LAS VEGAS

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Modern UX Administration - Advanced

Your Guides:

Rahul Agrawal & David Zywiec

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aws

Introductions

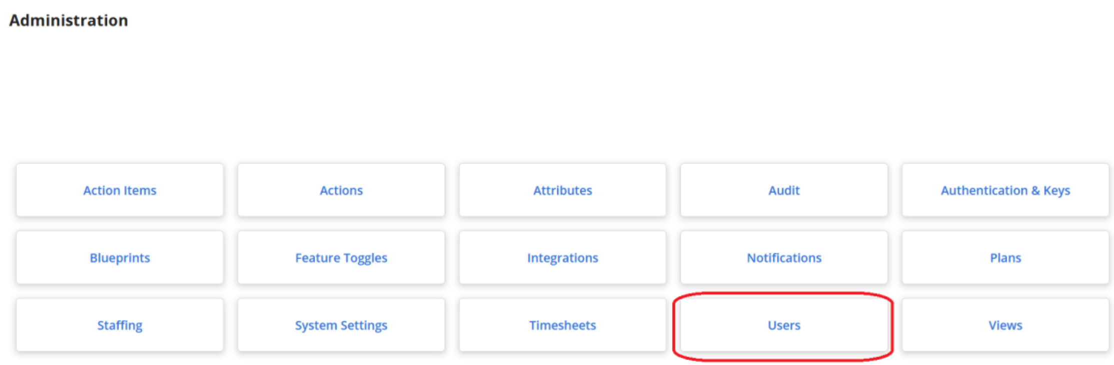
- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself

Agenda

- User Management
- Advanced Blueprinting
- Channels
- Canvas
- Advanced Configuration
- Advanced Filtering
- Action Items
- Audit
- Timesheet Rules
- Impersonation
- Pages Workaround

User Management

- Navigate to Administration for Users list
- Assign Groups
- Update Lock Status
- Export List



Group By

Last Name *	First Name *	Status *	Timezone *	Locale *	Language *	User Groups
Admin	PMO	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
Ranganathan	Anand	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
Anon	Andres	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
Alcala	Anthony	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
Thota	Avinash	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
Rimmasch	Ben	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
Werner	Bob	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
Hazelzet	Brian	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
CAMC	TEST USER	Active	(GMT-05:00) Easter...	English(United Stat...	English	Basic group for us...
Montanez	Carlos	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
Ciavarella	Chris	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
Test	User1	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...

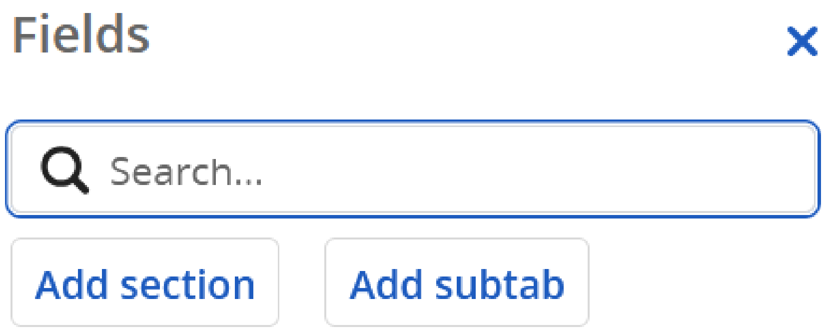
Advanced Blueprinting

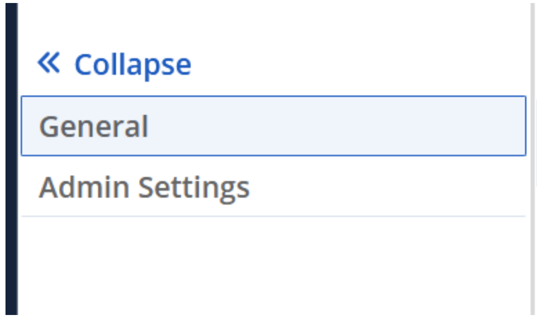
Attribute Update Vs Script

- 16.2 and Above
- Attribute Update if you are doing simple updates
- Anything with a flow should be a workflow/script

Subtabs

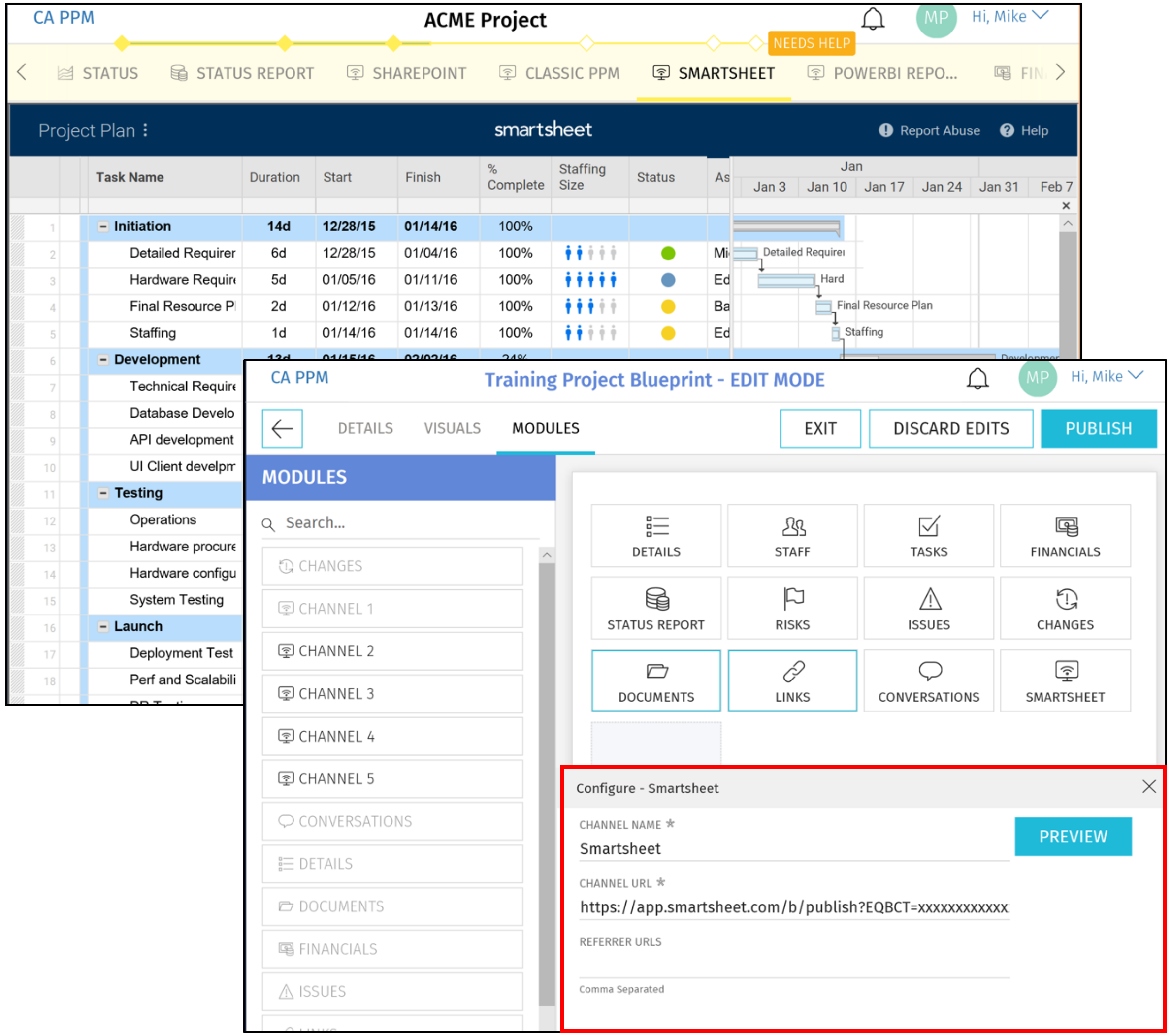
- 16.3
- Fields can not be on multiple tabs





Channels

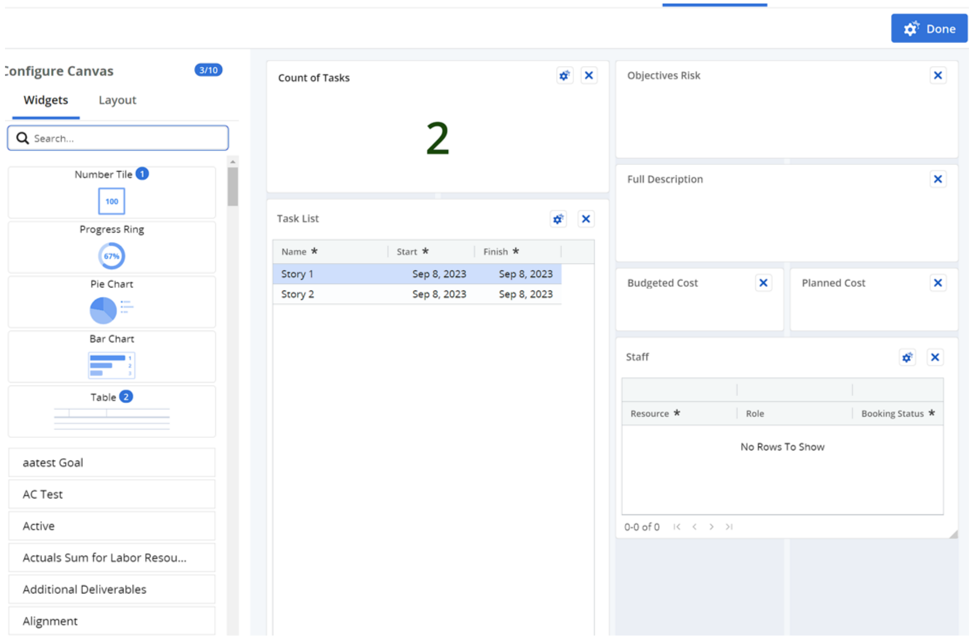
- Channels are configurable Modules which embed: Classic UI URLs (recommend Phoenix Theme and relative URLs) or External Applications
- Users can stay directly in Clarity and get the additional pertinent information
- Configuration
  - Channel Name
  - Channel URL
  - Referrer and SSO Configuration
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



Canvas

Canvas

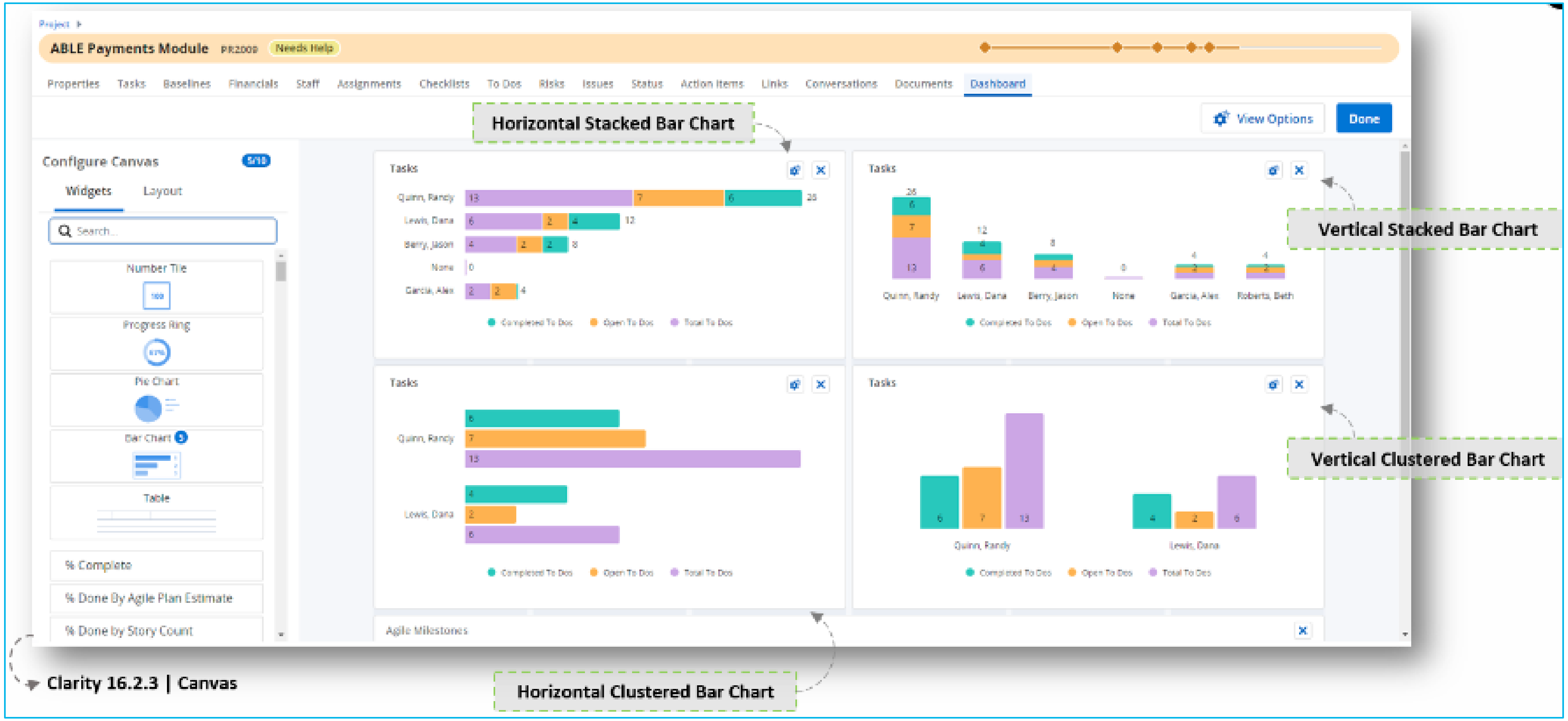
- Introduced in 16.1.0 (previously used for Status Reports only), the canvas functionality allows you to create a new module that can be configured with fields from the master and sub objects.
- Canvas allow grids, fields and widgets to provide Dashboard like experience to end users.
- Canvas has 3 different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



Display Multiple Metrics as Stacked or Clustered

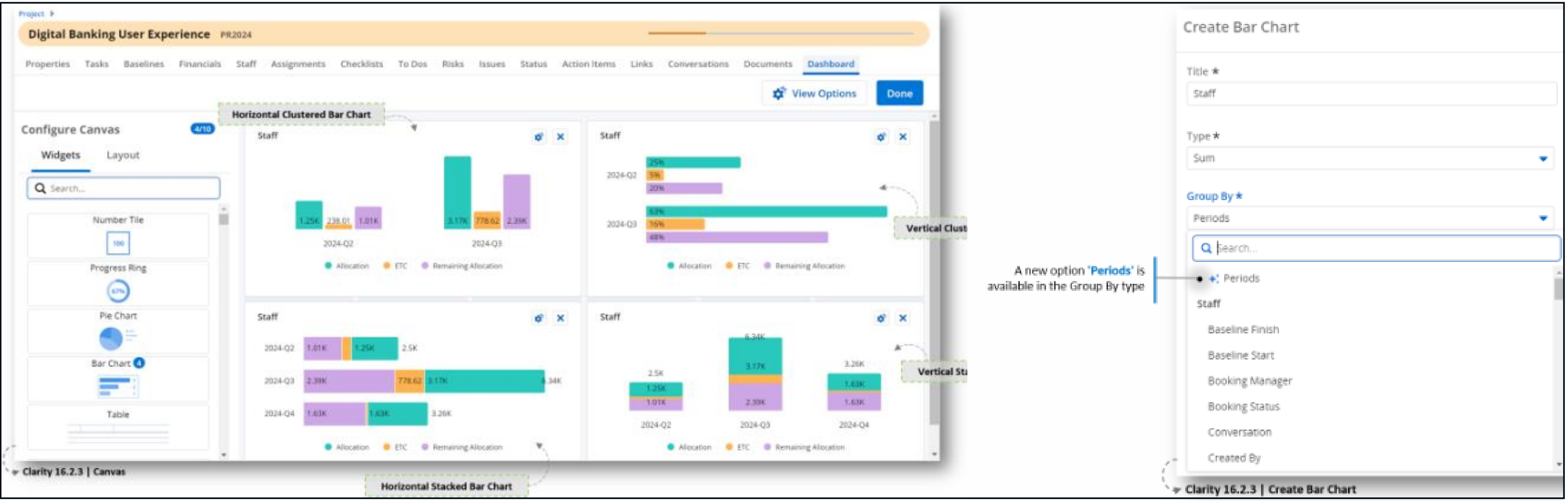
Previously, Canvas only supported Horizontal and Vertical Bar Charts.

In the 16.2.3 release, Stacked and Clustered bar charts were introduced.



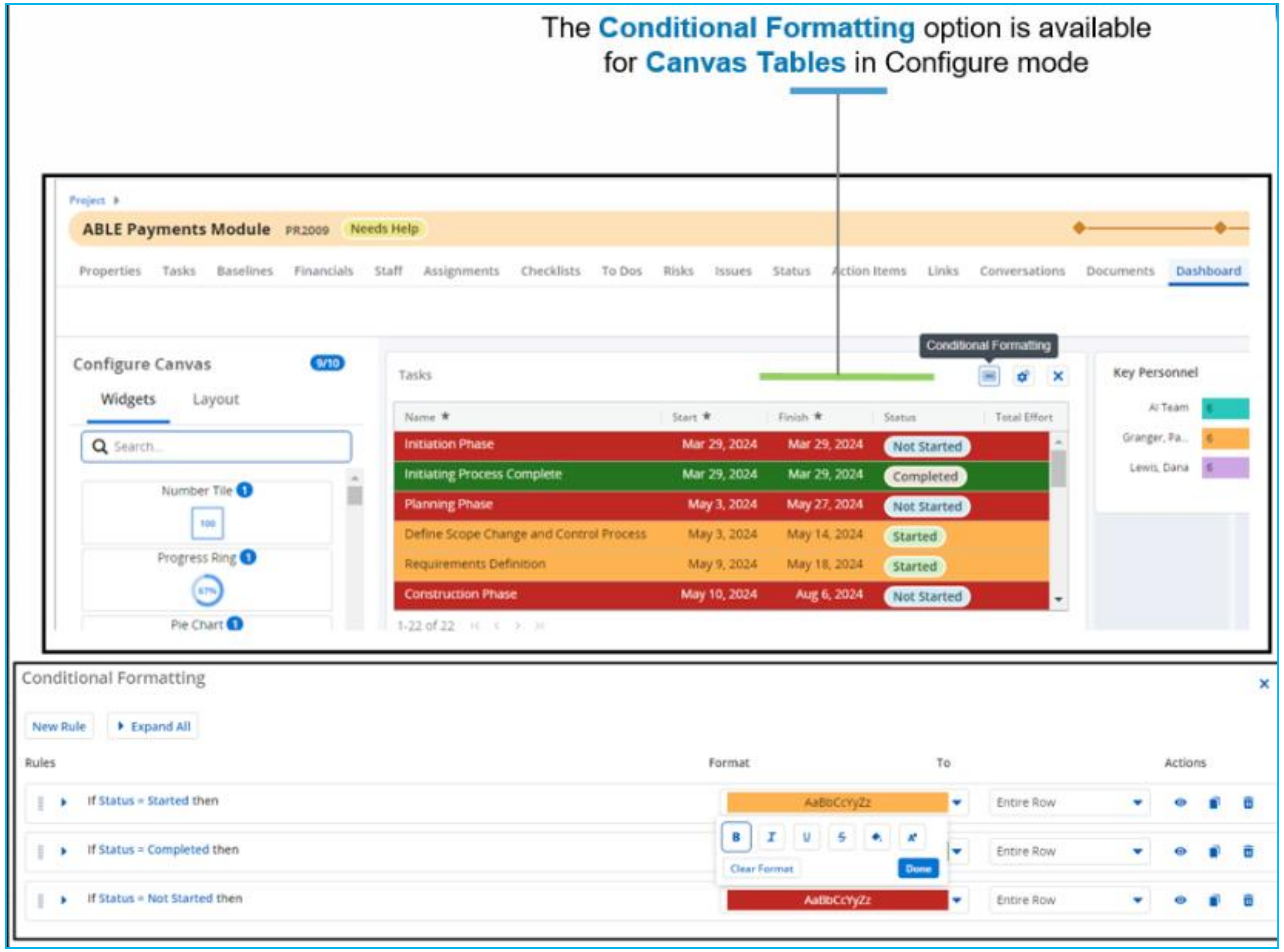
Display the Per-Period Metrics

Bar charts to display per-period metrics directly within Canvas can now be configured using new 'Group By Type.'



Introducing Conditional Formatting for Canvas

Similar to the previously released grid conditional formatting, this capability now exists in Canvas via Rules.



Advanced Configuration

Secure Per Period Metrics Attributes (16.3)

Any Time Scale Value (TSV) attribute (stock or custom) can now be secured through Administration Attributes. By default, TSV attributes are securable and unchecked.

Attributes

Attributes | Investment Parents

Search... | View: *All Attributes* | Save

Match Filters: All | Any | Add filter groups

Object = Financials ✕ | + Add filter | Remove all

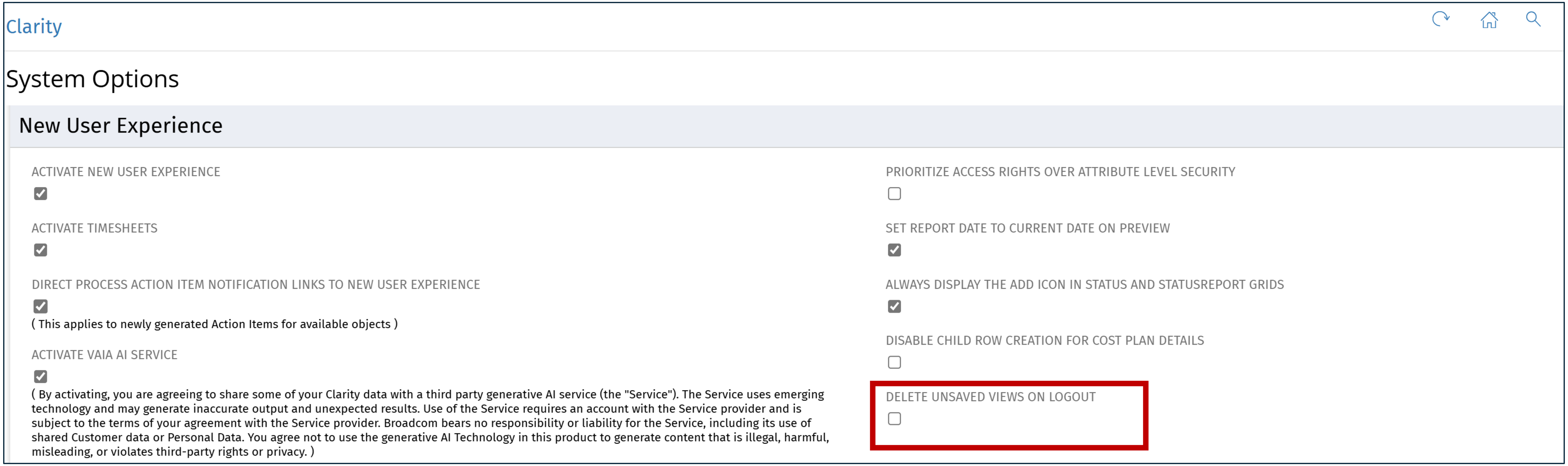
Group By

Active	Secure	Attribute ↑	Attribute ID	API Attribute ID	Not Securable	Label	Object
✓		Actual Capital Cost	actual_cst_cap	actualCapitalCost			Financials
✓		Actual Cost	actual_cst	actualCost			Financials
✓		Actual Operating Cost	actual_cst_op	actualOperatingCost			Financials
✓		Budget Actual Benefit	budget_actual_benefit	budgetActualBenefit			Financials
✓		Budget Actual Revenue	budget_actual_rev	budgetActualRevenue			Financials
✓		Budget Benefit	budget_benefit	budgetBenefit			Financials
✓		Budget Capital Cost	budget_cost_cap	budgetCapitalCost			Financials
✓		Budget Cost	budget_cost	budgetCost			Financials
✓		Budget equals Planned	is_fcst_eq_bdgt	isBudgetEqualsPlanned			Financials
✓		Budget Operating Cost	budget_cost_op	budgetOperatingCost			Financials
✓		Budget Revenue	inv_budget_revenue	budgetRevenue			Financials
✓		Budgeted Benefit	budget_rev_total	budgetBenefitTotal			Financials
✓		Budgeted Benefit Finish	budget_rev_finish	budgetBenefitFinishDate			Financials
✓		Budgeted Benefit Start	budget_rev_start	budgetBenefitStartDate			Financials

Columns | Details

Delete Unsaved Views

Clarity administrators can now use the **Delete Unsaved Views on Logout** option in System Options to ensure that Clarity deletes unsaved views when a user logs out.

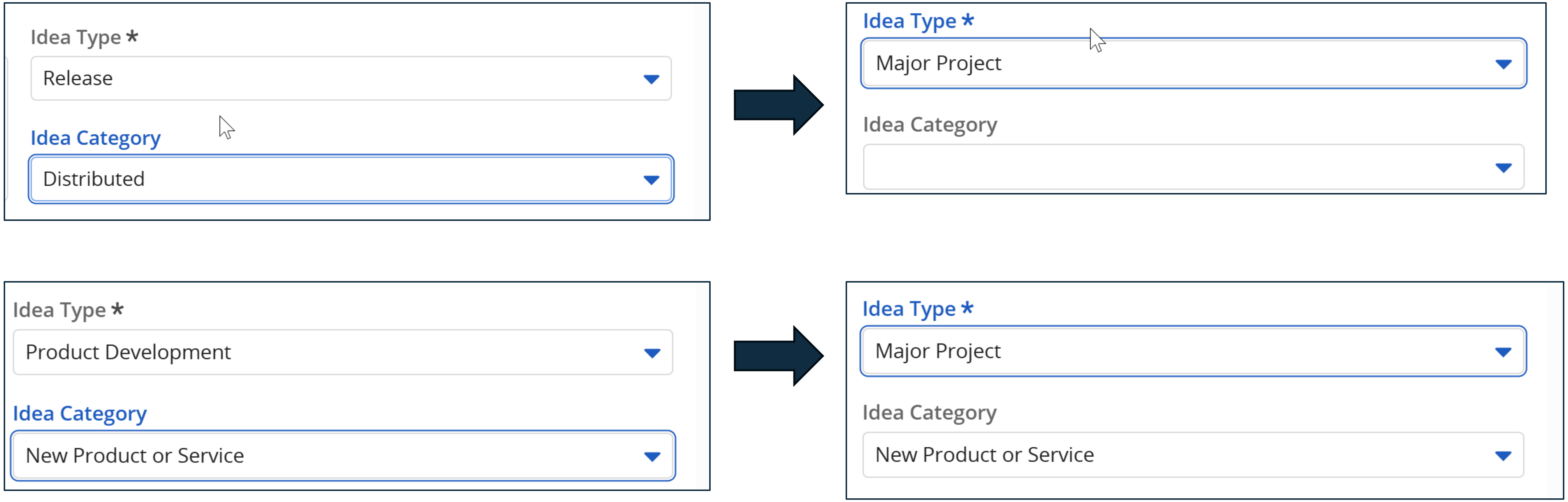


Enhancements to Parameterized Lookups

In previous versions of Clarity, the system did not prompt users to consistently update their selection in the parameterized lookups across all components. In this release, whenever you update the source field, Clarity will perform the following actions:

- If the current value in the parametrized lookup is valid and the source is changed, Clarity will not clear the lookup. If the value is invalid, Clarity will clear the lookup.
- If the parameterized lookup is read-only and the source attribute is changed, Clarity will clear the parameterized lookup.
- If the parameterized lookup is secured using FLS, and the source attribute is changed, Clarity will clear the parameterized lookup.
- If the parameterize lookup is a required attribute and the source is changed, Clarity will not clear the lookup if the value is relevant. Otherwise, it will clear the values in the Clarity UI.

Enhancements to Parameterized Lookups (Continued)

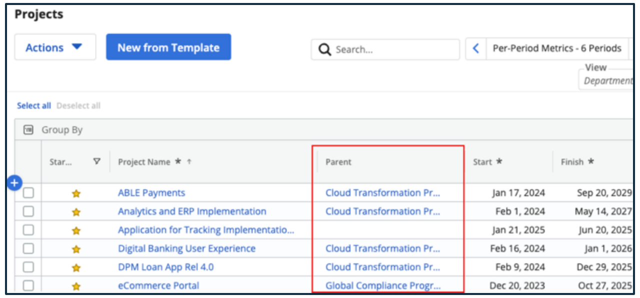


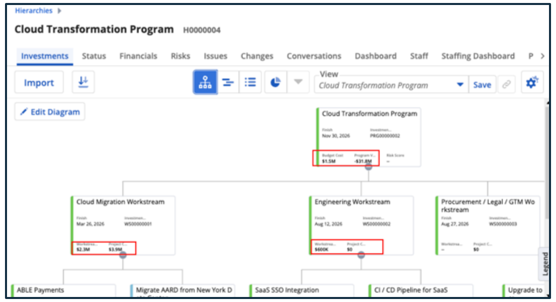
Include Actuals from Children in Cost Plans and Budgets

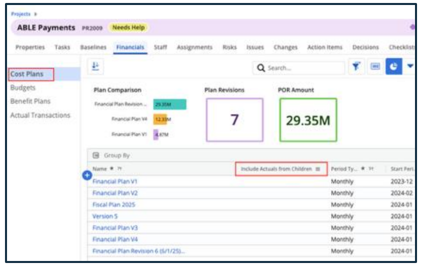
Clarity introduced a new attribute in Cost Plans and Budgets: **Include Actuals from Children.** This feature allows users to aggregate actuals from child investments into the parent investment's cost plan/budget.

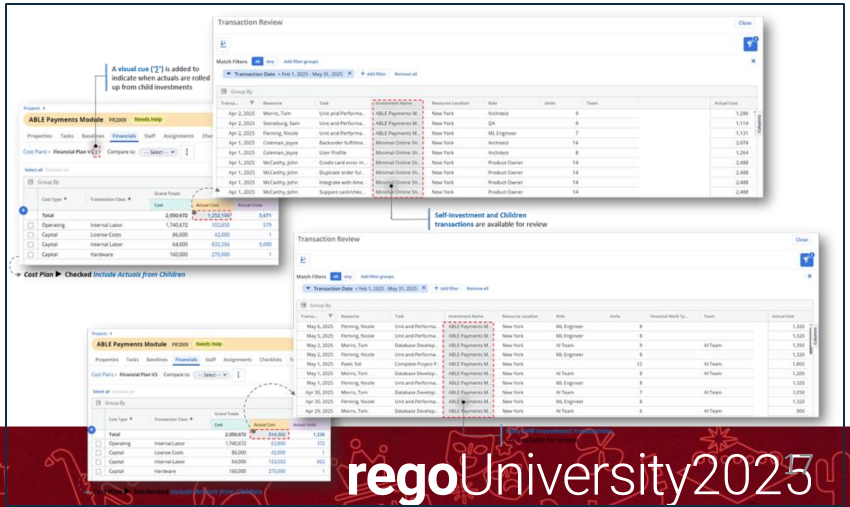
Highlights:

- **Hierarchy-Based Aggregation:** The investment hierarchy is defined using the existing parent attribute. This relationship identifies child investments whose actuals are aggregated into the parent's cost plan/budget.
- **Include Actuals from Children attribute:** Control whether actuals from child investments are included in the parent cost plan/budget.
- **Job Driven Update:** When you enable Include Actuals from Children and run the Update Financial Plan Actuals and Forecast job, actuals from child investments are rolled up and added to the parent investment's cost plan/budget.
- **Visual Indicator:** ('∑') displays when actuals are rolled up from Child Investments
- **Transaction Review:** Drilling into the Actuals amounts on the Cost Plan/Budget Details page will display transactions from both the parent and child investments when the Include Actuals from Children field is checked.





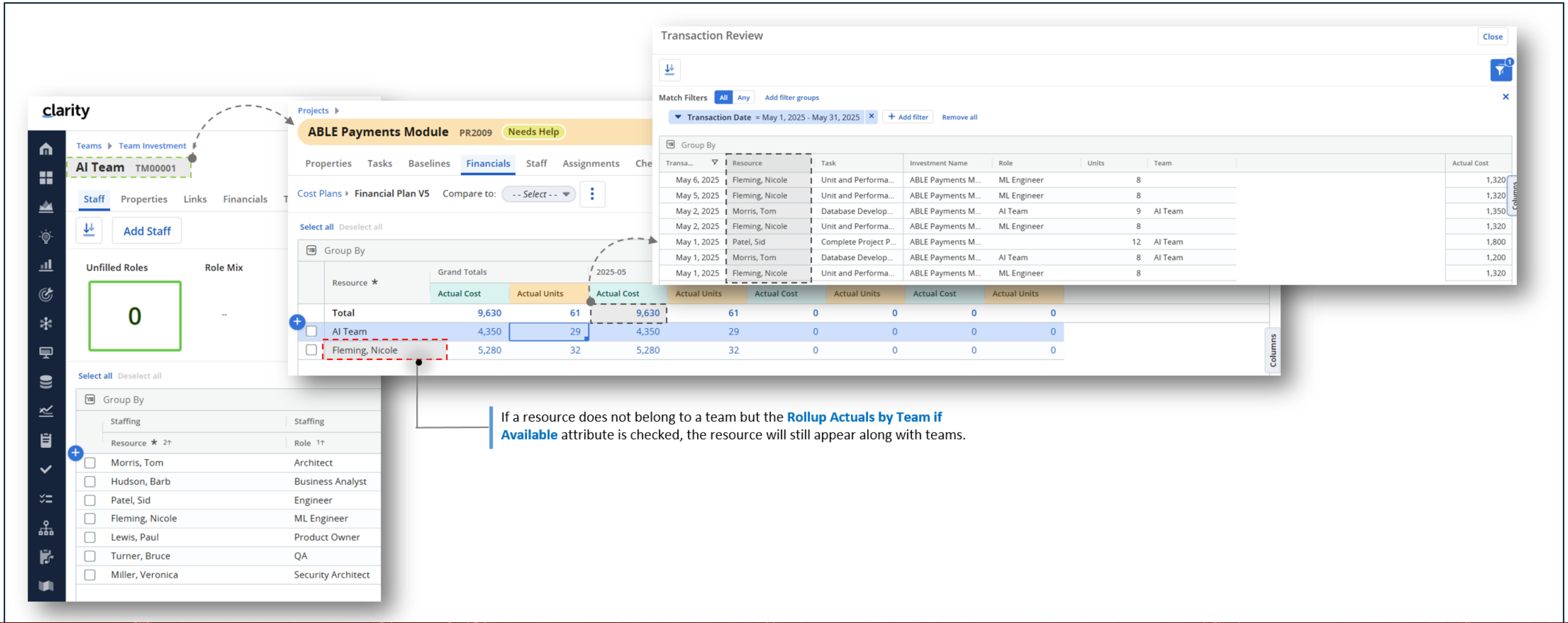




Rollup Actuals by Team if Available in Cost Plans & Budgets

When you enable the Roll up actuals per team, if available attribute in the Cost Plan, actuals are grouped by team rather than by individual resource. This attribute helps to view and manage team-level costs.

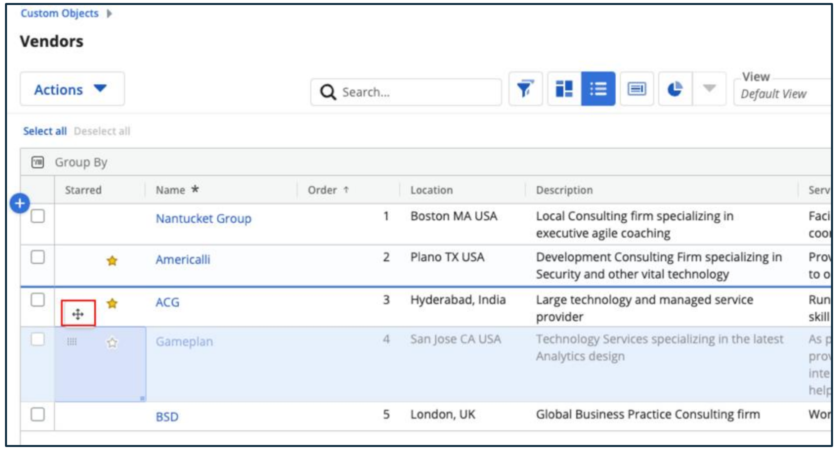
- Resources Without a Team: If a resource does not belong to a team but the Roll up actuals per team flag is checked, the resource will still display along with teams. For example, if Nicole Fleming is not part of the AI Team and the Rollup Actuals by Team if Available flag is checked, Clarity will display the AI Team along with Nicole's details in the Cost Plan.



Rank and Order Custom Master Objects and Sub-Objects

You can select the Drag-and-Drop Order Enabled attribute in Classic PPM for this object.

- Clarity will create a virtual Order attribute for the associated object, allowing end users to prioritize various features by simply dragging and dropping them into the Product Features grid.
- Select the Recalculate Order from Sort option to automatically sort the records based on the value in the Order column.

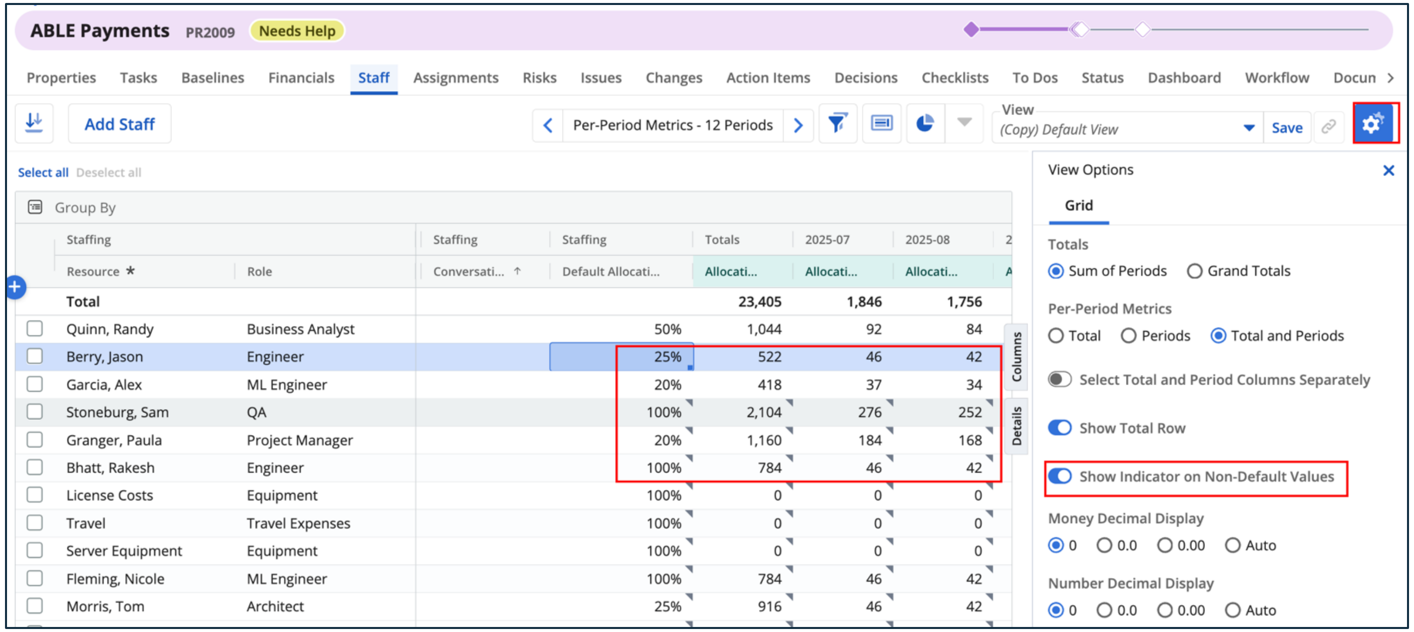


- You can secure the Order column to ensure only relevant users can leverage the drag-and-drop capability. If you don’t secure the Order column, Clarity does not enforce any additional security measures on the Order attribute.
- The Recalculate Order from Sort option will trigger the Recalculate Order from Sort job. This job calculates the new value of the Order attribute based on the current sort and applies it to all records.
- When you access the Custom Objects workspace, where the Recalculate Order from Sort job is currently calculating the new order, you will see a warning message asking you not to update the sort order.
- The Recalculate Order from Sort option is not supported for objects with more than 100,000 records.
- Drag-and-Drop Order Enabled is not supported for objects containing more than 100,000 records.

Enhancements to Visual Indicators

This release uses the Show Indicator on Non-Default Values option to display visual indicators when the default values of the following attributes are updated.

- Default allocation percentage.
- Grand Totals or Totals column.
- Allocation Start and Finish date columns.
- Individual allocation per-period metrics.



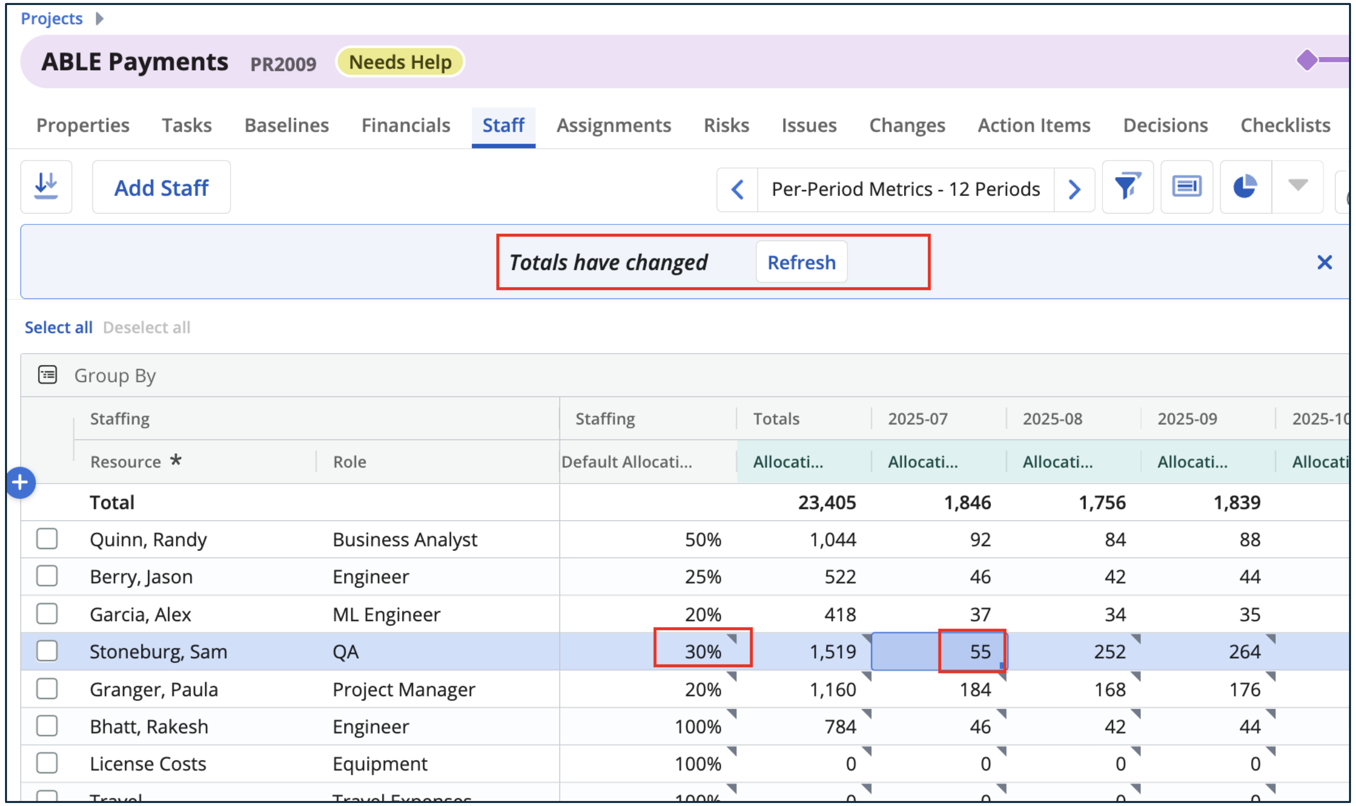
Reset Values in Total or Per-Period Cells

This release can clear the value in a Total or Per-Period cell to reset it.

This release can clear the value in a Total or Per-Period cell to reset it.

Clearing the cell by using ‘Delete key’ enables Clarity to recompute the amount using the current 'Default Allocation % associated with the resource.

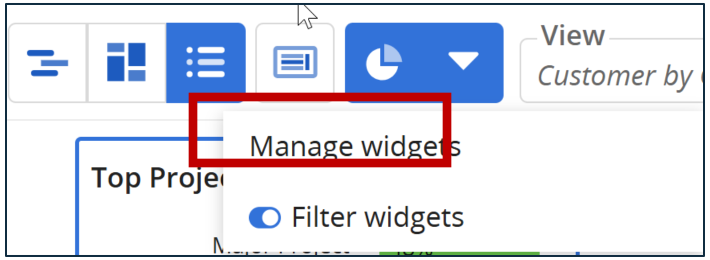
This is useful in scenarios where the visual indicator helps you realize that the Allocation field has been updated and no longer matches the default allocation. You can clear the value and move away if you want to reset the allocation to the default value automatically.



Advanced Filtering

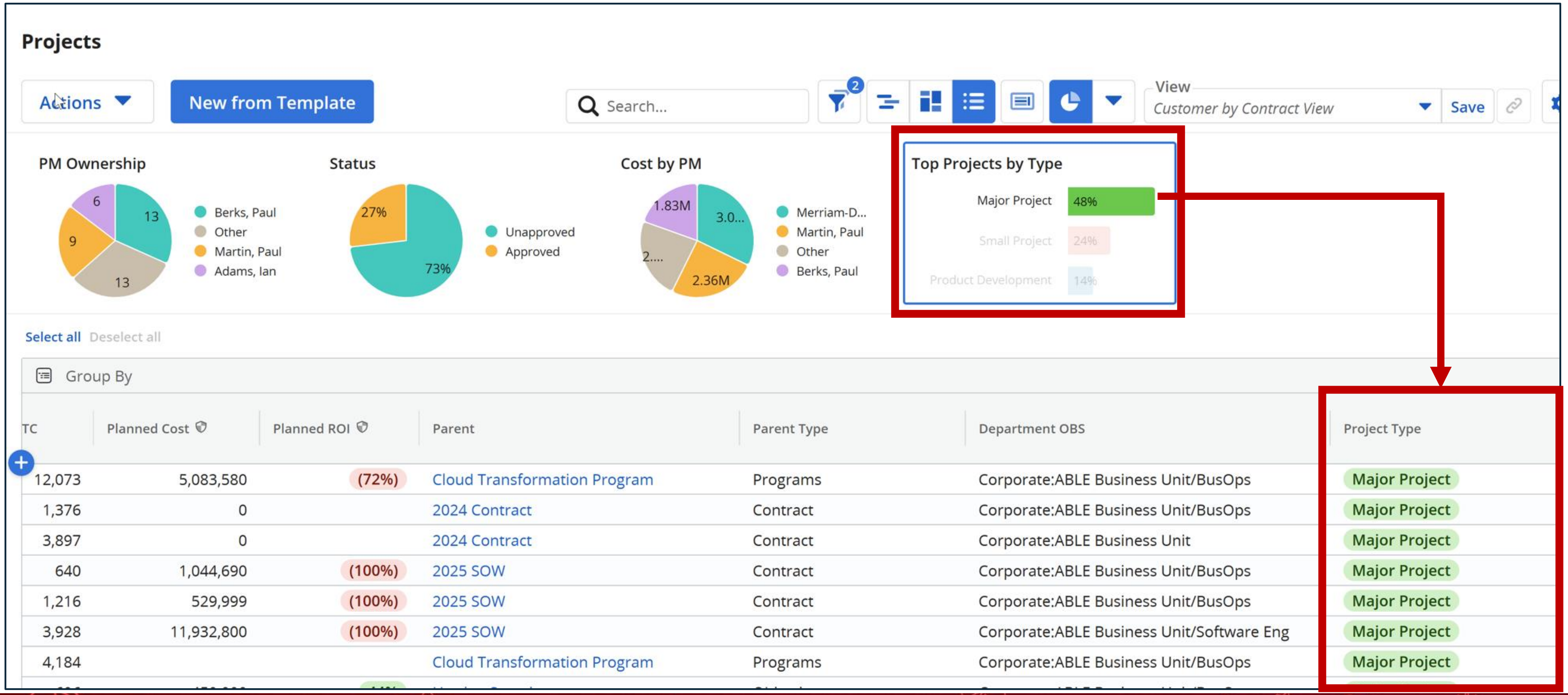
Dynamic Filtering Widgets

Selecting widget can now dynamically update the grid view to display data relevant to the selected widget. This feature applies to: Pie Charts, Bar Chart, Number Tiles, Progress Rings, and Targets.



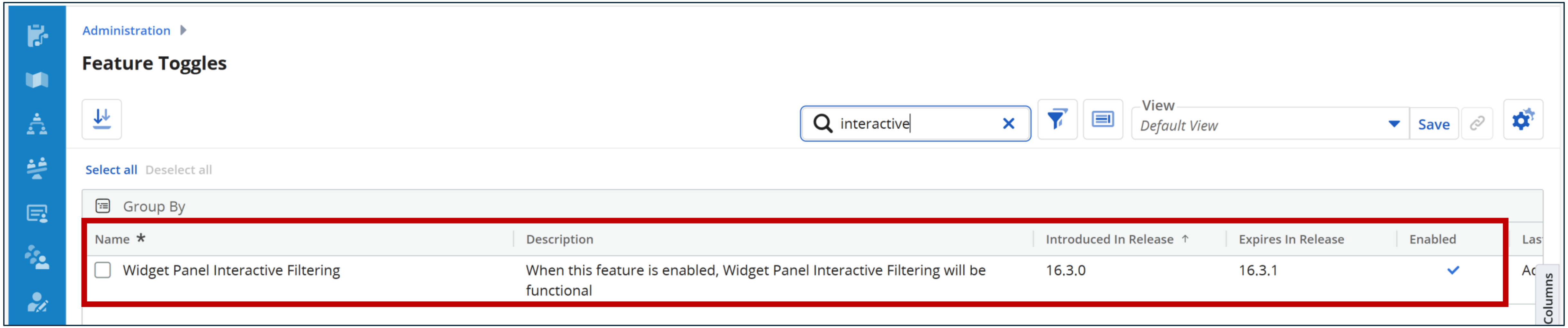
Use the Filter Widgets Toggle to enable or disable interactive filtering.
By default, this toggle is set to Off.

Select the visualization you wish to filter on and the grid will dynamically filter for the information



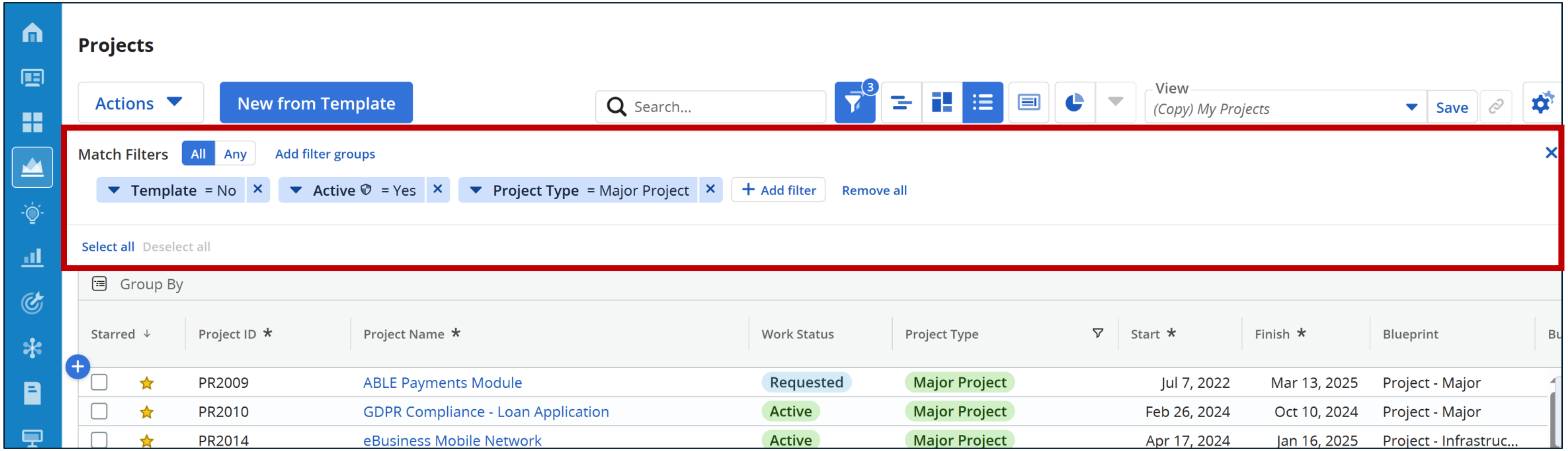
Dynamic Filtering Widgets (Continued)

Enabling Widget Panel Interactive Filtering in the Feature Toggles lets you leverage the Interactive Filtering on Widgets feature.



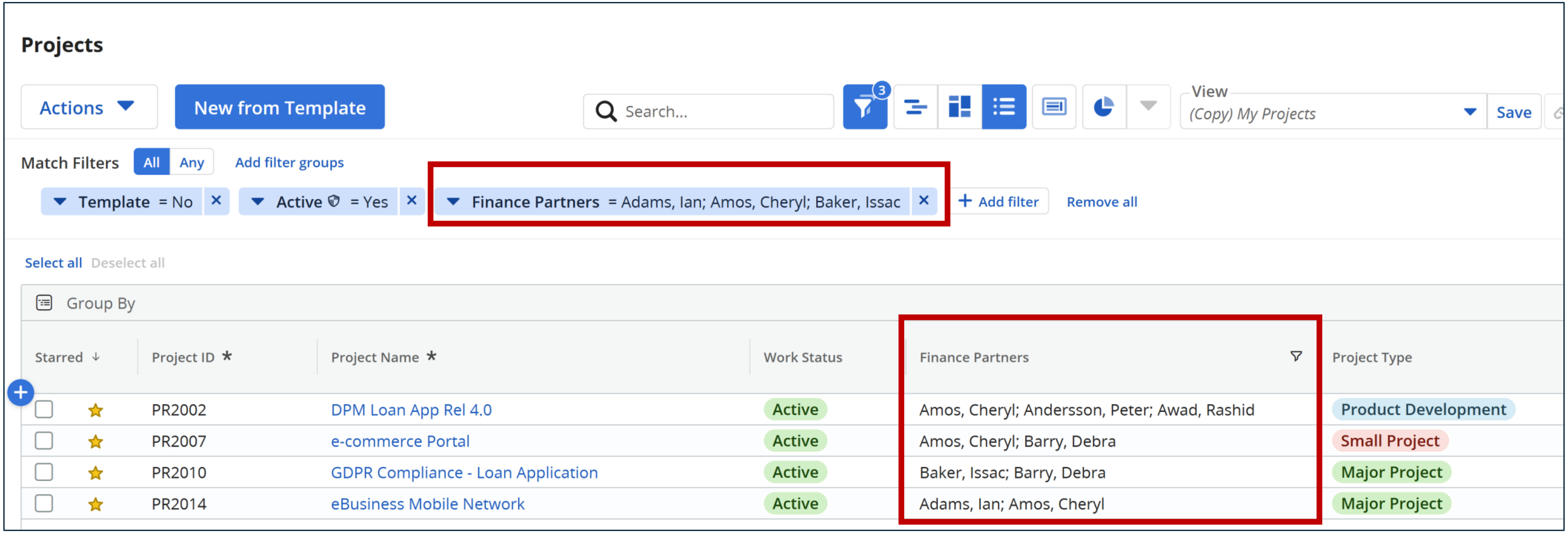
Persistent Filter State

Clarity now retains the user's filter's panel state (expanded or collapsed). If a user opens the filters panel in an expanded state and then navigates to a different page or logs out and back in, the filters panel will remain open.



Filter on Multiple Attributes

Users can now add the same attribute multiple times within a single filter group. This improvement simplifies searching for data by enabling multiple conditions on the same attribute without creating additional groups.

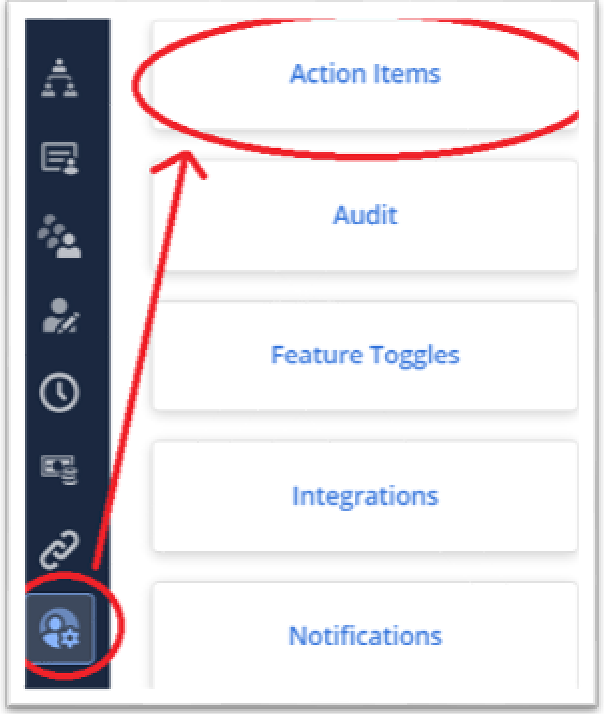


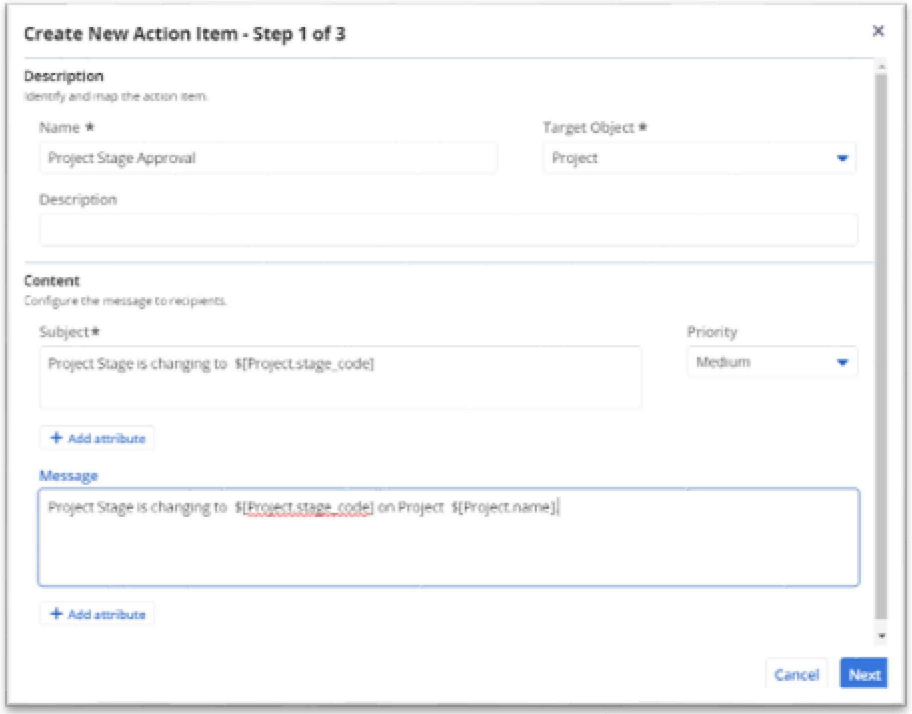
Action Items & Notifications

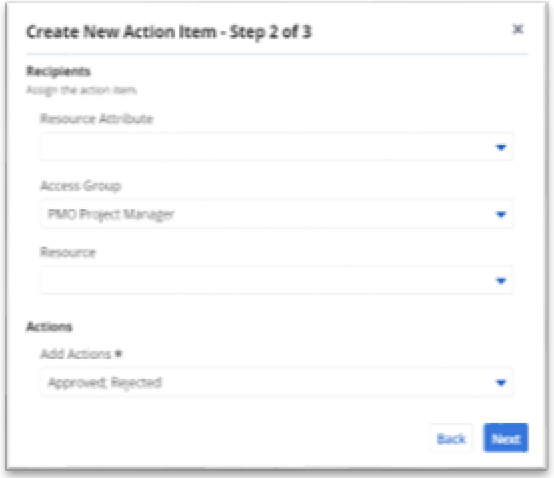
Action Items & Notifications (1)

Step 1: Define an Action Item

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



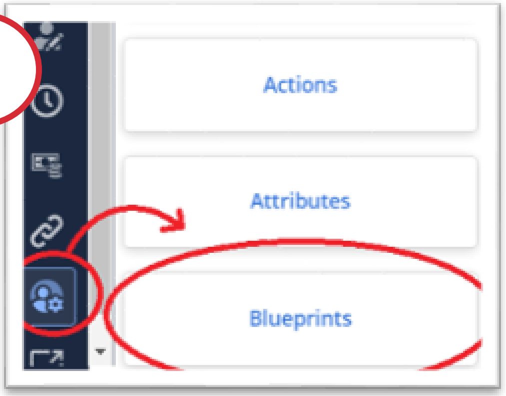




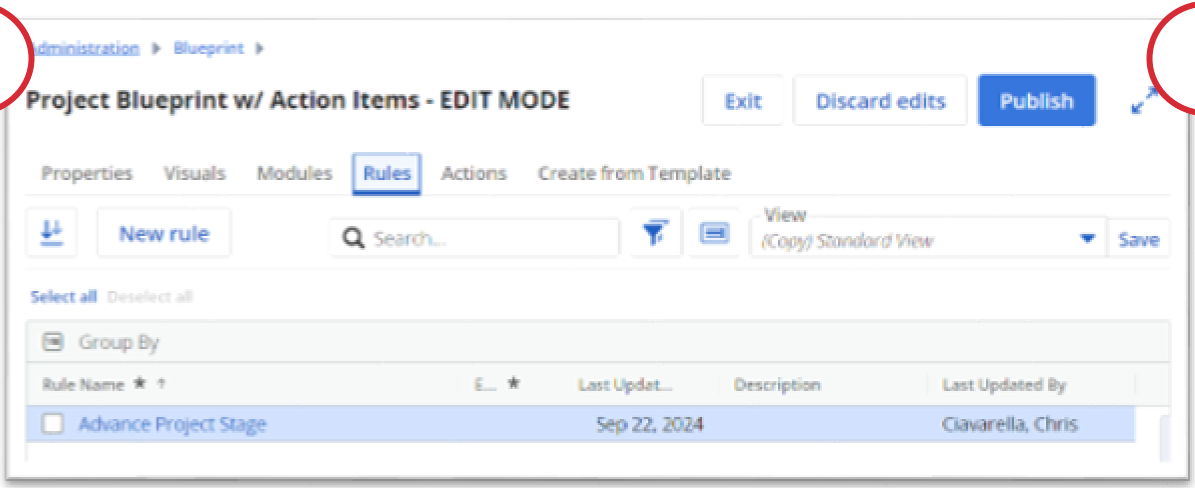
Action Items & Notifications (2)

Step 2: Define an Action Item Trigger

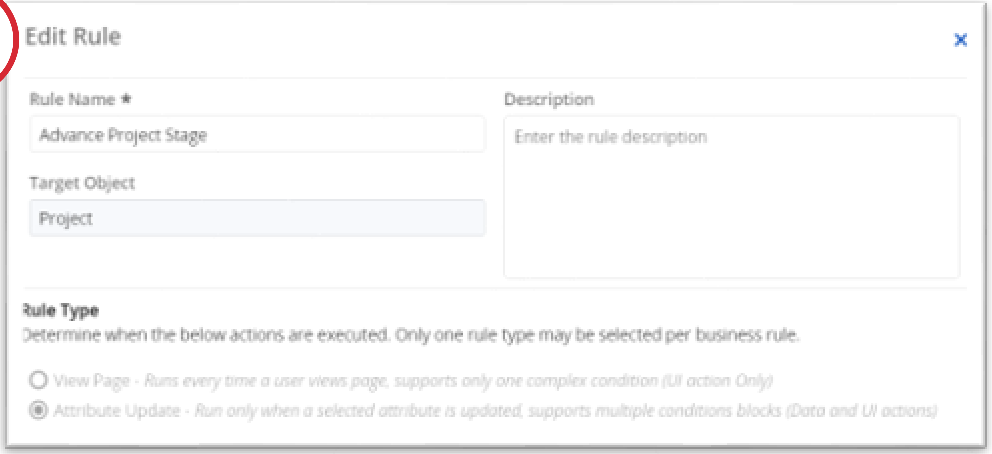
1



2



3



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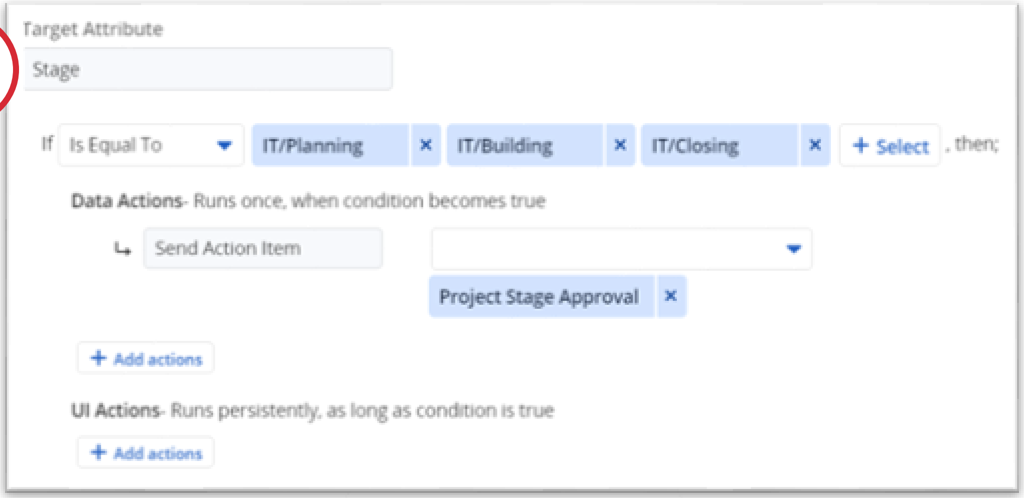
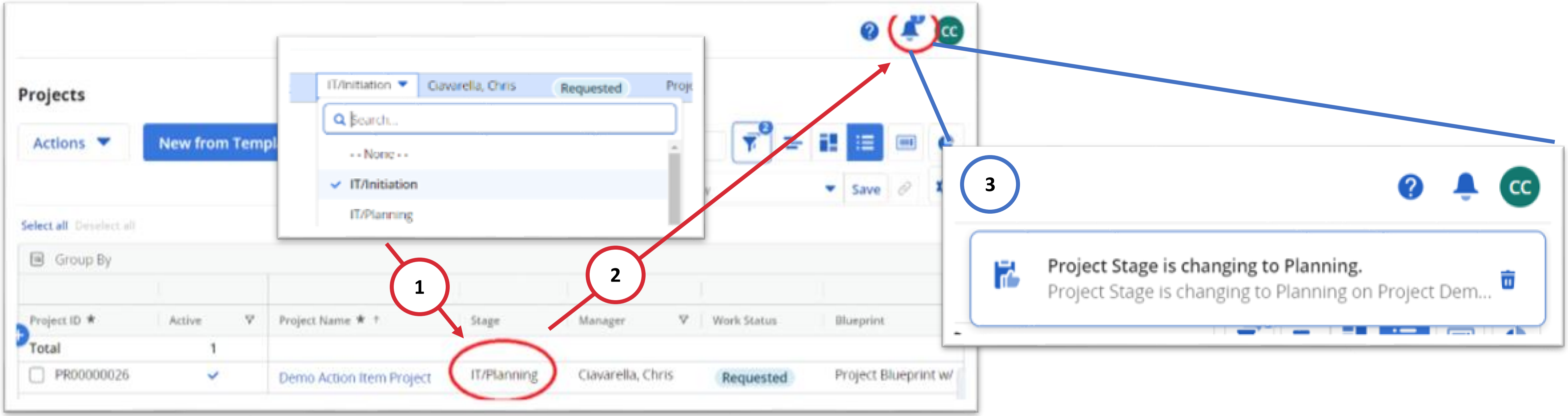


Action Items & Notifications (3)

Step 3: Trigger an Action Item

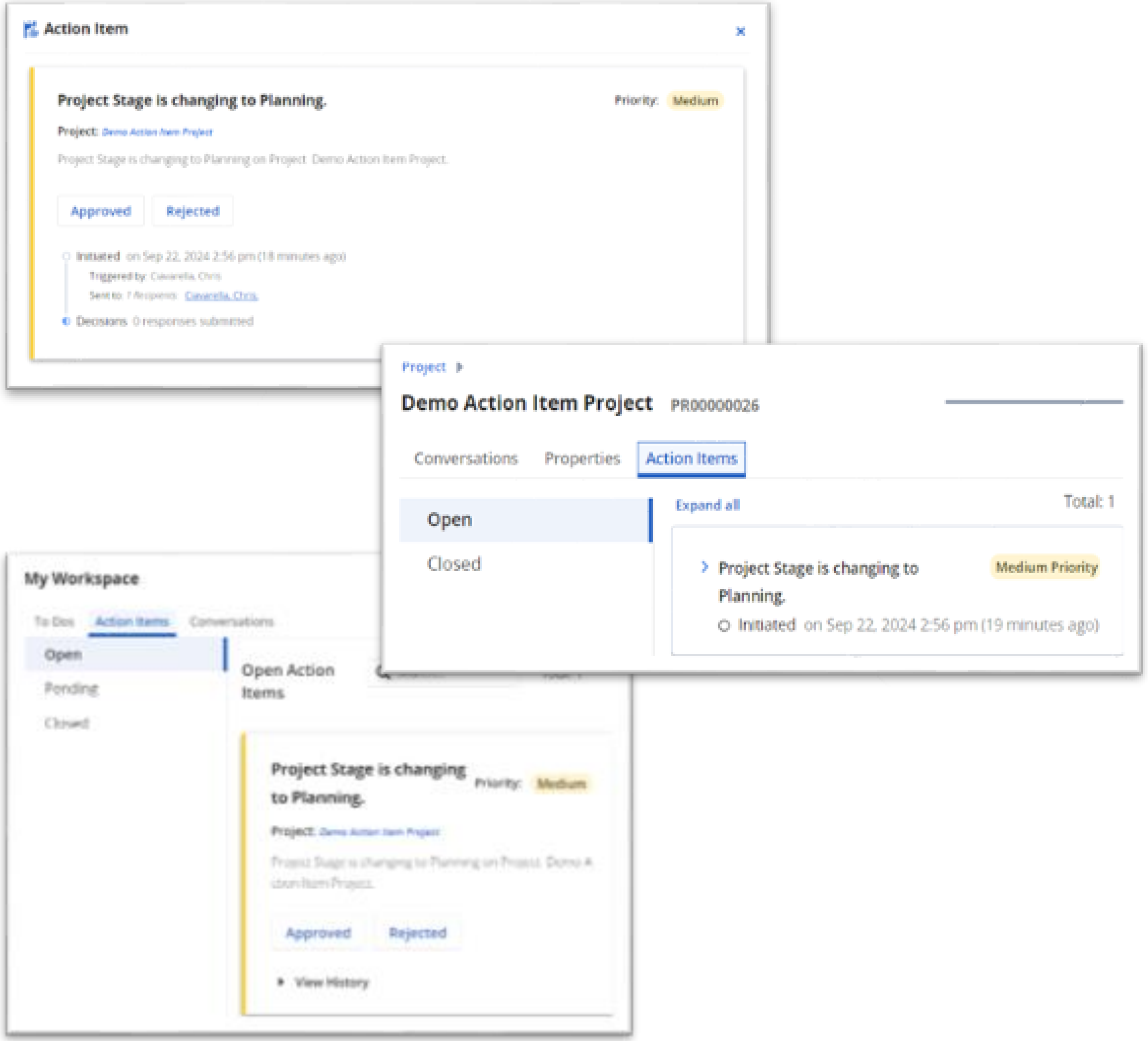


Action Items & Notifications (4)

Step 4: Respond to an Action Item

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

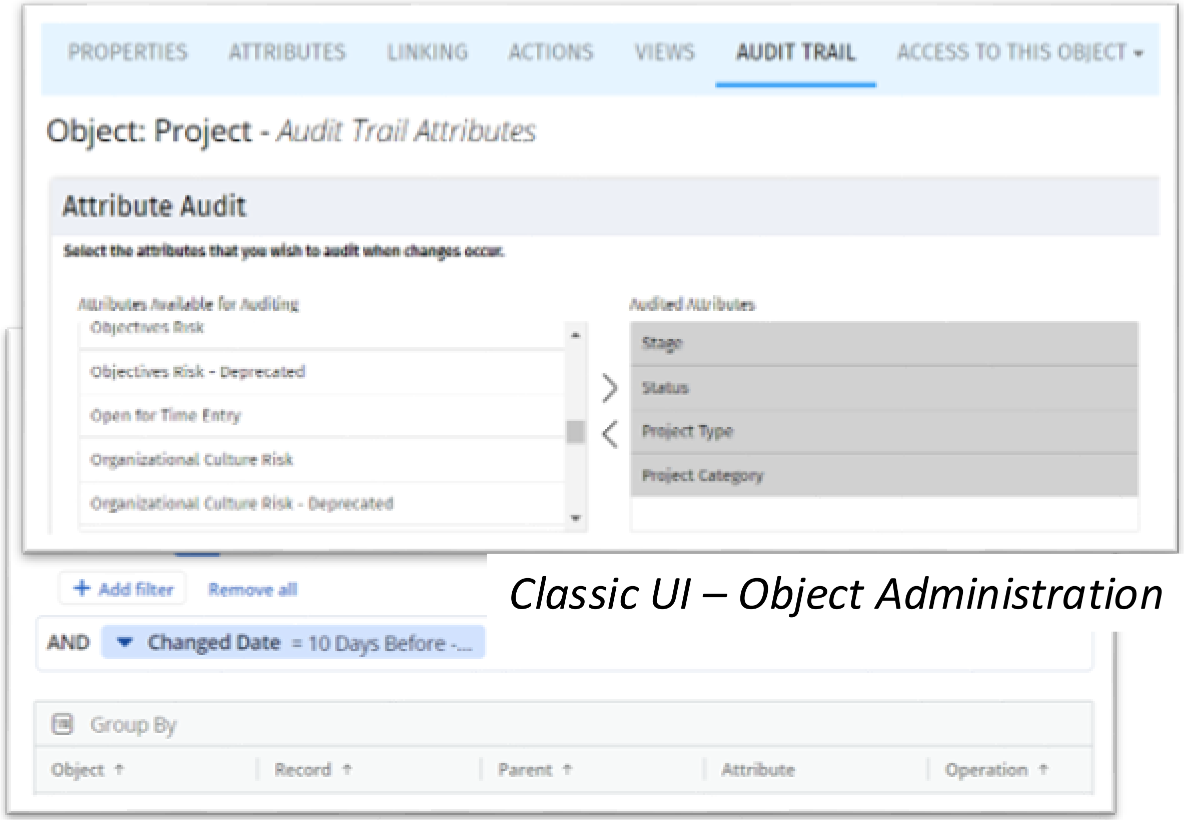
  1. Through the Notifications area in the page header.
  2. Through the Action Items module on a Blueprint.
  3. Through an Action Items table widget on a Page Canvas.
  4. Through the My Workspace area of the MUX.
  5. On the mobile app.
  6. Through E-mail (OOTB or Rego AIR).



Audit

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.



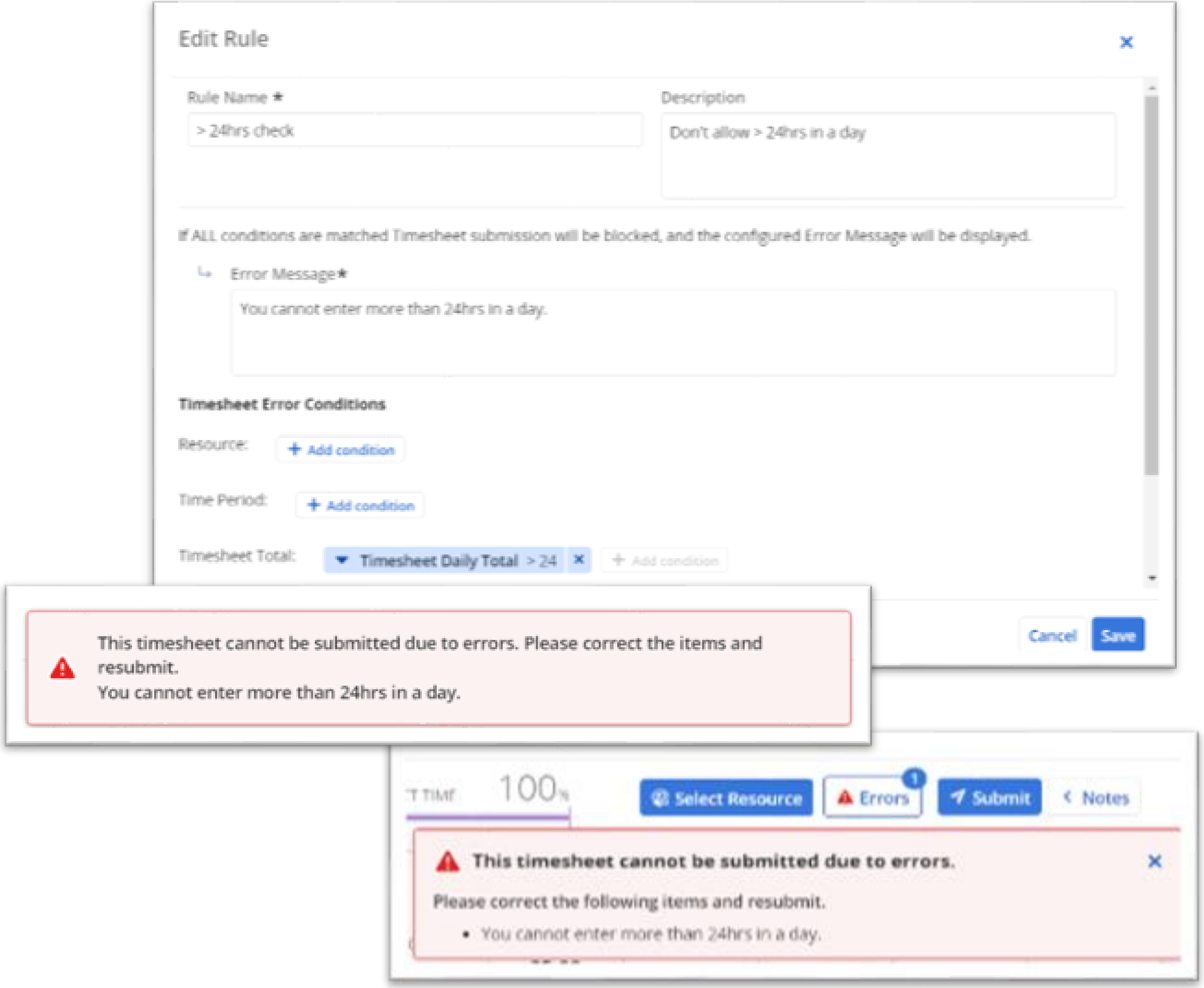
Classic UI – Object Administration

MUX - Global Audit View

Timesheet Rules

Timesheets Rules

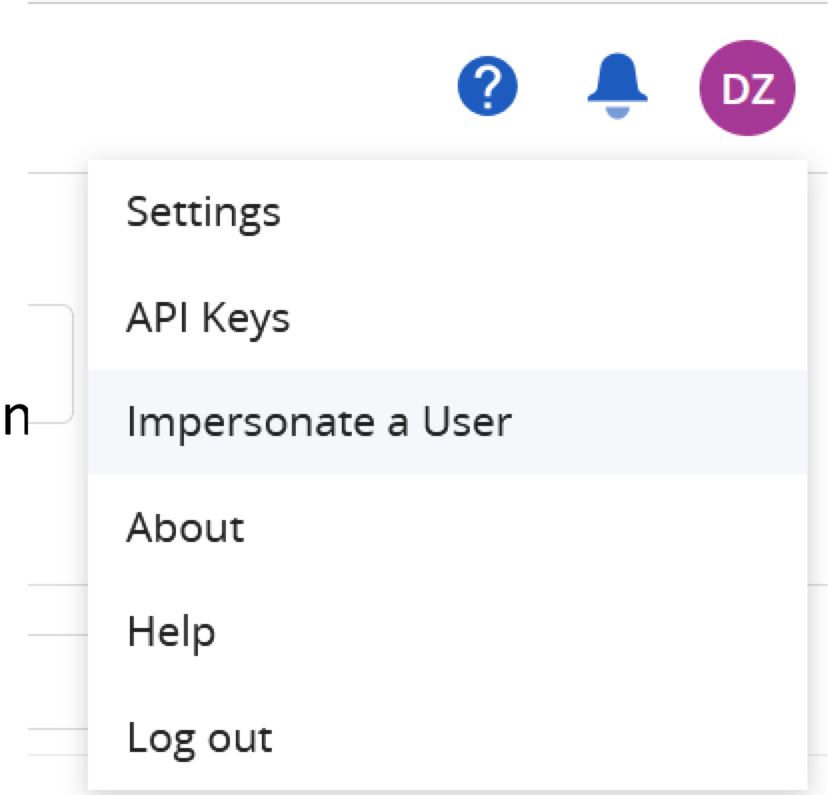
- Found in the Administration area.
- Allow validation checks against a predefined set of criteria.
- Prevents non-compliant timesheets from being submitted and necessitating a return.
- Customizable messages and calls to action which are displayed prior to a submission being accepted (when violated).

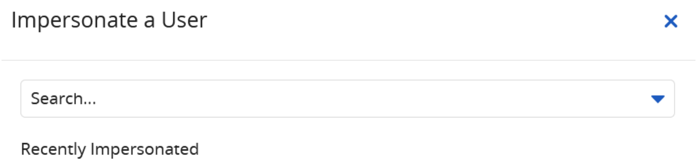


Impersonation

Impersonation

- Allows you to “login” as that user.
  - Modern UX -> Profile Icon -> Impersonate a User
- All configuration & views.
- Security.
  - Need access via the user Enable for Impersonation
  - Access Right:
    - Impersonate a user





Pages Workaround

Create attribute on Page Object

- First create a page id attribute on the Page (ui_page). The attribute needs to be a string with a maximum of 150 characters.

Setup Blueprints

- Create a blueprint on the page per type of dashboard. No Tabs or Tabs. Remove the properties module and add a channel.
  - No Tabs
  - Channel URL: ./ ../ ../ ../../niku/nu#action:${u_pageId}&puiFullscreen=on&puiHidePPMTabs=on
  - Tabs
  - Channel URL: ./ ../ ../ ../../niku/nu#action:${u_pageId}&puiFullscreen=on

Create Pages

- Navigate to the pages area in the Modern UX. Create a new instance in the page area. Add the new field “Page ID” into the columns.
  - Navigate to the classic dashboard and copy the value after action:
  - Example:
  - Paste the value into the column Page ID. Confirm a save has occurred.
  - Change the Blueprint of the page to either Tabs or No Tabs Dashboard as created in previous steps depending on the need.

Questions?

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Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

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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.

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3. Connect with each other and Clarity experts at RegoGroups.com.
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