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Modern UX Advanced Administration

Your Guides:

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Introductions

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

Agenda

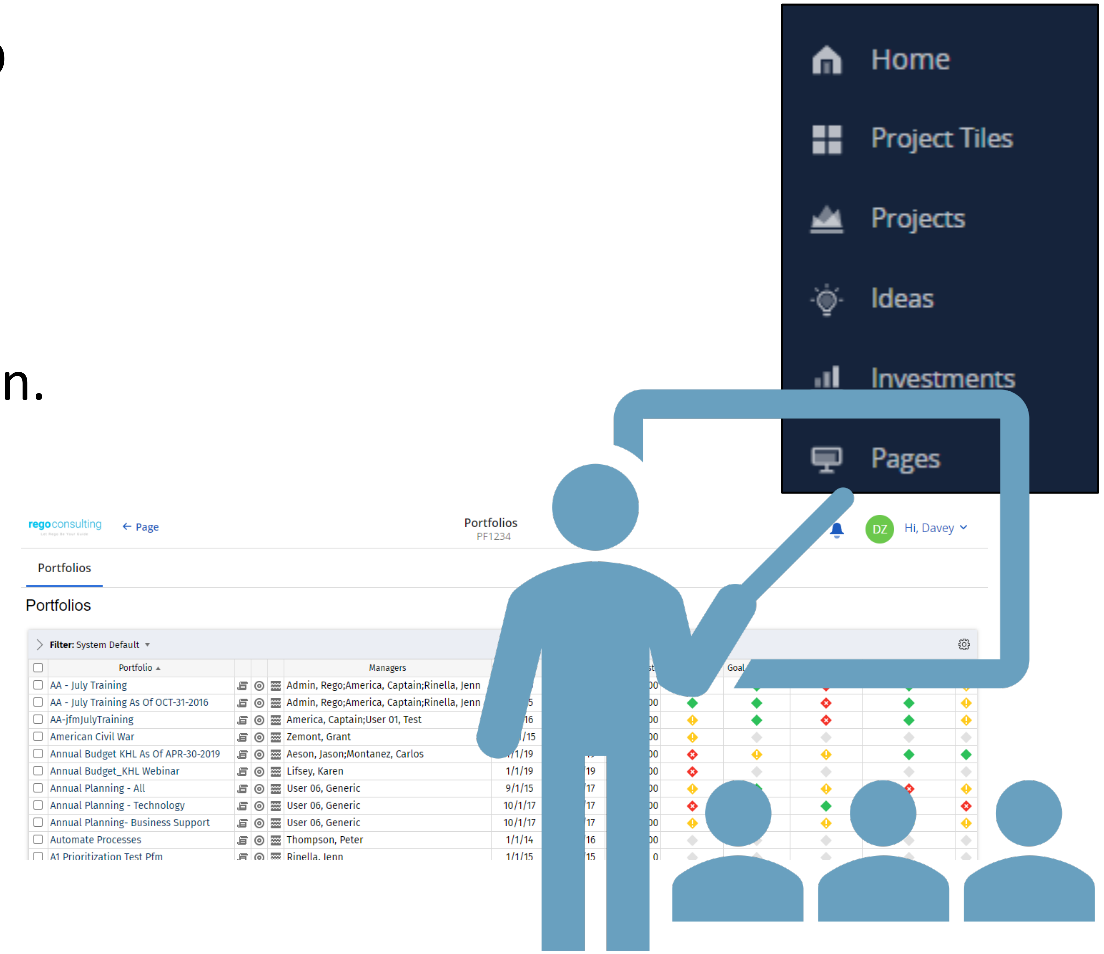
- Blueprints
    - Pages
    - Modules - Channels
    - Rules
    - Field Level Security
    - Actions

Pages

Dashboards via the Modern UX

Create a Page

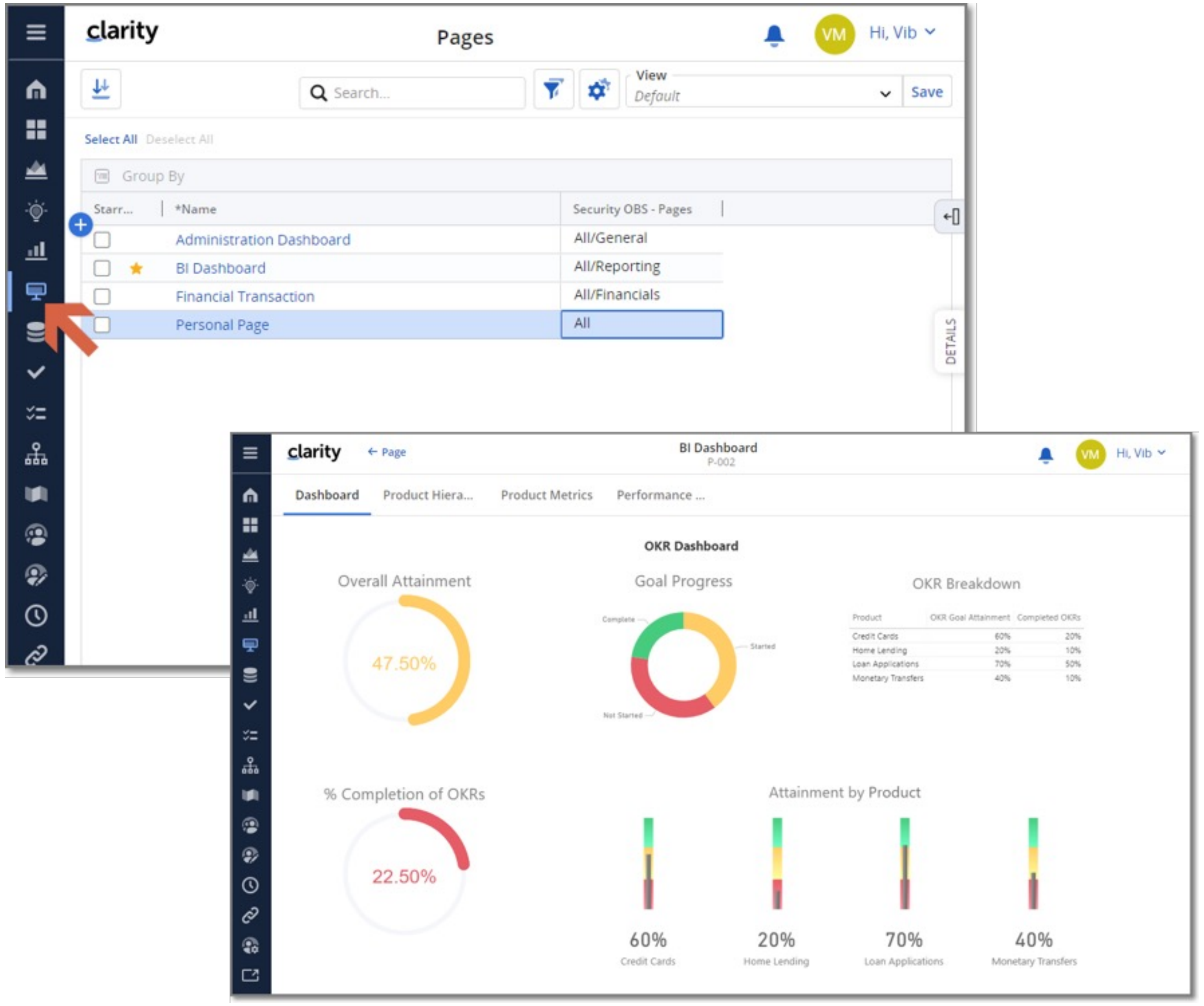
- In the Modern UX there is a new option to display portlet dashboards called Pages.
  - Navigate to Modern UX → Pages
  - Select on the + icon to create a new row
  - Populate a Name and Id with relevant information.
    - Example: Portfolio List
  - Navigate to Administration → Blueprints
  - Filter 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&puiFullscreen=on



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.



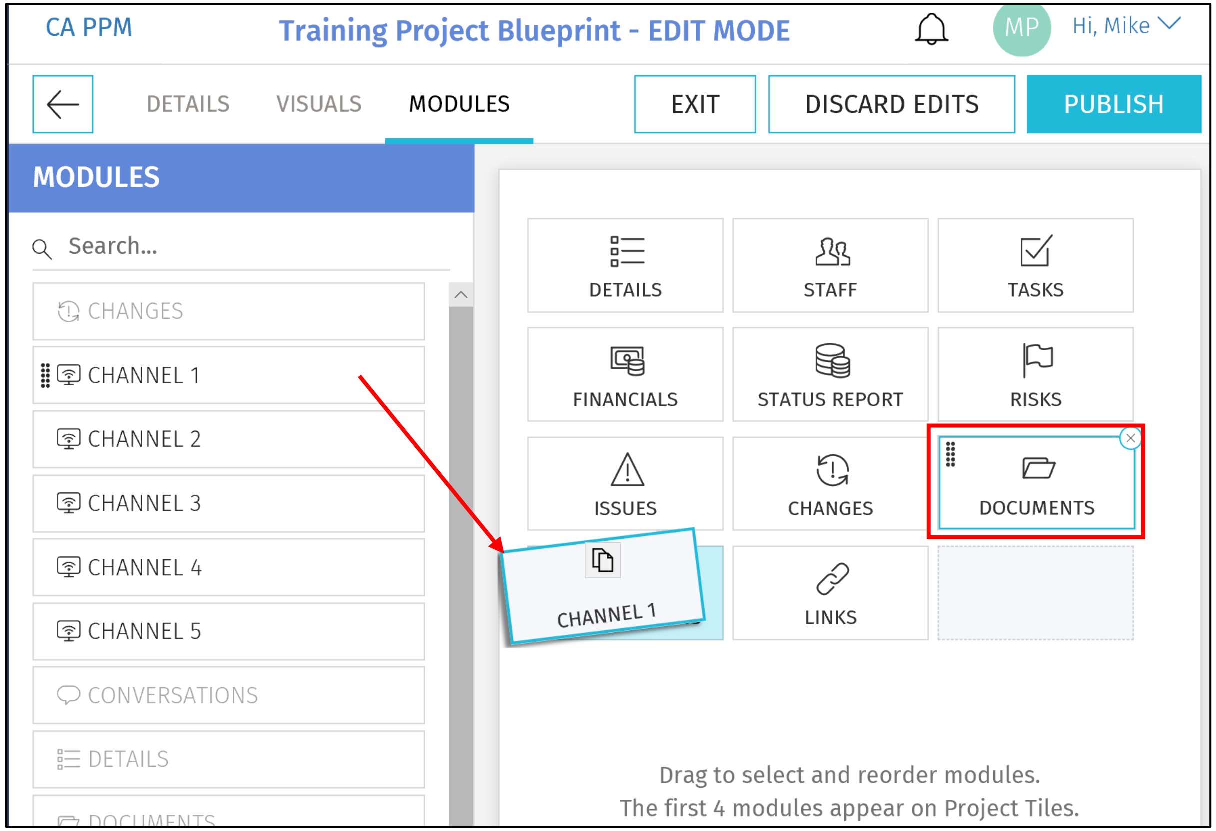
Pages - Key Points

- 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

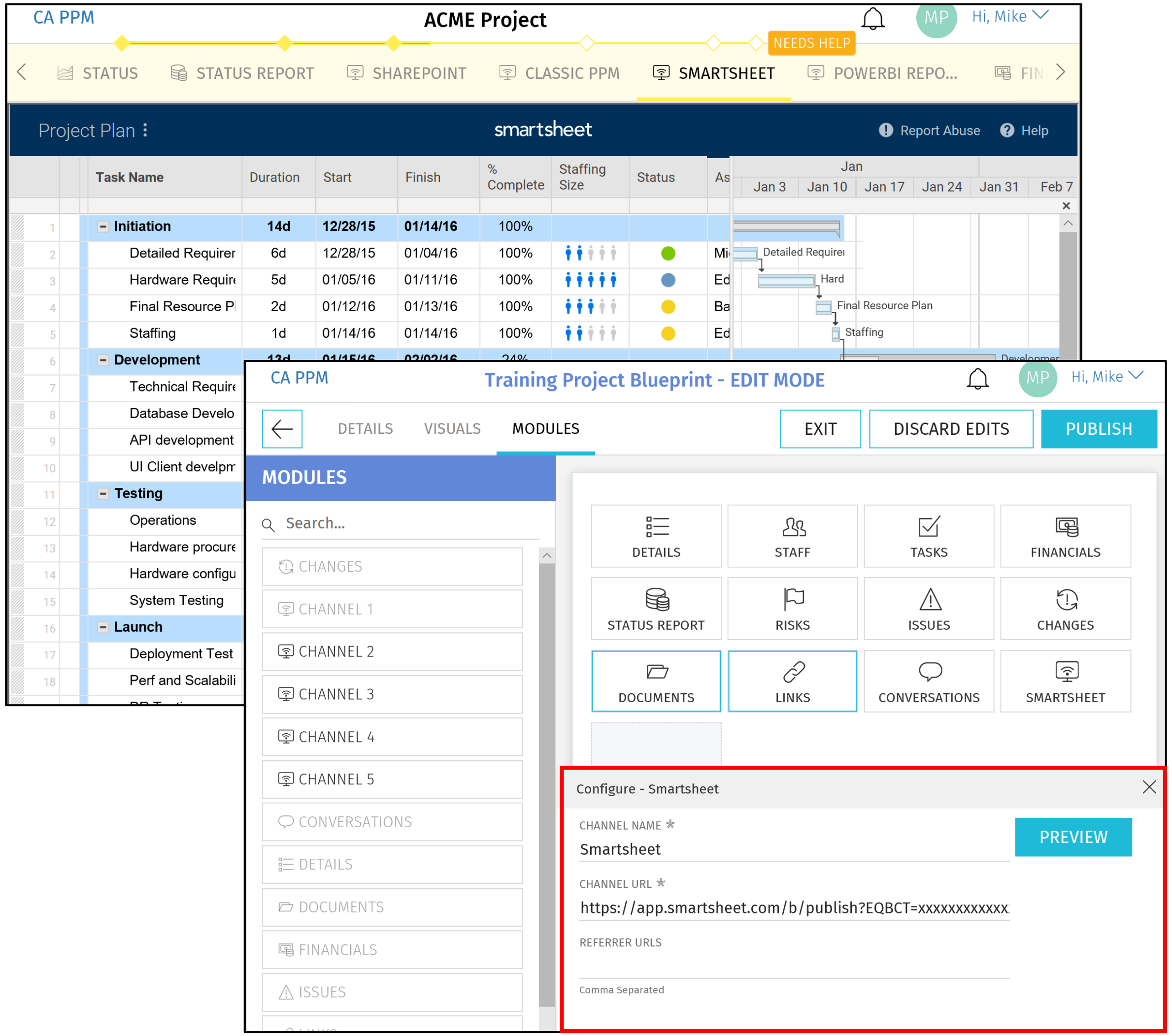
Modules

- 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



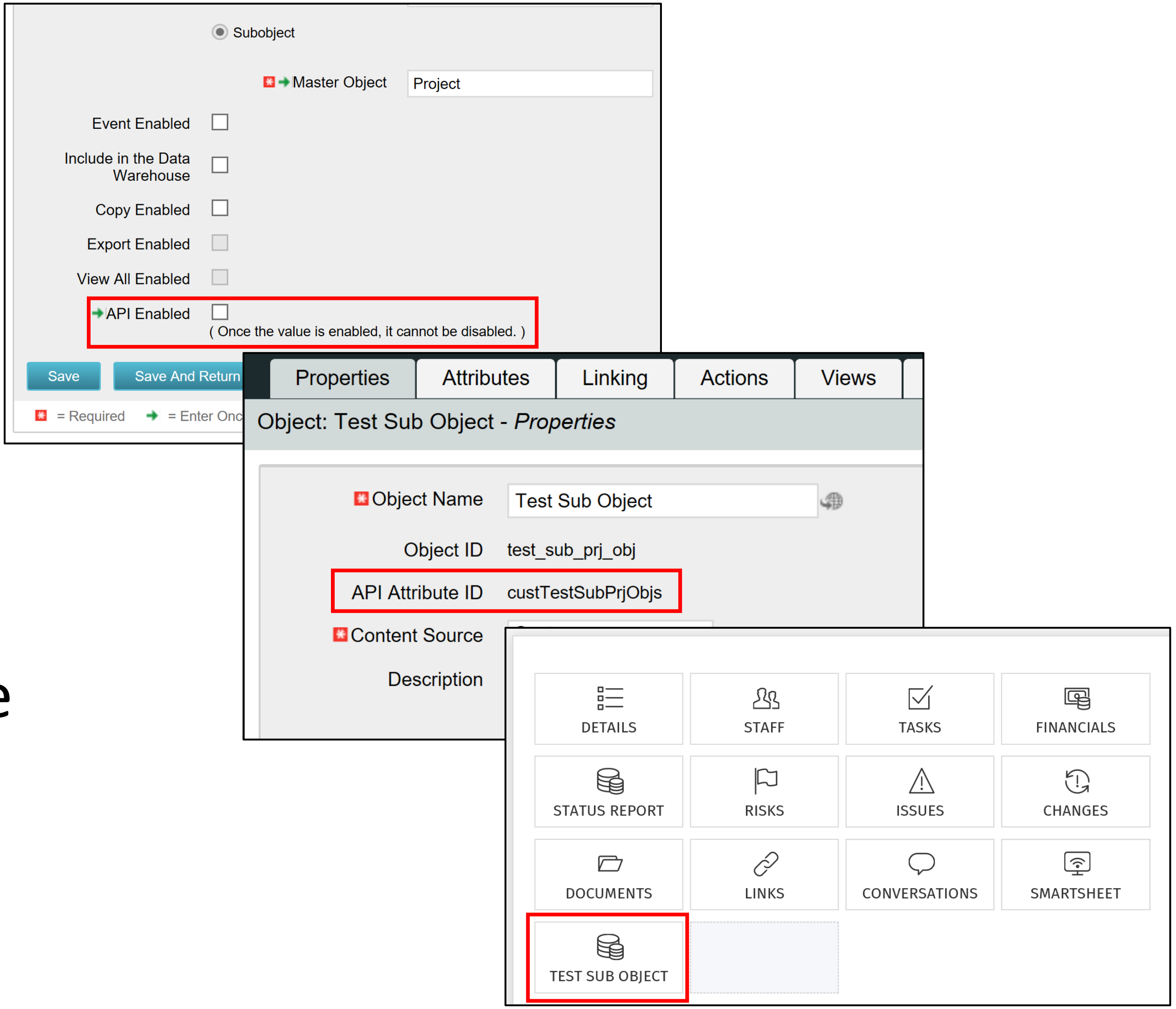
Modules – Channels

- 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



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



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}

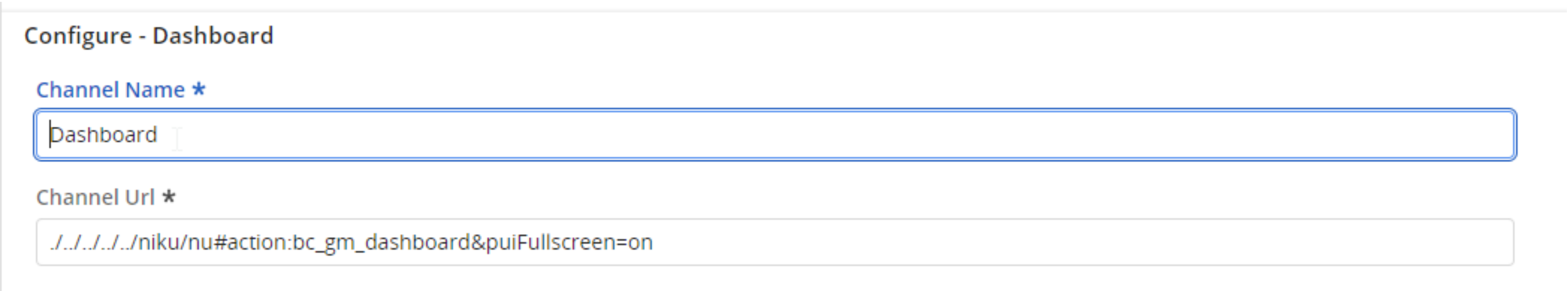
Jaspersoft Example:

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

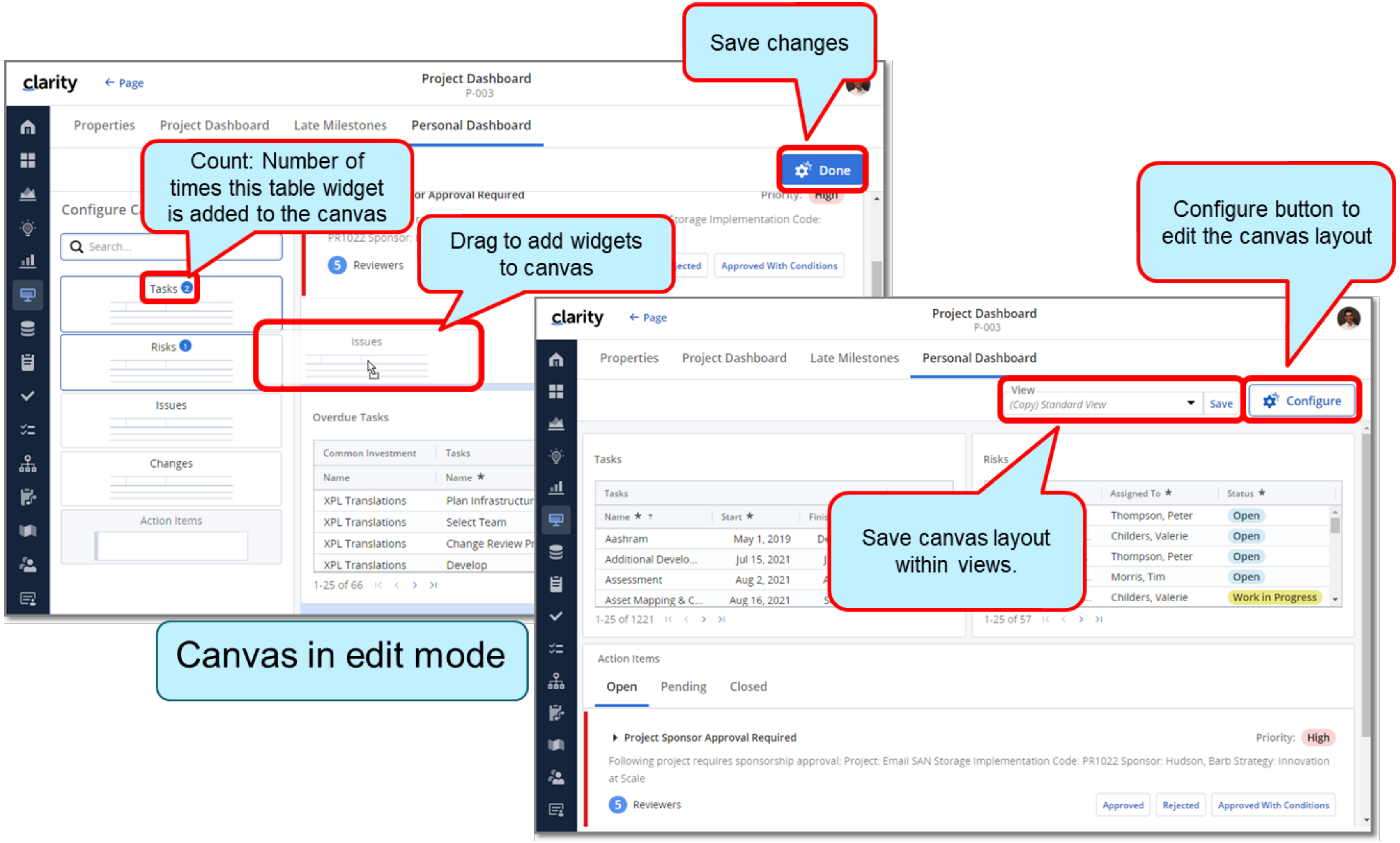


Canvas

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



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.

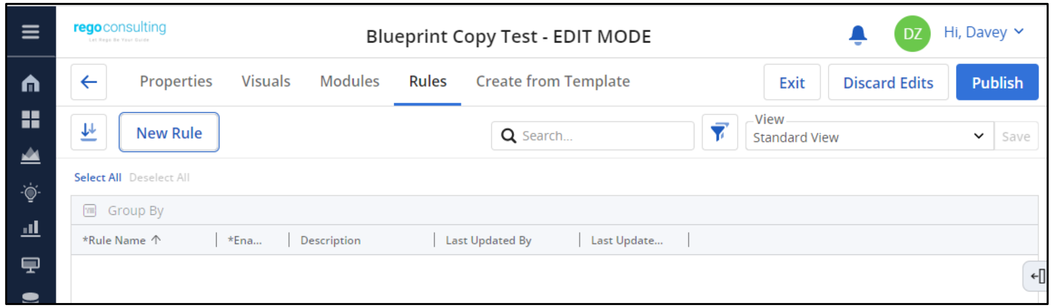
By default, Canvas will be blank and needs to be configured to add widgets. Using the Canvas layout, you can:

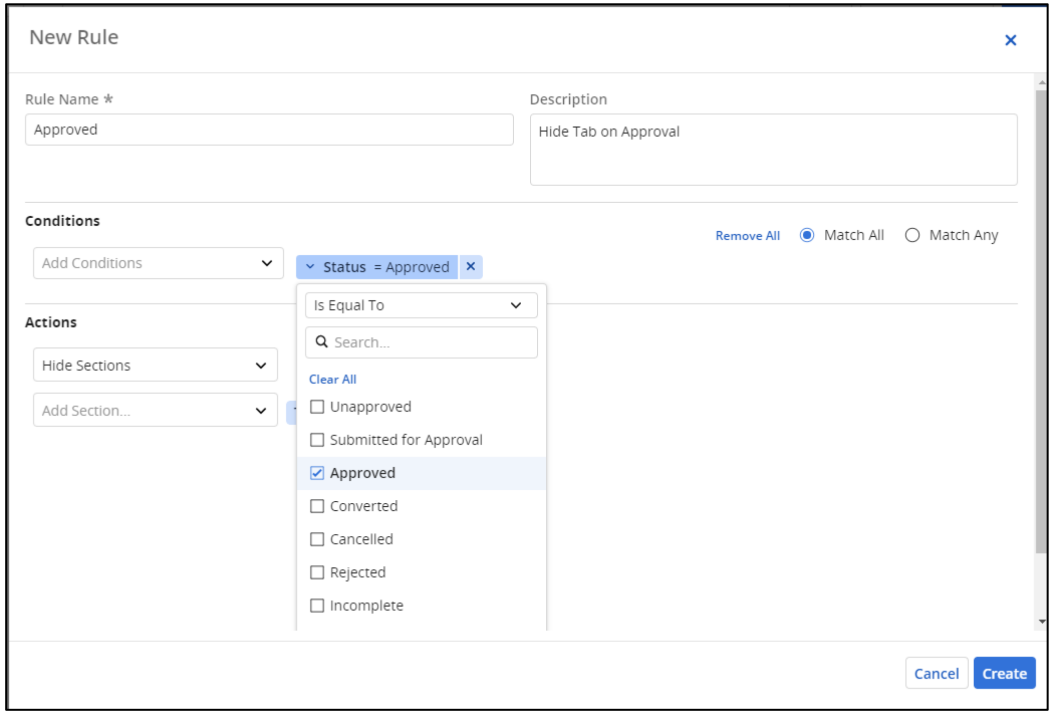
- Add widgets for the following sub-objects in the Canvas layout:
  - Tasks
  - Risk
  - Issues
  - Changes
- Modify the canvas by dragging the available widget or field to the canvas. The canvas will display grey shading on the area where the selected widget/field will be dropped.
- Change the Widgets 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



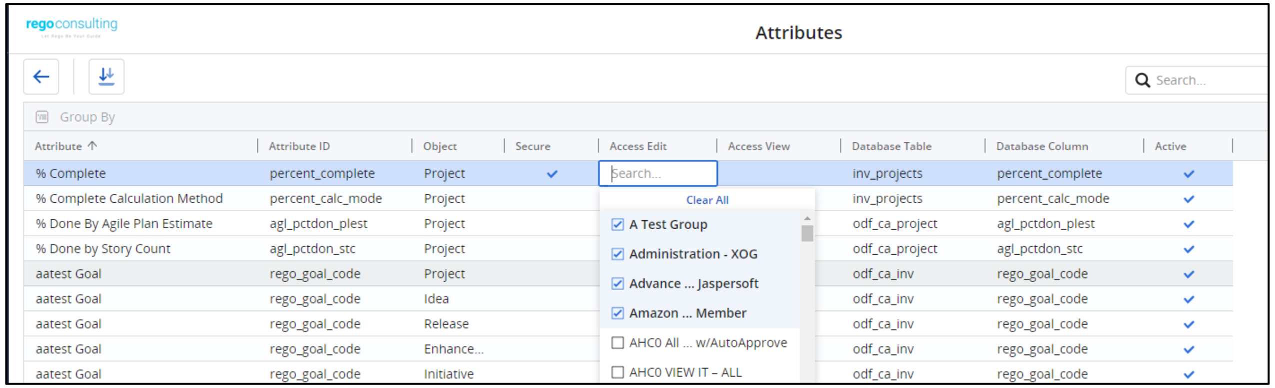


Field Level Security

Attribute Security

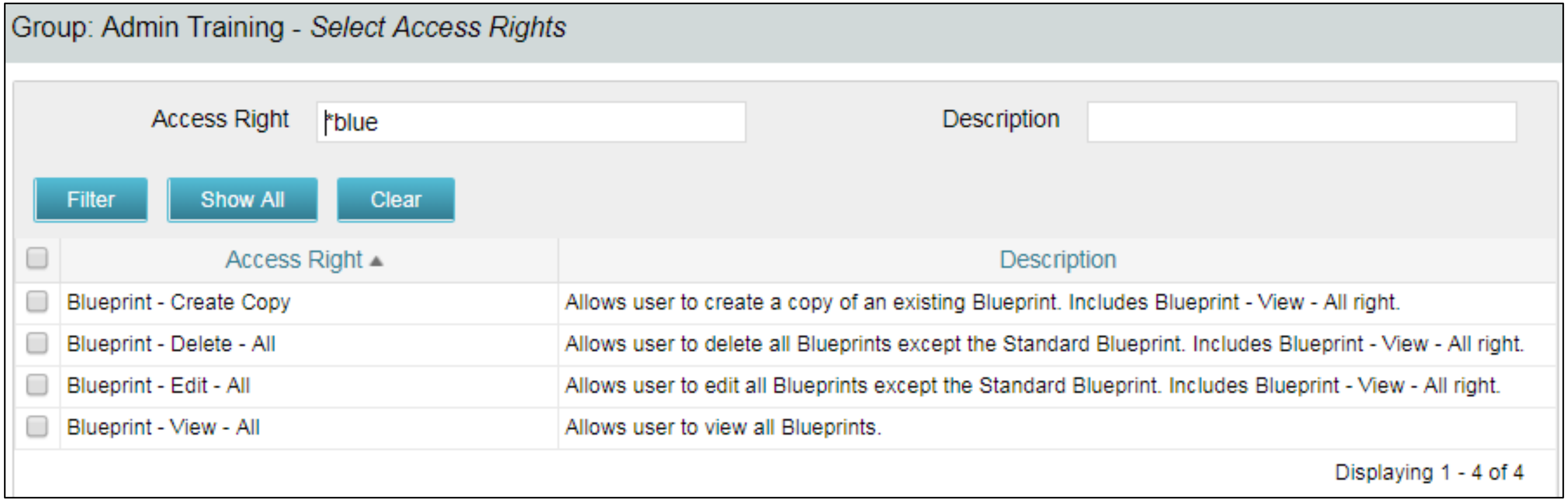
- In the Modern UX there is now the option to secure attributes.
- All master objects can have their attributes secure
- Easy way to avoid users from seeing certain attributes in their configurable list view

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



Blueprint Rights

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



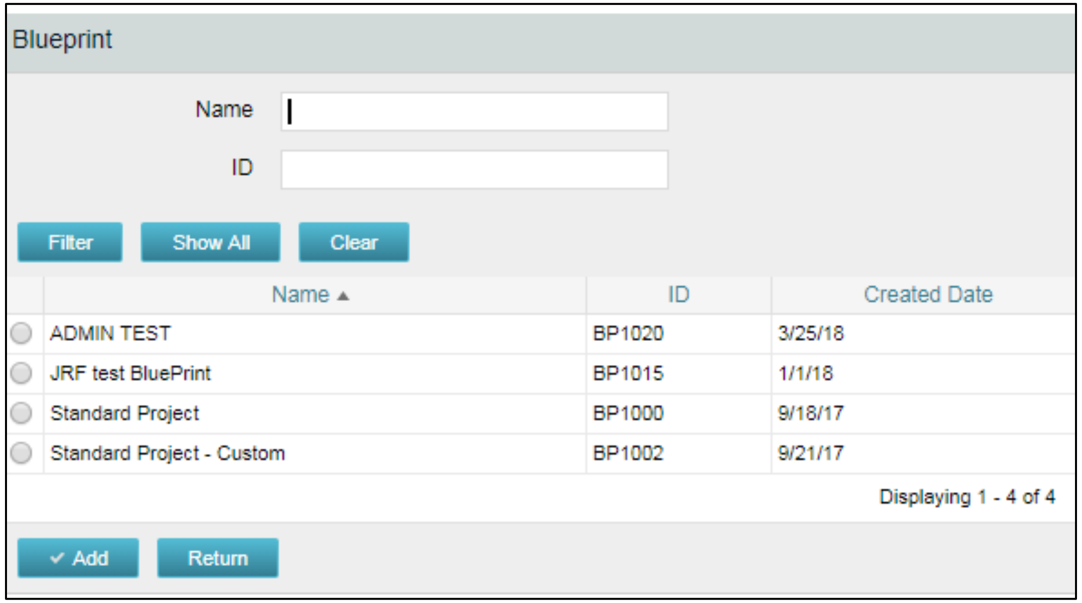
	Access Right ▲	Description
☐	Blueprint - Create Copy	Allows user to create a copy of an existing Blueprint. Includes Blueprint - View - All right.
☐	Blueprint - Delete - All	Allows user to delete all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
☐	Blueprint - Edit - All	Allows user to edit all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
☐	Blueprint - View - All	Allows user to view all Blueprints.

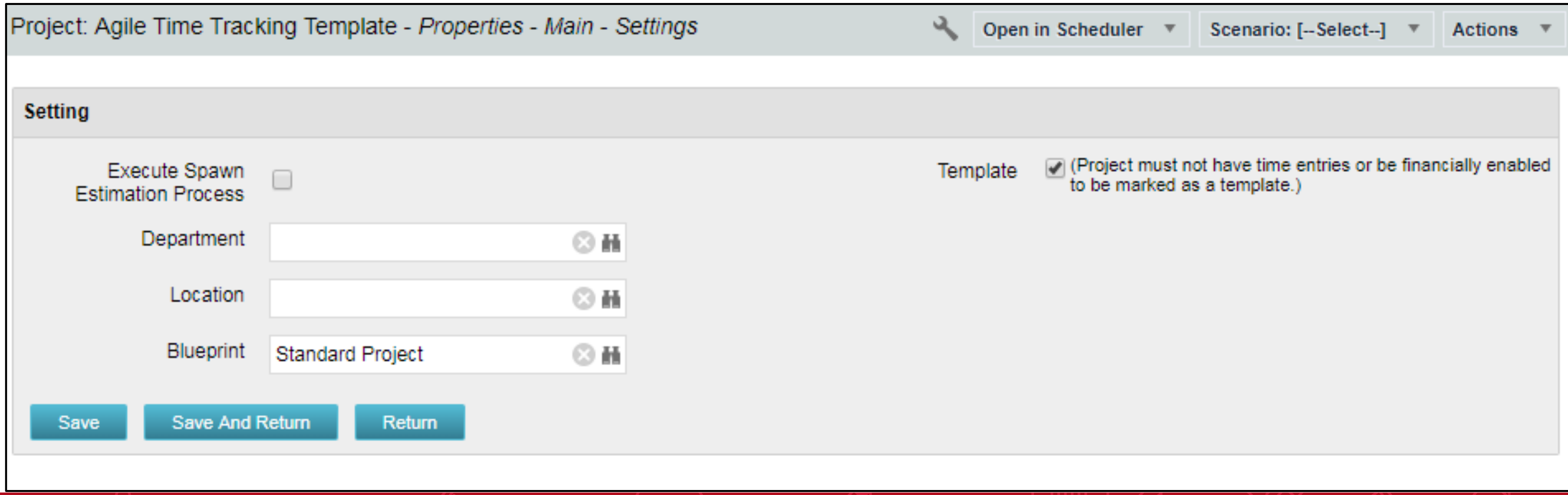
Displaying 1 - 4 of 4

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.

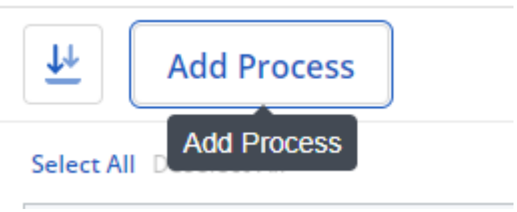


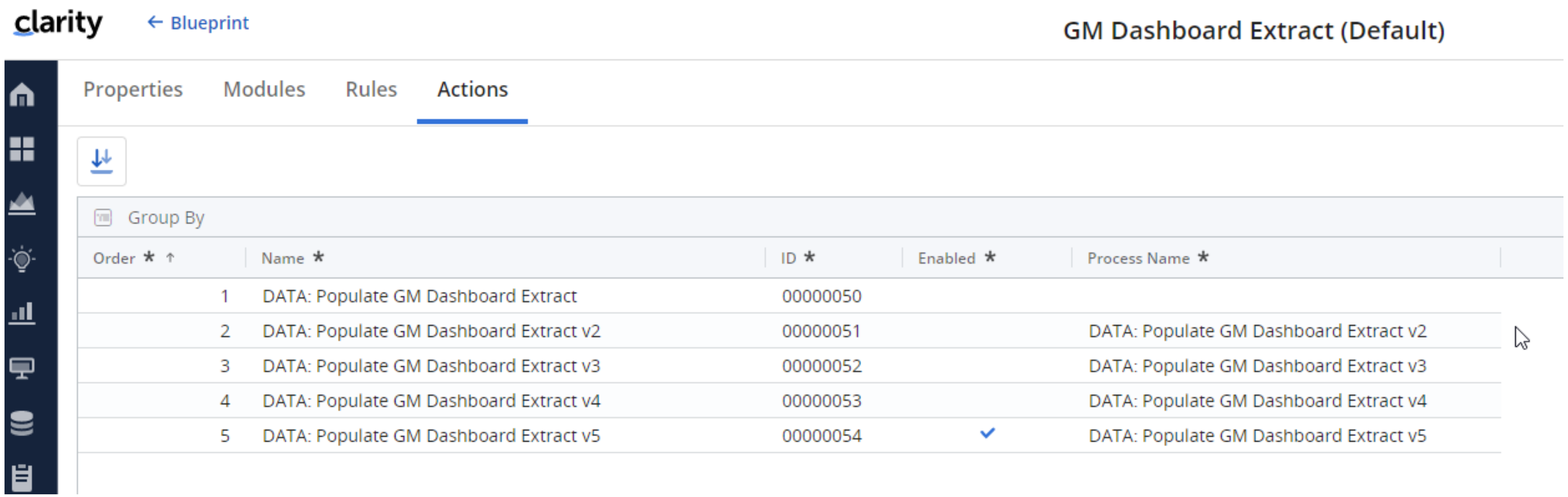


Actions

Actions

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

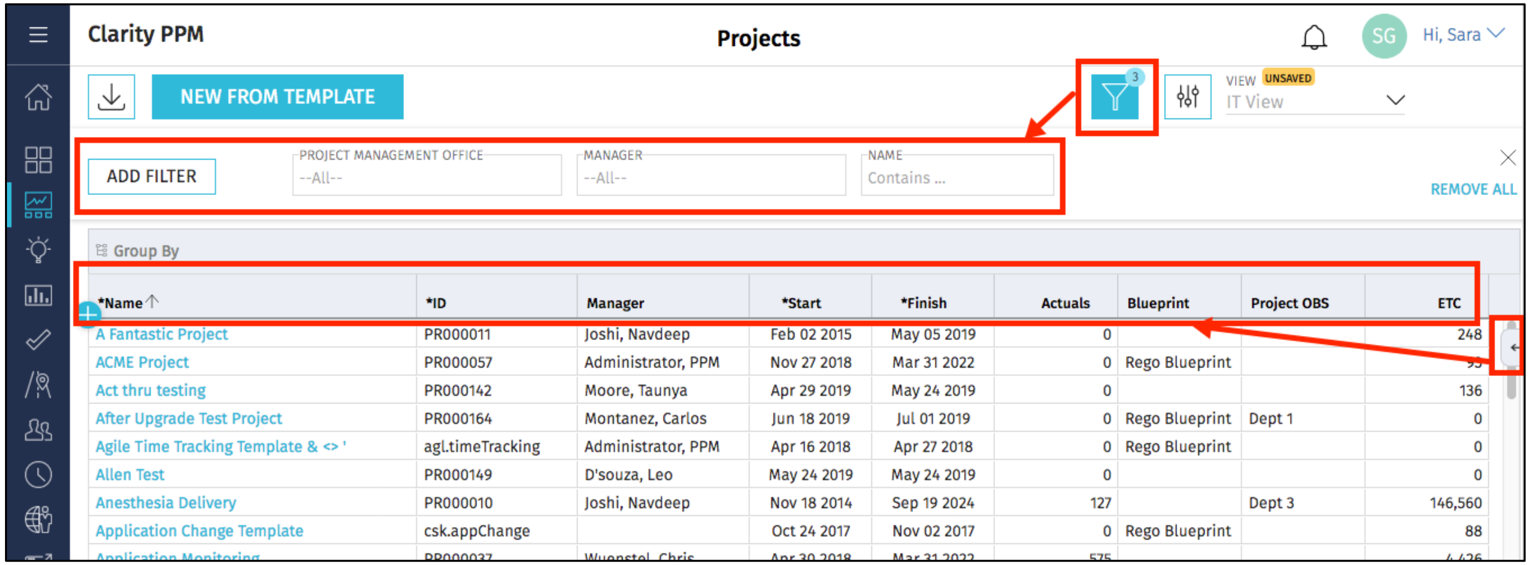




Saving Views and Filters

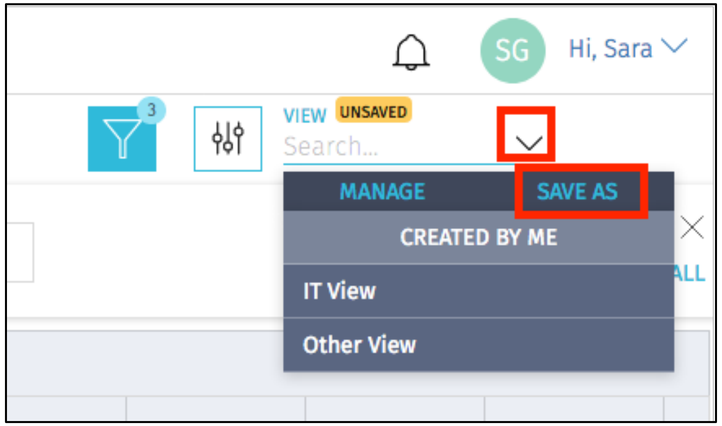
Saving Views and Filters (1)

- 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.

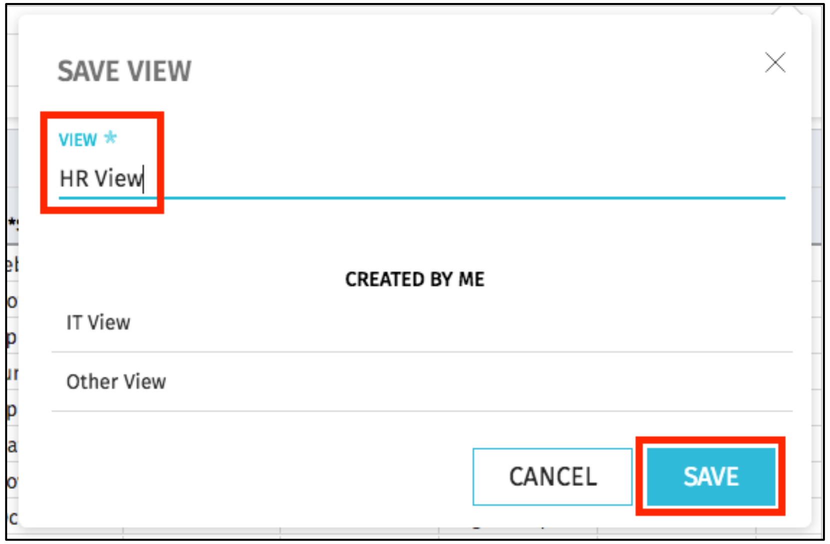


Saving Views and Filters (2)

- 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.

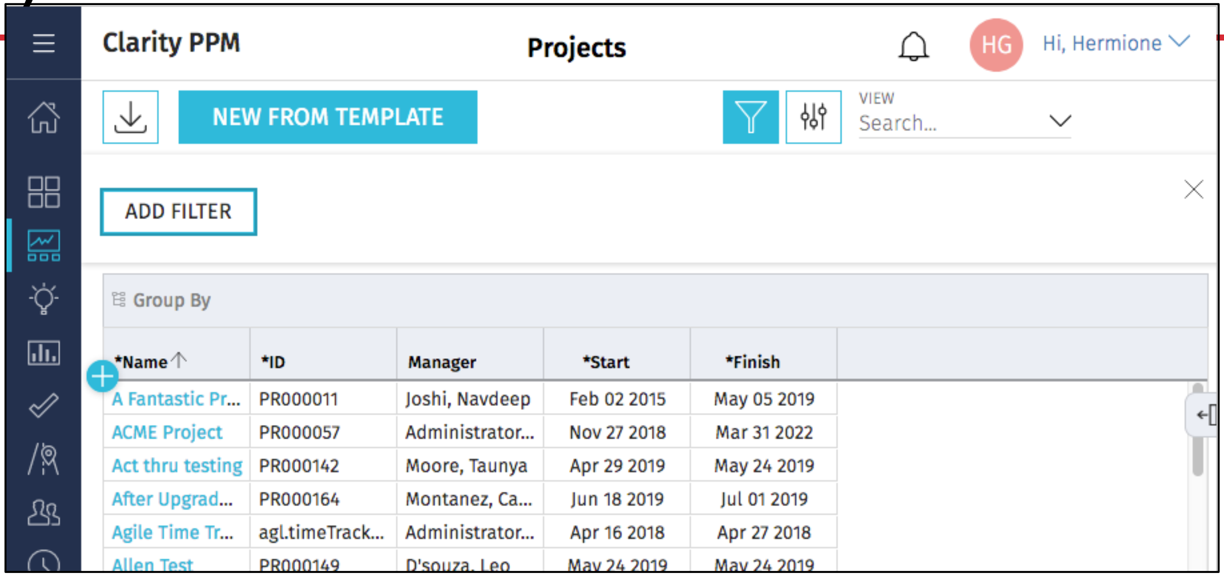


Enter a name for the View, and click **Save**



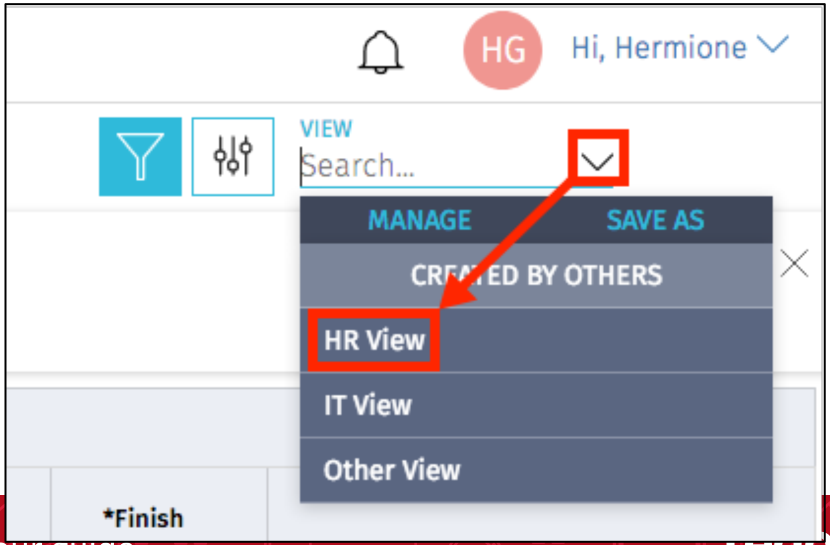
Saving Views and Filters (3)

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



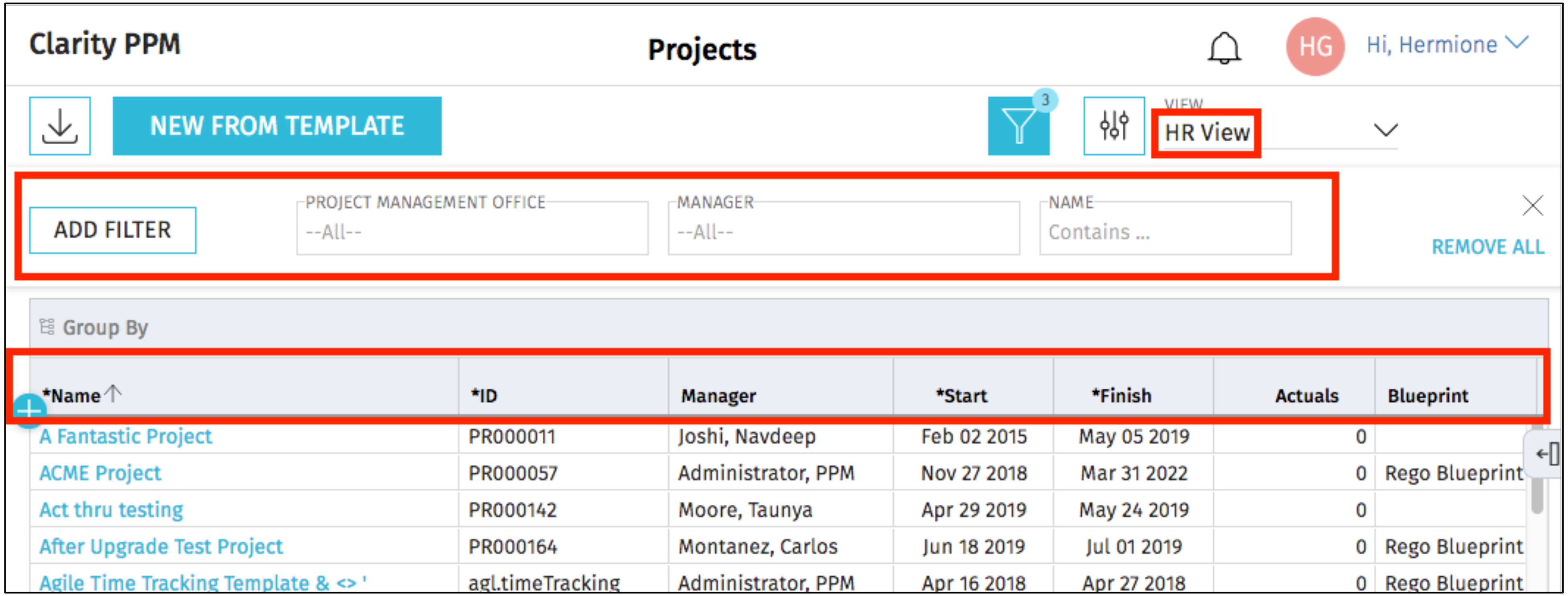
Original View, without desired fields and filters

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



Saving Views and Filters (4)

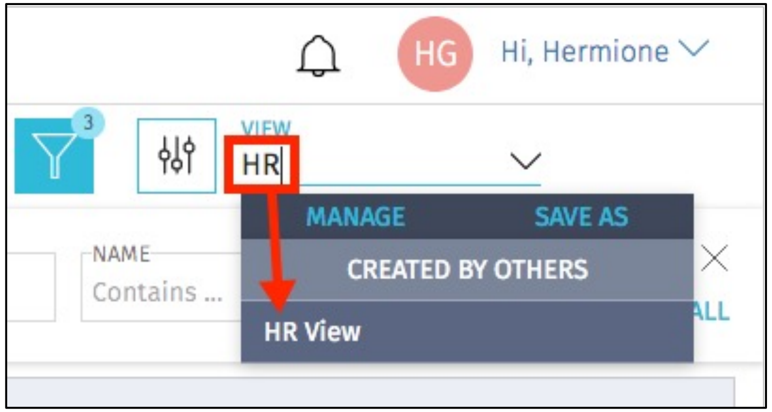
- The new view will now be applied.



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?

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- Date Started = **Today's Date**
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