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SAN DIEGO • 2023

Migrating to Modern UX

Best Practice and Lessons Learned

Your Guides:

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Introductions

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

Agenda

- Why?
- Migration Strategies
- Tactical Checklist
- Tips and Tricks

Part I 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 16.1.3.
 - Gaps list is minimal

What we're seeing...

- Due to the pace of Broadcom releases, some companies are not aware of the latest capabilities or the fact that the Modern UX can be turned-on in stages.
 - [Clarity Release Summary](#)
 - [Clarity Feature Function Comparison](#)
- The perception of oversized change management and loss of functionality is exaggerated.
- Companies that are newer to Clarity have been able to move over more quickly.
- In the past, larger companies with heavy configuration have been waiting to move to the Modern UX until certain features were available, that time has come.



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.

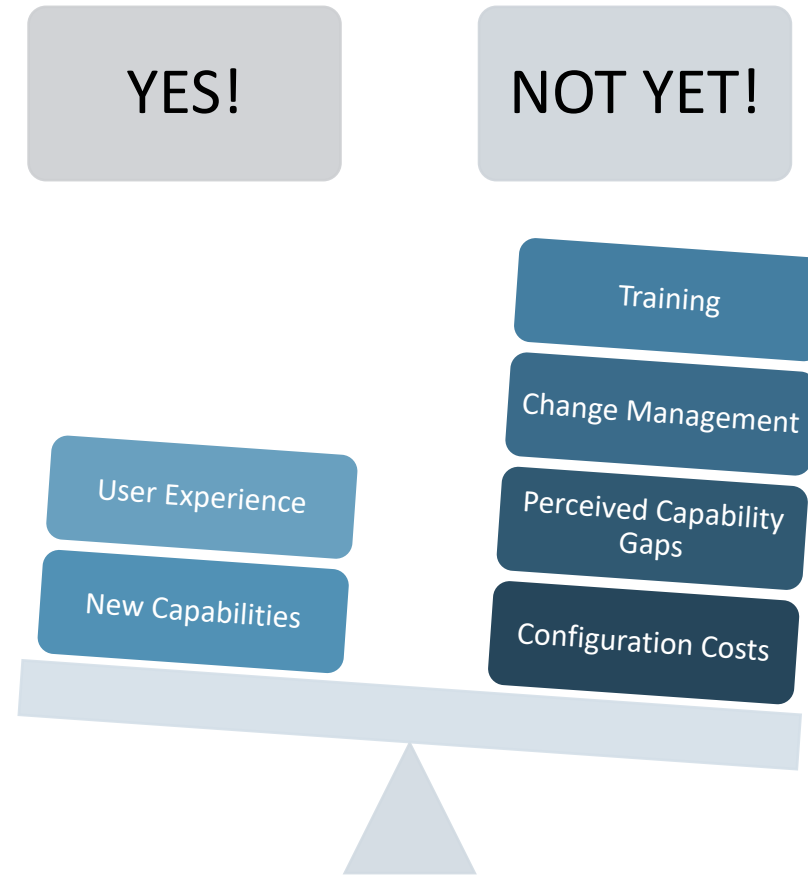
Make the Case

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
 - Field level security
 - Data Visualization - Widgets
- 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
 - Leverage Business Rules to expose the right data at the right time
- 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
- And More
 - Ability to create Custom Investments for better alignment to Corporate needs
 - Agreements, Staff Views, Workforce Modeling, Improved Rally Connections, Improved Mobile Capabilities, Advanced Visualizations

Open Mic

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



Part II: 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 – Considerations

- **Big Bang**

- Shift all modules to the modern UX at once
- Requires training/change management
- Simplified approach with one UI
- Ability to coordinate with a rebranding or re-engineering
- Try to migrate existing modules and introduce something new (e.g., Roadmaps. Hierarchy) to experience the MUX benefits immediately
- Consider other large organization changes that may be happening. Don't overwhelm.
- Very resource-intensive

- **Incremental (recommended)**

- Phased approach by role, module, or group (e.g., move all PMs vs move R&D PMs)
- Controlled training/change management
 - Provides a feedback loop and cultivation of Champions
- 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.



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.

Plan a Pilot to Garner Feedback

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 - Big Bang or Incremental??

- 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.

Example Migration Plan - The Rego Approach

Crawl

Playing in the Sand!

Apply the Phoenix skin to Classic UX to get a fresh look and feel.

Team Members into the Modern UX and utilize Modern UX Timesheets

Portfolio Managers and exec team utilize Roadmapping for strategic planning

Walk

Dive In!

PM's and RM's can toggle between classic and the Modern UX

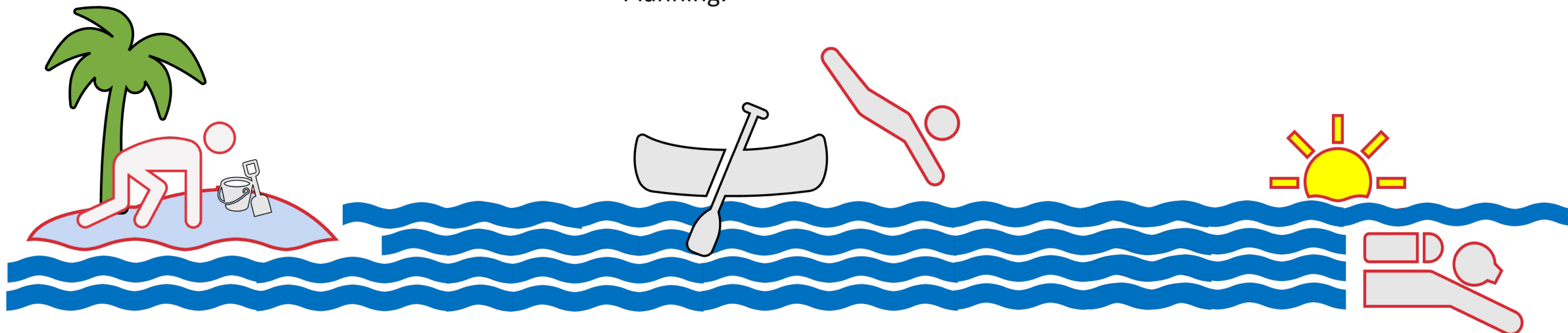
Project Managers into the Modern UX. Utilize channels for custom functionality as necessary

Resource Managers in the Modern UX. Utilize the Staffing module for Planning.

Run

Explore the depths of the ocean!

All Team Members including Project Managers, Resource Managers, and Portfolio Managers are exclusively utilizing the Modern UX with minimal exposure to Classic capabilities (e.g., Pages for portlet-based dashboards, links to Resource List).



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 Detail flyouts.
- Transition Label overrides in Classic Views to Attributes

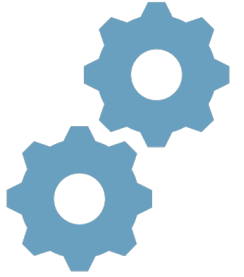
Configure Field Level & User Security



- 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.
- Implement field level security to replace current locking or governance practices

Part III: Tactical Checklist The Basics

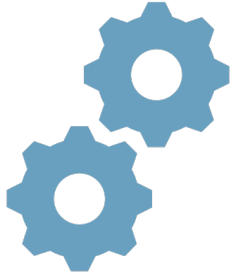
Modern UX Configurations



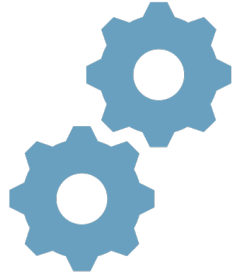
| ID | Activity | Description |
|------|---|--|
| C1.1 | Enable attributes that are to be exposed in the Modern UX with an API ID. | <ul style="list-style-type: none">API ID should follow the convention: 'c_<attribute id>'. This includes OBS attributes as wellOnce set, these should not be modified as it could leave orphaned fields on a blueprint. |
| C1.2 | Update attribute names to align with expected field label | <ul style="list-style-type: none">Either update the Attribute-level field labels, which may or may not match the View-level field labels from Classic, orModify field names in the MUX Administration via the Attributes module |
| C1.3 | Add color mapping to lookups (optional) | <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. |
| C1.4 | Enable investment subobjects for display in the Modern UX. | <ul style="list-style-type: none">Set API Enabled = Yes for all investment subobjects and their attributes that are to be presented as modules (i.e., tabs) in the Modern UX. |

Modern UX Configurations

| ID | Activity | Description |
|------|---|--|
| C2.0 | Evaluate Action Triggers and Existing Processes | <ul style="list-style-type: none">▪ Is Action best initiated as an attribute update or as a user selection from an Action Menu▪ 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 after 16.0.3 for most objects. |
| C2.1 | Evaluate Security | <ul style="list-style-type: none">▪ Refine security groups to leverage investment level Business Rules and Field Level Security |
| C2.2 | NPIOs aka Custom Investments | <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 BUT replacing with a Custom Investment is recommended▪ Consider replacing Programs, Products, Assets or Applications with Custom Investments. |



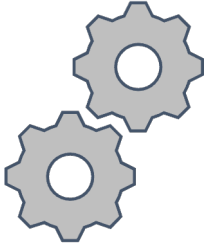
Modern UX Configurations



| ID | Activity | Description |
|------|---|---|
| C3.1 | Establish Blueprints as needed to meet business needs | <ul style="list-style-type: none">▪ Create and configure one or more Blueprints.▪ Start with a copy of the standard Blueprint for OOTB Investment Types▪ Add Modules, Actions, Business Rules, as identified |
| C3.2 | Refine Security Groups and populate field-level security for Investments and Subobjects | <ul style="list-style-type: none">▪ Consider populating Tooltips and Help Text |
| C3.3 | Re-evaluate and 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.▪ Remember to filter out Templates in most User views |
| C3.4 | 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. |

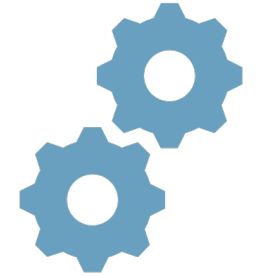
Modern UX Configurations

| ID | Activity | Description |
|------|---|--|
| C4.0 | Review need for “heavy” create screens. | <ul style="list-style-type: none">▪ Re-evaluate the use of create screens in Classic that are loaded with attributes.▪ Given the streamlined, grid-view create process – especially for subobjects like risks, issues, and changes – try to shift to a minimum set of required fields and use the Details flyout to capture additional information. |
| C4.1 | Define and implement channels and/or pages for navigating to Classic functions like Administration, Reports or Dashboards/Portlets not replicable in MUX List Views | <ul style="list-style-type: none">▪ 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> |



Modern UX Configurations

| ID | Activity | Description |
|------|--|---|
| C5.0 | Consider replacing stock action items with MUX action items that have links directly into the Modern UX. | <ul style="list-style-type: none">▪ The stock object-based action items include a link to Classic screens. |
| C51 | 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 Curves▪ Time Slicing Sync▪ Post Actuals to Investment▪ Ensure that Booking Status and Request Status on the Team object have default values.<ul style="list-style-type: none">▪ As necessary, use the OOTB job to convert mixed bookings.▪ Ensure that Booking Status and Request Status on the Team object have default values. |



Part IV

Tips and Tricks

Thoughts Shared from Rego Functional Resources on Migrating to MUX

Modern UX Configurations



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.

Possible Gotchas

- Update Objects and Attribute API data in Production
 - Refresh lower environments with this updated database
 - Eliminates having to do this work in all your environments
- New UX presents Staffing data based on Fiscal Year as a default
 - Classic presented data in a calendar view
- Label changes made in Classic Object Views need to transition to Attribute
- Rethink Auto Start Processes – introduce an action or some triggering attribute to initiate, otherwise the New UX's auto commit will kick off processes unnecessarily

Opportunities to Leverage

- Re-engineer or retire burdensome processes
- Sunset unused attributes
- Replace locking processes with business rules and field level security
- Improve internal perception of Clarity
 - Identify some new capability that will Wow!

New UX User Experiences to Configure

- Leverage capability to create a Home Page for Groups
 - Replacement to Classic Landing page
- Set up Views defined by User Group needs
- Create Pages to Navigate to Jaspersoft or Power BI Reports
- Create Page or Custom Object for Navigation to Classic Administration
 - Keeps Administrators from having to toggle between New UX and Classic
- Expose Classic Portlets with Channels

New UX vs. Classic Gaps (16.1.2)

| Key Items | | |
|--|--------|-------------|
| Overall Items | | |
| Ability to have actions within sub-object edit screen | Medium | 2023 |
| View of Processes, manual execution of processes | Medium | 2023 |
| Investment fields can't be required for only one investment object | Medium | Not Planned |
| Native Portlet/Report placement in Modern vs. Channels | Medium | 2023 |
| Link from a Classic portlet to a Modern UX Investment object | Medium | Rego AddOn |
| Resource Management | | |
| Team Allocations flowing back to Resource Allocations | High | 2023 |
| Project Management | | |
| Add subpages to segregate data entry (vs. Secured fields/section) | Medium | Not Planned |
| Financial Management | | |
| Multi-Currency | High | 2023 |
| Roadmap/Portfolio Management | | |
| No Role-based Targets in Roadmaps | Medium | Rego AddOn |

| Other Items | |
|---|-------------|
| Overall Items | |
| Ability to display icons in list views | Not Planned |
| Migrate blueprints between environments | Rego AddOn |
| Required Fields are not required to save – because saves as you go | Not Planned |
| Object lists do not have an aggregation row (Can add widget) | 2023 |
| Time | |
| Ability to drill into task or project from timesheet to updatefields | Not Planned |
| Ability to quick link for a user to go right to their current timesheet | 2023 |
| Demand Management | |
| Replace Incidents (Master object that a non-FF user can create/edit) | Not Planned |
| Resource Management | |
| Allow multi-resource replacement (1 role filled by many resources) | 2023 |
| Allow Requisitions | Not Planned |
| Project Management | |
| Convert issues to risks to change requests | Not Planned |
| Project Tile View has limited filter options | 2023 |
| Document check in/out + version control | Not Planned |

Summary



- Educate yourself on the latest capabilities of the Modern UX. The perception of gaps from Classic is no longer be valid in most cases.
- 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?



Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



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