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NASHVILLE • 2022

Modern UX Administration

Your Guides:

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Introductions

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

Agenda

- Introduction
- First time setup
  - Activating Modern UX and Timesheets
  - Creating a Link to the Modern UX in the Classic Home Menu
- Navigation and modules
- Blueprints

Introduction

Administration in the Modern UX

- The Modern UX Administration is more functional than technical. It can be managed by any user with a good functional understanding of Clarity.
- While some administration activities are done in the Classic Clarity UX, others are available only in the Modern UX.
- Administrators must have a good understanding of what they want to expose and to whom they wish to make functionality available to make best use of the Classic and New functionality.

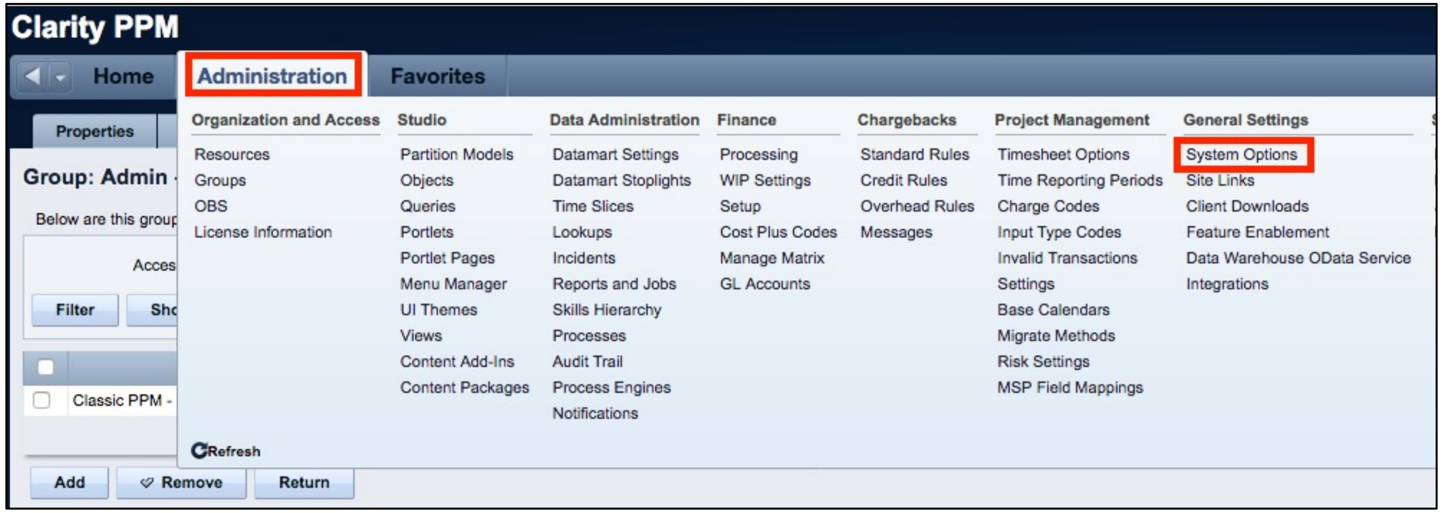
Classic vs. Modern UX

- It is entirely possible to continue using the Classic Clarity UX while beginning to expose portions of the Modern UX to users.
- It's also possible to have an entire organization, or a portion of the organization solely utilize the Modern UX.
- Clarity teams should have a thoughtful discussion before determining their approach.

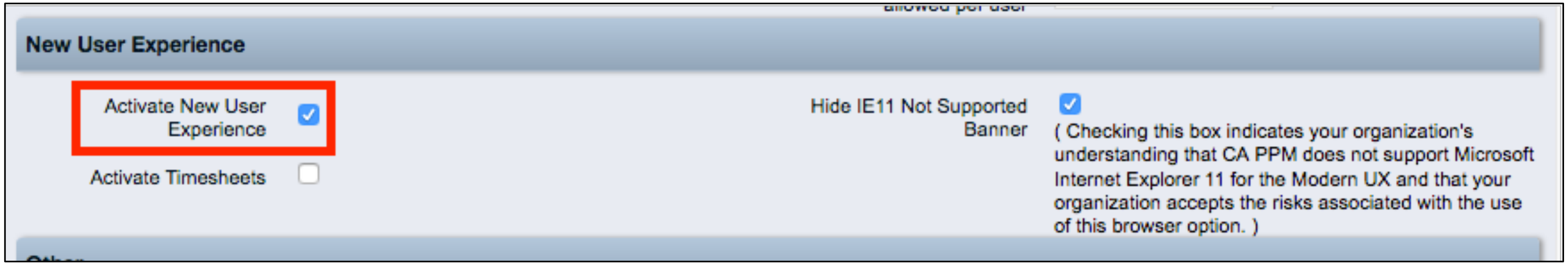
First time setup

Activating the Modern UX (1)

- The first step is to enable the Modern UX for end users.
  - Go to Administration -> System Options
  - Scroll down near the bottom of the page

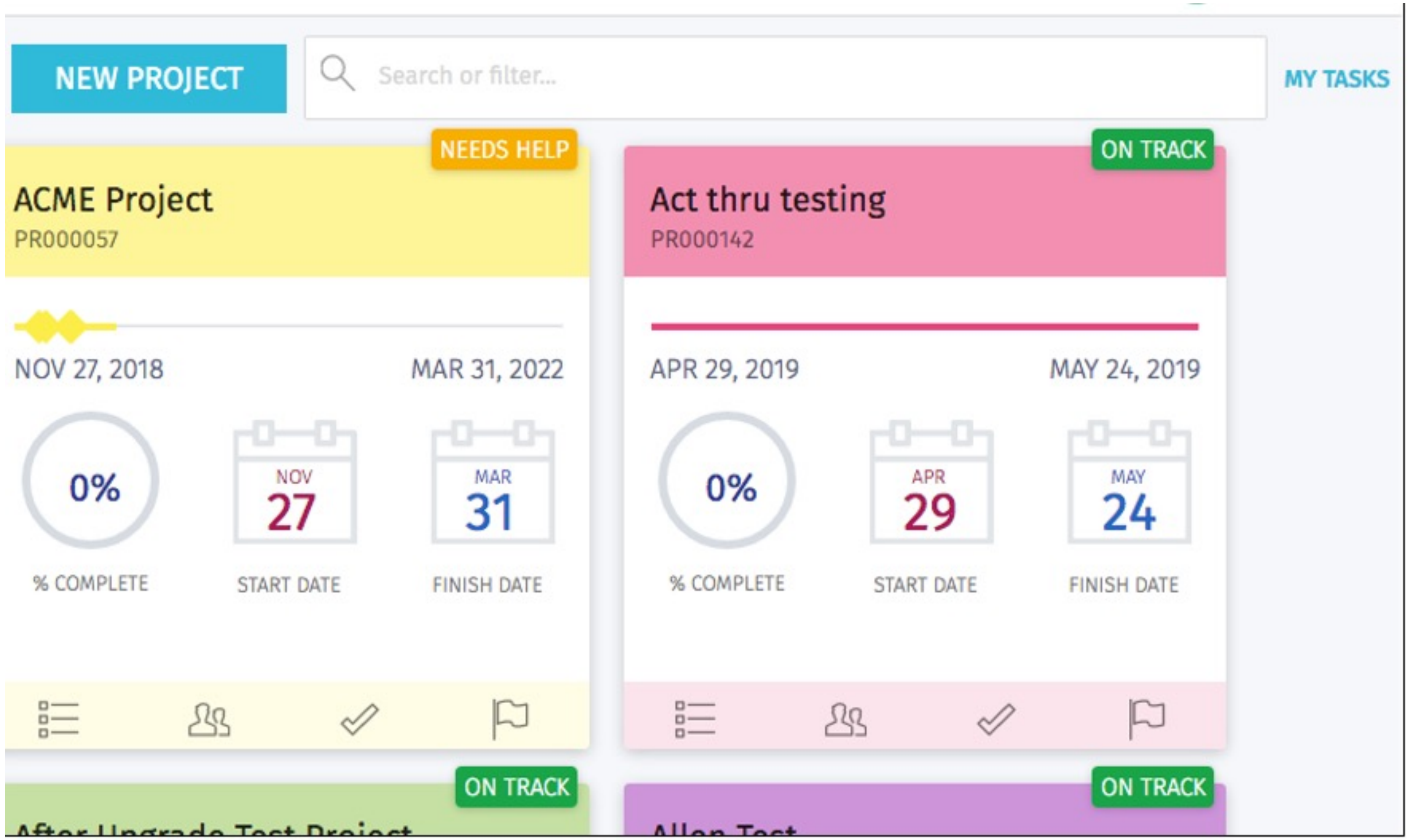


- Check the box to Activate the Modern UX



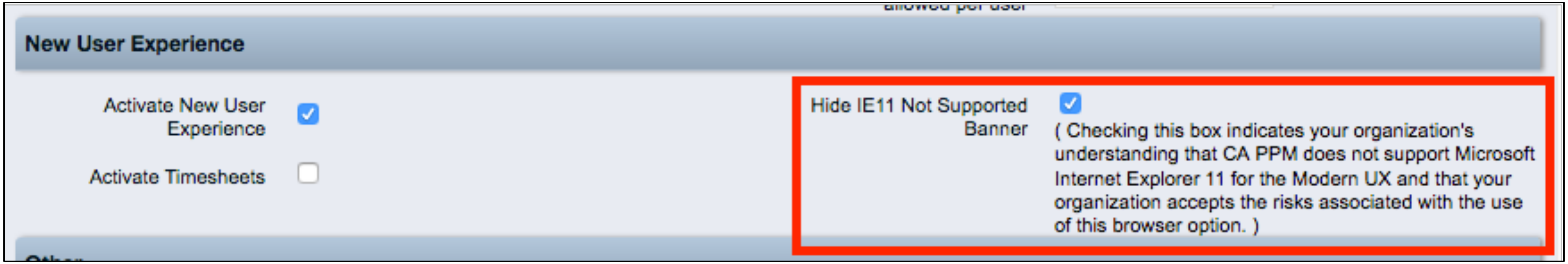
Activating the Modern UX (2)

- Once the Modern UX is activated, the following link will become available:
  - https://[Clarity URL]/pm
- If users will use only the Modern UX, give them this new link to access Clarity.



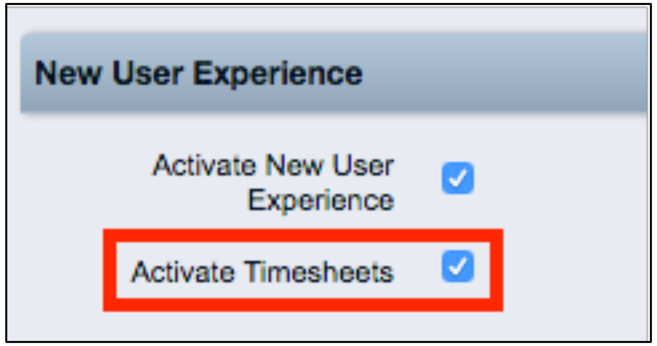
Note on IE 11

- IE 11 is not compatible with the New User Experience. You will want to ensure your organization is using an alternate browser (Edge, Firefox, Chrome, etc.) if you wish to utilize the new Experience.
- If users are using IE 11, they will receive a message indicating the incompatibility. You may check the additional checkbox if you wish to suppress that message.



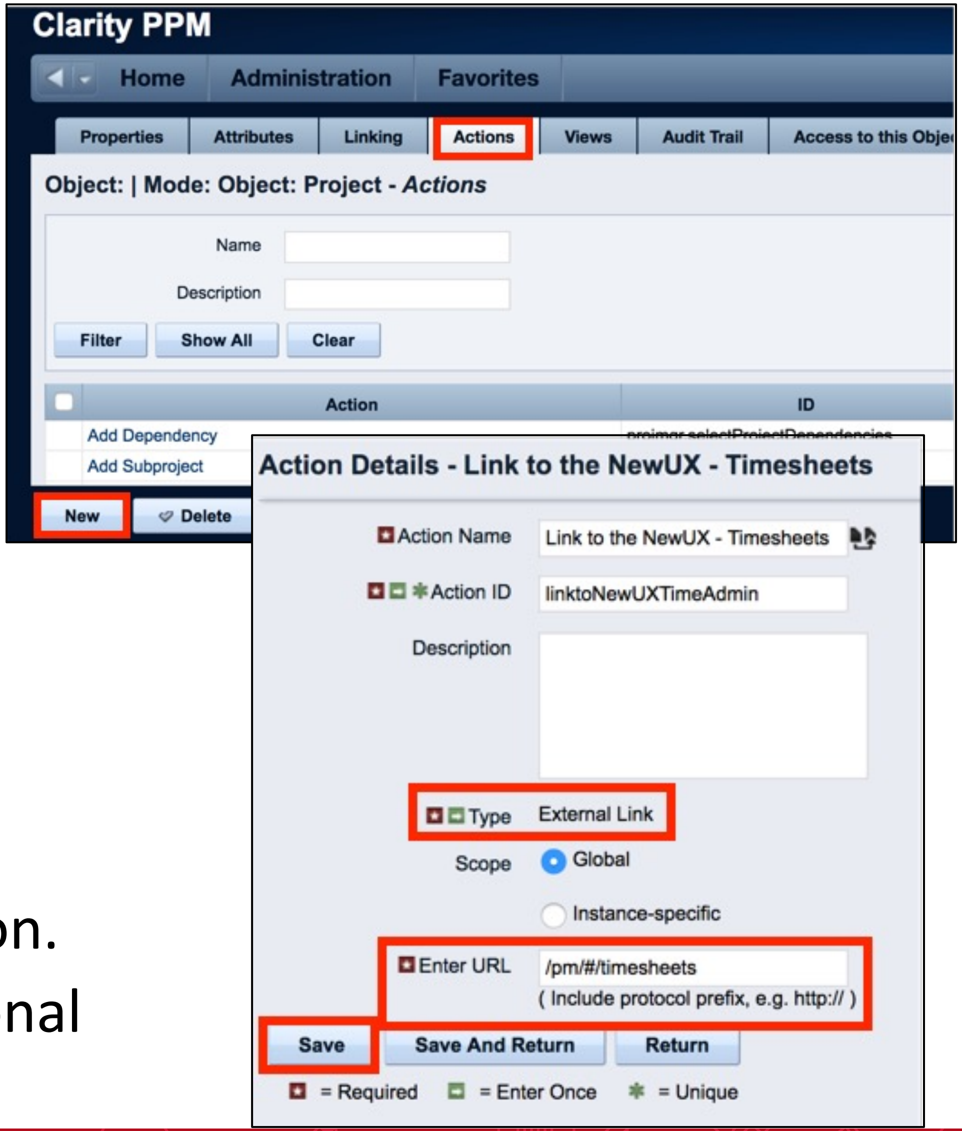
Activating Timesheets

- Modern UX Timesheets can be activated by checking the additional checkbox.
- Once new UX timesheets are activated, the Clock Icon in the quick menu in the upper right corner of the Classic UX disappears as well as the Timesheets link under the Home menu.
- While most Clarity functionality allows users to choose whether they wish to use the New or Classic UX for management, Timesheets are the exception.
- You must decide whether your entire organization is going to use the new or Classic UX timesheet.



Create a Link in the Home Menu (1)

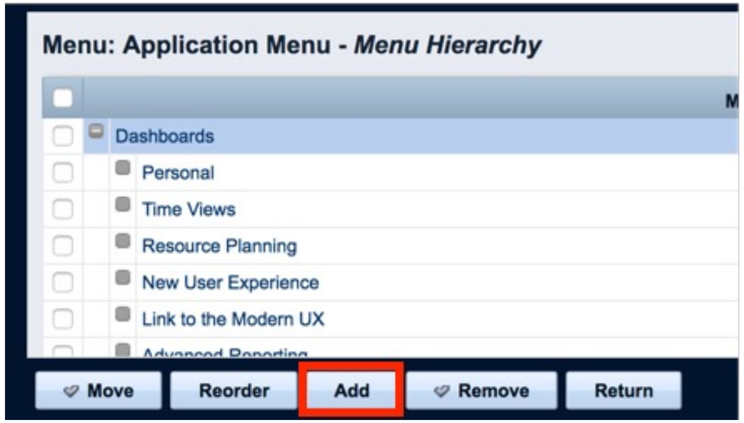
- Once the Modern UX is activated, you may wish to add a link to the Modern UX into the Classic UX Home menu.
  - Navigate to Administration → Objects, then the Project Object.
  - On the *Actions* tab, click the *New* button to create a new Action.
  - Populate the information and include the details for the page you want to be accessed. Ensure that the link is indicated as an *External Link.*
  - Click **Save** or **Save and Return** to create the Action.
  - If necessary, create additional Actions for additional pages (e.g., Timesheets, Staffing, PM, etc.).



Create a Link in the Home Menu (2)

- Now that the Action is created, the next step is to add the link in the Menu Manager.
  - Go to *Administration->Studio->Menu Manager* and select *Application Menu.*

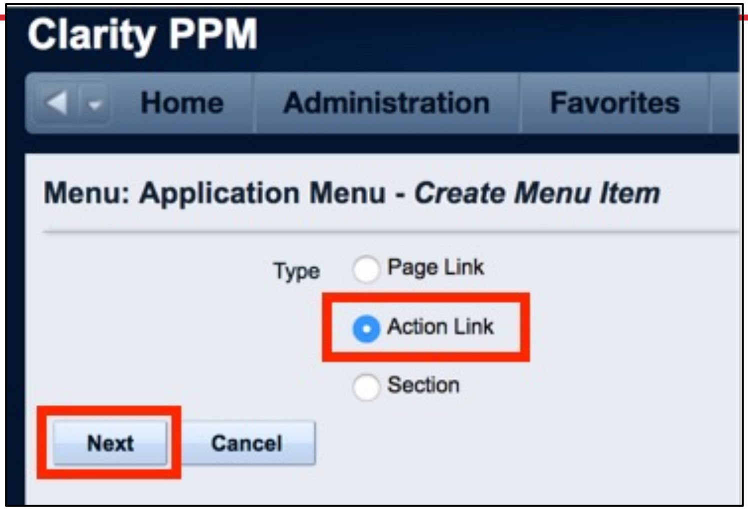
  - Click the **Add** button.

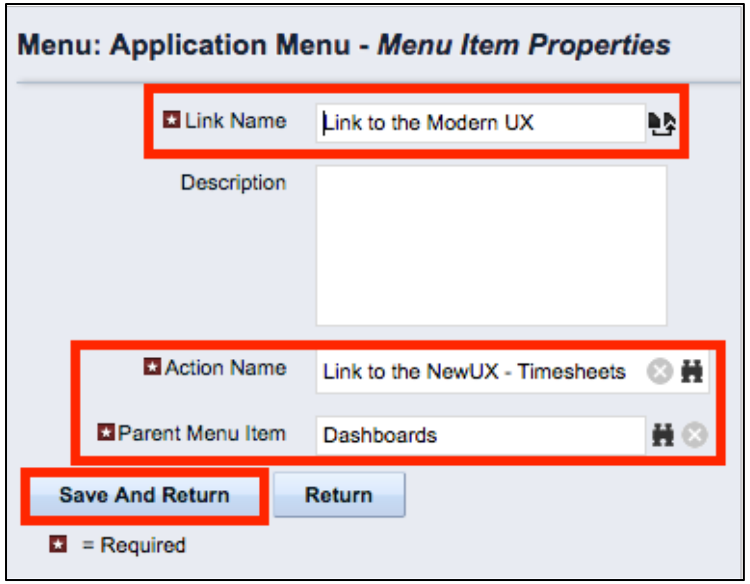


Create a Link in the Home Menu (3)

- Select *Action Link* and click **Next**.
- Populate a Link Name (this is what will appear in the Home Menu), then select the Action you just created in the *Action Link* field. Determine the parent menu item in the menu, then click **Save and Return.**

- The link is added to the Menu. You may move it to a different location if necessary.
- NOTE: The links will appear for all users regardless of access.

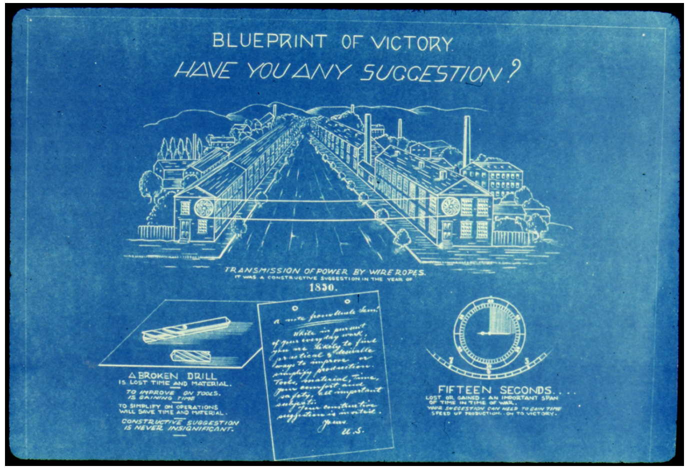




Blueprints

Overview

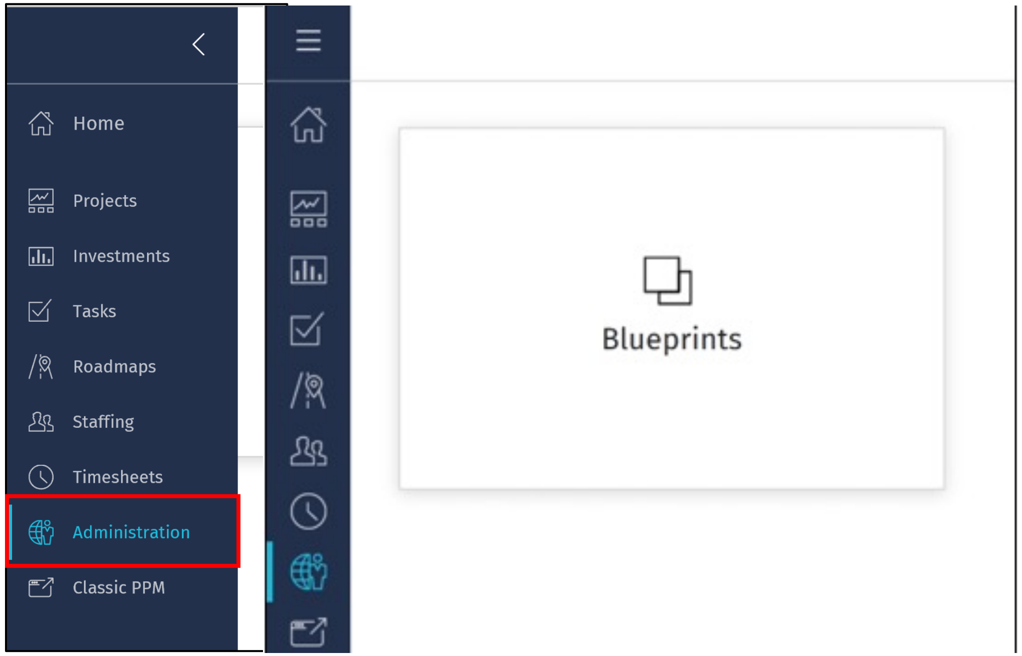
- Blueprints are configurable layouts in the New User Experience for Ideas, Projects and Custom Investment Types
- For Projects:
  - Blueprints are associated to Project Template(s)
  - These tailored views can be created for different project types or organizations
  - Stakeholders see the relevant metrics and key information necessary for the project(s)
    - Attributes
    - Visuals
    - Modules/Tabs
- For Ideas and Custom Investment Types
  - Blueprints are associated to the specific Idea or Custom Investment Type
    - Depending on version, you can Blueprint the Details tab, and include Custom Subobjects or Links.
- Users see the right data at the right time for the right work



Navigation

- To have the ability to view and update Blueprints, a user requires the following security rights
  - Blueprint – Create Copy, Blueprint - Delete – All, Blueprint – Edit – All, and/or Blueprint – View – All

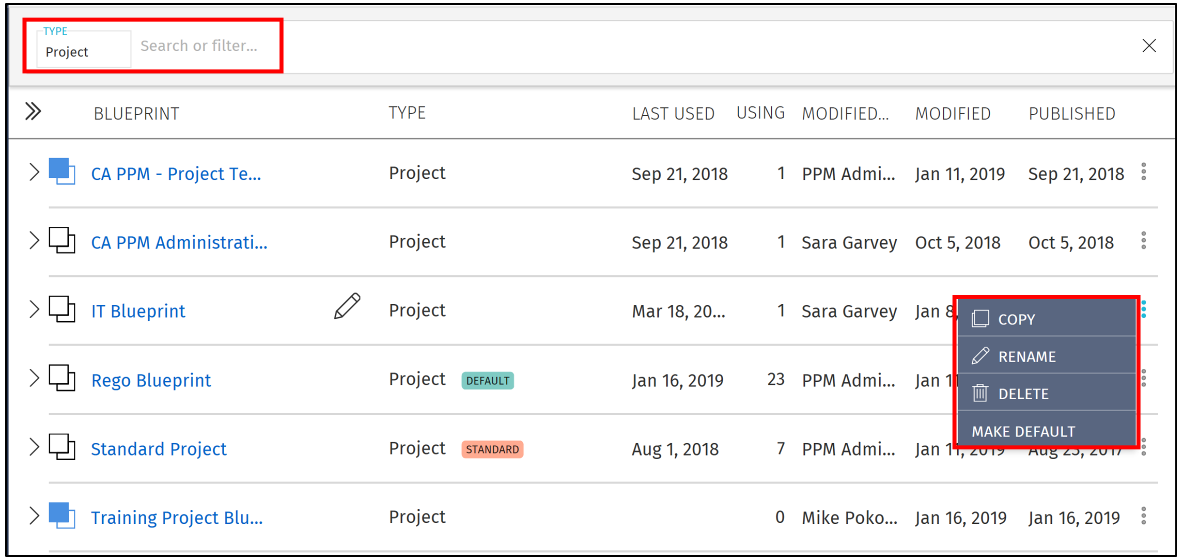
1. Once in the New User Experience, Click on the 'Administration' Icon
2. Click on the 'Blueprints' tile
   - Here you will see the list of Blueprints create in the system



Blueprint Views

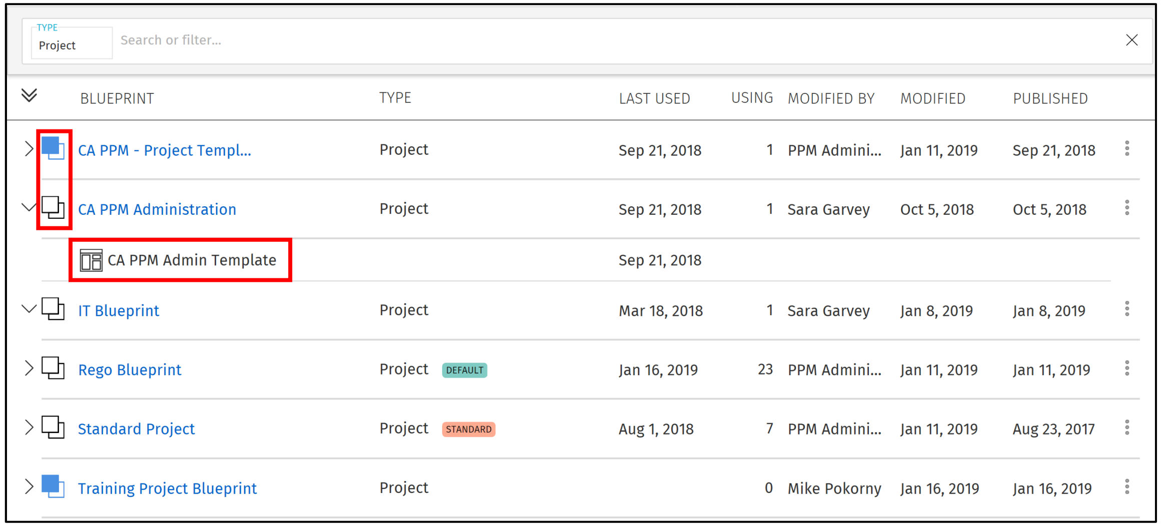
Blueprint List View

- Here you will see a list of all of the Blueprints that have been created in the system
  - The list is filterable; can filter by Blueprint type (e.g., Idea vs. Project vs. Custom Investments)
- There are multiple options for a Blueprint
  - Copy – Create a new Blueprint which is a one for one copy
  - Rename – Rename the Blueprint
  - Delete – Delete the Blueprint
  - Make Default
    - Any newly created Idea or Custom Investment will inherit this Blueprint.
    - Projects not created from a template will inherit this Blueprint.



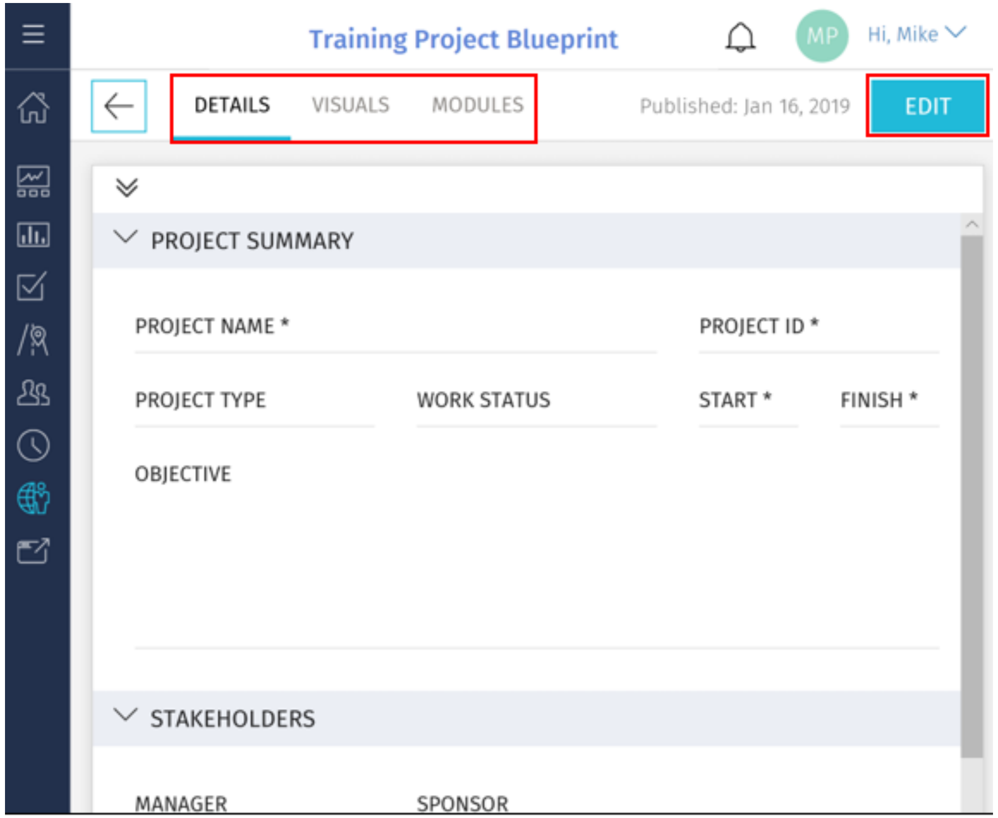
Blueprint List View cont.

- Next to the Blueprint name are Blue or White Boxes which indicate if the Blueprint has unpublished changes.
  - Blue – Unpublished Changes
  - White – Published
- Nested under each Project Blueprint are the Templates that have been associated to it.
  - This association is changed by simply dragging and dropping the template
- Templates marked as Standard may not be edited. To edit them, first make a copy.



Properties Tab

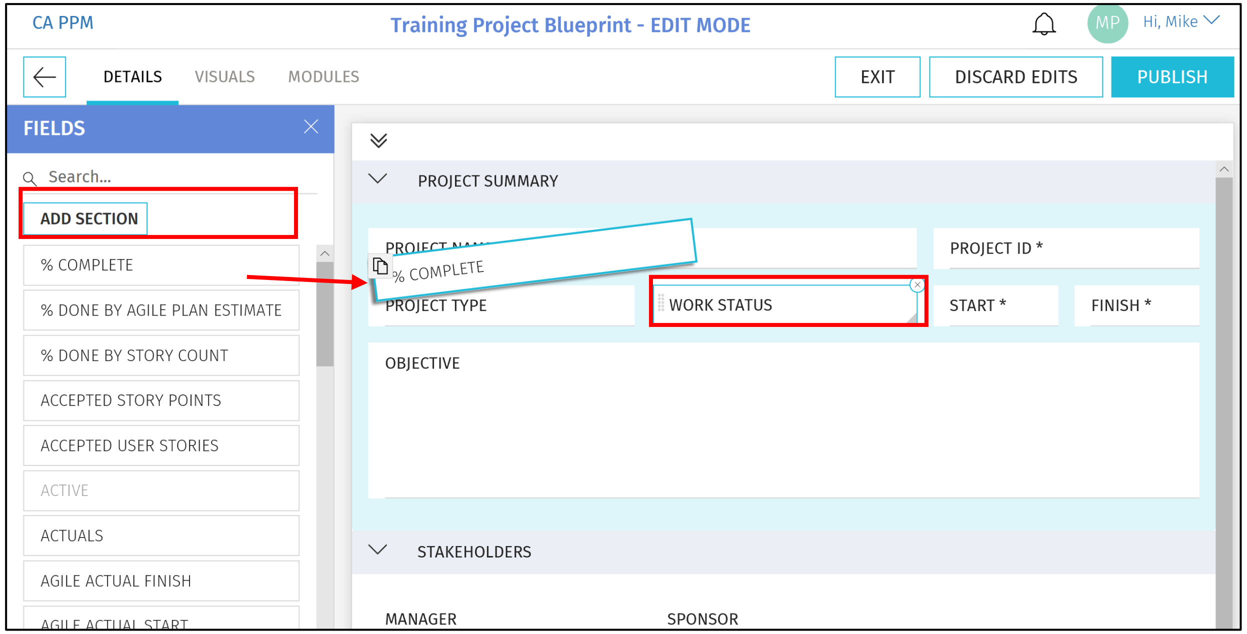
- On Project Blueprints, there are 3 main concepts that can be edited. We will go more in-depth later on these topics.
  - Details – This is the main details or properties page for the Project/Custom Investment Type. Here you can add or remove fields and sections. You can also move and resize fields by dragging and dropping them.
  - Visuals – These are the icons on the Project Tiles. There can be a maximum of 3, but there is a minimum of 1 required. Currently, these are only available for the Project Blueprints.
  - Modules – These are the supporting “pages” that can be added or removed from the Project. The modules include functionality like Financials, Teams, Risk, Issues, Changes, etc. Currently, these are only available for Project Blueprints
- By clicking the Edit button, you will be taken Edit Mode where you will be able to modify the different Blueprint topics.



Blueprint Configuration

Details

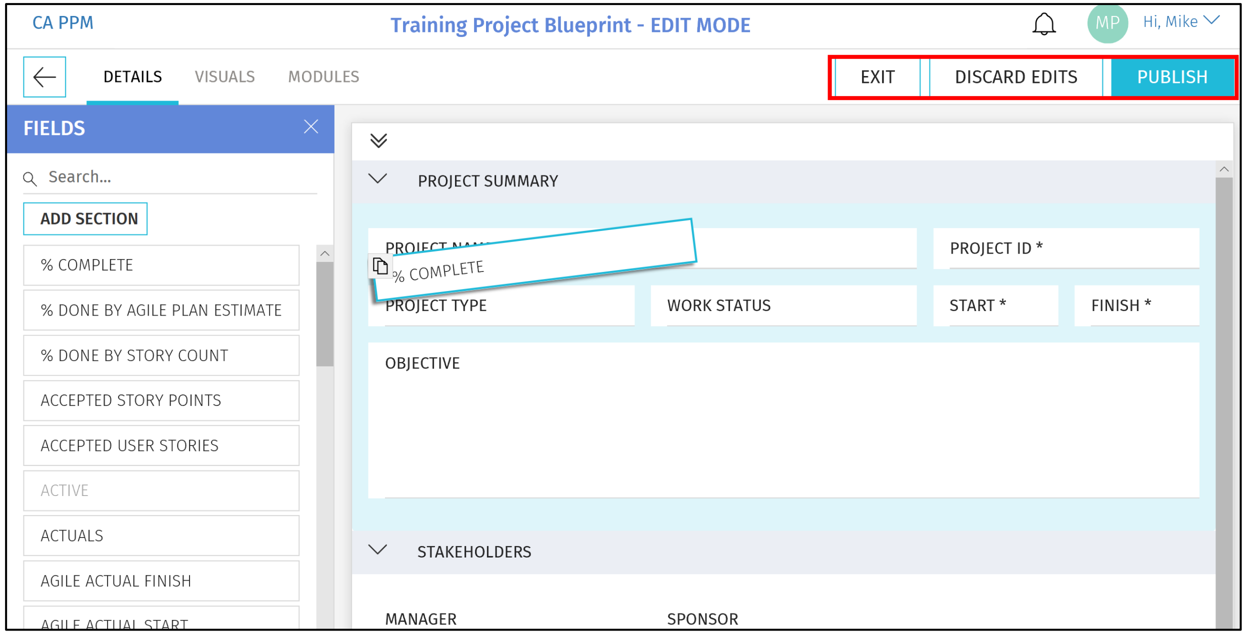
- Fields Pane
  - Location of the fields you can add to the sections of your Details
    - By default, it contains a list of out-of-the-box Project and Investment fields
    - Custom fields and sub-objects can be added and will be covered later
  - Fields that already exist on your Blueprint are greyed out
  - Click the Add Section button to add a new section to the Details
- Fields
  - Add or Move a field by simply dragging and dropping the field into a section
  - Remove a field by clicking the X in the top right-hand corner of the field
  - Resize the field by dragging the bottom right-hand corner of the field



Note: The following attribute types are not compatible with the New User Experience: Custom Time-Scaled Value (TSV), Attachments, and URLs

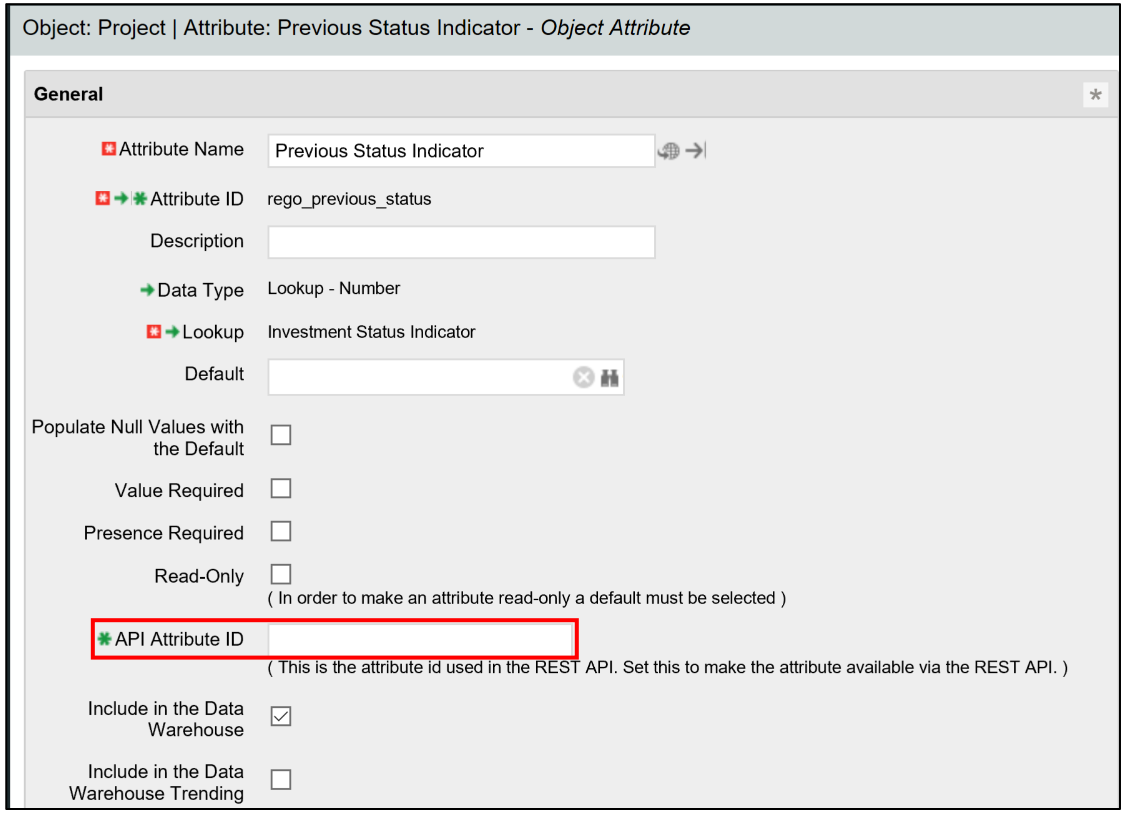
Details cont.

- Details Options
  - Exit - Allows you to save your changes without Publishing the new view to Users
  - Discard Edits – Removes the change you have made
  - Publish – This Publishes the new view all the users for the Projects associated to this Blueprint



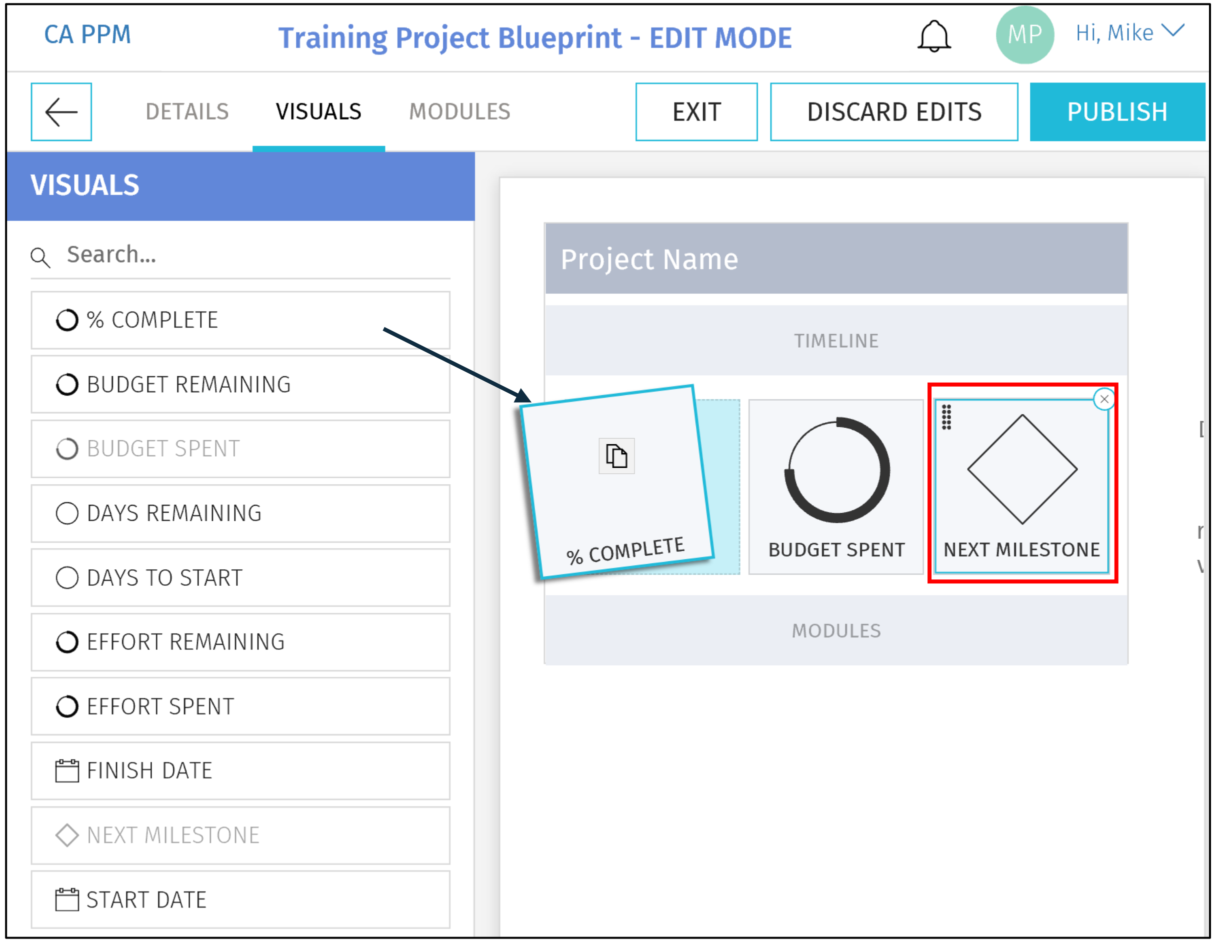
Details cont.

- Custom Attributes can be made available in the Fields list through the attribute properties on the Object in Classic PPM
    - Populate the ‘API Attribute ID’ with a value
    - Once saved, the attribute will be available in the Fields List for the Blueprints
    - It is suggested to make the API Attribute ID like the Attribute ID



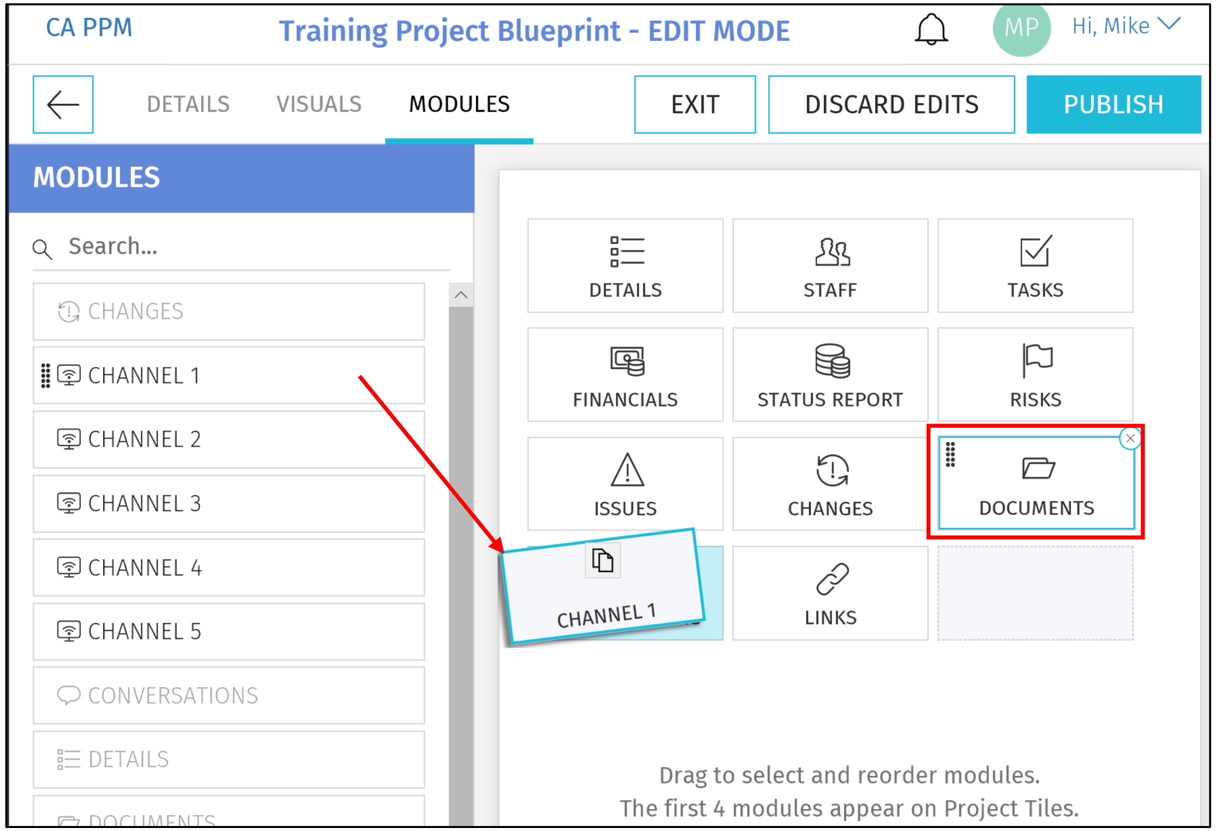
Visuals (Projects Only)

- Visuals are displayed on the Project Tiles
- Currently, there are 10 out-of-the-box Visuals to choose from
- Add or Move Visuals by simply dragging and dropping it
- Remove a Visual by clicking the X in the top right-hand corner of the icon



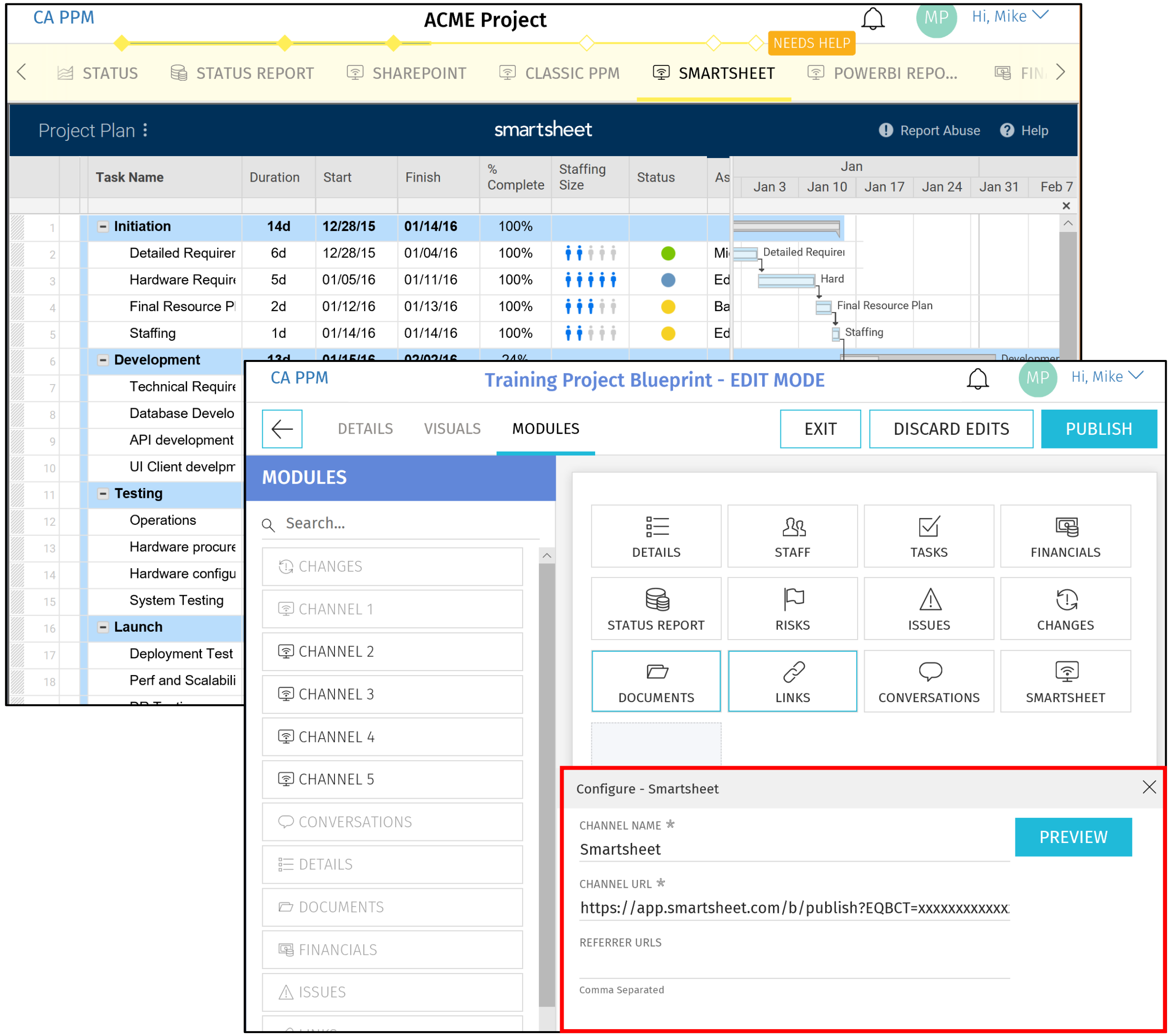
Modules

- 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



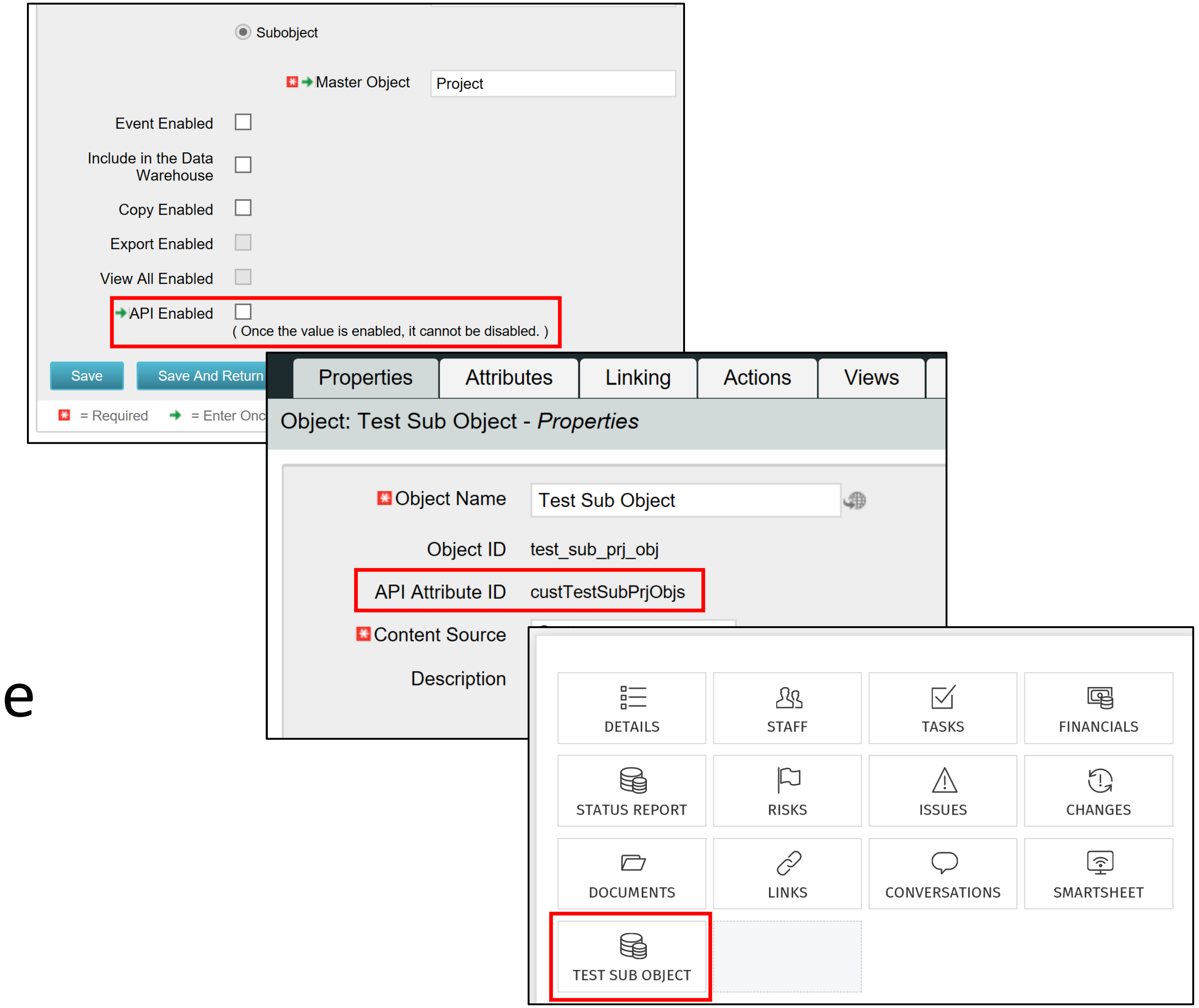
Modules – Channels

- 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



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: *blue

Description:

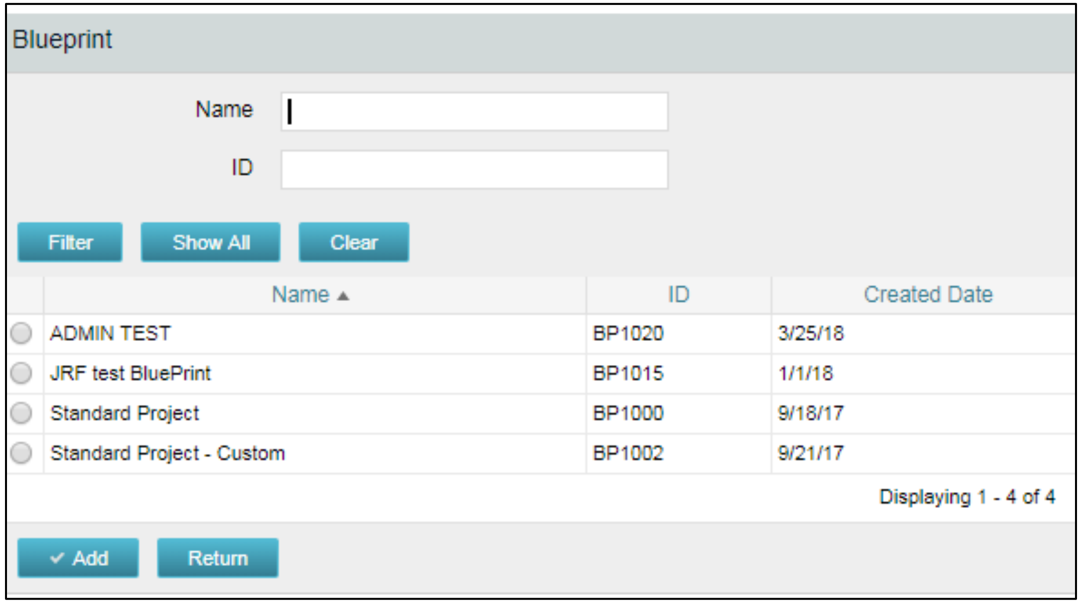
Filter | Show All | Clear

	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.

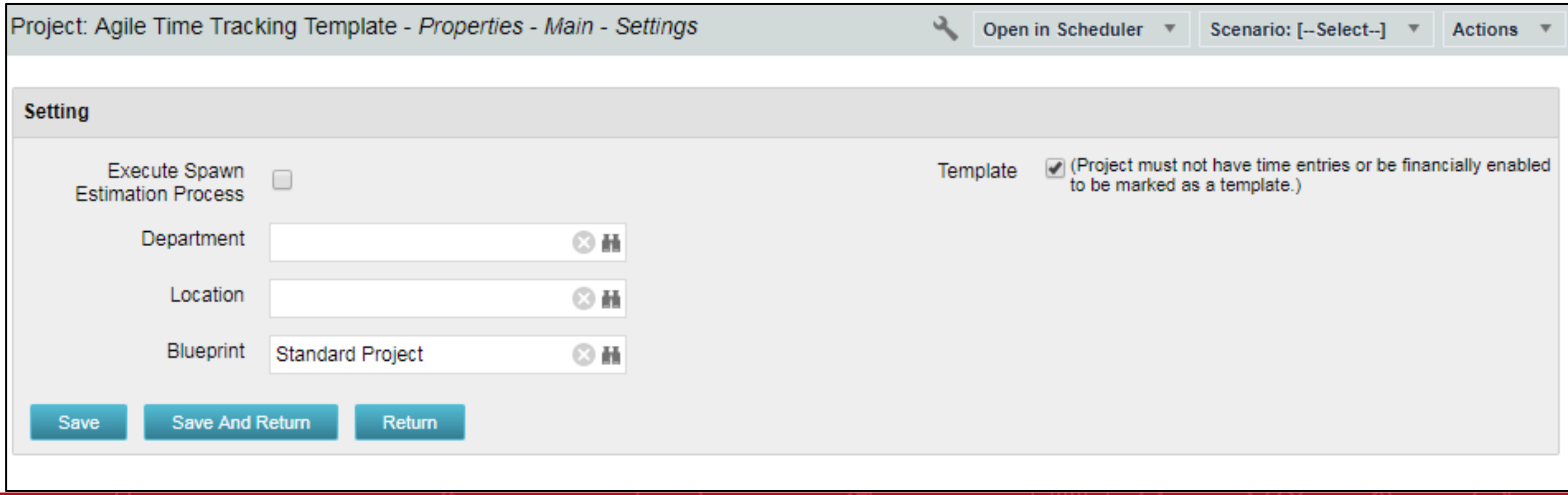
Displaying 1 - 4 of 4

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.



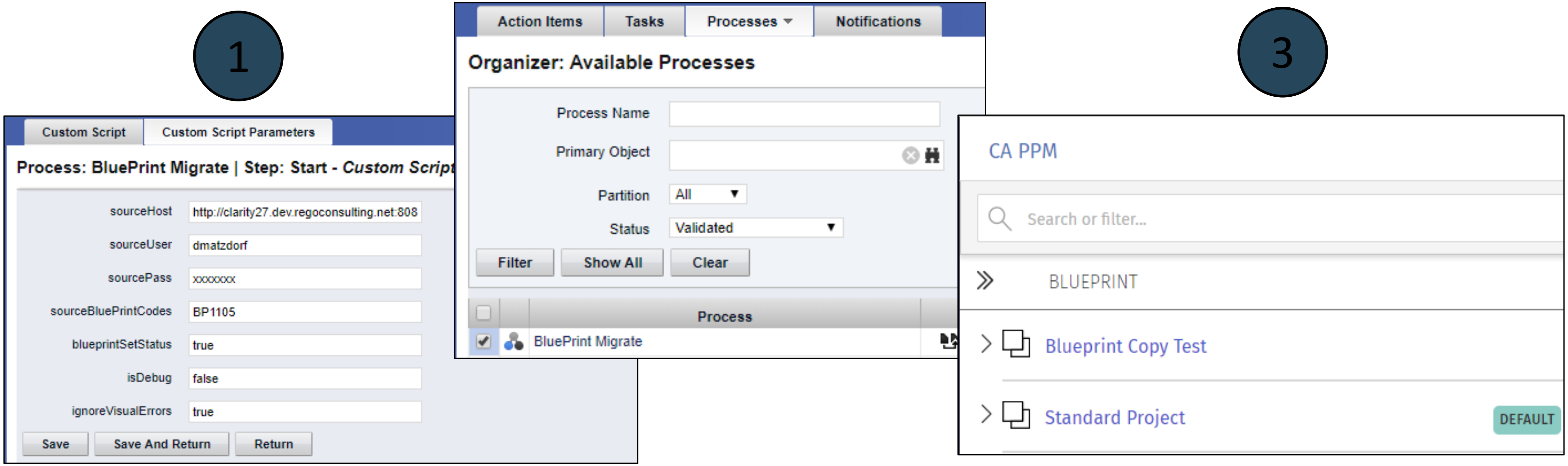
Suggested: Add to the SETTINGS subpage of your projects.



Rego - Blueprint Migrator

Rego Innovation - Blueprint Migrator

- Migrate Blueprint configuration from one environment with a simple process
- Steps: 1) Update Process Parameters 2) Run the Process 3) Target blueprint pulled into current environment



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- 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!
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