



regoUniversity

NASHVILLE • 2022

Modern UX Advanced Administration

Your Guides:
Robert Newell and Jair Flores

Introductions

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



Agenda

- Blueprints
 - Pages
 - Modules - Channels
 - Rules
 - Field Level Security
 - Actions

Pages

Dashboards via the Modern UX



Create a Page

- In the Modern UX there is a new option to display portlet dashboards called Pages.
 - Navigate to Modern UX → Pages
 - Select on the + icon to create a new row
 - Populate a Name and Id with relevant information.
 - Example: Portfolio List
 - Navigate to Administration → Blueprints
 - Filter Type → Page
 - Copy Standard Page
 - Edit Copied version to relevant name
 - Navigate back to Pages
 - Select new blueprint and add Channel
 - Input new Name and Address for Channel.
 - Example:
 claritytest.com/niku/nu#action:pfm.portfolioList&puiFull
 screen=on

The image shows a user interface for 'regiconsulting'. On the right, a dark navigation menu lists: Home, Project Tiles, Projects, Ideas, Investments, and Pages. The 'Pages' item is highlighted with a blue arrow pointing to it. Below the menu, a screenshot of the 'Portfolios' page is shown. The page has a header with 'regiconsulting', 'Page', and 'Portfolios PF1234'. Below the header is a table with columns for 'Portfolio', 'Managers', and 'Goal'. The table contains several rows of data with various icons and colors (green, yellow, red) indicating status. A blue silhouette of a person is pointing at the 'Pages' menu item, and three smaller blue silhouettes of people are shown below the main figure.

Portfolio	Managers	Goal
AA - July Training	Admin, RegoAmerica, Captain;Rinella, Jenn	00
AA - July Training As Of OCT-31-2016	Admin, RegoAmerica, Captain;Rinella, Jenn	00
AA-jfmJulyTraining	America, Captain;User 01, Test	00
American Civil War	Zemont, Grant	15
Annual Budget_KHL As Of APR-30-2019	Aeson, Jason;Montanez, Carlos	19
Annual Budget_KHL Webinar	Lifsey, Karen	17
Annual Planning - All	User 06, Generic	17
Annual Planning - Technology	User 06, Generic	17
Annual Planning- Business Support	User 06, Generic	17
Automate Processes	Thompson, Peter	16
AT Prioritization Test Pfm	Rinella, lenn	15

Working with Pages

Administrators can define a collection of pages and canvas to include table widgets in Clarity.

A collection of pages provides a single place to access desired Clarity or external application pages without being inside an object instance. This allows you to leverage the Channel functionality outside the object instance. Ensure that you have the Page – Navigate access right to access this page.

The image shows two screenshots from the Clarity application. The top screenshot displays the 'Pages' management interface, and the bottom screenshot shows a preview of a 'BI Dashboard' page.

Pages Management Interface:

- Header: clarity Pages
- Search: Search...
- View: Default
- Buttons: Select All, Deselect All, Group By, Save
- Table:

Starr...	*Name	Security OBS - Pages
<input type="checkbox"/>	Administration Dashboard	All/General
<input checked="" type="checkbox"/>	BI Dashboard	All/Reporting
<input type="checkbox"/>	Financial Transaction	All/Financials
<input type="checkbox"/>	Personal Page	All

BI Dashboard Preview:

- Header: clarity BI Dashboard P-002
- Navigation: Dashboard, Product Hiera..., Product Metrics, Performance ...
- Overall Attainment: 47.50%
- % Completion of OKRs: 22.50%
- OKR Dashboard: Goal Progress (Donut chart), OKR Breakdown (Table)
- Attainment by Product: Bar chart showing 60%, 20%, 70%, and 40% for Credit Cards, Home Lending, Loan Applications, and Monetary Transfers.

Pages - Key Points

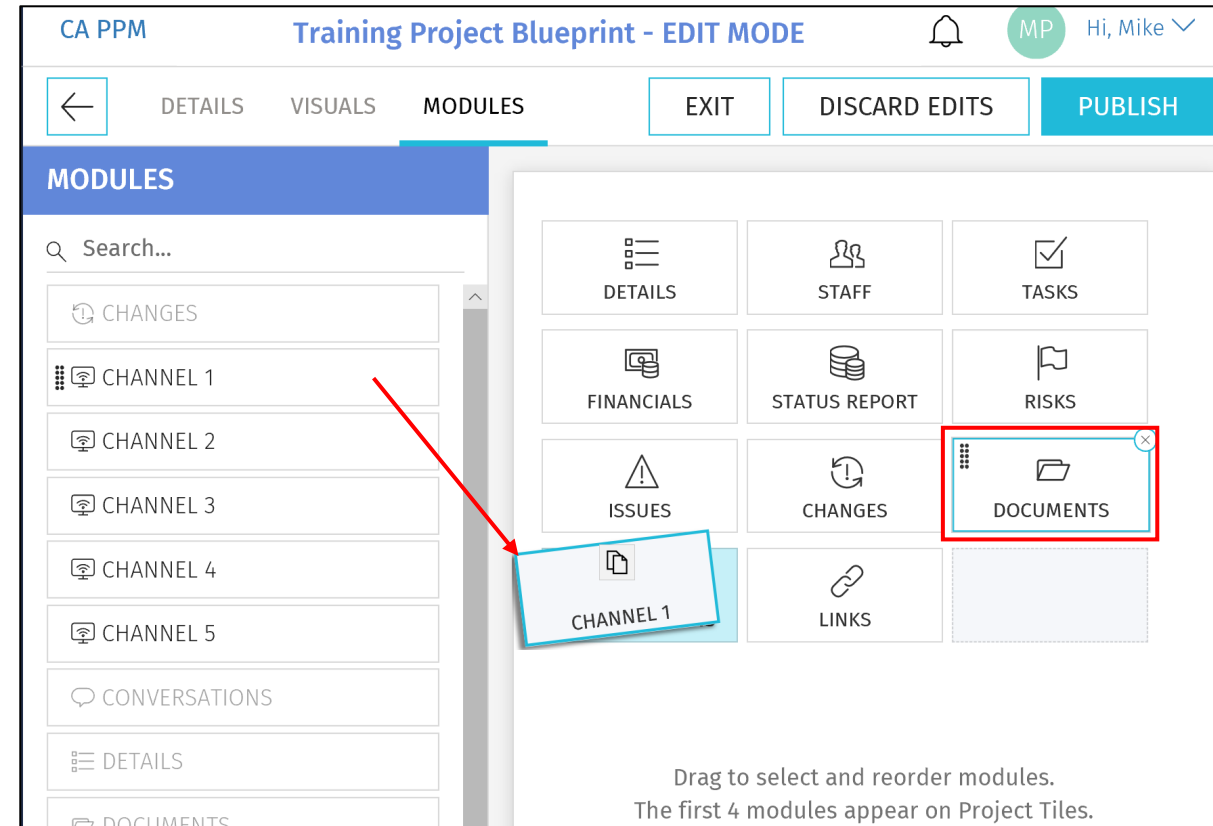
- Every page is associated with a blueprint.
- Classic PPM includes the new studio object called “Page”.
 - Includes Instance, Global, and OBS access rights
- Attributes in Page can be secured using Field Level Security.
- Pages cannot be seen in Classic PPM.
- You cannot define sub-objects for the Page object
- Channels within a blueprint are limited to the same governor limit of 15.
- In Classic PPM the “Page” object has the event enable flag. This is standard object configuration, but processes will **not** be supported with the Page object.
- When setting security you will see two “Page” objects listed. One refers to the Classic PPM portlet page, and the other to the Clarity page. The description for the Clarity page will list “new user experience”.

Modules - Channels



Modules

- Once inside of a Project, Modules are displayed across the top
- The first 4 Modules will also be displayed on the Project Tile for direct navigation to that Module
- There are 12 core Modules which are not configurable and provide project functionality like financials, team, task, etc.
- In addition to the core Modules, there are configurable Channels and the ability to add custom sub-objects



Modules – Channels

- Channels are configurable Modules that can be directed to other internal PPM locations, external applications, or external URLs
- Users can stay directly in their Project and get the additional pertinent information
- Configuration
 - Channel Name – The name displayed to the user
 - Channel URL – The URL where the channel will navigate
 - Referrer URLs – These are additional URLs need for navigation like authentication

The screenshot displays the CA PPM interface for the 'ACME Project'. The top navigation bar includes 'STATUS', 'STATUS REPORT', 'SHAREPOINT', 'CLASSIC PPM', 'SMARTSHEET', and 'POWERBI REPO...'. The main content area shows a project plan with columns for Task Name, Duration, Start, Finish, % Complete, Staffing Size, Status, and Assignee. The plan is organized into phases: Initiation, Development, Testing, and Launch.

Overlaid on the project plan is a 'Training Project Blueprint - EDIT MODE' window. This window has tabs for 'DETAILS', 'VISUALS', and 'MODULES'. The 'MODULES' tab is active, showing a list of modules including 'CHANGES', 'CHANNEL 1' through 'CHANNEL 5', 'CONVERSATIONS', 'DETAILS', 'DOCUMENTS', 'FINANCIALS', and 'ISSUES'. A 'Configure - Smartsheet' modal is open, allowing users to set the 'CHANNEL NAME' (e.g., 'Smartsheet'), 'CHANNEL URL' (e.g., 'https://app.smartsheet.com/b/publish?EQBCT=xxxxxxxxxxxx'), and 'REFERRER URLS' (comma-separated).

Task Name	Duration	Start	Finish	% Complete	Staffing Size	Status	Assignee
- Initiation	14d	12/28/15	01/14/16	100%			
Detailed Requirer	6d	12/28/15	01/04/16	100%	4 people	Green	Mike
Hardware Requir	5d	01/05/16	01/11/16	100%	4 people	Blue	Ed
Final Resource P	2d	01/12/16	01/13/16	100%	4 people	Yellow	Ba
Staffing	1d	01/14/16	01/14/16	100%	4 people	Yellow	Ed
- Development							
Technical Requir							
Database Develo							
API developm							
UI Client develpr							
- Testing							
Operations							
Hardware procure							
Hardware configu							
System Testing							
- Launch							
Deployment Test							
Perf and Scalabili							

Modules – Custom Sub-Objects

- Custom sub-objects of Projects, Ideas or Custom Investments as a Module in the New User Experience
- Check the “API Enabled” checkbox on the existing custom object or a new custom object
 - Once this is checked and saved, it can’t be undone
- After saving, an API Attribute ID will be automatically created for the object and it will be available as a Module

The screenshot displays the configuration interface for a custom sub-object. The top section, titled 'Subobject', shows the 'Master Object' set to 'Project'. Below this, several checkboxes are visible: 'Event Enabled', 'Include in the Data Warehouse', 'Copy Enabled', 'Export Enabled', 'View All Enabled', and 'API Enabled'. The 'API Enabled' checkbox is checked and highlighted with a red box, with a note below it stating '(Once the value is enabled, it cannot be disabled.)'. Below the checkboxes are 'Save' and 'Save And Return' buttons.

The bottom section, titled 'Object: Test Sub Object - Properties', shows the 'Object Name' as 'Test Sub Object', 'Object ID' as 'test_sub_prj_obj', and 'API Attribute ID' as 'custTestSubPrjObjs'. The 'API Attribute ID' field is also highlighted with a red box. Below this is the 'Content Source' section with a 'Description' field.

A secondary window in the bottom right shows a grid of modules. The 'TEST SUB OBJECT' module is highlighted with a red box. The grid includes modules such as DETAILS, STAFF, TASKS, FINANCIALS, STATUS REPORT, RISKS, ISSUES, CHANGES, DOCUMENTS, LINKS, CONVERSATIONS, and SMARTSHEET.

Channel Frame Parameters

- Simplify and enhance user experience by adding frame parameters to increase size and reduce noise
 - `&puiFullscreen=on`
 - `&puiHidePPMTabs=on`
- EXAMPLE

`yourserver.../niku/nu#action:projmgr.projectDashboard&id=${_internalId}&puiFullscreen=on&puiHidePPMTabs=on`

Channel Context Sensitive Parameters

- Use Context Sensitive Parameters to direct user to instance specific classic view
 - Project Code: `${code}`
 - Project ID: `${_internalId}`
 - Project Manager: `${manager}`
 - User Name: `${userName}`
 - Project Name: `${name}`

Example:

`yourserver.../niku/nu#action:projmgr.projectDashboard&id=${_internalId}`

Jaspersoft Example:

`https://clarityserver.ca.com/reportservice/flow.html?_flowId=viewReportFlow&reportUnit=%2Fca_ppm%2Freports%2Fproject_management%2FCSK_PRJ_ProjectStatusSummary&standAlone=true&ParentFolderUri=/ca_ppm/reports/project_management&populateProject=1&projectKey_1=${internalID}`

Relative Paths

- Use relative paths for classic links to prevent data server specific errors:

Instead of: `http://my.clarity.broadcom.com/niku.nu`

Use: `../../../../../niku/nu`

Configure - Dashboard

Channel Name *

Channel Url *

Canvas



Canvas Functionality

Canvas functionality provides the ability to include table-type widgets to view data across multiple sub-objects on a single page. These table widgets allow you to display a grid-like layout based on the selected sub-object.

Canvas are available starting v16.0.2

Canvas in edit mode

Count: Number of times this table widget is added to the canvas

Drag to add widgets to canvas

Save changes

Configure button to edit the canvas layout

Save canvas layout within views.

Tasks

Name *	Start *	Finish	Assigned To *	Status *
Aashram	May 1, 2019	D	Thompson, Peter	Open
Additional Develo...	Jul 15, 2021	J	Childers, Valerie	Open
Assessment	Aug 2, 2021	A	Thompson, Peter	Open
Asset Mapping & C...	Aug 16, 2021	S	Morris, Tim	Open
			Childers, Valerie	Work in Progress

Overdue Tasks

Common Investment	Tasks
Name	Name *
XPL Translations	Plan Infrastructur
XPL Translations	Select Team
XPL Translations	Change Review Pr
XPL Translations	Develop

1-25 of 66

1-25 of 1221

1-25 of 57

Project Dashboard P-003

Properties Project Dashboard Late Milestones Personal Dashboard

Configure C

Search...

PK1022 Sponsor:

5 Reviewers

or Approval Required

Priority: High

Storage Implementation Code:

ected Approved With Conditions

View (Copy) Standard View Save Configure

Tasks

Open Pending Closed

Project Sponsor Approval Required

Following project requires sponsorship approval: Project: Email SAN Storage Implementation Code: PR1022 Sponsor: Hudson, Barb Strategy: Innovation at Scale

5 Reviewers

Approved Rejected Approved With Conditions

Configure Canvas to add Table Widgets

You can configure a Canvas, which is defined in Pages Blueprint, to include table-type widgets to view data across multiple sub-objects on a single page. These table widgets allow you to display a grid-like layout based on the selected sub-object.

By default, Canvas will be blank and needs to be configured to add widgets. Using the Canvas layout, you can:

- Add widgets for the following sub-objects in the Canvas layout:
 - Tasks
 - Risk
 - Issues
 - Changes
- Modify the canvas by dragging the available widget or field to the canvas. The canvas will display grey shading on the area where the selected widget/field will be dropped.
- Change the Widgets layout at any time, when in configure mode, and save it as part of the saved view.
- Remove widgets from the canvas.
- Resize widgets in the canvas.

Rules Engine

Rules Engine

- In the Modern UX there is now the option to create logic for hiding certain modules or sections based off attribute values.
- Easy way to create a flexible and dynamic user experience using views.
 - Example: Demand Management process
 - Navigate to Modern UX → Administration
 - Select on the Blueprints tile
 - Search for the blueprint you want to create logic on
 - Select Edit
 - Navigate to the Rules tab
 - Select New Rule

The screenshot displays the 'rego consulting' interface in 'EDIT MODE' for a blueprint named 'Blueprint Copy Test'. The 'Rules' tab is active, showing a table with columns for Rule Name, Status, Description, Last Updated By, and Last Update. A 'New Rule' dialog box is open, allowing the user to define a rule. The dialog includes fields for 'Rule Name *' (set to 'Approved') and 'Description' (set to 'Hide Tab on Approval'). Under the 'Conditions' section, a dropdown menu is open, showing a list of status options: Unapproved, Submitted for Approval, Approved (selected), Converted, Cancelled, Rejected, and Incomplete. The 'Actions' section has a dropdown menu set to 'Hide Sections'. The dialog also features 'Cancel' and 'Create' buttons at the bottom right.

Field Level Security



Attribute Security

- In the Modern UX there is now the option to secure attributes.
- All master objects can have their attributes secure
- Easy way to avoid users from seeing certain attributes in their configurable list view



- Navigate to Modern Ux → Administration
- Select on the Attributes tile
- Search for attribute name
- Access Edits and Access View is required.

Attribute ↑	Attribute ID	Object	Secure	Access Edit	Access View	Database Table	Database Column	Active
% Complete	percent_complete	Project	✓	[search...]		inv_projects	percent_complete	✓
% Complete Calculation Method	percent_calc_mode	Project				inv_projects	percent_calc_mode	✓
% Done By Agile Plan Estimate	agl_pctdon_pest	Project				odf_ca_project	agl_pctdon_pest	✓
% Done by Story Count	agl_pctdon_stc	Project				odf_ca_project	agl_pctdon_stc	✓
aatest Goal	rego_goal_code	Project				odf_ca_inv	rego_goal_code	✓
aatest Goal	rego_goal_code	Idea				odf_ca_inv	rego_goal_code	✓
aatest Goal	rego_goal_code	Release				odf_ca_inv	rego_goal_code	✓
aatest Goal	rego_goal_code	Enhance...				odf_ca_inv	rego_goal_code	✓
aatest Goal	rego_goal_code	Initiative				odf_ca_inv	rego_goal_code	✓

Blueprint Rights

- Add the appropriate Blueprint rights to the administration group in the Classic UI administration area.

Group: Admin Training - *Select Access Rights*

Access Right Description

<input type="checkbox"/>	Access Right ▲	Description
<input type="checkbox"/>	Blueprint - Create Copy	Allows user to create a copy of an existing Blueprint. Includes Blueprint - View - All right.
<input type="checkbox"/>	Blueprint - Delete - All	Allows user to delete all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
<input type="checkbox"/>	Blueprint - Edit - All	Allows user to edit all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
<input type="checkbox"/>	Blueprint - View - All	Allows user to view all Blueprints.

Displaying 1 - 4 of 4

Blueprints

You need to set the Blueprint on each of your templates in the Classic UI. You may need to add the Blueprint attribute to the screen.

Suggested: Add to the SETTINGS subpage of your projects.

Blueprint

Name

ID

	Name ▲	ID	Created Date
<input type="radio"/>	ADMIN TEST	BP1020	3/25/18
<input type="radio"/>	JRF test BluePrint	BP1015	1/1/18
<input type="radio"/>	Standard Project	BP1000	9/18/17
<input type="radio"/>	Standard Project - Custom	BP1002	9/21/17

Displaying 1 - 4 of 4

Project: Agile Time Tracking Template - Properties - Main - Settings Open in Scheduler Scenario: [--Select--] Actions

Setting

Execute Spawn Estimation Process

Department

Location

Blueprint

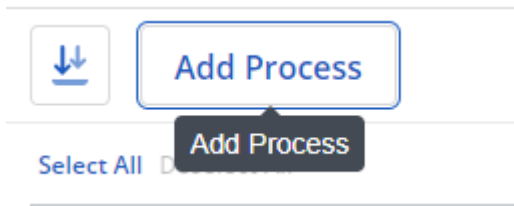
Template (Project must not have time entries or be financially enabled to be marked as a template.)

Actions



Actions

- Actions is the same functionality as in Classic PPM, that allow to start a process from the Properties tab



clarity [← Blueprint](#) GM Dashboard Extract (Default)

Properties Modules Rules **Actions**

↓

Group By

Order *	Name *	ID *	Enabled *	Process Name *
1	DATA: Populate GM Dashboard Extract	00000050		
2	DATA: Populate GM Dashboard Extract v2	00000051		DATA: Populate GM Dashboard Extract v2
3	DATA: Populate GM Dashboard Extract v3	00000052		DATA: Populate GM Dashboard Extract v3
4	DATA: Populate GM Dashboard Extract v4	00000053		DATA: Populate GM Dashboard Extract v4
5	DATA: Populate GM Dashboard Extract v5	00000054	✓	DATA: Populate GM Dashboard Extract v5

Saving Views and Filters



Saving Views and Filters (1)

- In the Classic UX, Administrators may save configurations to list views and filters, to ensure users see the right fields in view.
- That same functionality is not available in the Modern UX, but administrators can save a view, and have the end users choose that view, to allow them to see a predefined set of fields and filters.

- To save a view:

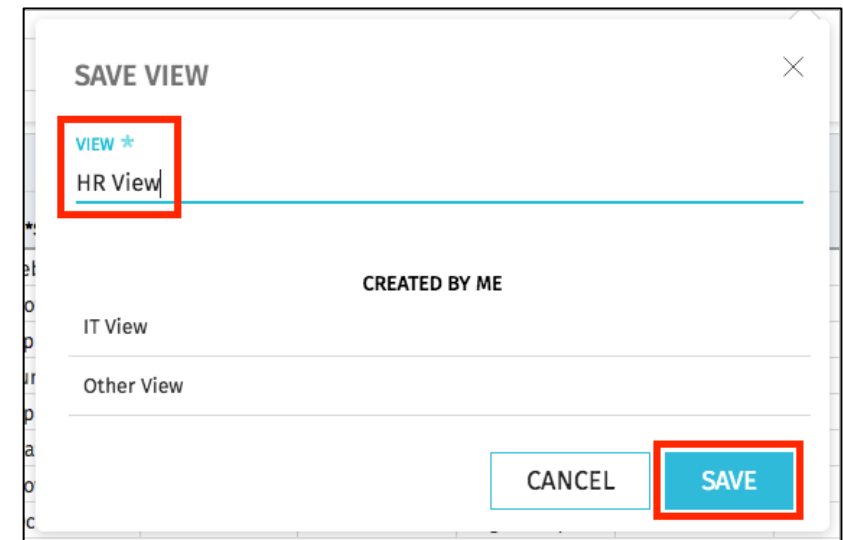
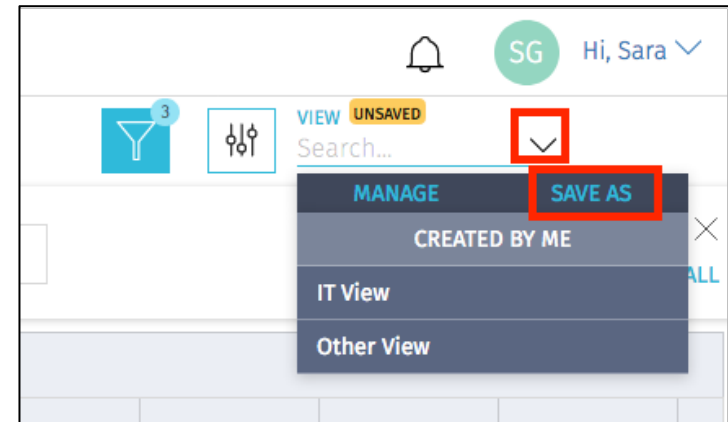
- Configure the filter and columns as you want the users to see them using the column panel and the filter selection.

The screenshot shows the Clarity PPM Projects interface. A red box highlights the filter configuration area, which includes an 'ADD FILTER' button, a dropdown menu for 'PROJECT MANAGEMENT OFFICE' (set to '--All--'), a dropdown menu for 'MANAGER' (set to '--All--'), and a text input field for 'NAME' with the value 'Contains ...'. Another red box highlights the column configuration area, which includes a 'Group By' dropdown and a table of columns. The columns are: *Name ↑, *ID, Manager, *Start, *Finish, Actuals, Blueprint, Project OBS, and ETC. A red arrow points from the filter configuration area to the 'NAME' input field, and another red arrow points from the 'Blueprint' column header to the 'Blueprint' column in the table.

*Name ↑	*ID	Manager	*Start	*Finish	Actuals	Blueprint	Project OBS	ETC
A Fantastic Project	PR000011	Joshi, Navdeep	Feb 02 2015	May 05 2019	0			248
ACME Project	PR000057	Administrator, PPM	Nov 27 2018	Mar 31 2022	0	Rego Blueprint		33
Act thru testing	PR000142	Moore, Taunya	Apr 29 2019	May 24 2019	0			136
After Upgrade Test Project	PR000164	Montanez, Carlos	Jun 18 2019	Jul 01 2019	0	Rego Blueprint	Dept 1	0
Agile Time Tracking Template & <>'	agl.TimeTracking	Administrator, PPM	Apr 16 2018	Apr 27 2018	0	Rego Blueprint		0
Allen Test	PR000149	D'souza, Leo	May 24 2019	May 24 2019	0			0
Anesthesia Delivery	PR000010	Joshi, Navdeep	Nov 18 2014	Sep 19 2024	127		Dept 3	146,560
Application Change Template	csk.appChange		Oct 24 2017	Nov 02 2017	0	Rego Blueprint		88
Application Monitoring	PR000037	Wuestel, Chris	Apr 30 2018	Mar 31 2022	575			4,426

Saving Views and Filters (2)

- To save a view (continued):
 - Once the filter and fields are added, use the *View* menu in the upper right corner to select **Save As** to Save the View.



Enter a name for the View, and click **Save**

Saving Views and Filters (3)

- Once the View is Saved, End Users may then search for and apply the view applicable to them.

Clarity PPM Projects

NEW FROM TEMPLATE

ADD FILTER

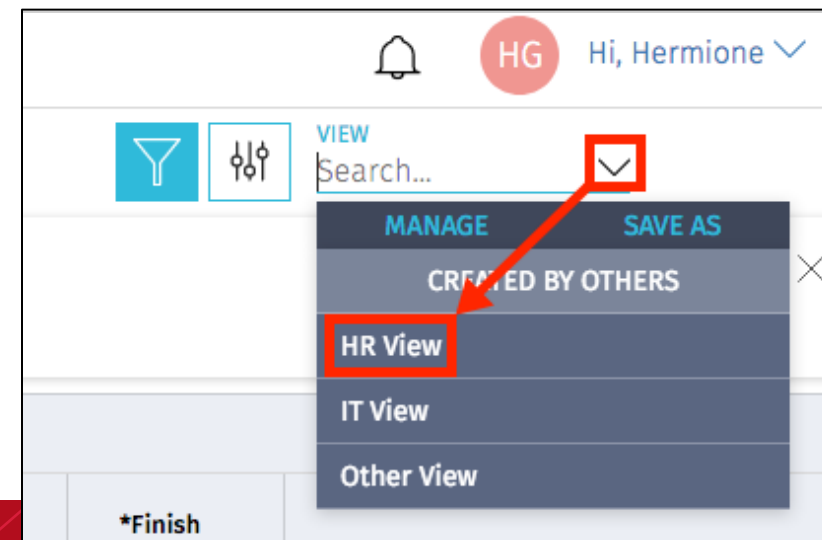
VIEW Search...

Group By

*Name ↑	*ID	Manager	*Start	*Finish
A Fantastic Pr...	PR000011	Joshi, Navdeep	Feb 02 2015	May 05 2019
ACME Project	PR000057	Administrator...	Nov 27 2018	Mar 31 2022
Act thru testing	PR000142	Moore, Taunya	Apr 29 2019	May 24 2019
After Upgrad...	PR000164	Montanez, Ca...	Jun 18 2019	Jul 01 2019
Agile Time Tr...	agLtimeTrack...	Administrator...	Apr 16 2018	Apr 27 2018
Allen Test	PR000149	D'souza, Leo	May 24 2019	May 24 2019

Original View, without desired fields and filters

- Instruct users to search for and apply the view using the View menu.



Saving Views and Filters (4)

- The new view will now be applied.

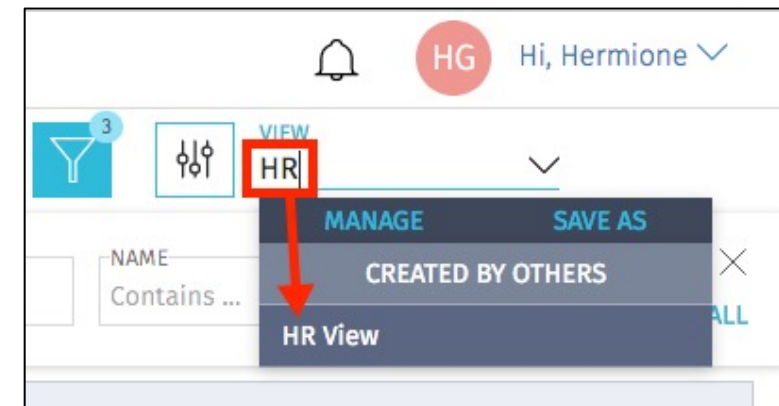
The screenshot shows the Clarity PPM interface for the 'Projects' section. The user is logged in as 'HG Hi, Hermione'. The interface includes a 'NEW FROM TEMPLATE' button, a filter icon with a '3' notification, and a 'VIEW' dropdown menu currently set to 'HR View'. Below these are filter fields for 'PROJECT MANAGEMENT OFFICE' (set to '--All--'), 'MANAGER' (set to '--All--'), and 'NAME' (set to 'Contains ...'). A 'REMOVE ALL' button is also present. The table below is grouped by 'Group By' and has a red box highlighting the header row. The table columns are: *Name (with a sort icon), *ID, Manager, *Start, *Finish, Actuals, and Blueprint. The table contains five rows of project data.

*Name ↑	*ID	Manager	*Start	*Finish	Actuals	Blueprint
A Fantastic Project	PR000011	Joshi, Navdeep	Feb 02 2015	May 05 2019	0	
ACME Project	PR000057	Administrator, PPM	Nov 27 2018	Mar 31 2022	0	Rego Blueprint
Act thru testing	PR000142	Moore, Taunya	Apr 29 2019	May 24 2019	0	
After Upgrade Test Project	PR000164	Montanez, Carlos	Jun 18 2019	Jul 01 2019	0	Rego Blueprint
Agile Time Tracking Template & <>'	agl.timeTracking	Administrator, PPM	Apr 16 2018	Apr 27 2018	0	Rego Blueprint

Saved View, with desired fields and filters

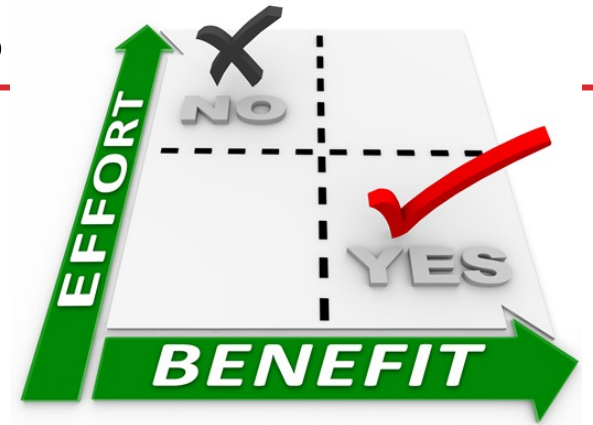
Notes on Saved Views

- There is no security right associated with saving views.
 - In 15.9.3 “Share” will be an option for users. Defaulted to false. This option will restrict users from seeing all views saved.
- This means that any end user can save a view that others will see. If everyone starts doing this, the list of views can become quite long.
- To limit scrolling through a long list of views, end users may use the Search functionality to search for and more easily locate the view you’re asking them to apply



Key Considerations and Leading Practices

- Blueprints are a powerful tool and provide the means for different groups to manage ideas, projects, custom investments, and custom objects in a tailored fashion. It is also available for Pages, Roadmaps, Hierarchies and Agreements.
- Only attributes that have an API Attribute ID are available in the blueprint's properties.
- Keep design simple and balance the number of blueprints with administration overhead.
- Leverage templates for end user creation of ideas, projects, and custom investments.
- If you delete a blueprint that is not the default, all templates and projects that are associated with the blueprint are then re-associated with the current default blueprint.
- Visuals - no need to add the Start and Finish dates as this is displayed on the Timeline of the card.
- After adding rules, you must publish and log in and logout to see the rule changes.
- First Four icons at the bottom of the tile view are pulled from the first four modules on the blueprint.
- If rule is based on a field value change need to refresh screen or browser to view the changes in v16.0.2. Broadcom working on an automatic refresh



Questions?



Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

www.regouniversity.com