project methodology
 - Customize Picklists per project w/o Admin
 - Conversations for quick chats with team members
 - To Dos to capture items that don't necessarily equate to a task
- Roadmaps and Hierarchies
 - Visualize investments in Timeline or Hierarchical view
 - Summarize Financial, Status and other project data into a single view from various investments
 - Combine many types of investments in both modules
 - Set Targets, provide roll-ups, and quickly adjust views to pivot slicing the data

Open Mic

- Why haven't you moved yet to the Modern UX?



Part III: Migration Strategies



Crawl-Walk-Run Approach to the Modern UX

- Our most common UX consulting engagement is to develop a “roadmap” for the best path from Clarity Classic to 100% Modern UX.
- Not all customers are able to go 100% Modern UX – in some cases process changes are needed, in other cases a concerted focus on change management – but they want a plan.
- You do not have to adopt the Modern UX fully to start taking advantage its great features.



Migration Tactics

• Big Bang

- Shift all modules to the modern UX at once
- Large training/change management impact
- Simplified approach with one UI
- Ability to coordinate with a rebranding
- Try to migrate existing modules and introduce something new (e.g., Roadmaps) so they don't feel like it's a lift-and-shift
- Try not to bundle with large organization changes. The change management is too much.

• Incremental

- Phased approach by role, module, or group (e.g., move all PMs vs move R&D PMs)
- Controlled training/change management
- Exist in two UIs
- Ability to control and refine for a full deployment

Migration Paths

At this point, most show-stopping gaps have been addressed and you can begin a migration plan. Start by asking the following questions:

Role or Team Based Migration

- Can an entire user group migrate to the Modern UX?
- Is there a division within your organization that uses less functionality in Classic and the Modern UX fits well?
- Are all their functionality responsibilities available in the i.e. Modern UX?
- Is there a user group that needs a “refresh” of the tool?

Functionality Based Migration

- Can we utilize the Modern UX for some functionality while still remaining in Classic UX with minimal user disruption? (e.g., utilize Roadmapping for strategic planning)
- Is there buy-in for utilizing both Classic and the Modern UX?
- Can we utilize the Phoenix Classic skin or Modern UX channels to ease migration?

Build and follow the Modern UX Roadmap based on the selected migration path or a combination of both to meet your company’s strategic business needs.



Tip!

If you are finding that your organization is heavily configured, complete a functionality assessment to optimize configuration and migration toward OOTB modules before focusing on the Modern UX.

Part IV: Planning the Pilot



Planning the Pilot

Define Pilot Logistics

- What Modern UX modules are included in the pilot?
- What resources / teams are included in the pilot?
- What kind of training will be provided?
- Cadence for feedback sessions?
- Mechanism for documenting and tracking feedback?
- Duration of pilot and go/no-go criteria?

Identify Minimum Set of Configurations

- What object attributes, subpages, and subobjects should be presented in the Modern UX?
- Use this exercise as an opportunity to rationalize fields and only expose those elements that are still being used or providing value.

Foundational Configurations

API-Enable Attributes



- Any attribute that is to be exposed in the Modern UX must have an API ID.
- Typically, this is a great opportunity to do some field rationalization.

API-Enable Object and Sub-Objects



- Custom objects that are to be exposed in the Modern UX must be API-enabled. Individual attributes must then also be given an API ID.
- This includes sub-objects which would appear as Modules (i.e., tabs) in the related Blueprint.

Create Blueprint(s)



- Blueprints provide a canvas on which to design the Modern UX property screens.
- Included here is the configuration of the Modules and Business Rules that drive view and edit rights to sections and attributes.
- Blueprints might also be configured to include Channels that present external sites or access to Classic capabilities not ported to the Modern UX.

Remediate Processes and Notifications



- Since the Modern UX auto-commits changes, process start conditions often need to be redesigned to only fire when appropriate.
- Links included in stock notifications direct the user to Classic and should be replaced by links to the Modern UX equivalent screen.
- Custom, script-based notifications and action items need to be remediated to direct the user to the right Modern UX screen.

Establish Standard Views



- Similar to defining a default portlet or studio view in Classic, all Modern UX views should be configured with an enterprise standard default.
- Includes configuration of grid views, Board views, timeline views, filters, widgets, and flyouts.

Configure User Security

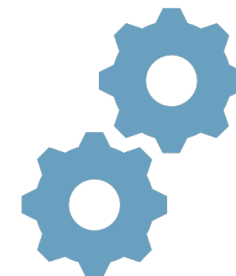


- While existing data rights can be left unchanged, security groups need to be augmented with access to the new capabilities in Modern UX.
- This can also include SSO modifications that take the user to the Modern UX landing page rather than Classic Home.

Part V: Tactical Checklist

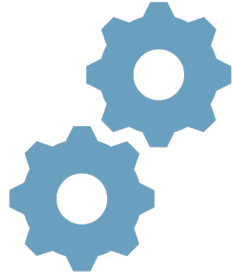


Modern UX Configurations (1 of 5)



ID	Activity	Description
C1.1	Enable attributes that are to be exposed in the Modern UX with an API ID.	<ul style="list-style-type: none">API ID should follow the convention: 'c_<attribute id>'. This includes OBS attributes as well. This may require an update to previously (15.6) set API IDs.Once set, these should not be modified as it could leave orphaned fields on a blueprint.
C1.2	Update attribute names to align with expected field label (15.9.2 and earlier).	<ul style="list-style-type: none">The 15.9.2 and prior releases use the Attribute-level field labels, which may or may not match the View-level field labels from Classic.In 15.9.3 and later, you may adjust field names in the modern UX for most objects.
C1.3	Add color mapping to lookups.	<ul style="list-style-type: none">In cases where a lookup may be used in a Modern UX "Color By" view, color mapping needs to be defined in Studio.
C2.0	Enable investment subobjects for display in the Modern UX.	<ul style="list-style-type: none">Set API Enabled = Yes for all investment subobjects that are to be presented as modules (i.e., tabs) in the Modern UX.Subobjects to subobjects likely require a Channel.

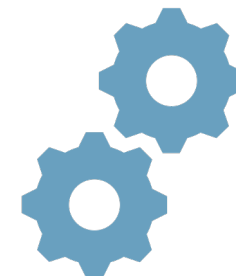
Modern UX Configurations (2 of 5)



ID	Activity	Description
C3.1	Establish one or more Blueprints.	<ul style="list-style-type: none">▪ Create and configure one or more Blueprints.▪ Start with a copy of the standard Project Blueprint.
C3.2	Define field-level security for projects and ideas.	
C3.3	Define and implement channels and pages.	<ul style="list-style-type: none">▪ Up to 15 channels can be established for a given Blueprint.▪ The following parameters are available:<ul style="list-style-type: none">○ Project Code: <code>\${_code}</code>○ Project ID: <code>\${_internalID}</code>○ Project Manager: <code>\${_manager}</code>○ User Name: <code>\${_userName}</code>○ Project Name: <code>\${_name}</code>▪ Channel page tags for Phoenix UI :<ul style="list-style-type: none">○ Hide the extra menu: <code>&puiFullscreen=on</code>○ Hide the project specific menu: <code>&puiHidePPMTabs=on</code>▪ Use dynamic URL: <code>./.././.././../niku/nu</code>
C4.0	Configure Page/Menu links	Can be configured for internal or external non-investment-specific pages or sites.

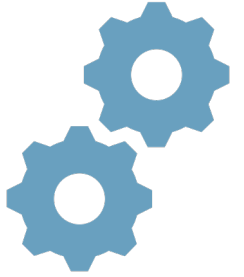
Modern UX Configurations (3 of 5)

ID	Activity	Description
C5.0	Associate existing templates with a Blueprint.	<ul style="list-style-type: none">As appropriate, leverage To Dos to solve schedule granularity challenges.If you have several templates, recommend that you update the templates and assign each one a different banner color so they're easily distinguished in the tile view.
C6.0	Configure background settings to support Staffing module and investment data.	<ul style="list-style-type: none">As necessary, use the OOTB job to convert mixed bookings.Schedule the jobs:<ul style="list-style-type: none">Populate Management Resource CurvesTime Slicing SyncPost Actuals to InvestmentEnsure that Booking Status and Request Status on the Team object have default values.



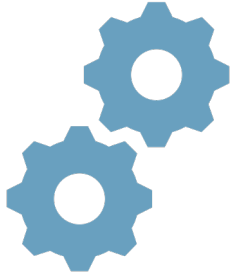
Modern UX Configurations (4 of 5)

ID	Activity	Description
C7.0	Evaluate Actions Menus (15.9.2 and earlier)	<ul style="list-style-type: none">▪ The Actions Menu is not accessible in the Modern UX, but you can use attribute changes as a trigger.▪ Avoid using Booleans for this purpose – they are too easy to click or touch on a touch screen.▪ Try using a lookup with values like “Action: [describe action here]”.▪ Actions Menu is available in 16.0.3 for most objects.
C8.0	NPIOs	<ul style="list-style-type: none">▪ Products, Assets, Portfolios, Applications, Other Work and Programs are not supported or not fully supported in the Modern UX.▪ Other Work is available in Staffing and on Timesheets▪ Consider replacing Products, Assets or Applications with Custom Investments.



Modern UX Configurations (5 of 5)

ID	Activity	Description
C9.0	Configure and save default list and flyout views.	<ul style="list-style-type: none">▪ Add 'View management – Administrator' access right to administrator groups.▪ Includes all list views and flyouts for objects and subobjects.▪ Don't forget about widgets to give some extra information.
C10.0	Create a Modern UX Pilot security group.	Group should include individual global right to the modules of interest in the Modern UX.
C11.0	Introduce Modern UX link from Classic.	Optionally, create a menu link or portlet w/ button that allows users to navigate to the Modern UX from Classic. User with appropriate permissions can also access directly via the URL.
C12.0	Validate that users are no longer using IE to access Clarity.	IE is no longer supported in the Modern UX. Users should move to Chrome, Firefox, Safari or Edge.



Important:

Many migrations are coupled with an upgrade to the latest version. Even though they may be deployed together, be sure to treat these as two separate workstreams during testing / impact analysis, especially if you're making a multi-version jump.

Summary



- Educate yourself on the latest capabilities of the Modern UX. The perception of gaps from Classic may not longer be valid.
- Stay current with your version to take advantage of Broadcom's accelerated release schedule. GCP migration helps!



- Develop a roadmap based on introspective evaluation of As Is and To Be states.
- Remember that it doesn't need to be a big bang, all-or-nothing approach.



- Look for quick wins with Phoenix, Timesheets, Roadmaps, Hierarchies.
- Pilot with a group of PMs, RMs, Team Members to collect real-world feedback.

Questions?



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