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Modern UX Administration – Advanced

Your Guides:
Rahul Agrawal & David Zywiec

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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

Administration

Action Items	Actions	Attributes	Audit	Authentication & Keys
Blueprints	Feature Toggles	Integrations	Notifications	Plans
Staffing	System Settings	Timesheets	Users	Views

Group By							
	Last Name * 2↑	First Name * ↑	Status *	Timezone *	Locale *	Language *	User Groups
<input type="checkbox"/>	Admin	PMO	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	Ranganathan	Anand	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	Anon	Andres	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	Alcala	Anthony	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	Thota	Avinash	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	Rimmasch	Ben	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	Werner	Bob	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	Hazelzet	Brian	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	CAMC	TEST USER	Active	(GMT-05:00) Easter...	English(United Stat...	English	Basic group for us...
<input type="checkbox"/>	Montanez	Carlos	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	Ciavarella	Chris	Active	(GMT-05:00) Easter...	English(United Stat...	English	Admin All Access; B...
<input type="checkbox"/>	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

Fields



 Search...

Add section

Add subtab

<< Collapse

General

Admin Settings

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 top navigation bar includes links for STATUS, STATUS REPORT, SHAREPOINT, CLASSIC PPM, SMARTSHEET, POWERBI REPO..., and FIN. The main content area shows a Project Plan for the ACME Project, with a table listing tasks and their details. A modal window titled 'Configure - SmartSheet' is open, showing the configuration for a channel named 'SmartSheet'. The configuration includes a channel URL and a referrer URL.

Task Name	Duration	Start	Finish	% Complete	Staffing Size	Status	As
Initiation	14d	12/28/15	01/14/16	100%			
Detailed Requirer	6d	12/28/15	01/04/16	100%	4	Green	Mike
Hardware Requir	5d	01/05/16	01/11/16	100%	4	Blue	Ed
Final Resource P	2d	01/12/16	01/13/16	100%	4	Yellow	Ba
Staffing	1d	01/14/16	01/14/16	100%	4	Yellow	Ed

Configure - SmartSheet

CHANNEL NAME *
SmartSheet

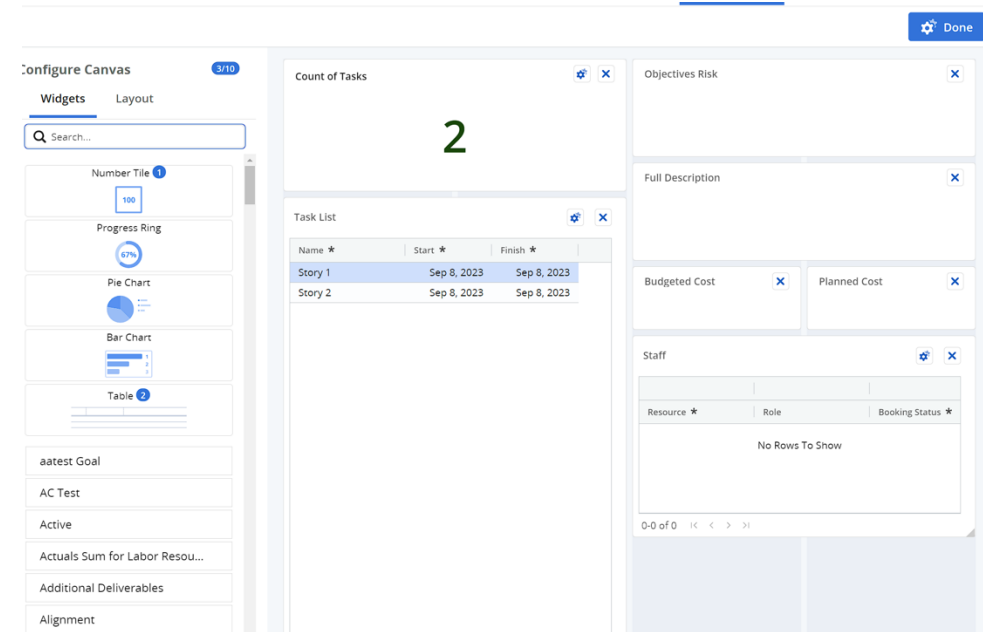
CHANNEL URL *
<https://app.smartsheet.com/b/publish?EQBCT=xxxxxxxxxxxx>

REFERRER URL
Comma Separated



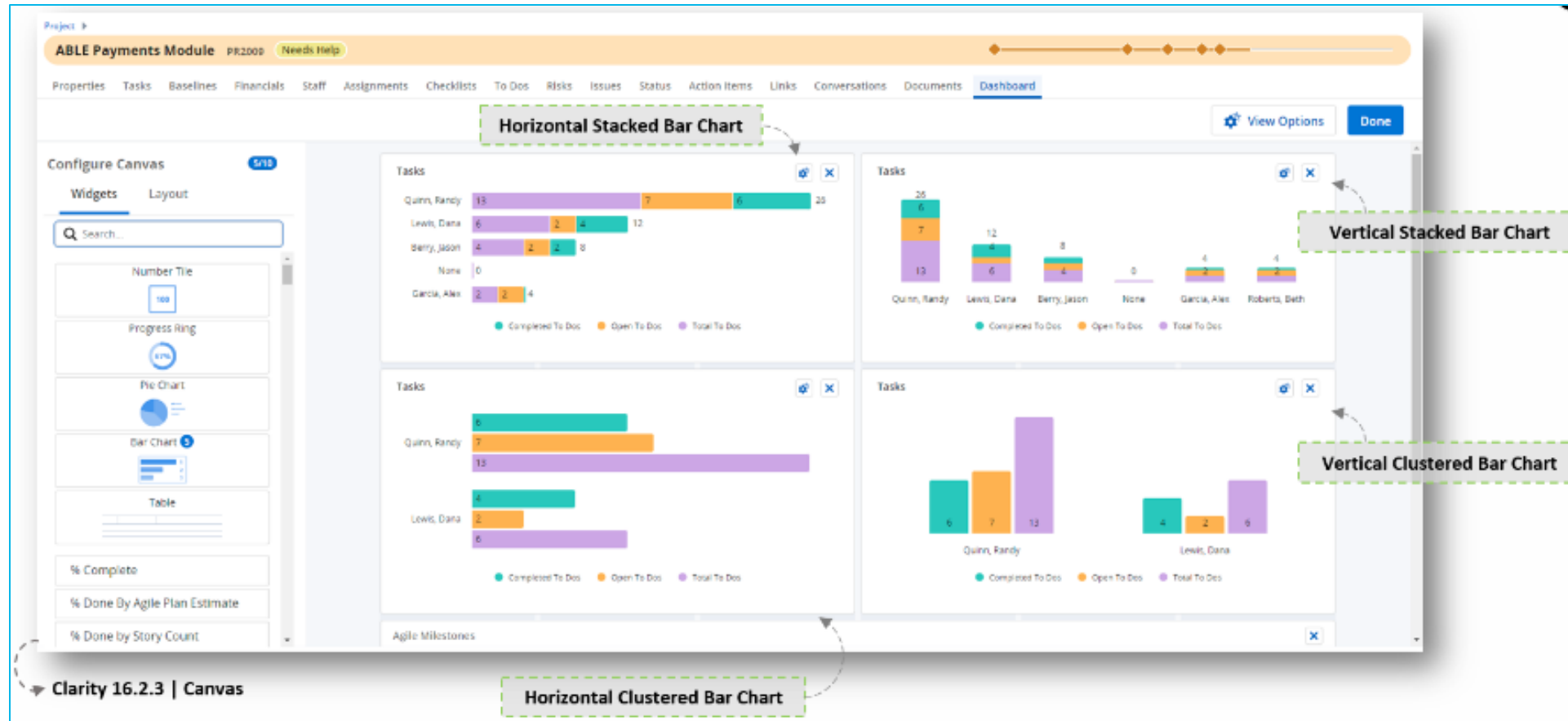
Canvas

- 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.'

The screenshot displays the Clarity 16.2.3 Canvas interface for a project titled "Digital Banking User Experience PR2024". The interface includes a top navigation bar with tabs like Properties, Tasks, Baselines, Financials, Staff, Assignments, Checklists, To Dos, Risks, Issues, Status, Action Items, Links, Conversations, Documents, and Dashboard. A "Configure Canvas" sidebar on the left shows various widget options: Number Tile, Progress Ring, Pie Chart, Bar Chart (selected), and Table. The main canvas area displays four bar charts for "Staff" metrics across quarters 2024-Q2, 2024-Q3, and 2024-Q4. The charts are categorized by "Allocation" (green), "ETC" (orange), and "Remaining Allocation" (purple). Annotations highlight different chart types: "Horizontal Clustered Bar Chart", "Horizontal Stacked Bar Chart", "Vertical Cluster", and "Vertical Stacked".

On the right, the "Create Bar Chart" configuration panel is shown. It includes fields for Title (Staff), Type (Sum), and Group By (Periods). A search bar is present for selecting specific periods. A callout box states: "A new option 'Periods' is available in the Group By type". The "Periods" option is highlighted in the Group By dropdown menu.

Clarity 16.2.3 | Canvas

Clarity 16.2.3 | Create Bar Chart

Introducing Conditional Formatting for Canvas

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

The **Conditional Formatting** option is available for **Canvas Tables** in Configure mode

The screenshot displays the 'Configure Canvas' interface for the 'ABLE Payments Module' project. A table titled 'Tasks' is shown with columns: Name, Start, Finish, Status, and Total Effort. The table contains six rows of task data. A 'Conditional Formatting' dialog box is open, showing three rules based on the 'Status' column:

- Rule 1:** If Status = Started then, Format: AaBbCcYyZz, To: Entire Row, Actions: [Icons]
- Rule 2:** If Status = Completed then, Format: [Empty], To: Entire Row, Actions: [Icons]
- Rule 3:** If Status = Not Started then, Format: AaBbCcYyZz, To: Entire Row, Actions: [Icons]

The table data is as follows:

Name	Start	Finish	Status	Total Effort
Initiation Phase	Mar 29, 2024	Mar 29, 2024	Not Started	
Initiating Process Complete	Mar 29, 2024	Mar 29, 2024	Completed	
Planning Phase	May 3, 2024	May 27, 2024	Not Started	
Define Scope Change and Control Process	May 3, 2024	May 14, 2024	Started	
Requirements Definition	May 9, 2024	May 18, 2024	Started	
Construction Phase	May 10, 2024	Aug 6, 2024	Not Started	

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

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.

Clarity

System Options

New User Experience

ACTIVATE NEW USER EXPERIENCE

☒

ACTIVATE TIMESHEETS

☒

DIRECT PROCESS ACTION ITEM NOTIFICATION LINKS TO NEW USER EXPERIENCE

☒

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

ACTIVATE VAIA AI SERVICE

☒

(By activating, you are agreeing to share some of your Clarity data with a third party generative AI service (the "Service"). The Service uses emerging technology and may generate inaccurate output and unexpected results. Use of the Service requires an account with the Service provider and is subject to the terms of your agreement with the Service provider. Broadcom bears no responsibility or liability for the Service, including its use of shared Customer data or Personal Data. You agree not to use the generative AI Technology in this product to generate content that is illegal, harmful, misleading, or violates third-party rights or privacy.)

PRIORITIZE ACCESS RIGHTS OVER ATTRIBUTE LEVEL SECURITY

☐

SET REPORT DATE TO CURRENT DATE ON PREVIEW

☒

ALWAYS DISPLAY THE ADD ICON IN STATUS AND STATUSREPORT GRIDS

☒

DISABLE CHILD ROW CREATION FOR COST PLAN DETAILS





☐

DELETE UNSAVED VIEWS ON LOGOUT

☐

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)

Idea Type *

Release

Idea Category

Distributed



Idea Type *

Major Project

Idea Category

Idea Type *

Product Development

Idea Category

New Product or Service



Idea Type *

Major Project

Idea Category

New Product or Service

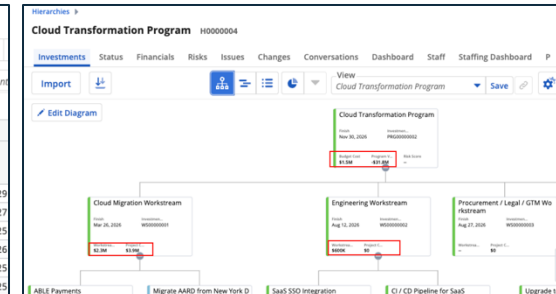
Include Actuals from Children in Cost Plans and Budgets

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:** ('Σ') 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

Star	Project Name	Parent	Start	Finish
★	ABLE Payments	Cloud Transformation Pr...	Jan 17, 2024	Sep 20, 2029
★	Analytics and ERP Implementation	Cloud Transformation Pr...	Feb 1, 2024	May 14, 2027
★	Application for Tracking Implementatio...	Cloud Transformation Pr...	Jan 21, 2025	Jun 20, 2025
★	Digital Banking User Experience	Cloud Transformation Pr...	Feb 16, 2024	Jan 1, 2026
★	DPM Loan App Rel 4.0	Cloud Transformation Pr...	Feb 9, 2024	Dec 29, 2025
★	eCommerce Portal	Global Compliance Progr...	Dec 20, 2023	Oct 27, 2025



Plan Comparison	Plan Revisions	PDR Amount
Financial Plan 01	Monthly	2023-12
Financial Plan 02	Monthly	2024-01
Financial Plan 03	Monthly	2024-01
Financial Plan 04	Monthly	2024-01
Financial Plan 05	Monthly	2024-01
Financial Plan 06	Monthly	2024-01

Transaction Date	Transaction Type	Amount	Description
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...
Apr 2, 2023	ABLE Payments M...	1,000.00	ABLE Payments M...

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.

The screenshot illustrates the Clarity software interface for the 'ABLE Payments Module' project. The 'Financials' tab is active, showing a 'Cost Plan' for 'Financial Plan V5'. The 'Group By' dropdown is set to 'Resource', and the 'Actuals' column is highlighted. A callout box points to the 'Fleming, Nicole' resource, which is listed under the 'AI Team' group. A 'Transaction Review' window is also open, showing a list of transactions for the 'ABLE Payments Module'.

Trans...	Resource	Task	Investment Name	Role	Units	Team	Actual Cost
May 6, 2025	Fleming, Nicole	Unit and Perform...	ABLE Payments M...	ML Engineer	8		1,320
May 5, 2025	Fleming, Nicole	Unit and Perform...	ABLE Payments M...	ML Engineer	8		1,320
May 2, 2025	Morris, Tom	Database Develop...	ABLE Payments M...	AI Team	9	AI Team	1,350
May 2, 2025	Fleming, Nicole	Unit and Perform...	ABLE Payments M...	ML Engineer	8		1,320
May 1, 2025	Patel, Sid	Complete Project P...	ABLE Payments M...		12	AI Team	1,800
May 1, 2025	Morris, Tom	Database Develop...	ABLE Payments M...	AI Team	8	AI Team	1,200
May 1, 2025	Fleming, Nicole	Unit and Perform...	ABLE Payments M...	ML Engineer	8		1,320

If a resource does not belong to a team but the **Rollup Actuals by Team if Available** attribute is checked, the resource will still appear along with teams.

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.

Starred	Name *	Order ↑	Location	Description	Serv
<input type="checkbox"/>	Nantucket Group	1	Boston MA USA	Local Consulting firm specializing in executive agile coaching	Facil
<input type="checkbox"/>	Americalli	2	Plano TX USA	Development Consulting Firm specializing in Security and other vital technology	Provi
<input type="checkbox"/>	ACG	3	Hyderabad, India	Large technology and managed service provider	Run
<input type="checkbox"/>	Gameplan	4	San Jose CA USA	Technology Services specializing in the latest Analytics design	As p
<input type="checkbox"/>	BSD	5	London, UK	Global Business Practice Consulting firm	Wor

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.

The screenshot shows the 'ABLE Payments PR2009' interface with the 'Staff' tab selected. The table displays resource allocation data for various roles. A red box highlights the 'Default Allocation' column and the 'Show Indicator on Non-Default Values' option in the View Options panel.

Staffing	Staffing	Staffing	Totals	2025-07	2025-08	2025-09
Resource *	Role	Conversati...	Default Allocati...	Allocati...	Allocati...	Allocati...
Total			23,405	1,846	1,756	
<input type="checkbox"/> Quinn, Randy	Business Analyst		50%	1,044	92	84
<input type="checkbox"/> Berry, Jason	Engineer		25%	522	46	42
<input type="checkbox"/> Garcia, Alex	ML Engineer		20%	418	37	34
<input type="checkbox"/> Stoneburg, Sam	QA		100%	2,104	276	252
<input type="checkbox"/> Granger, Paula	Project Manager		20%	1,160	184	168
<input type="checkbox"/> Bhatt, Rakesh	Engineer		100%	784	46	42
<input type="checkbox"/> License Costs	Equipment		100%	0	0	0
<input type="checkbox"/> Travel	Travel Expenses		100%	0	0	0
<input type="checkbox"/> Server Equipment	Equipment		100%	0	0	0
<input type="checkbox"/> Fleming, Nicole	ML Engineer		100%	784	46	42
<input type="checkbox"/> Morris, Tom	Architect		25%	916	46	42

The View Options panel on the right shows the 'Grid' tab selected. The 'Totals' section has 'Sum of Periods' selected. The 'Per-Period Metrics' section has 'Total and Periods' selected. The 'Show Indicator on Non-Default Values' option is checked and highlighted with a red box.

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.

Projects ▾

ABLE Payments PR2009 Needs Help

Properties Tasks Baselines Financials **Staff** Assignments Risks Issues Changes Action Items Decisions Checklists

[Add Staff](#) Per-Period Metrics - 12 Periods

Totals have changed [Refresh](#)

Select all Deselect all

Group By

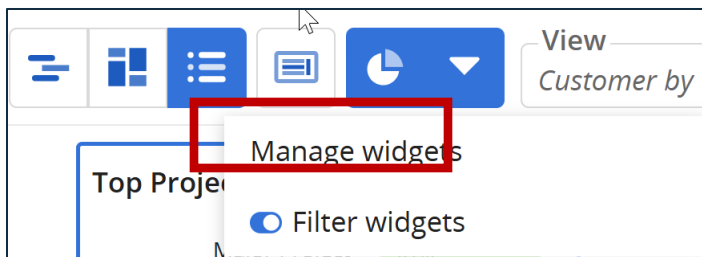
Staffing	Staffing	Totals	2025-07	2025-08	2025-09	2025-10
Resource *	Role	Default Allocati...	Allocati...	Allocati...	Allocati...	Allocati...
Total			23,405	1,846	1,756	1,839
<input type="checkbox"/> Quinn, Randy	Business Analyst	50%	1,044	92	84	88
<input type="checkbox"/> Berry, Jason	Engineer	25%	522	46	42	44
<input type="checkbox"/> Garcia, Alex	ML Engineer	20%	418	37	34	35
<input type="checkbox"/> Stoneburg, Sam	QA	30%	1,519	55	252	264
<input type="checkbox"/> Granger, Paula	Project Manager	20%	1,160	184	168	176
<input type="checkbox"/> Bhatt, Rakesh	Engineer	100%	784	46	42	44
<input type="checkbox"/> License Costs	Equipment	100%	0	0	0	0
<input type="checkbox"/> Travel	Travel Expenses	100%	0	0	0	0

Advanced Filtering



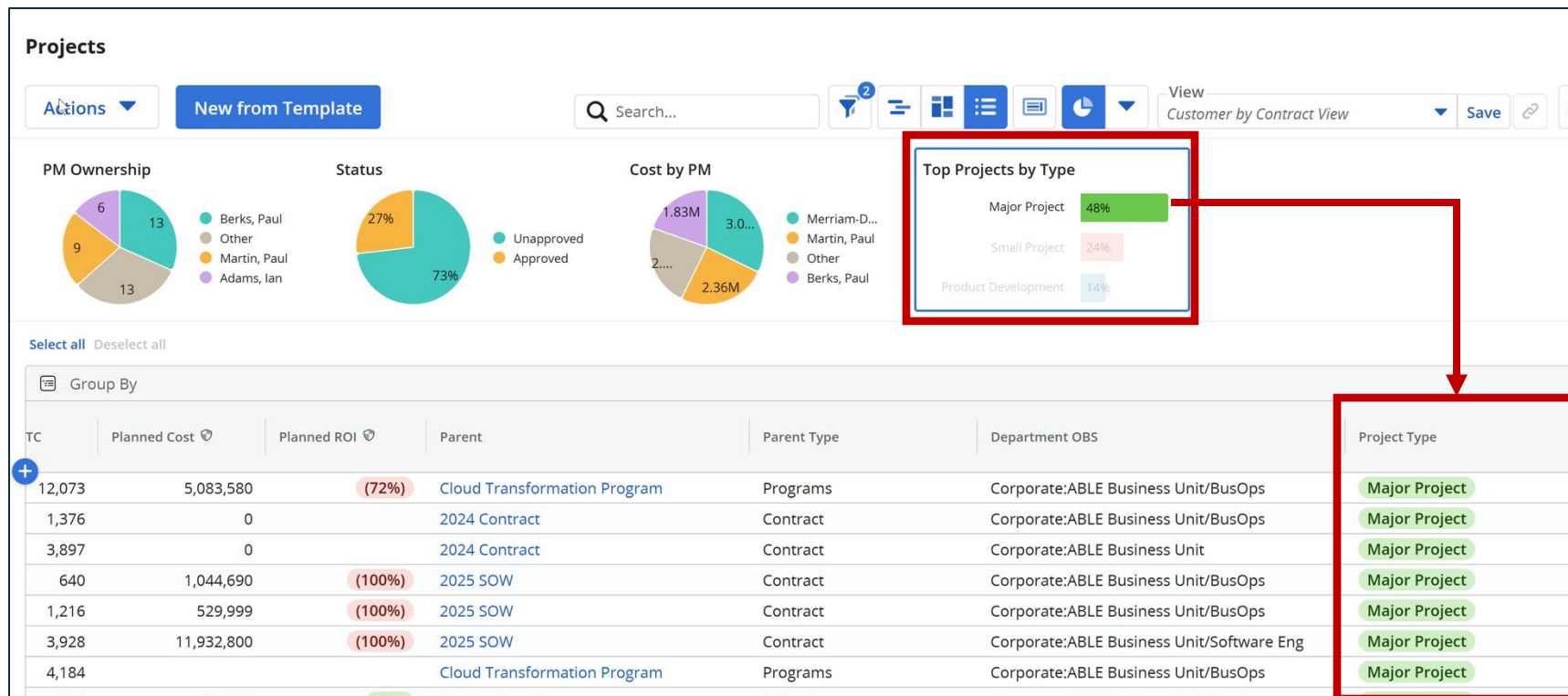
Dynamic Filtering Widgets

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.

The screenshot shows the 'Feature Toggles' page in an application. The left sidebar contains navigation icons. The main header area includes 'Administration' and 'Feature Toggles'. Below this is a search bar with the text 'interactive' and a 'View' dropdown set to 'Default View'. A table lists the feature toggles. The first toggle, 'Widget Panel Interactive Filtering', is highlighted with a red border. It is currently disabled, as indicated by an unchecked checkbox and a blue checkmark in the 'Enabled' column.

Name *	Description	Introduced In Release ↑	Expires In Release	Enabled
<input type="checkbox"/> Widget Panel Interactive Filtering	When this feature is enabled, Widget Panel Interactive Filtering will be functional	16.3.0	16.3.1	✓

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.

The screenshot shows the Clarity 'Projects' page. A red rectangle highlights the 'Match Filters' panel, which is expanded. The panel includes a search bar, a 'View' dropdown set to '(Copy) My Projects', and a list of active filters: 'Template = No', 'Active = Yes', and 'Project Type = Major Project'. Below the filters, there are 'Select all' and 'Deselect all' links. The main table below the filters shows a list of projects with columns for 'Starred', 'Project ID', 'Project Name', 'Work Status', 'Project Type', 'Start', 'Finish', and 'Blueprint'. The first three projects are visible: PR2009 (ABLE Payments Module, Requested, Major Project), PR2010 (GDPR Compliance - Loan Application, Active, Major Project), and PR2014 (eBusiness Mobile Network, Active, Major Project).

Starred ↓	Project ID *	Project Name *	Work Status	Project Type	Start *	Finish *	Blueprint
<input type="checkbox"/>	PR2009	ABLE Payments Module	Requested	Major Project	Jul 7, 2022	Mar 13, 2025	Project - Major
<input type="checkbox"/>	PR2010	GDPR Compliance - Loan Application	Active	Major Project	Feb 26, 2024	Oct 10, 2024	Project - Major
<input type="checkbox"/>	PR2014	eBusiness Mobile Network	Active	Major Project	Apr 17, 2024	Jan 16, 2025	Project - Infrastruc...

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.

Projects

Actions ▾ New from Template

Search...

View (Copy) My Projects ▾ Save

Match Filters All Any Add filter groups

Template = No × Active = Yes × Finance Partners = Adams, Ian; Amos, Cheryl; Baker, Issac × + Add filter Remove all

Select all Deselect all

Group By

Starred ↓	Project ID *	Project Name *	Work Status	Finance Partners ▾	Project Type
<input type="checkbox"/>	★ PR2002	DPM Loan App Rel 4.0	Active	Amos, Cheryl; Andersson, Peter; Awad, Rashid	Product Development
<input type="checkbox"/>	★ PR2007	e-commerce Portal	Active	Amos, Cheryl; Barry, Debra	Small Project
<input type="checkbox"/>	★ PR2010	GDPR Compliance - Loan Application	Active	Baker, Issac; Barry, Debra	Major Project
<input type="checkbox"/>	★ PR2014	eBusiness Mobile Network	Active	Adams, Ian; Amos, Cheryl	Major Project

Action Items & Notifications

Action Items & Notifications (1)

Step 1: Define an Action Item

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

The image displays the Rego UI interface for defining an action item. On the left, a sidebar menu shows 'Action Items' highlighted with a red circle and arrow. The main content area shows the 'Create New Action Item - Step 1 of 3' dialog. This dialog has three sections: 'Description' (Name, Target Object, Description), 'Content' (Subject, Priority, Add attribute), and 'Message' (Message text, Add attribute). The 'Create New Action Item - Step 2 of 3' dialog is also shown, with sections for 'Recipients' (Resource Attribute, Access Group, Resource) and 'Actions' (Add Actions, Approved/Rejected). The 'Create New Action Item - Step 3 of 3' dialog is shown, with sections for 'Decisions & Actions' (If/Then conditions, Close Action items, Set Attribute, Work Status, Complete/On Hold).

Action Items & Notifications (2)

Step 2: Define an Action Item Trigger

1

2

Rule Name	Last Updated	Description	Last Updated By
Advance Project Stage	Sep 22, 2024		Clavarella, Chris

3

Edit Rule

Rule Name: Advance Project Stage

Description: Enter the rule description

Target Object: Project

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)

4

Target Attribute

Stage

If Is Equal To IT/Planning IT/Building IT/Closing + Select, then;

Data Actions- Runs once, when condition becomes true

Send Action Item Project Stage Approval

+ Add actions

UI Actions- Runs persistently, as long as condition is true

+ Add actions

Action Items & Notifications (3)

Step 3: Trigger an Action Item

The screenshot shows the 'Projects' interface with a table of projects. A red circle labeled '1' highlights the 'IT/Planning' stage in the table. A red circle labeled '2' highlights the 'IT/Planning' stage in the dropdown menu. A red arrow points from the 'IT/Planning' stage in the table to the notification bell icon. A blue arrow points from the notification bell icon to a notification card.

Projects

Actions ▾ New from Template

Select all Deselect all

Group By

Project ID ★	Active ▾	Project Name ★ ↑	Stage	Manager ▾	Work Status	Blueprint
Total	1					
<input type="checkbox"/> PR00000026	<input checked="" type="checkbox"/>	Demo Action Item Project	IT/Planning	Clavarella, Chris	Requested	Project Blueprint w/

IT/Initiation Clavarella, Chris Requested

Search...

-- None --

✓ IT/Initiation

IT/Planning

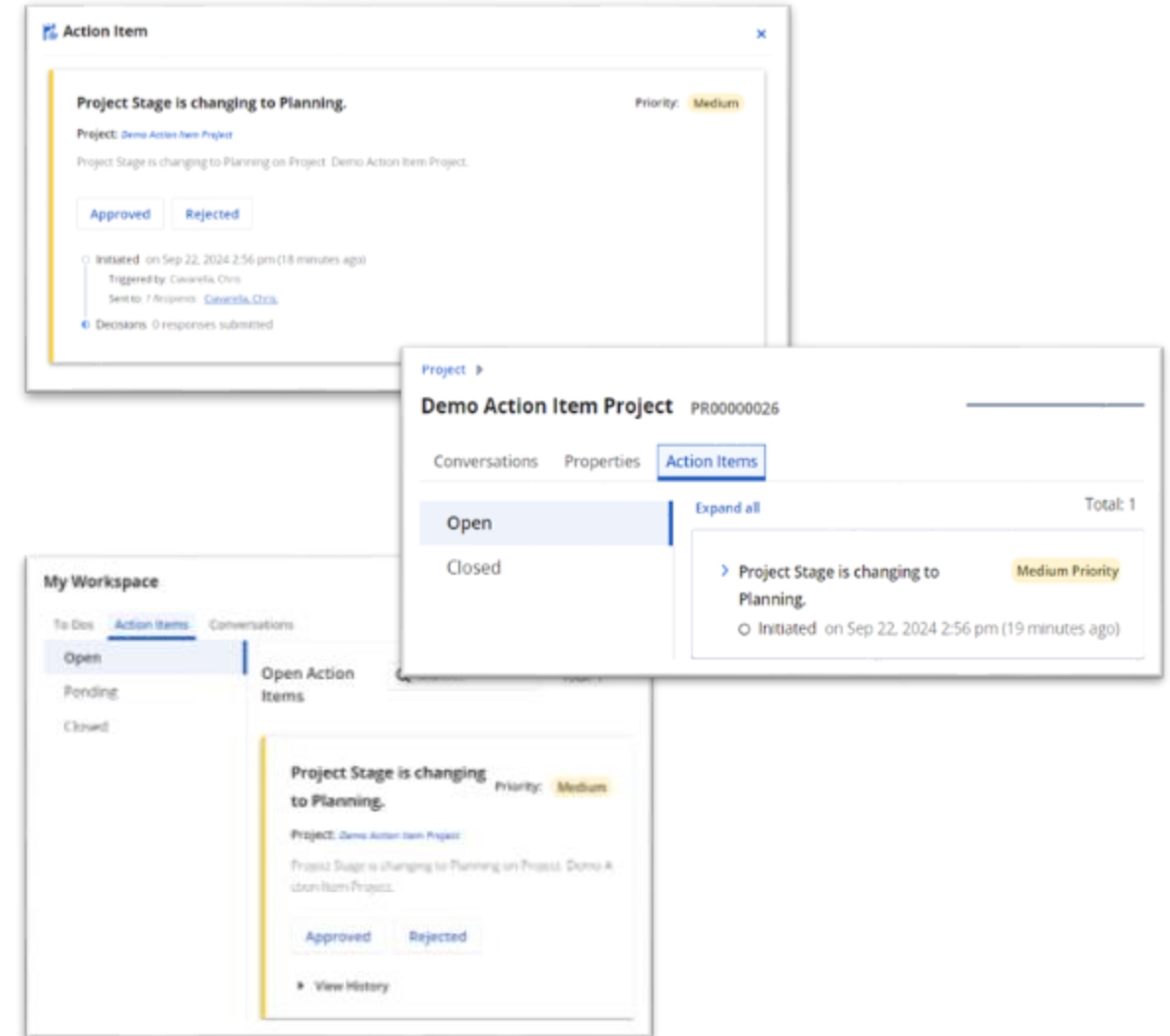
3

Project Stage is changing to Planning.
Project Stage is changing to Planning on Project Dem...

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.





The screenshot shows the 'AUDIT TRAIL' tab in the 'Object: Project - Audit Trail Attributes' section. It features a table for 'Attribute Audit' with columns for 'Attributes Available for Auditing' and 'Audited Attributes'. The 'Attributes Available for Auditing' list includes 'Objectives Risk', 'Objectives Risk - Deprecated', 'Open for Time Entry', 'Organizational Culture Risk', and 'Organizational Culture Risk - Deprecated'. The 'Audited Attributes' list includes 'Stage', 'Status', 'Project Type', and 'Project Category'. Below the table, there are filters: '+ Add filter' and 'Remove all'. A filter is applied: 'AND Changed Date = 10 Days Before -...'. At the bottom, there is a 'Group By' section with a table header: 'Object ↑', 'Record ↑', 'Parent ↑', 'Attribute', and 'Operation ↑'.

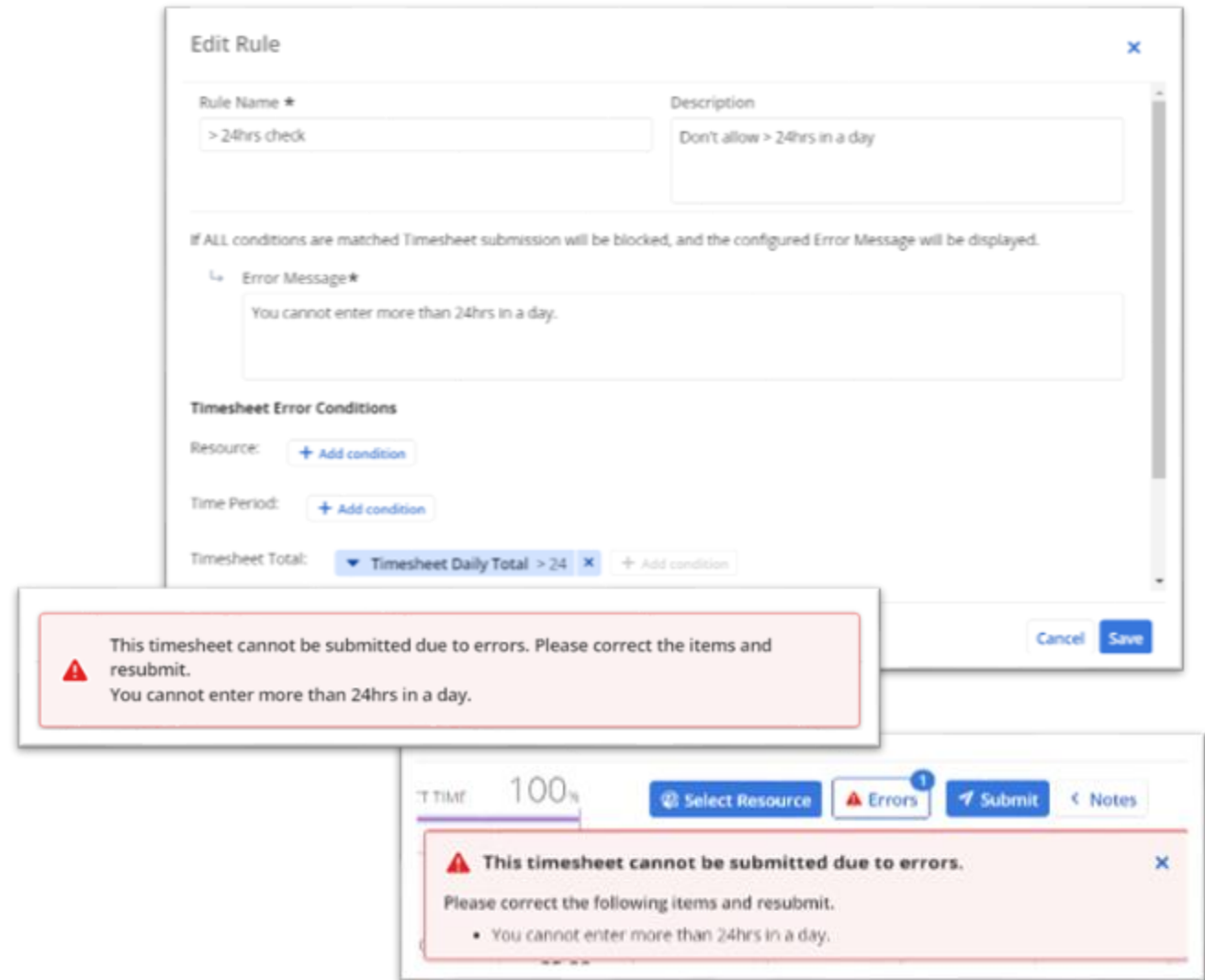
Classic UI – Object Administration

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).



The screenshot displays the 'Edit Rule' configuration window and two resulting 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

Below the window, two error messages are shown:

Message 1: This timesheet cannot be submitted due to errors. Please correct the items and resubmit. You cannot enter more than 24hrs in a day.

Message 2: This timesheet cannot be submitted due to errors. Please correct the following items and resubmit.

- You cannot enter more than 24hrs in a day.

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

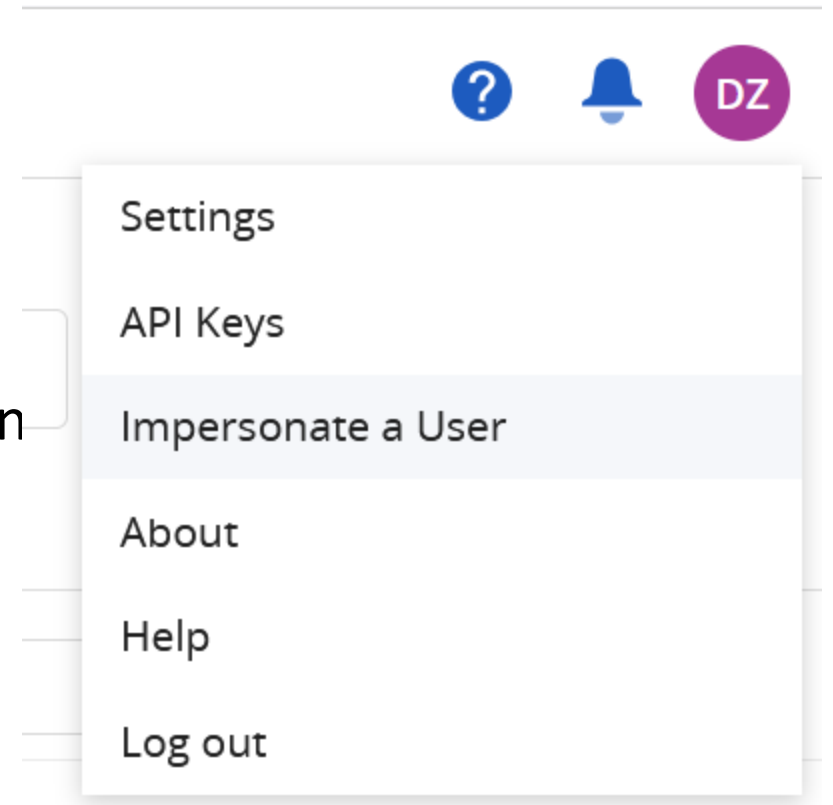
Impersonate a User



Search...



Recently Impersonated



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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Surveys

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



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- 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**



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