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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

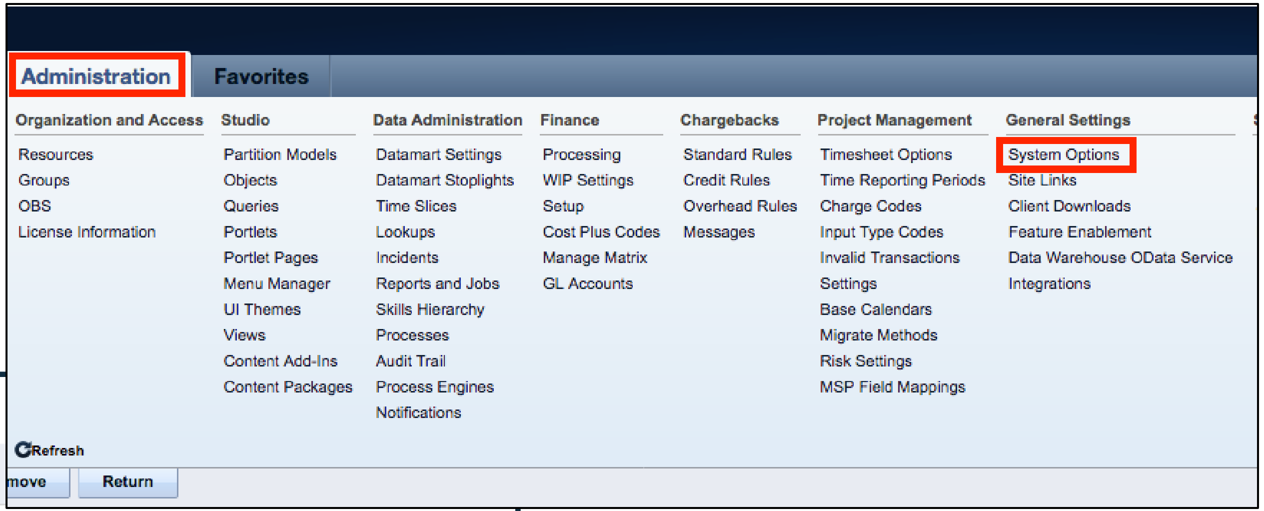
Administration in the Modern UX

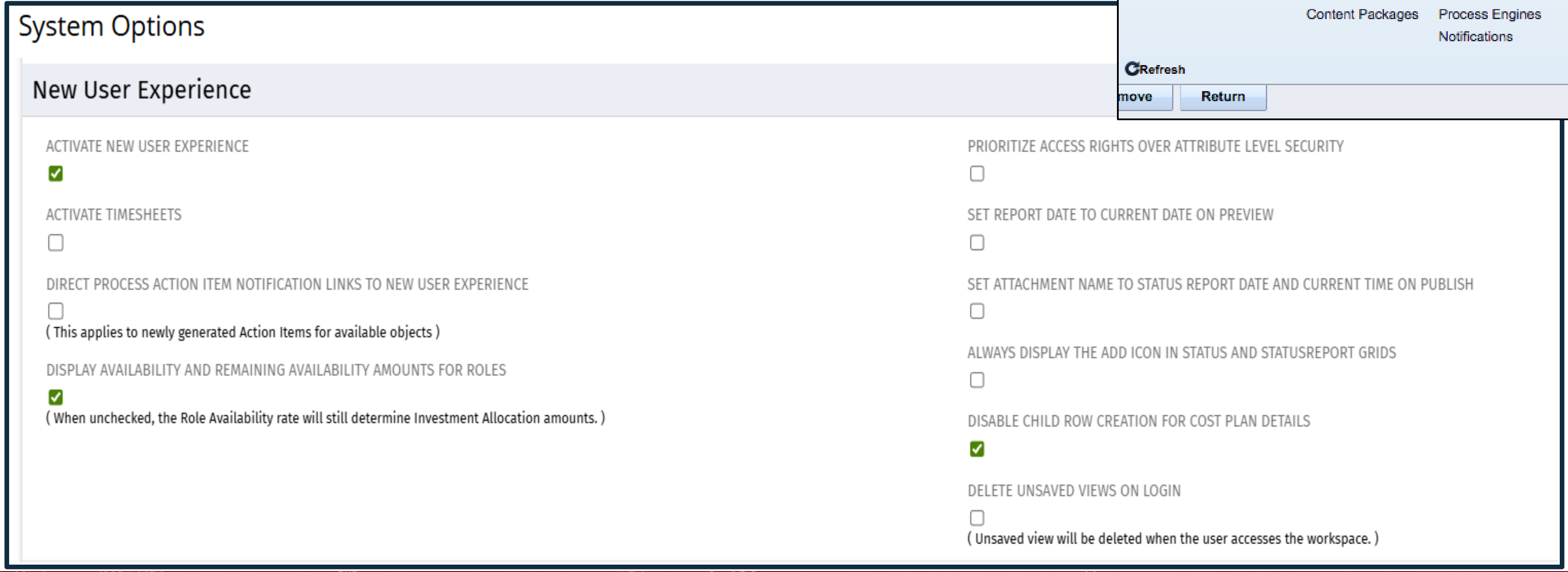
- Although it's still possible to use the Classic UI, most organizations adopting Clarity today are relying heavily on the Modern UX, and Broadcom continues to invest in this interface
- While some administration tasks remain in the Classic UI, more configuration options are steadily shifting into the Modern UX, which offers a more functional and user-friendly approach to settings
- Administrators need a clear understanding of what functionality to expose and who should have access to it
- Remember: Clarity is updated quarterly, with new features added frequently, so staying current is critical
- We recommend that all organizations regularly review release notes and attend available webinars to remain up to date on new functionality

Enabling Modern UX, Basic Navigation and Configuration

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”



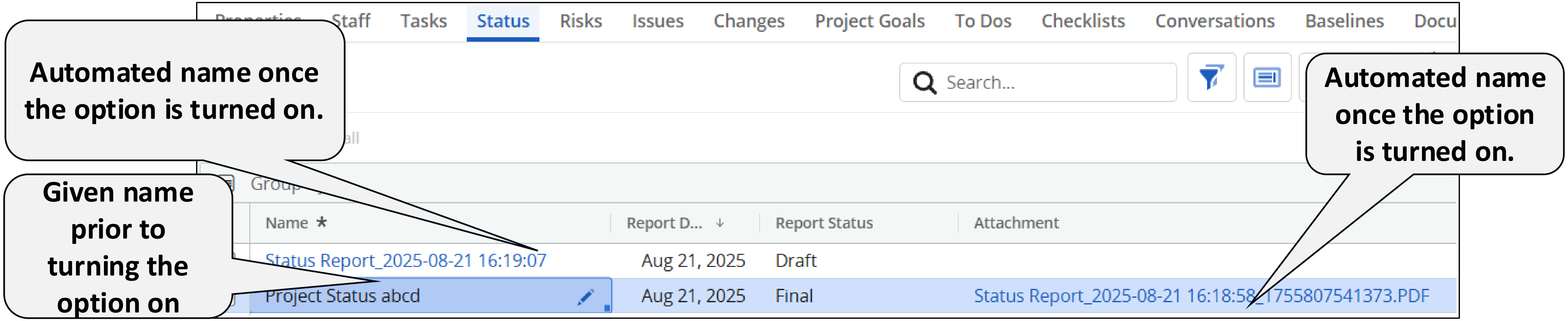


Activating the Modern UX (continued)

- First step is to enable the Modern UX through the Classic UI
  - Check the option for “**Activate New User Experience**”
    - This is mandatory to use Modern UX
  - Check the option (optional) for “**Activate Timesheets**,” if your organization uses timesheets
    - For organizations moving from Classic UI, timesheets can remain in the Classic UI but will miss out on the latest functionality
  - Check the option (optional) for “**Direct Process Action Item Notification Links to New User Experience**”
    - This will apply to newly generated Action Items for available objects
  - Check the option (optional) for “**Display Availability and Remaining Availability Amounts for Roles**”
    - When unchecked, the Role Availability rate will still determine Investment Allocation amounts

Activating the Modern UX (continued)

- Check the option (optional) for **Prioritize Access Rights over Attribute Level Security**
  - Select only if you wish access rights to take priority over FLS (Field Level security)
  - Typically left unchecked
- Check the option (optional) for **Set Report Date to Current Date on Preview**
  - Updates the Report Date to Current Date when previewing the status reports
- Set Attachment name to **Status Report Date and Current Time on Publish**
  - Automatically set the PDF attachment name; example shown below



Activating the Modern UX (continued)

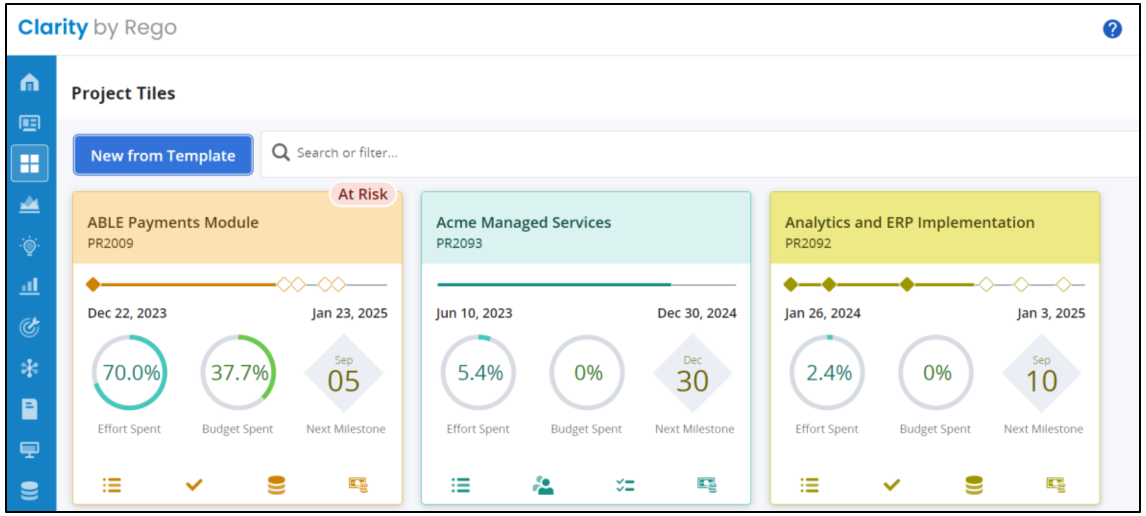
- Check the option (optional) for "**Always display the Add icon in Status and Status Report grids**"
- Check the option (optional) for "**Disable child row creation for Cost Plan Details**"
- Check the option (optional) for "**Delete Unsaved Views on Login**"
    - All unsaved views for the user will be deleted when the user logs in to the workspace

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

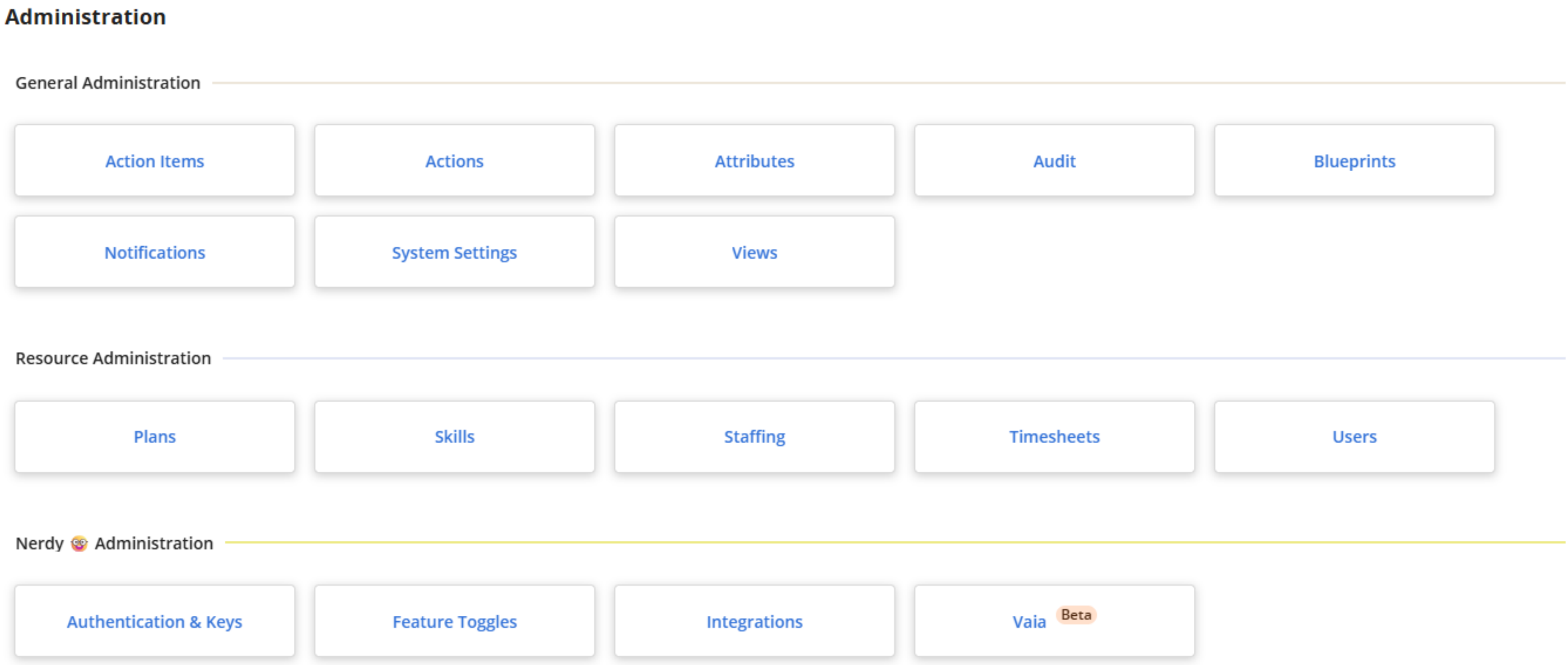
https://knowledge.broadcom.com/external/article/253271/how-to-create-a-link-to-the-modern-ux-fr.html

- 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

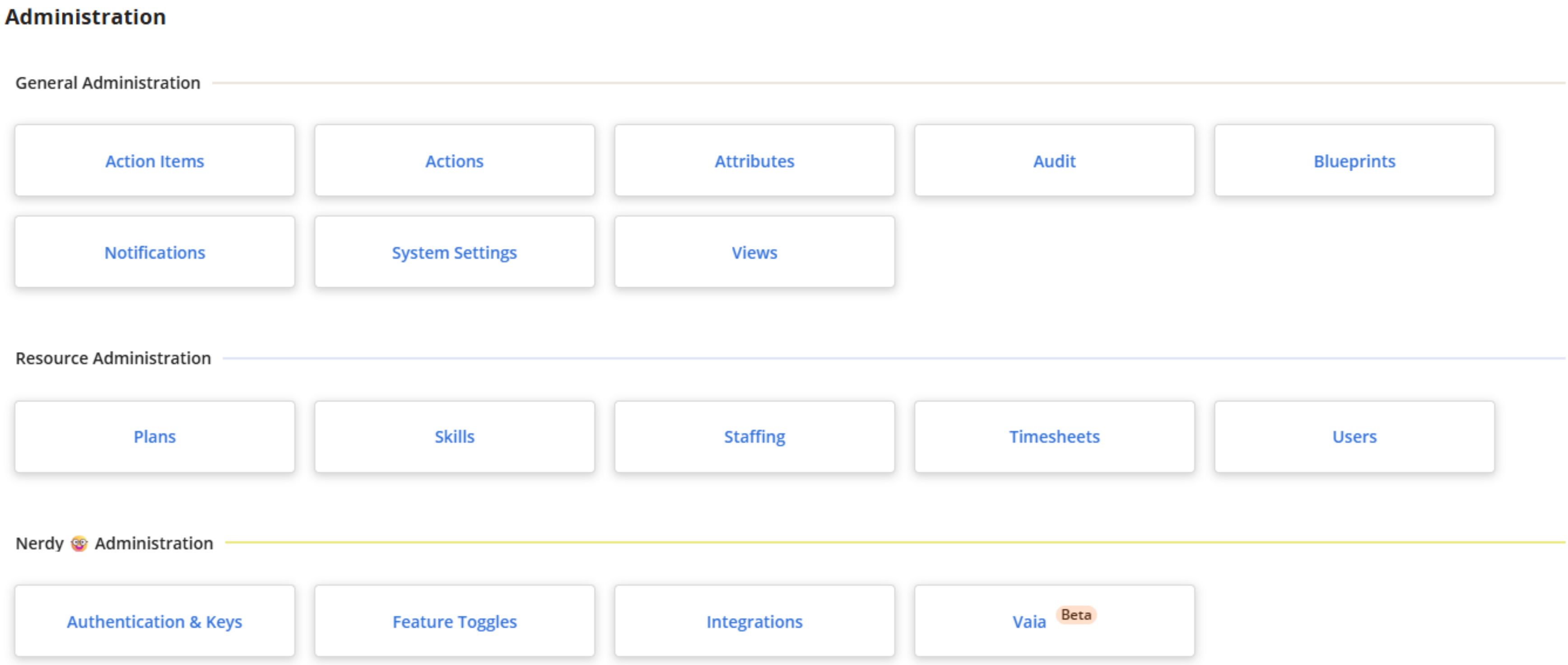
- Administrators can access the settings by using the Administration icon on the left side menu
- As part of the first time setup it is recommended to configure:
  - System Settings
  - Blueprints and Attributes



16.2.3 Allows grid customization
Screenshot shown

Basic Configuration – Administration Module

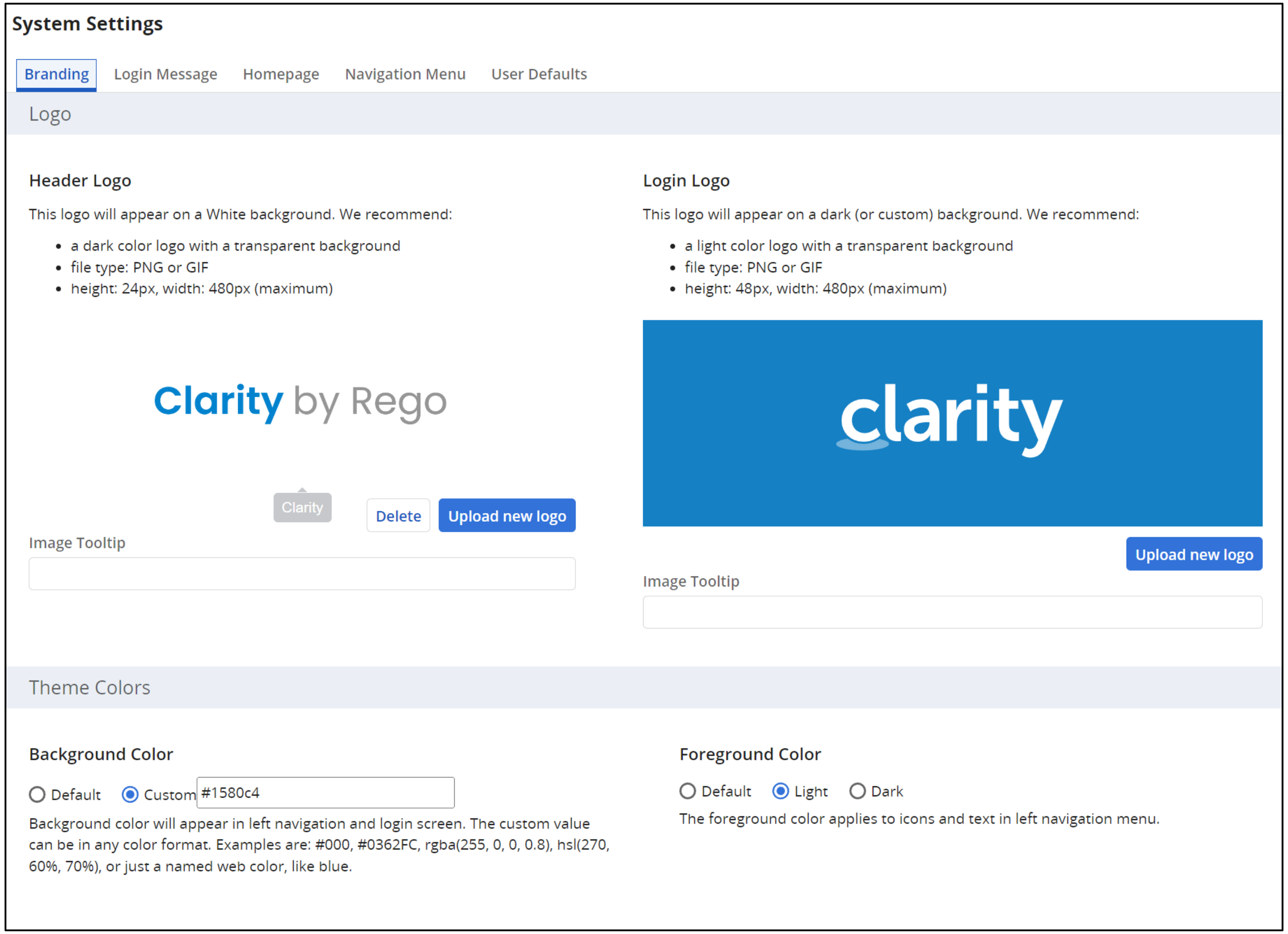
- The Administration module also includes additional settings for:
  - Action Items
  - Notifications
  - API Keys & Integrations
  - User Management
  - Work Plans configuration



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 with Branding**
  - Create a Login Message to notify users. Great for reminders, announce maintenance windows, etc.
  - Adjust Homepage settings to set a home page within the Modern UX per Clarity Security Group
  - Utilize Navigation Menu to set the navigation bar on the right icons and enable/disable modules
  - Define User Defaults to set the default unit of measure for users



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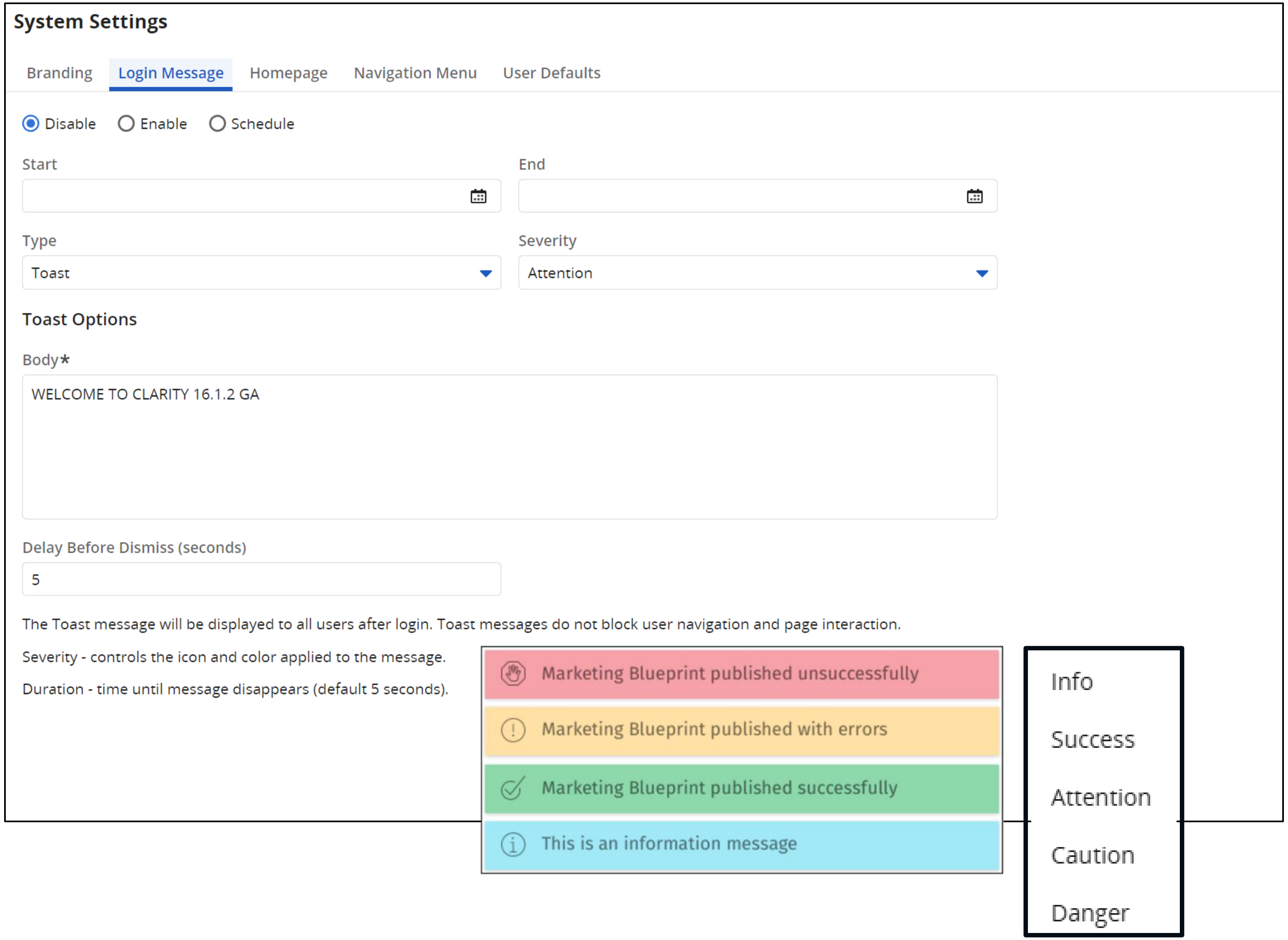

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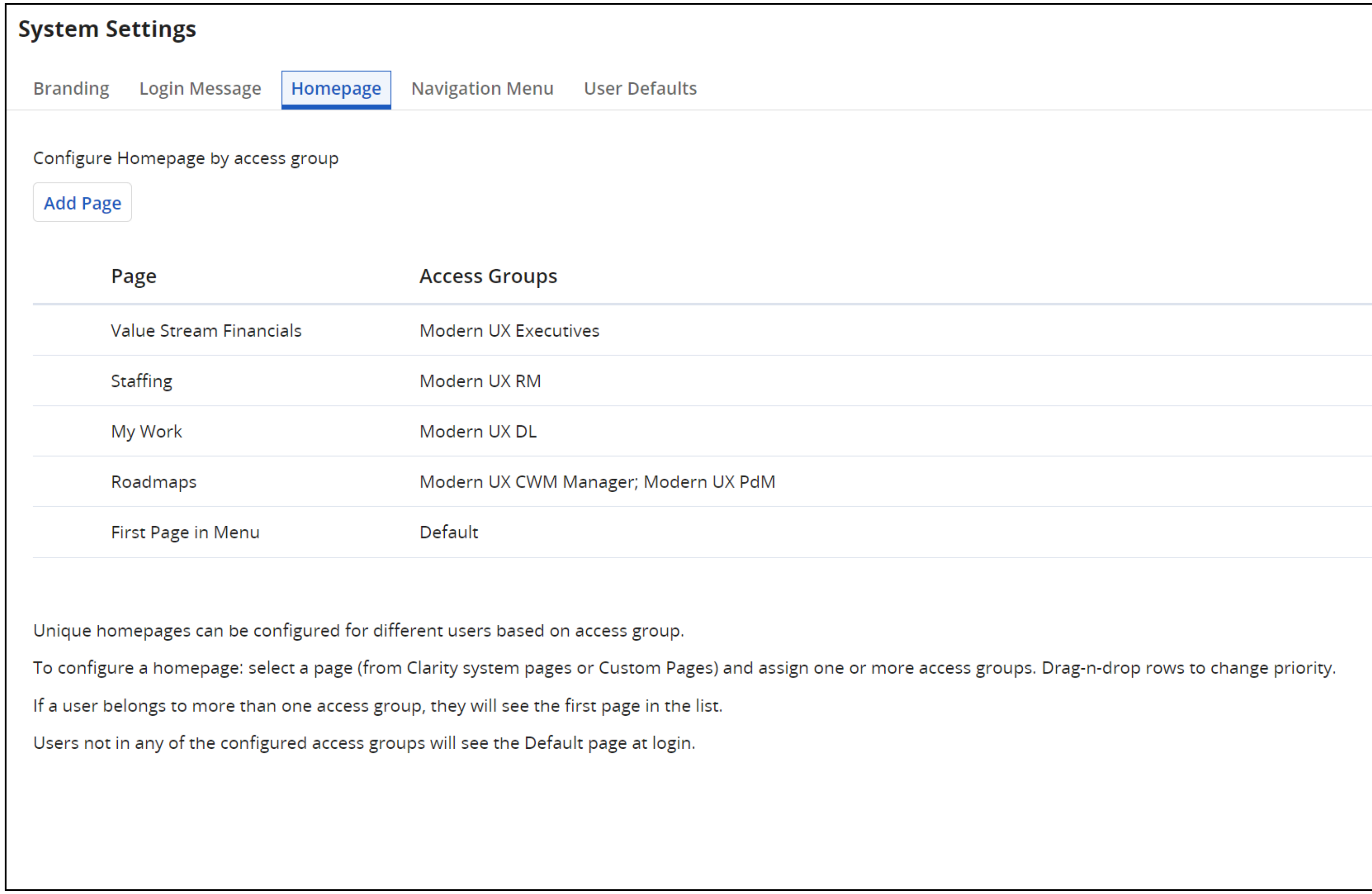

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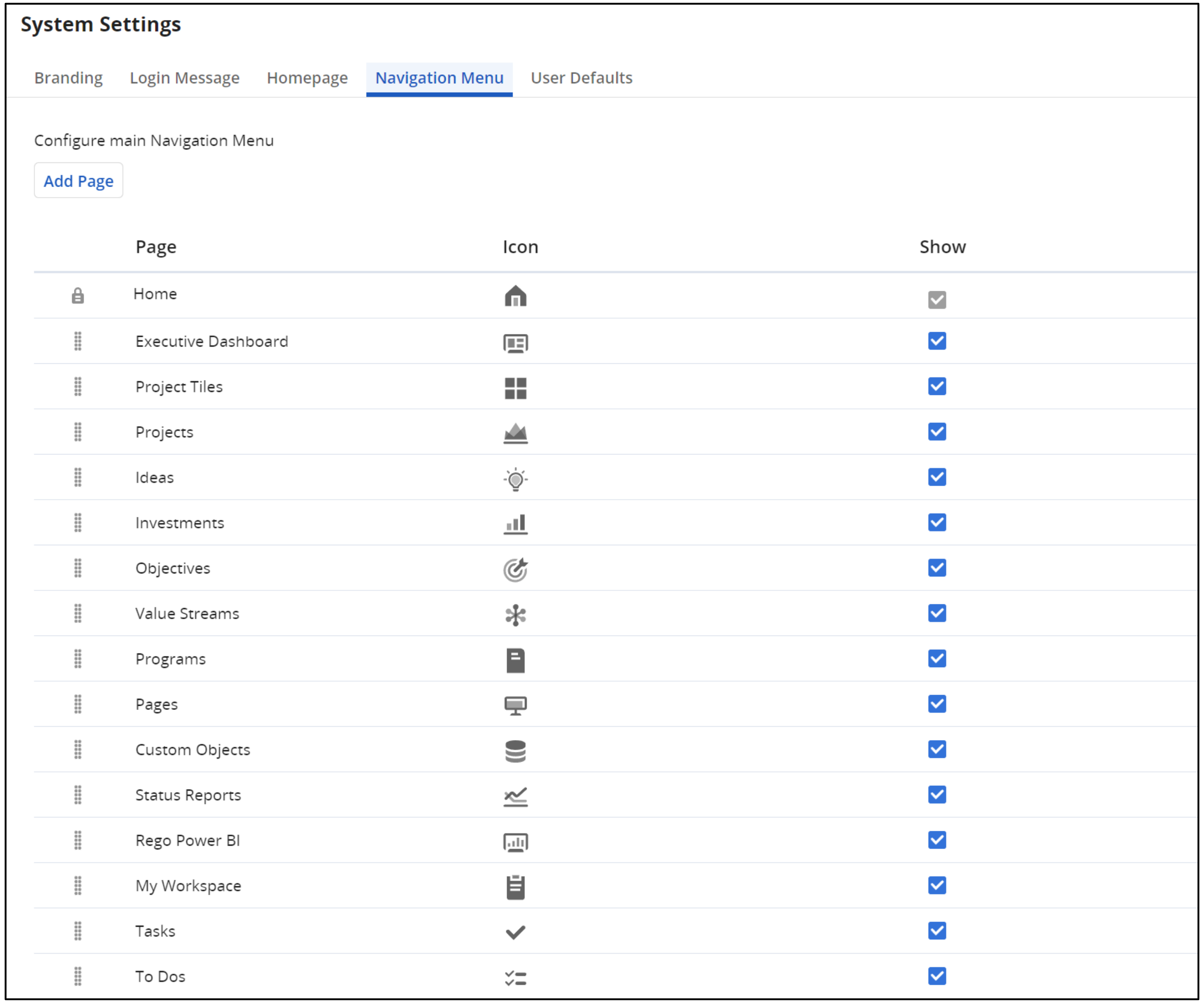
  - Adjust Homepage settings to set a home page within the Modern UX per Clarity Security Group
  - **Utilize Navigation Menu to set the navigation bar on the right icons and enable/disable modules**
    - **New menu items can be created based on custom object or custom investment, MUX Page, Teams and Reports**
  - Define User Defaults to set the default unit of measure for users



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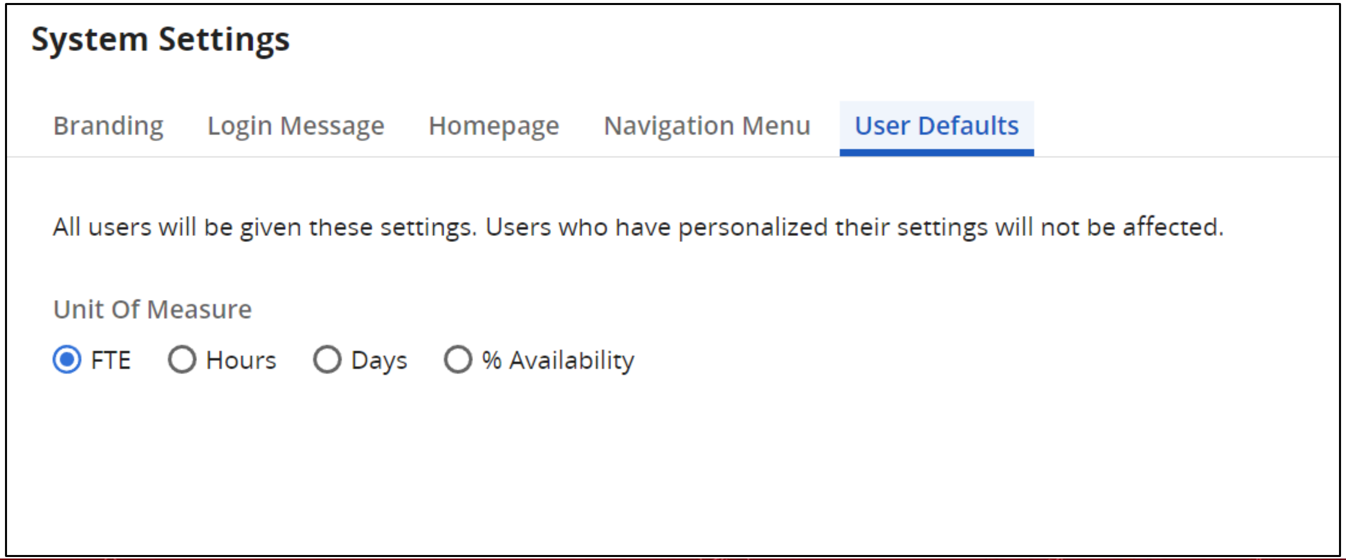
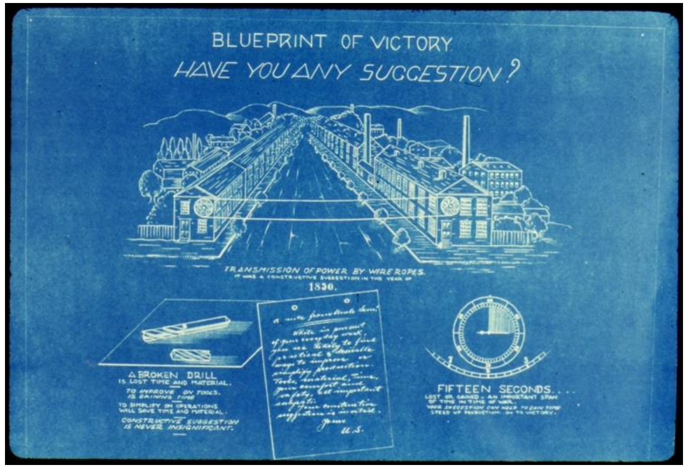


Blueprints and Attribute Administration

Overview

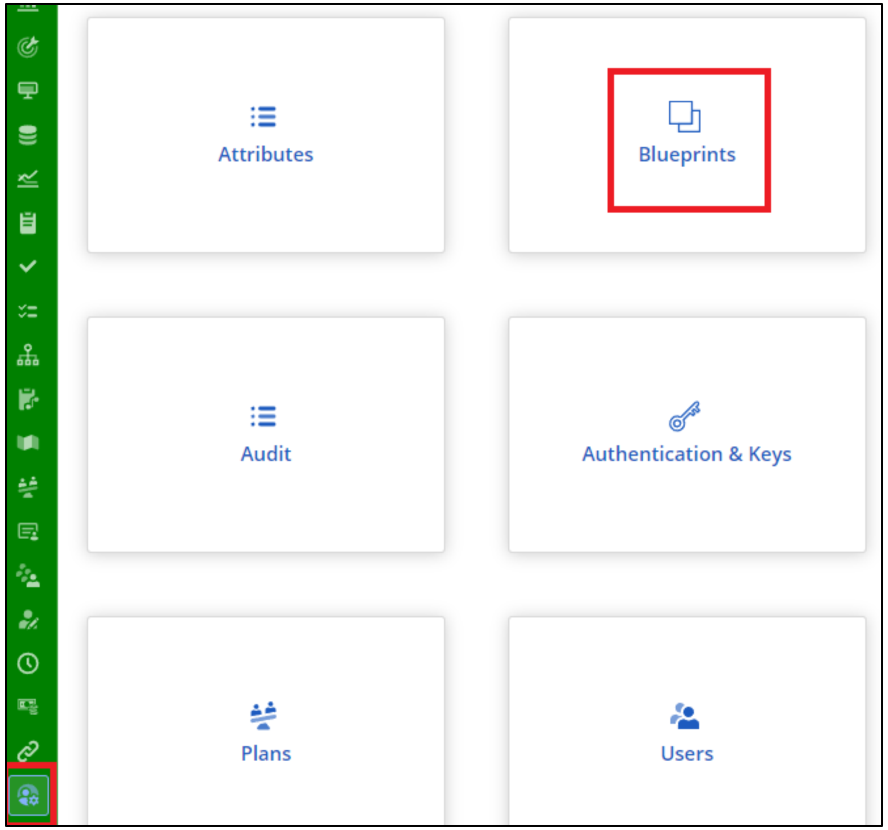
- Blueprints are configurable layouts in the New User Experience for Ideas, Projects, Custom Investments, Custom Objects and some MUX modules
- Allow users to see the right data at the right time, for the right work
- They can be assigned to specific instances by using templates, manually, or using processes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



Navigation

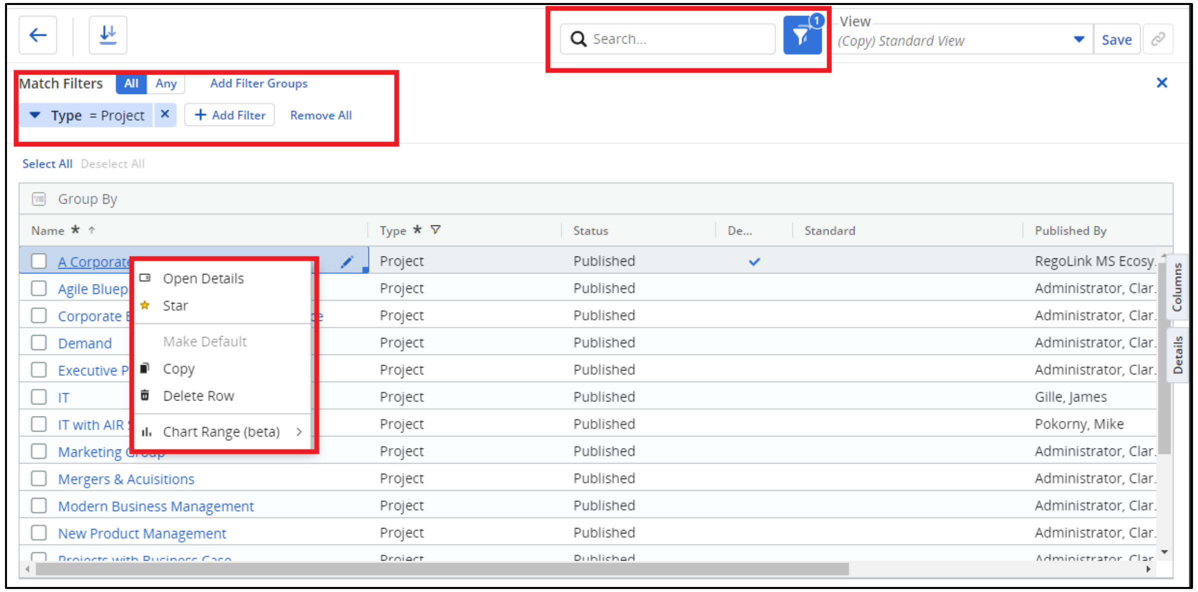
- To have the ability to view and update Blueprints, a user requires the following security rights (assigned through Classic UI)
  - Administration - Blueprints – Navigate, Blueprint – Create Copy, Blueprint - Delete – All, Blueprint – Edit – All, and/or Blueprint – View – All

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 created in the system



Blueprint List View

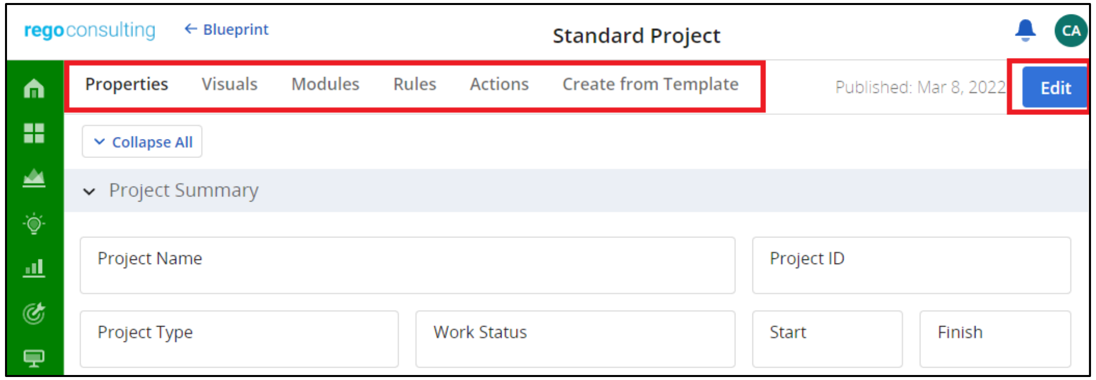
- See a list of all the Blueprints that have been created in the system
- Filter and navigate to a specific Blueprint, or perform an action:
  - Copy – Create a new Blueprint which is a one for one copy
  - Rename – Rename the Blueprint
  - Delete – Delete the Blueprint
  - Make Default
    - Any newly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

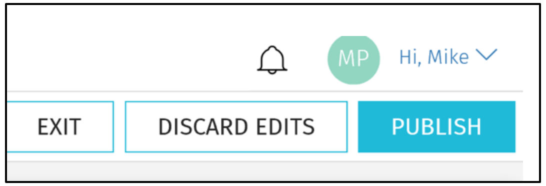


Blueprint Configuration

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 on these topics later)**
  - **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 in “View Only” mode
- Clicking on “Edit” mode will allow admins to perform changes and publish afterwards

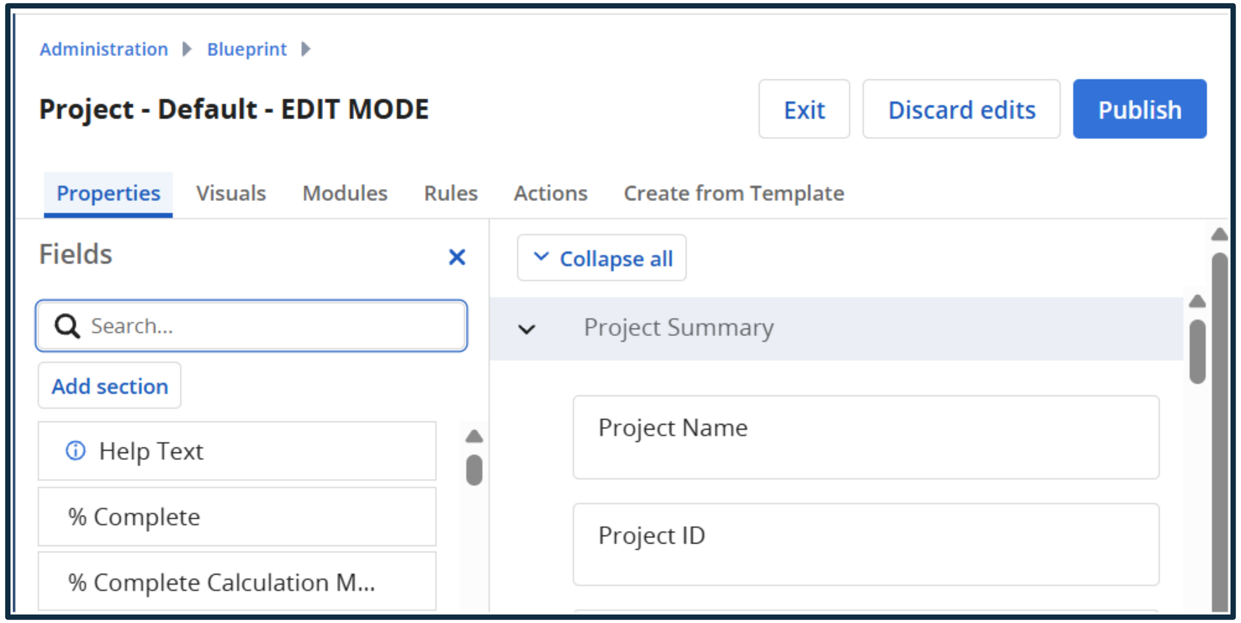




Properties

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)
  - Also includes Help Text that can be used multiple times in the Properties tab to provide different Help Text
- Fields that already exist on your Blueprint are greyed out



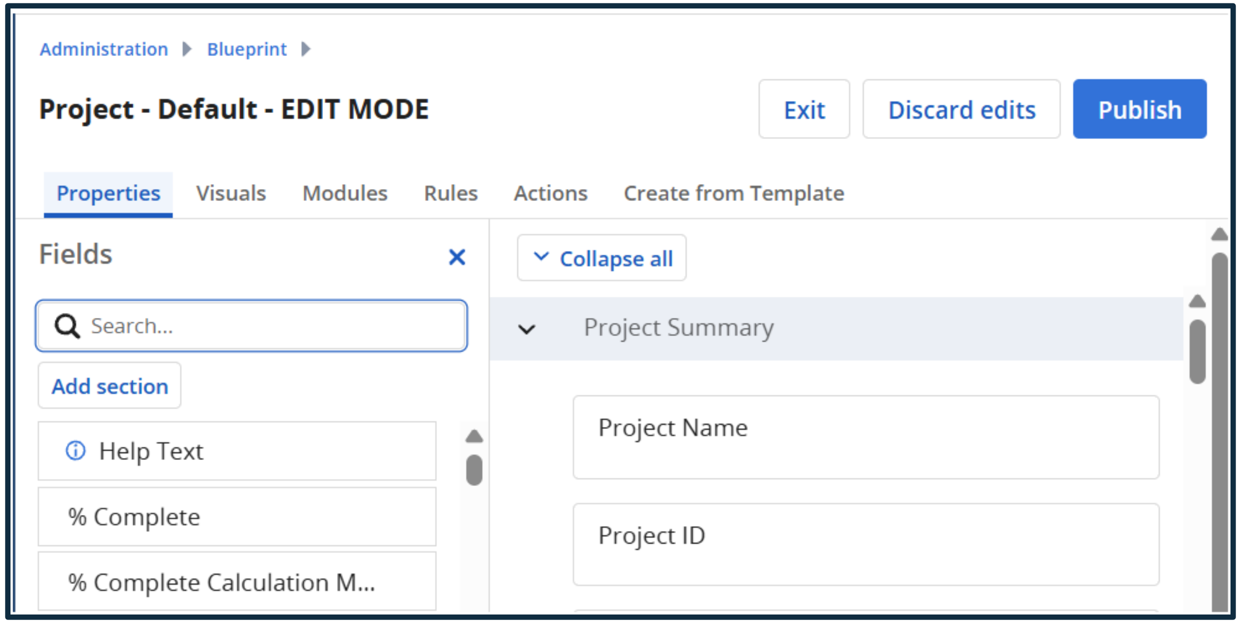
Note: The following attribute type is not compatible with the New User Experience:

- Custom Time-Scaled Value (TSV)

Properties

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 type is not compatible with the New User Experience:

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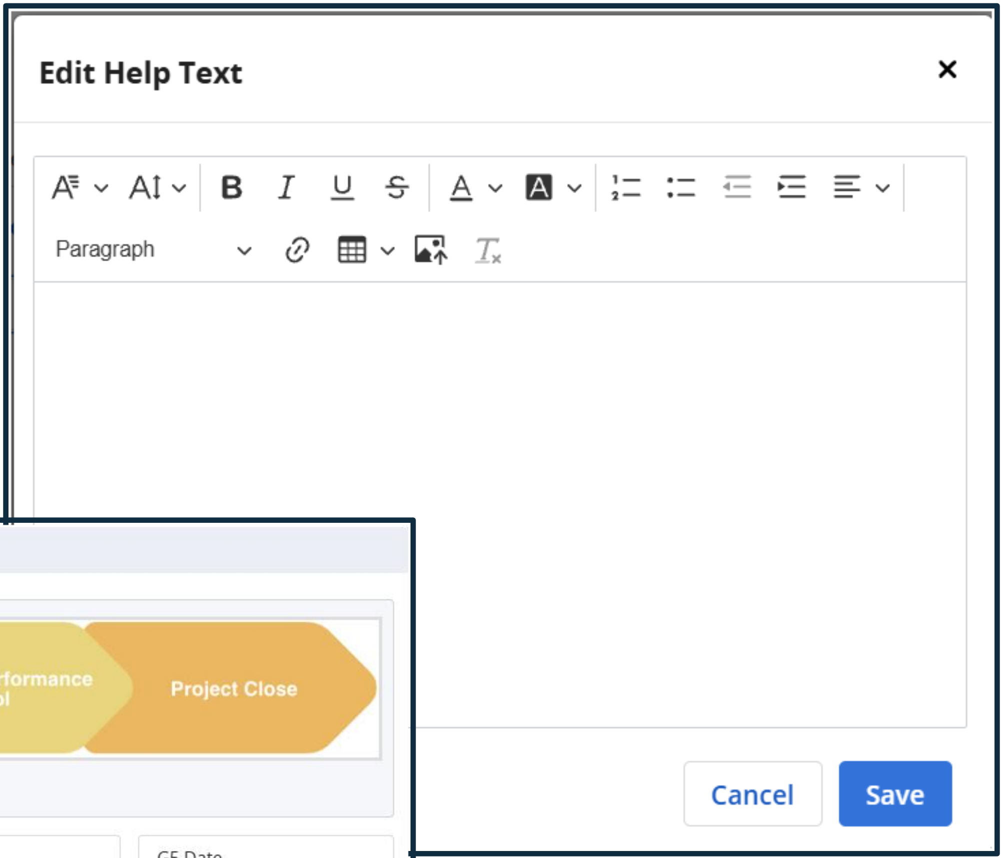
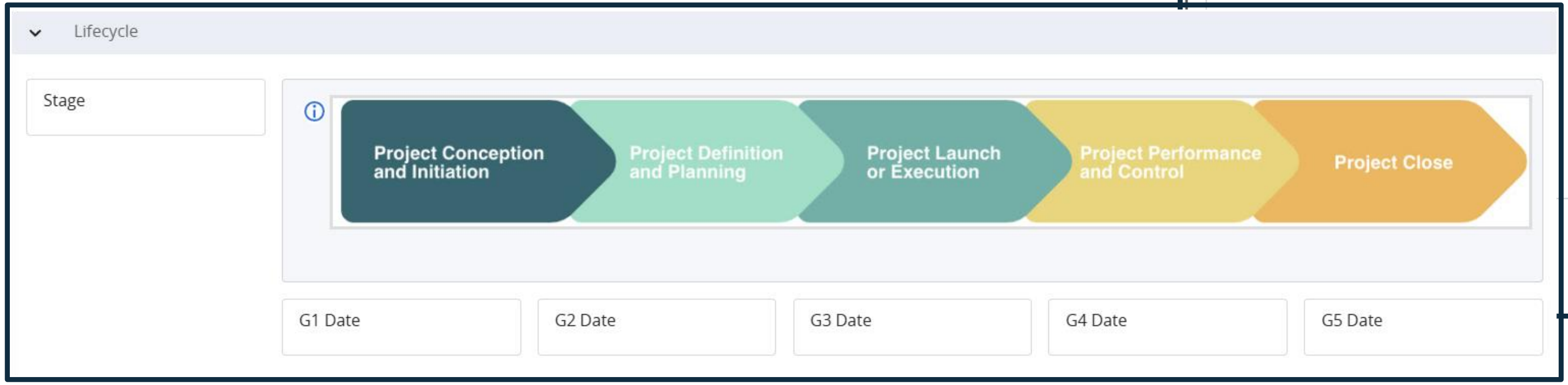
Help Text Screen

Includes various options such as

- Rich Text Formatted help content
- Links
- Tables
- Pictures
- And more!

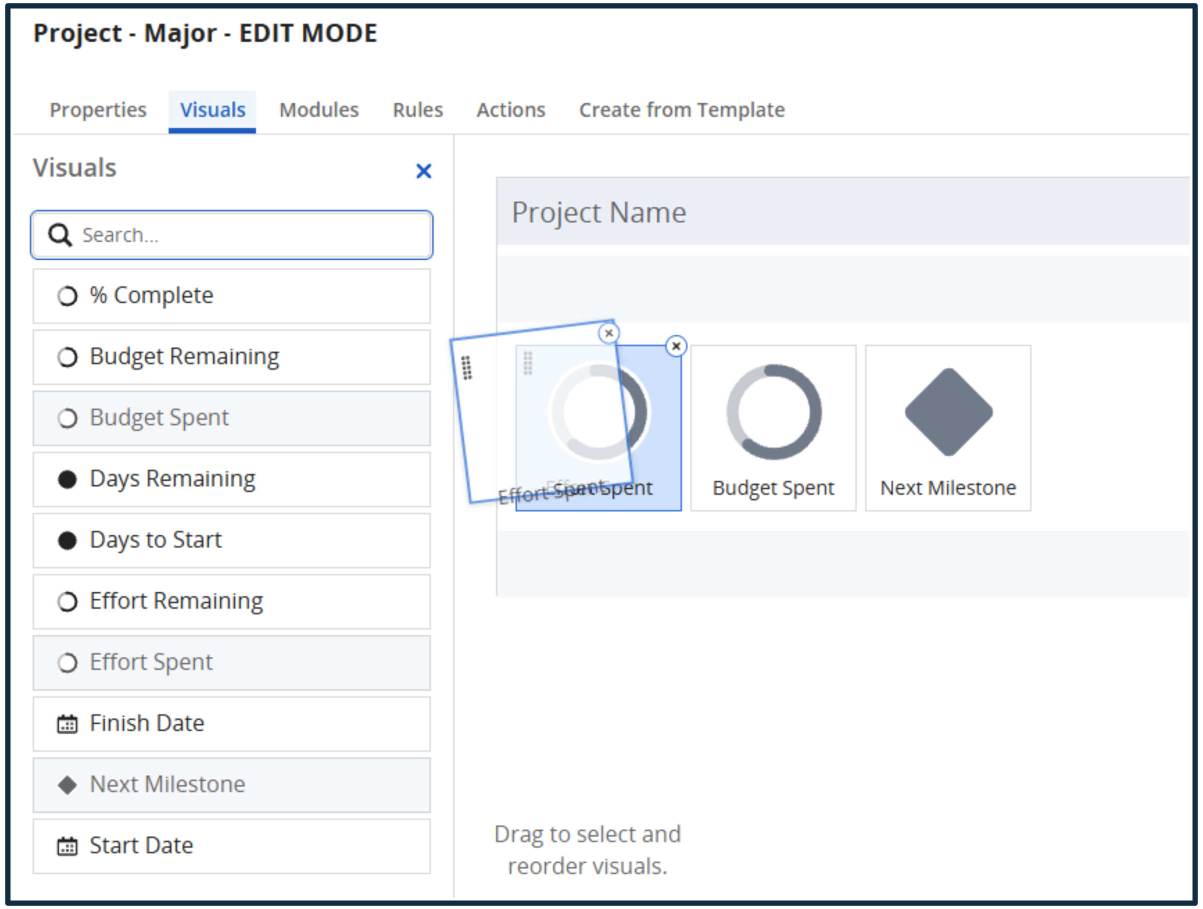




This examples aligns the image of stage gates with the corresponding date fields

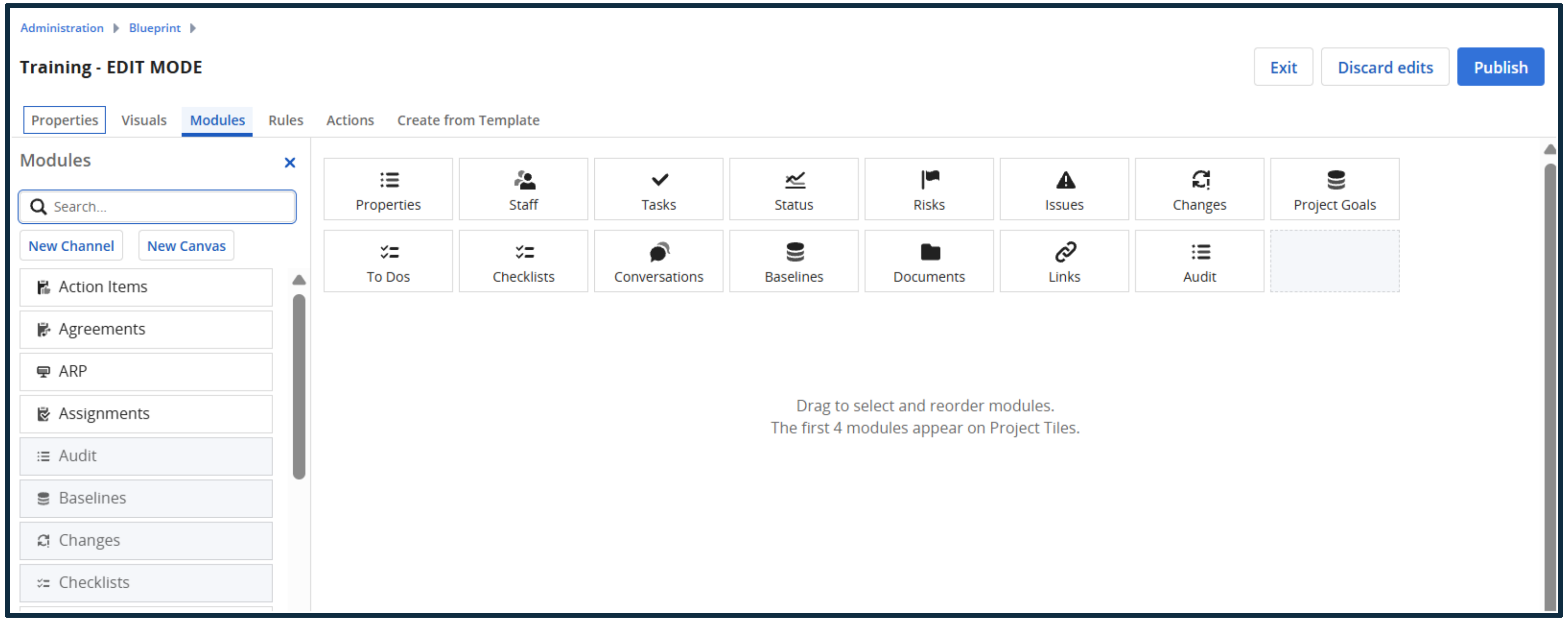
Visuals (Projects Only)

- **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
- 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



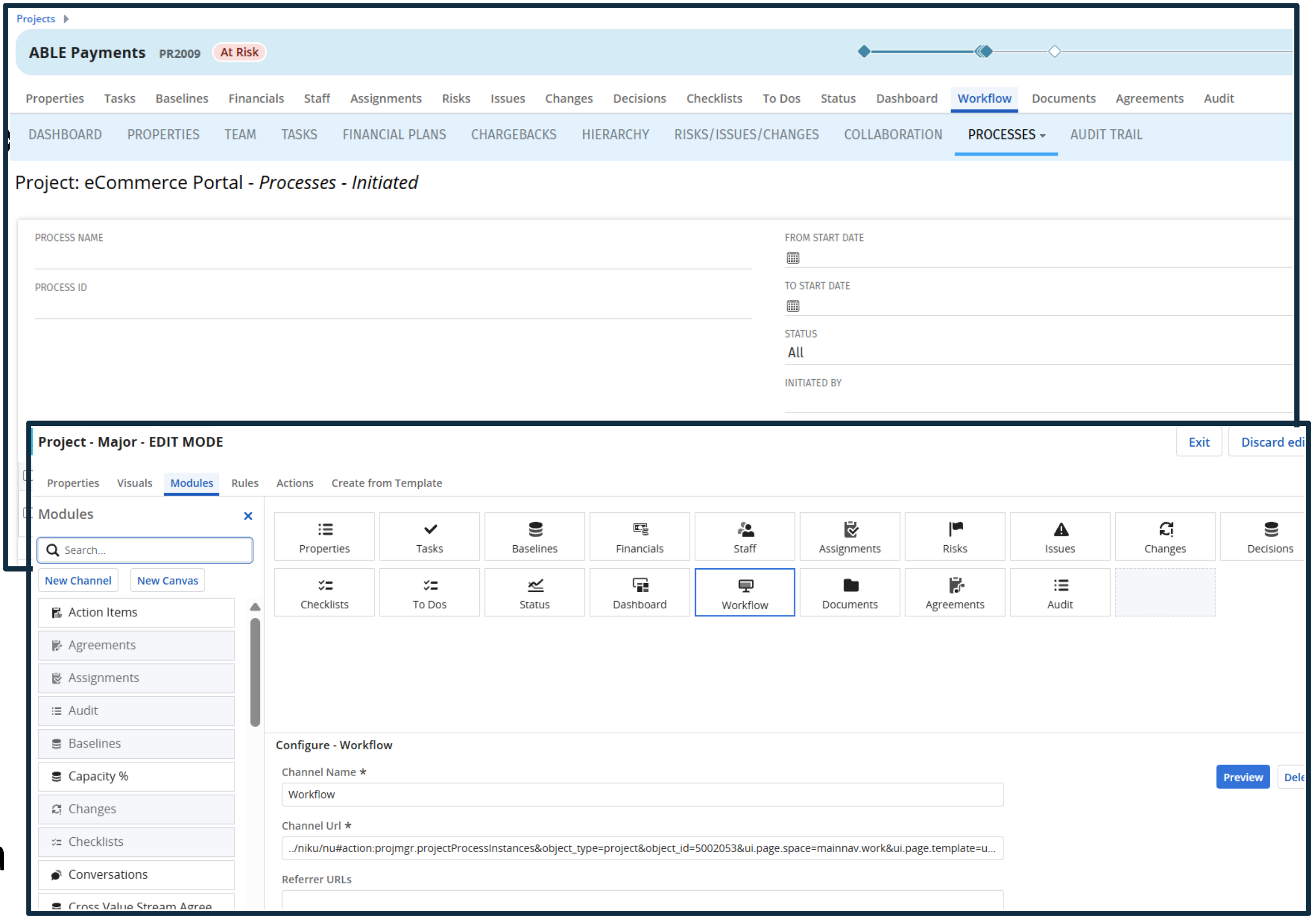
Modules

- 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 functionality like project financials, To-Dos, 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

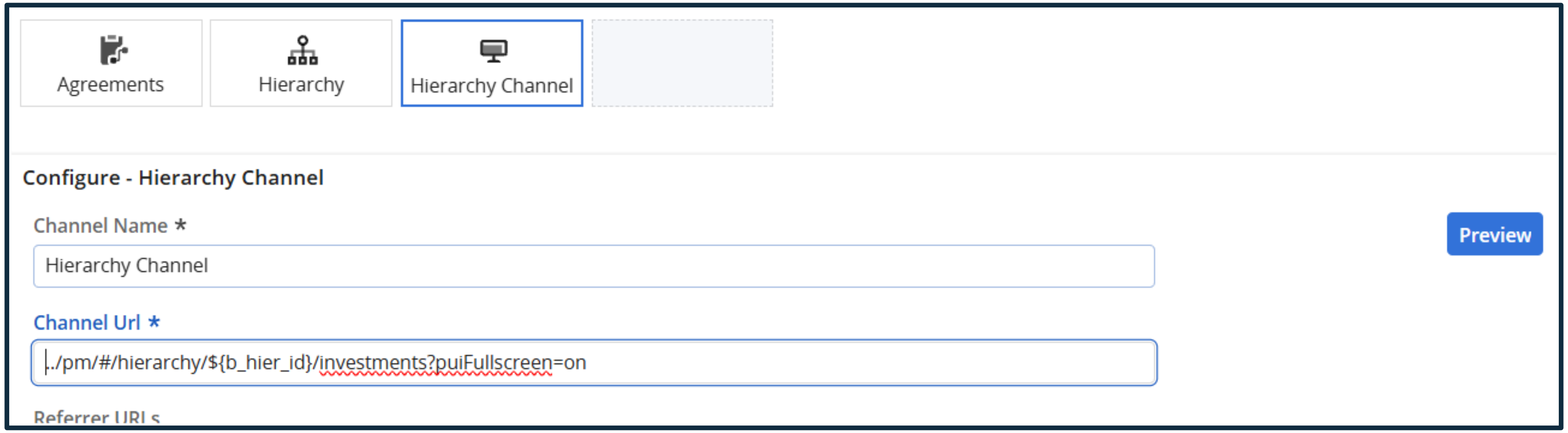
- Channels are configurable Modules which embed: Classic UI URLs (recommend Phoenix Theme and relative URLs), Modern UI URLs and External Applications
- Users can stay directly in Clarity and get the additional pertinent information
- Configuration
  - Channel Name
  - Channel URL
  - Referrer and SSO Configuration
  - Use attributes as parameters for the URL
- Tabs and Menu can be suppressed in channels and parameters can be passed to a channel



Modules – Channels

Channels

- For Clarity application URLs (Classic or Modern), use relative URL –
  - Use “..//pm/…..” Instead of “https://cppmxxxx.ondemand.ca.com/pm/…..”
- Add the following parameter to the Channel URL field to suppress menu: &puiFullscreen=on
- To hide the tabs, append the following parameter: &puiHidePPMTabs=on
- If there are no parameters passed, change the first "&" to "?“



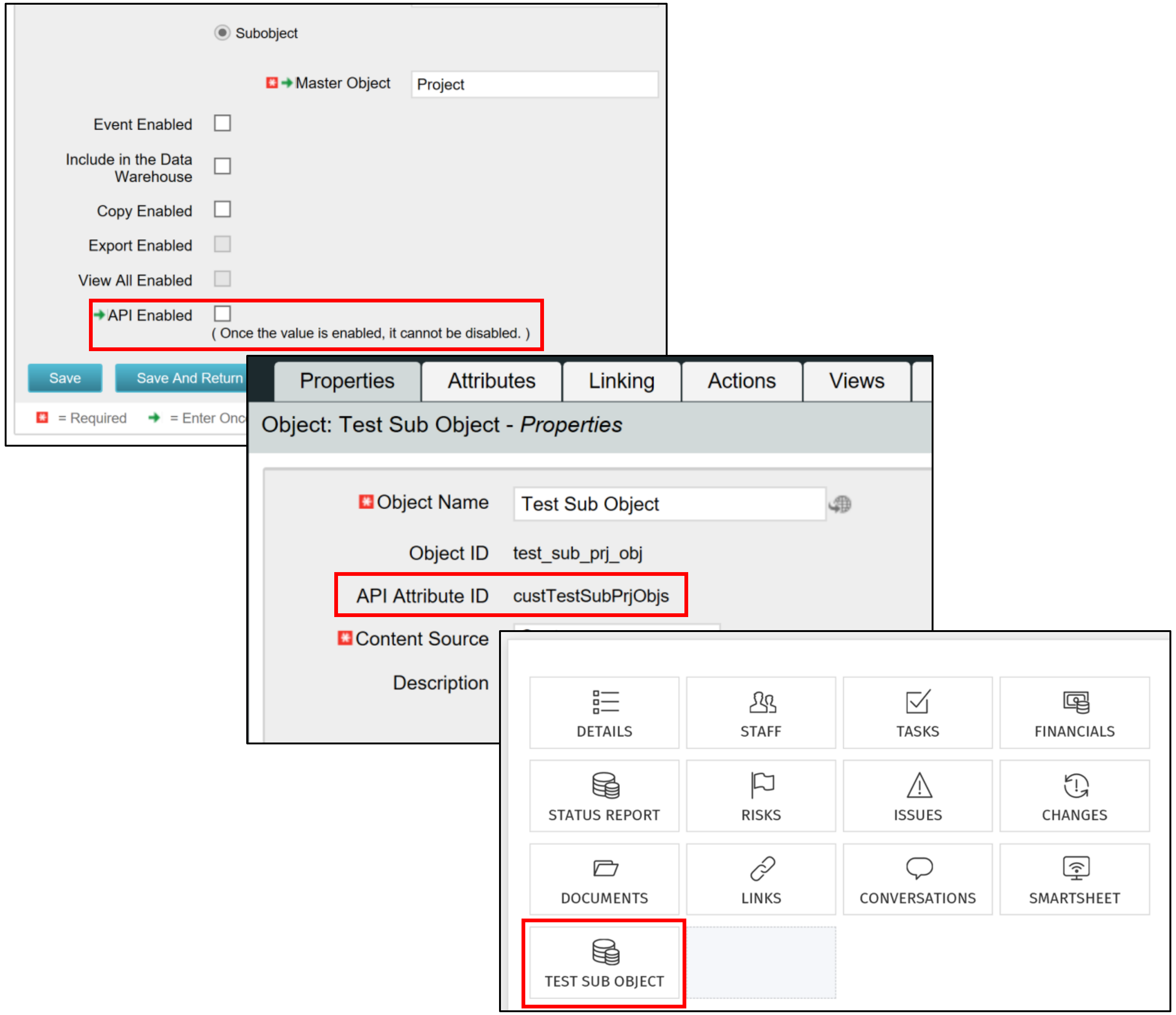
Modules – Channels

Parameters passed

- project id = ${_internalId}
- projectCode = ${code}
- project name =${name}
- project manager =${manager}
- logged in user =${_userId}
- logged in user's internal user ID 5 million number=${_userInternalId}
- logged in user's internal resource ID 5 million number=${_resourceInternalId}
- You can also reference custom attributes with the ${<api alias>}

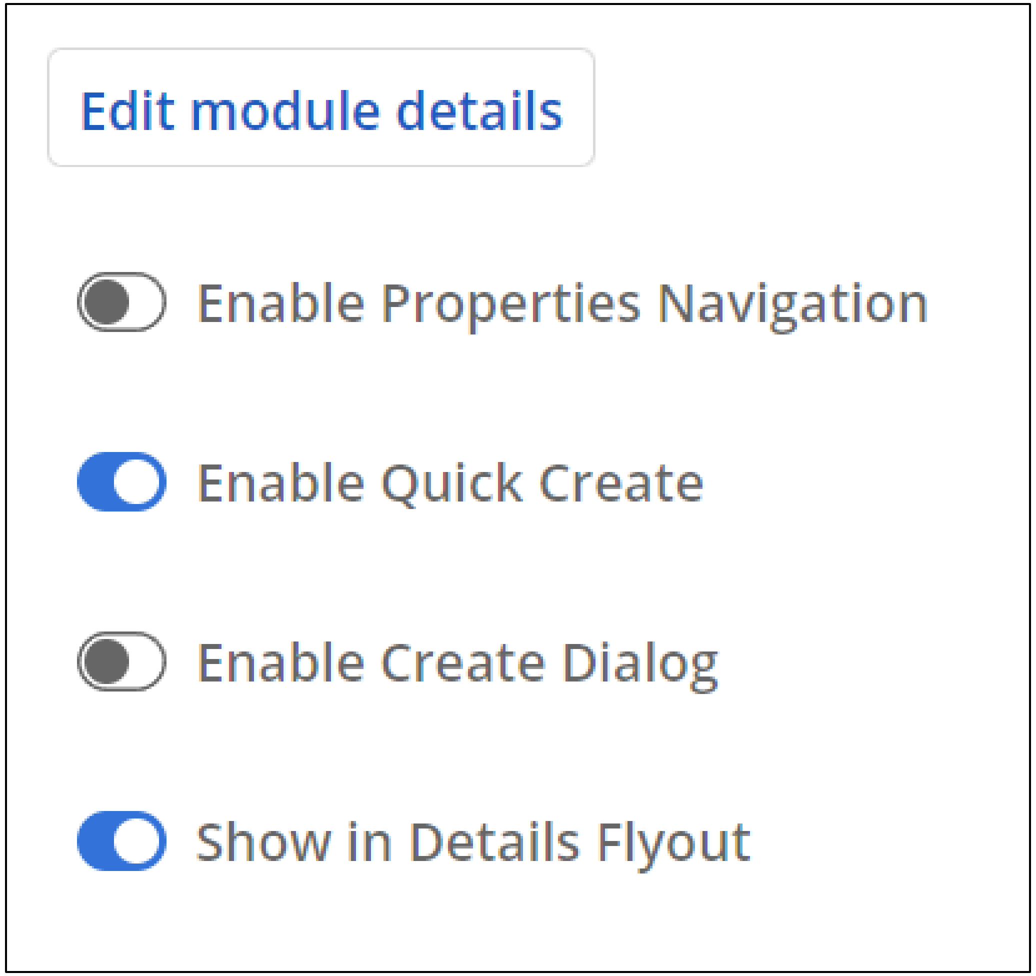
Modules – Custom Sub-Objects

- 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



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 certain UI actions or data actions, when met to a specific blueprint
- There are four types of Rules:

View Page

- Allows the administrator apply conditional logic to perform UI actions, when met to a specific blueprint
- Supports conditions based on multiple attributes

Attribute Update

- Allows the administrator apply conditional logic to perform Data Actions as well as UI actions, based on an update to an attribute
- Can apply multiple actions per update of a target attribute

Security Update

- Allows the administrator apply conditional logic to perform Security Rights update actions, based on update to a specific resource lookup attribute

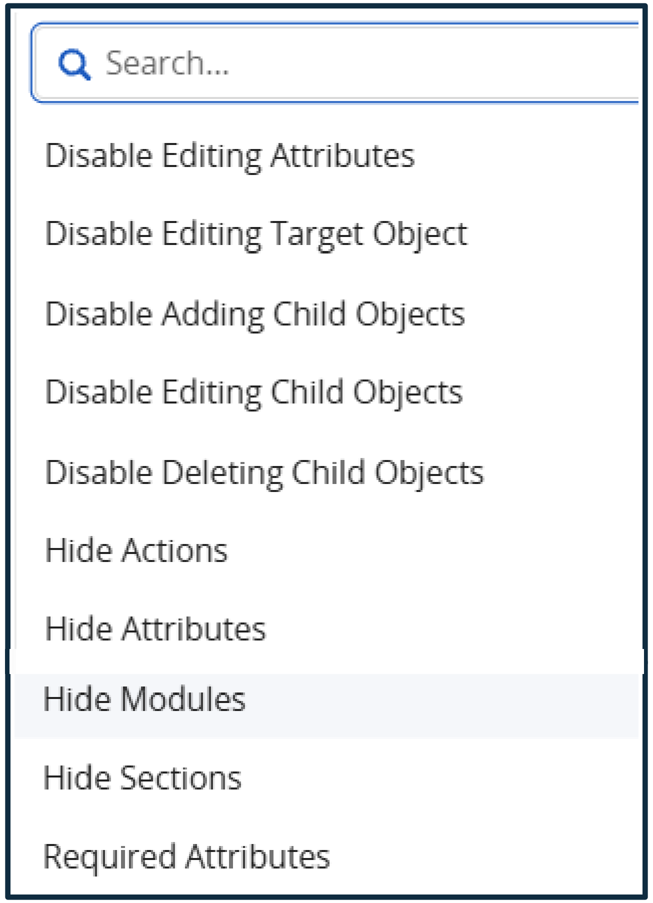
Conditional Required Modal

- Allows the administrator apply conditional logic to forcibly require certain set of fields with a Properties-like painted layout

UI Actions

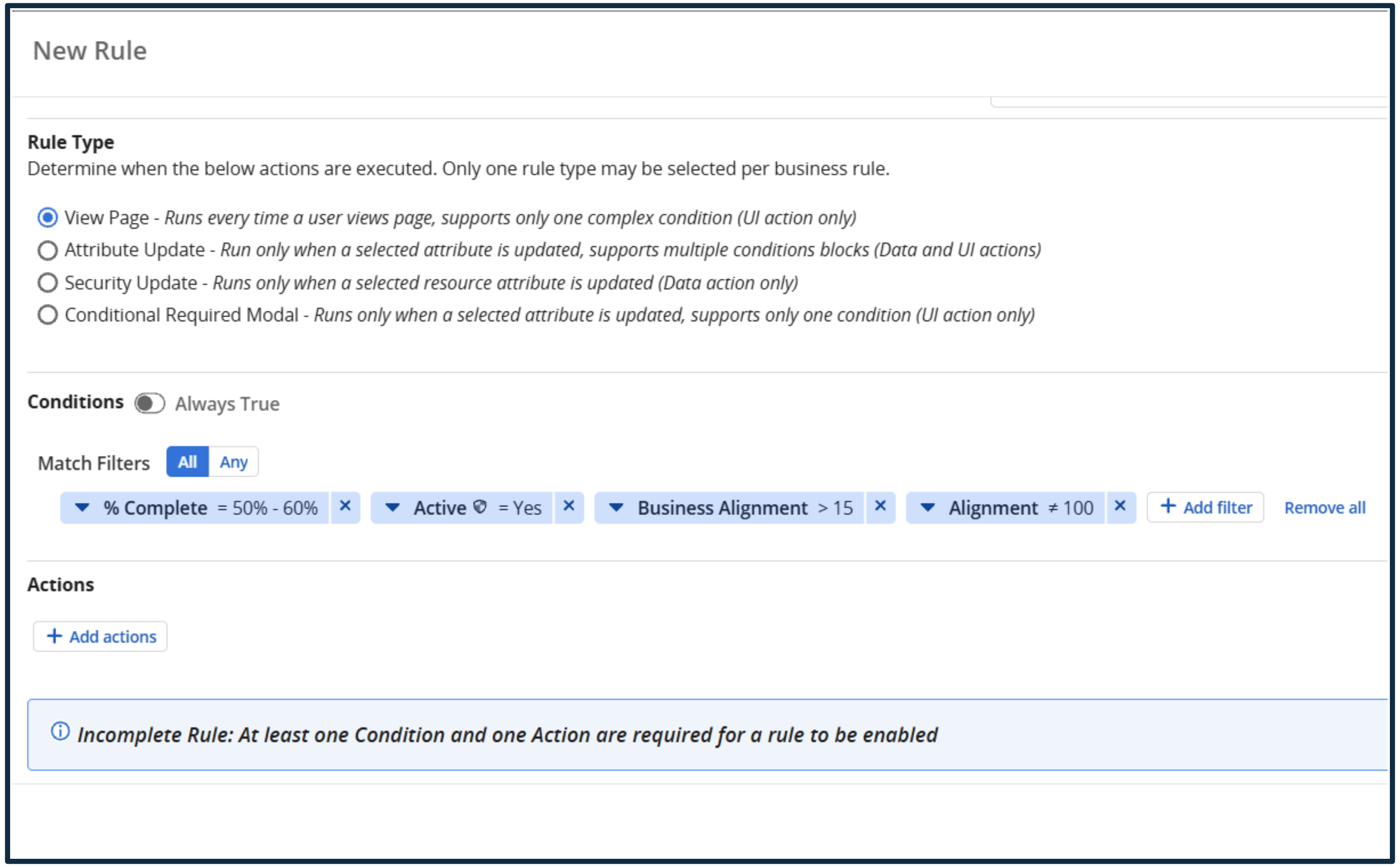
UI Actions that can be performed with a Blueprint rule:

- **Disable Editing Attributes**: Disable specific attributes to be edited
- **Disable Editing Record**: Disable the entire record from being edited
- **Disable Adding Child Objects**: Disable adding a new instance of the specified child object
- **Disable Editing Child Objects**: Disable editing any instance of the specified child object
- **Disable Deleting Child Objects**: Disable deleting any instance of the specified child object
- **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



View Page Rule

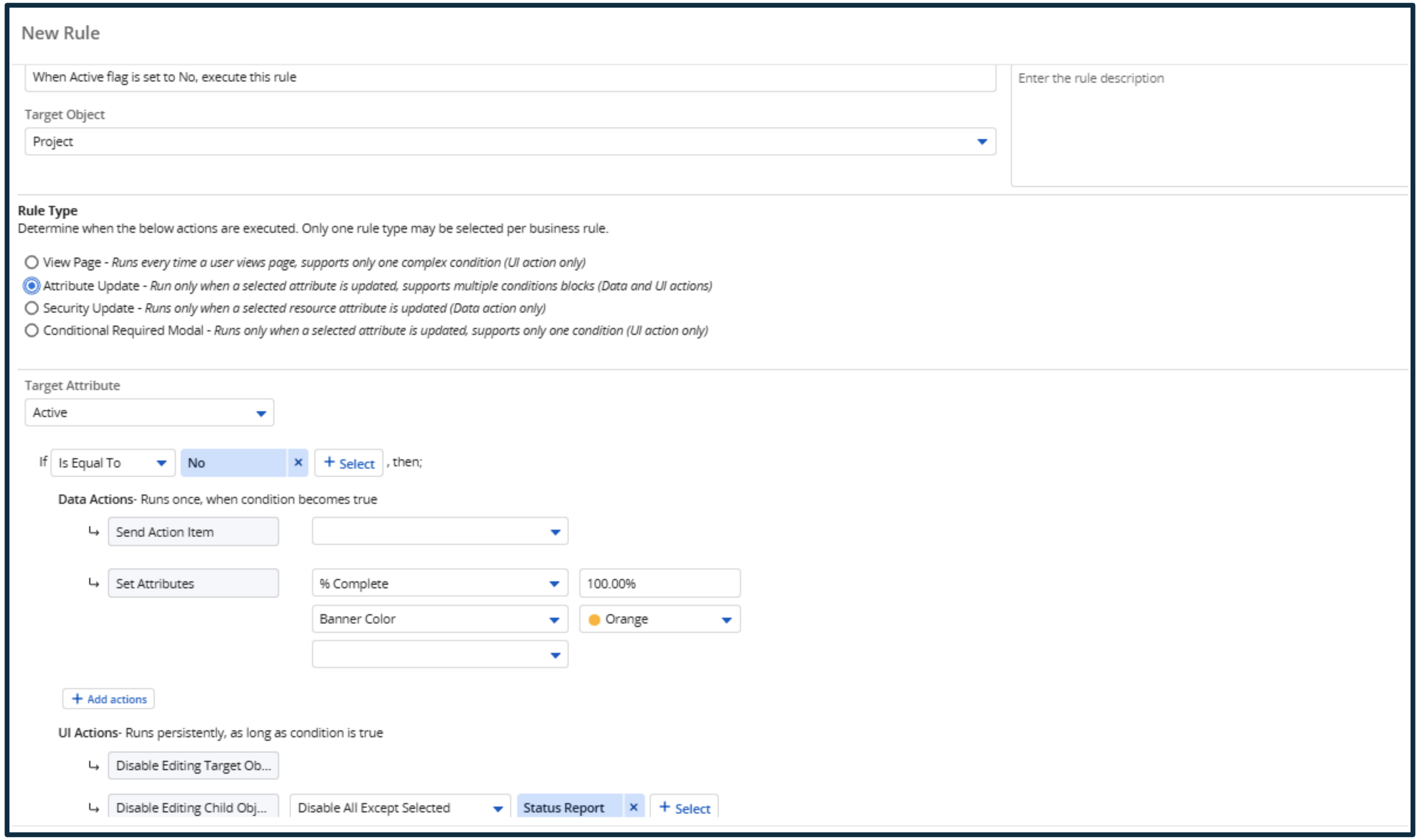
- Allows the administrator to apply conditional logic to perform UI actions, when met to a specific blueprint
- Supports conditions based on multiple attributes, and supports “All” or “Any” conditions
- Only UI actions are supported with View Page rule



Attribute Update Rule

- Allows the administrator apply conditional logic to perform Data Actions as well as UI actions, based on an update to an attribute
- Can apply multiple actions per update of a target attribute
- Data actions include
  - Updating the value of an attribute
  - Or sending an action item

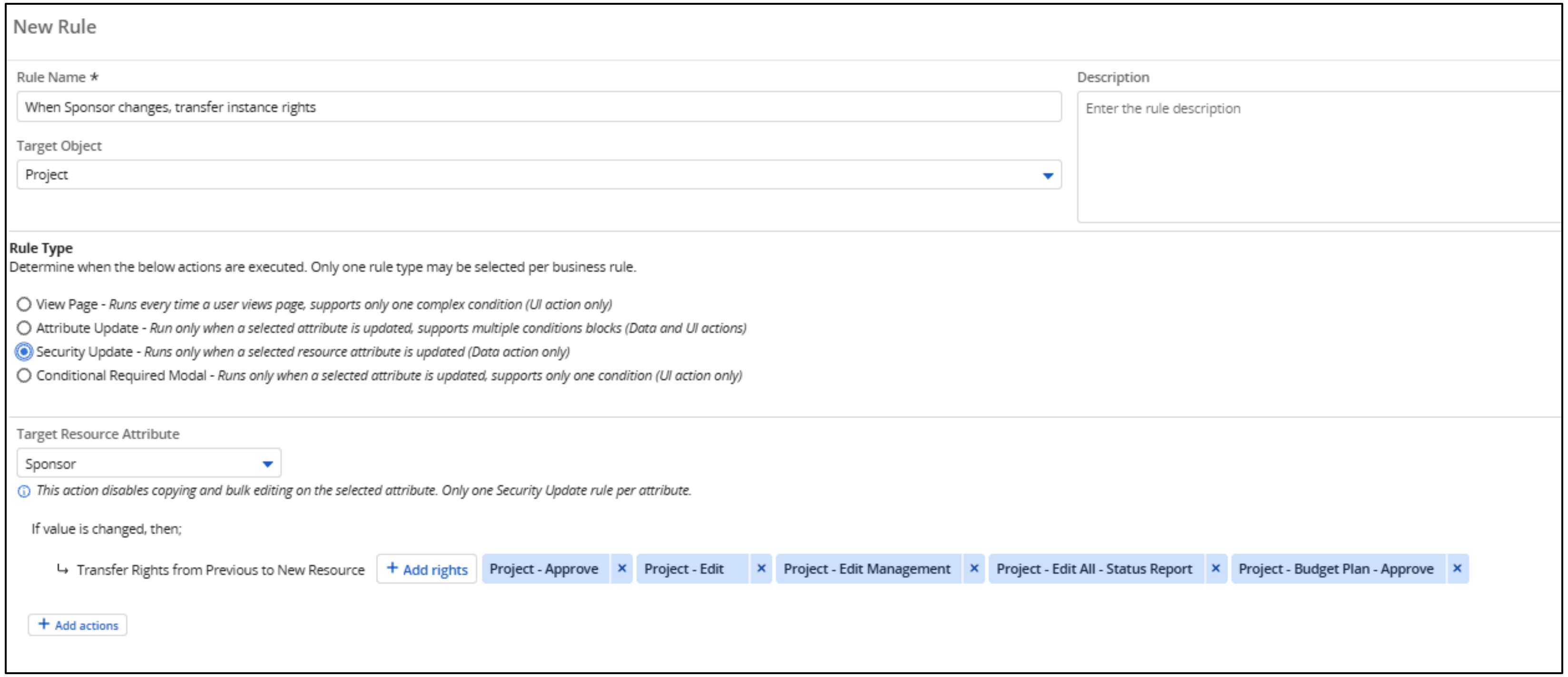
Note: Implementing data actions with **Rules** can be quicker and easier than through a process with a **System Actions**



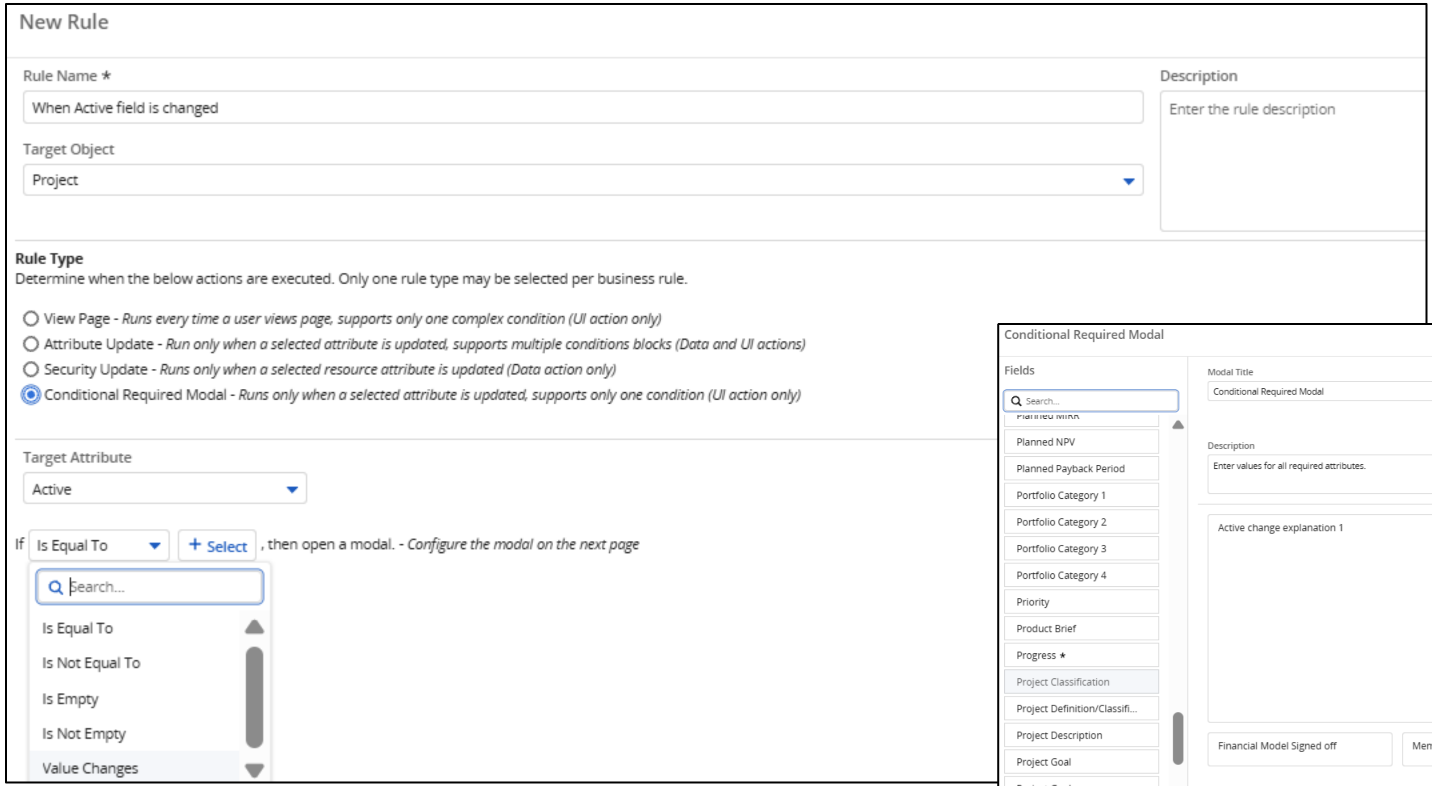
Security Update Rule

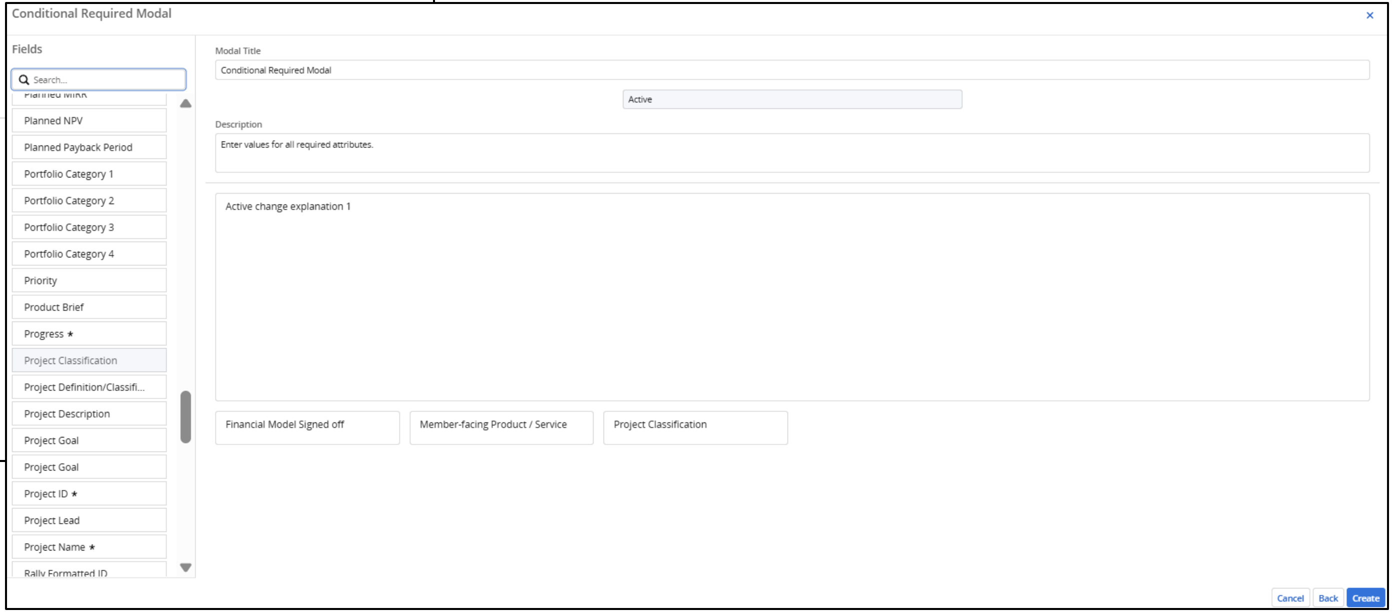
- Allows the administrator to apply conditional logic to perform Security Rights update actions, based on update to a specific resource lookup attribute

- Used to transfer (or grant or revoke) specific access rights when a target resource lookup attribute such as Sponsor, Business Owner, or Backup Project Manager is updated in project properties



Conditional Required Modal Rule

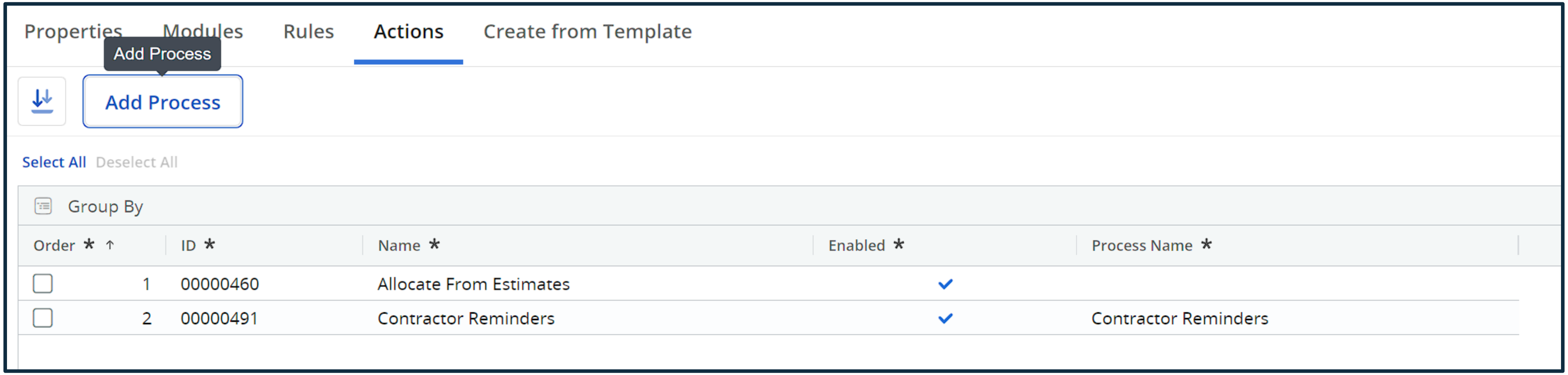




Allows the administrator to apply conditional logic to forcibly require certain set of fields painted in a layout

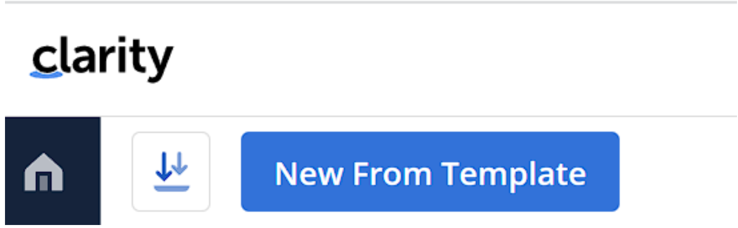
Actions

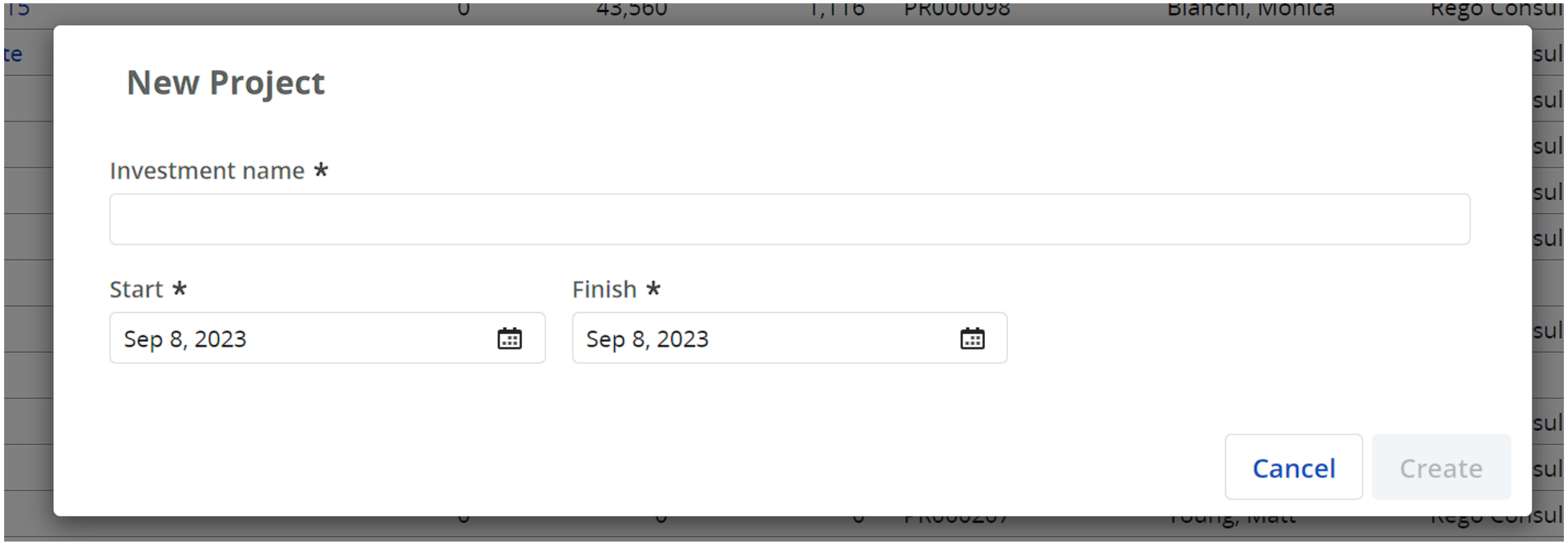
- Actions allow a user to kick off a process on demand
- Security can be applied to blueprint rules to show or hide an action based on user’s access group
- Processes can be specific to the object OR non-object associated processes



Create from Template

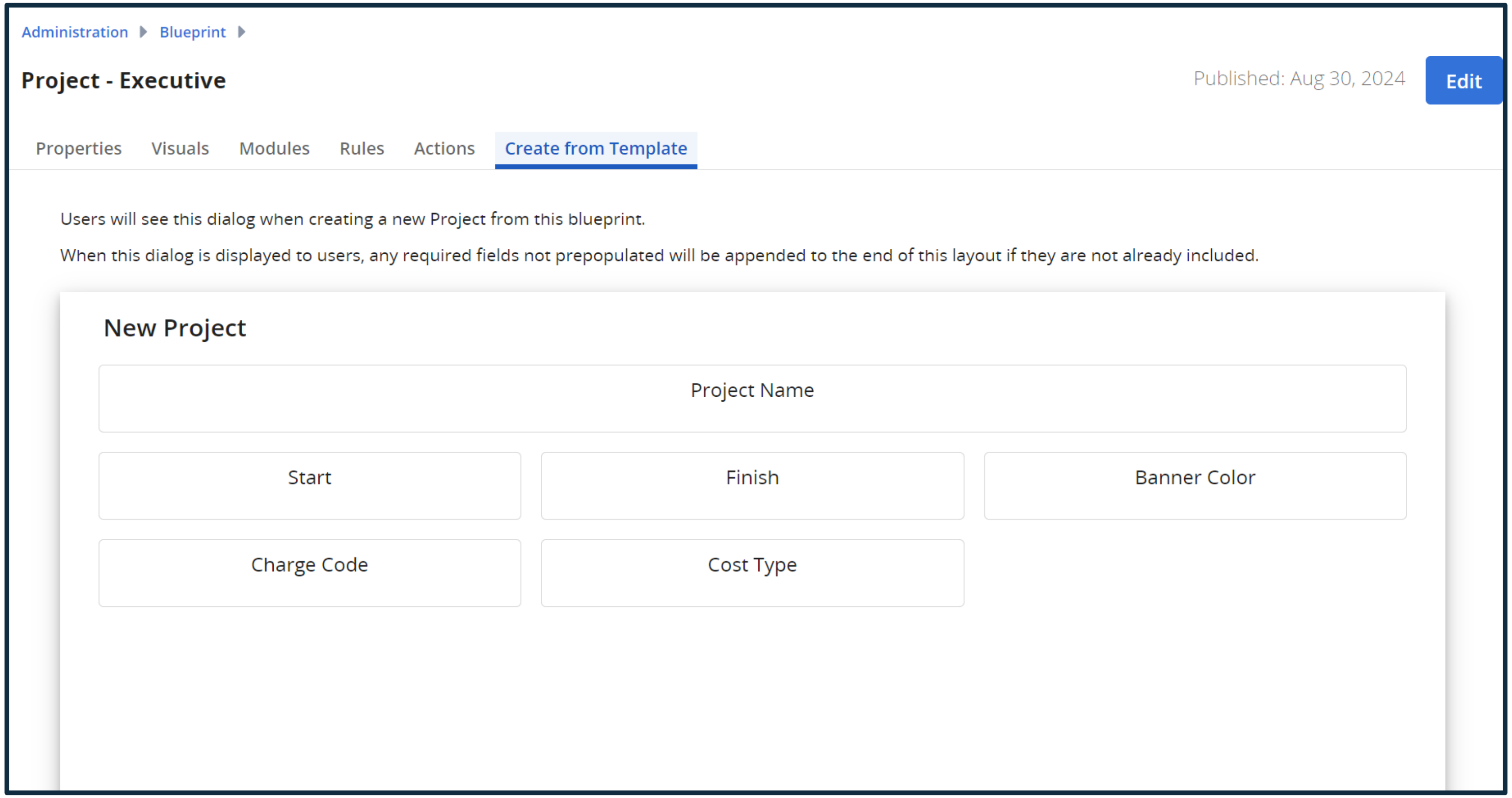
Create from Template defines the Properties View when using Templates. This will allow for required attributes and additional attributes to be prompted to end users.





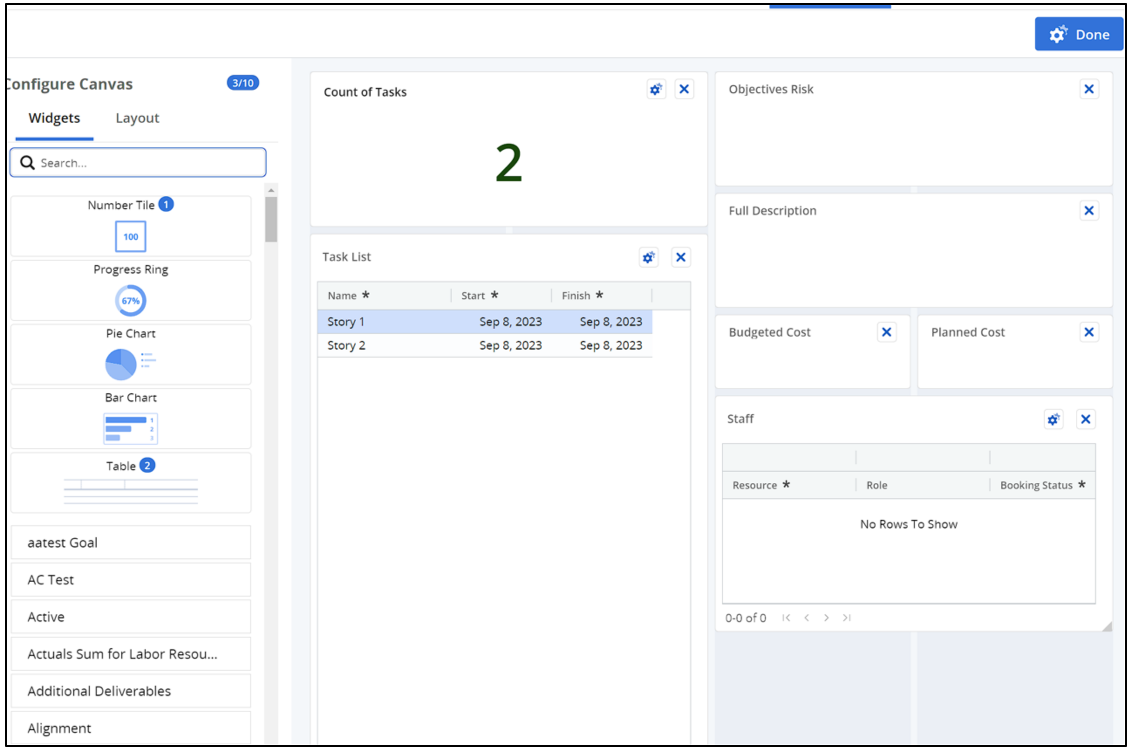
Customize Create from Template Blueprint

- The admin can customize the blueprint on the New From Template module in the blueprint associated to the Template
- Help Text can be added to the Create from Template module
- Sections cannot be added in the layout.



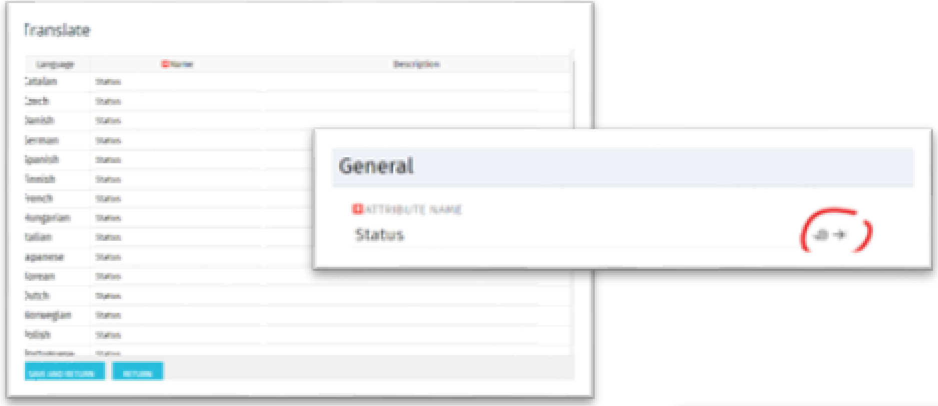
Canvas

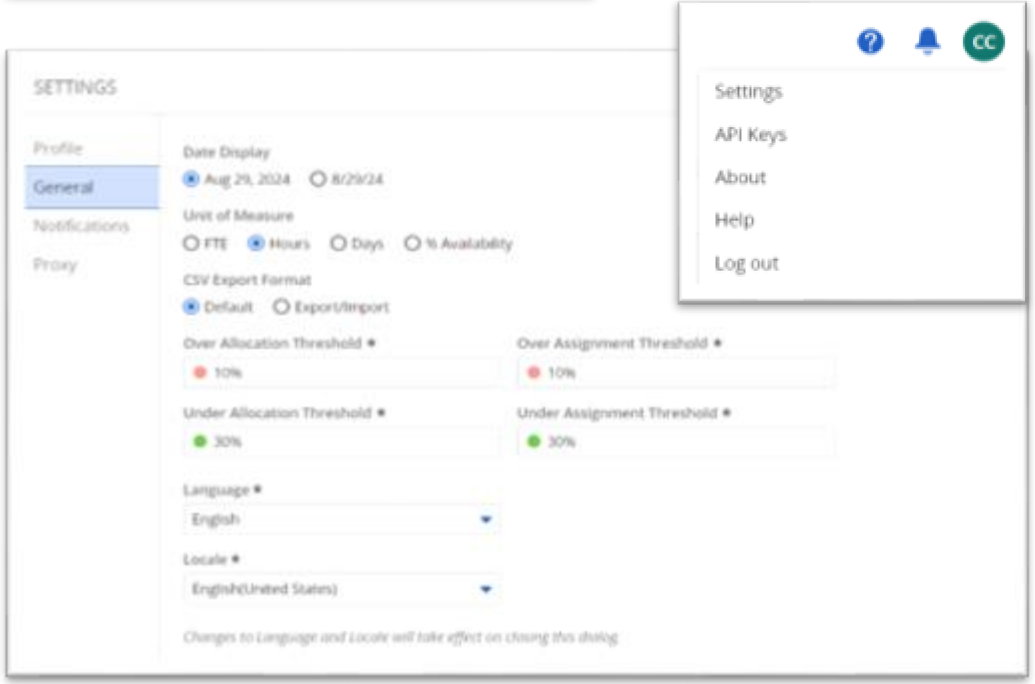
- Introduced in 16.1.0 (previously used for Status Reports only), the canvas. functionality allows you to create a new module that can be configured with fields from the master and sub objects
- Canvas allow grids, fields and widgets to provide Dashboard like experience to end users
- Canvas has 3 different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



Multilingual Translations

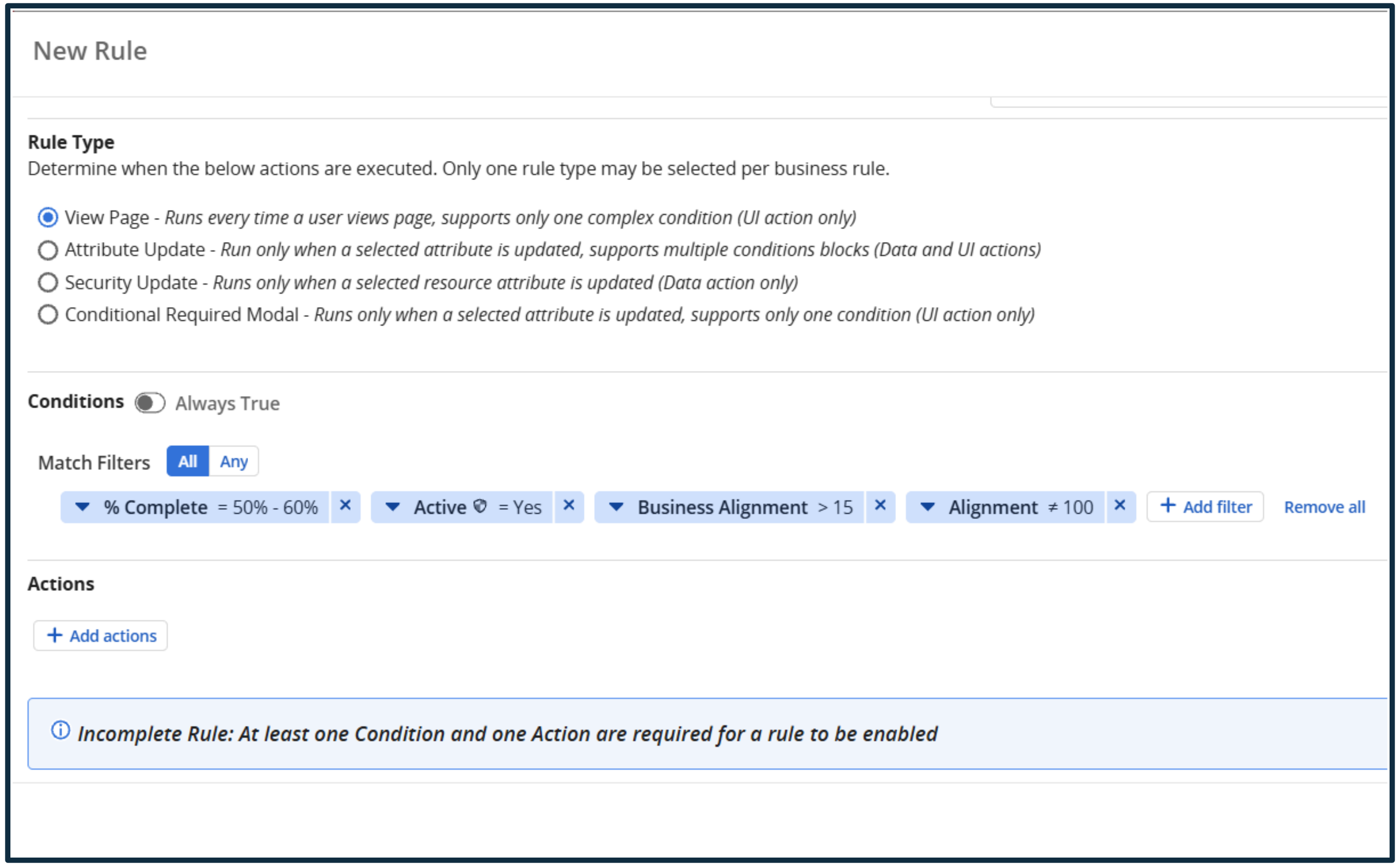
- Attribute translations can be configured in Studio (Classic UI)
  - All languages configurable in one place
  - Applies to attributes in both Classic and MUX
- All MUX translatable elements must be configured by switching languages for the logged-in user. This applies to:
  - Field Labels (Attribute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





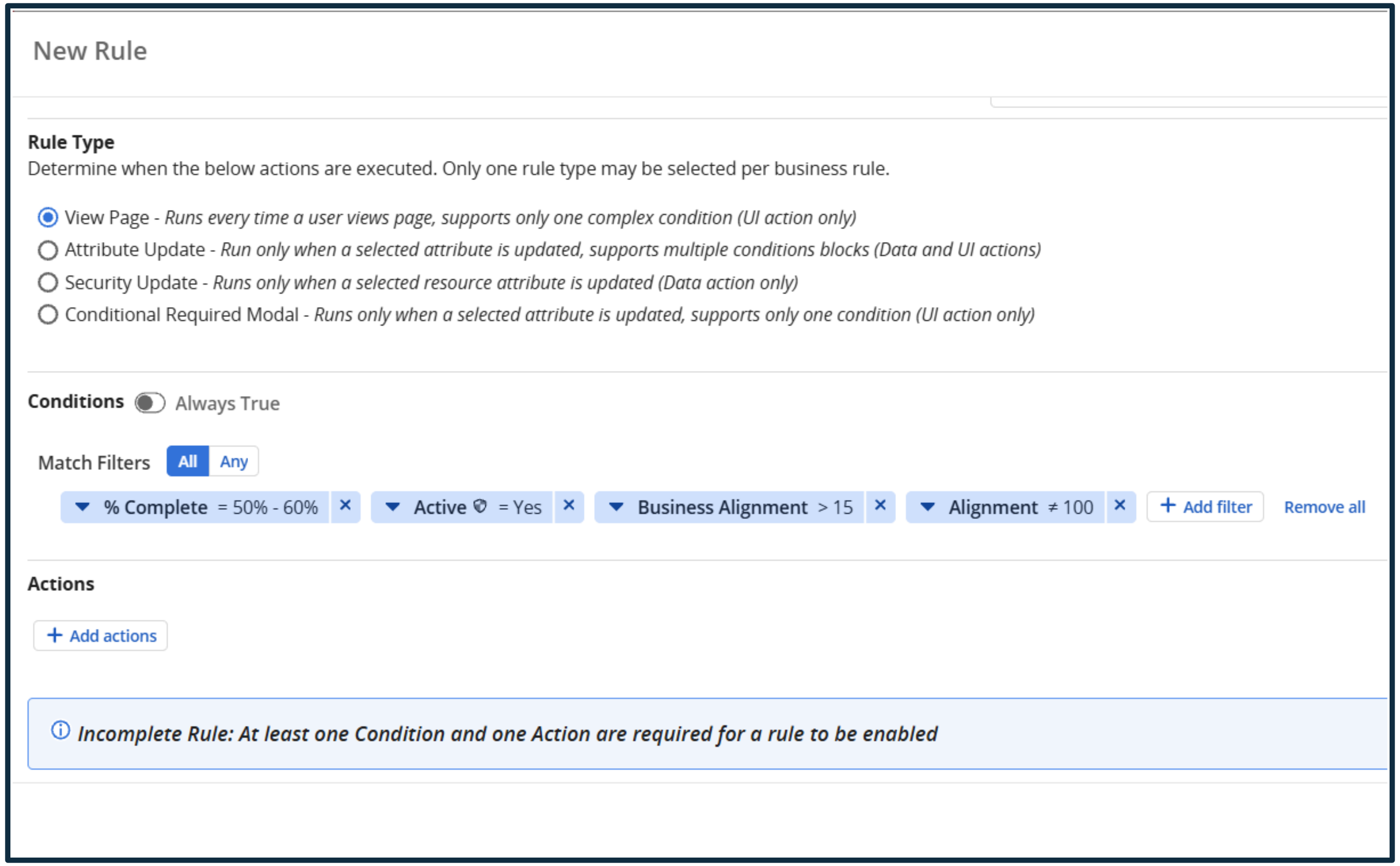
How to Create a Rule

- 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.



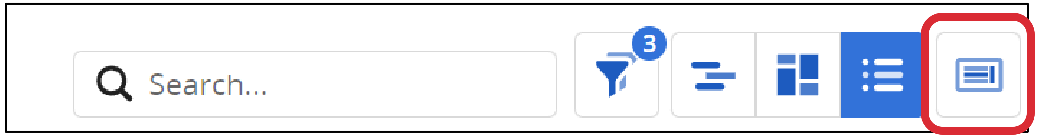
How to Create a Rule

- Fill out the following:
  - 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

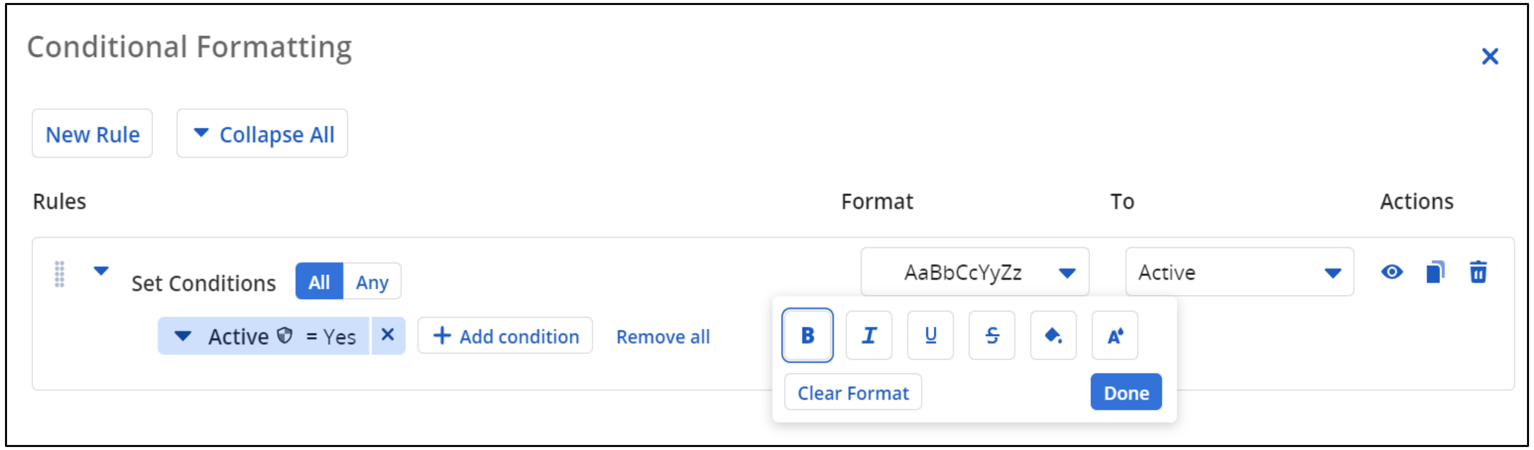


Conditional Formatting

- 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

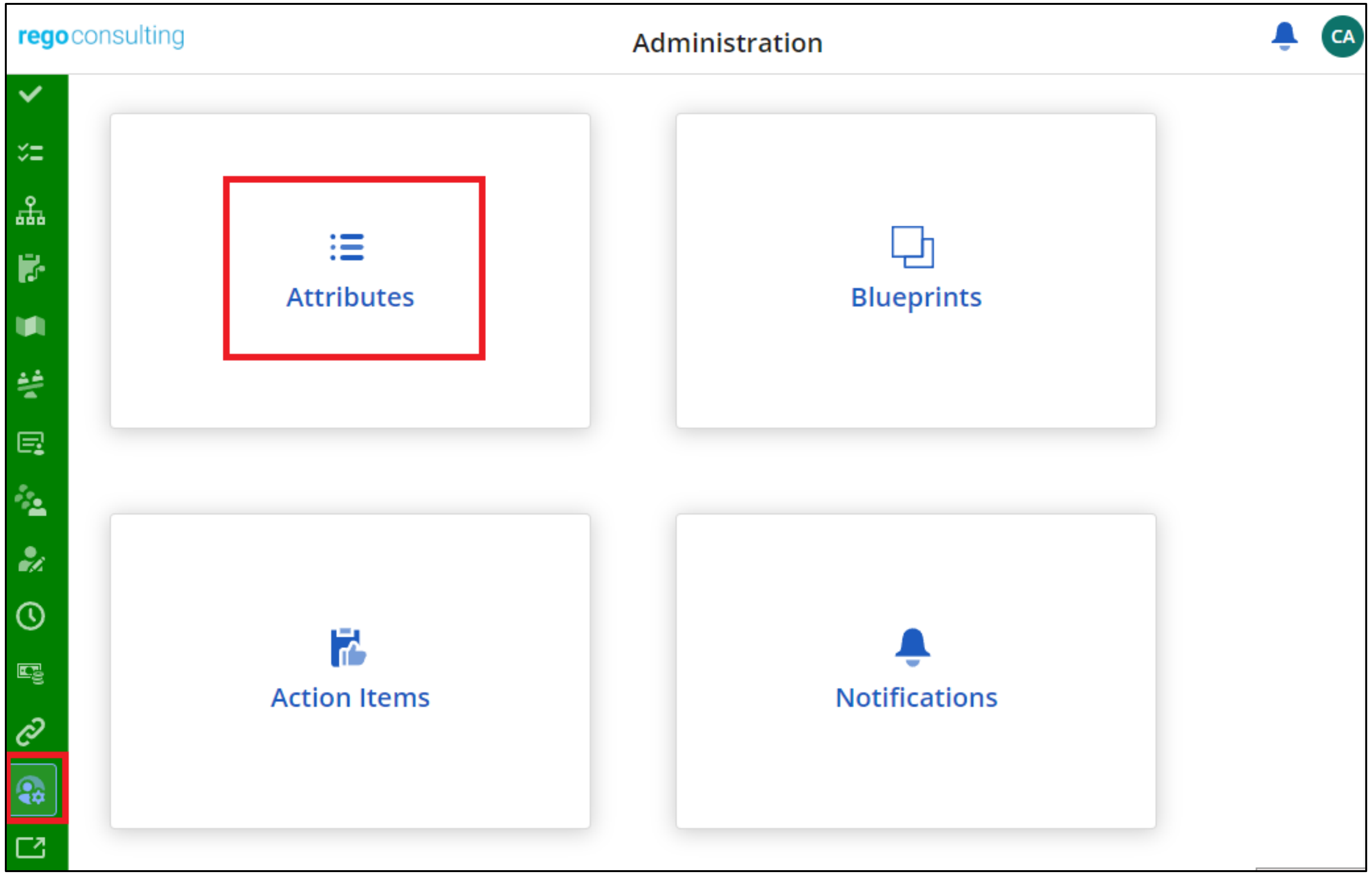


- To: What column should be affected by the formatting

Attribute Administration

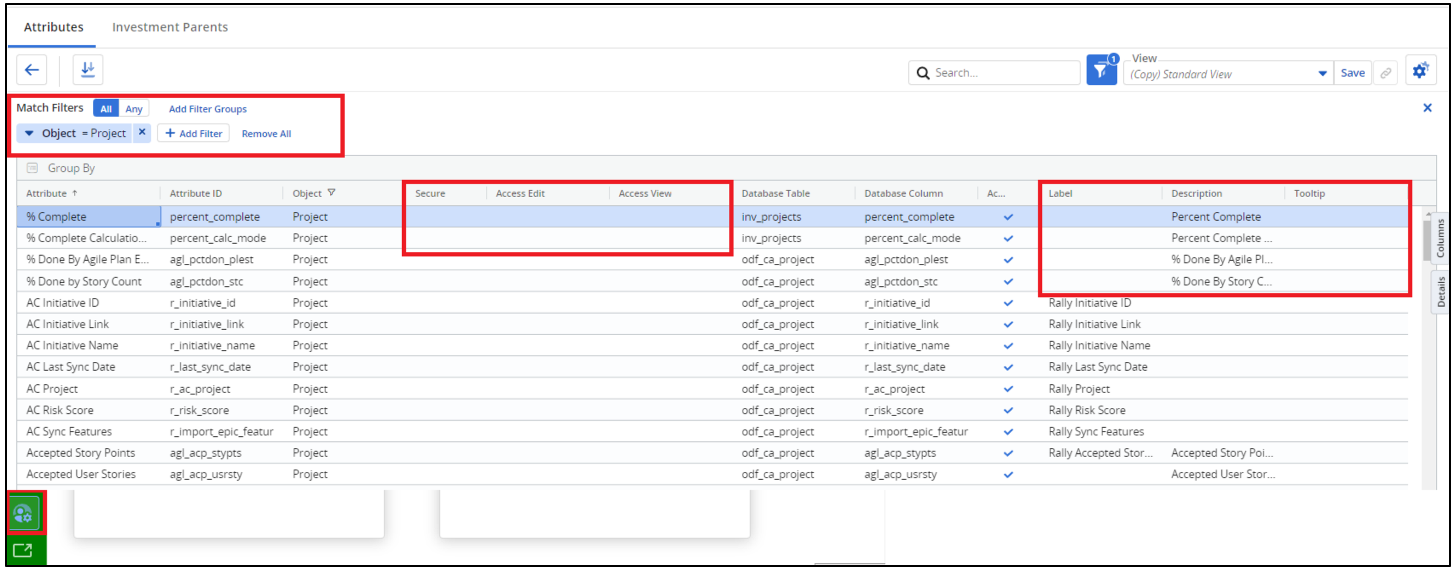
Attributes

- Attributes admin module, allows admins to:
  - Use as an 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 Display Types (typically for calculated attributes)
  - Configure Investment Parents to manage the “parent” field



Attributes

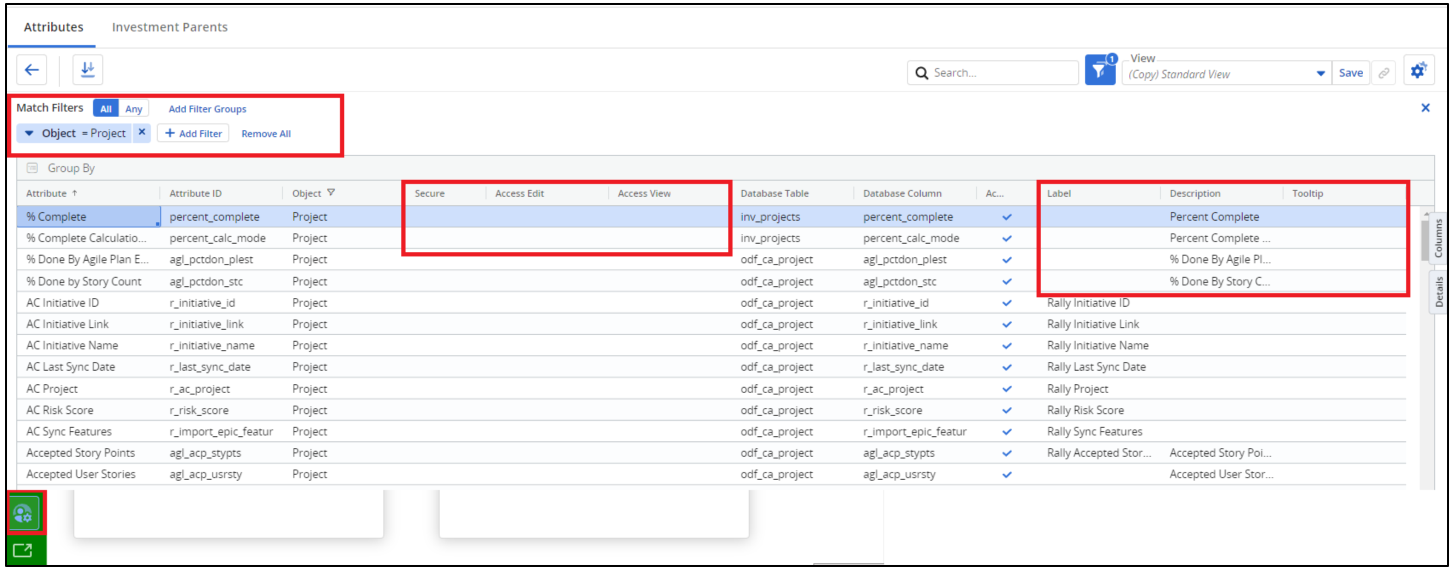
- To configure Field Level Security (FLS now changed to ALS), admins will need to:
  - Enable the Secure checkbox for a given attribute
  - Select the security group for Edit and View access
  - Take into account, this also impacts the API



- Common mistakes while configuring ALS
  - Securing the attribute and not providing Access – Edit and Access – View makes the attribute invisible in MUX except for Administration – Attributes section
  - Not securing the attribute and providing the Access – Edit and/or Access – View does not secure the attribute in MUX

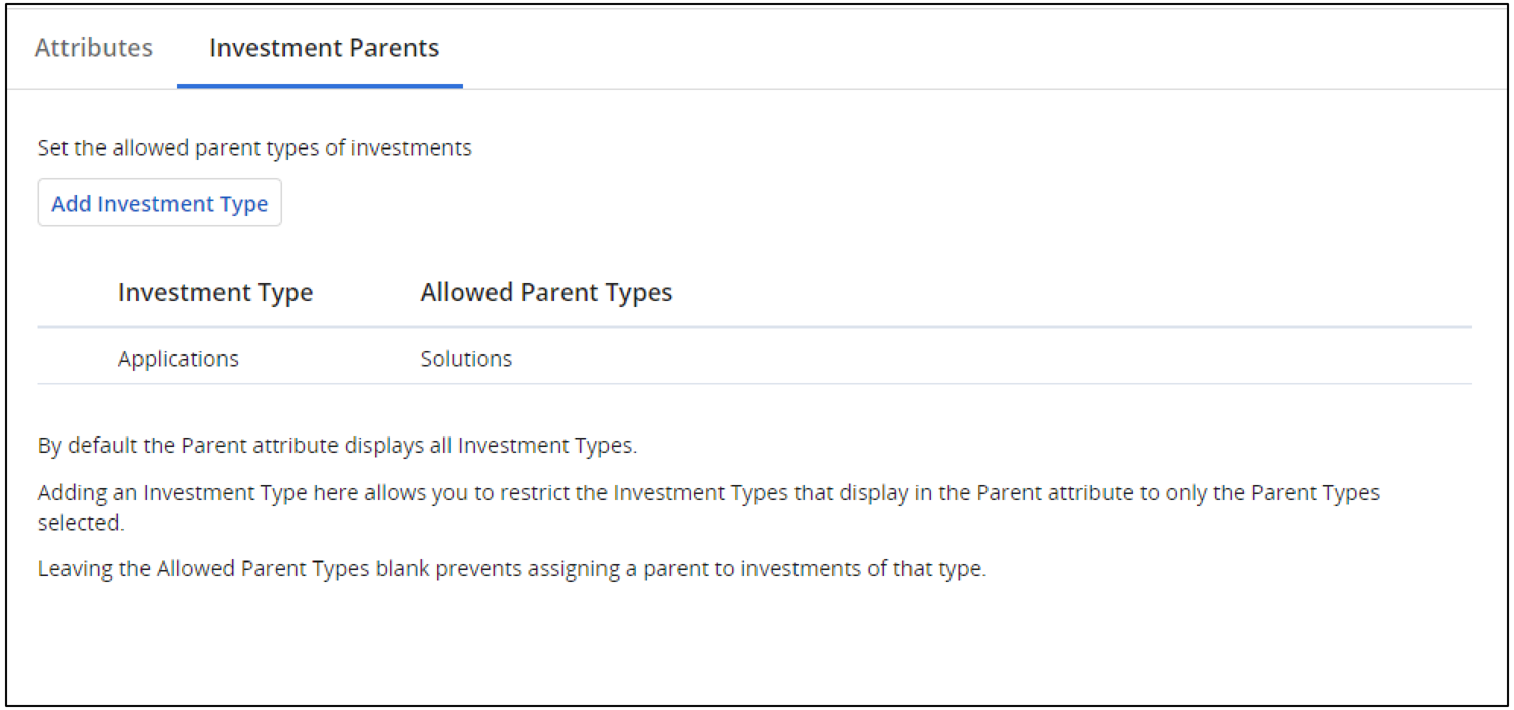
Attributes

- 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



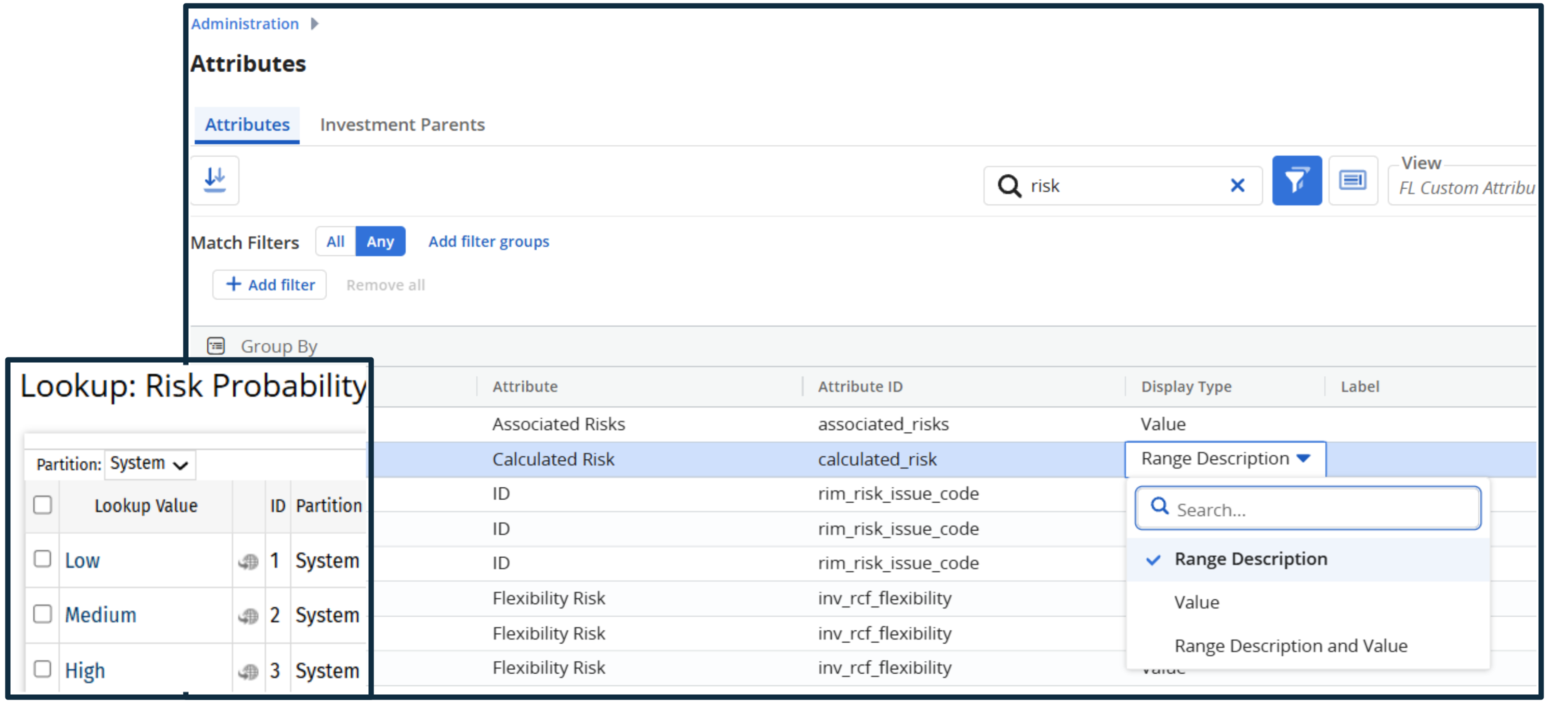
Attributes

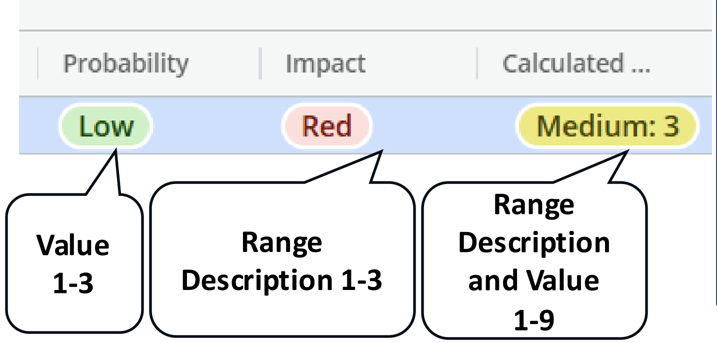
- Introduced in 16.1.2, admins can also configure Parent/Child relationships for the parent field by associating two investment types
- By doing this, end users will only be able to select a parent with the type matching the allowed parents

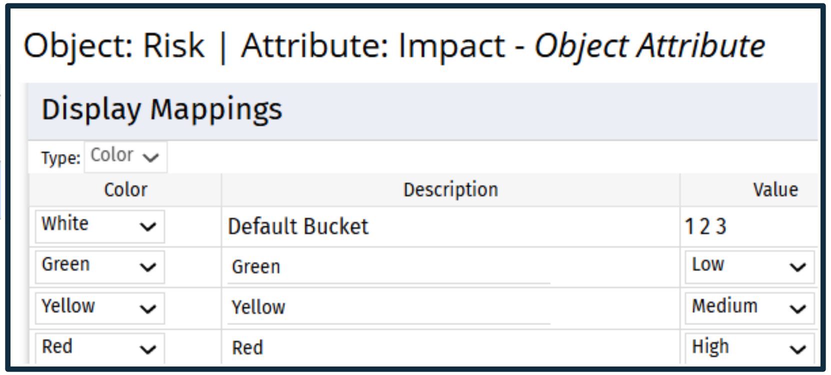


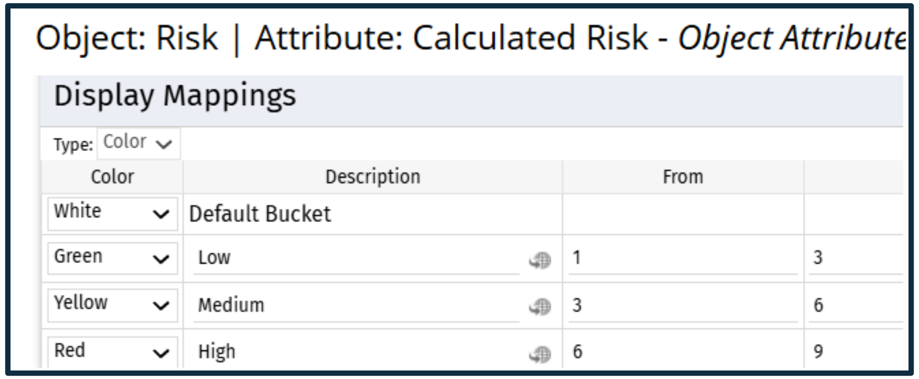
Display Type Updates

- Typically updated for calculated fields like Calculated Risk
- The display type can be changed to
  - Range Description
  - Value
  - Range Description and Value









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

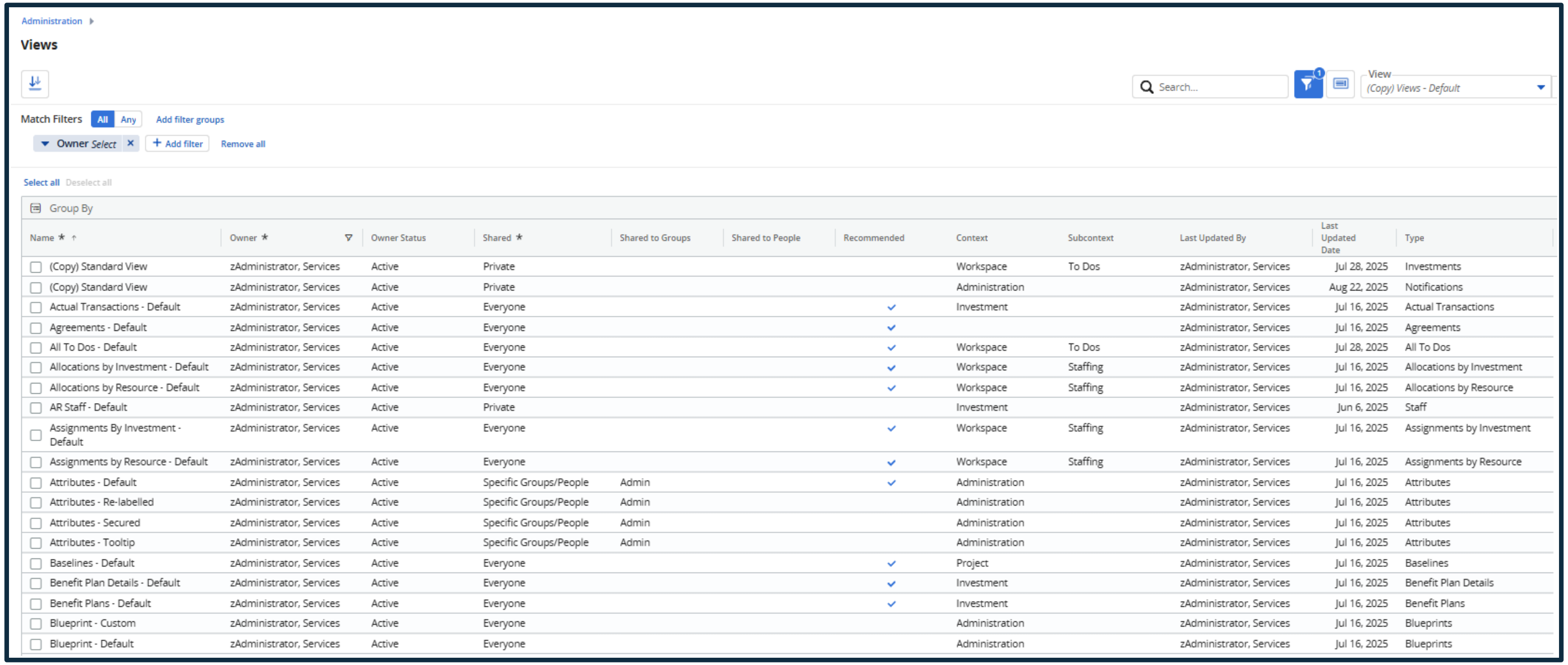
- This is also helpful to add the changes to alternative languages as doing so for Labels in the Modern UX is not administrative friendly

Enabling Modern UX, Basic Configuration and Navigation

Views, Auditing, Timesheet Rules, Action Items, and Notifications

Views Administration

- For administering views in the system
  - Identifying the views in the system
  - Change the owner of view(s)



Administration ▸

Views

View: (Copy) Views - Default

Match Filters All Any Add filter groups

Owner Select × + Add filter Remove all

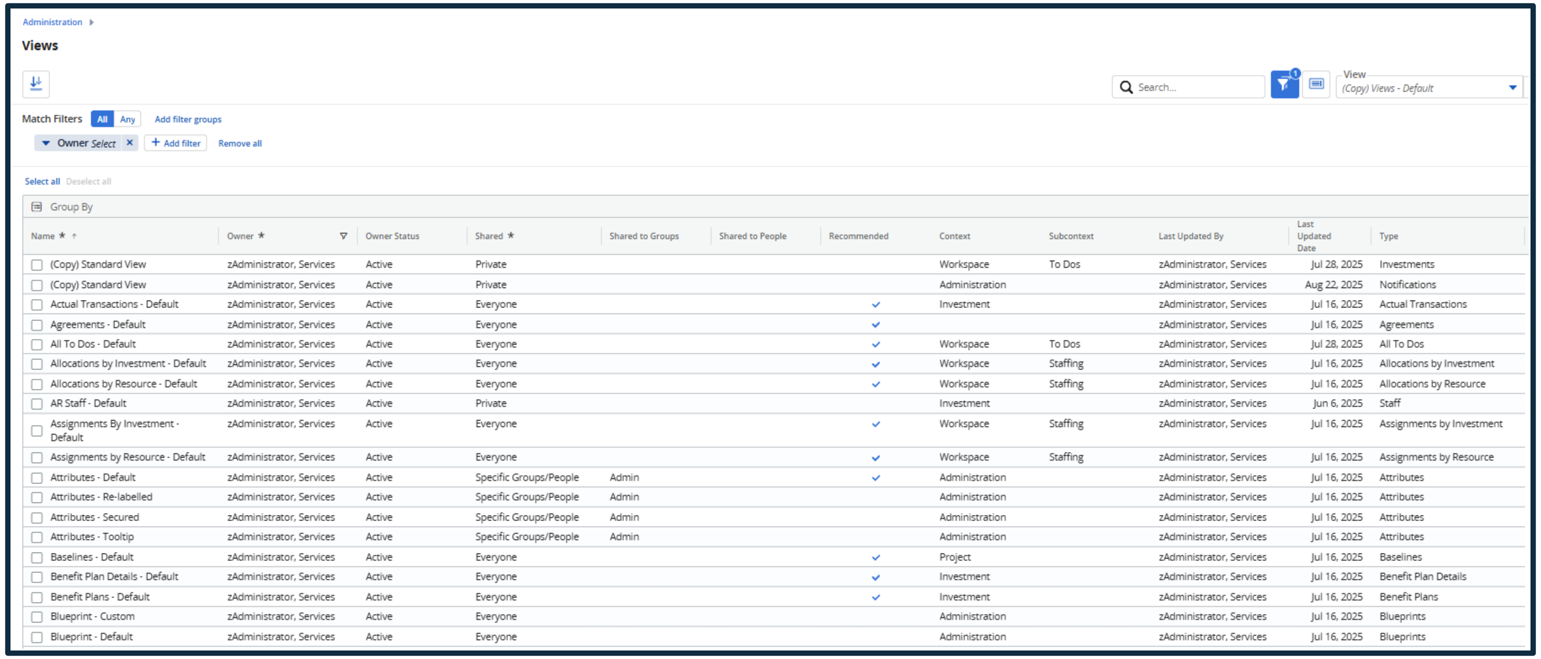
Select all Deselect all

Group By

Name	Owner	Owner Status	Shared	Shared to Groups	Shared to People	Recommended	Context	Subcontext	Last Updated By	Last Updated Date	Type
(Copy) Standard View	zAdministrator, Services	Active	Private				Workspace	To Dos	zAdministrator, Services	Jul 28, 2025	Investments
(Copy) Standard View	zAdministrator, Services	Active	Private				Administration		zAdministrator, Services	Aug 22, 2025	Notifications
Actual Transactions - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Actual Transactions
Agreements - Default	zAdministrator, Services	Active	Everyone			✓			zAdministrator, Services	Jul 16, 2025	Agreements
All To Dos - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	To Dos	zAdministrator, Services	Jul 28, 2025	All To Dos
Allocations by Investment - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Allocations by Investment
Allocations by Resource - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Allocations by Resource
AR Staff - Default	zAdministrator, Services	Active	Private				Investment		zAdministrator, Services	Jun 6, 2025	Staff
Assignments By Investment - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Assignments by Investment
Assignments by Resource - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Assignments by Resource
Attributes - Default	zAdministrator, Services	Active	Specific Groups/People	Admin		✓	Administration		zAdministrator, Services	Jul 16, 2025	Attributes
Attributes - Re-labelled	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
Attributes - Secured	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
Attributes - Tooltip	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
Baselines - Default	zAdministrator, Services	Active	Everyone			✓	Project		zAdministrator, Services	Jul 16, 2025	Baselines
Benefit Plan Details - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Benefit Plan Details
Benefit Plans - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Benefit Plans
Blueprint - Custom	zAdministrator, Services	Active	Everyone				Administration		zAdministrator, Services	Jul 16, 2025	Blueprints
Blueprint - Default	zAdministrator, Services	Active	Everyone				Administration		zAdministrator, Services	Jul 16, 2025	Blueprints

Views Administration

- Change the Share options of a view
  - Private
  - Specific Groups/People
    - Add / Modify / Remove the groups / people shared with
  - Everyone



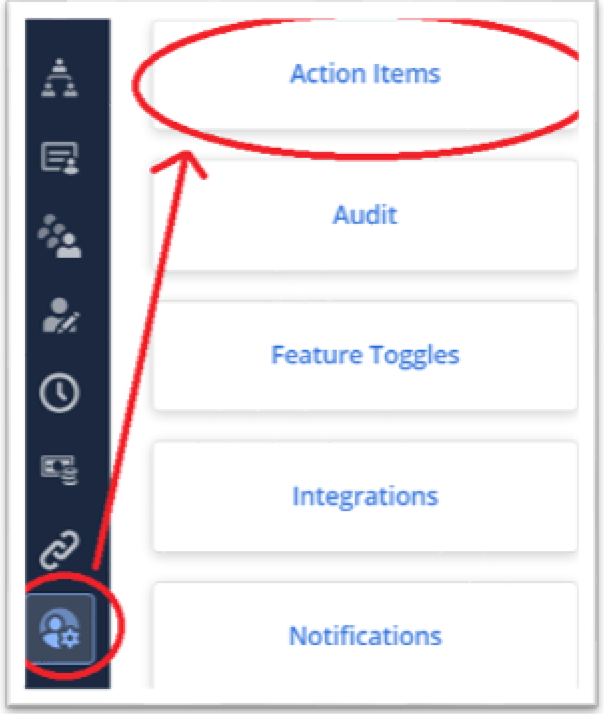
Name	Owner	Owner Status	Shared	Shared to Groups	Shared to People	Recommended	Context	Subcontext	Last Updated By	Last Updated Date	Type
(Copy) Standard View	zAdministrator, Services	Active	Private				Workspace	To Dos	zAdministrator, Services	Jul 28, 2025	Investments
(Copy) Standard View	zAdministrator, Services	Active	Private				Administration		zAdministrator, Services	Aug 22, 2025	Notifications
Actual Transactions - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Actual Transactions
Agreements - Default	zAdministrator, Services	Active	Everyone			✓			zAdministrator, Services	Jul 16, 2025	Agreements
All To Dos - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	To Dos	zAdministrator, Services	Jul 28, 2025	All To Dos
Allocations by Investment - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Allocations by Investment
Allocations by Resource - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Allocations by Resource
AR Staff - Default	zAdministrator, Services	Active	Private				Investment		zAdministrator, Services	Jun 6, 2025	Staff
Assignments By Investment - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Assignments by Investment
Assignments by Resource - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Assignments by Resource
Attributes - Default	zAdministrator, Services	Active	Specific Groups/People	Admin		✓	Administration		zAdministrator, Services	Jul 16, 2025	Attributes
Attributes - Re-labelled	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
Attributes - Secured	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
Attributes - Tooltip	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
Baselines - Default	zAdministrator, Services	Active	Everyone			✓	Project		zAdministrator, Services	Jul 16, 2025	Baselines
Benefit Plan Details - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Benefit Plan Details
Benefit Plans - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Benefit Plans
Blueprint - Custom	zAdministrator, Services	Active	Everyone				Administration		zAdministrator, Services	Jul 16, 2025	Blueprints
Blueprint - Default	zAdministrator, Services	Active	Everyone				Administration		zAdministrator, Services	Jul 16, 2025	Blueprints

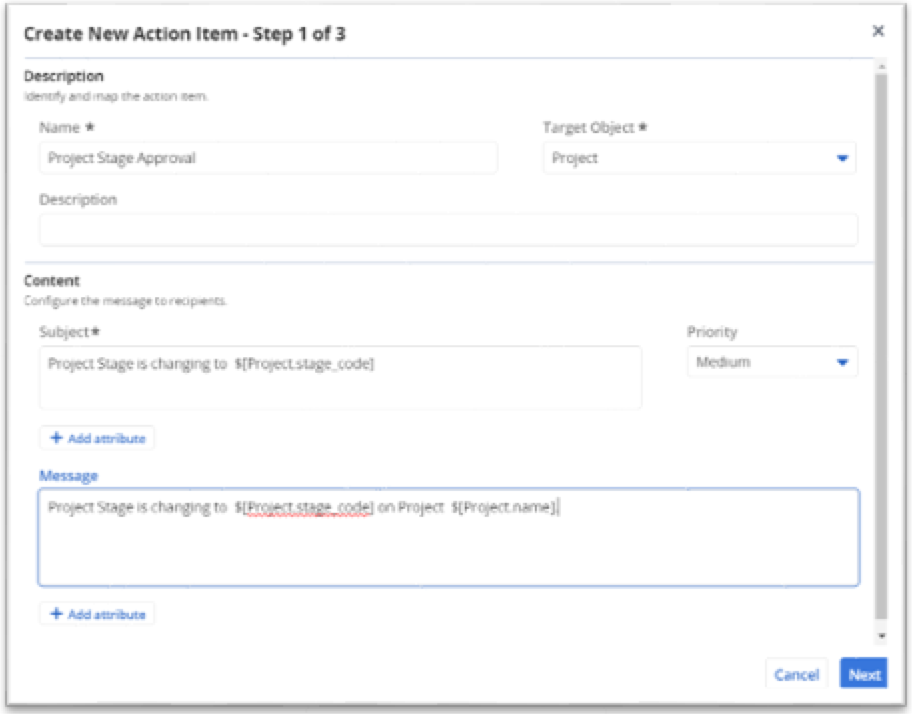
- Change whether a view is “recommended”

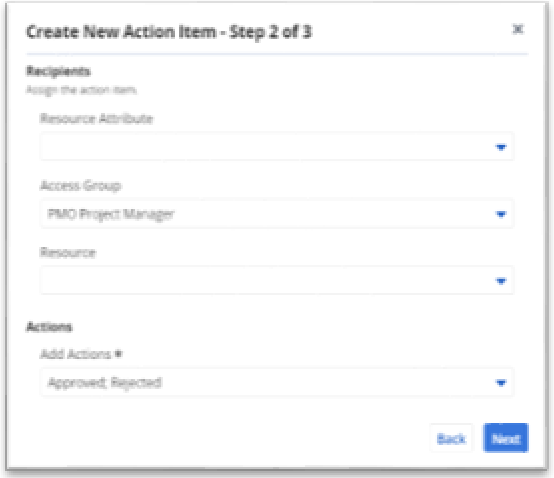
Action Items and Notifications

Step 1: Define an Action Item

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



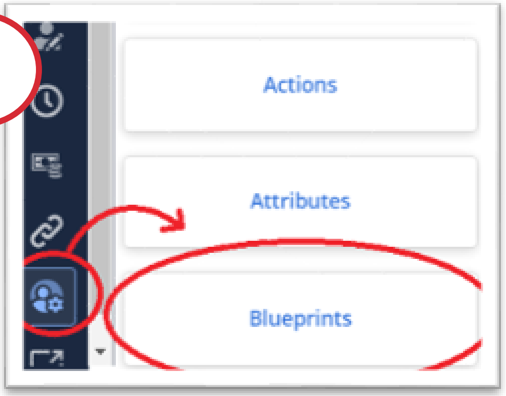




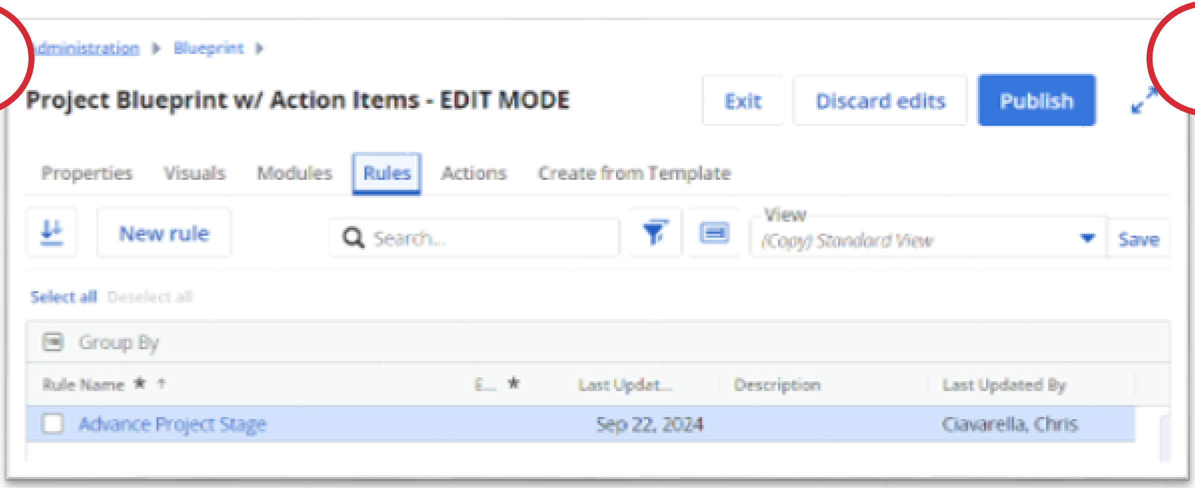
Action Items and Notifications

Step 2: Define an Action Item Trigger

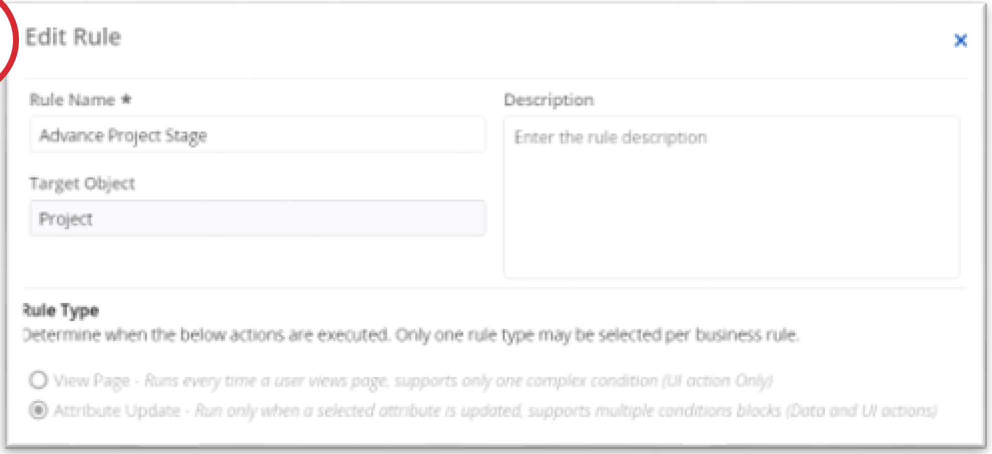
1



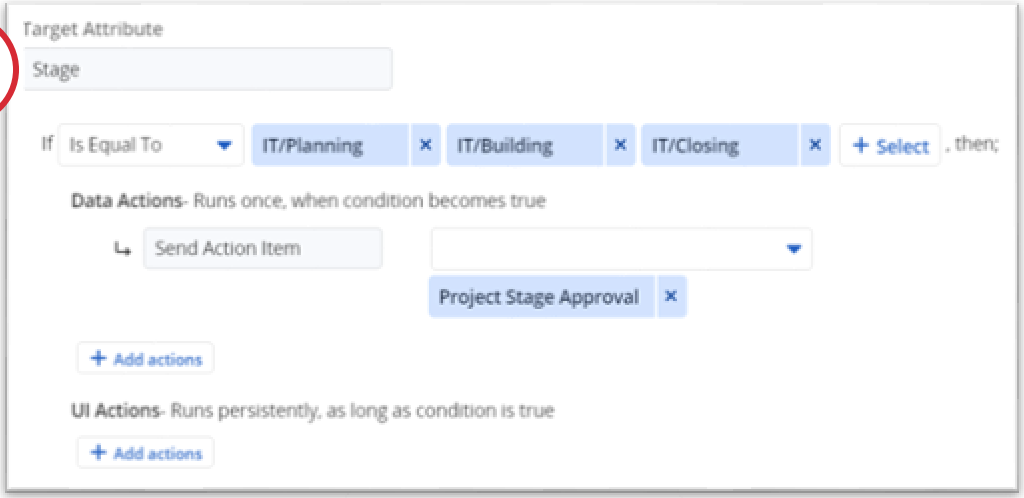
2



3

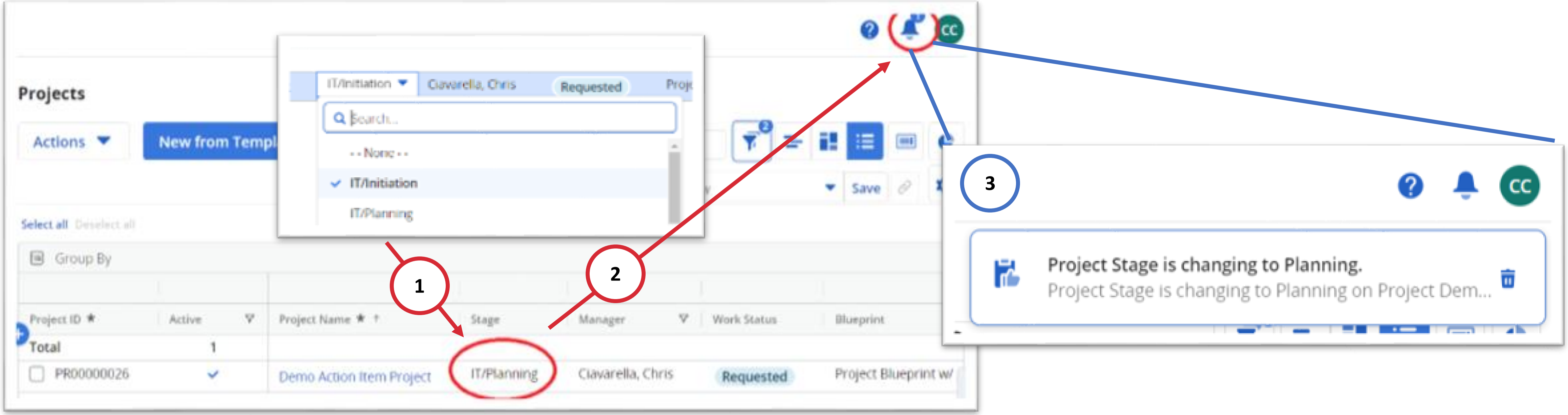


4



Action Items and Notifications

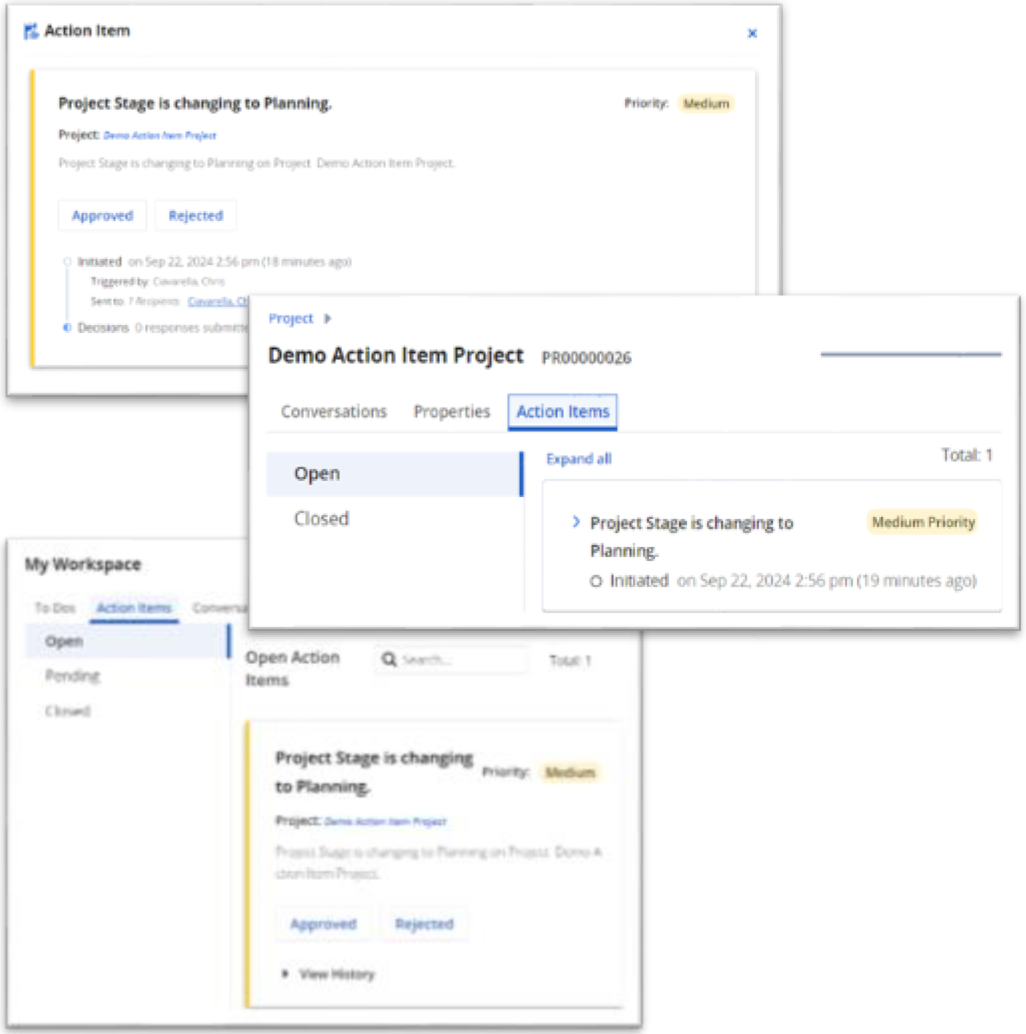
Step 3: Trigger an Action Item



Action Items and Notifications

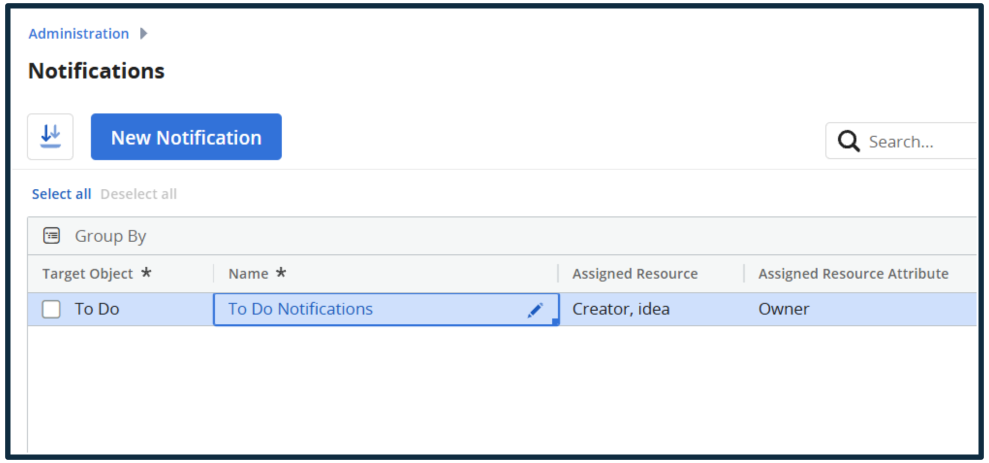
Step 4: Respond to an Action Item

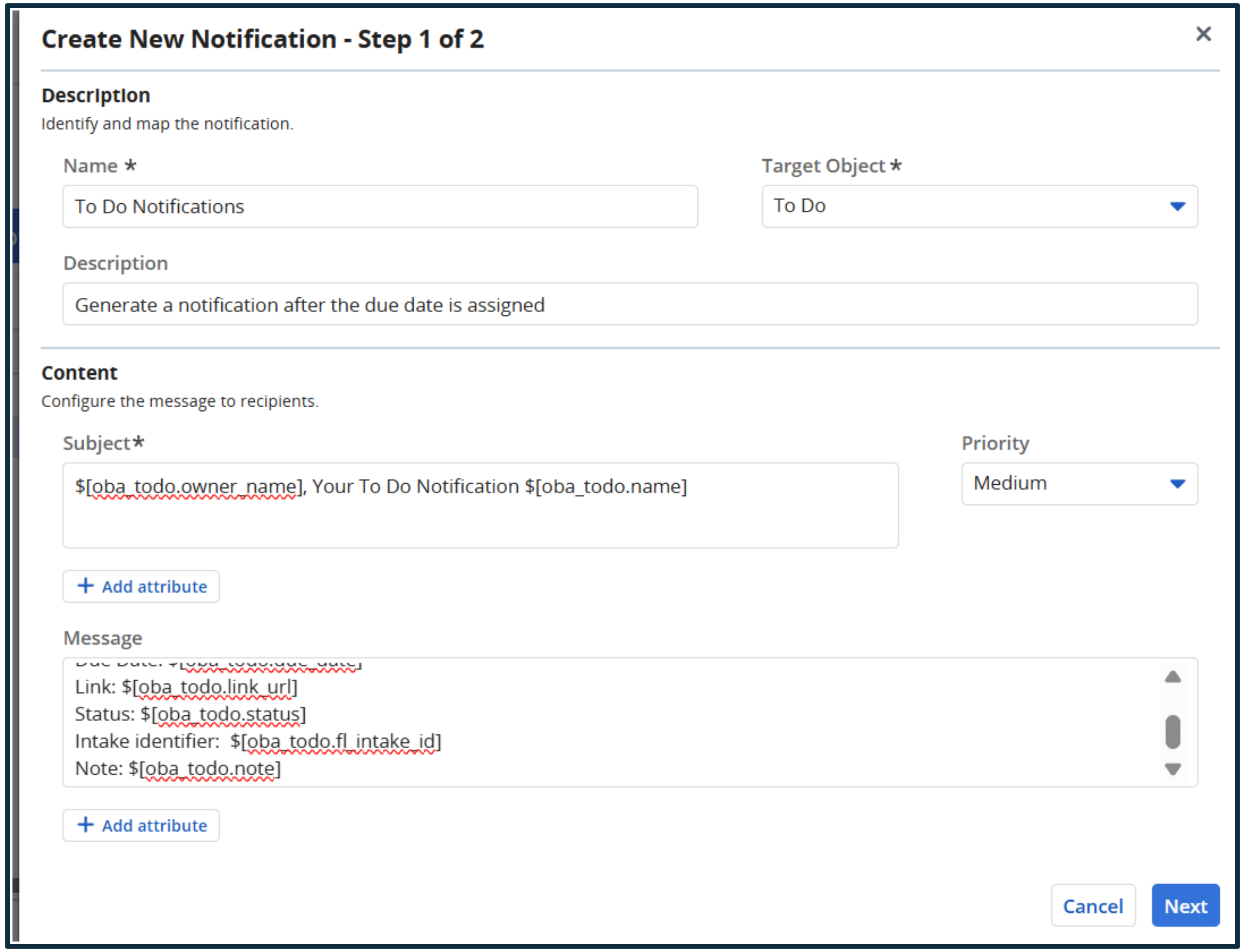
- Action Item assignees can respond to their Action Items in the following ways:
    1. Notifications area in the page header.
    2. Action Items module on a Blueprint
    3. Action Items table widget on a Page Canvas
    4. My Workspace area of the MUX
    5. Mobile app
    6. E-mail (OOTB or Rego AIR)



Notifications

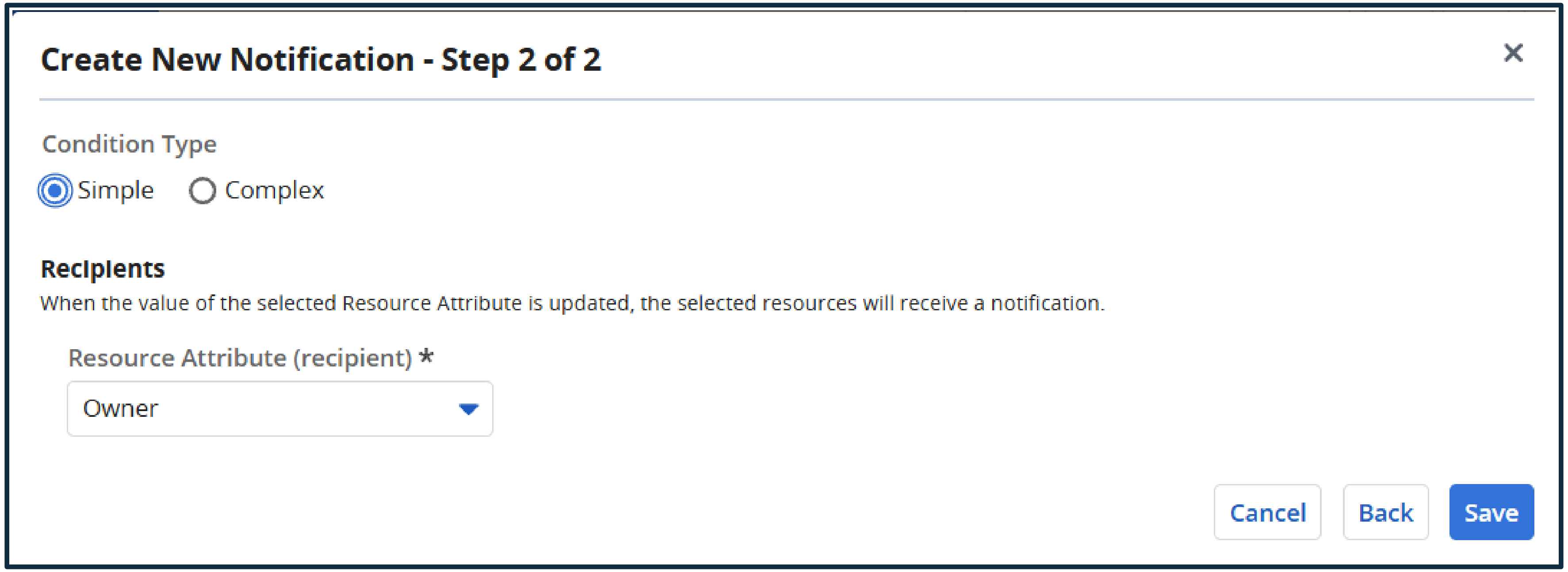
- To generate email notifications on update of a specific attribute
- Two types of notification
  - Simple
  - Complex



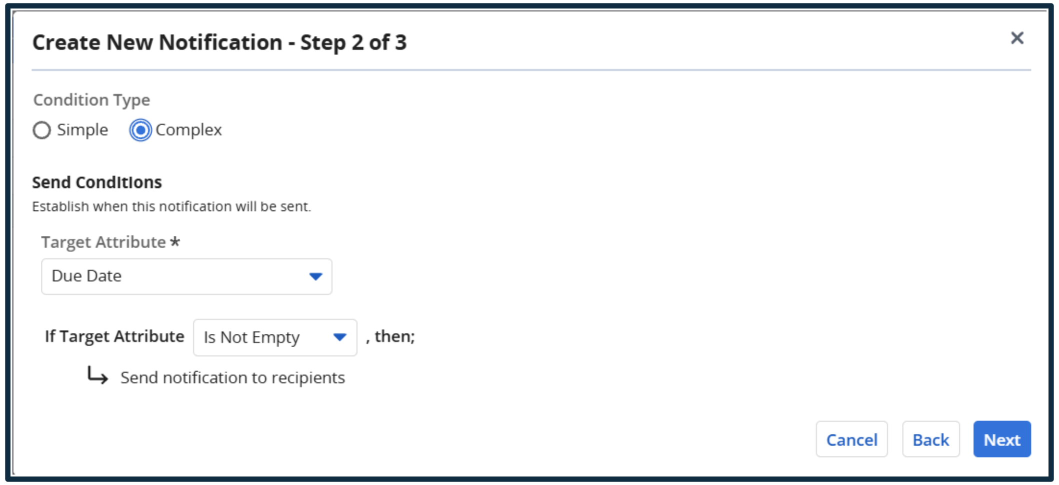


Simple Notifications

- This sends the notification to the new resource, when the value of a selected resource attribute is changed.



Complex Notifications

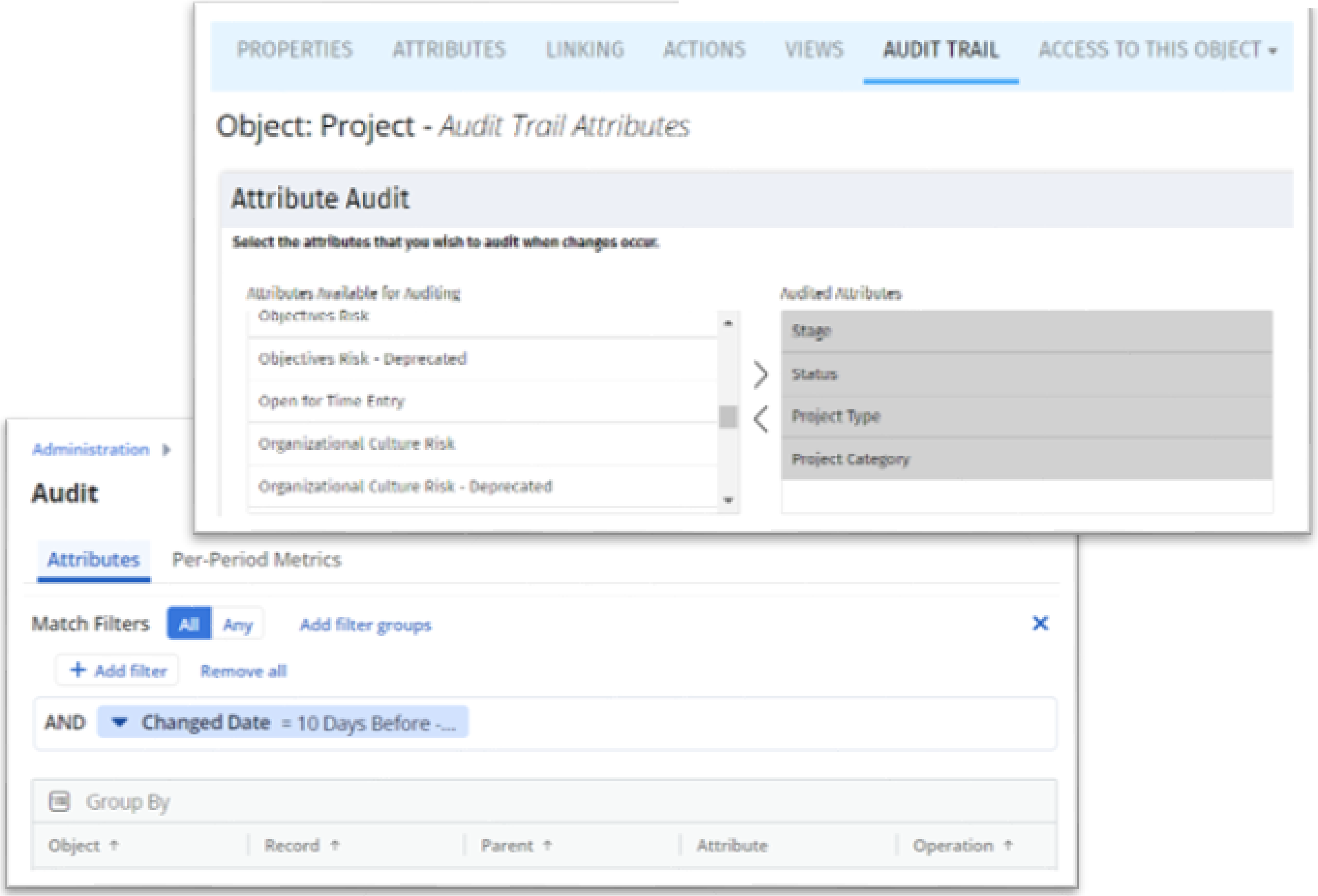


In a complex notification, you can set a condition for an attribute (Example: Due Date is set) based upon which the notification is sent to either a resource attribute in the record, or a specific set of resources or a specific set of access groups or a combination of the above three sets.

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

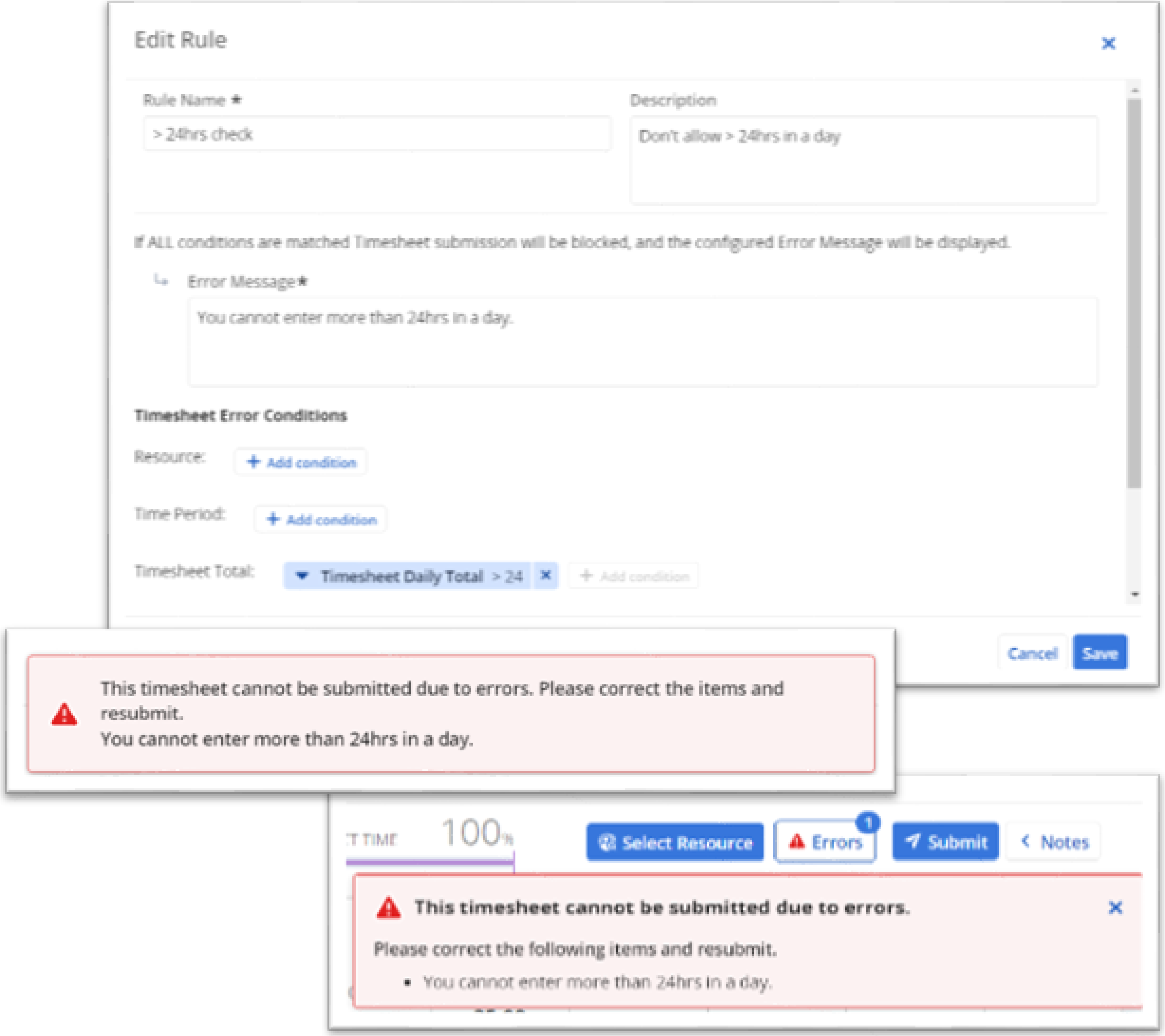
Classic UI – Object Administration



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)



Actions

- Actions in Administration allows you to manage/administer controls over:
  - Importing data from CSV into investments and custom objects
  - Which security groups can share the views they created with everyone(all), with specific security groups or specific resources
  - Who has access to Classic PPM
  - From 16.3.3, you can also control access to Classic PPM

Administration

Actions

View (Copy) Standard

Group By

Action	Type	Enabled	Secure	Access	Description
Import from CSV	Team Investment	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Financial Metrics	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	ResourceLoader	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Connection Manager	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Data Processor	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Idea	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Project	✓			Allows Import from CSV for the object in the 'Type' field
Views - Share with Everyone	All	✓			Ability to share your views with everyone
Import from CSV	itd Advanced Resource Planning View	✓			Allows Import from CSV for the object in the 'Type' field
Views - Share with People	All				Ability to share your views with people to which you have view access
Views - Share with Groups	All				Ability to share your views with any groups enabled for sharing
Import from CSV	Skill	✓			Allows Import from CSV for the object in the 'Type' field
Staffing Scenarios - Share with People	Staffing	✓			Ability to share your staffing scenarios with people to which you have view access
Staffing Scenarios - Share with Groups	Staffing	✓			Ability to share your staffing scenarios with any groups enabled for sharing
Send to Rally	Roadmap				Allows creation of Portfolio Items in Rally directly from a Scenario of 'In Plan' Roadmap Items for a Clarity Roadmap with an Integration Mapping
Global Search	All				Allows Global Search box to appear for searching attributes across objects that are 'Enabled for Search' in the Attributes grid and requires running the 'Global Search Sync' job.
Classic PPM Access	All	✓			Allows access to Classic PPM via URL

Actions

Although the name is similar ...

- It is different from the Actions module you see in the Blueprints (which refers to the processes accessible in MUX)

- It is different from the UI Actions and Data Actions that you set in the Blueprint business rules

Administration ▸

Actions

View (Copy) Standard

Group By

Action *	Type *	Enabled	Secure	Access	Description
Import from CSV	Team Investment	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Financial Metrics	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	ResourceLoader	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Connection Manager	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Data Processor	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Idea	✓			Allows Import from CSV for the object in the 'Type' field
Import from CSV	Project	✓			Allows Import from CSV for the object in the 'Type' field
Views - Share with Everyone	All	✓			Ability to share your views with everyone
Import from CSV	itd Advanced Resource Planning View	✓			Allows Import from CSV for the object in the 'Type' field
Views - Share with People	All				Ability to share your views with people to which you have view access
Views - Share with Groups	All				Ability to share your views with any groups enabled for sharing
Import from CSV	Skill	✓			Allows Import from CSV for the object in the 'Type' field
Staffing Scenarios - Share with People	Staffing	✓			Ability to share your staffing scenarios with people to which you have view access
Staffing Scenarios - Share with Groups	Staffing	✓			Ability to share your staffing scenarios with any groups enabled for sharing
Send to Rally	Roadmap				Allows creation of Portfolio Items in Rally directly from a Scenario of 'In Plan' Roadmap Items for a Clarity Roadmap with an Integration Mapping
Global Search	All				Allows Global Search box to appear for searching attributes across objects that are 'Enabled for Search' in the Attributes grid and requires running the 'Global Search Sync' job.
Classic PPM Access	All	✓			Allows access to Classic PPM via URL

Feature Toggles

- Feature Toggles allows you to turn recently introduced features on or off
  - Gives an opportunity to review recently introduced features and subsequently turn them on or off
  - These toggles will be available in administration for a specified period, after which the feature will be removed
  - In such cases, the functionality will automatically be available for all users in that release

Administration

Feature Toggles

Search...

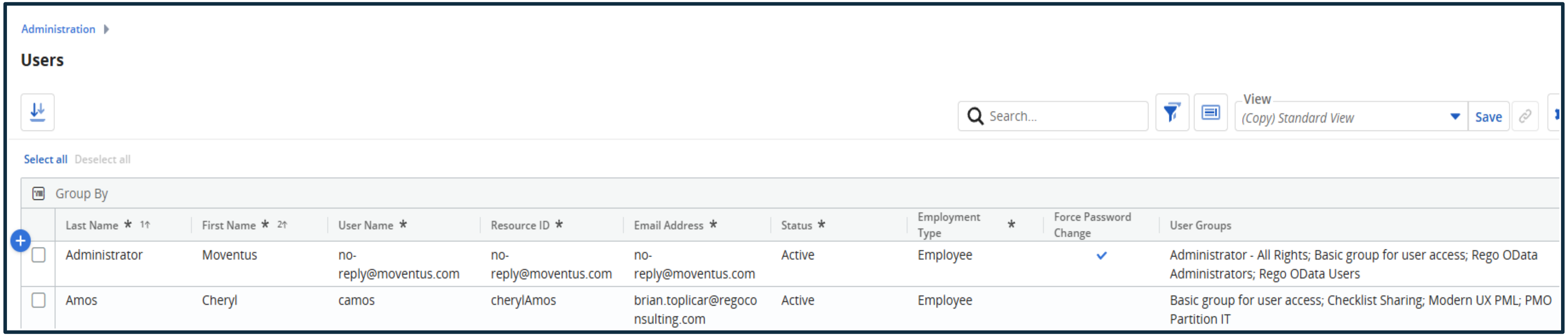
Select all Deselect all

Group By

Name	Description	Introduced In Release	Expires In Release	Enabled
Enable Currency conversion during Roadmap Items Import and Sync	When this feature is enabled, a Currency attribute will be available in Roadmaps. If this Currency attribute has a value, then any money attributes of linked Roadmap Items will be converted to the Roadmap Currency upon the Import and Sync actions on the Roadmap.	16.3.3	16.4.3	✓
Global Header Help Icon for Information Center	When this feature is enabled, an icon is shown in the global header to open the Information Center	16.3.1	16.4.0	✓
Separate Audit into 'Attributes' and 'Per Period Metrics' Tabs	When this feature is enabled, audit information will be separated into two tabs: Attributes and Per-Period Metrics. The saved Views, in place prior to upgrade, will automatically be populated within both of these tabs. If this feature is disabled, the audit information and saved Views will revert to the pre-upgrade state. If the feature is subsequently enabled, audit information will be presented again in two tabs with the corresponding saved Views prior to the feature being disabled. This feature should improve performance; however, if you experience a performance degradation, you should disable this feature and contact Support.	16.2.3	16.4.0	✓
Drop-Down List Column Labels	When this feature is enabled, drop-down lists based on dynamic lookups will display column labels when multiple columns are displayed.	16.2.2	16.4.3	✓
Return Parent Tasks when Filtering on Task Timeline layouts in Investments	When this feature is enabled, Task Timeline filters in Investments will include tasks matching the criteria and also their parent tasks.	16.3.3	16.4.0	✓
Resource Directory: Relationship Explorer Beta	When this feature is enabled, the 'Explore Relationships' action will be available via right-click on cards in the Resource Directory.	16.3.2	16.4.3	✓
Grid 'Columns' panel refresh behavior	When this feature is enabled, the grid data will refresh when the 'Columns'	16.3.0	16.4.0	✓

Users

- User administration can be performed in MUX. Hooray!
- Under Users module of Administration, you can...
  - Add a new user record
    - While you may not be able to add a resource through resource menu, you can add them through the Users administration section and update the resource attributes in Resources navigation menu
  - Update an existing user record
    - Typical updates include status, user groups, email address etc.



Last Name	First Name	User Name	Resource ID	Email Address	Status	Employment Type	Force Password Change	User Groups
Administrator	Moventus	no-reply@moventus.com	no-reply@moventus.com	no-reply@moventus.com	Active	Employee	✓	Administrator - All Rights; Basic group for user access; Rego OData Administrators; Rego OData Users
Amos	Cheryl	camos	cherylAmos	brian.toplicar@regoconsulting.com	Active	Employee		Basic group for user access; Checklist Sharing; Modern UX PML; PMO Partition IT

Things Not Covered

- Staffing – Did not know whether you want to cover administration of various attributes showing up in staffing and the administration of scenarios
- Plans – Attribute administration similar to Staffing. (No scenarios) Probably too much info
- Skills – Nothing much to train really other than pulling into resource record
- Authentication and Keys – Nothing to cover really
- Integrations – Not sure whether you want to cover this or not
- Vaia – Beta

Considerations, Recommendations and Rego's MUX Migrator

Considerations and Recommendations

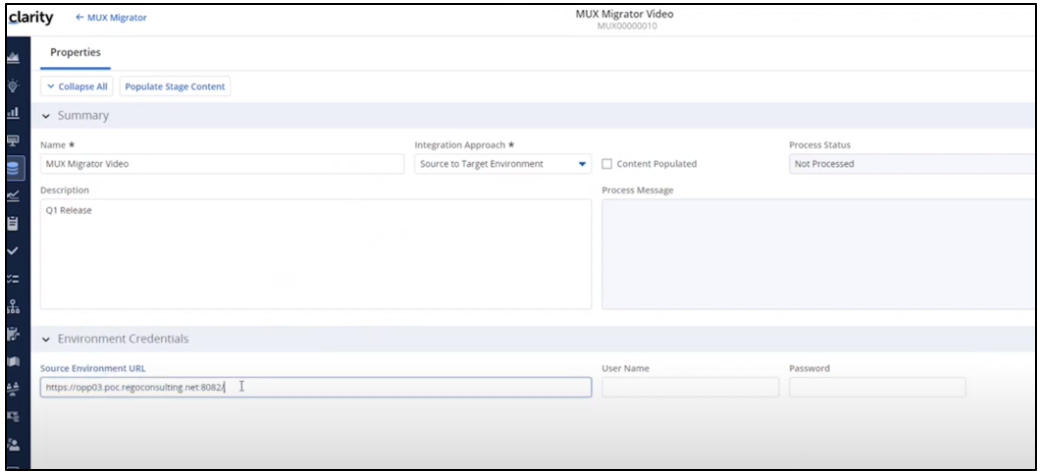
- Align Modern UX with your business process by implementing:
  - Templates for Investment creation
  - Blueprints to match different types of investments
  - Use CITs for other type of investments
- Tailor the experience and security by using:
  - Security Groups, OBS and Access Rights
  - Use Business Rules and Field Level Security (FLS) to show, hide, or protect fields
- Remember Modern UX is highly customizable by end users, they will be able to create their own: Views, Minor settings, Picklists, etc.

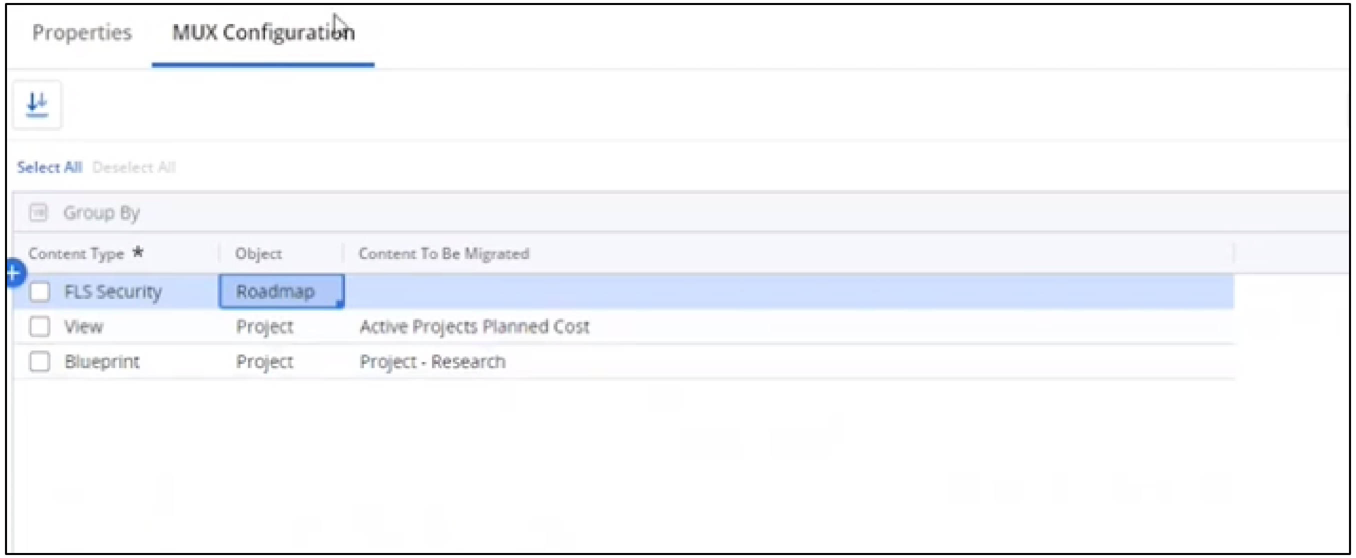
Considerations and Recommendations

- Look for areas of improvement to increase adoption, collaboration, or improve the overall use:
  - Keep up to date on the releases
  - Train users to leverage all the power that MUX offers to users such as creating views in grids, canvas etc.
  - Improve productivity and collaboration with: To Do's, Workspace Module, Conversations, Action Items, and Notifications
  - Improve navigation by using custom menu items, 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. It also enables 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.

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