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2025

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Modern UX Administration

Your Guides:
David Zywiec and Chris Ciavarella

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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



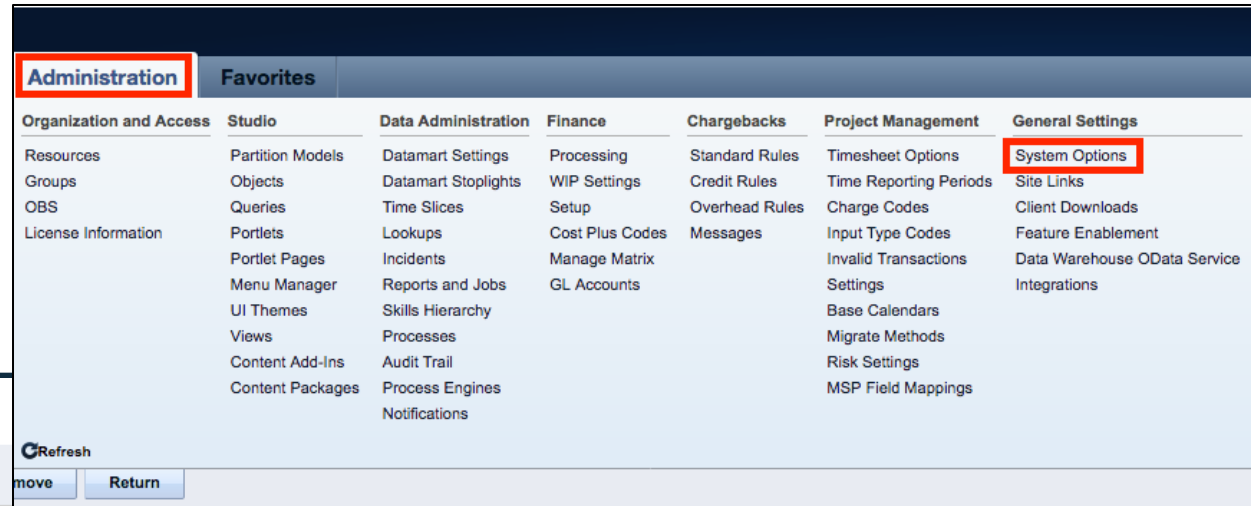
We recommend that all organizations regularly review release notes and attend available webinars to remain up to date on new functionality

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”



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)

DISPLAY AVAILABILITY AND REMAINING AVAILABILITY AMOUNTS FOR ROLES



(When unchecked, the Role Availability rate will still determine Investment Allocation amounts.)

PRIORITIZE ACCESS RIGHTS OVER ATTRIBUTE LEVEL SECURITY



SET REPORT DATE TO CURRENT DATE ON PREVIEW



SET ATTACHMENT NAME TO STATUS REPORT DATE AND CURRENT TIME ON PUBLISH



ALWAYS DISPLAY THE ADD ICON IN STATUS AND STATUSREPORT GRIDS



DISABLE CHILD ROW CREATION FOR COST PLAN DETAILS



DELETE UNSAVED VIEWS ON LOGIN



(Unsaved view will be deleted when the user accesses the workspace.)

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

The screenshot shows a software interface with a top navigation bar containing tabs: Properties, Staff, Tasks, Status (selected), Risks, Issues, Changes, Project Goals, To Dos, Checklists, Conversations, Baselines, and Documents. Below the navigation bar is a search bar and two icons (funnel and list). The main content area displays a table with the following columns: Name *, Report D... ↓, Report Status, and Attachment.

Name *	Report D... ↓	Report Status	Attachment
Status Report_2025-08-21 16:19:07	Aug 21, 2025	Draft	
Project Status abcd	Aug 21, 2025	Final	Status Report_2025-08-21 16:18:58_1755807541373.PDF

Callout 1 (left): Automated name once the option is turned on.

Callout 2 (left): Given name prior to turning the option on

Callout 3 (right): Automated name once the option is turned on.

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

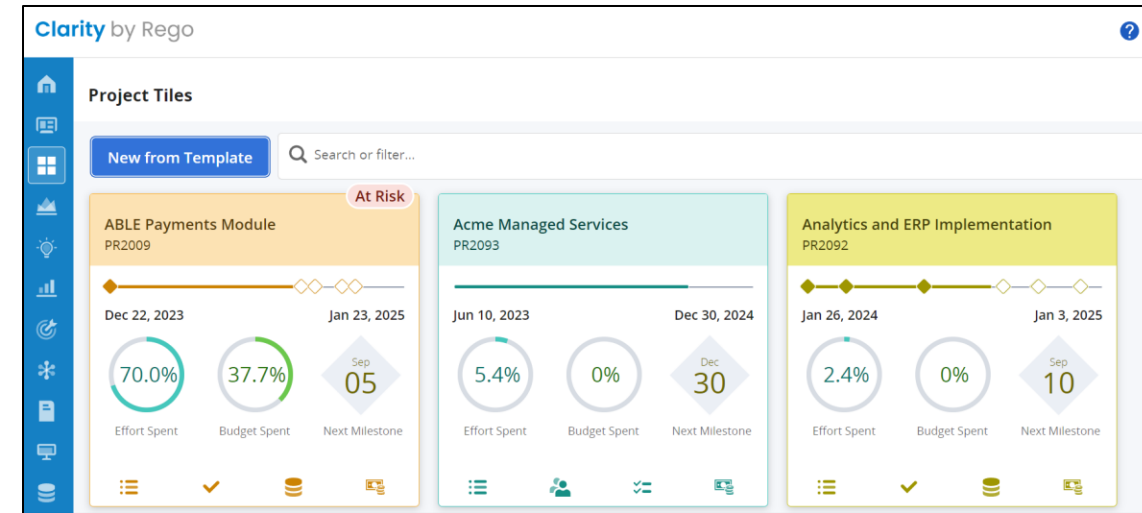


Basic Navigation

- 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)

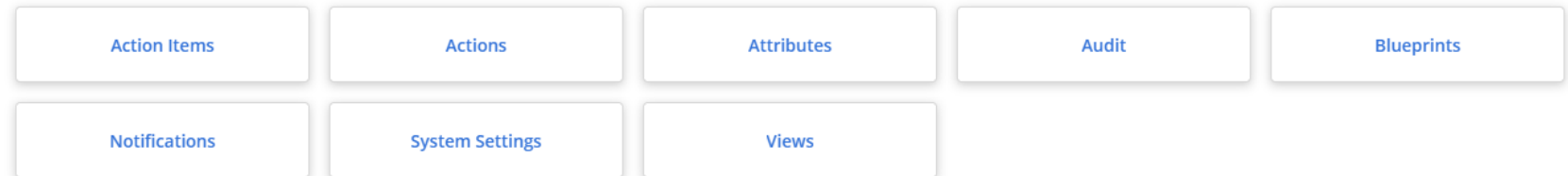


Basic Configuration – Administration Module

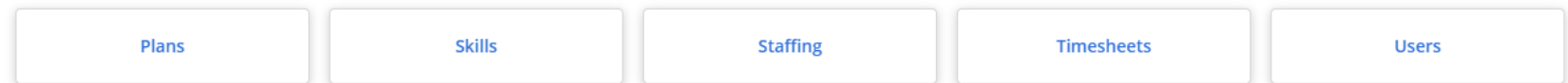
- Administrators can access the settings by using the Administration icon on the left side menu
- As part of the first time setup it is recommended to configure:
 - System Settings
 - Blueprints and Attributes

Administration

General Administration



Resource Administration



Nerdy 🤖 Administration



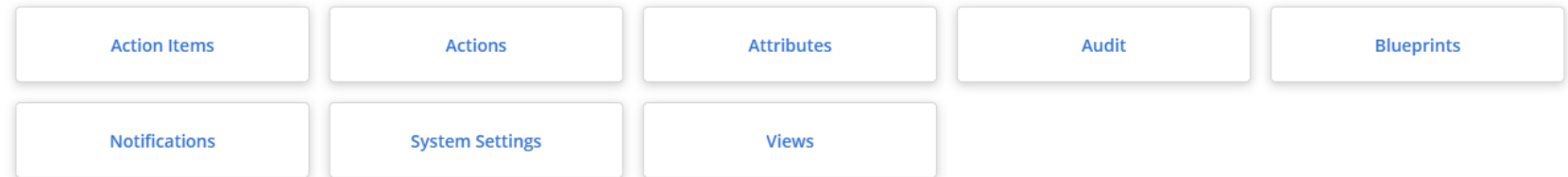
16.2.3 Allows grid customization
Screenshot shown

Basic Configuration – Administration Module

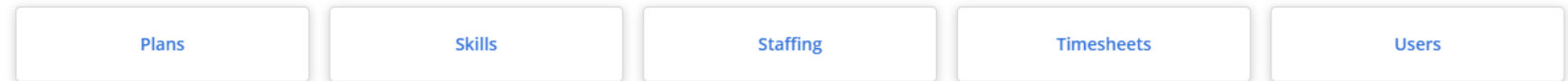
- The Administration module also includes additional settings for:
 - Action Items
 - Notifications
 - API Keys & Integrations
 - User Management
 - Work Plans configuration

Administration

General Administration



Resource Administration



Nerdy 🧐 Administration



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



System Settings

Branding Login Message Homepage Navigation Menu User Defaults

Logo

Header Logo

This logo will appear on a White background. We recommend:

- a dark color logo with a transparent background
- file type: PNG or GIF
- height: 24px, width: 480px (maximum)

Clarity by Rego

Clarity Delete Upload new logo

Image Tooltip

Login Logo

This logo will appear on a dark (or custom) background. We recommend:

- a light color logo with a transparent background
- file type: PNG or GIF
- height: 48px, width: 480px (maximum)

clarity

Upload new logo

Image Tooltip

Theme Colors

Background Color

☐ Default
 ☒ Custom #1580c4

Background color will appear in left navigation and login screen. The custom value can be in any color format. Examples are: #000, #0362FC, rgba(255, 0, 0, 0.8), hsl(270, 60%, 70%), or just a named web color, like blue.

Foreground Color

☐ Default
 ☒ Light
 ☐ Dark

The foreground color applies to icons and text in left navigation menu.

Basic Configuration – System Settings

- Under System Settings, Admins will be able to:
 - Configure Theme colors and Logos 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
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System Settings

Branding
Login Message
Homepage
Navigation Menu
User Defaults

☒ Disable
☐ Enable
☐ Schedule

Start

End

Type

Toast

Severity

Attention

Toast Options

Body*

WELCOME TO CLARITY 16.1.2 GA

Delay Before Dismiss (seconds)

5

The Toast message will be displayed to all users after login. Toast messages do not block user navigation and page interaction.

Severity - controls the icon and color applied to the message.

Duration - time until message disappears (default 5 seconds).

Marketing Blueprint published unsuccessfully
Marketing Blueprint published with errors
Marketing Blueprint published successfully
This is an information message

Info
Success
Attention
Caution
Danger

Basic Configuration – System Settings

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 - **Adjust Homepage settings to set a home page within the Modern UX per Clarity Security Group**
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System Settings

Branding
Login Message
Homepage
Navigation Menu
User Defaults

Configure Homepage by access group

Add Page

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

Unique homepages can be configured for different users based on access group.

To configure a homepage: select a page (from Clarity system pages or Custom Pages) and assign one or more access groups. Drag-n-drop rows to change priority.

If a user belongs to more than one access group, they will see the first page in the list.

Users not in any of the configured access groups will see the Default page at login.

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**
 - **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



System Settings			
Branding Login Message Homepage Navigation Menu User Defaults			
Configure main Navigation Menu			
Add Page			
	Page	Icon	Show
	Home		<input checked="" type="checkbox"/>
	Executive Dashboard		<input checked="" type="checkbox"/>
	Project Tiles		<input checked="" type="checkbox"/>
	Projects		<input checked="" type="checkbox"/>
	Ideas		<input checked="" type="checkbox"/>
	Investments		<input checked="" type="checkbox"/>
	Objectives		<input checked="" type="checkbox"/>
	Value Streams		<input checked="" type="checkbox"/>
	Programs		<input checked="" type="checkbox"/>
	Pages		<input checked="" type="checkbox"/>
	Custom Objects		<input checked="" type="checkbox"/>
	Status Reports		<input checked="" type="checkbox"/>
	Rego Power BI		<input checked="" type="checkbox"/>
	My Workspace		<input checked="" type="checkbox"/>
	Tasks		<input checked="" type="checkbox"/>
	To Dos		<input checked="" type="checkbox"/>

Basic Configuration – System Settings

- Under System Settings, Admins will be able to:
 - Configure Theme colors and Logos 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**



System Settings

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

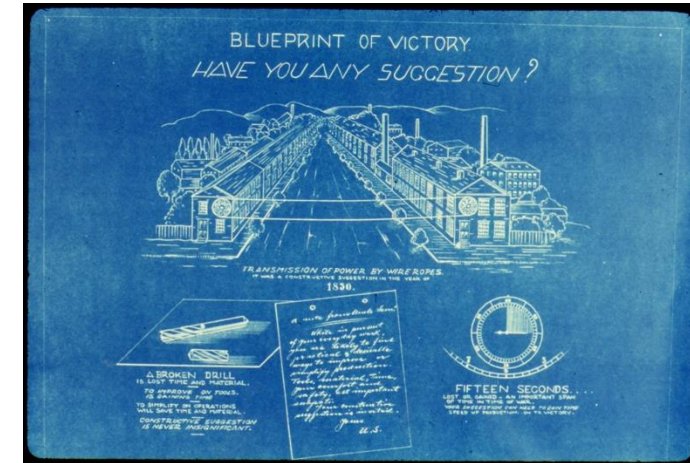
All users will be given these settings. Users who have personalized their settings will not be affected.

Unit Of Measure

☒ FTE ☐ Hours ☐ Days ☐ % Availability

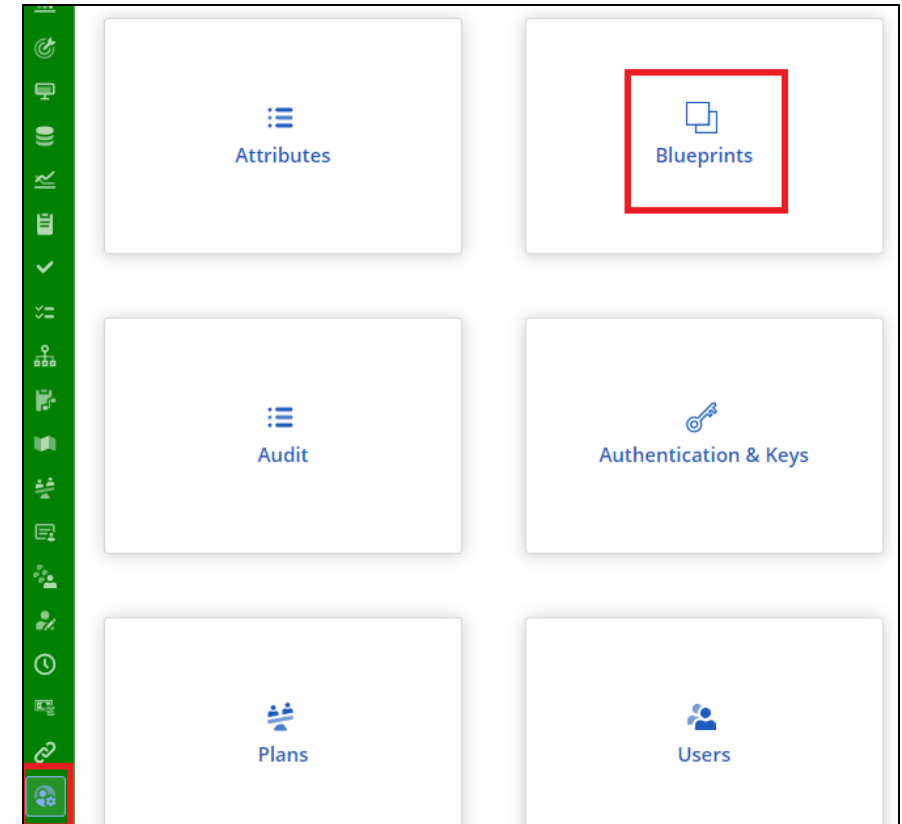
Overview

- 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



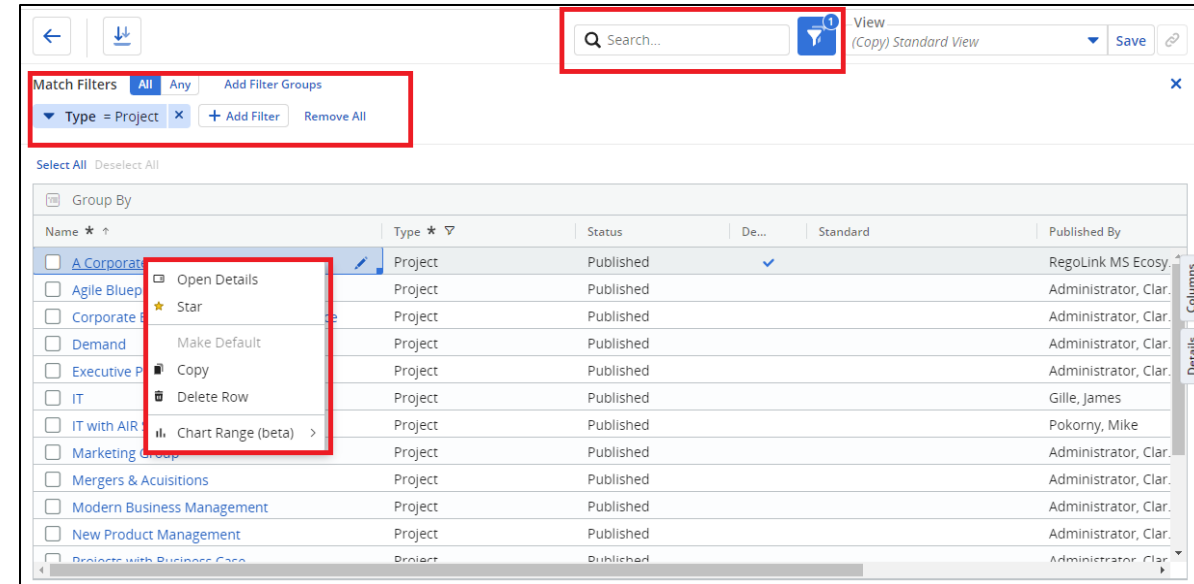
Navigation

- 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

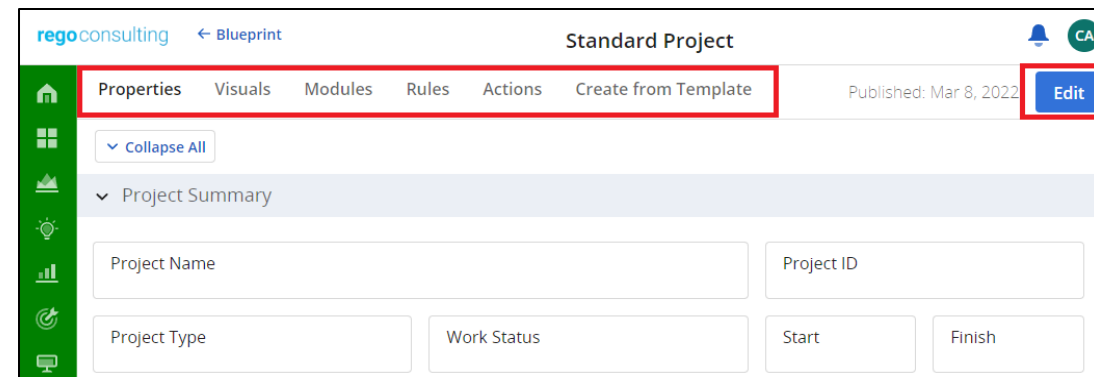
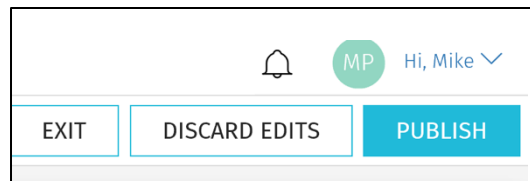
- See a list of all the Blueprints that have been created in the system
- Filter and navigate to a specific Blueprint, or perform an action:
 - Copy – Create a new Blueprint which is a one for one copy
 - Rename – Rename the Blueprint
 - Delete – Delete the Blueprint
 - Make Default
 - Any newly created 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.
 - By default, the Blueprint is in “View Only” mode
 - Clicking on “Edit” mode will allow admins to perform changes and publish afterwards
- 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.

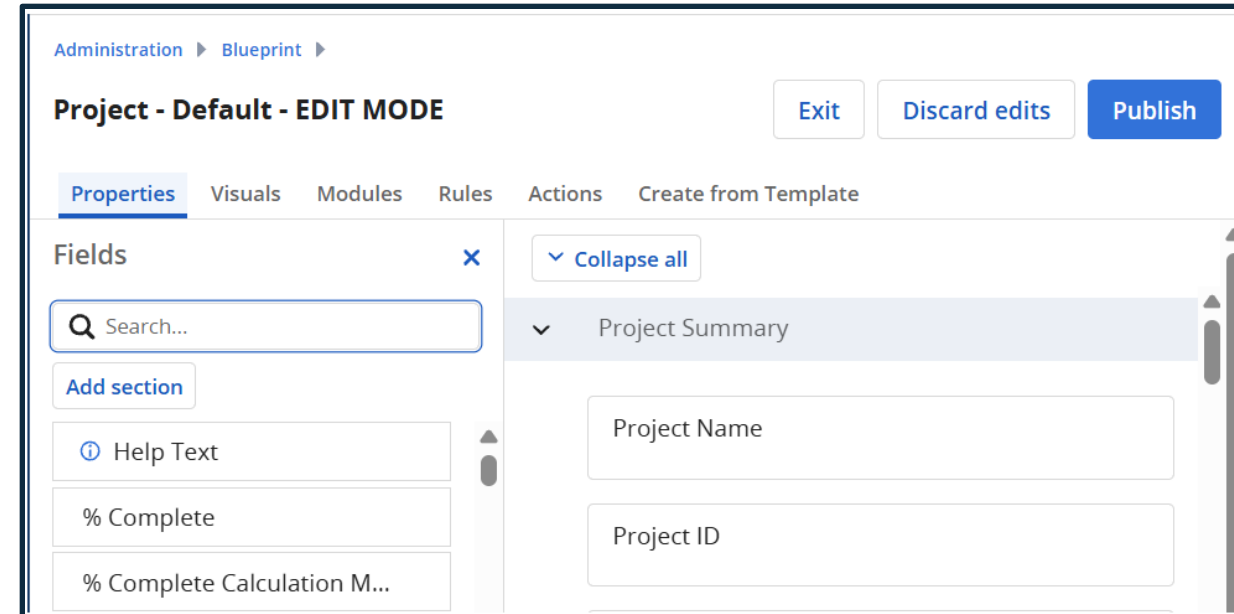


Properties



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

Administration ► Blueprint ►

Project - Default - EDIT MODE Exit Discard edits Publish

Properties Visuals Modules Rules Actions Create from Template

Fields × ▼ Collapse all

Add section

① Help Text

% Complete

% Complete Calculation M...

Project Summary

Project Name

Project ID

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

- Custom Time-Scaled Value (TSV)

Help Text Screen



Includes various options such as

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

The image shows two overlapping windows from a software application. The background window is titled 'Lifecycle' and displays a horizontal flowchart with five stages: 'Project Conception and Initiation' (dark blue), 'Project Definition and Planning' (light green), 'Project Launch or Execution' (teal), 'Project Performance and Control' (yellow), and 'Project Close' (orange). Below the flowchart are five date input fields labeled 'G1 Date', 'G2 Date', 'G3 Date', 'G4 Date', and 'G5 Date'. The foreground window is titled 'Edit Help Text' and features a rich text editor with various formatting options (font size, bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, table, image, and source code). It also has 'Cancel' and 'Save' buttons at the bottom right.

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

- ### Project - Major - EDIT MODE

Properties Visuals Modules Rules Actions Create from Template

Visuals

Search...

 - ☐ % Complete
 - ☐ Budget Remaining
 - ☒ Budget Spent
 - ☐ Days Remaining
 - ☐ Days to Start
 - ☐ Effort Remaining
 - ☐ Effort Spent
 - ☐ Finish Date
 - ☒ Next Milestone
 - ☐ Start Date

Project Name

Modules



Configured **Modules** are displayed across the top tabs for end users as they navigate into Properties view

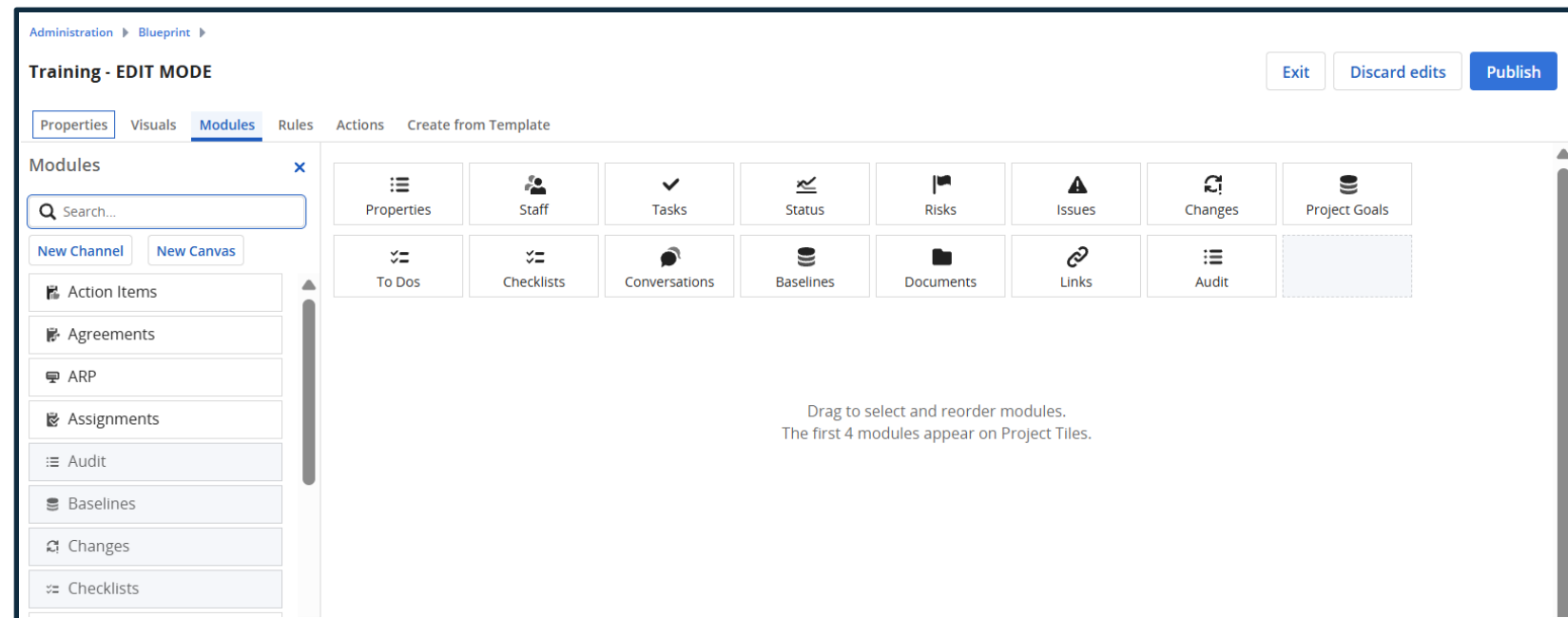


There are several core Modules which are not configurable and provide functionality like project financials, To-Dos, etc.



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

The screenshot displays the 'ABLE Payments' project interface. The top navigation bar includes tabs for Properties, Tasks, Baselines, Financials, Staff, Assignments, Risks, Issues, Changes, Decisions, Checklists, To Dos, Status, Dashboard, Workflow, Documents, Agreements, and Audit. The 'Workflow' tab is active, showing a project named 'eCommerce Portal - Processes - Initiated'. Below this, there are fields for PROCESS NAME, PROCESS ID, FROM START DATE, TO START DATE, STATUS (set to 'All'), and INITIATED BY.

The 'Project - Major - EDIT MODE' section is open, showing a 'Modules' list on the left and a grid of module icons on the right. The 'Workflow' module is selected. The 'Configure - Workflow' section shows the following configuration:

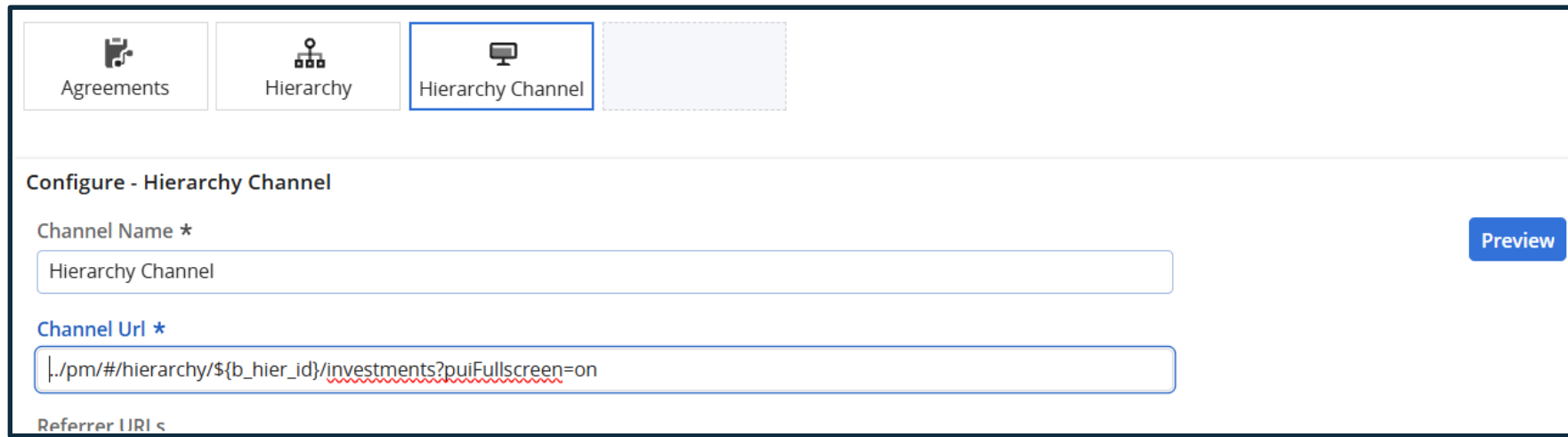
- Channel Name: Workflow
- Channel Url: `../miku/hu#action:projmgr.projectProcessInstances&object_type=project&object_id=5002053&ui.page.space=mainnav.work&ui.page.template=u...`
- Referrer URLs: (empty field)

Buttons for 'Preview' and 'Delete' are visible at the bottom right of the configuration section.

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 "?“



The screenshot shows the 'Configure - Hierarchy Channel' interface. At the top, there are four tabs: 'Agreements', 'Hierarchy', 'Hierarchy Channel' (which is selected and highlighted with a blue border), and an empty tab. Below the tabs, the title 'Configure - Hierarchy Channel' is displayed. The form contains two main input fields: 'Channel Name *' with the value 'Hierarchy Channel' and 'Channel Url *' with the value '|../pm/#/hierarchy/\${b_hier_id}/investments?puifullscreen=on'. A red squiggly underline is visible under the URL. To the right of the 'Channel Name' field is a blue 'Preview' button. At the bottom, the 'Referrer URLs' label is partially visible.

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>}`

Agreements Hierarchy Hierarchy Channel

Configure - Hierarchy Channel

Channel Name *

Hierarchy Channel

Preview

Channel Url *

_.pm/#/hierarchy/\${b_hier_id}/investments?puiFullscreen=on

Referrer URL s

Modules – Custom Sub-Objects

- Custom sub-objects of Projects, Ideas, or Custom Investments as a Module in the New User Experience
- Check the **“API Enabled”** checkbox on the existing custom object or a new custom object
 - **Once this is checked and saved, it can’t be undone**
- After saving, an API Attribute ID will be automatically created for the object and it will be available as a Module
- Depending on the Clarity version, newer functionality is available:
 - Exposing 2nd and 3rd level sub-objects
 - Configuring “Properties pane” for the sub-objects

The screenshot displays the Clarity configuration interface for a custom sub-object. The 'Subobject' tab is selected, showing various checkboxes: 'Event Enabled', 'Include in the Data Warehouse', 'Copy Enabled', 'Export Enabled', 'View All Enabled', and 'API Enabled'. The 'API Enabled' checkbox is checked and highlighted with a red box, with a note below it stating '(Once the value is enabled, it cannot be disabled.)'. Below the checkboxes are 'Save' and 'Save And Return' buttons. A legend indicates that a red square means 'Required' and a green arrow means 'Enter Once'. The 'Properties' pane is open, showing the 'Object Name' as 'Test Sub Object', 'Object ID' as 'test_sub_prj_obj', and 'API Attribute ID' as 'custTestSubPrjObjs', which is highlighted with a red box. The 'Content Source' is set to 'Description'. At the bottom, a grid of modules is shown, with 'TEST SUB OBJECT' highlighted with a red box.

Modules – Custom Sub-Objects Blueprint

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

Edit module details

☐ Enable Properties Navigation

☒ Enable Quick Create

☐ Enable Create Dialog

☒ Show in Details Flyout

Rules

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



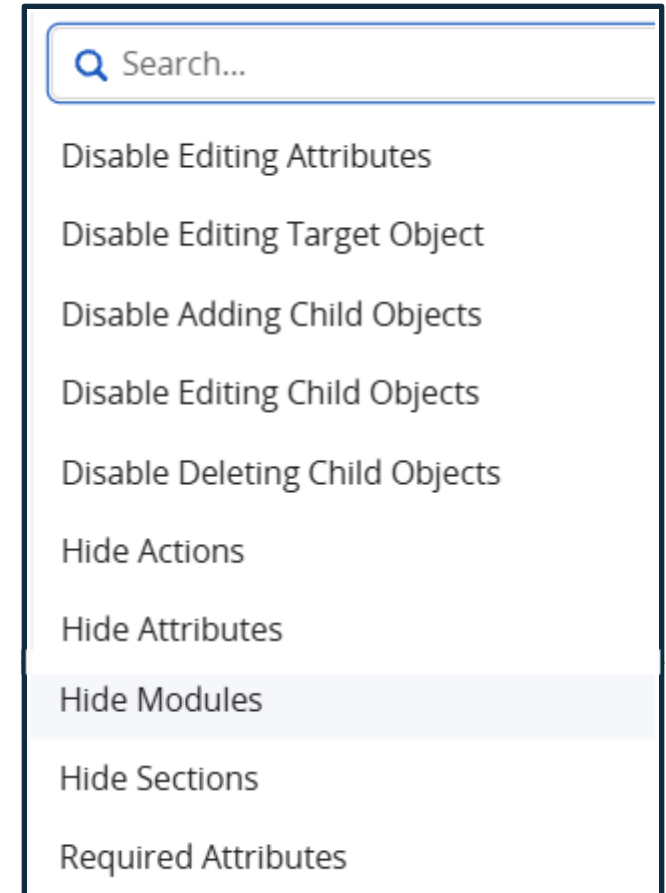
Conditional Required Modal

- 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

New Rule

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)
- ☐ Security Update - Runs only when a selected resource attribute is updated (Data action only)
- ☐ Conditional Required Modal - Runs only when a selected attribute is updated, supports only one condition (UI action only)

Conditions

☒ Always True

Match Filters All Any

% Complete = 50% - 60%
Active = Yes
Business Alignment > 15
Alignment ≠ 100
+ Add filter
Remove all

Actions

+ Add actions

Incomplete Rule: At least one Condition and one Action are required for a rule to be enabled

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**

New Rule

When Active flag is set to No, execute this rule

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)
 ☐ Security Update - Runs only when a selected resource attribute is updated (Data action only)
 ☐ Conditional Required Modal - Runs only when a selected attribute is updated, supports only one condition (UI action only)

Target Attribute

Active

If Is Equal To No × + Select, then;

Data Actions- Runs once, when condition becomes true

Send Action Item

Set Attributes

% Complete

100.00%

Banner Color

Orange

+ Add actions

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

Disable Editing Target Ob...

Disable Editing Child Obj...

Disable All Except Selected

Status Report × + Select

Let Rego be your guide.

regoUniversity2025

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

New Rule

Rule Name *

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)
 ☒ Security Update - Runs only when a selected resource attribute is updated (Data action only)
 ☐ Conditional Required Modal - Runs only when a selected attribute is updated, supports only one condition (UI action only)

Target Resource Attribute

Sponsor

☒ This action disables copying and bulk editing on the selected attribute. Only one Security Update rule per attribute.

If value is changed, then;

Transfer Rights from Previous to New Resource

+ Add rights

Project - Approve x

Project - Edit x

Project - Edit Management x

Project - Edit All - Status Report x

Project - Budget Plan - Approve x

+ Add actions

Conditional Required Modal Rule

New Rule

Rule Name *
When Active field is changed

Target Object
Project

Description
Enter the rule description

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)
☐ Security Update - Runs only when a selected resource attribute is updated (Data action only)
☒ Conditional Required Modal - Runs only when a selected attribute is updated, supports only one condition (UI action only)

Target Attribute
Active

If Is Equal To + Select, then open a modal. - *Configure the modal on the next page*

Is Equal To
 Is Not Equal To
 Is Empty
 Is Not Empty
 Value Changes

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

Conditional Required Modal

Fields

 Planned NPV
 Planned Payback Period
 Portfolio Category 1
 Portfolio Category 2
 Portfolio Category 3
 Portfolio Category 4
 Priority
 Product Brief
 Progress *
 Project Classification
 Project Definition/Classifi...
 Project Description
 Project Goal
 Project ID *
 Project Lead
 Project Name *
 Rally Formatted ID

Modal Title
Conditional Required Modal

Active

Description
Enter values for all required attributes.

Active change explanation 1

Financial Model Signed off Member-facing Product / Service Project Classification

Cancel Back Create

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

Properties Modules Rules Actions Create from Template					
<div>Add Process</div> <div>↓ ↓ Add Process</div>					
Select All Deselect All					
Group By					
Order * ↑	ID *	Name *	Enabled *	Process Name *	
<input type="checkbox"/>	1 00000460	Allocate From Estimates	✓		
<input type="checkbox"/>	2 00000491	Contractor Reminders	✓	Contractor Reminders	

Create from Template



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

clarity



New From Template

New Project

Investment name *

Start *

Finish *

Sep 8, 2023

Sep 8, 2023

Cancel Create

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.

Administration ▶ Blueprint ▶

Project - Executive Published: Aug 30, 2024 [Edit](#)

Properties Visuals Modules Rules Actions Create from Template

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

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

New Project

Project Name

Start

Finish

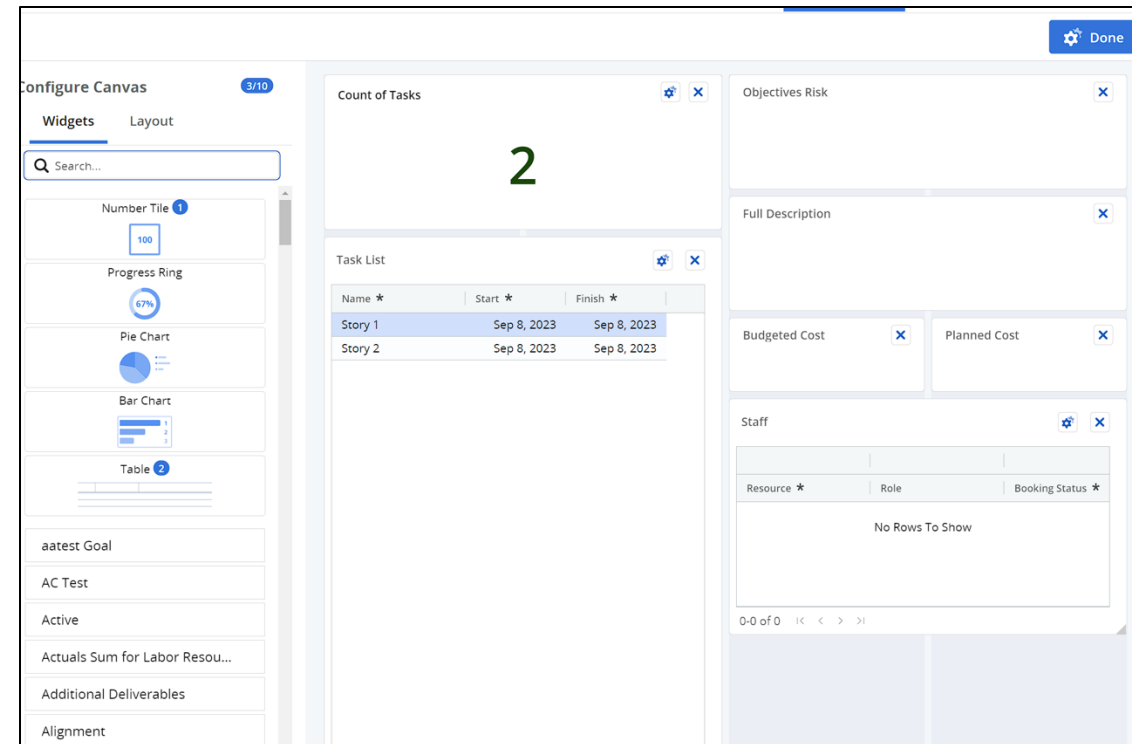
Banner Color

Charge Code

Cost Type

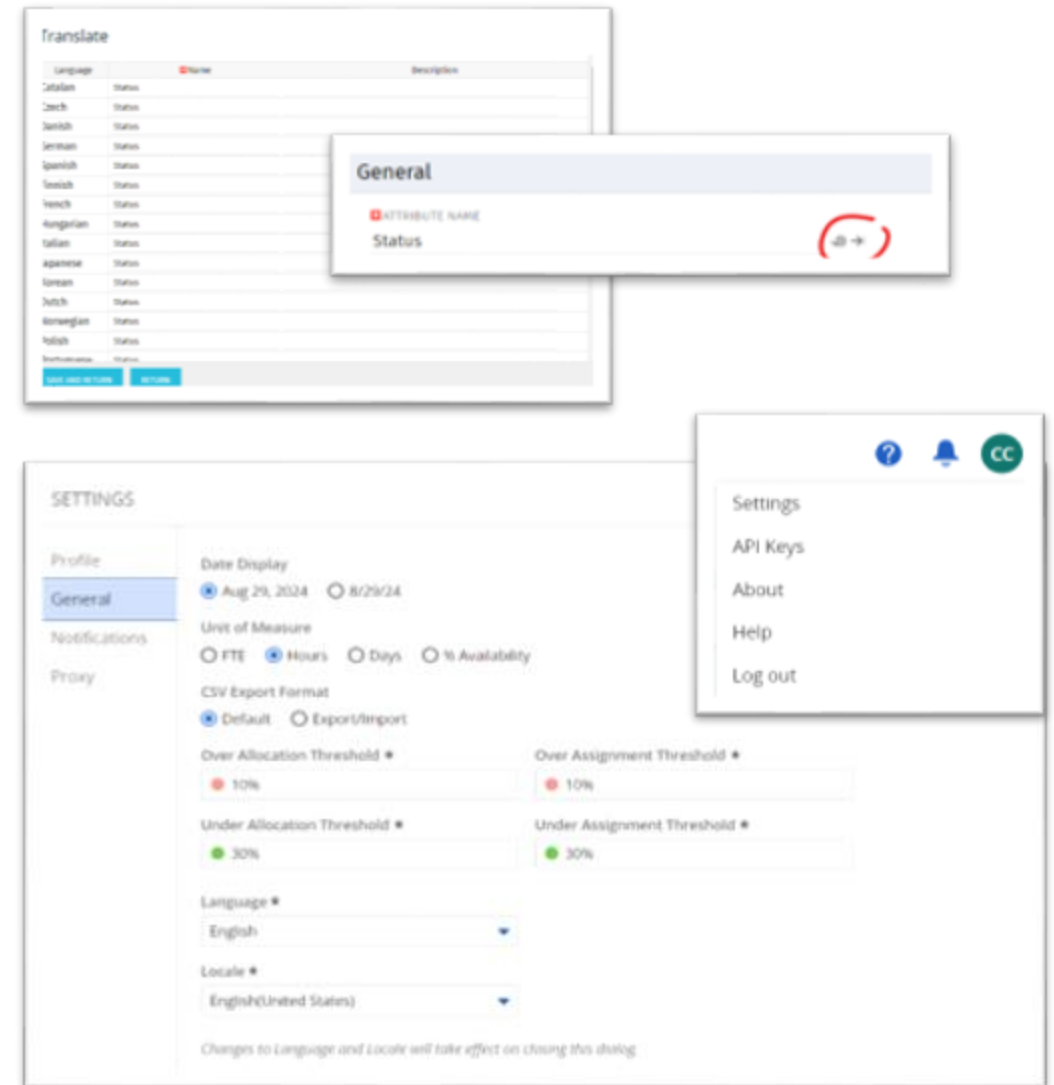
Canvas

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

New Rule

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)
- ☐ Security Update - Runs only when a selected resource attribute is updated (Data action only)
- ☐ Conditional Required Modal - Runs only when a selected attribute is updated, supports only one condition (UI action only)

Conditions

☒ Always True

Match Filters All Any

% Complete = 50% - 60%
Active = Yes
Business Alignment > 15
Alignment ≠ 100
+ Add filter
Remove all

Actions

+ Add actions

Incomplete Rule: At least one Condition and one Action are required for a rule to be enabled

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

New Rule

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)
- ☐ Security Update - Runs only when a selected resource attribute is updated (Data action only)
- ☐ Conditional Required Modal - Runs only when a selected attribute is updated, supports only one condition (UI action only)

Conditions

☒ Always True

Match Filters All Any

▼ % Complete = 50% - 60% x
▼ Active = Yes x
▼ Business Alignment > 15 x
▼ Alignment ≠ 100 x
+ Add filter
Remove all

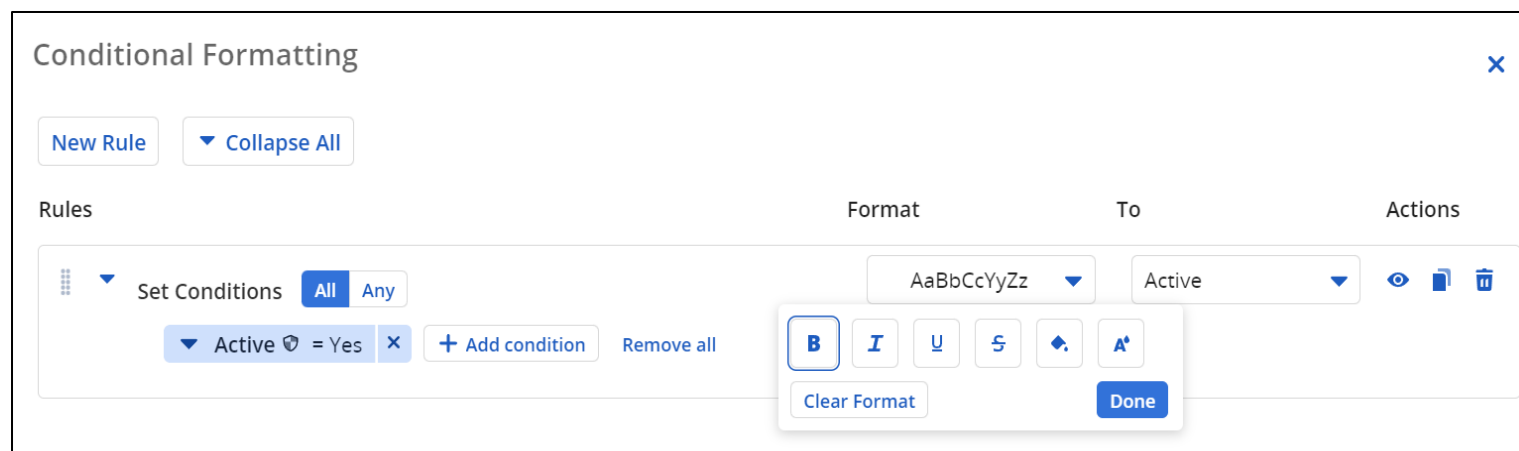
Actions

+ Add actions

Incomplete Rule: At least one Condition and one Action are required for a rule to be enabled

Conditional Formatting

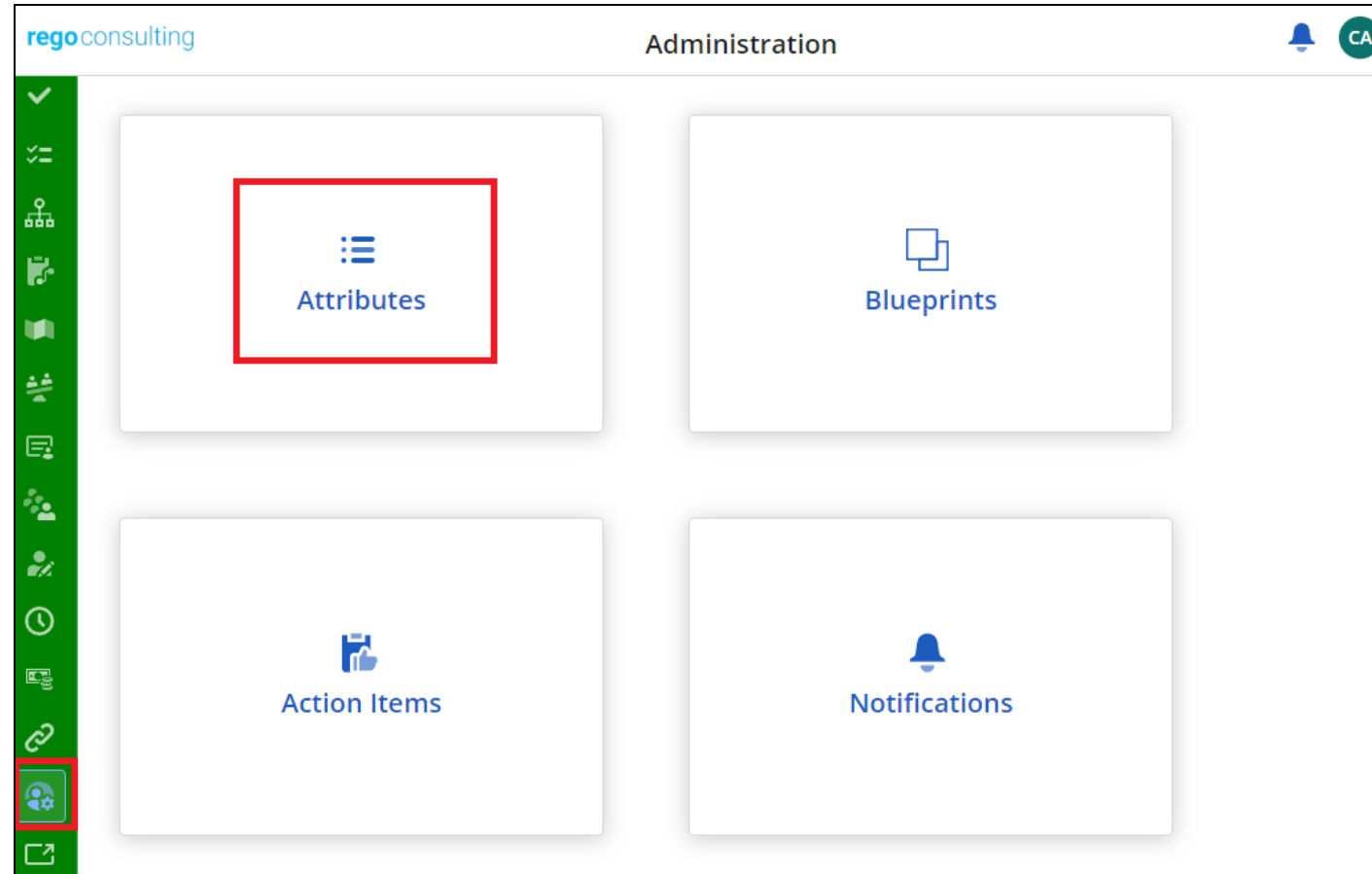
- Conditional Formatting is now available on the list areas in the modern experience as of 16.2
- Rules: Apply a positive test scenario
- Format: Applies the below to the To
 - Bold
 - Italics
 - Underline
 - Strikethrough
 - Background Color
 - Font Color
- To: What column should be affected by the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

Attribute	Attribute ID	Object	Secure	Access Edit	Access View	Database Table	Database Column	Access	Label	Description	Tooltip
% Complete	percent_complete	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	inv_projects	percent_complete	✓	Percent Complete		
% Complete Calculation...	percent_calc_mode	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	inv_projects	percent_calc_mode	✓	Percent Complete ...		
% Done By Agile Plan E...	agl_pctdon_plest	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	agl_pctdon_plest	✓	% Done By Agile Pl...		
% Done by Story Count	agl_pctdon_stc	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	agl_pctdon_stc	✓	% Done By Story C...		
AC Initiative ID	r_initiative_id	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	r_initiative_id	✓	Rally Initiative ID		
AC Initiative Link	r_initiative_link	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	r_initiative_link	✓	Rally Initiative Link		
AC Initiative Name	r_initiative_name	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	r_initiative_name	✓	Rally Initiative Name		
AC Last Sync Date	r_last_sync_date	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	r_last_sync_date	✓	Rally Last Sync Date		
AC Project	r_ac_project	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	r_ac_project	✓	Rally Project		
AC Risk Score	r_risk_score	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	r_risk_score	✓	Rally Risk Score		
AC Sync Features	r_import_epic_featur	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	r_import_epic_featur	✓	Rally Sync Features		
Accepted Story Points	agl_acp_stypts	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	agl_acp_stypts	✓	Rally Accepted Stor...	Accepted Story Poi...	
Accepted User Stories	agl_acp_usrsty	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	odf_ca_project	agl_acp_usrsty	✓	Rally Accepted Stor...	Accepted User Stor...	

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

Attribute	Attribute ID	Object	Secure	Access Edit	Access View	Database Table	Database Column	Ac...	Label	Description	Tooltip
% Complete	percent_complete	Project				inv_projects	percent_complete	✓	Percent Complete	Percent Complete ...	
% Complete Calculatio...	percent_calc_mode	Project				inv_projects	percent_calc_mode	✓	Percent Complete ...	Percent Complete ...	
% Done By Agile Plan E...	agl_pctdon_plest	Project				odf_ca_project	agl_pctdon_plest	✓	% Done By Agile Pl...	% Done By Agile Pl...	
% Done by Story Count	agl_pctdon_stc	Project				odf_ca_project	agl_pctdon_stc	✓	% Done By Story C...	% Done By Story C...	
AC Initiative ID	r_initiative_id	Project				odf_ca_project	r_initiative_id	✓	Rally Initiative ID		
AC Initiative Link	r_initiative_link	Project				odf_ca_project	r_initiative_link	✓	Rally Initiative Link		
AC Initiative Name	r_initiative_name	Project				odf_ca_project	r_initiative_name	✓	Rally Initiative Name		
AC Last Sync Date	r_last_sync_date	Project				odf_ca_project	r_last_sync_date	✓	Rally Last Sync Date		
AC Project	r_ac_project	Project				odf_ca_project	r_ac_project	✓	Rally Project		
AC Risk Score	r_risk_score	Project				odf_ca_project	r_risk_score	✓	Rally Risk Score		
AC Sync Features	r_import_epic_featur	Project				odf_ca_project	r_import_epic_featur	✓	Rally Sync Features		
Accepted Story Points	agl_acp_stypts	Project				odf_ca_project	agl_acp_stypts	✓	Rally Accepted Stor...	Accepted Story Poi...	
Accepted User Stories	agl_acp_usrsty	Project				odf_ca_project	agl_acp_usrsty	✓	Rally Accepted Stor...	Accepted User Stor...	

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

Attributes

Investment Parents

Set the allowed parent types of investments

Add Investment Type

Investment Type	Allowed Parent Types
Applications	Solutions

By default the Parent attribute displays all Investment Types.

Adding an Investment Type here allows you to restrict the Investment Types that display in the Parent attribute to only the Parent Types selected.

Leaving the Allowed Parent Types blank prevents assigning a parent to investments of that type.

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

Administration > Attributes

Attributes Investment Parents

Search: risk

Match Filters: All Any Add filter groups

+ Add filter Remove all

Group By

Attribute	Attribute ID	Display Type	Label
Associated Risks	associated_risks	Value	
Calculated Risk	calculated_risk	Range Description	
ID	rim_risk_issue_code		
ID	rim_risk_issue_code		
ID	rim_risk_issue_code		
Flexibility Risk	inv_rcf_flexibility		
Flexibility Risk	inv_rcf_flexibility		
Flexibility Risk	inv_rcf_flexibility		

Lookup: Risk Probability

Partition: System

Lookup Value	ID	Partition
<input type="checkbox"/> Low	1	System
<input type="checkbox"/> Medium	2	System
<input type="checkbox"/> High	3	System

Search...

- Range Description
- Value
- Range Description and Value

Object: Risk | Attribute: Impact - Object Attribute

Display Mappings

Type: Color

Color	Description	Value
White	Default Bucket	1 2 3
Green	Green	Low
Yellow	Yellow	Medium
Red	Red	High

Object: Risk | Attribute: Calculated Risk - Object Attribute

Display Mappings

Type: Color

Color	Description	From	To
White	Default Bucket		
Green	Low	1	3
Yellow	Medium	3	6
Red	High	6	9

Probability | Impact | Calculated ...

Low | Red | Medium: 3

Value 1-3 | Range Description 1-3 | Range Description and Value 1-9

Force Attribute Update

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

 ATTRIBUTE NAME

Adoption - Data Quality Metric

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

Search...

View (Copy) Views - Default

Match Filters: All Any Add filter groups

Owner Select X + 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
<input type="checkbox"/> (Copy) Standard View	zAdministrator, Services	Active	Private				Workspace	To Dos	zAdministrator, Services	Jul 28, 2025	Investments
<input type="checkbox"/> (Copy) Standard View	zAdministrator, Services	Active	Private				Administration		zAdministrator, Services	Aug 22, 2025	Notifications
<input type="checkbox"/> Actual Transactions - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Actual Transactions
<input type="checkbox"/> Agreements - Default	zAdministrator, Services	Active	Everyone			✓			zAdministrator, Services	Jul 16, 2025	Agreements
<input type="checkbox"/> All To Dos - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	To Dos	zAdministrator, Services	Jul 28, 2025	All To Dos
<input type="checkbox"/> Allocations by Investment - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Allocations by Investment
<input type="checkbox"/> Allocations by Resource - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Allocations by Resource
<input type="checkbox"/> AR Staff - Default	zAdministrator, Services	Active	Private				Investment		zAdministrator, Services	Jun 6, 2025	Staff
<input type="checkbox"/> Assignments By Investment - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Assignments by Investment
<input type="checkbox"/> Assignments by Resource - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Assignments by Resource
<input type="checkbox"/> Attributes - Default	zAdministrator, Services	Active	Specific Groups/People	Admin		✓	Administration		zAdministrator, Services	Jul 16, 2025	Attributes
<input type="checkbox"/> Attributes - Re-labelled	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
<input type="checkbox"/> Attributes - Secured	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
<input type="checkbox"/> Attributes - Tooltip	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
<input type="checkbox"/> Baselines - Default	zAdministrator, Services	Active	Everyone			✓	Project		zAdministrator, Services	Jul 16, 2025	Baselines
<input type="checkbox"/> Benefit Plan Details - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Benefit Plan Details
<input type="checkbox"/> Benefit Plans - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Benefit Plans
<input type="checkbox"/> Blueprint - Custom	zAdministrator, Services	Active	Everyone				Administration		zAdministrator, Services	Jul 16, 2025	Blueprints
<input type="checkbox"/> 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
- Change whether a view is “recommended”

Administration > Views

Search... 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
<input type="checkbox"/> (Copy) Standard View	zAdministrator, Services	Active	Private				Workspace	To Dos	zAdministrator, Services	Jul 28, 2025	Investments
<input type="checkbox"/> (Copy) Standard View	zAdministrator, Services	Active	Private				Administration		zAdministrator, Services	Aug 22, 2025	Notifications
<input type="checkbox"/> Actual Transactions - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Actual Transactions
<input type="checkbox"/> Agreements - Default	zAdministrator, Services	Active	Everyone			✓			zAdministrator, Services	Jul 16, 2025	Agreements
<input type="checkbox"/> All To Dos - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	To Dos	zAdministrator, Services	Jul 28, 2025	All To Dos
<input type="checkbox"/> Allocations by Investment - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Allocations by Investment
<input type="checkbox"/> Allocations by Resource - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Allocations by Resource
<input type="checkbox"/> AR Staff - Default	zAdministrator, Services	Active	Private				Investment		zAdministrator, Services	Jun 6, 2025	Staff
<input type="checkbox"/> Assignments By Investment - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Assignments by Investment
<input type="checkbox"/> Assignments by Resource - Default	zAdministrator, Services	Active	Everyone			✓	Workspace	Staffing	zAdministrator, Services	Jul 16, 2025	Assignments by Resource
<input type="checkbox"/> Attributes - Default	zAdministrator, Services	Active	Specific Groups/People	Admin		✓	Administration		zAdministrator, Services	Jul 16, 2025	Attributes
<input type="checkbox"/> Attributes - Re-labelled	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
<input type="checkbox"/> Attributes - Secured	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
<input type="checkbox"/> Attributes - Tooltip	zAdministrator, Services	Active	Specific Groups/People	Admin			Administration		zAdministrator, Services	Jul 16, 2025	Attributes
<input type="checkbox"/> Baselines - Default	zAdministrator, Services	Active	Everyone			✓	Project		zAdministrator, Services	Jul 16, 2025	Baselines
<input type="checkbox"/> Benefit Plan Details - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Benefit Plan Details
<input type="checkbox"/> Benefit Plans - Default	zAdministrator, Services	Active	Everyone			✓	Investment		zAdministrator, Services	Jul 16, 2025	Benefit Plans
<input type="checkbox"/> Blueprint - Custom	zAdministrator, Services	Active	Everyone				Administration		zAdministrator, Services	Jul 16, 2025	Blueprints
<input type="checkbox"/> Blueprint - Default	zAdministrator, Services	Active	Everyone				Administration		zAdministrator, Services	Jul 16, 2025	Blueprints

Action Items and Notifications

Step 1: Define an Action Item

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

Create New Action Item - Step 1 of 3

Description
Identify and map the action item.

Name *
Project Stage Approval

Target Object *
Project

Description

Content
Configure the message to recipients.

Subject *
Project Stage is changing to \${Project.stage_code}

Priority
Medium

+ Add attribute

Message
Project Stage is changing to \${Project.stage_code} on Project \${Project.name}

+ Add attribute

Create New Action Item - Step 2 of 3

Recipients
Assign the action item.

Resource Attribute

Access Group
PMO Project Manager

Resource

Actions
Add Actions *
Approved, Rejected

Back Next

Create New Action Item - Step 3 of 3

Decisions & Actions
All recipients can choose from decisions selected here.

If Approved decision is submitted by Any Recipients then;

Close Action item for all recipients

Set Attribute Work Status Complete

+ Add action

If Rejected decision is submitted by Any Recipients then;

Close Action item for all recipients

Set Attribute Work Status On Hold

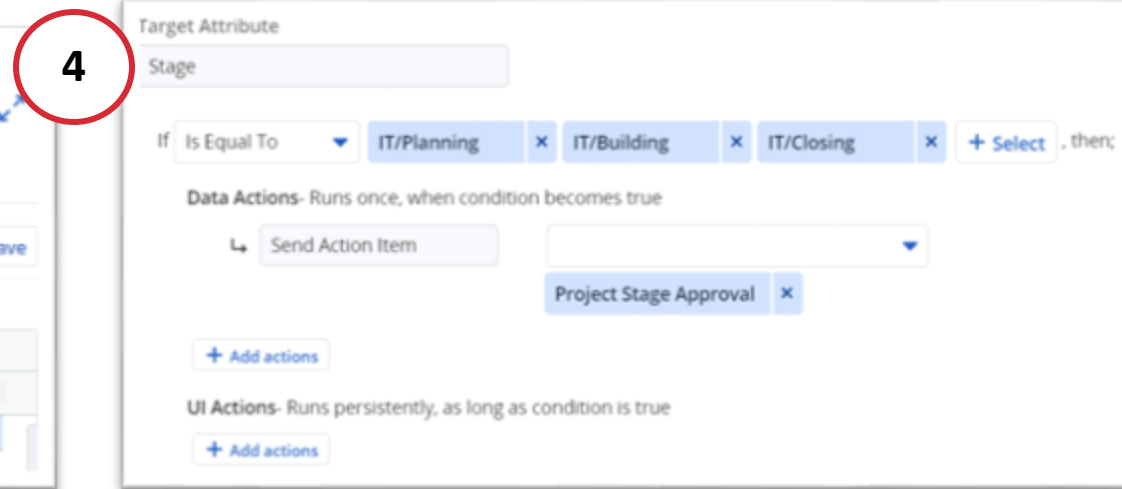
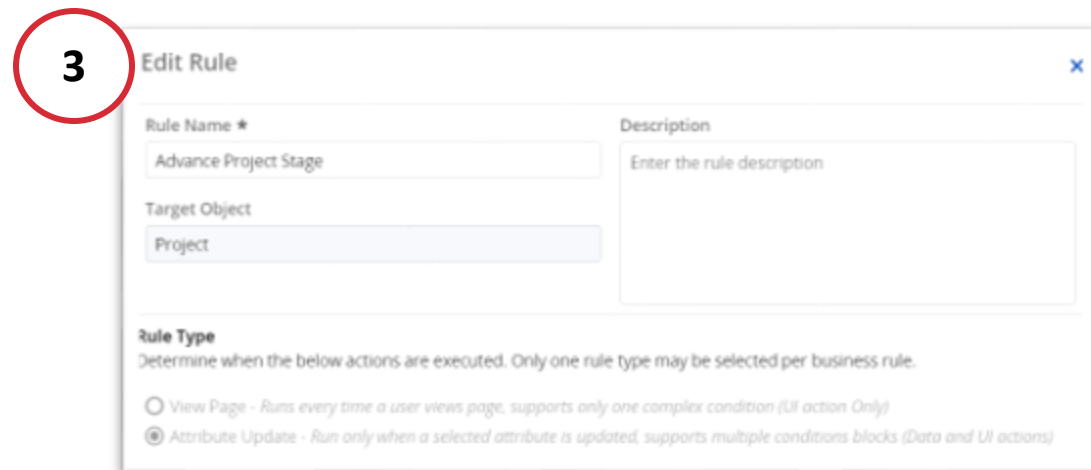
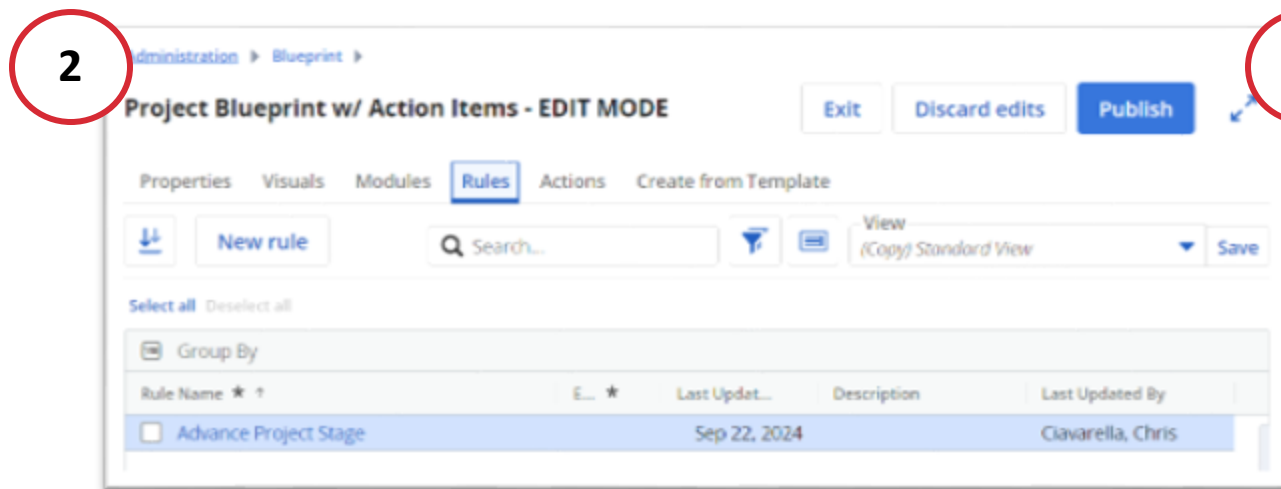
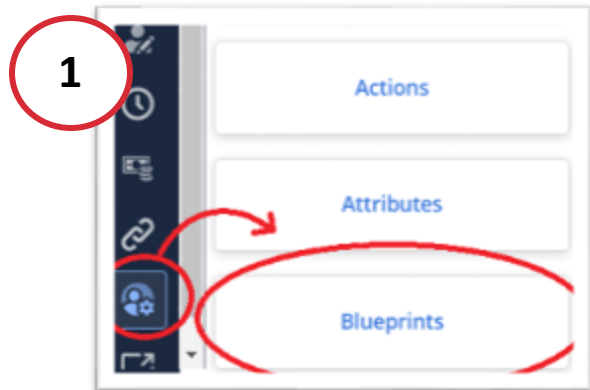
+ Add action

Add condition

Cancel Back Save

Action Items and Notifications

Step 2: Define an Action Item Trigger



Action Items and Notifications

Step 3: Trigger an Action Item

The screenshot shows a project management 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 a dropdown menu. A red arrow points from the 'IT/Planning' stage in the table to a 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

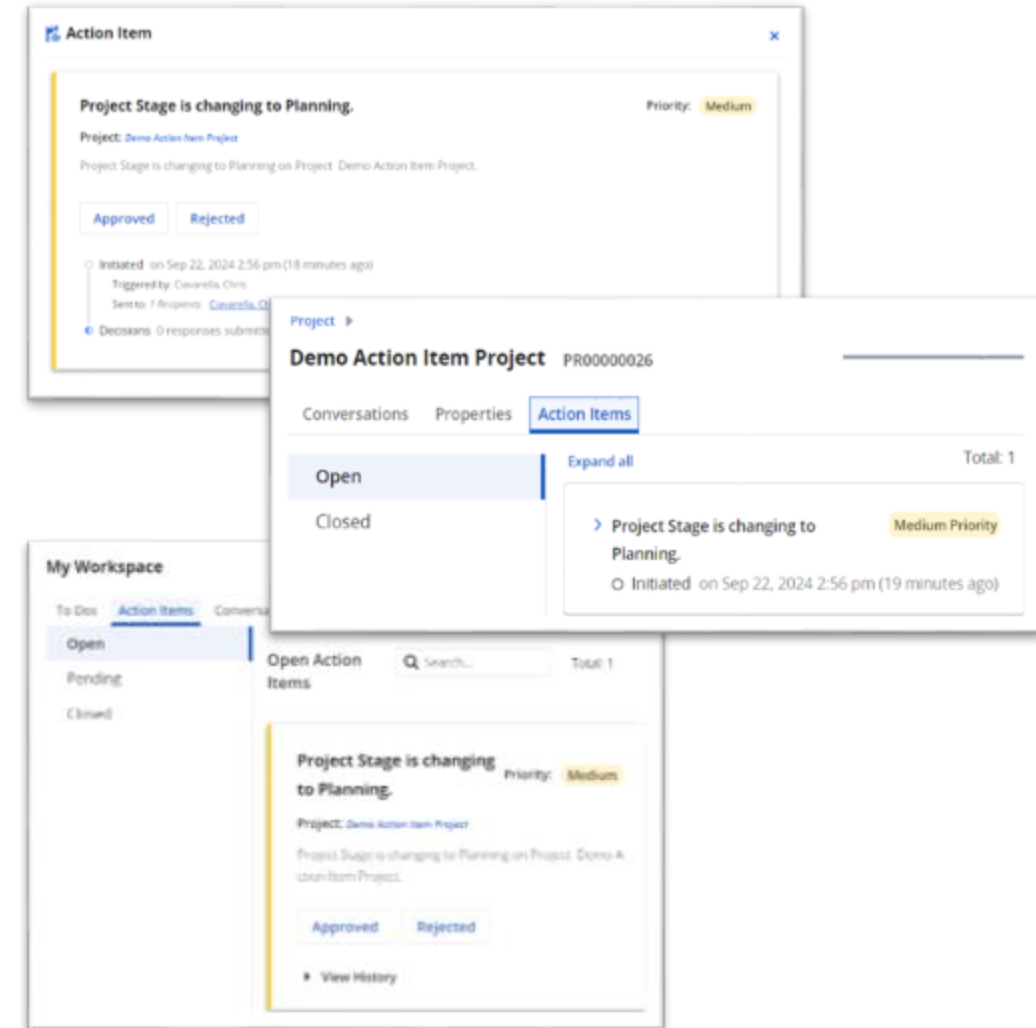
3

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

Action Items 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


Administration ▸

Notifications


[New Notification](#)
Q Search...

Select all Deselect all

Group By

Target Object *	Name *	Assigned Resource	Assigned Resource Attribute
<input type="checkbox"/> To Do	To Do Notifications 	Creator, idea	Owner

Create New Notification - Step 1 of 2

Description
Identify and map the notification.

Name * Target Object *

Description

Content
Configure the message to recipients.

Subject* Priority

[+ Add attribute](#)

Message

[+ Add attribute](#)

[Cancel](#) [Next](#)

Simple Notifications

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

Create New Notification - Step 2 of 2 ×

Condition Type
☒ Simple ☐ Complex

Recipients
When the value of the selected Resource Attribute is updated, the selected resources will receive a notification.

Resource Attribute (recipient) *

Owner ▼

Cancel

Back

Save

Complex Notifications

Create New Notification - Step 2 of 3

Condition Type

☐ Simple ☒ Complex

Send Conditions

Establish when this notification will be sent.

Target Attribute *

Due Date

If Target Attribute

Is Not Empty

, then;

↳ Send notification to recipients

Cancel

Back

Next

Create New Notification - Step 3 of 3

Recipients

Establish to whom this notification will be sent.

Resource Attribute

Owner

Access Group

Resource

Cancel

Back

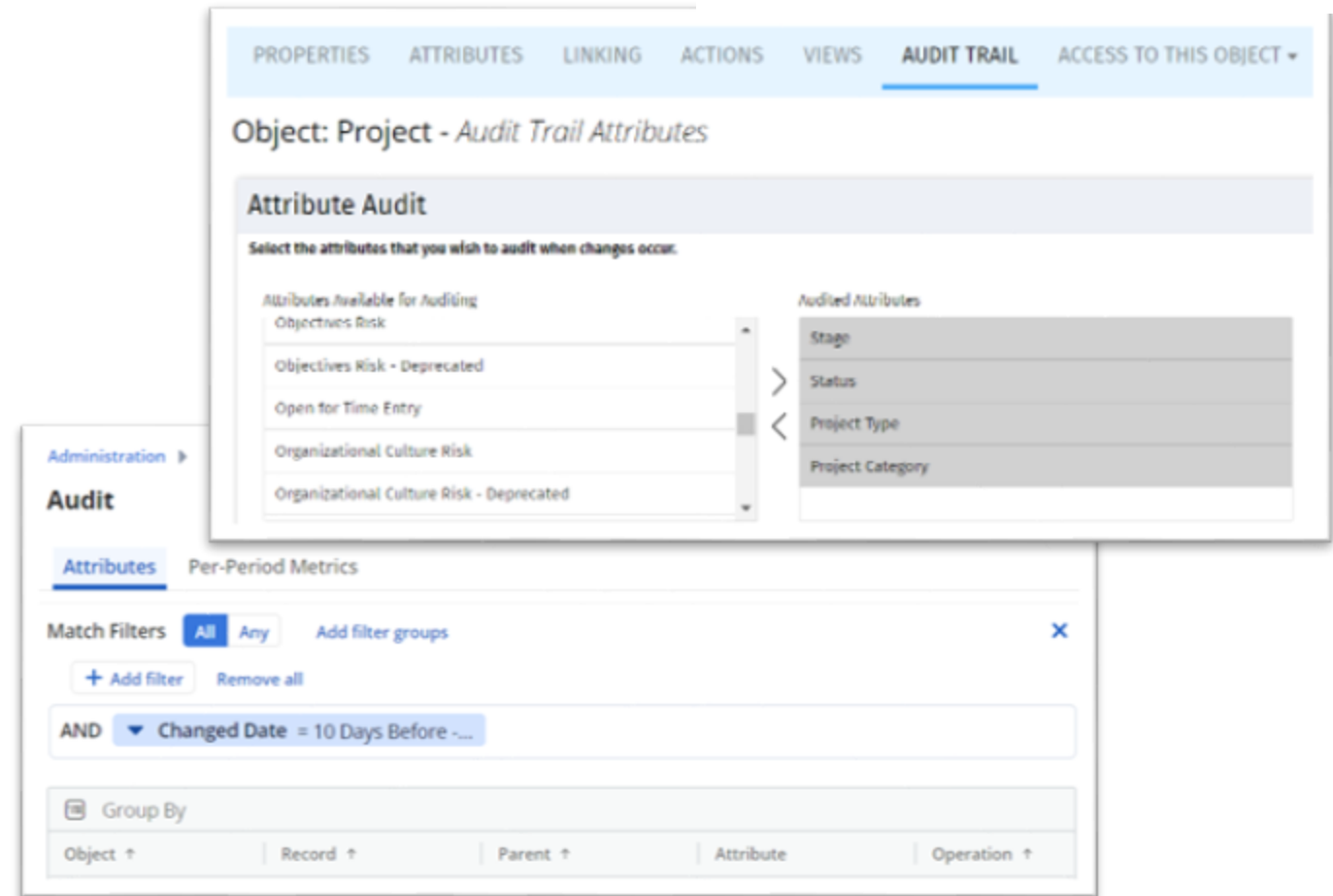
Save

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)

The screenshot shows the 'Edit Rule' interface for configuring timesheet validation rules. It includes fields for 'Rule Name' (set to '> 24hrs check') and 'Description' (set to 'Don't allow > 24hrs in a day'). Below these, a note states: 'If ALL conditions are matched Timesheet submission will be blocked, and the configured Error Message will be displayed.' The 'Error Message' field contains: 'You cannot enter more than 24hrs in a day.' Under the 'Timesheet Error Conditions' section, there are three conditions: 'Resource' (with an '+ Add condition' button), 'Time Period' (with an '+ Add condition' button), and 'Timesheet Total' (set to 'Timesheet Daily Total > 24' with an 'X' to remove it and an '+ Add condition' button). At the bottom right are 'Cancel' and 'Save' buttons.

This is a red error message box that appears when a timesheet is submitted. It contains a red triangle icon and the text: 'This timesheet cannot be submitted due to errors. Please correct the items and resubmit. You cannot enter more than 24hrs in a day.'

This screenshot shows a timesheet submission interface. At the top, there is a progress bar labeled 'TIME' at '100%'. Below it are buttons for 'Select Resource', 'Errors' (with a red triangle icon and a '1' badge), 'Submit', and '< Notes'. A red error message box is overlaid on the bottom, containing a red triangle icon and the text: 'This timesheet cannot be submitted due to errors. Please correct the following items and resubmit. You cannot enter more than 24hrs in a day.'

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

Group By

Action *	Type *	Enabled ↑	Sec ure ↑	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	It'd 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

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

View (Copy) Standard

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
<input type="checkbox"/>	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	✓
<input type="checkbox"/>	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	✓
<input type="checkbox"/>	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	✓
<input type="checkbox"/>	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	✓
<input type="checkbox"/>	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	✓
<input type="checkbox"/>	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	✓
<input type="checkbox"/>	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.

Administration ▸

Users








Search...
View (Copy) Standard View
Save

Select all Deselect all

Group By

	Last Name * 1↑	First Name * 2↑	User Name *	Resource ID *	Email Address *	Status *	Employment Type *	Force Password Change	User Groups
<input type="checkbox"/>	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
<input type="checkbox"/>	Amos	Cheryl	camos	cherylAmos	brian.toplicar@regoco nsulting.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.

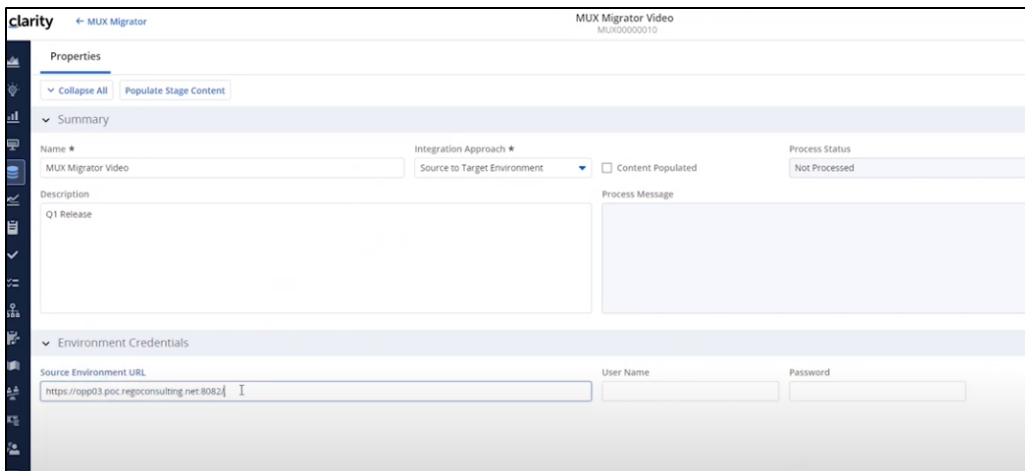
Considerations and Recommendations

-  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.



clarity MUX Migrator

MUX Migrator Video
MUX000000010

Properties

Summary

Name *
MUX Migrator Video

Integration Approach *
Source to Target Environment

Content Populated ☐

Process Status
Not Processed

Description
Q1 Release

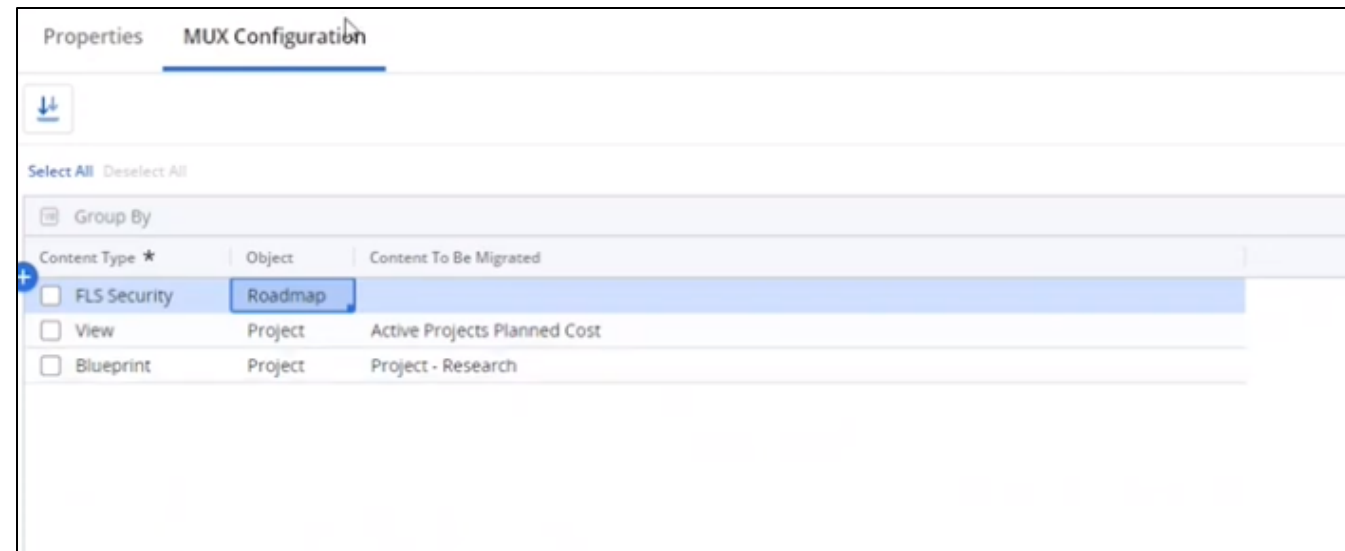
Process Message

Environment Credentials

Source Environment URL
https://app03.poc.regoconsulting.net:8082

User Name

Password



Properties MUX Configuration

Select All Deselect All

Group By

Content Type *	Object	Content To Be Migrated
<input type="checkbox"/> FLS Security	Roadmap	
<input type="checkbox"/> View	Project	Active Projects Planned Cost
<input type="checkbox"/> Blueprint	Project	Project - Research

Questions?



Surveys

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





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✓ **Eligibility:** Open to all Rego University attendees



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- 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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