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regoUniversity

SAN DIEGO • 2023

Modern UX Administration

Your Guides:

James Gille and Luis Palacios

Introductions

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



Agenda

- Introduction
- Enabling Modern UX, Basic Configuration and Navigation
- Blueprints and Attribute Administration
- Considerations, Recommendations and Rego's MUX Migrator

Introduction

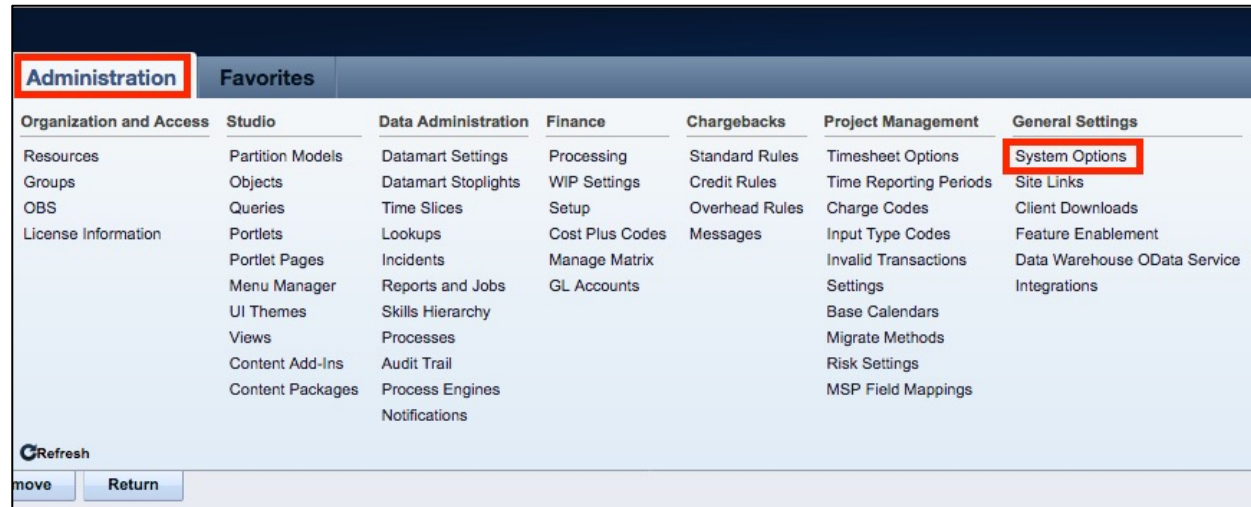
Administration in the Modern UX

- Although it's possible to make use of the Classic UI along with the Modern UX. The product is heavily investing on the Modern UX. Most of the organizations that have recently acquired Clarity are purely relying on this UX
- While some administration activities are done in the Classic Clarity UI, the product is steadily leaning towards having relevant configuration available in Modern UX. Taking a more functional approach to the settings in Modern UX
- Administrators must have a good understanding of what they want to expose and to whom they wish to make functionality available
- As we go through this course, keep in mind the product is being updated on a quarterly basis and new functionality is being added constantly
- We recommend all organizations to remain up to date on the release notes and available webinars that detail the new functionality

Enabling Modern UX, Basic Configuration and Navigation

Activating the Modern UX

- First step is to enable the Modern UX through the Classic UI
 - Go to Administration -> System Options
 - Scroll to the section “New User Experience”
 - Check the options for “Activate New User Experience” and (optional) “Activate Timesheets”
 - For organizations moving from Classic UI, timesheets can remain in the Classic UI but miss out on the latest functionality.



New User Experience

ACTIVATE NEW USER EXPERIENCE



ACTIVATE TIMESHEETS



ENABLE GENERIC CSV IMPORT



(This flag will not impact the 'Import from CSV' action under Roadmaps)

DIRECT PROCESS ACTION ITEM NOTIFICATION LINKS TO NEW USER EXPERIENCE



(This applies to newly generated Action Items for available objects)

PRIORITIZE ACCESS RIGHTS OVER ATTRIBUTE LEVEL SECURITY



SET REPORT DATE TO CURRENT DATE ON PREVIEW



DISABLE CHILD ROW CREATION FOR COST PLAN DETAILS

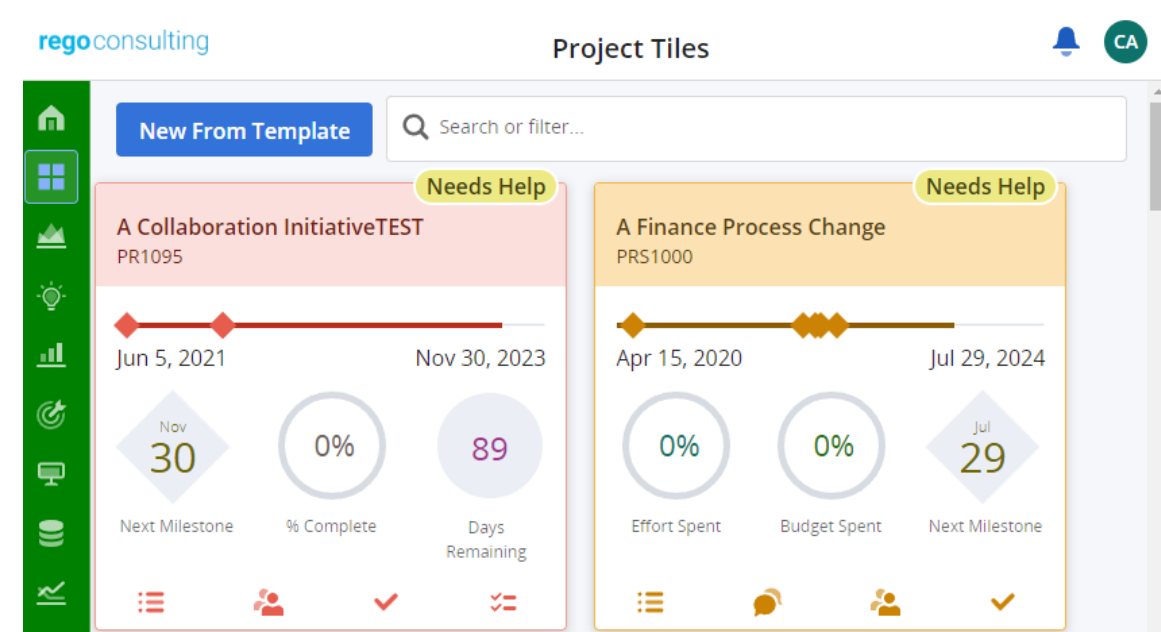


Basic Navigation

- Once enabled, you will have two URLs:
 - Modern UX: /pm
 - Classic UI: /niku
- Highly recommend adding a link on Classic to navigate to the Modern UX

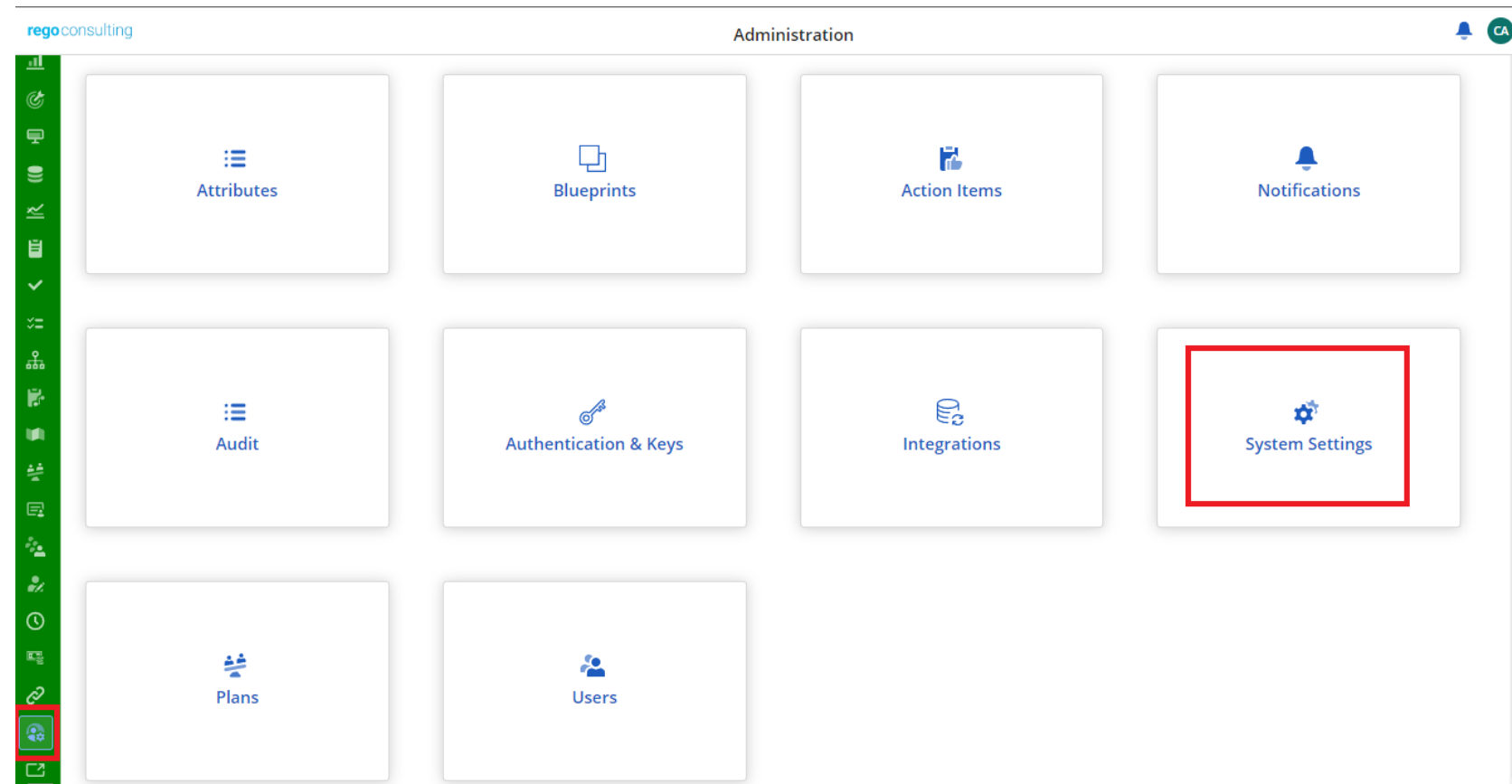
<https://knowledge.broadcom.com/external/article/253271/how-to-create-a-link-to-the-modern-ux-fr.html>

- Once in the Modern UX, the main menu will be available on the left side
- Organizations can also customize the home page in Modern UX by security group (latest versions)



Basic Configuration – Administration Module

- Administrators can access the settings by using the Administration icon on the left side menu
- As part of the first time setup it is recommended to configure:
 - System Settings
 - Blueprints and Attributes
- The Administration module also includes additional settings for:
 - Action Items
 - Notifications
 - API Keys & Integrations
 - User Management
 - Work Plans configuration



Basic Configuration – System Settings

- Under System Settings, Admins will be able to:
 - Configure Theme colors and Logos
 - Create a Login Message, to notify users. Great for reminders, announce maintenance windows, etc
 - Home Page settings, to set a home page within the Modern UX per Clarity Security Group



regoconsulting System Settings

Branding Login Message Homepage

Logo

Header Logo
This logo will appear on a White background. We recommend:

- a dark color logo with a transparent background
- file type: PNG or GIF
- height: 24px, width: 480px (maximum)

Image Tooltip

Delete Upload New Logo

Login Logo
This logo will appear on a dark (or custom) background. We recommend:

- a light color logo with a transparent background
- file type: PNG or GIF
- height: 48px, width: 480px (maximum)

Image Tooltip

Upload New Logo

Theme Colors

Background Color

Default Custom

Background color will appear in left navigation and login screen. The custom value can be in any color format. Examples are: #000, #0362FC, rgba(255, 0, 0, 0.8), hsl(270, 60%, 70%), or just a named web color, like blue.

Foreground Color

Default Light Dark

The foreground color applies to icons and text in left navigation menu.

Basic Configuration – System Settings

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regoconsulting System Settings

Branding Login Message Homepage

Disable Enable Schedule

Start End

Type Severity

Toast Options

Body*

Don't Forget! Status Reports are due by Tuesday at 4 pm central!

Delay Before Dismiss (seconds)

The Toast message will be displayed to all users after login. Toast messages do not block user navigation and page interaction.

Severity - controls the icon and color applied to the message.

Duration - time until message disappears (default 5 seconds).

Basic Configuration – System Settings

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 - Configure Theme colors and Logos
 - Create a Login Message, to notify users. Great for reminders, announce maintenance windows, etc
 - Home Page settings, to set a home page within the Modern UX per Clarity Security Group



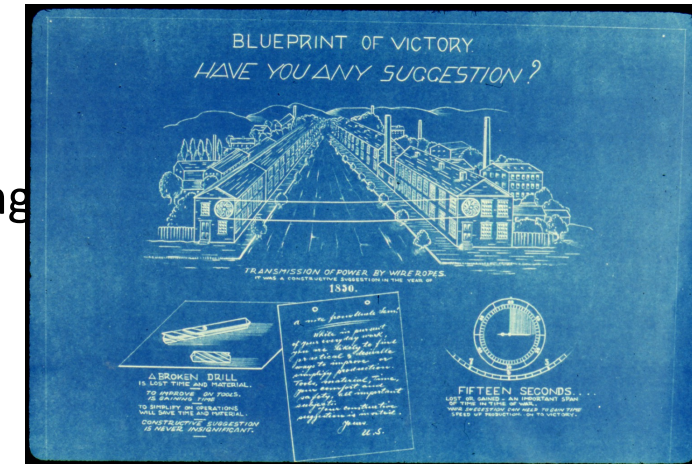
The screenshot shows the 'System Settings' page for 'regoconsulting'. The 'Homepage' tab is selected. The page is titled 'Configure Homepage by access group' and features an 'Add Page' button. Below this is a table with two columns: 'Page' and 'Access Groups'. The table contains three rows: 'My Workspace' with 'View Only' access, and 'First Page in Menu' with 'Default' access. Below the table, there is explanatory text: 'Unique homepages can be configured for different users based on access group. To configure a homepage: select a page (from Clarity system pages or Custom Pages) and assign one or more access groups. Drag-n-drop rows to change priority. If a user belongs to more than one access group, they will see the first page in the list. Users not in any of the configured access groups will see the Default page at login.'

Page	Access Groups
My Workspace	View Only
First Page in Menu	Default

Blueprints and Attribute Administration

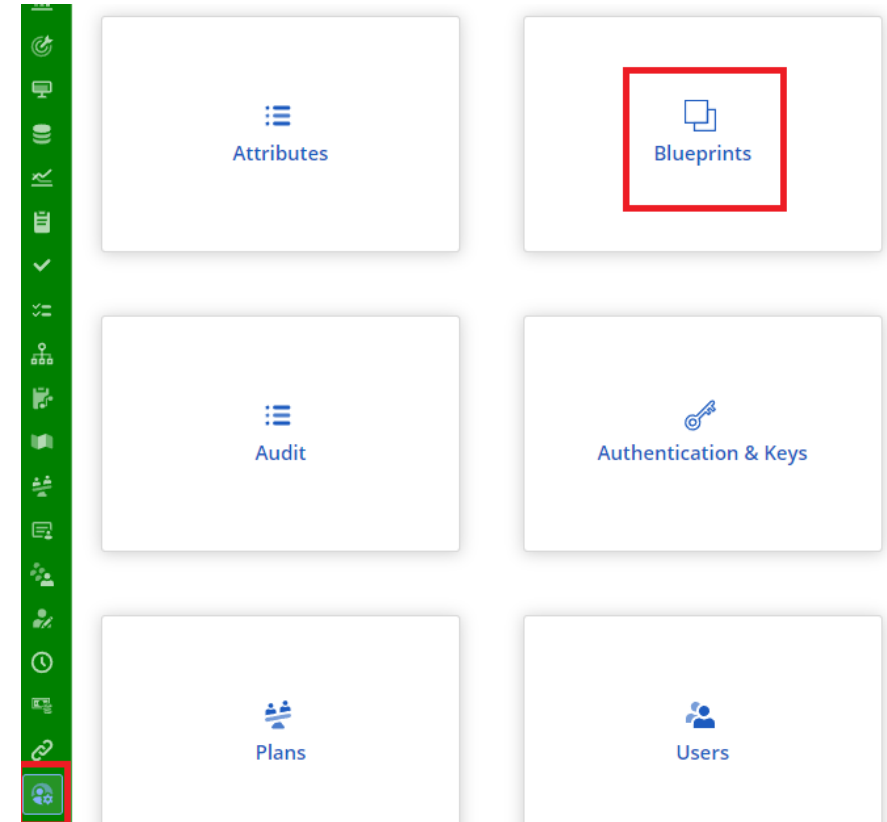
Overview

- Blueprints are configurable layouts in the New User Experience for Ideas, Projects, Custom Investments, Custom Objects and some MUX modules
- Allow Users to see the right data at the right time, for the right work
- They can be assigned to specific instances by: using templates, manually or using processes
- Blueprints allow you to set on a per object basis:
 - Properties View
 - Create from template layouts (investments)
 - Visuals (Projects)
 - Modules and Channels
 - Rules
 - Actions
- Depending on the Clarity version, you can use a Blueprint to configure the Details tab and Custom subobjects (2nd and 3rd level) or Links.



Navigation

- To have the ability to view and update Blueprints, a user requires the following security rights (assigned through Classic UI)
 - 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 List View

- See a list of all the Blueprints that have been created in the system
- Filter and navigate to a specific Blueprint, or perform an action:
 - 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.
- To start a new Blueprint, copy the default or existing Blueprint. (Standard Blueprints can't be modified)

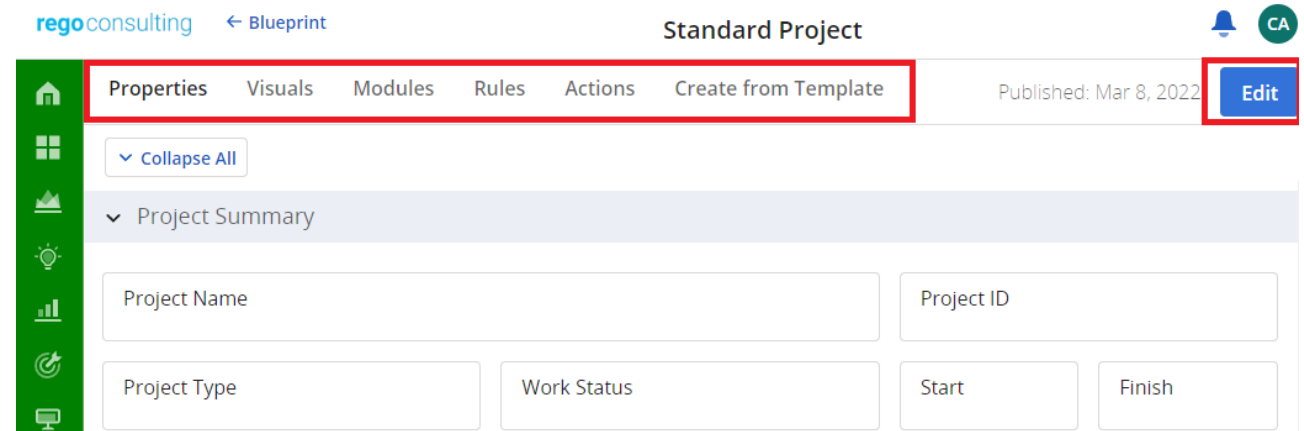
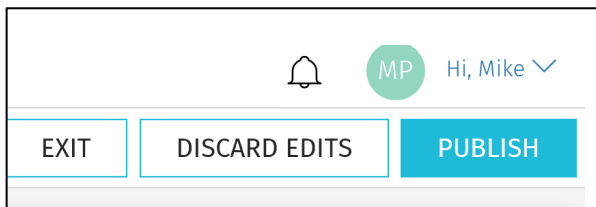
The screenshot displays the 'Blueprint List View' interface. At the top, there is a search bar and a filter bar showing 'Match Filters: All Any Add Filter Groups' and 'Type = Project'. Below the filter bar, there are 'Select All' and 'Deselect All' options. The main area is a table with columns: Name, Type, Status, De..., Standard, and Published By. The table lists various blueprints, with the first one, 'A Corporate', selected. A context menu is open over the first row, showing options: 'Open Details', 'Star', 'Make Default', 'Copy', 'Delete Row', and 'Chart Range (beta)'. The interface also includes navigation arrows, a 'View (Copy) Standard View' dropdown, and a 'Save' button.

Name	Type	Status	De...	Standard	Published By
<input type="checkbox"/> A Corporate	Project	Published	<input checked="" type="checkbox"/>		RegoLink MS Ecosy...
<input type="checkbox"/> Agile Bluep	Project	Published			Administrator, Clar...
<input type="checkbox"/> Corporate E	Project	Published			Administrator, Clar...
<input type="checkbox"/> Demand	Project	Published			Administrator, Clar...
<input type="checkbox"/> Executive P	Project	Published			Administrator, Clar...
<input type="checkbox"/> IT	Project	Published			Gille, James
<input type="checkbox"/> IT with AIR	Project	Published			Pokorny, Mike
<input type="checkbox"/> Marketing Group	Project	Published			Administrator, Clar...
<input type="checkbox"/> Mergers & Acquisitions	Project	Published			Administrator, Clar...
<input type="checkbox"/> Modern Business Management	Project	Published			Administrator, Clar...
<input type="checkbox"/> New Product Management	Project	Published			Administrator, Clar...
<input type="checkbox"/> Projects with Business Case	Project	Published			Administrator, Clar...

Blueprint Configuration

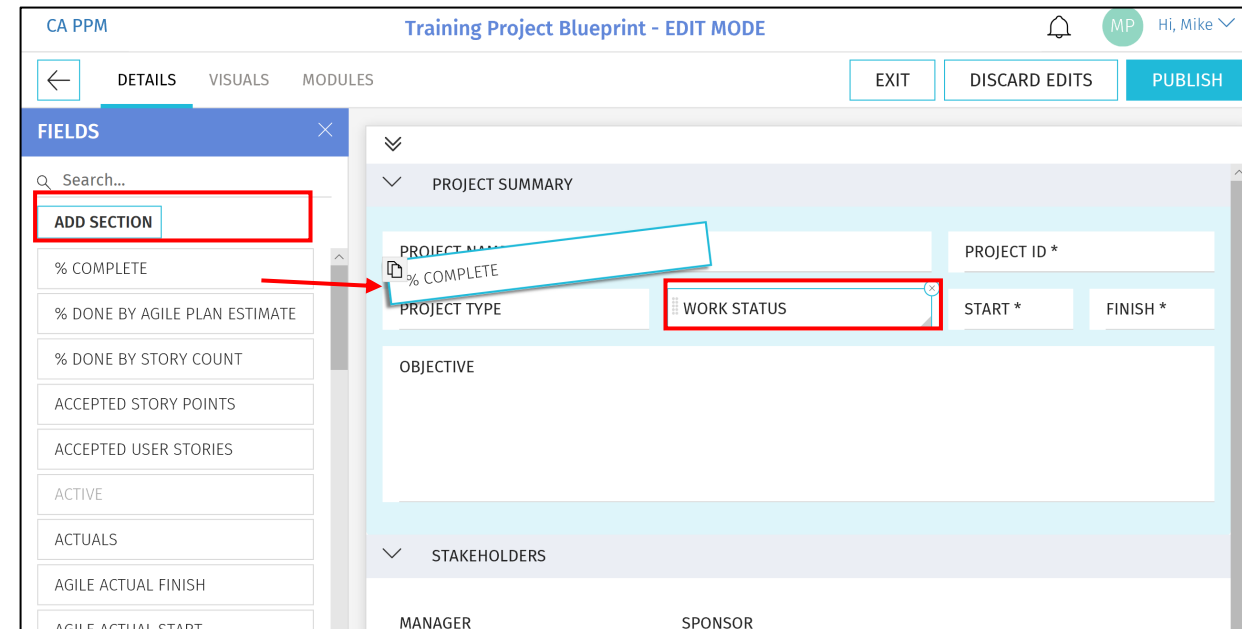
Blueprint Properties

- Using a Project Blueprint as an example, the properties view will allow you to configure the following: (We will go more in-depth later on these topics.)
 - Properties – Defines the properties pane of the object. Admins can configure “Sections” and “Attributes” by dragging, dropping and resizing accordingly.
 - Visuals – Define the icons on the Project Tiles view. (Only available for Project Blueprints)
 - Modules – Supporting “tabs” that can be added or removed from the Blueprint. The modules include functionality like Financials, Teams, Risk, Issues, Changes, Custom Sub-Objects and/or Channels.
 - Rules – Create business rules to control how end users are engaged, when a rule is met it will perform actions like showing or hiding fields/sections
 - Actions – Create actions to allow end users to execute a process, admins can control when this actions are available.
 - Create from Template – Similar to the properties page, allows admins to add or remove fields for the create from template properties view
- By default the Blueprint is on “View Only” mode. Clicking on “Edit” mode will allow admins to perform changes and publish afterwards.



Properties

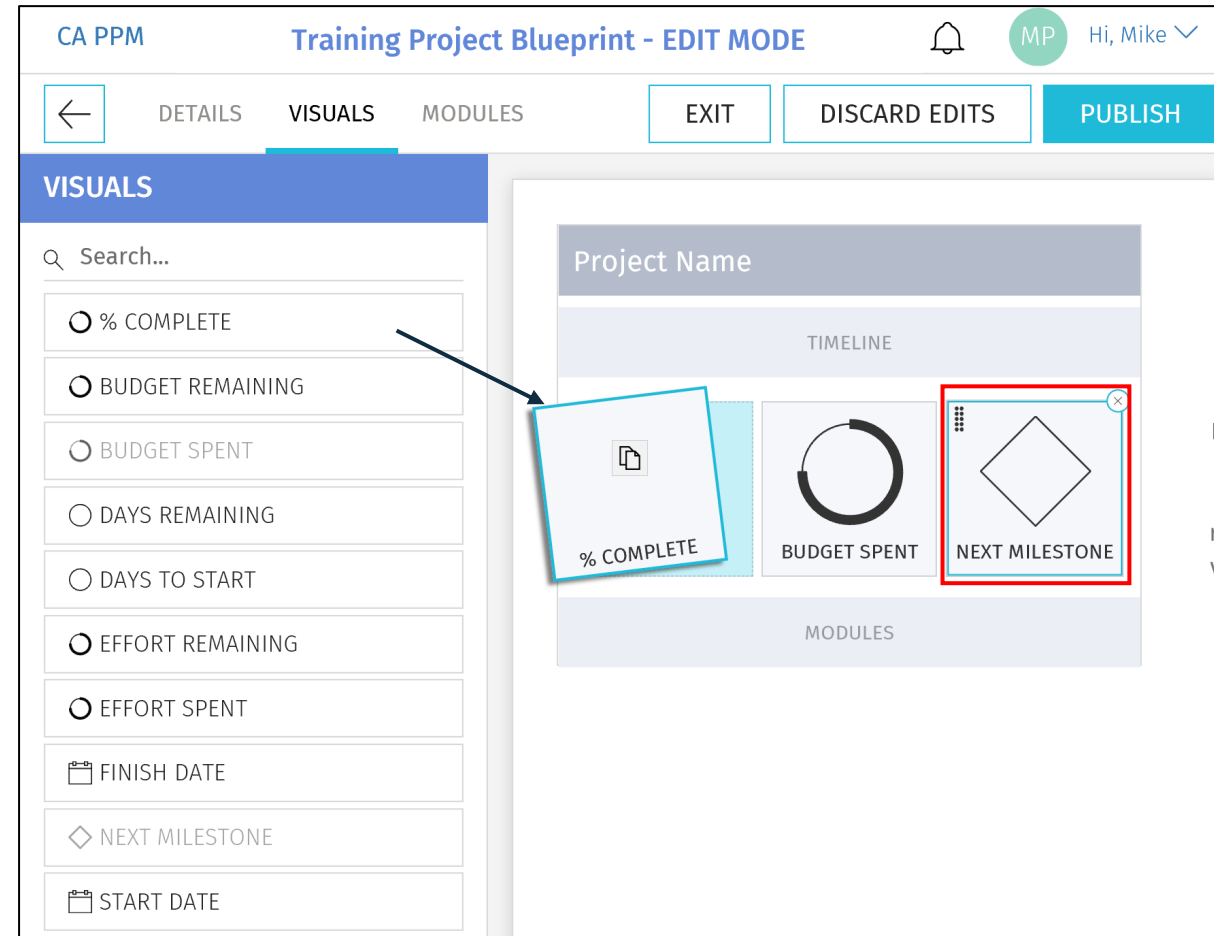
- Fields Pane
 - Provides list of fields that can be added:
 - By default, it contains a list of out-of-the-box Project and Investment fields
 - Custom fields can be added (As long as the field has an API Alias)
 - Fields that already exist on your Blueprint are greyed out
- Layout
 - Click the Add Section button to add a new section to the Details
 - 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)

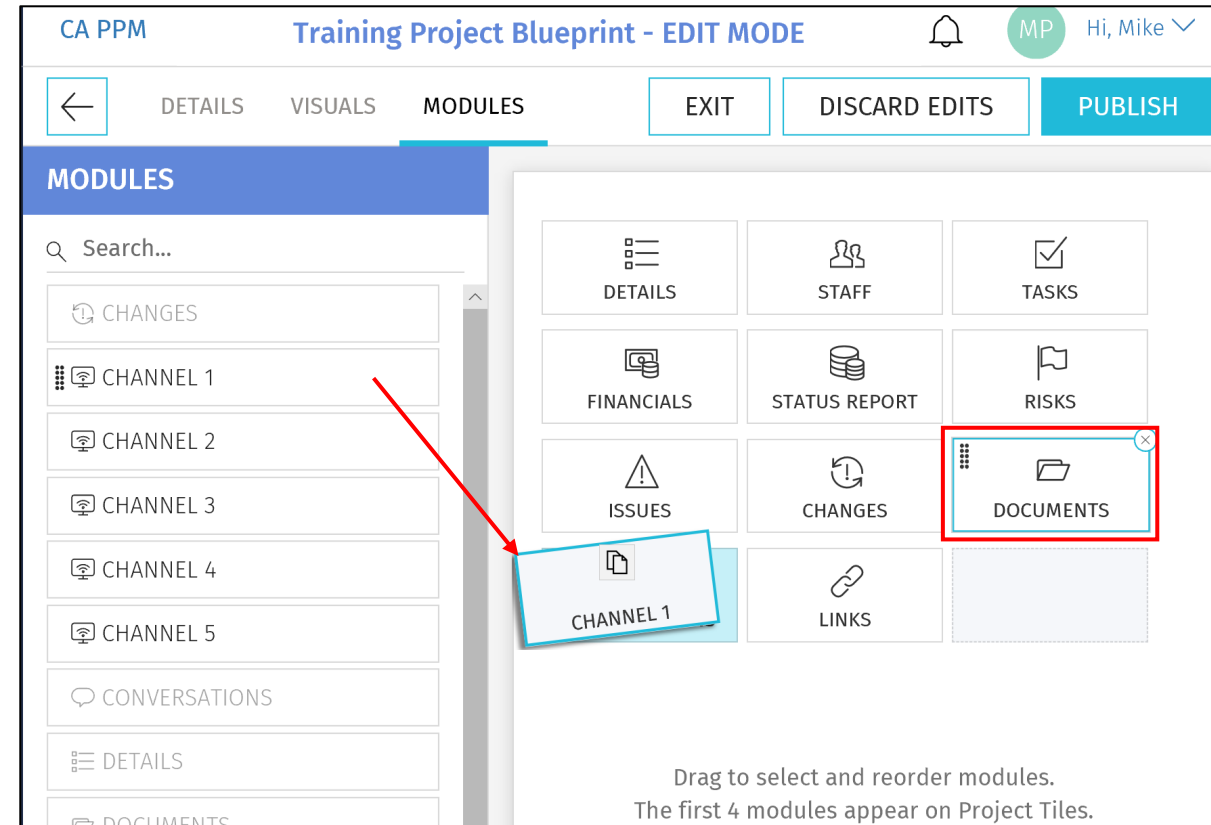
Visuals (Projects Only)

- Visuals are displayed on the Project Tiles view
- 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
- Links for the first 4 configured modules will be displayed below the visuals



Modules

- Configured Modules are displayed across the top tabs for end users as they navigate into Properties view
- There are several 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
 - Ability to add custom sub-objects (only if the sub-object is API Enabled)



Modules – Channels

- Channels are configurable Modules which embed: Classic UI URLs (recommend Phoenix Theme and relative URLs) or External Applications.
- Users can stay directly in Clarity and get the additional pertinent information
- Configuration
 - Channel Name
 - Channel URL
 - Referrer and SSO Configuration
 - Use attributes as parameters for the URL

The image displays two screenshots from the CA PPM interface. The top screenshot shows a project plan for 'ACME Project' with a table of tasks and a Gantt chart. The bottom screenshot shows the 'Training Project Blueprint - EDIT MODE' interface, where a 'MODULES' list includes 'CHANNEL 1' through 'CHANNEL 5'. A 'Configure - Smartsheet' dialog box is open, showing the configuration for a Smartsheet channel.

Task Name	Duration	Start	Finish	% Complete	Staffing Size	Status	As
- Initiation	14d	12/28/15	01/14/16	100%			
Detailed Requirer	6d	12/28/15	01/04/16	100%	4	Green	Mike
Hardware Requir	5d	01/05/16	01/11/16	100%	4	Blue	Ed
Final Resource P	2d	01/12/16	01/13/16	100%	4	Yellow	Ba
Staffing	1d	01/14/16	01/14/16	100%	4	Yellow	Ed
- Development	13d	01/14/16	02/02/16	24%			
Technical Requir							
Database Develo							
API development							
UI Client develpr							
- Testing							
Operations							
Hardware procure							
Hardware configu							
System Testing							
- Launch							
Deployment Test							
Perf and Scalabili							

Configure - Smartsheet

CHANNEL NAME *
Smartsheet PREVIEW

CHANNEL URL *
<https://app.smartsheet.com/b/publish?EQBCT=xxxxxxxxxxxx>

REFERRER URLS
Comma Separated

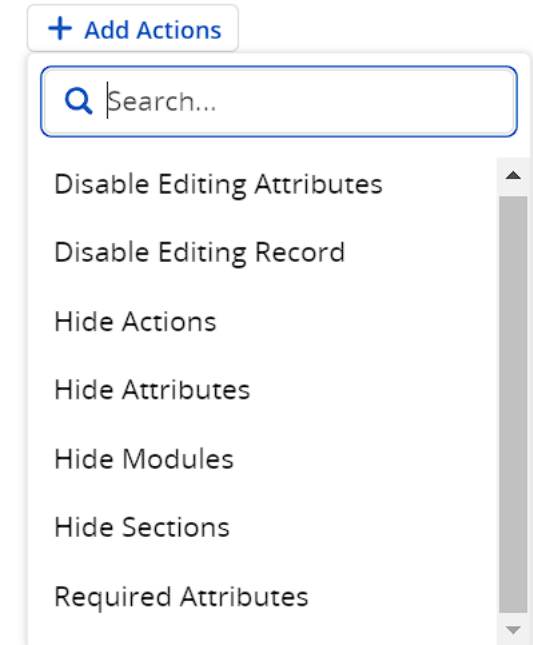
Modules – Custom Sub-Objects

- 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
- Depending on the Clarity version, newer functionality is available:
 - Exposing 2nd and 3rd level sub-objects
 - Configuring “Properties pane” for the sub-objects

The screenshot displays the configuration interface for a custom sub-object. The top section shows the 'Subobject' configuration with the 'Master Object' set to 'Project'. 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 this, the 'Properties' pane is visible, showing the 'Object Name' as 'Test Sub Object', 'Object ID' as 'test_sub_prj_obj', and 'API Attribute ID' as 'custTestSubPrjObjs', which is also highlighted with a red box. The 'Content Source' is set to 'Description'. At the bottom, a navigation bar shows a grid of modules, with 'TEST SUB OBJECT' highlighted in a red box.

Rules

- Rules in the Modern UX allow the administrator apply conditional logic that apply the action when met to a specific blueprint
 - Disable Editing Attributes: Disable specific attributes to be edited
 - Disable Editing Record: Disable the entire record from being edited
 - Hide Actions: Disable an action from being used
 - Hide Modules: Disable specific tabs/channels from appearing to the user
 - Hide Sections: Disable sections from appearing on the page
 - Required Attributes: Require specific attributes. *(New to 16.1.3)
 - Note: This does not work on Rich Text Fields



How to Create a rule

- Select the Rules Tab
- Select New button
- Fill out the following:
 - Name: A meaningful title
 - Description: Add as much detail to understand and manage the rule
 - Target Object: This is where the rule will be applied. This can work on any sub object of the blueprint object.
 - Rule Type: This defines when the logic should occur.
 - Conditions: Fill out a condition that needs to occur to apply your action
 - Actions: Setup the various actions you want applied when the conditions are met.
- Select Create

New Rule
✕

Rule Name*

Target Object

Description

Enter the rule description

Rule Type
 Determine when the below actions are executed. Only one rule type may be selected per business rule.

View Page - *Runs every time a user views page, supports only one complex condition (UI action Only)*
 Attribute Update - *Run only when a selected attribute is updated, supports multiple conditions blocks (Data and UI actions)*

Conditions Always True

Match Filters All Any

[+ Add Filter](#) Remove All

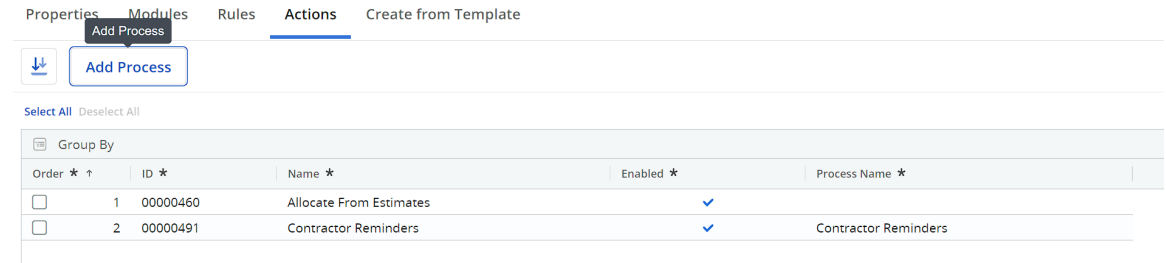
Actions

↳ Required Attributes [+ Select](#)

[+ Add Actions](#)

Actions

- Actions allow a user to kick off a process on demand.
- Security needs to be done on the rule side of the blueprint
- Processes can be specific to the object OR non-object associated processes.



Order *	ID *	Name *	Enabled *	Process Name *
<input type="checkbox"/>	1 00000460	Allocate From Estimates	✓	
<input type="checkbox"/>	2 00000491	Contractor Reminders	✓	Contractor Reminders

Create from template

- Create from template defines the Properties View when using Templates. This will allow for required attributes and additional attributes to be prompted to end users.

clarity



New From Template

New Project

Investment name *

Start * Finish *

Sep 8, 2023 Sep 8, 2023

Cancel Create

Canvas

- Introduced in 16.1.0 (previously used for Status Reports only), the canvas functionality allows you to create a new module that can be configured with fields from the master and sub objects
- Canvas allow grids, fields and widgets to provide Dashboard like experience to end users
- Canvas has 3 different layouts:
 - 4 columns: Good for a small display
 - 6 columns: Good for a medium sized display
 - 8 columns: Good for a dashboard sized display

The screenshot displays the 'Configure Canvas' interface, which is used to build a dashboard. On the left, there is a 'Widgets' panel with a search bar and several widget options: Number Tile (100), Progress Ring (67%), Pie Chart, Bar Chart, and Table (2). Below these are several pre-configured widget templates like 'aaatest Goal', 'AC Test', 'Active', 'Actuals Sum for Labor Resou...', 'Additional Deliverables', and 'Alignment'. The main canvas area shows a dashboard layout with three columns. The first column contains a 'Count of Tasks' widget displaying the number '2' and a 'Task List' table. The second column contains an 'Objectives Risk' widget. The third column contains a 'Full Description' widget, 'Budgeted Cost' and 'Planned Cost' widgets, and a 'Staff' table. The 'Task List' table has the following data:

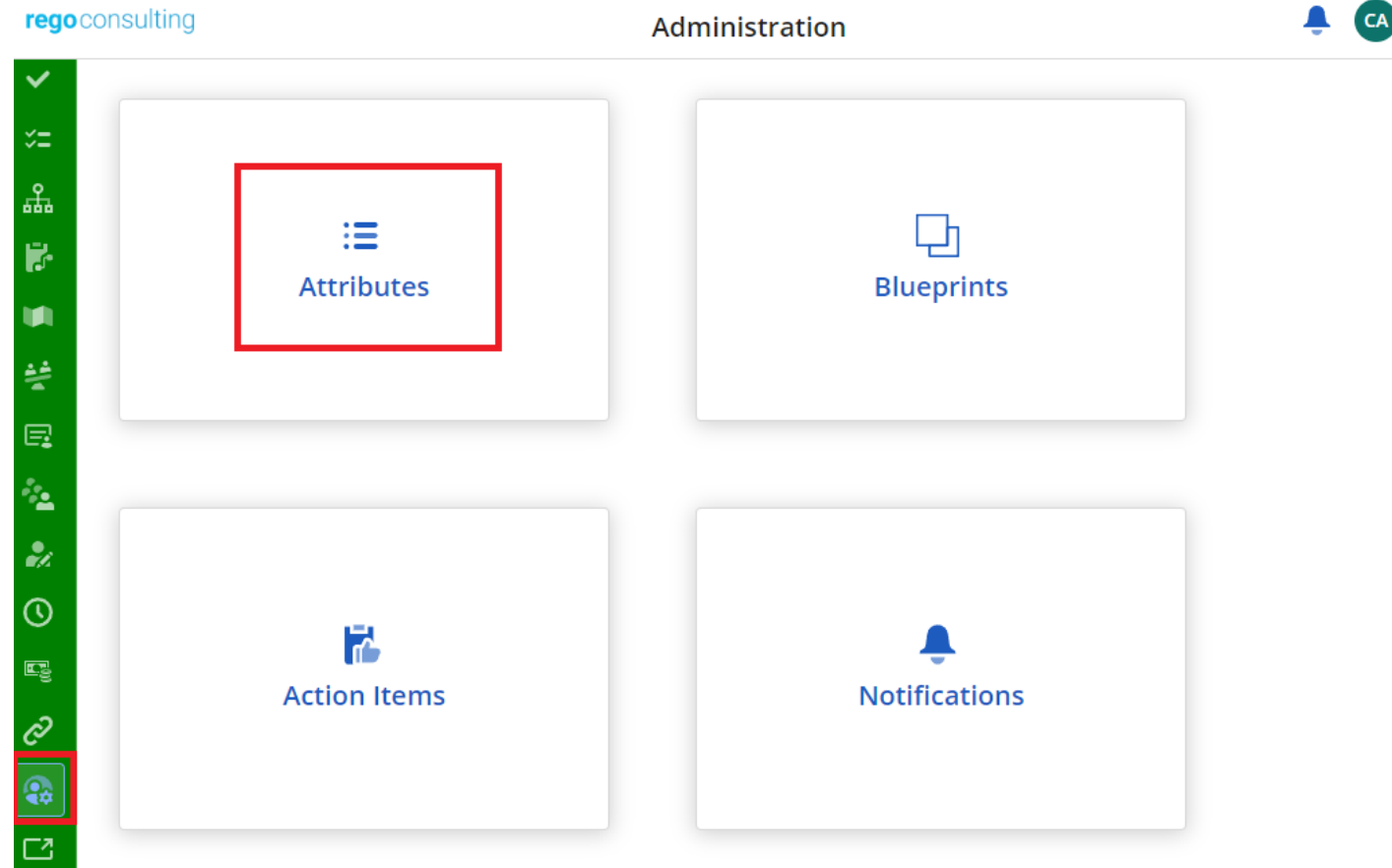
Name *	Start *	Finish *
Story 1	Sep 8, 2023	Sep 8, 2023
Story 2	Sep 8, 2023	Sep 8, 2023

The 'Staff' table shows 'No Rows To Show'. The interface includes a 'Done' button in the top right corner.

Attribute Administration

Attributes

- Attributes admin module, allows admins to:
 - Use as a Attribute Dictionary - View the fields available in the application and key properties like the api id, database table, etc.
 - Configure Field Level Security (FLS)
 - Configure Labels and Tooltips
 - Configure Investment Parents to manage the “parent” field



Attributes

- To configure FLS, admins will need to:
 - Enable the Secure checkbox for a given attribute
 - Select the security group for Edit and View access
 - Take into account this also impacts the API
- Admins can also modify the Label of a field to change its title in Modern UX, to setup regionalization an admin must change their language, log out/in to the Clarity and update accordingly
- Admins can also set a Tooltip to display when end users mouse over the attributes

Attributes Investment Parents

← ↓

Search... View (Copy) Standard View Save ⚙

Match Filters All Any Add Filter Groups

Object = Project x + Add Filter Remove All

Group By

Attribute ↑	Attribute ID	Object ▾	Secure	Access Edit	Access View	Database Table	Database Column	Ac...	Label	Description	Tooltip
% Complete	percent_complete	Project				inv_projects	percent_complete	✓		Percent Complete	Percent Complete ...
% Complete Calculatio...	percent_calc_mode	Project				inv_projects	percent_calc_mode	✓		Percent Complete ...	Percent Complete ...
% Done By Agile Plan E...	agl_pctdon_plest	Project				odf_ca_project	agl_pctdon_plest	✓		% Done By Agile Pl...	% Done By Agile Pl...
% Done by Story Count	agl_pctdon_stc	Project				odf_ca_project	agl_pctdon_stc	✓		% Done By Story C...	% Done By Story C...
AC Initiative ID	r_initiative_id	Project				odf_ca_project	r_initiative_id	✓		Rally Initiative ID	Rally Initiative ID
AC Initiative Link	r_initiative_link	Project				odf_ca_project	r_initiative_link	✓		Rally Initiative Link	Rally Initiative Link
AC Initiative Name	r_initiative_name	Project				odf_ca_project	r_initiative_name	✓		Rally Initiative Name	Rally Initiative Name
AC Last Sync Date	r_last_sync_date	Project				odf_ca_project	r_last_sync_date	✓		Rally Last Sync Date	Rally Last Sync Date
AC Project	r_ac_project	Project				odf_ca_project	r_ac_project	✓		Rally Project	Rally Project
AC Risk Score	r_risk_score	Project				odf_ca_project	r_risk_score	✓		Rally Risk Score	Rally Risk Score
AC Sync Features	r_import_epic_featur	Project				odf_ca_project	r_import_epic_featur	✓		Rally Sync Features	Rally Sync Features
Accepted Story Points	agl_acp_stypts	Project				odf_ca_project	agl_acp_stypts	✓		Rally Accepted Stor...	Accepted Story Poi...
Accepted User Stories	agl_acp_usrsty	Project				odf_ca_project	agl_acp_usrsty	✓		Rally Accepted Stor...	Accepted User Stor...

Columns

Details

Attributes

- Introduced in 16.1.2, admins can also configure Parent/Child relationships for the parent field by associating two investment types
- By doing this, end users will only be able to select a parent with the type matching the allowed parents

The screenshot shows a configuration page for 'Investment Parents'. At the top, there are two tabs: 'Attributes' and 'Investment Parents', with the latter being the active tab. Below the tabs, the text reads 'Set the allowed parent types of investments'. There is a button labeled 'Add Investment Type'. Below this is a table with two columns: 'Investment Type' and 'Allowed Parent Types'. The table contains one row with 'Applications' under 'Investment Type' and 'Solutions' under 'Allowed Parent Types'. Below the table, there are three paragraphs of explanatory text.

Attributes Investment Parents

Set the allowed parent types of investments

[Add Investment Type](#)

Investment Type	Allowed Parent Types
Applications	Solutions

By default the Parent attribute displays all Investment Types.

Adding an Investment Type here allows you to restrict the Investment Types that display in the Parent attribute to only the Parent Types selected.

Leaving the Allowed Parent Types blank prevents assigning a parent to investments of that type.

Considerations, Recommendations and Rego's MUX Migrator

Considerations and Recommendations

- Align Modern UX with your business process by implementing:
 - Templates for Investment creation
 - Blueprints to match different types of investments
 - Use CITs for other type of investments
- Tailor the experience and security by using:
 - Security Groups, OBS and Access Rights
 - Use Business Rules and Field Level Security (FLS) to show, hide or protect fields
- Remember Modern UX is highly personalizable by end users, they will be able to create their own: Views, Minor settings, Picklists, etc
- Look for areas of improvement to increase adoption, collaboration or improve the overall use:
 - Keep up to date on the releases
 - Improve productivity and collaboration with: TO Do's, Workspace Module, Conversations, Action Items and Notifications
 - Improve navigation by using channels, widgets and more advanced UI configuration
- Stay relevant and review the functionality on new versions as the product continues to invest on the Modern UX

Rego Assets and Innovations – MUX Migrator

- Moving Modern UX configuration between environment is normally done manually.
- MUX Migrator allows administrators to move: Blueprints, Views, FLS and other configuration seamlessly. Allowing admins to pick and choose the desired configuration

clarity ← MUX Migrator

MUX Migrator Video
MUX00000010

Properties

▼ Collapse All Populate Stage Content

▼ Summary

Name * MUX Migrator Video Integration Approach * Source to Target Environment Content Populated Process Status Not Processed

Description Q1 Release Process Message

▼ Environment Credentials

Source Environment URL User Name Password

Properties MUX Configuration

↓

Select All Deselect All

Group By

Content Type *	Object	Content To Be Migrated
<input type="checkbox"/> FLS Security	Roadmap	
<input type="checkbox"/> View	Project	Active Projects Planned Cost
<input type="checkbox"/> Blueprint	Project	Project - Research

Questions?



Surveys

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



Thank You For Attending Rego University

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