



regoUniversity

KANSAS CITY • 2024

Modern UX Administration

Your Guides:

David Zywiec and Chris Ciavarella

Platinum Sponsor

ValueOps
by Broadcom

Rally **Clarity**
by Broadcom by Broadcom

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 in 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

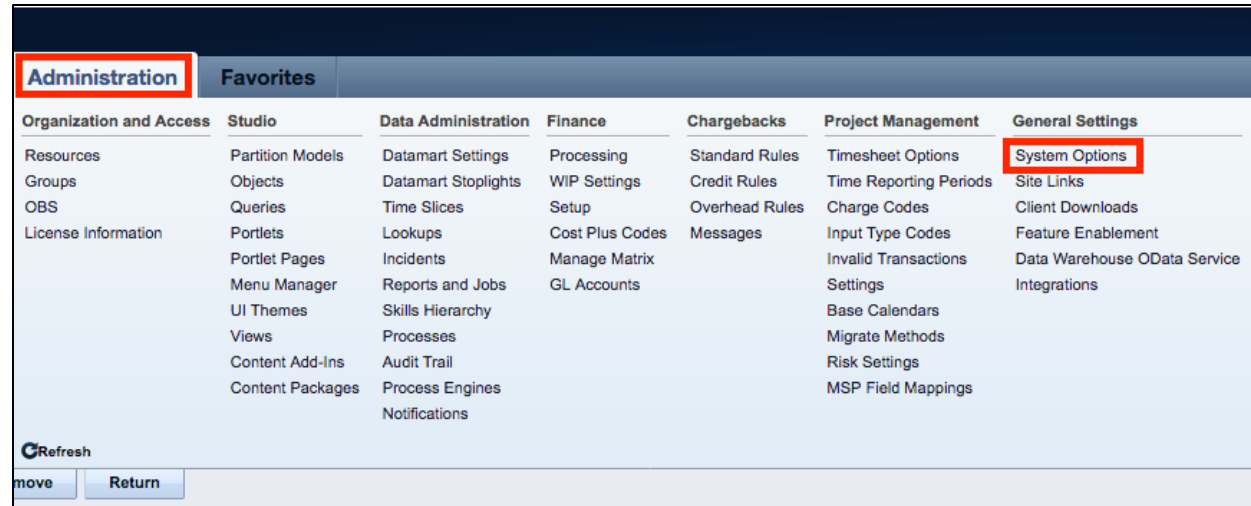


regoUniversity

KANSAS CITY • 2024

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

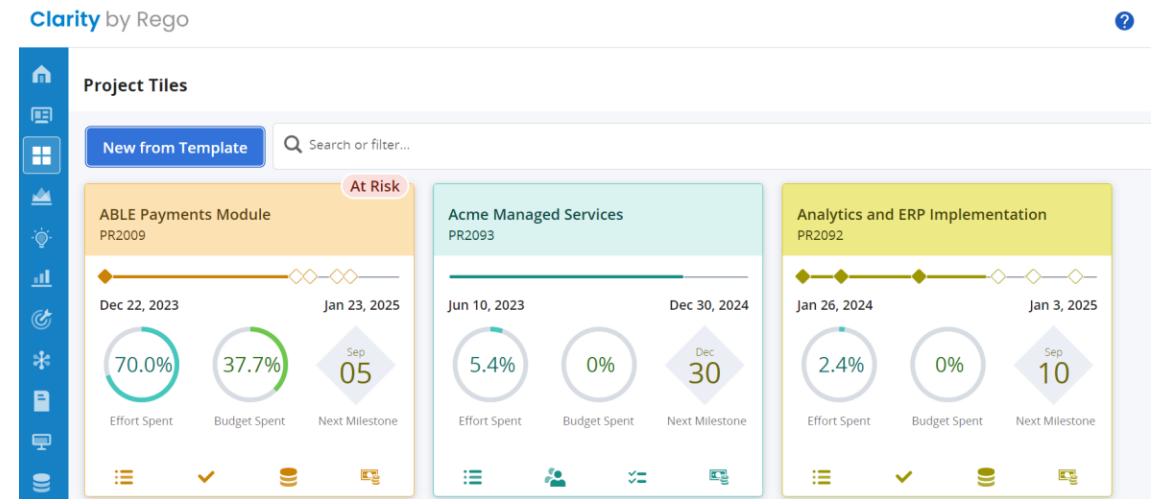


DISABLE CHILD ROW CREATION FOR COST PLAN DETAILS



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
- 16.2.3 Allows grid customization
 - Screenshot shown

Administration

Resource Management

Skills

Investment Management

Action Items

Actions

Attributes

Blueprints

Notifications

Views

Basic Admin

Audit

Timesheets

Users

Staffing

Plans

Nerdy Areas

System Settings

Authentication & Keys

Integrations

Feature Toggles

Clarity Concierge Beta

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
 - Navigation Menu, to set the navigation bar on the right icons and enable/disable modules
 - User Defaults, to set the default unit of measure for users



System Settings

Branding | Login Message | Homepage | Navigation Menu | User Defaults

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

Clarity 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 #1580c4

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

- 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
 - Navigation Menu, to set the navigation bar on the right icons and enable/disable modules
 - User Defaults, to set the default unit of measure for users



System Settings

Branding **Login Message** Homepage Navigation Menu User Defaults

Disable Enable Schedule

Start

End

Type

Toast

Severity

Attention

Toast Options

Body*

WELCOME TO CLARITY 16.1.2 GA

Delay Before Dismiss (seconds)

5

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

- 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
 - Navigation Menu, to set the navigation bar on the right icons and enable/disable modules
 - User Defaults, to set the default unit of measure for users



System Settings

Branding Login Message **Homepage** Navigation Menu User Defaults

Configure Homepage by access group

[Add Page](#)

Page	Access Groups
Value Stream Financials	Modern UX Executives
Staffing	Modern UX RM
My Work	Modern UX DL
Roadmaps	Modern UX CWM Manager; Modern UX PdM
First Page in Menu	Default

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.

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
 - Navigation Menu, to set the navigation bar on the right icons and enable/disable modules
 - User Defaults, to set the default unit of measure for users



System Settings

Branding Login Message Homepage **Navigation Menu** User Defaults

Configure main Navigation Menu

[Add Page](#)

	Page	Icon	Show
	Home		<input checked="" type="checkbox"/>
	Executive Dashboard		<input checked="" type="checkbox"/>
	Project Tiles		<input checked="" type="checkbox"/>
	Projects		<input checked="" type="checkbox"/>
	Ideas		<input checked="" type="checkbox"/>
	Investments		<input checked="" type="checkbox"/>
	Objectives		<input checked="" type="checkbox"/>
	Value Streams		<input checked="" type="checkbox"/>
	Programs		<input checked="" type="checkbox"/>
	Pages		<input checked="" type="checkbox"/>
	Custom Objects		<input checked="" type="checkbox"/>
	Status Reports		<input checked="" type="checkbox"/>
	Rego Power BI		<input checked="" type="checkbox"/>
	My Workspace		<input checked="" type="checkbox"/>
	Tasks		<input checked="" type="checkbox"/>
	To Dos		<input checked="" type="checkbox"/>

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
 - Navigation Menu, to set the navigation bar on the right icons and enable/disable modules
 - User Defaults, to set the default unit of measure for users



System Settings

Branding Login Message Homepage Navigation Menu **User Defaults**

All users will be given these settings. Users who have personalized their settings will not be affected.

Unit Of Measure

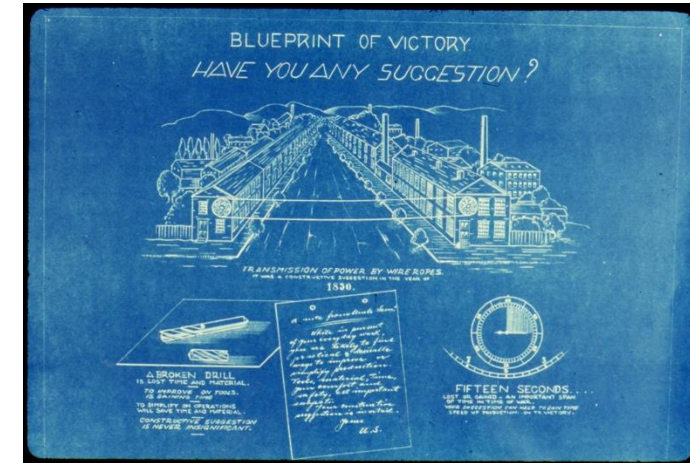
FTE Hours Days % Availability

Blueprints and Attribute Administration



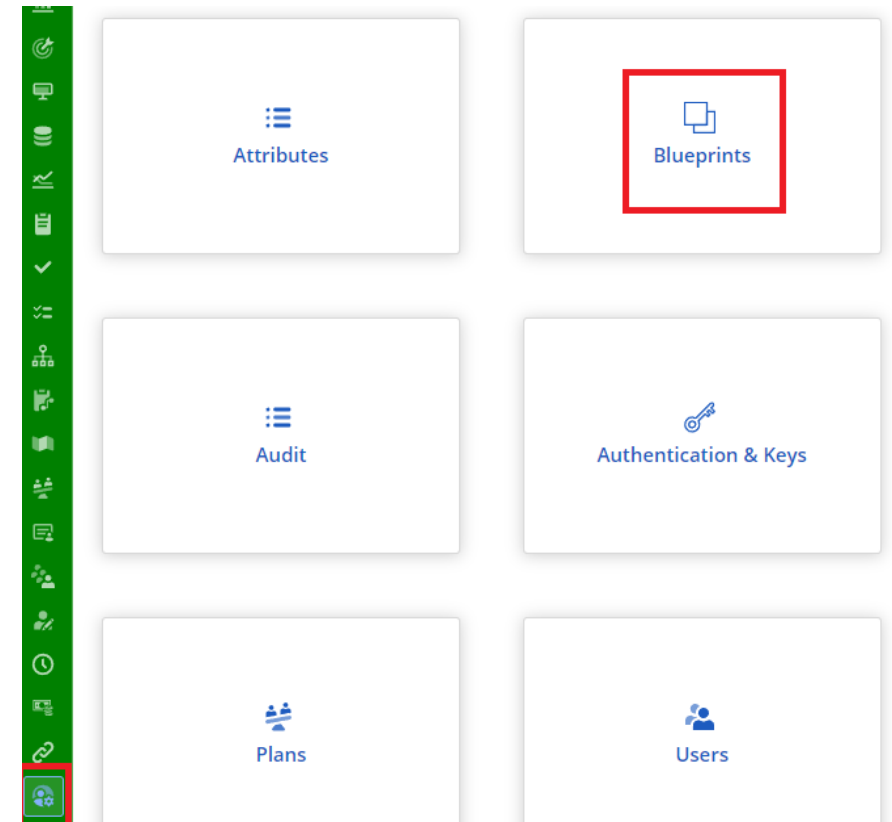
Overview

- 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.)

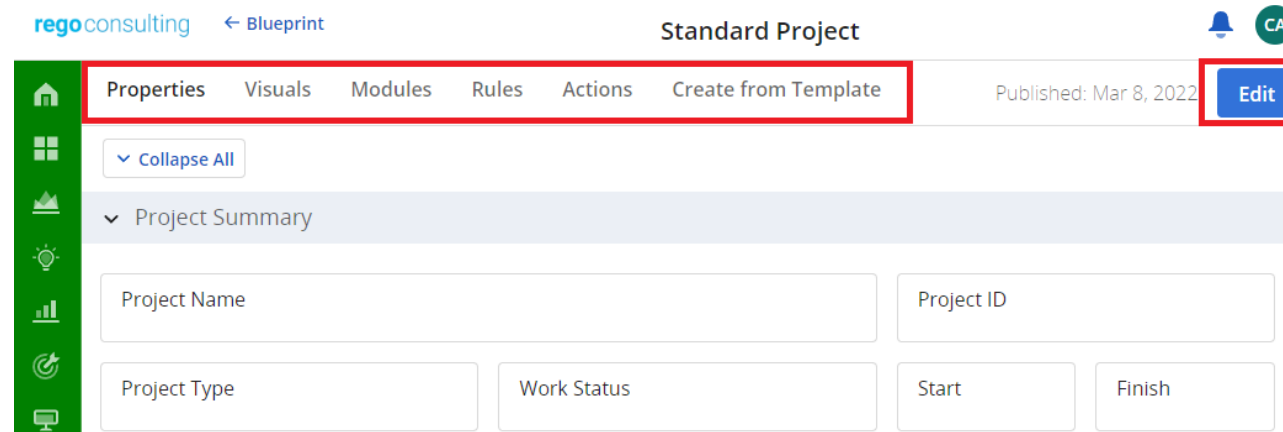
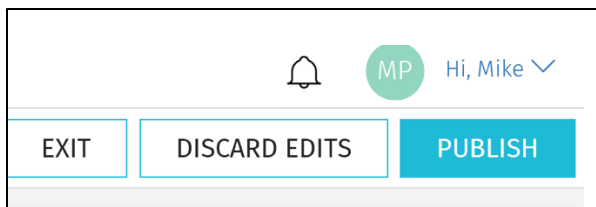
The screenshot displays the 'Blueprint List View' interface. At the top, there is a search bar and a view selector set to '(Copy) Standard View'. Below this is a 'Match Filters' section with 'Type = Project' selected. The main area is a table with columns: Name, Type, Status, De..., Standard, and Published By. A context menu is open over the first row, showing options: Open Details, Star, Make Default, Copy, Delete Row, and Chart Range (beta). The table lists various blueprints such as 'A Corporate', 'Agile Bluep', 'Corporate B', 'Demand', 'Executive P', 'IT', 'IT with AIR', 'Marketing Group', 'Mergers & Acquisitions', 'Modern Business Management', 'New Product Management', and 'Projects with Business Cas'.

Name	Type	Status	De...	Standard	Published By
A Corporate	Project	Published	✓		RegoLink MS Ecosy.
Agile Bluep	Project	Published			Administrator, Clar.
Corporate B	Project	Published			Administrator, Clar.
Demand	Project	Published			Administrator, Clar.
Executive P	Project	Published			Administrator, Clar.
IT	Project	Published			Gille, James
IT with AIR	Project	Published			Pokorny, Mike
Marketing Group	Project	Published			Administrator, Clar.
Mergers & Acquisitions	Project	Published			Administrator, Clar.
Modern Business Management	Project	Published			Administrator, Clar.
New Product Management	Project	Published			Administrator, Clar.
Projects with Business Cas	Project	Published			Administrator, Clar.

Blueprint Configuration

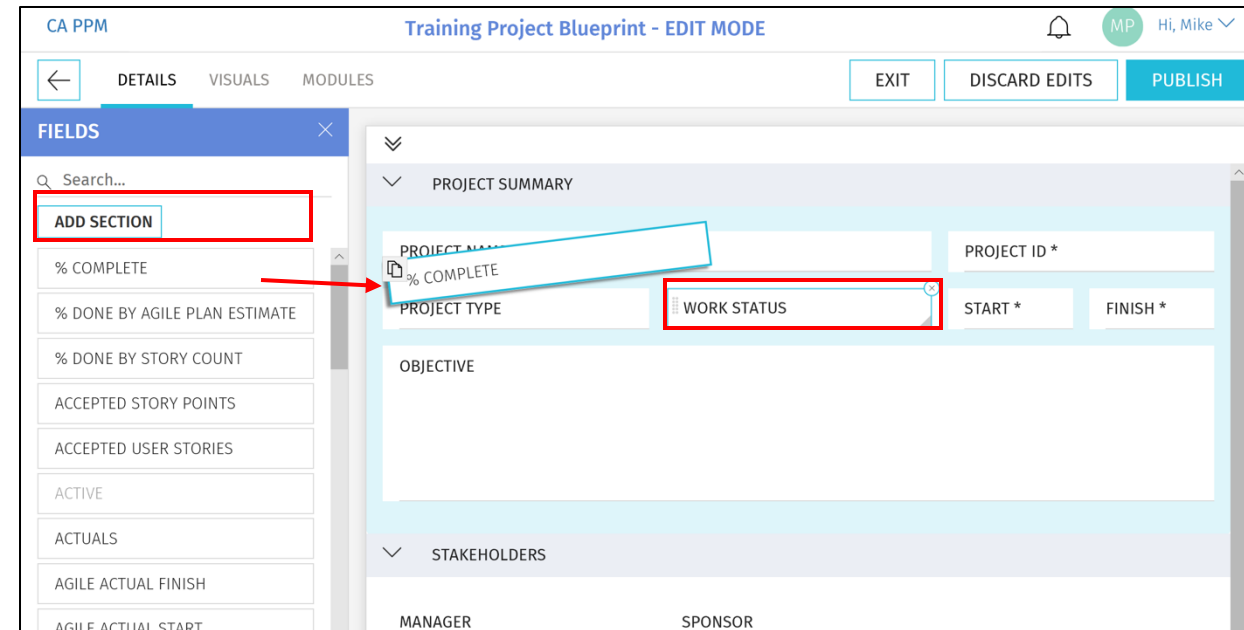
Blueprint Properties

- 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

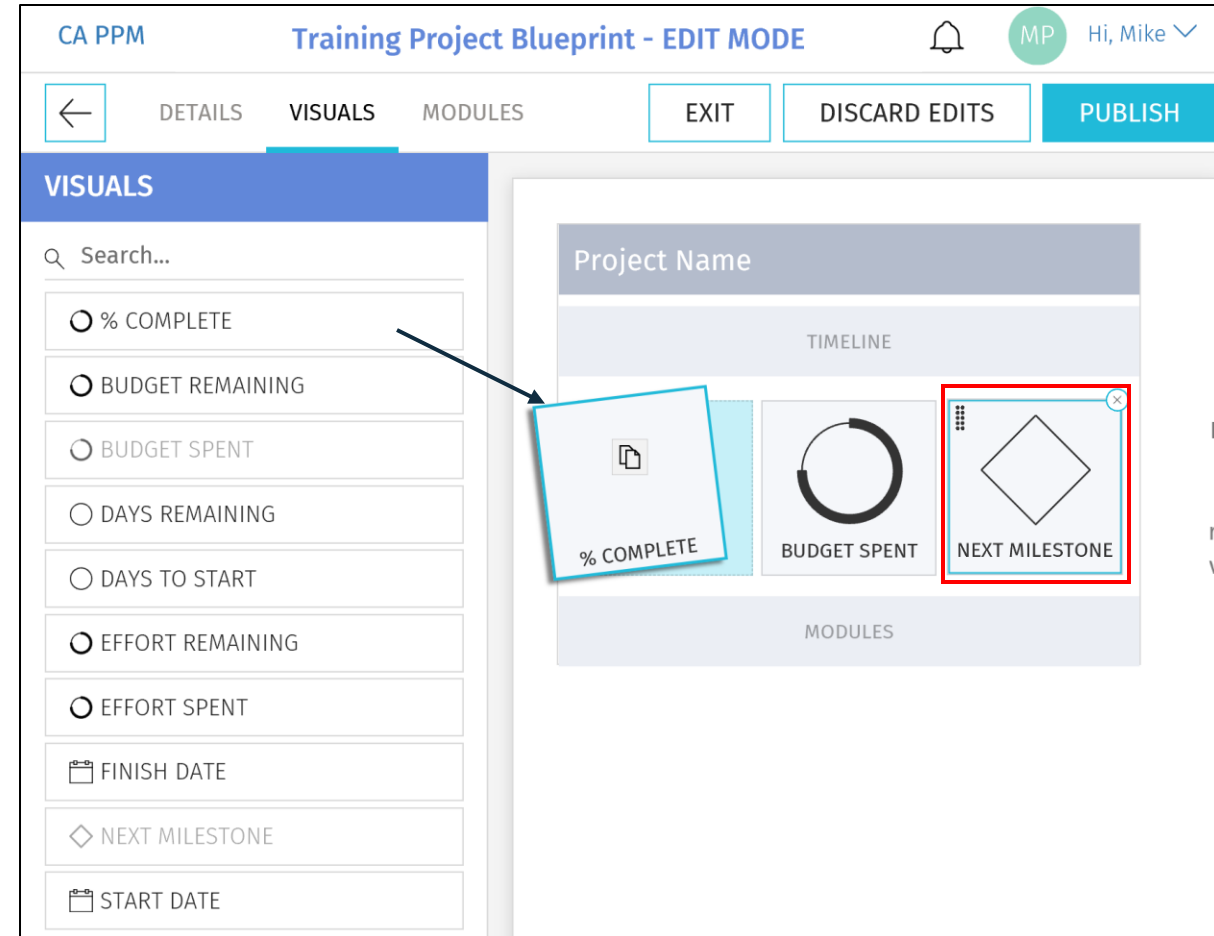
- Fields Pane
 - Provides list of fields that can be added:
 - By default, it contains a list of out-of-the-box Project and Investment fields
 - Custom fields can be added (as long as the field has an API Alias)
 - Fields that already exist on your Blueprint are greyed out
- Layout
 - Click the Add Section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

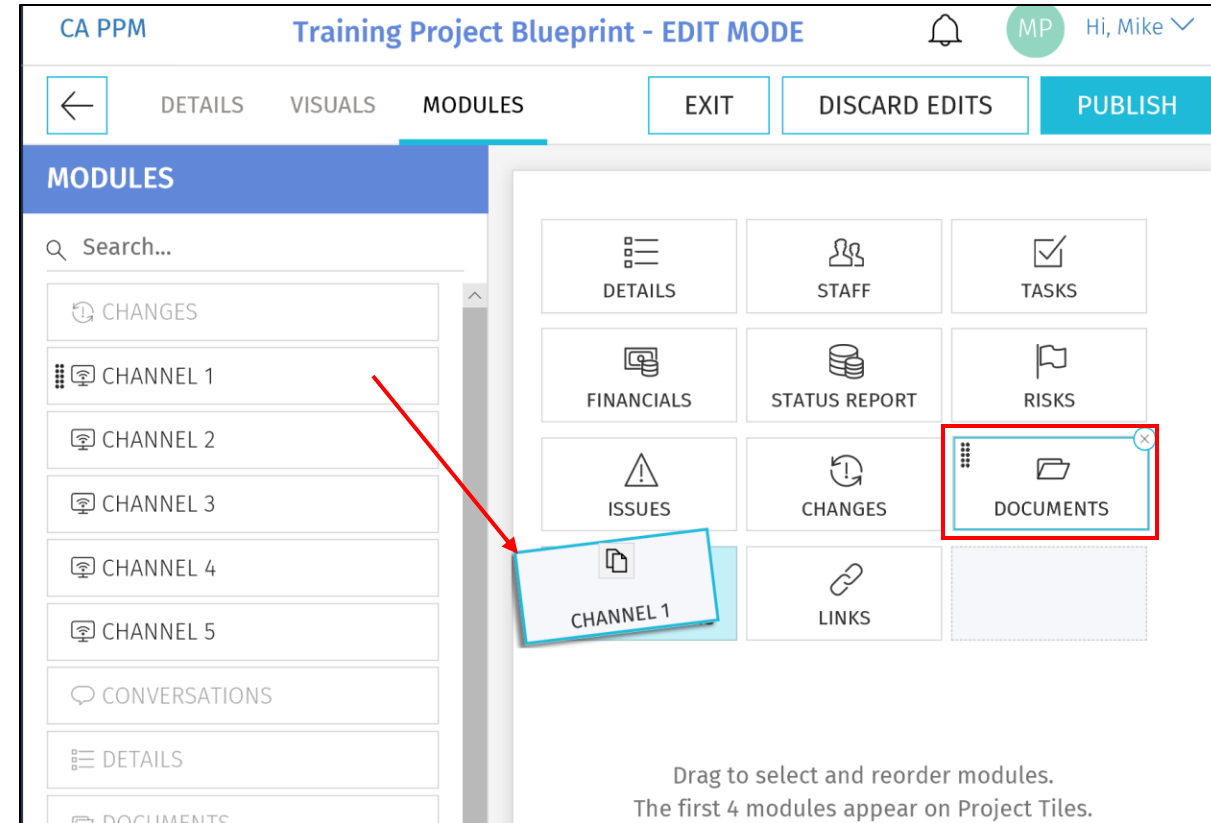
Visuals (Projects Only)

- 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 screenshot displays the CA PPM interface for the 'ACME Project'. The main view is a project plan table with columns for Task Name, Duration, Start, Finish, % Complete, Staffing Size, Status, and Assignee. The table shows tasks across various phases: Initiation, Development, Testing, and Launch. A 'smartsheet' channel is highlighted in the configuration menu.

The configuration form for the 'Smartsheet' channel is shown in a modal window. It includes the following fields:

- CHANNEL NAME ***: Smartsheet
- CHANNEL URL ***: <https://app.smartsheet.com/b/publish?EQBCT=xxxxxxxxxxxx>
- REFERRER URLS**: (Empty field)

The form also features a 'PREVIEW' button and a 'Comma Separated' note for the Referrer URLs field.

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' settings, including a 'Master Object' dropdown set to 'Project' and several checkboxes: '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 this are 'Save' and 'Save And Return' buttons.

The middle section shows the 'Properties' pane for the 'Object: Test Sub Object - Properties'. It contains fields for 'Object Name' (Test Sub Object), 'Object ID' (test_sub_prj_obj), 'API Attribute ID' (custTestSubPrjObjs), and 'Content Source'. The 'API Attribute ID' field is highlighted with a red box.

The bottom section shows a grid of modules. The 'TEST SUB OBJECT' module is highlighted with a red box, indicating it is the active module for this sub-object.

Modules – Custom Sub-Objects Blueprint

- In the module of the sub object on the blueprint, new settings are available
 - Edit Module Details: This is the blueprint for the properties of the sub object
 - Enable Properties Navigation: Allows the user to enter a blueprint of the sub object.
 - Enable Quick Create: Allow the user to create via the +
 - Enable Create Dialog: Allows the user to use comments
 - Show in Details Flyout: If the user selects the details flyout of the master, this module becomes a tab if enabled

[Edit module details](#)

Enable Properties Navigation

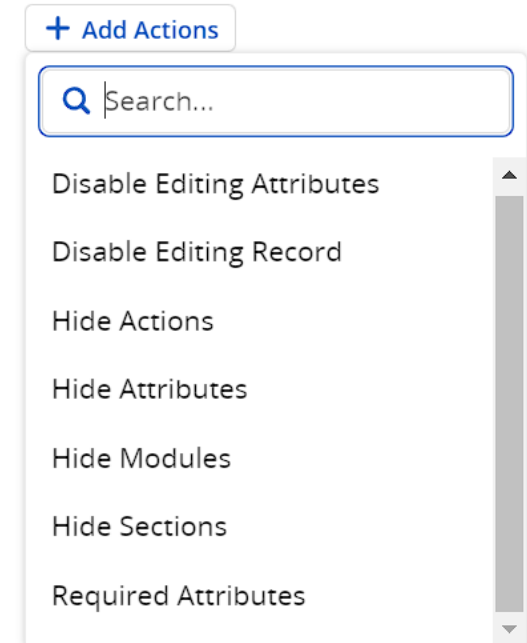
Enable Quick Create

Enable Create Dialog

Show in Details Flyout

Rules

- Rules in the Modern UX allow the administrator apply conditional logic that applies 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



Rules Cont'd

- Rules can now also implement logic according to attribute updates
 - Can produce **Data Actions** or **UI actions**
 - Can apply multiple actions per update
- Data Actions
 - Update data in one or more targeted attributes
 - Send Action Items
- UI Actions
 - Disable or hide elements
 - Make a field "required"

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)

Target Attribute
Work Status

If Is Equal To ▼ Complete × + Select . then;

Data Actions- Runs once, when condition becomes true

↳ Set Attributes Finish ▼ Current Date ▼

** Implementing data actions with **Rules** can be quicker and easier than through a process with a **System Actions***

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*

Description

Enter the rule description

Target Object

Epic
▼

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

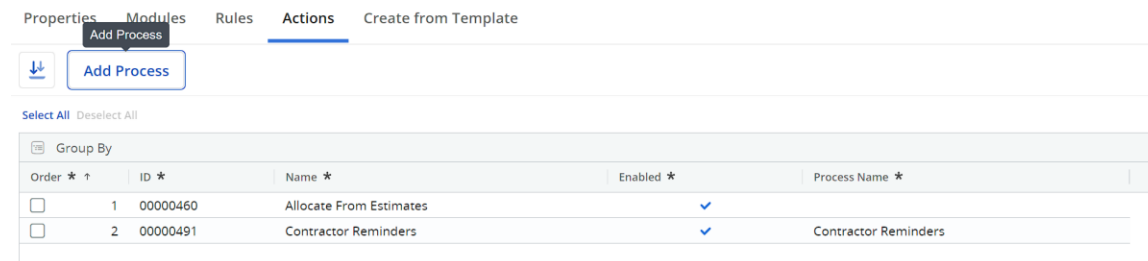
Actions

↳ Required Attributes + Select

+ Add Actions

Actions

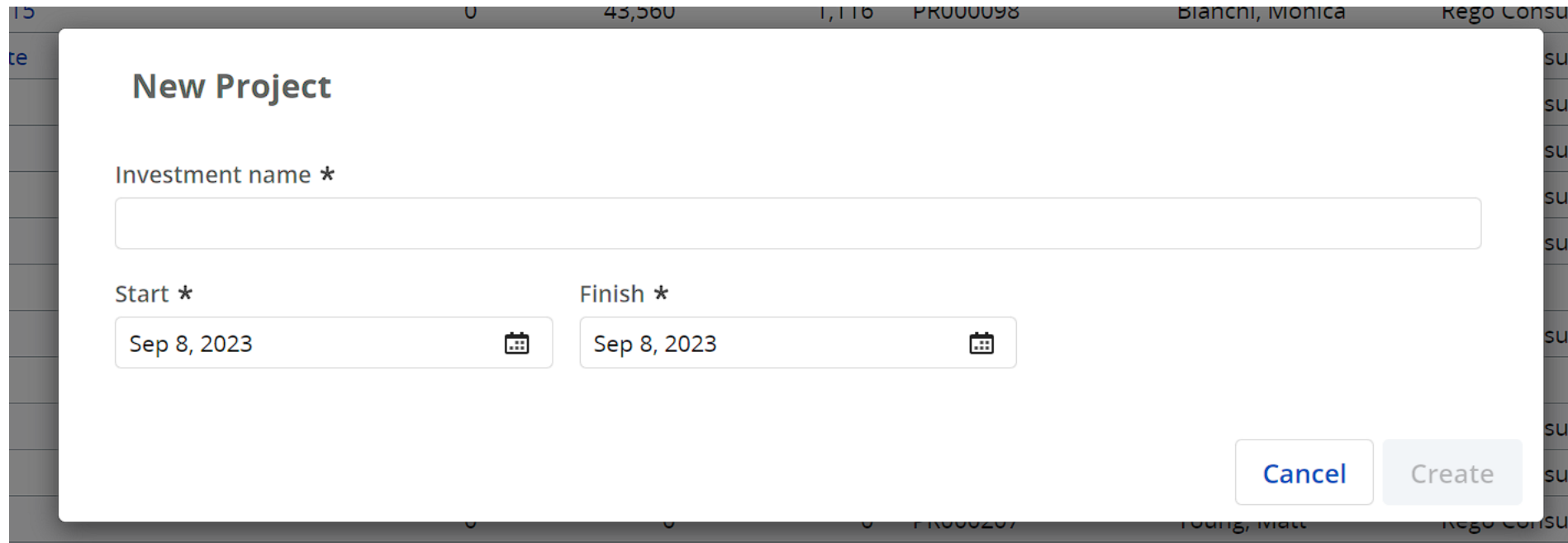
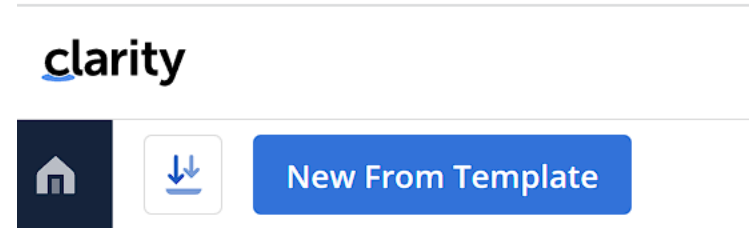
- Actions allow a user to kick off a process on demand
- Security needs to be done on the rule side of the blueprint
- Processes can be specific to the object OR non-object associated processes



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.

The image shows a 'New Project' dialog box. It has a title 'New Project' and a required field 'Investment name *' with an empty text input. Below this are two date pickers: 'Start *' and 'Finish *', both set to 'Sep 8, 2023'. At the bottom right are 'Cancel' and 'Create' buttons.

Customize Create From Template Blueprint

- The admin can customize the blueprint on the New From Template module in the blueprint associated to the Template

Administration ▶ Blueprint ▶

Project - Executive

Published: Aug 30, 2024

Edit

Properties Visuals Modules Rules Actions **Create from Template**

Users will see this dialog when creating a new Project from this blueprint.

When this dialog is displayed to users, any required fields not prepopulated will be appended to the end of this layout if they are not already included.

New Project

Project Name		
Start	Finish	Banner Color
Charge Code	Cost Type	

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 with a 3/10 step indicator. The interface is divided into three main sections:

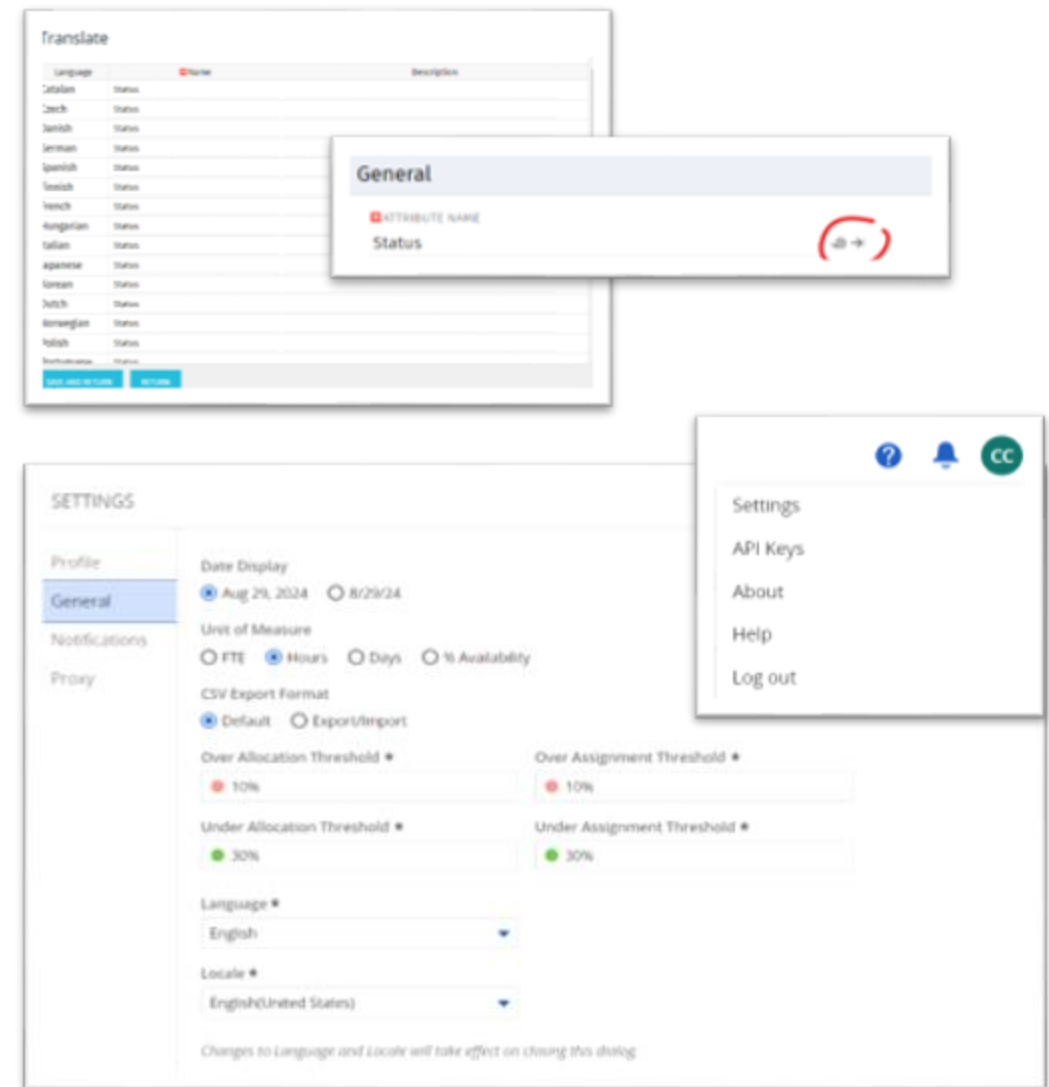
- Configure Canvas (Left Panel):** Contains a search bar and a list of widgets: Number Tile (1), Progress Ring (67%), Pie Chart, Bar Chart, and Table (2). Below the widgets is a scrollable list of fields: aatest Goal, AC Test, Active, Actuals Sum for Labor Resou..., Additional Deliverables, and Alignment.
- Count of Tasks (Top Center Widget):** Displays a large green number '2'.
- Task List (Middle Center Widget):** A table with columns: Name *, Start *, and Finish *.

Name *	Start *	Finish *
Story 1	Sep 8, 2023	Sep 8, 2023
Story 2	Sep 8, 2023	Sep 8, 2023
- Objectives Risk (Top Right Widget):** A header for a risk-related section.
- Full Description (Middle Right Widget):** A text area for detailed information.
- Budgeted Cost (Bottom Right Widgets):** Two input fields for cost tracking.
- Staff (Bottom Right Widget):** A table with columns: Resource *, Role, and Booking Status *. It currently shows 'No Rows To Show'.

A 'Done' button is located in the top right corner of the canvas area.

Multilingual Translations

- Attribute translations can be configured in Studio (Classic UI)
 - All languages configurable in one place
 - Applies to attributes in both Classic and MUX
- All MUX translatable elements must be configured by switching languages for the logged-in user. This applies to:
 - Field Labels (Attribute Administration - MUX)
 - Blueprint Sections, Tabs, Action Buttons
 - Help Text



Conditional Formatting

- Conditional Formatting is now available on the list areas in the modern experience as of 16.2
- Rules: Apply a positive test scenario
- Format: Applies the below to the To
 - Bold
 - Italics
 - Underline
 - Strikethrough
 - Background Color
 - Font Color
- To: What column should be affected by the formatting



Conditional Formatting



New Rule

▼ Collapse All

Rules

Format

To

Actions

Set Conditions **All** Any

▼ Active = Yes
 + Add condition Remove all

AaBbCcYyZz ▼ Active ▼

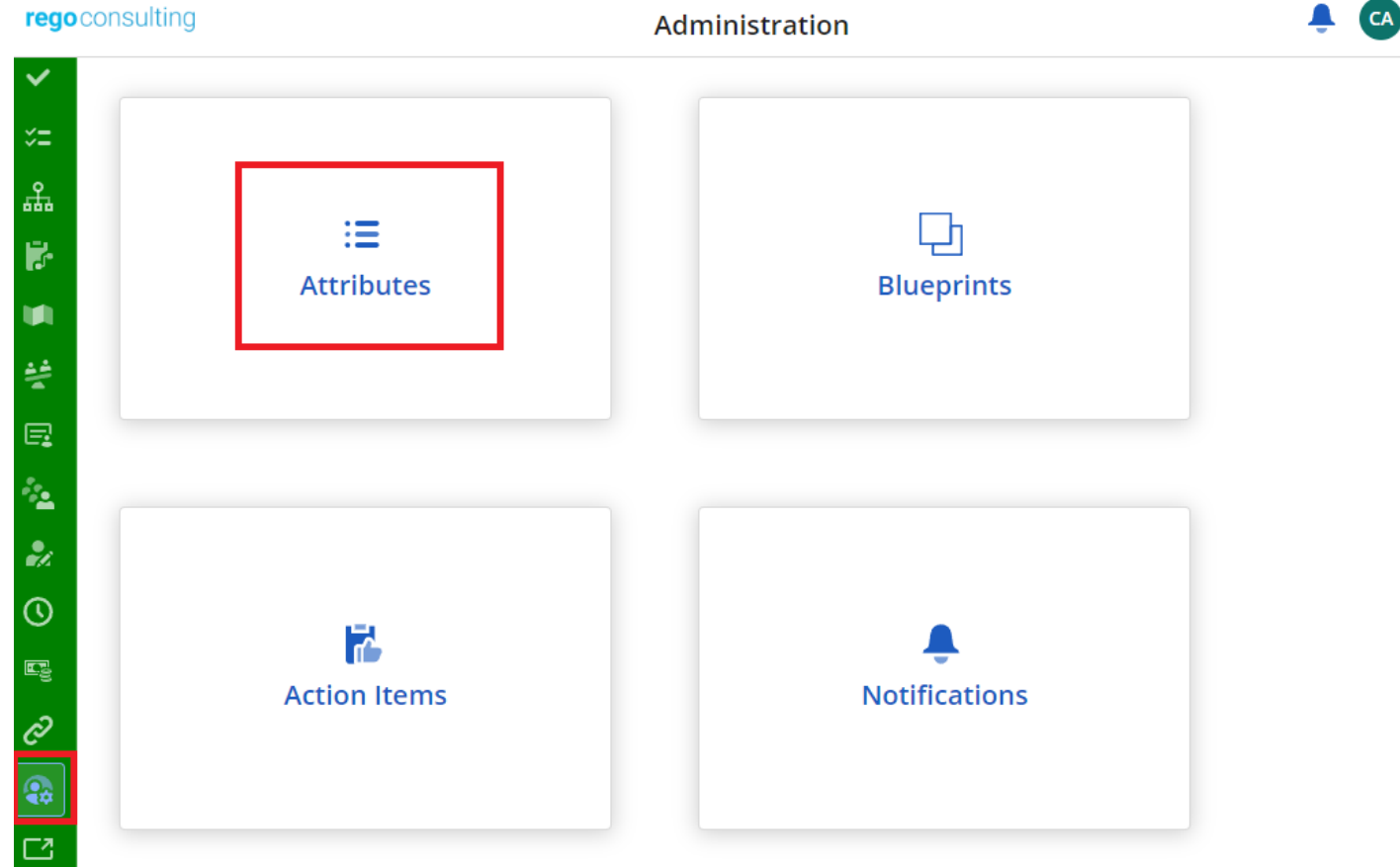
B *I* U ~~S~~

Clear Format Done

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/into 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	
% Complete Calculatio...	percent_calc_mode	Project				inv_projects	percent_calc_mode	✓		Percent Complete ...	
% Done By Agile Plan E...	agl_pctdon_plest	Project				odf_ca_project	agl_pctdon_plest	✓		% Done By Agile Pl...	
% Done by Story Count	agl_pctdon_stc	Project				odf_ca_project	agl_pctdon_stc	✓		% Done By Story C...	
AC Initiative ID	r_initiative_id	Project				odf_ca_project	r_initiative_id	✓		Rally Initiative ID	
AC Initiative Link	r_initiative_link	Project				odf_ca_project	r_initiative_link	✓		Rally Initiative Link	
AC Initiative Name	r_initiative_name	Project				odf_ca_project	r_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	
AC Project	r_ac_project	Project				odf_ca_project	r_ac_project	✓		Rally Project	
AC Risk Score	r_risk_score	Project				odf_ca_project	r_risk_score	✓		Rally Risk Score	
AC Sync Features	r_import_epic_featur	Project				odf_ca_project	r_import_epic_featur	✓		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 User...	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.

Force Attribute Update

- Introduced in 16.2, admins can navigate to the Classic administration area of an attribute and force the attribute name change into the Modern UX name.
- This is also helpful to add the changes to alternative languages as doing so for Labels in the Modern UX is not administrative friendly

▣ ATTRIBUTE NAME

Adoption - Data Quality Metric



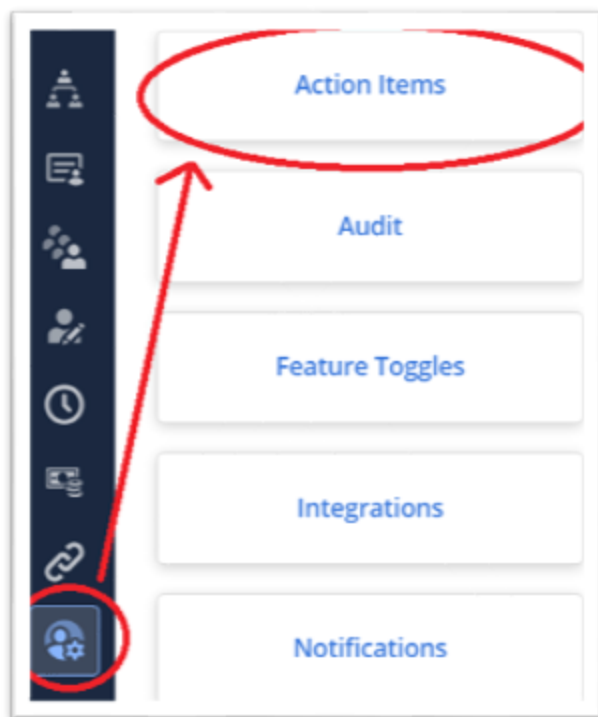
Other Administrative Functions

Auditing, Timesheet Rules, Action Items & Notifications

Action Items & Notifications (1)

Step 1: Define an Action Item

(Requires **Administration - Action Items – Navigate** access right)



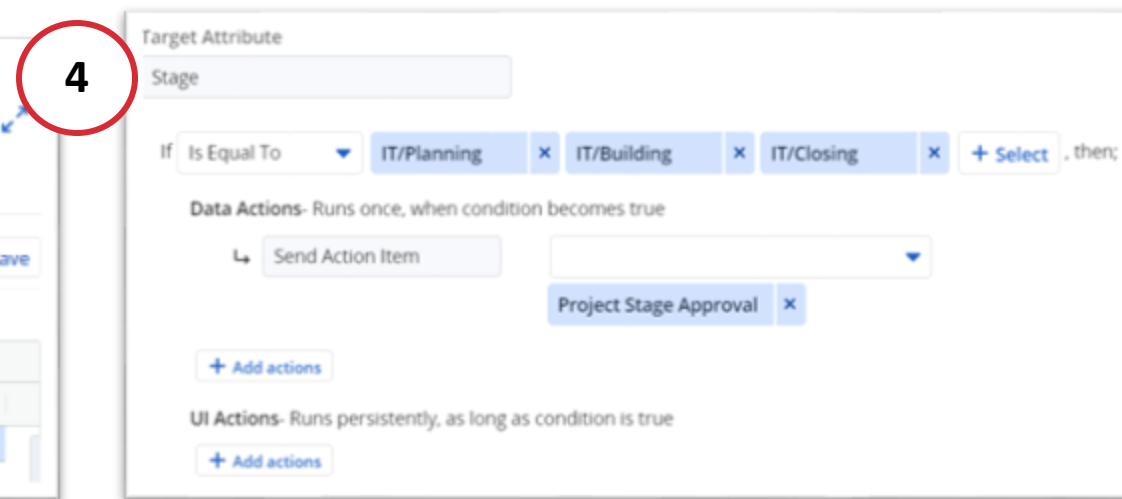
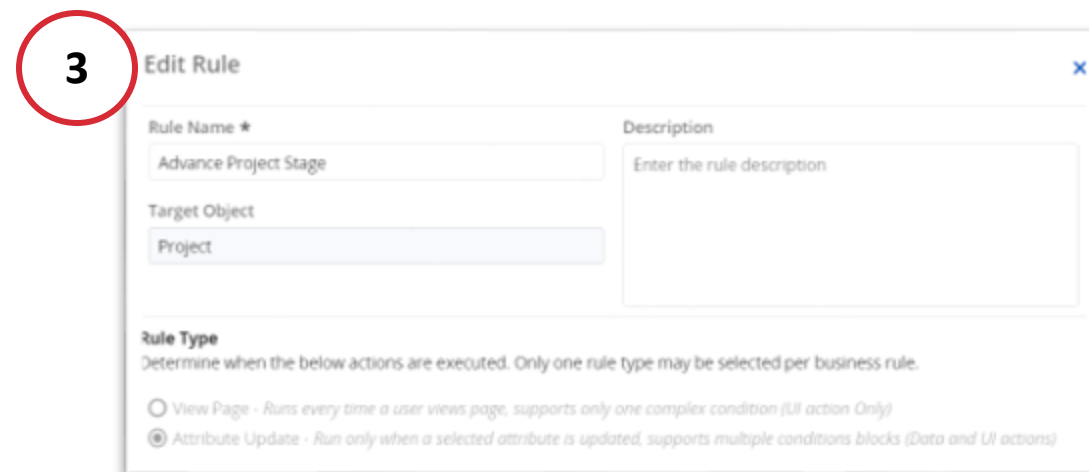
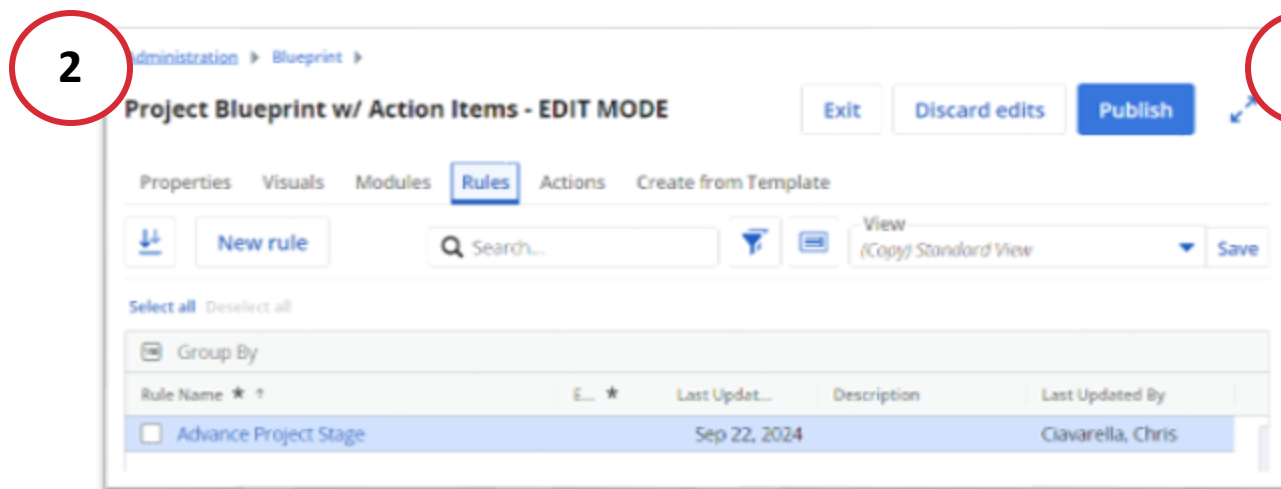
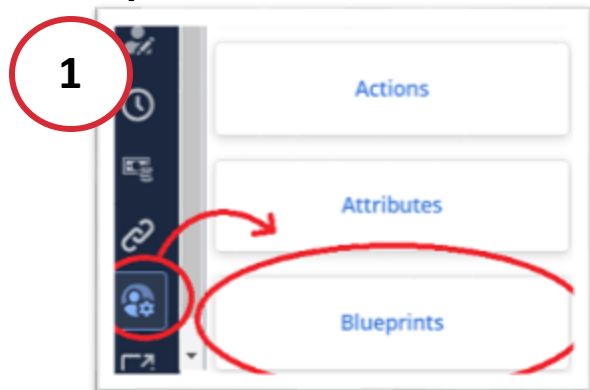
A screenshot of the 'Create New Action Item - Step 1 of 3' form. The form is titled 'Create New Action Item - Step 1 of 3' and has a close button (X) in the top right corner. It is divided into three sections: 'Description', 'Content', and 'Message'.
- **Description:** 'Identify and map the action item.' Fields include 'Name *' (Project Stage Approval), 'Target Object *' (Project), and 'Description'.
- **Content:** 'Configure the message to recipients.' Fields include 'Subject *' (Project Stage is changing to \${Project.stage_code}), 'Priority' (Medium), and '+ Add attribute'.
- **Message:** A text area containing 'Project Stage is changing to \${Project.stage_code} on Project \${Project.name}'.
Buttons at the bottom include 'Cancel' and 'Next'.

A screenshot of the 'Create New Action Item - Step 2 of 3' form. The form is titled 'Create New Action Item - Step 2 of 3' and has a close button (X) in the top right corner. It is divided into two sections: 'Recipients' and 'Actions'.
- **Recipients:** 'Assign the action item.' Fields include 'Resource Attribute', 'Access Group' (PMO Project Manager), and 'Resource'.
- **Actions:** 'Add Actions *' (Approved, Rejected).
Buttons at the bottom include 'Back' and 'Next'.

A screenshot of the 'Create New Action Item - Step 3 of 3' form. The form is titled 'Create New Action Item - Step 3 of 3' and has a close button (X) in the top right corner. It is divided into two sections: 'Decisions & Actions' and 'Add condition'.
- **Decisions & Actions:** 'All recipients can choose from decisions selected here.' It shows two decision rules:
 - **If Approved:** decision is submitted by Any Recipients then:
 - Close Action item for all recipients
 - Set Attribute: Work Status (Complete)
 - **If Rejected:** decision is submitted by Any Recipients then:
 - Close Action item for all recipients
 - Set Attribute: Work Status (On Hold)
Buttons at the bottom include 'Add condition', 'Cancel', 'Back', and 'Save'.

Action Items & Notifications (2)

Step 2: Define an Action Item Trigger



Action Items & Notifications (3)

Step 3: Trigger an Action Item

The screenshot illustrates the process of triggering an action item in a project management system. The interface shows a table of projects with columns for Project ID, Active status, Project Name, Stage, Manager, Work Status, and Blueprint. A dropdown menu is open over the 'IT/Initiation' stage of the 'Demo Action Item Project' row. A notification card is displayed on the right, indicating that the project stage is changing to Planning.

Key elements and annotations:

- 1**: A red circle highlights the 'IT/Planning' option in the dropdown menu.
- 2**: A red circle highlights the 'IT/Initiation' stage in the table row.
- 3**: A blue circle highlights the notification card on the right, which contains the message: "Project Stage is changing to Planning. Project Stage is changing to Planning on Project Dem...".

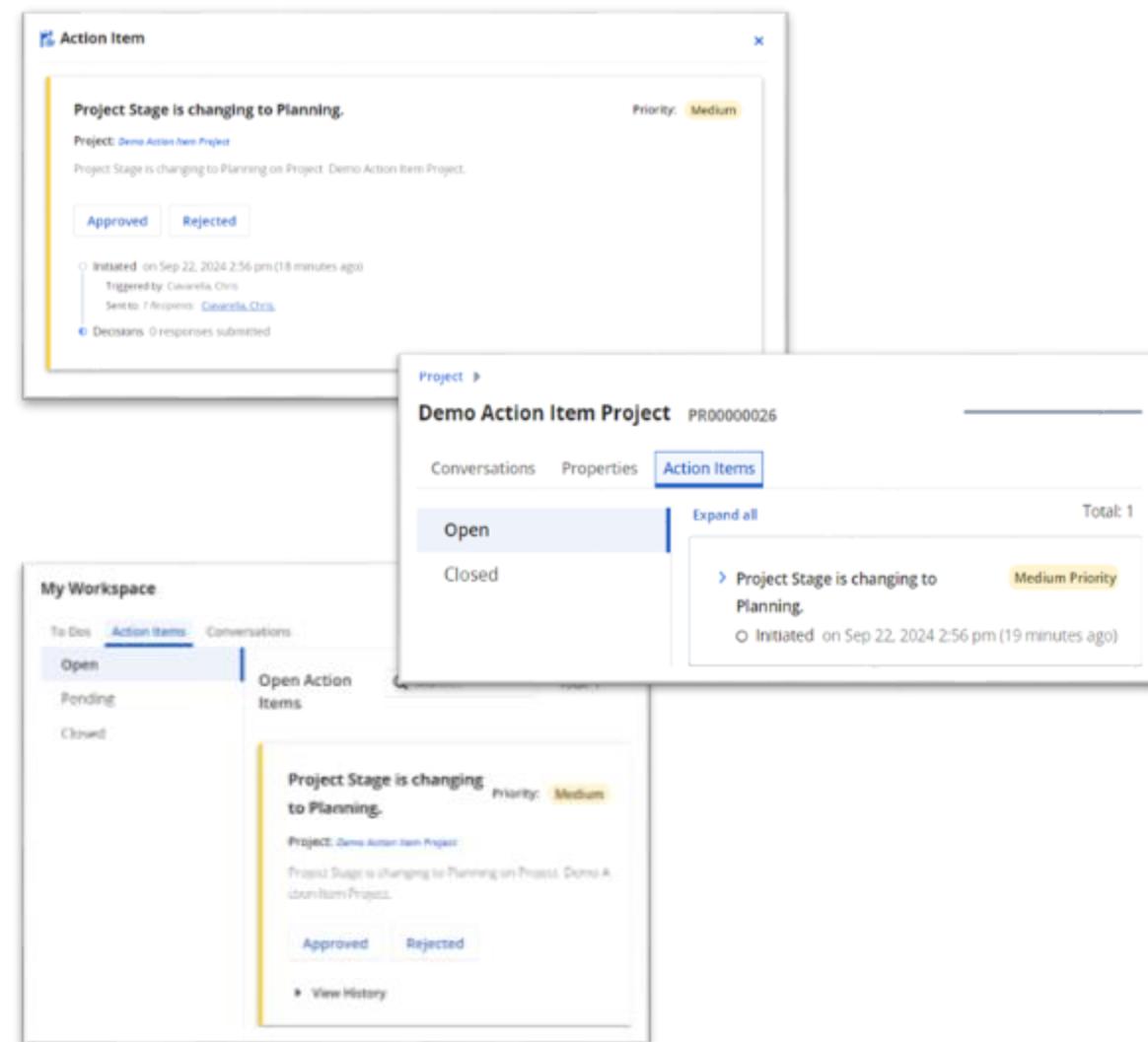
Project ID	Active	Project Name	Stage	Manager	Work Status	Blueprint
Total	1					
<input type="checkbox"/> PR0000026	<input checked="" type="checkbox"/>	Demo Action Item Project	IT/Planning	Clavarella, Chris	Requested	Project Blueprint w/

Action Items & Notifications (4)

Step 4: Respond to an Action Item

- Action Item assignees can respond to their Action Items in the following ways:

- Through the Notifications area in the page header.
- Through the Action Items module on a Blueprint
- Through an Action Items table widget on a Page Canvas
- Through the My Workspace area of the MUX
- On the mobile app
- Through E-mail (OOTB or Rego AIR)



Audit

- Global view of audited objects (configurable in the Classic UI)
- Ability to view audit information for:
 - Attributes (Non-TSV)
 - Per-period metrics (TSV)
 - Allocations, Assignments, ETCs, Actual Costs
 - Resource Task Assignments
 - Resource Group Membership
 - Changes during Impersonation

The screenshot displays the 'Classic UI - Object Administration' interface. At the top, there are navigation tabs: PROPERTIES, ATTRIBUTES, LINKING, ACTIONS, VIEWS, **AUDIT TRAIL**, and ACCESS TO THIS OBJECT. Below the tabs, the object is identified as 'Object: Project - Audit Trail Attributes'. The main section is titled 'Attribute Audit' and contains the instruction 'Select the attributes that you wish to audit when changes occur.' There are two columns: 'Attributes Available for Auditing' and 'Audited Attributes'. The 'Attributes Available for Auditing' column lists: Objectives Risk, Objectives Risk - Deprecated, Open for Time Entry, Organizational Culture Risk, and Organizational Culture Risk - Deprecated. The 'Audited Attributes' column lists: Stage, Status, Project Type, and Project Category. Below this, there is a section for 'Administration' with an 'Audit' sub-section. It has tabs for 'Attributes' (selected) and 'Per-Period Metrics'. Under 'Attributes', there are 'Match Filters' (All, Any) and 'Add filter groups'. A filter is applied: 'AND Changed Date = 10 Days Before -...'. There is also a 'Group By' section with a dropdown menu. At the bottom, there are columns for 'Object', 'Record', 'Parent', 'Attribute', and 'Operation', each with a small upward arrow icon.

MUX - Global Audit View

Timesheets Rules

- Found in the Administration area
- Allow validation checks against a predefined set of criteria
- Prevents non-compliant timesheets from being submitted and necessitating a return
- Customizable messages and calls to action which are displayed prior to a submission being accepted (when violated)

The image shows the 'Edit Rule' configuration window and two error messages. The 'Edit Rule' window has the following fields:

- Rule Name ***: > 24hrs check
- Description**: Don't allow > 24hrs in a day
- Error Message***: You cannot enter more than 24hrs in a day.
- Timesheet Error Conditions**:
 - Resource: + Add condition
 - Time Period: + Add condition
 - Timesheet Total: Timesheet Daily Total > 24 X + Add condition

At the bottom of the 'Edit Rule' window are 'Cancel' and 'Save' buttons.

The first error message (top) is a red box with a warning icon and the text: "This timesheet cannot be submitted due to errors. Please correct the items and resubmit. You cannot enter more than 24hrs in a day."

The second error message (bottom) is a red box with a warning icon and the text: "This timesheet cannot be submitted due to errors. Please correct the following items and resubmit." followed by a bulleted list: "• You cannot enter more than 24hrs in a day."

The background shows a timesheet submission interface with a progress bar at 100%, buttons for 'Select Resource', 'Errors' (with a notification badge), 'Submit', and 'Notes'.

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 O1 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

Sample Table

Post Time Sheets	6:00 PM	6:00 PM
Post Transactions	6:30 PM	6:30 PM
Post to WIP	6:45 PM	6:45 PM
Import Financial Actuals	7:00 PM	7:00 PM