regoUniversity

KANSAS CITY • 2024

Modern UX Administration

Your Guides:

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Introductions

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

Agenda

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

Introduction

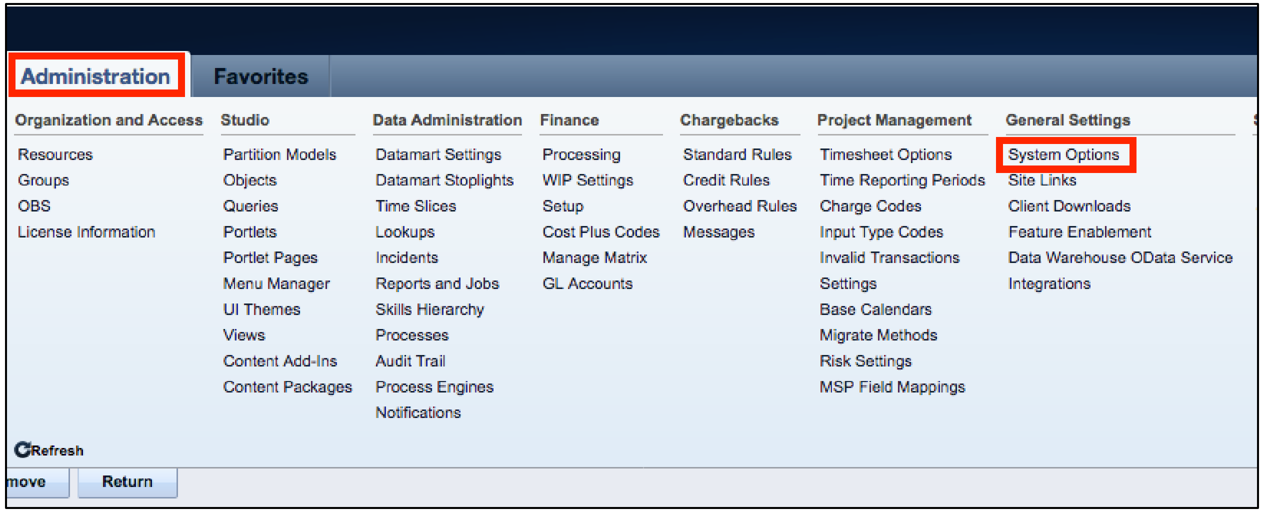
Administration in the Modern UX

- 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

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

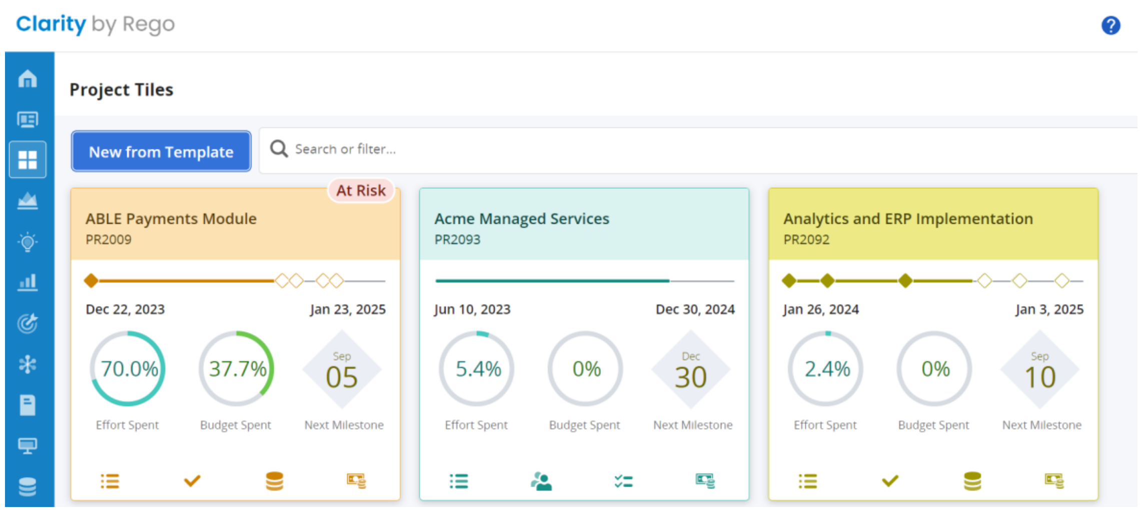


Basic Navigation

- 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

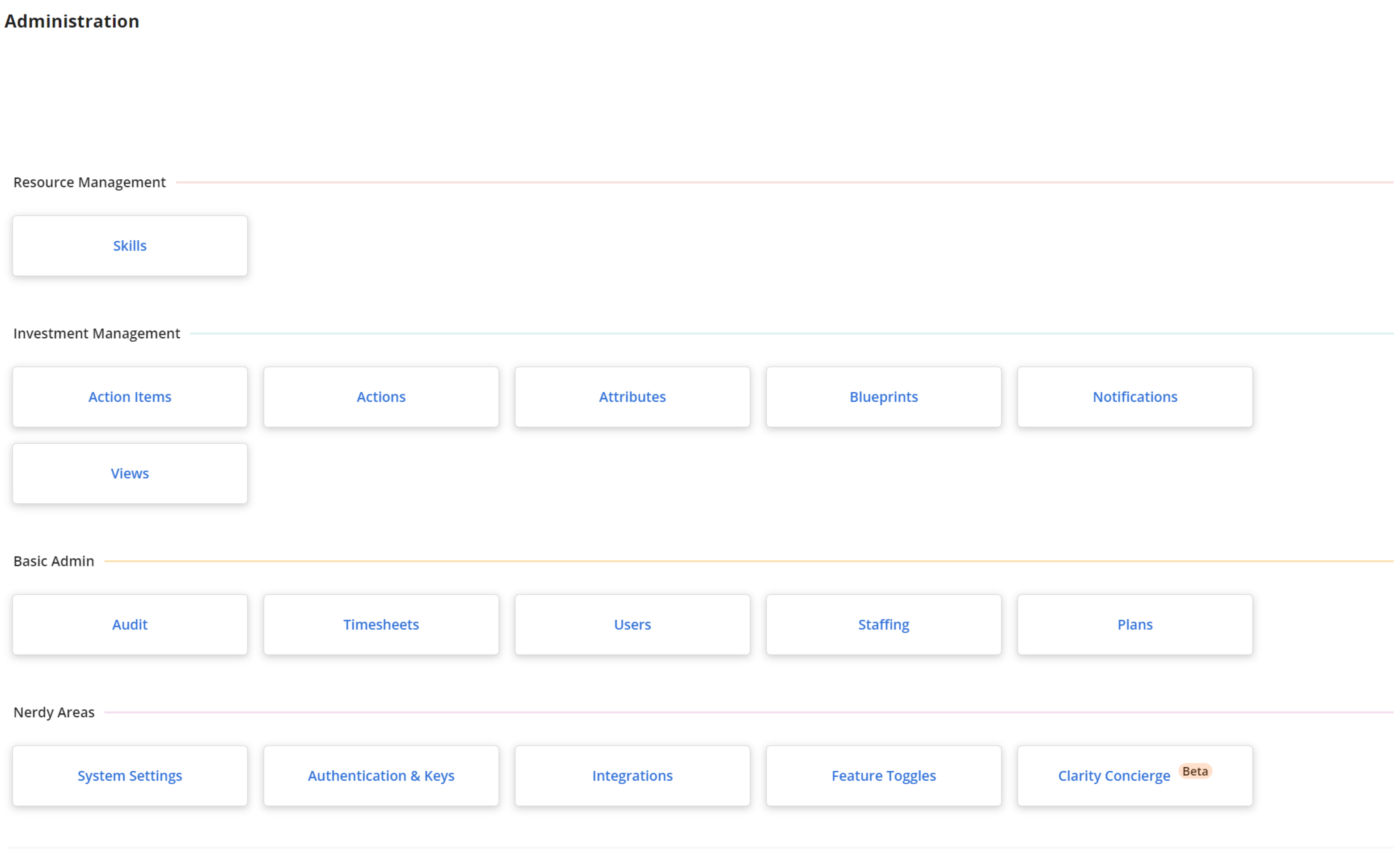
https://knowledge.broadcom.com/external/article/253271/how-to-create-a-link-to-the-modern-ux-fr.html

- 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)



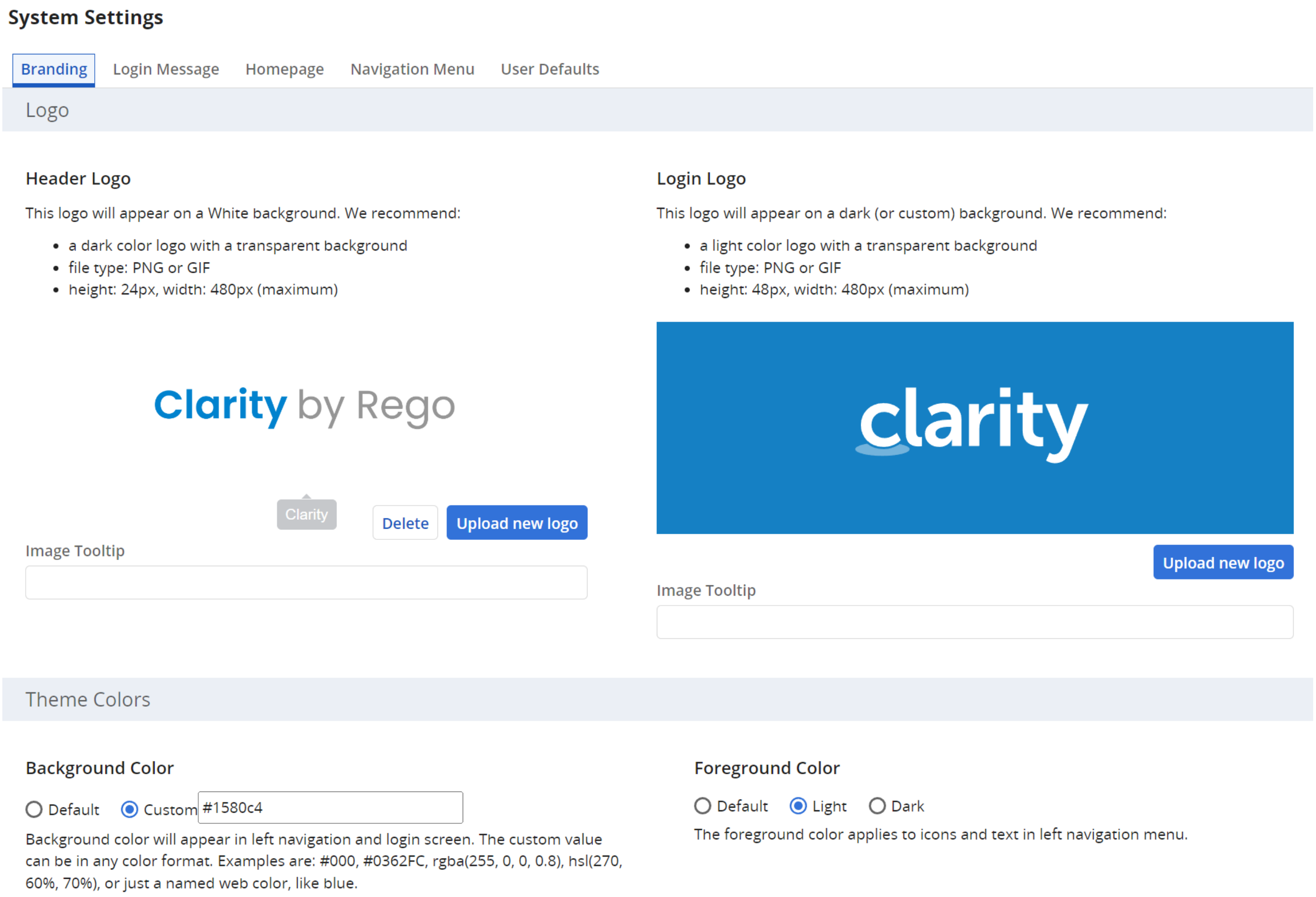
Basic Configuration – Administration Module

- 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



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



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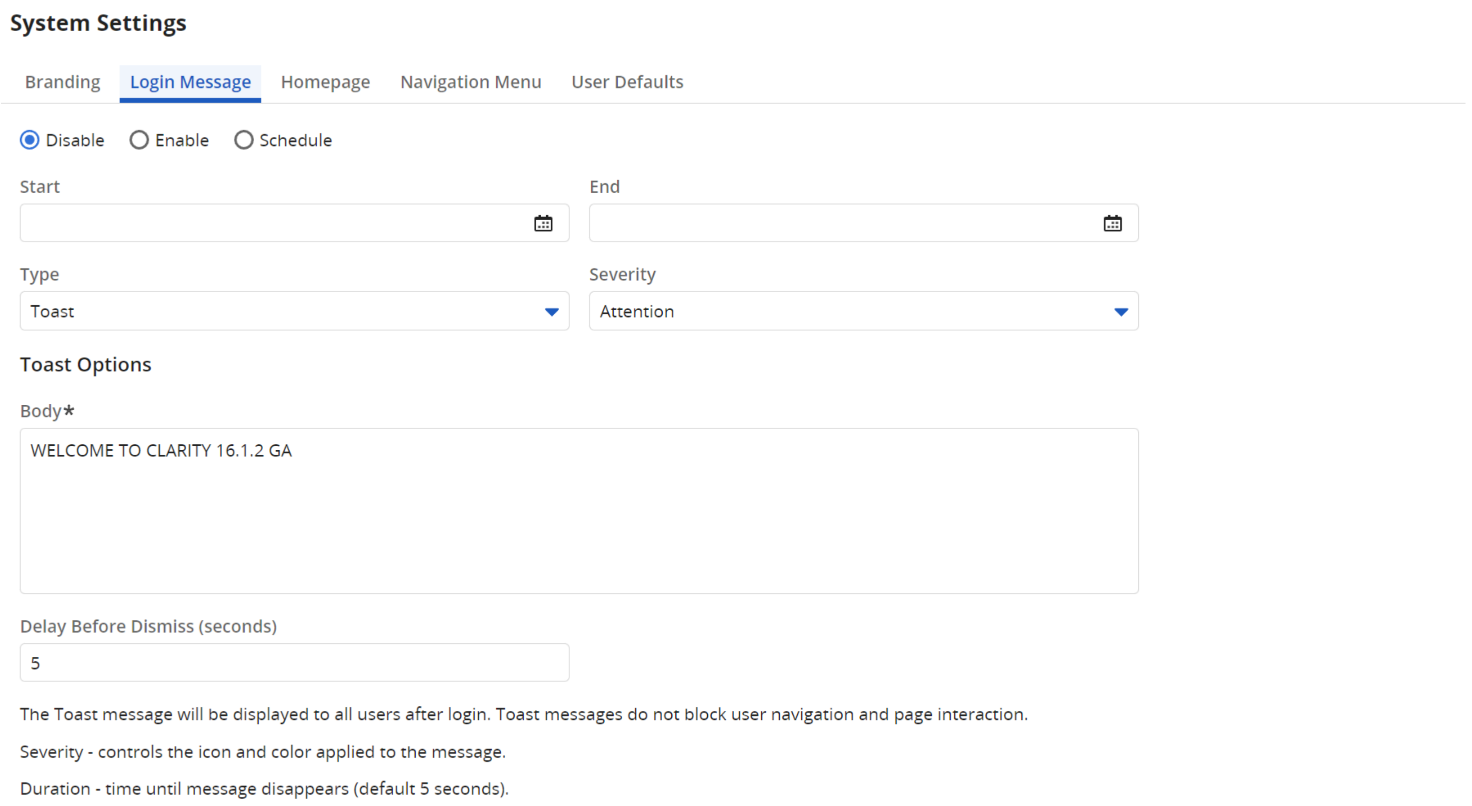

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System Settings

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.

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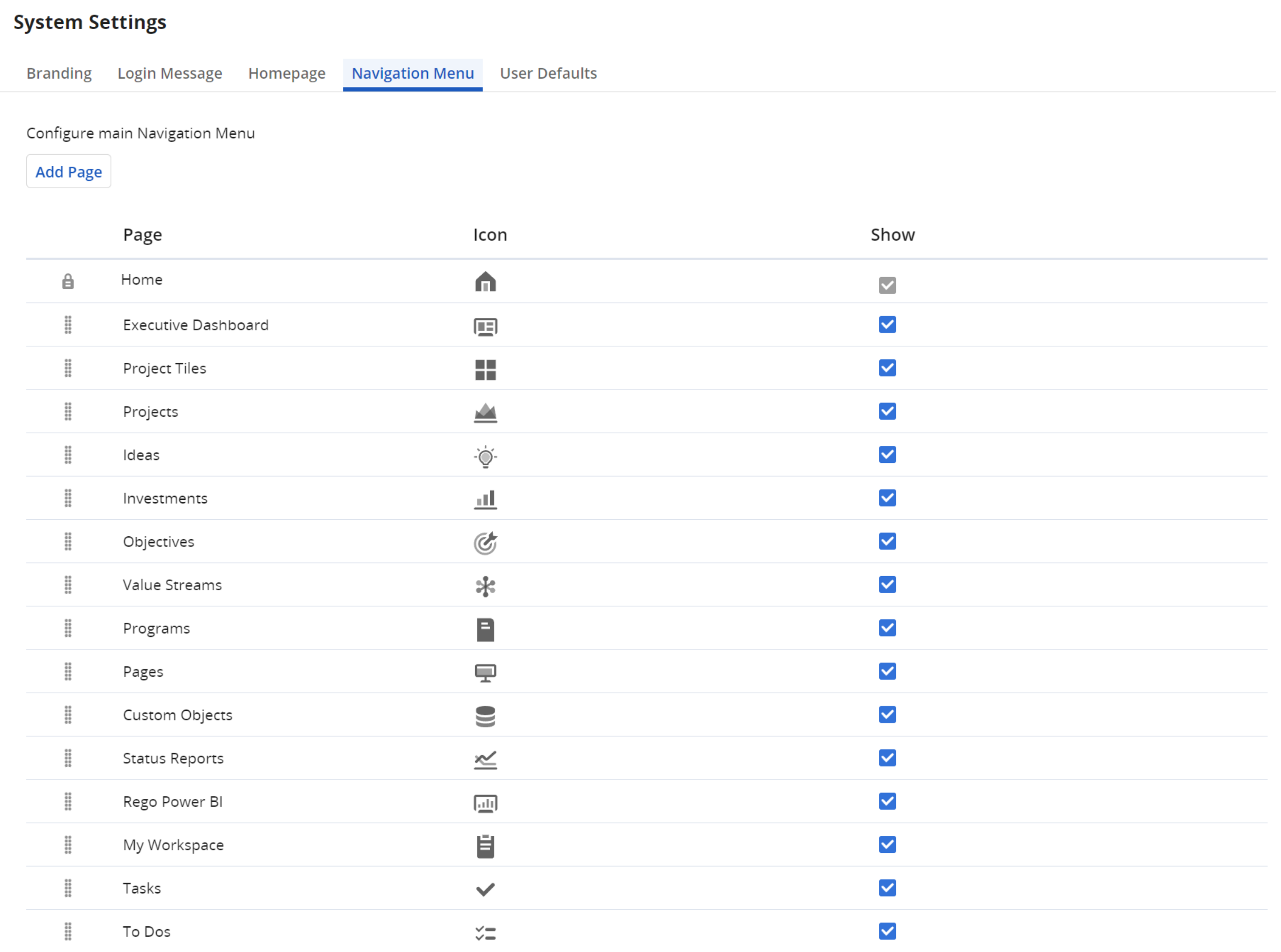

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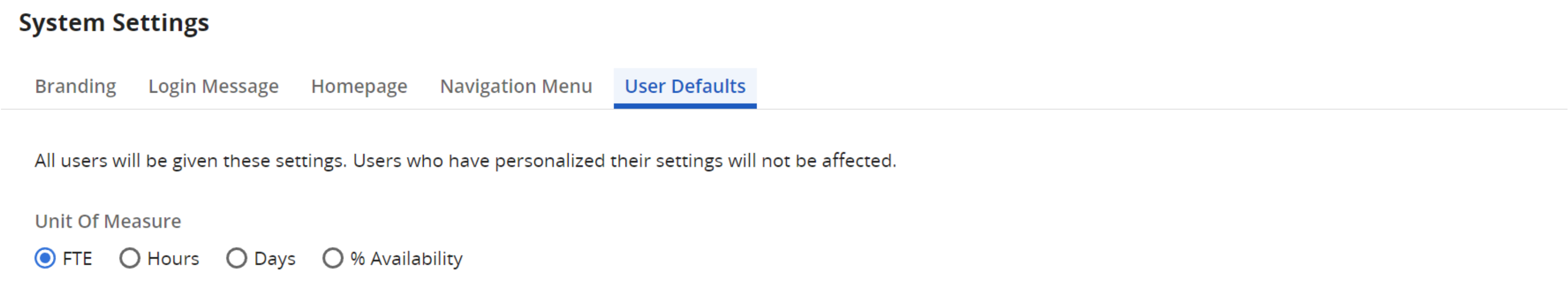
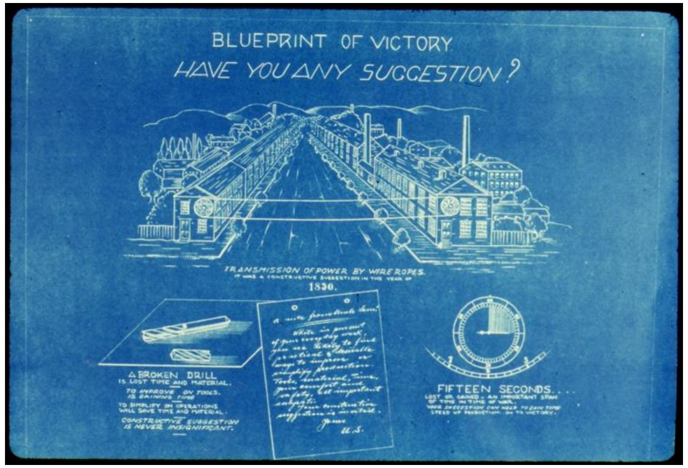


Blueprints and Attribute Administration

Overview

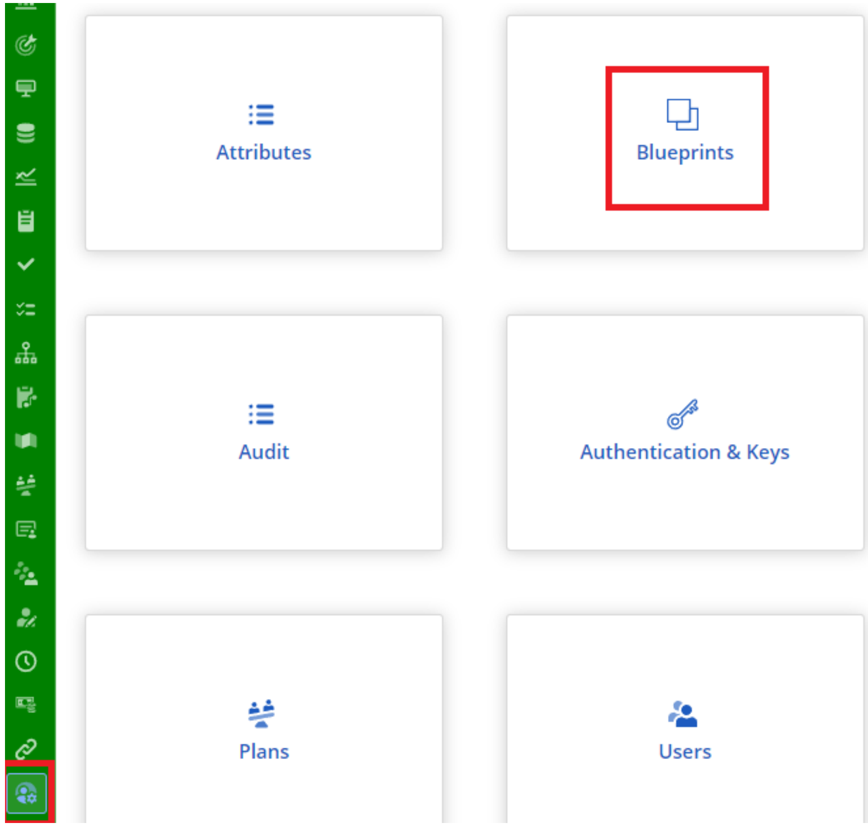
- Blueprints are configurable layouts in the New User Experience for Ideas, Projects, Custom Investments, Custom Objects and some MUX modules
- Allow Users to see the right data at the right time, for the right work
- They can be assigned to specific instances by: using templates, manually or using processes
- 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

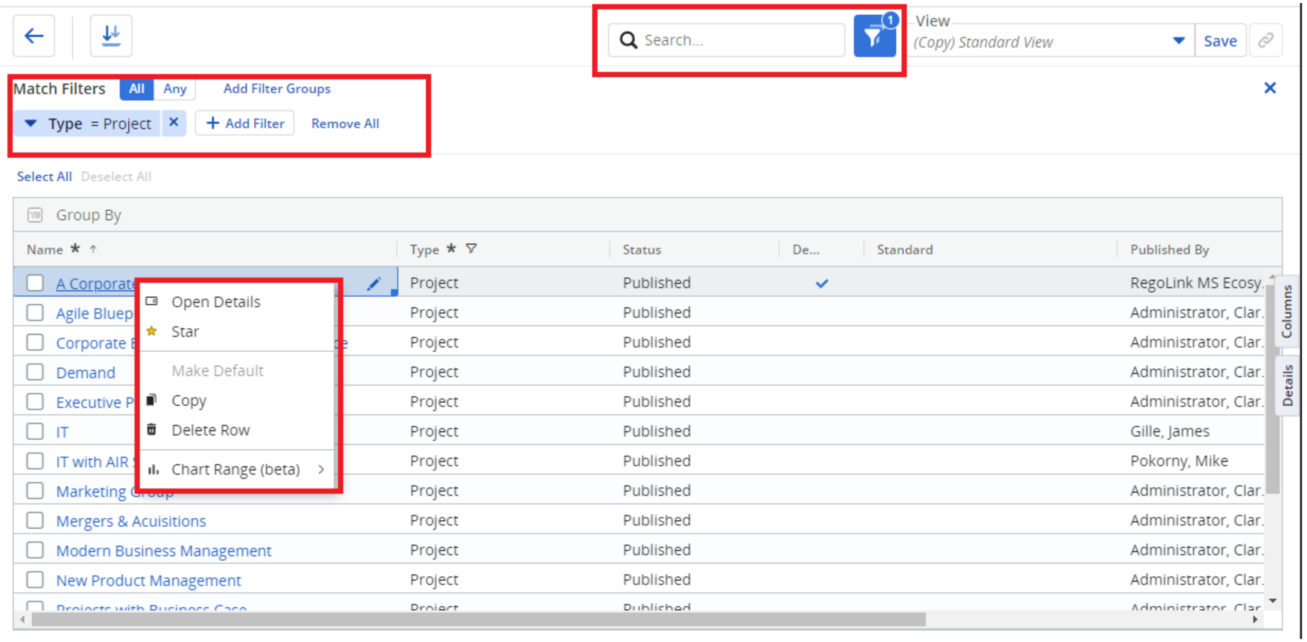
- To have the ability to view and update Blueprints, a user requires the following security rights (assigned through Classic UI)
  - Blueprint – Create Copy, Blueprint - Delete – All, Blueprint – Edit – All, and/or Blueprint – View – All

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

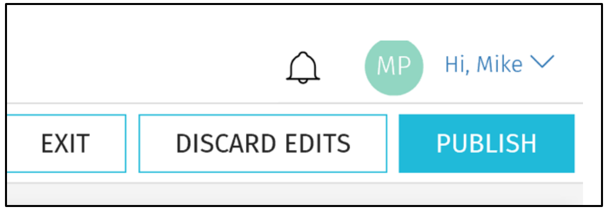
- See a list of all the Blueprints that have been created in the system.
- Filter and navigate to a specific Blueprint, or perform an action:
  - Copy – Create a new Blueprint which is a one for one copy
  - Rename – Rename the Blueprint
  - Delete – Delete the Blueprint
  - Make Default
    - Any newly 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.)

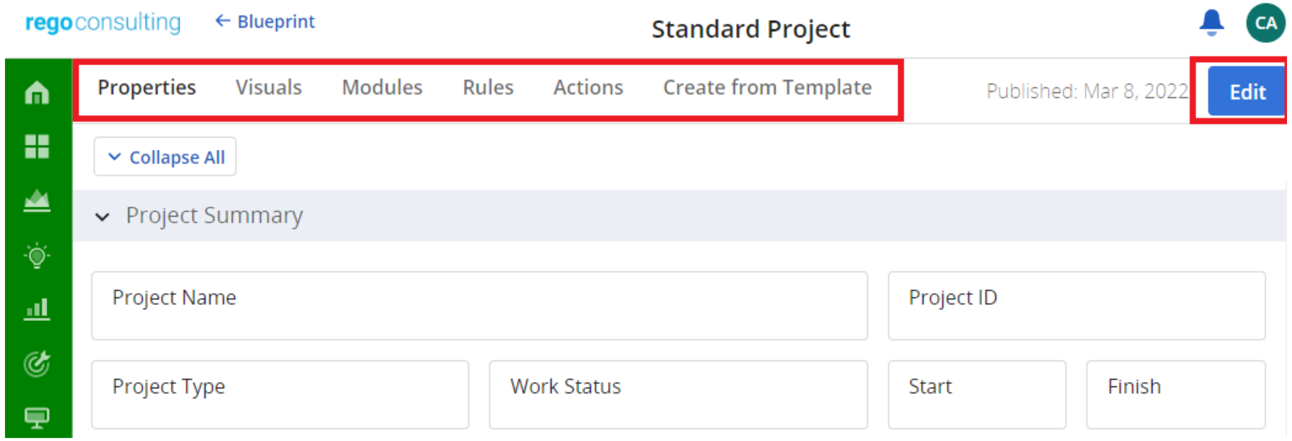


Blueprint Configuration

Blueprint Properties

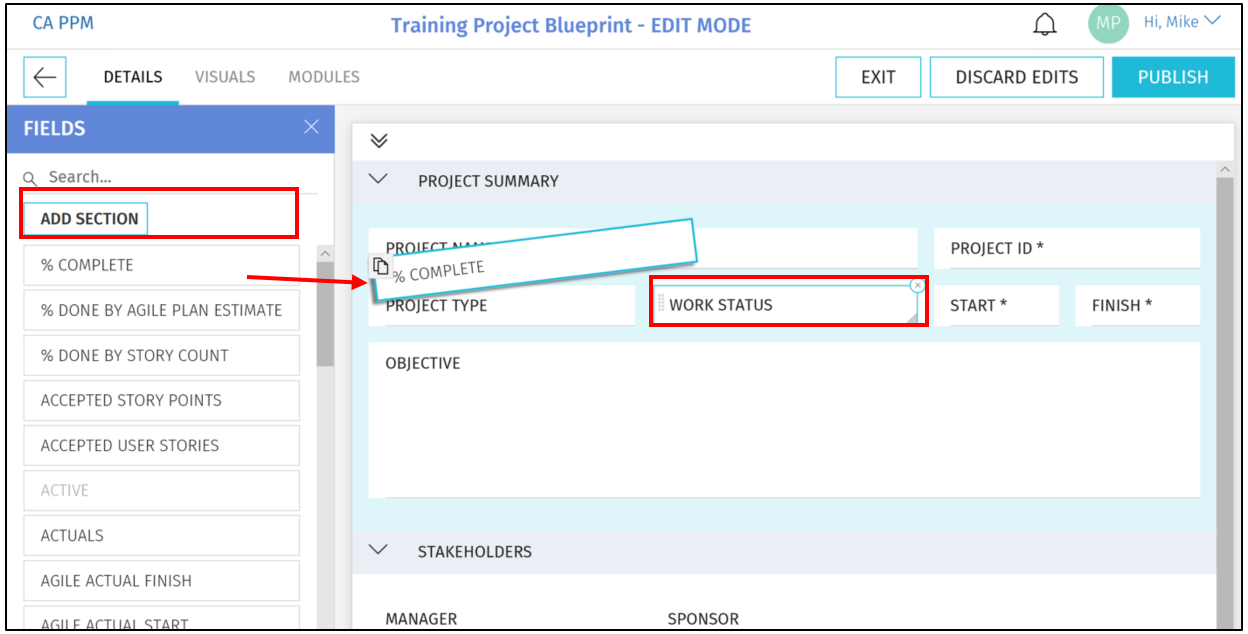
- Using a Project Blueprint as an example, the properties view will allow you to configure the following: (We will go more in-depth later on these topics.)
  - Properties – Defines the properties pane of the object. Admins can configure “Sections” and “Attributes” by dragging, dropping and resizing accordingly.
  - 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

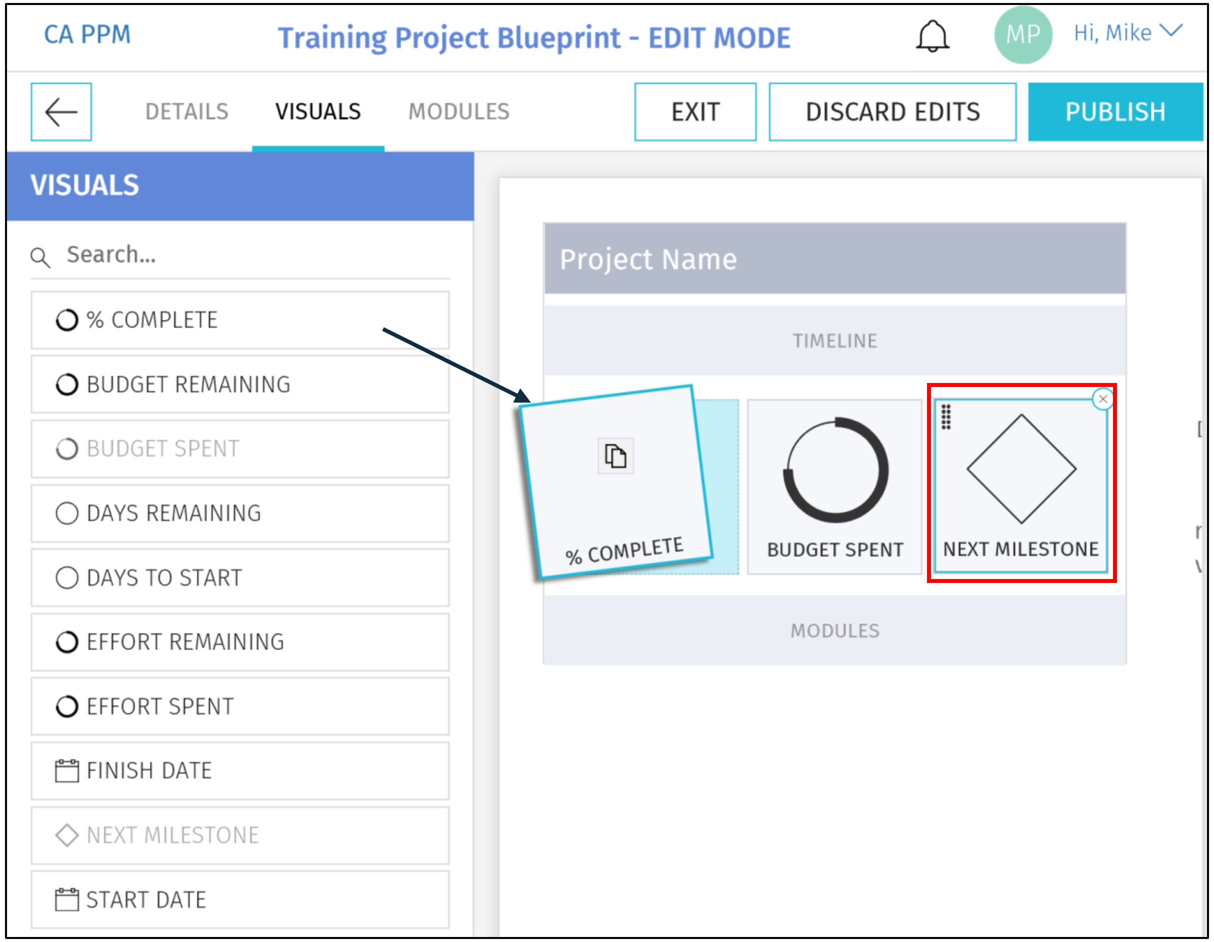
- Fields Pane
  - Provides list of fields that can be added:
    - By default, it contains a list of out-of-the-box Project and Investment fields
    - Custom fields can be added (as long as the field has an API Alias)
  - Fields that already exist on your Blueprint are greyed out
- Layout
  - Click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

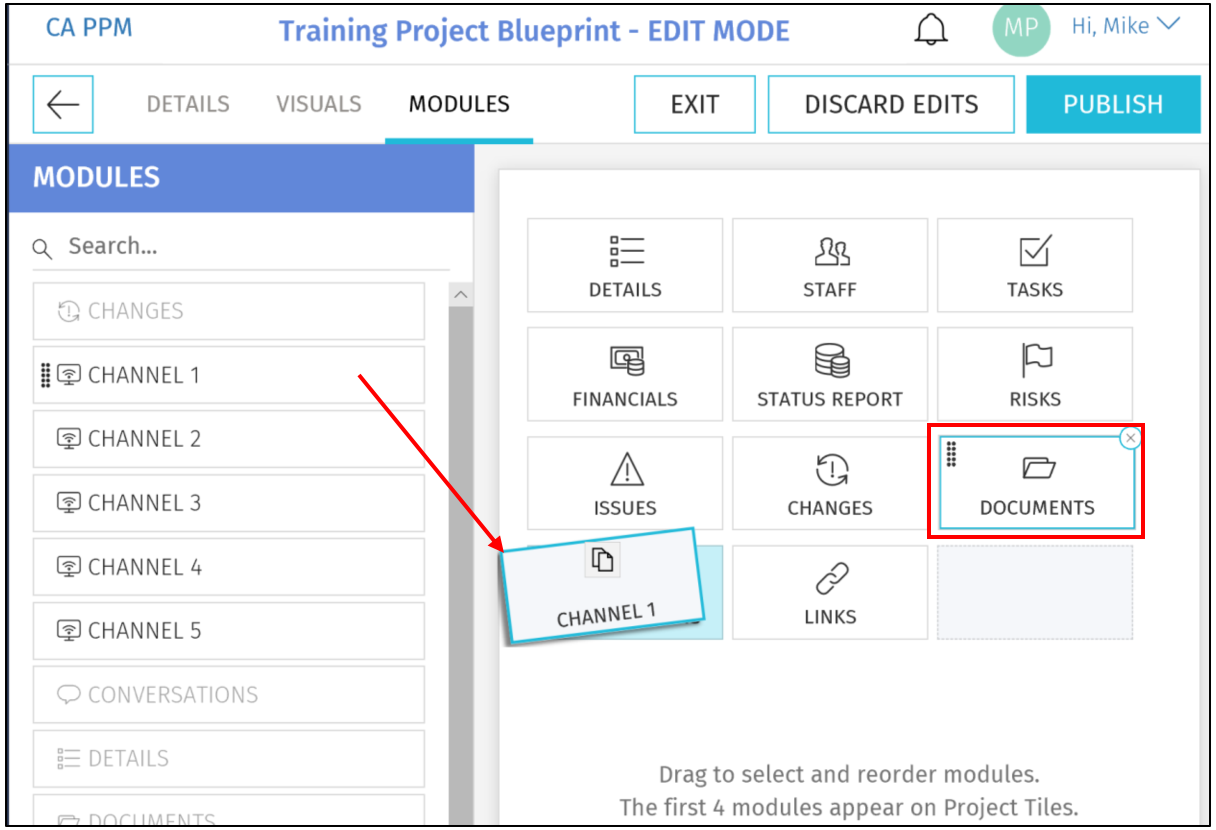
Visuals (Projects Only)

- 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



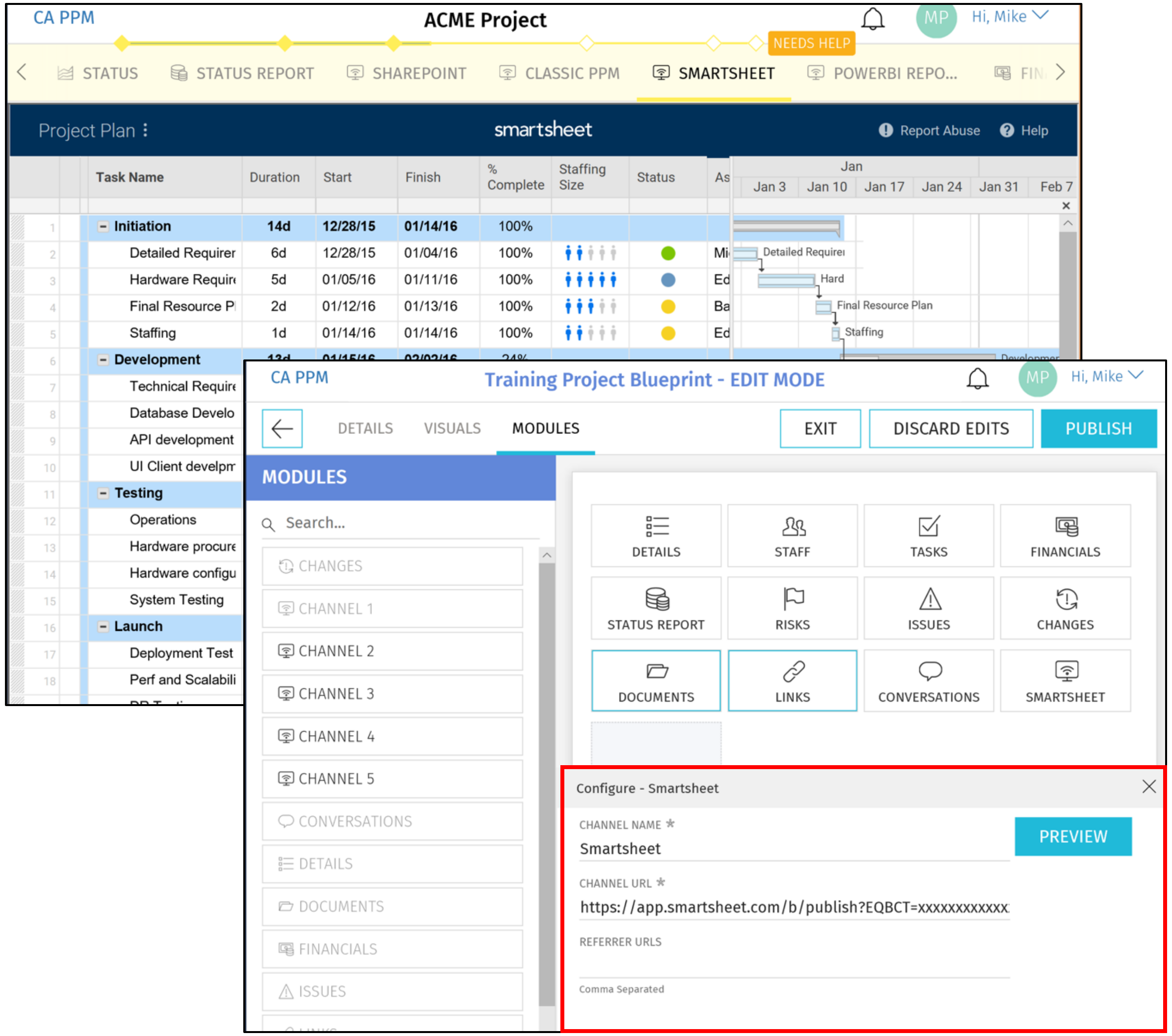
Modules

- 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)



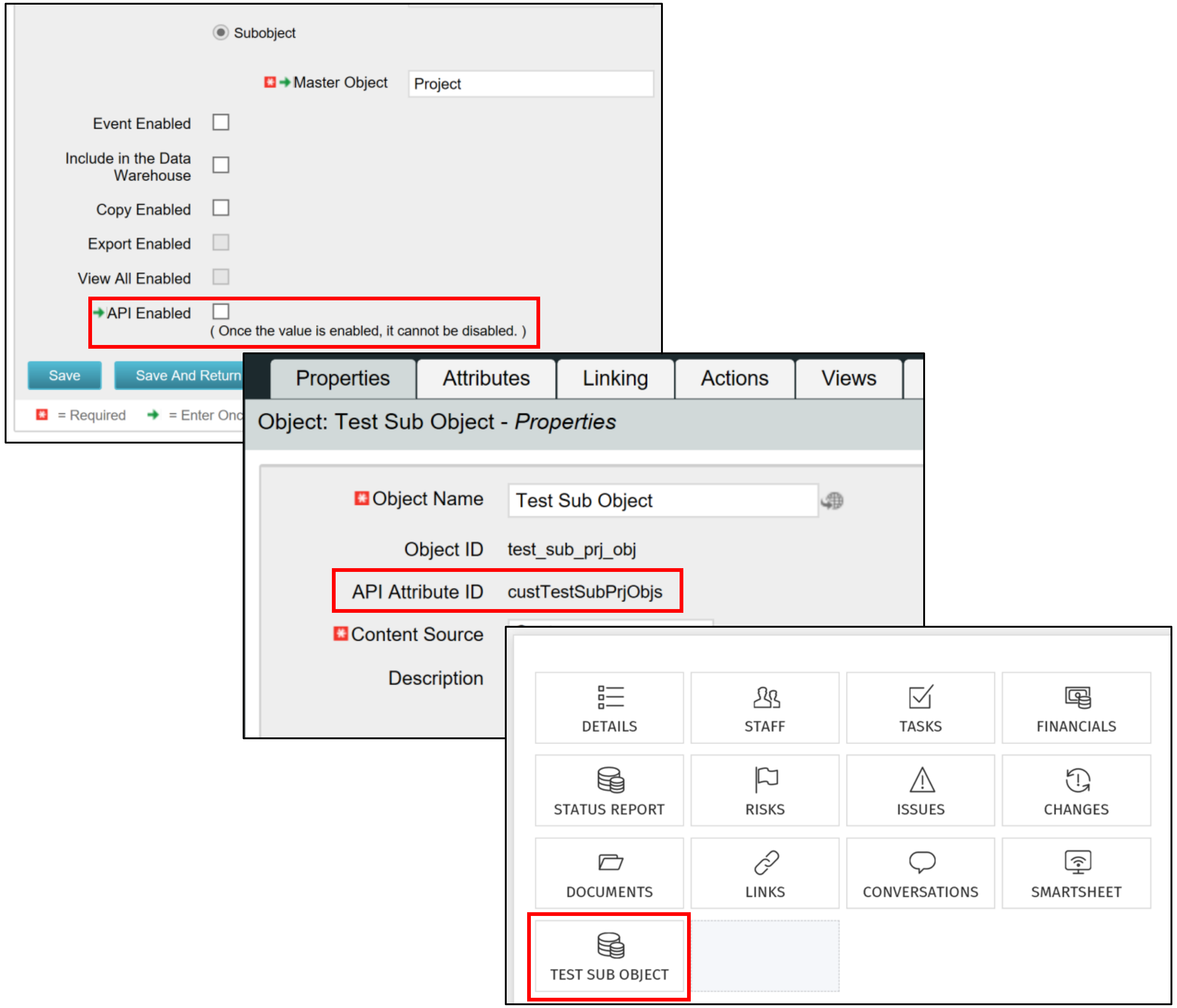
Modules – Channels

- 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



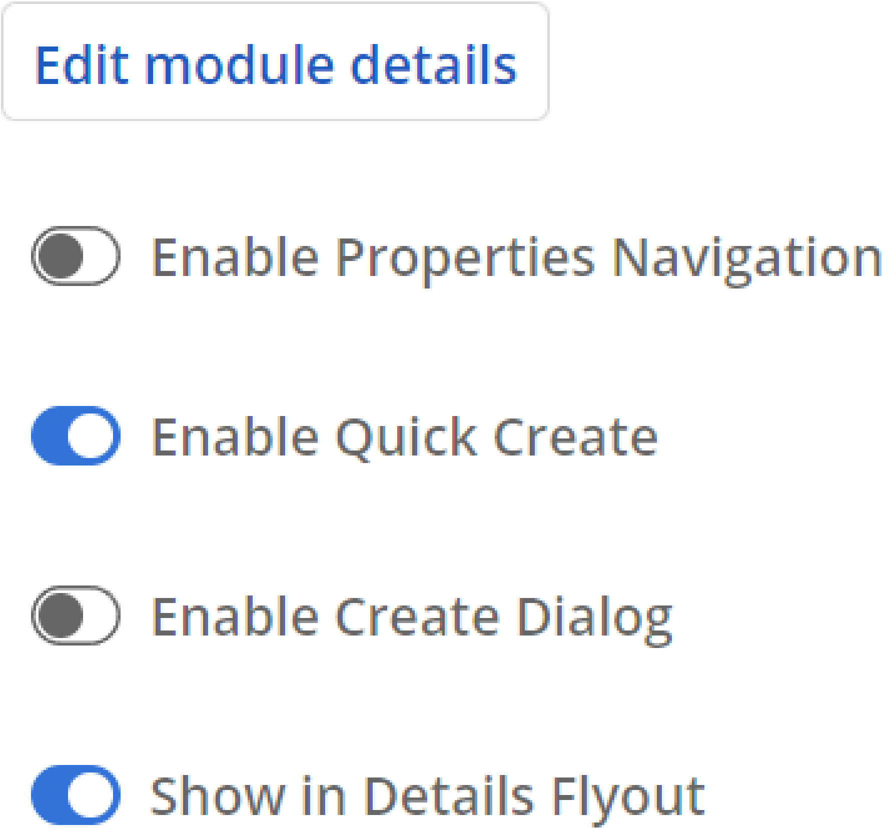
Modules – Custom Sub-Objects

- 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 2^{nd} and 3^{rd} level sub-objects
  - Configuring “Properties pane” for the sub-objects



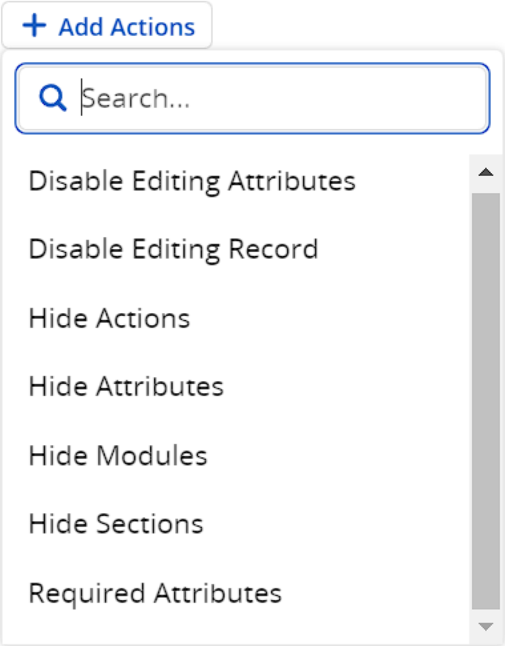
Modules – Custom Sub-Objects Blueprint

- 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



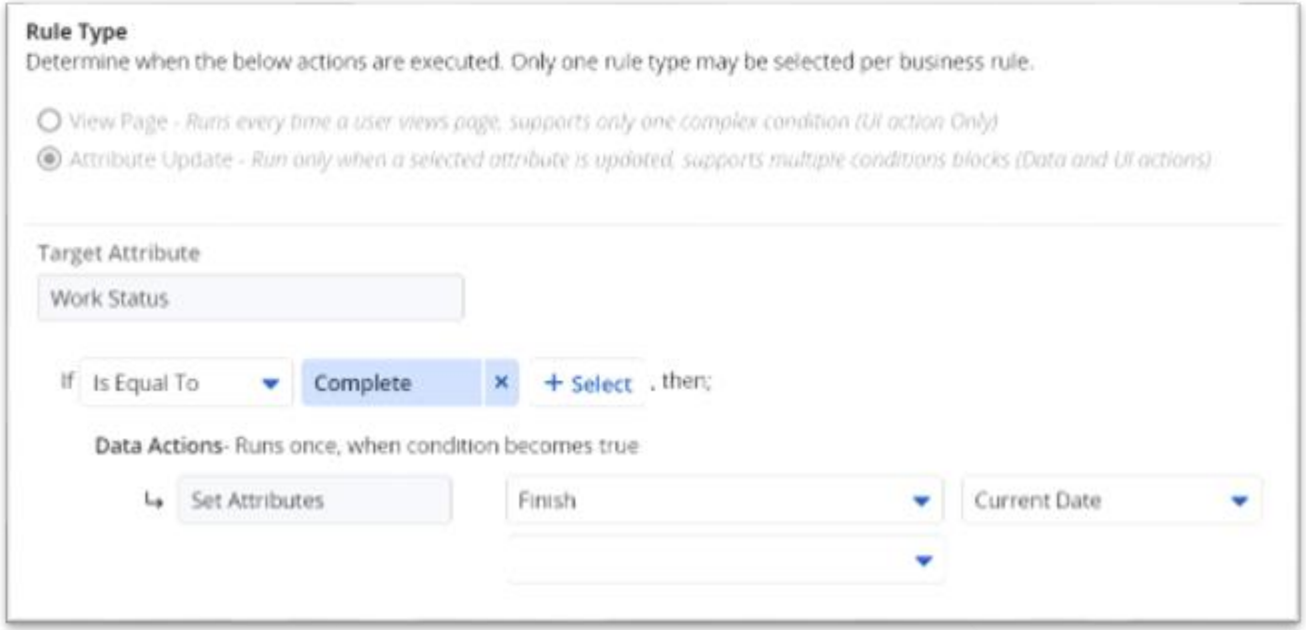
Rules

- 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

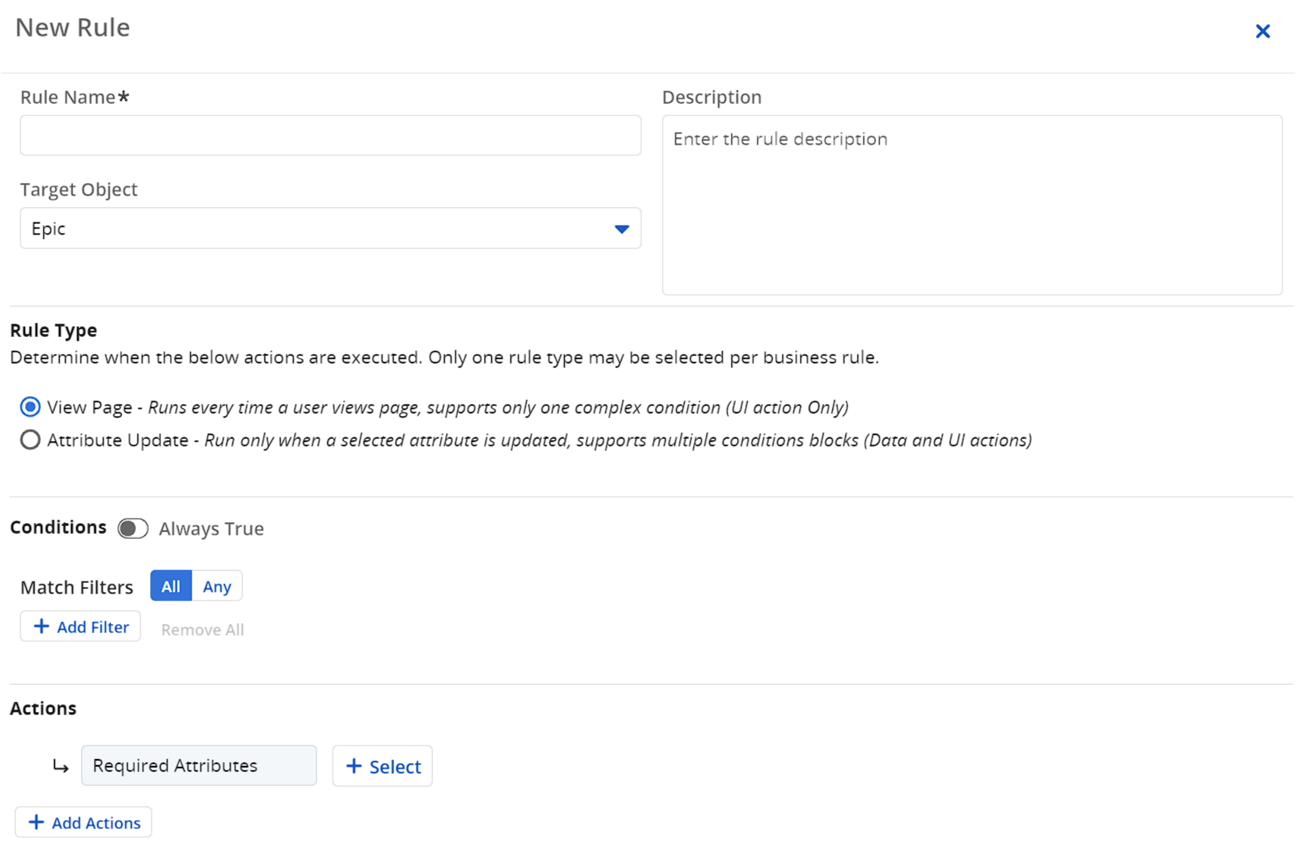
- Rules can now also implement logic according to attribute updates
  - Can produce **Data Actions** or **UI actions**
  - Can apply multiple actions per update
- Data Actions
  - Update data in one or more targeted attributes
  - Send Action Items
- UI Actions
  - Disable or hide elements
  - Make a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



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

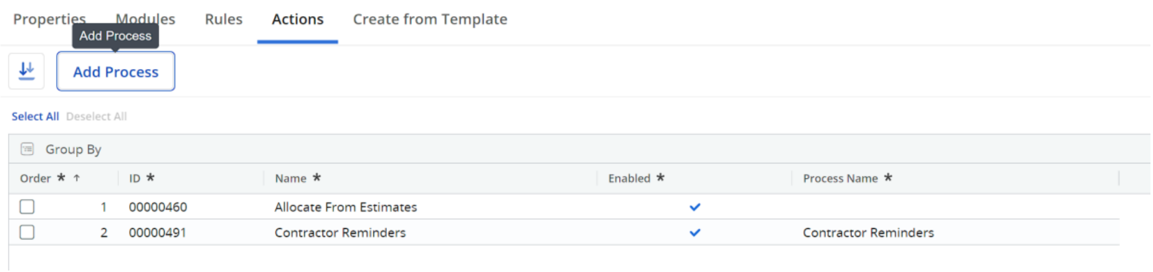
How to Create a Rule

- 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



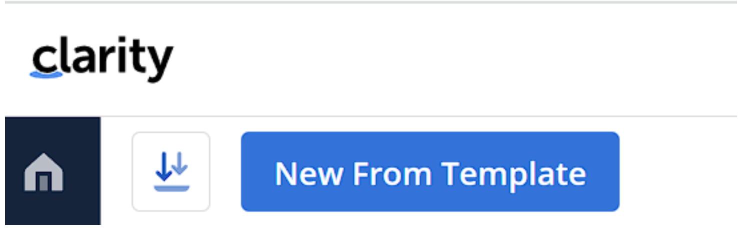
Actions

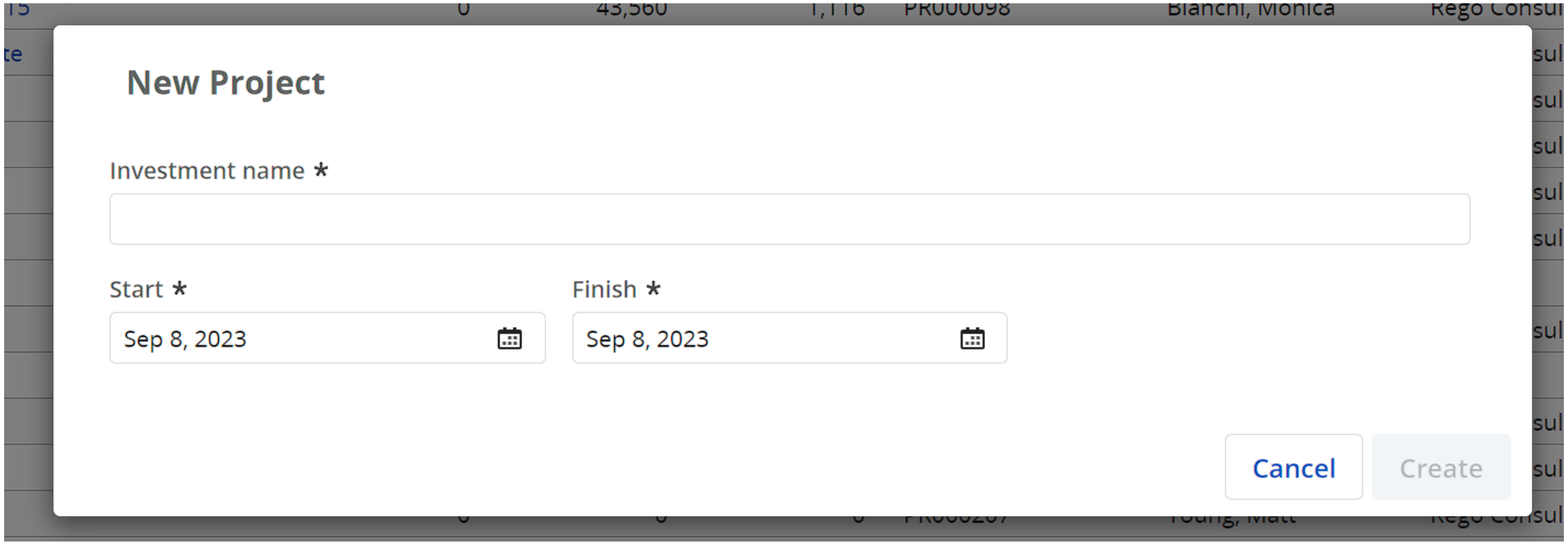
- Actions allow a user to kick off a process on demand
- Security needs to be done on the rule side of the blueprint
- Processes can be specific to the object OR non-object associated processes



Create from Template

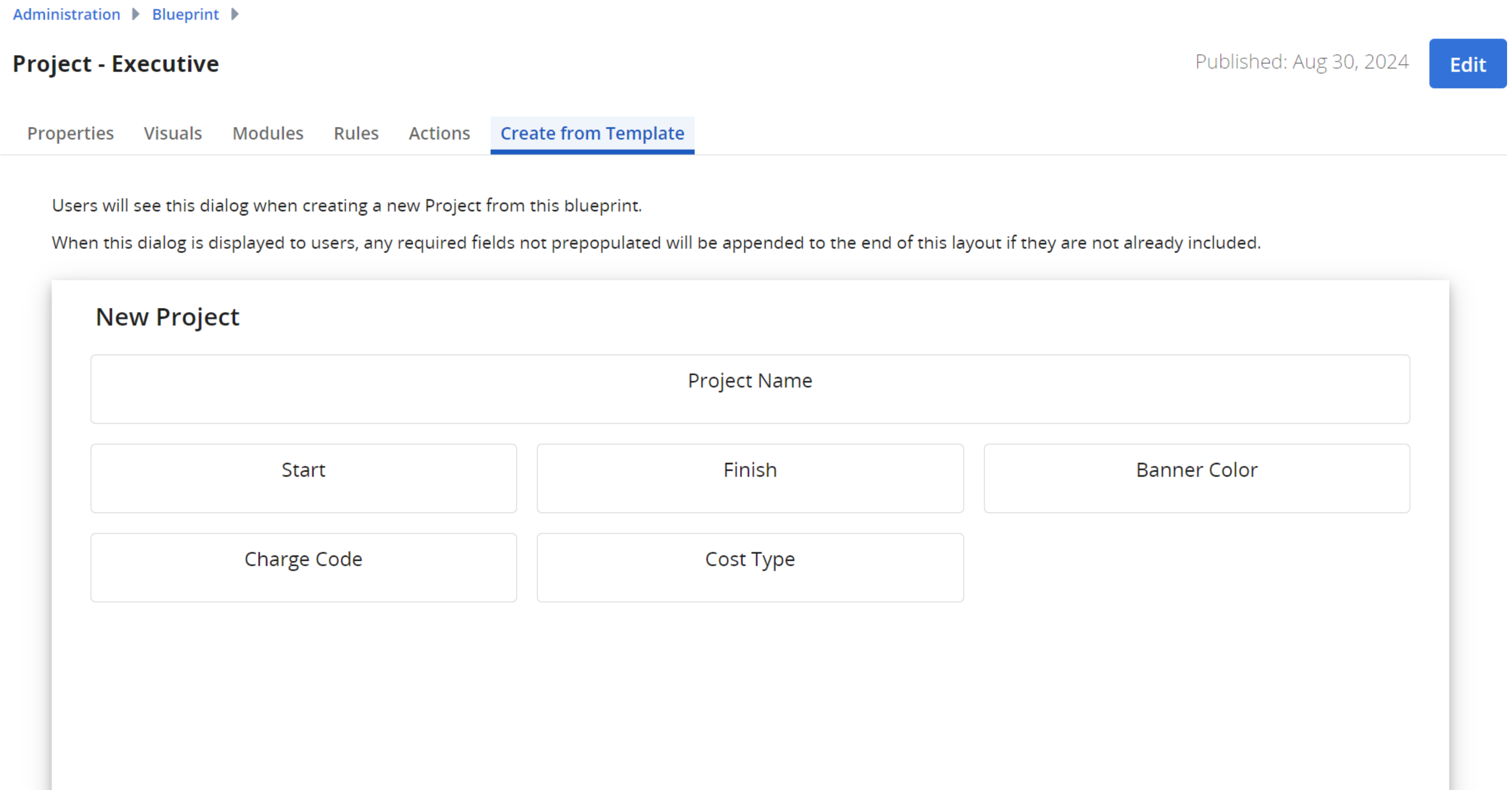
- Create from Template defines the Properties View when using Templates. This will allow for required attributes and additional attributes to be prompted to end users.





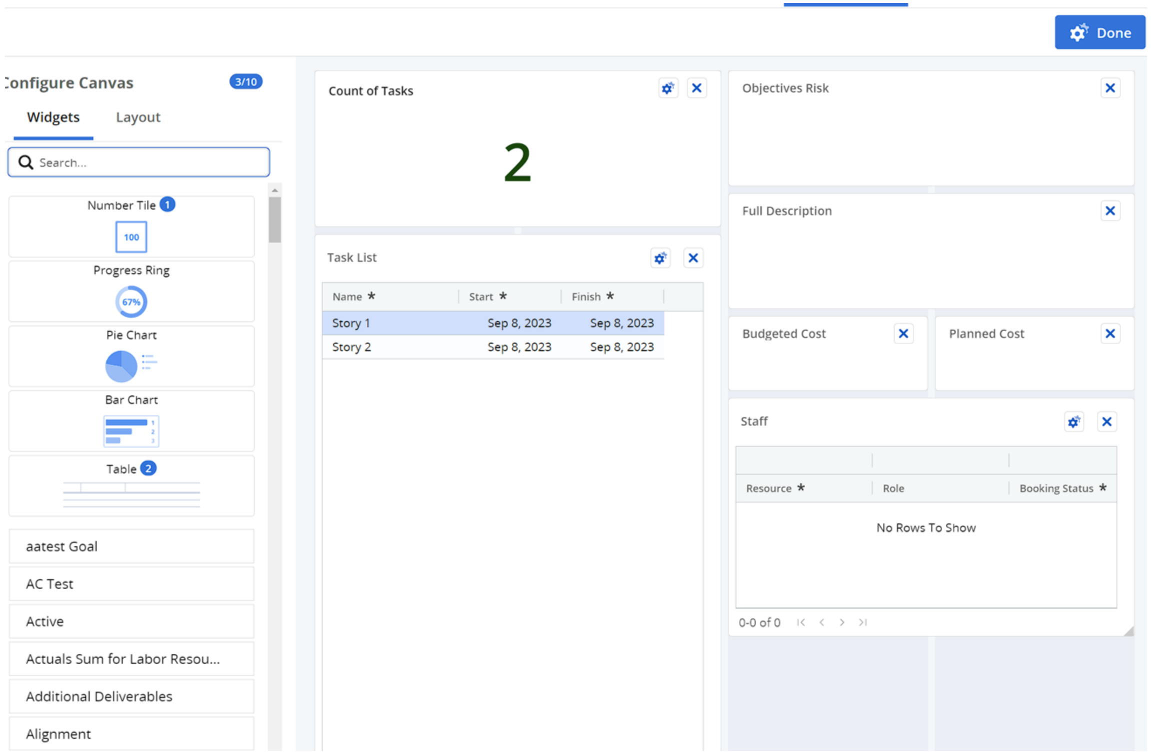
Customize Create From Template Blueprint

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



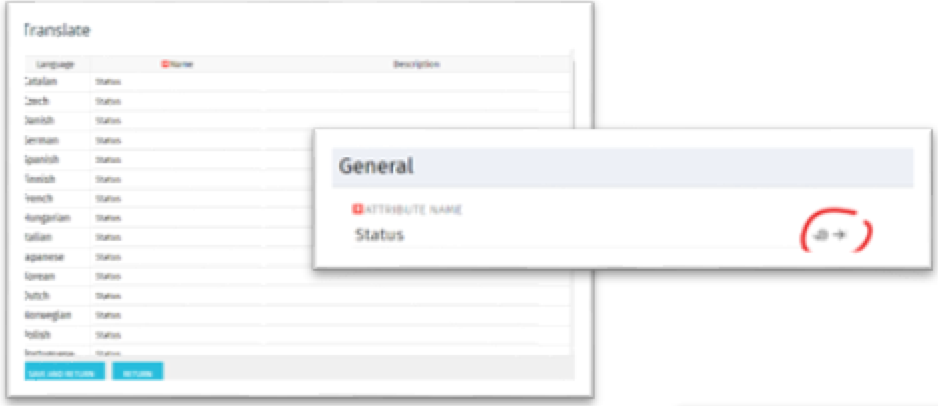
Canvas

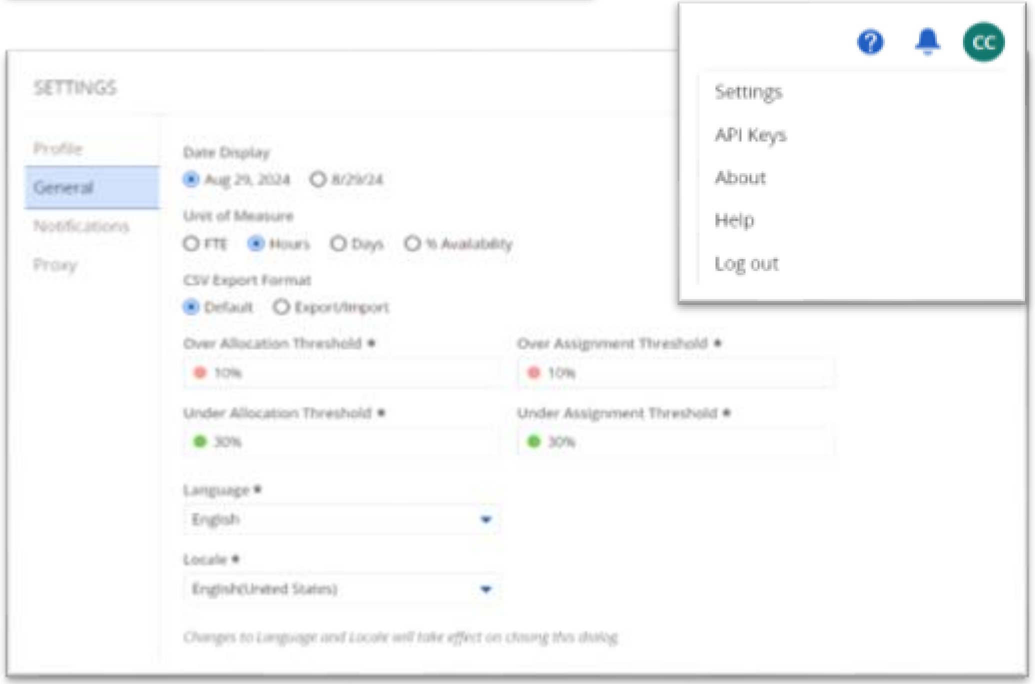
- Introduced in 16.1.0 (previously used for Status Reports only), the canvas. functionality allows you to create a new module that can be configured with fields from the master and sub objects
- Canvas allow grids, fields and widgets to provide Dashboard like experience to end users
- Canvas has 3 different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



Multilingual Translations

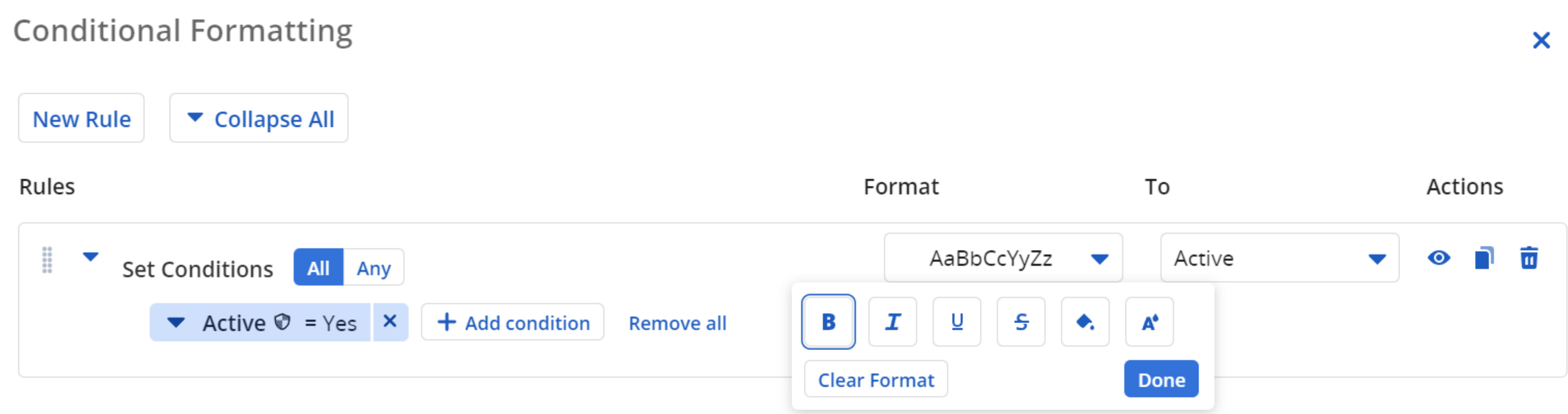
- Attribute translations can be configured in Studio (Classic UI)
  - All languages configurable in one place
  - Applies to attributes in both Classic and MUX
- All MUX translatable elements must be configured by switching languages for the logged-in user. This applies to:
  - Field Labels (Attribute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





Conditional Formatting

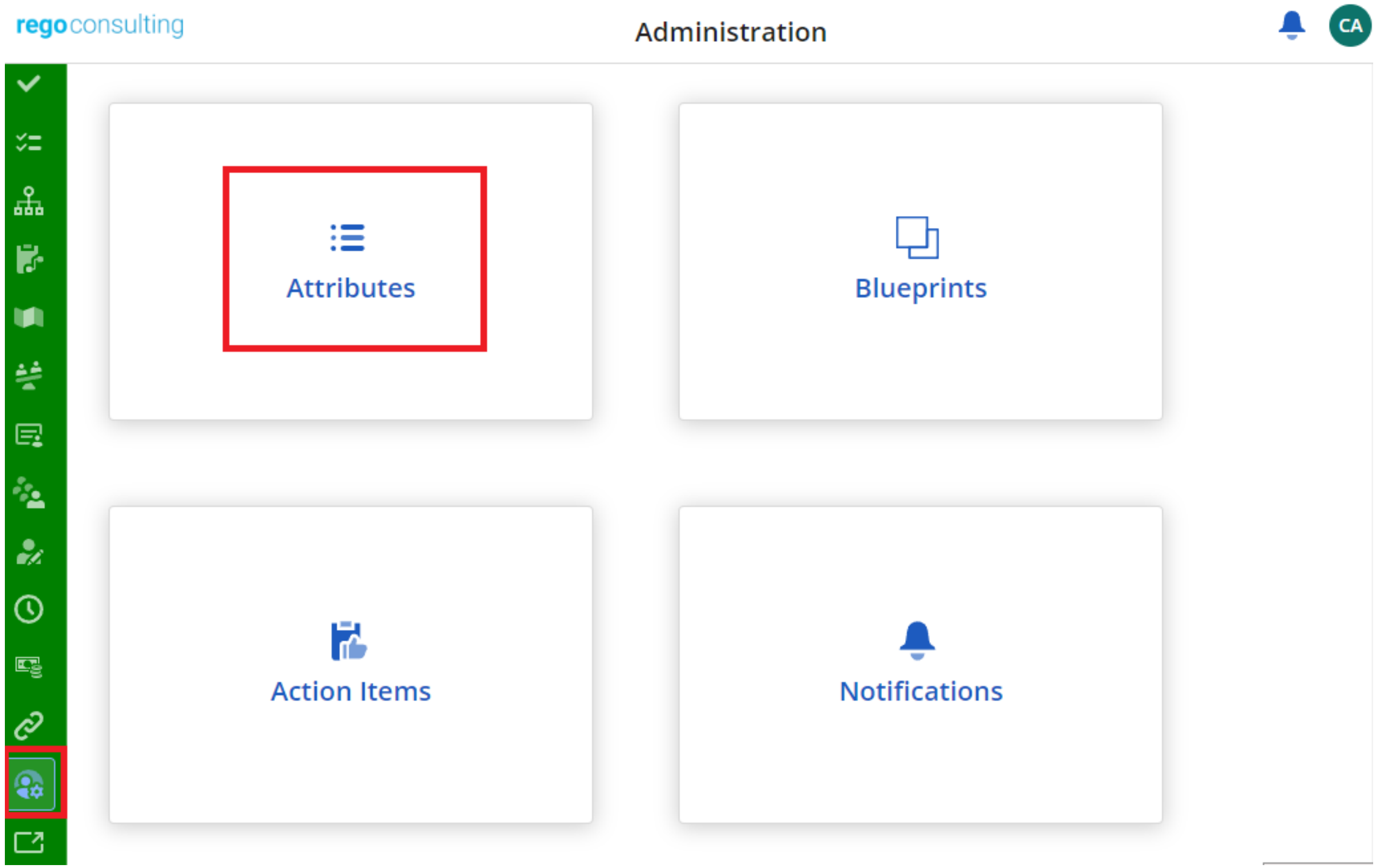
- Conditional Formatting is now available on the list areas in the modern experience as of 16.2
- Rules: Apply a positive test scenario
- Format: Applies the below to the To
  - Bold
  - Italics
  - Underline
  - Strikethrough
  - Background Color
  - Font Color
- To: What column should be affected by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



Attribute Administration

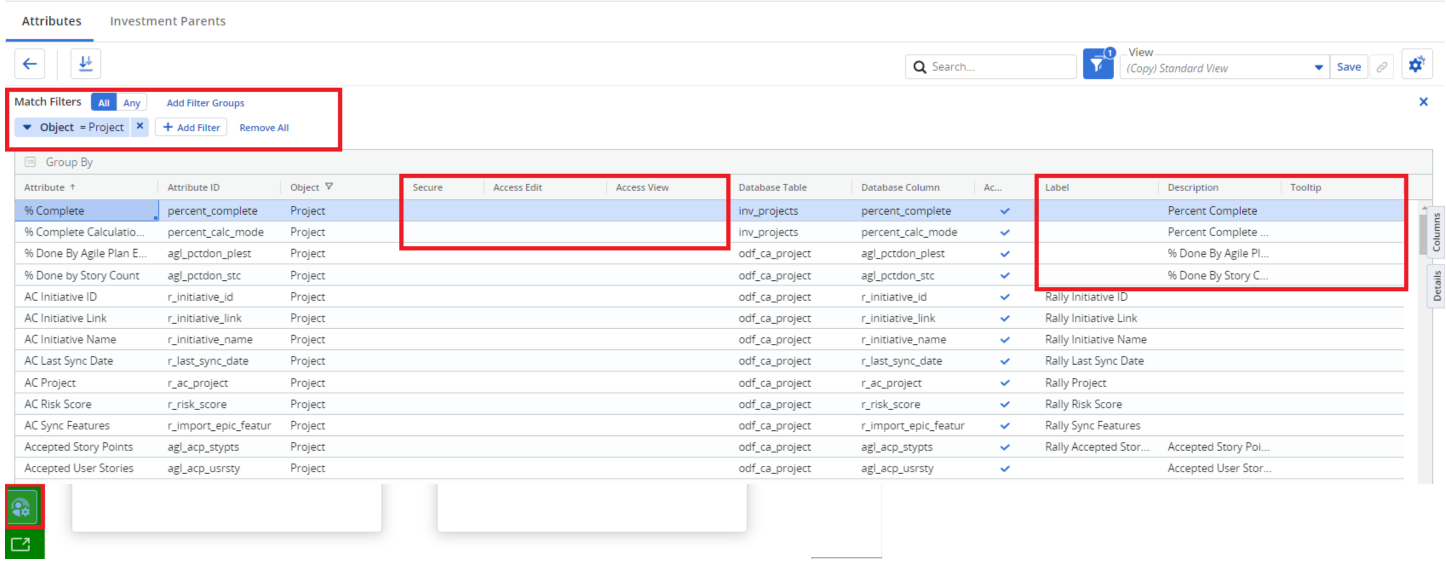
Attributes

- 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



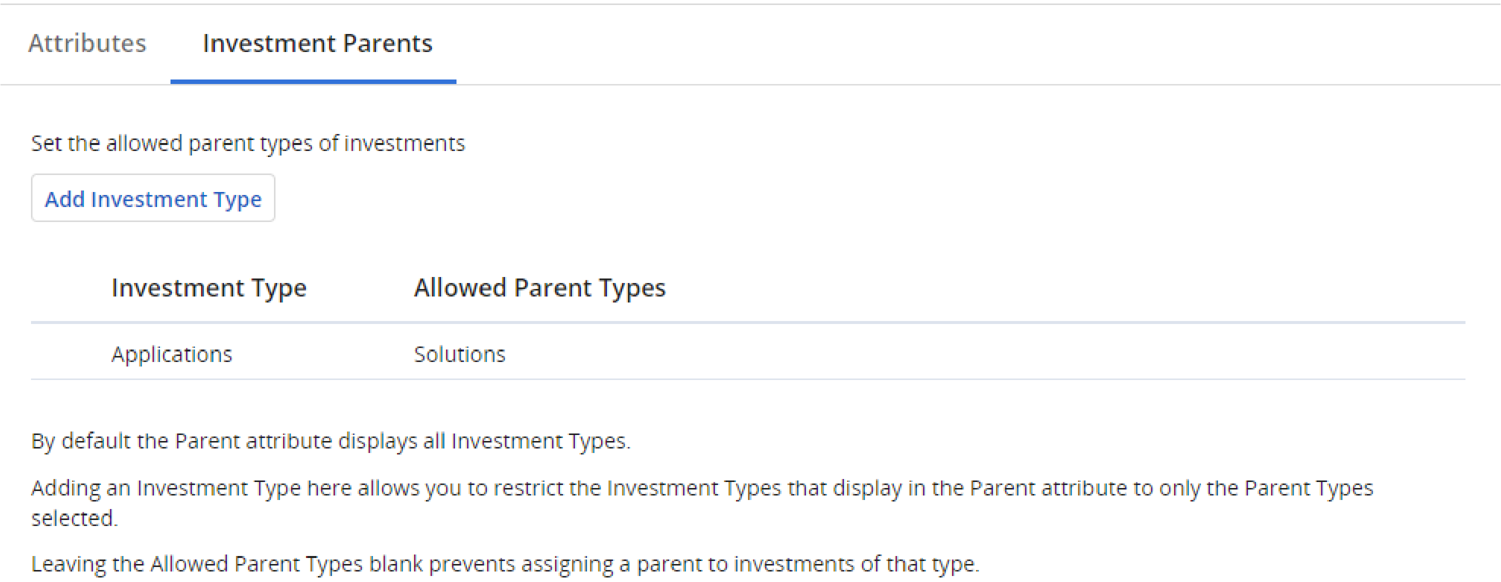
Attributes

- 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

- 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



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

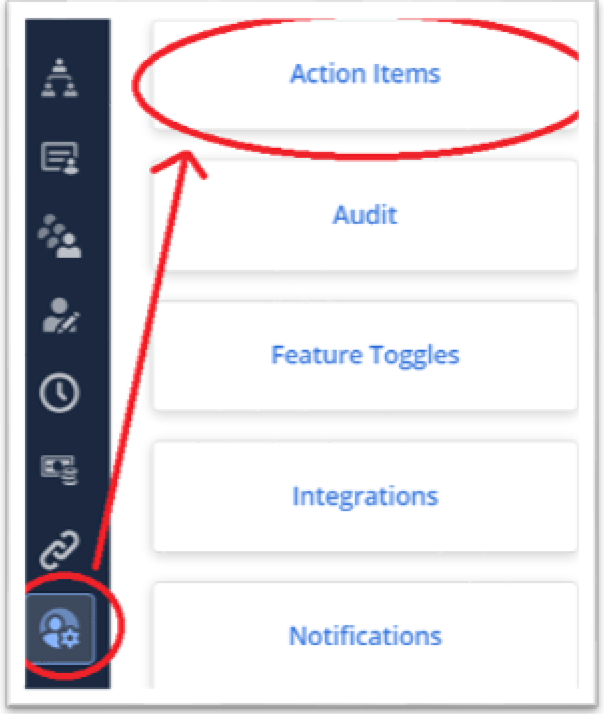
Other Administrative Functions

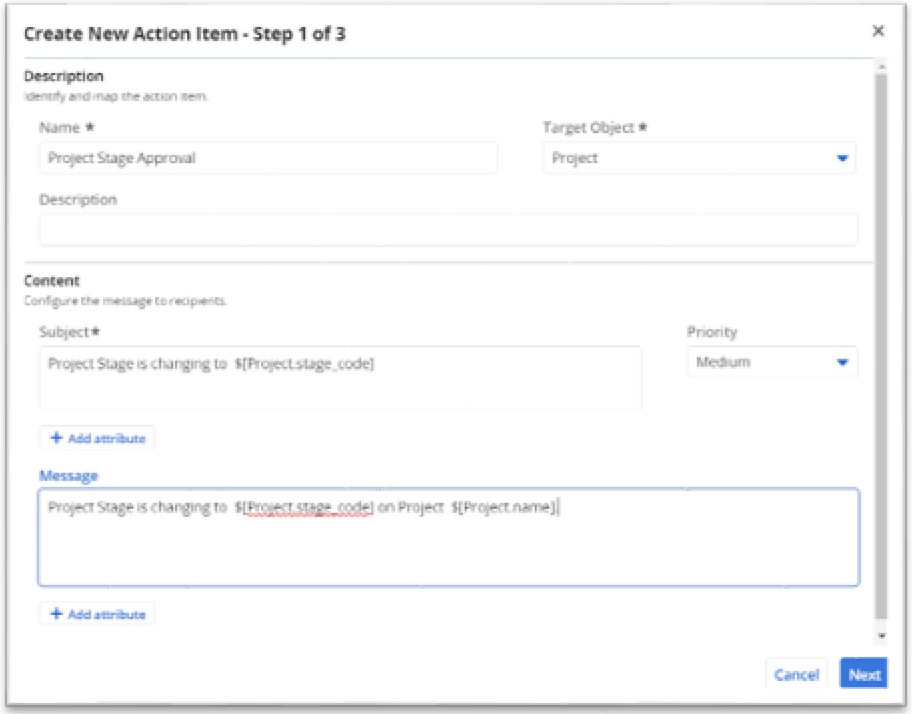
Auditing, Timesheet Rules, Action Items & Notifications

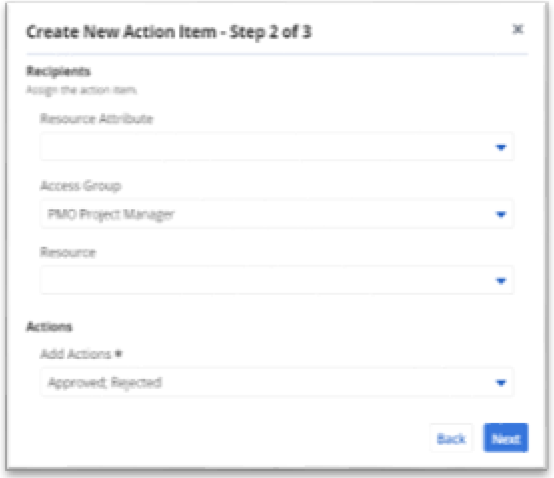
Action Items & Notifications (1)

Step 1: Define an Action Item

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







Action Items & Notifications (2)

Step 2: Define an Action Item Trigger

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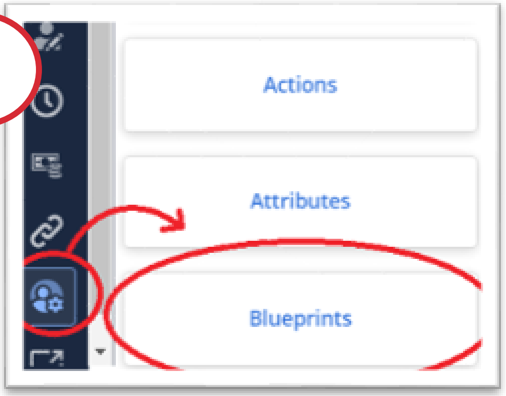

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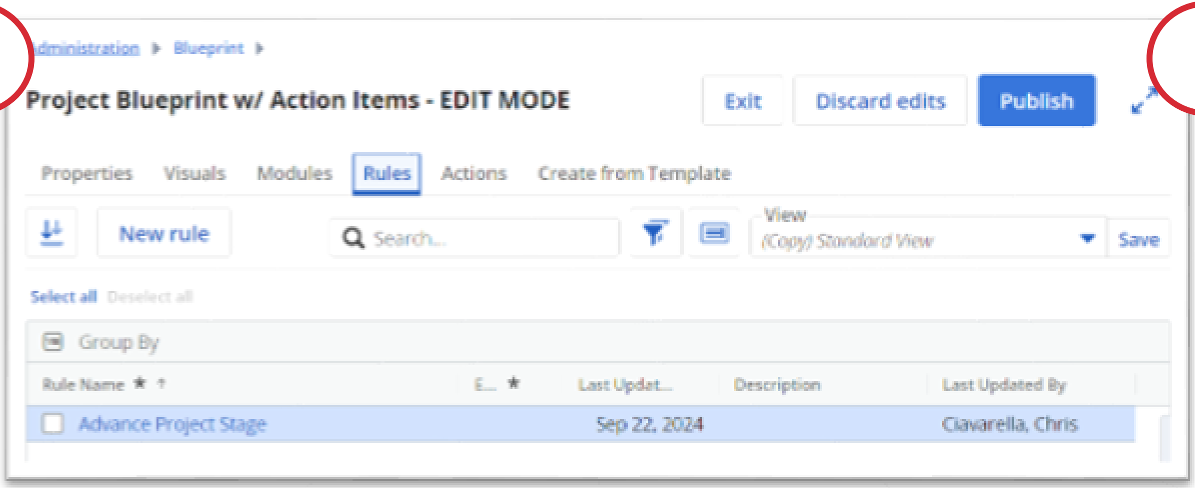

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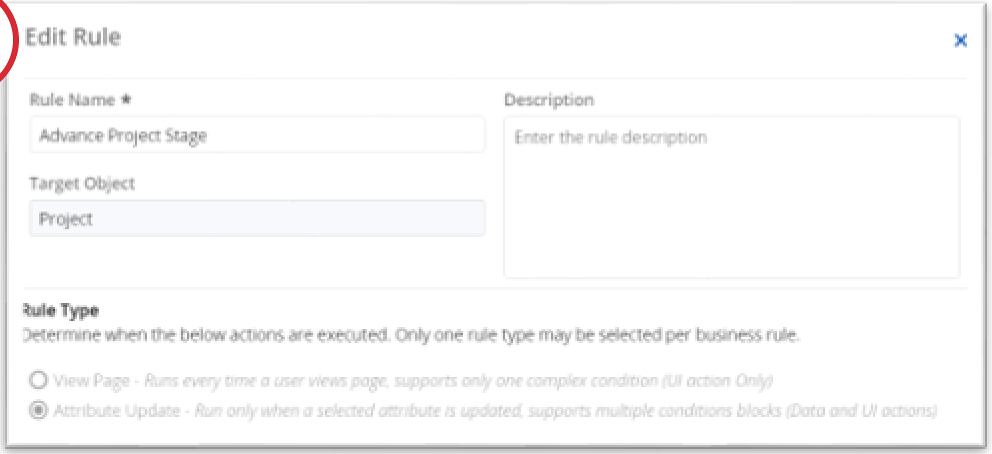

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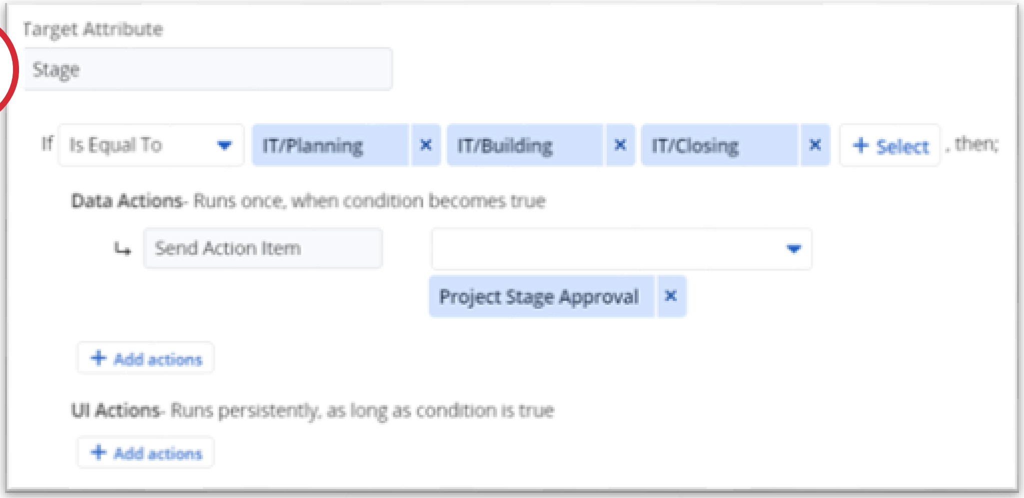
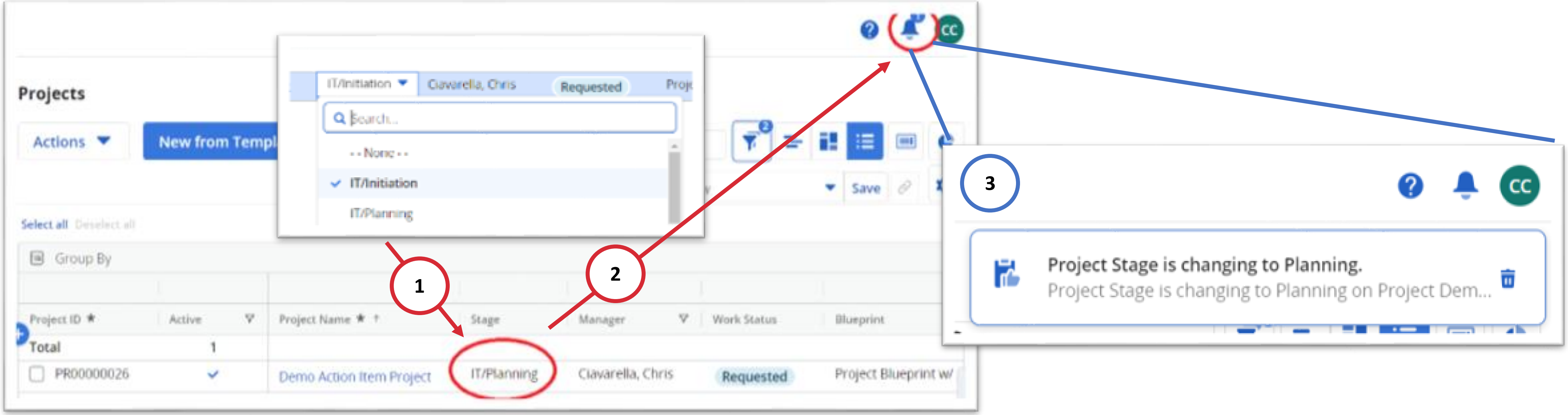


Action Items & Notifications (3)

Step 3: Trigger an Action Item

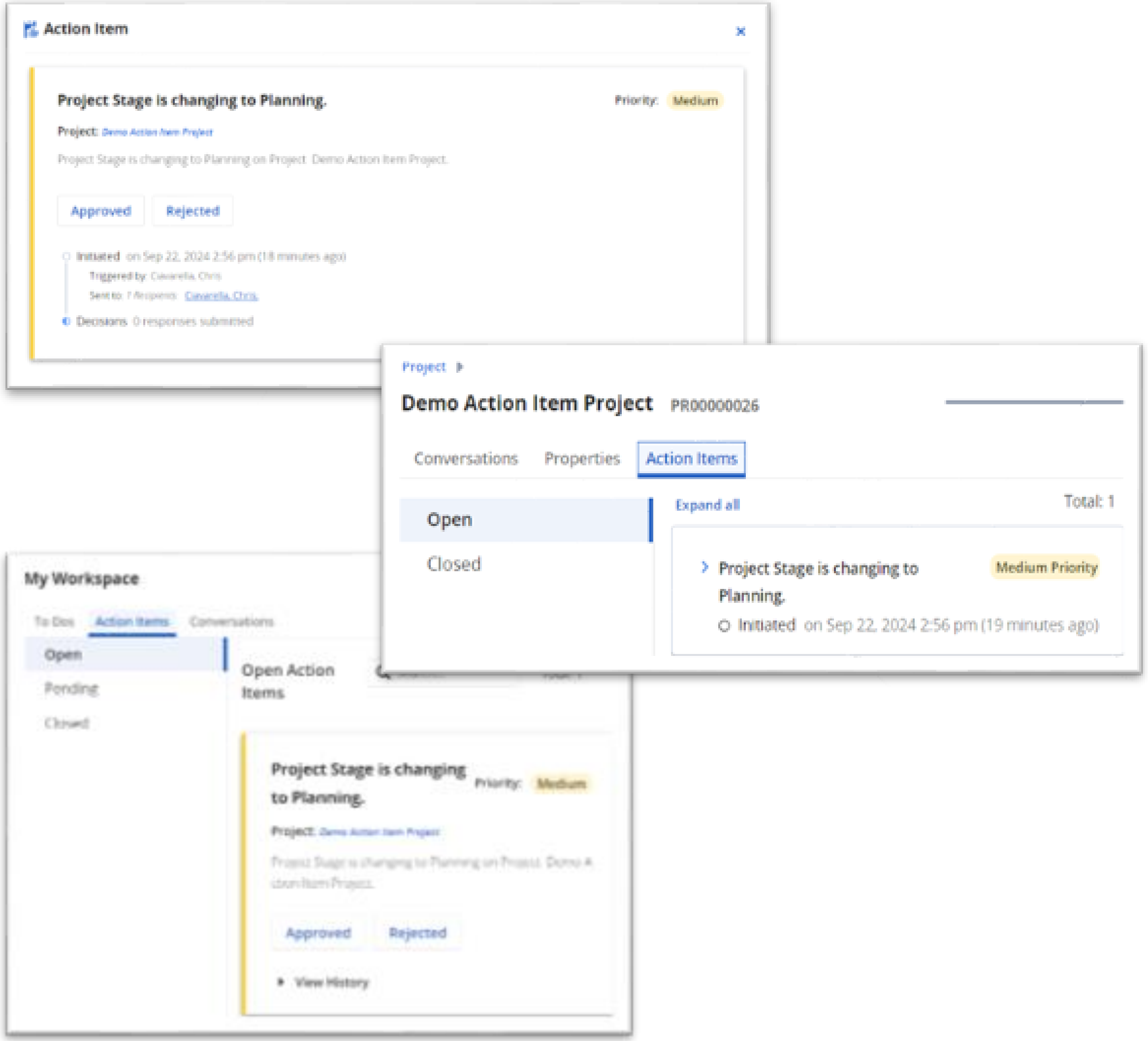


Action Items & Notifications (4)

Step 4: Respond to an Action Item

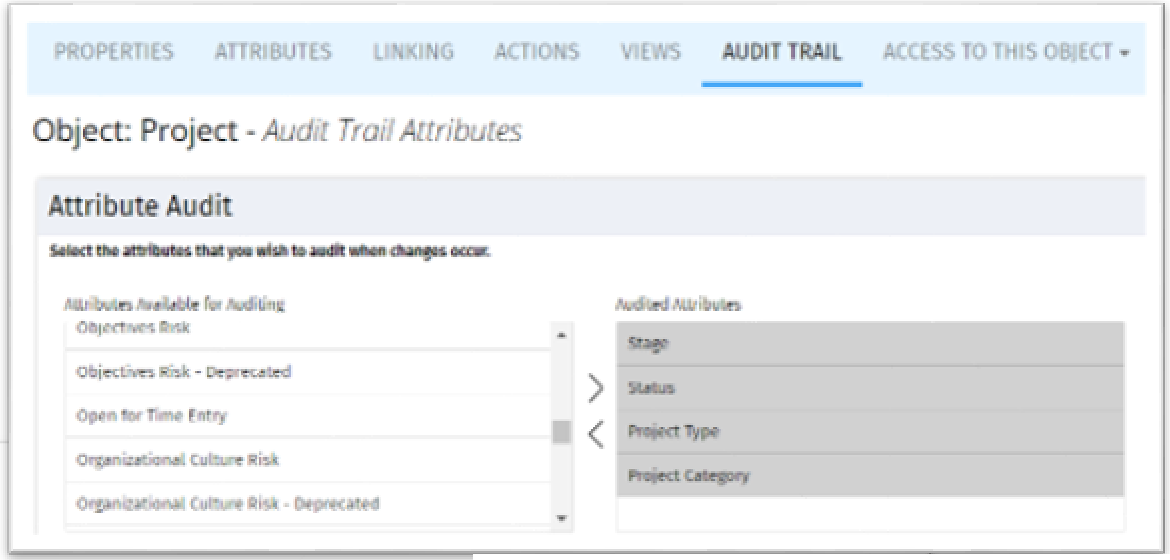
- Action Item assignees can respond to their Action Items in the following ways:

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

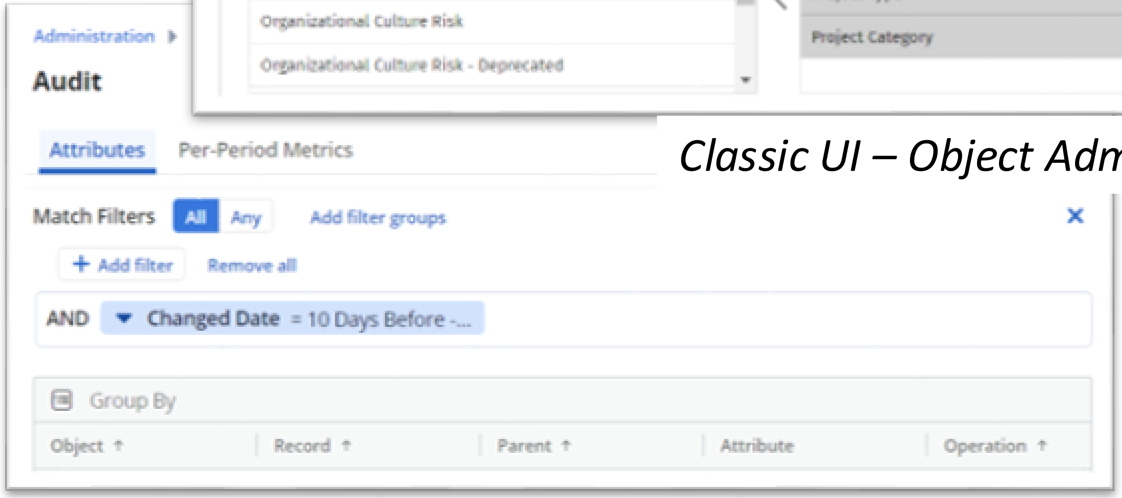


Audit

- 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



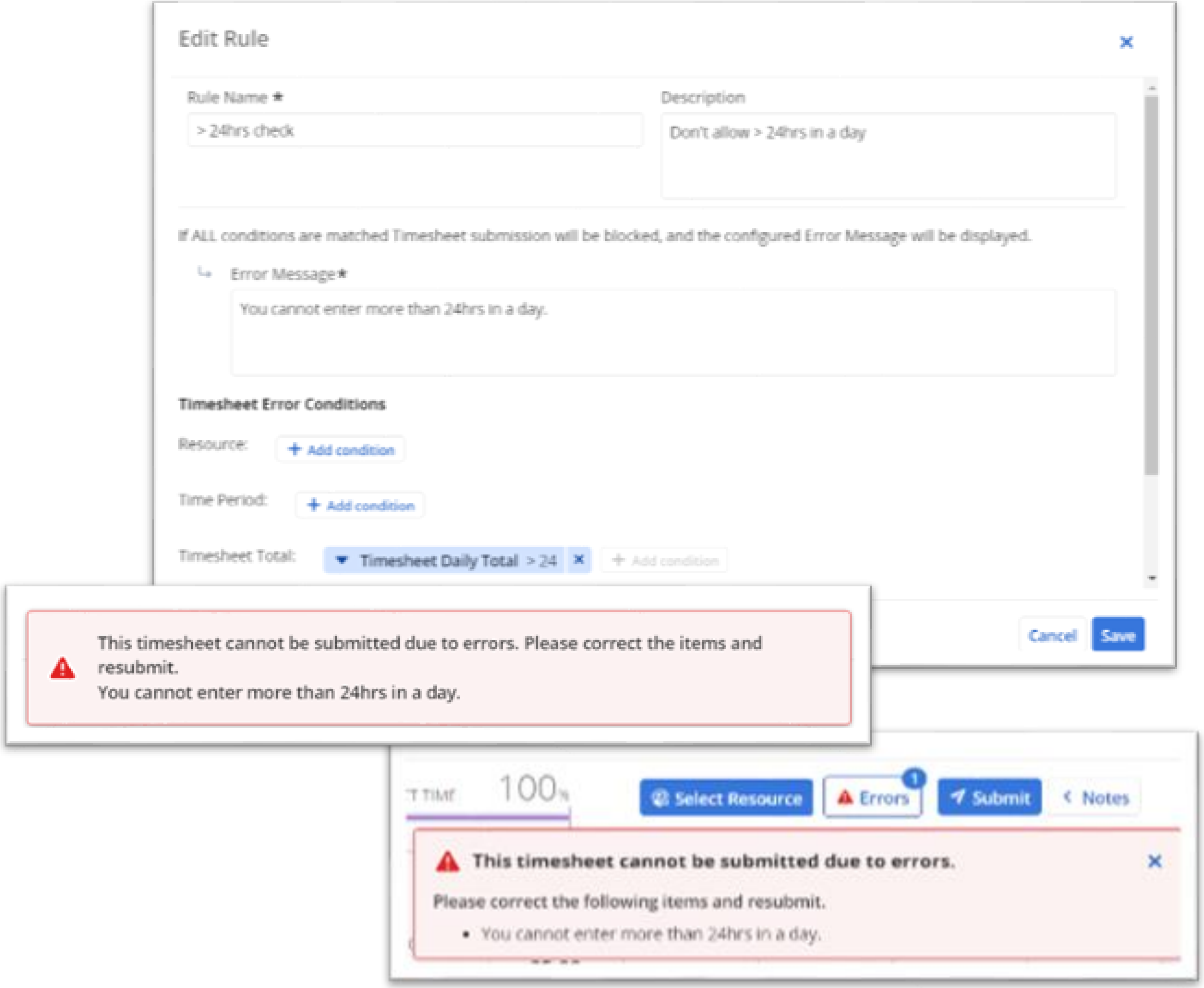
Classic UI – Object Administration



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)



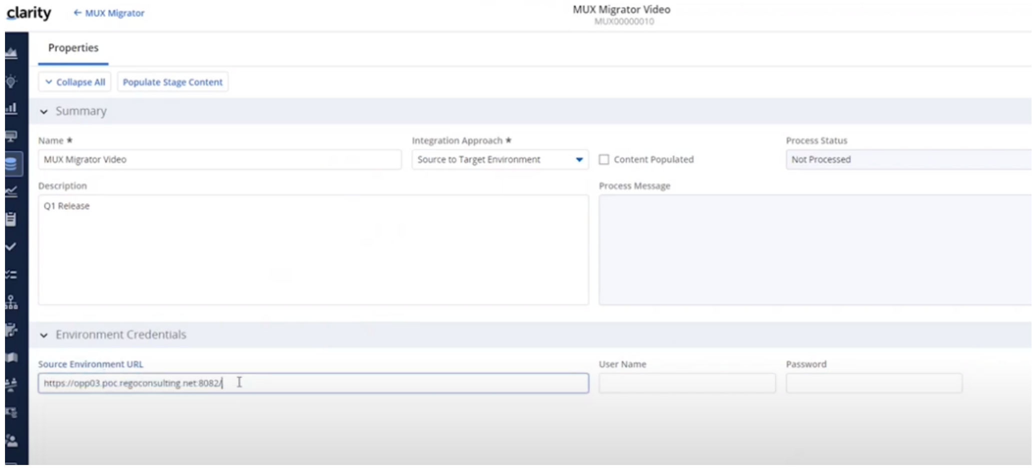
Considerations, Recommendations and Rego's MUX Migrator

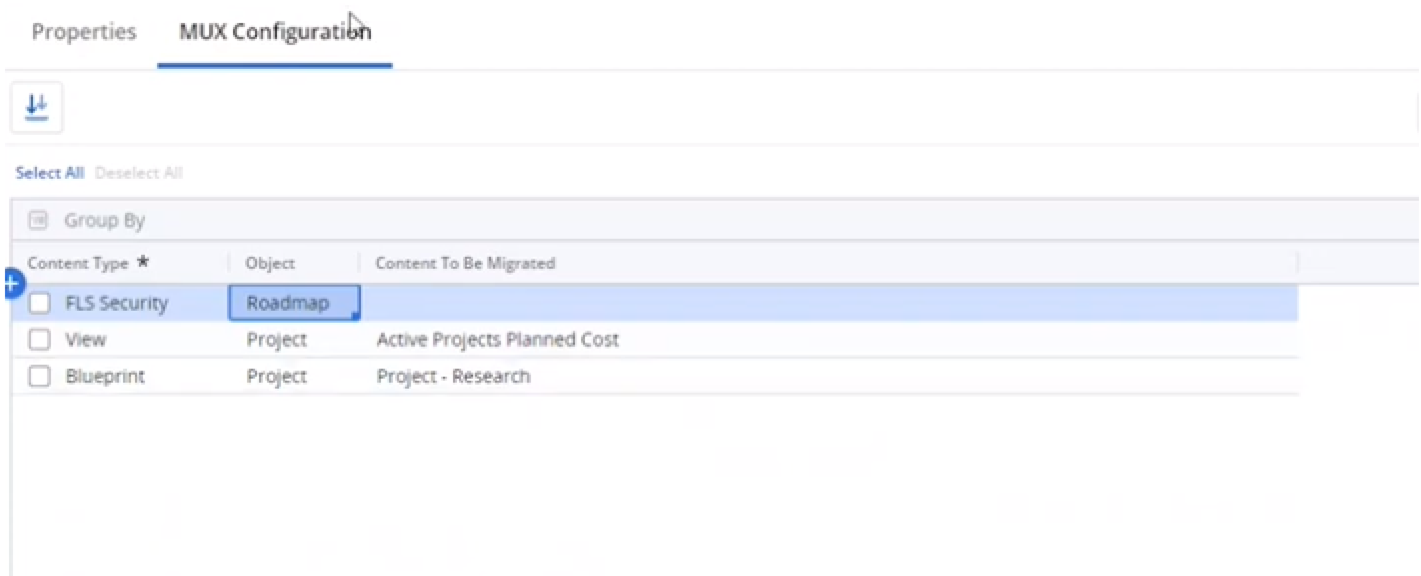
Considerations and Recommendations

- 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.





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