LAS VEGAS

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2025

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Clarity Basics

Your Guides:
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Introductions

- Where do you work?

- What's your role?

- What area/topic would you like to learn more about?

- Anyone still exclusively on the Classic UI?

Modern UX Components

Getting to know the MUX screens and components

Reviewing the Modern UX (MUX) screen

Navigation bar

Reviewing the MUX screen

Navigation menu

Top: Navigation Bar

Notifications (Bell icon)

- Simple MUX (configurable) notifications
- Timesheet notifications
- Action Item notifications
- Queued data export notifications with attachments

Personal Menu (Avatar icon)

- Account settings
  - Profile
  - General
  - Notifications
  - Proxy
  - API key generation
- Impersonation (if admin)
- Context Help
- Logout

clarity

approve idea

Please review the idea as the status has changed. I...
Please review the idea as the status has changed. Id...

Please review this idea
Please review this idea . It is waiting for your

Settings

API Keys

Impersonate a User

About

Help

Log out
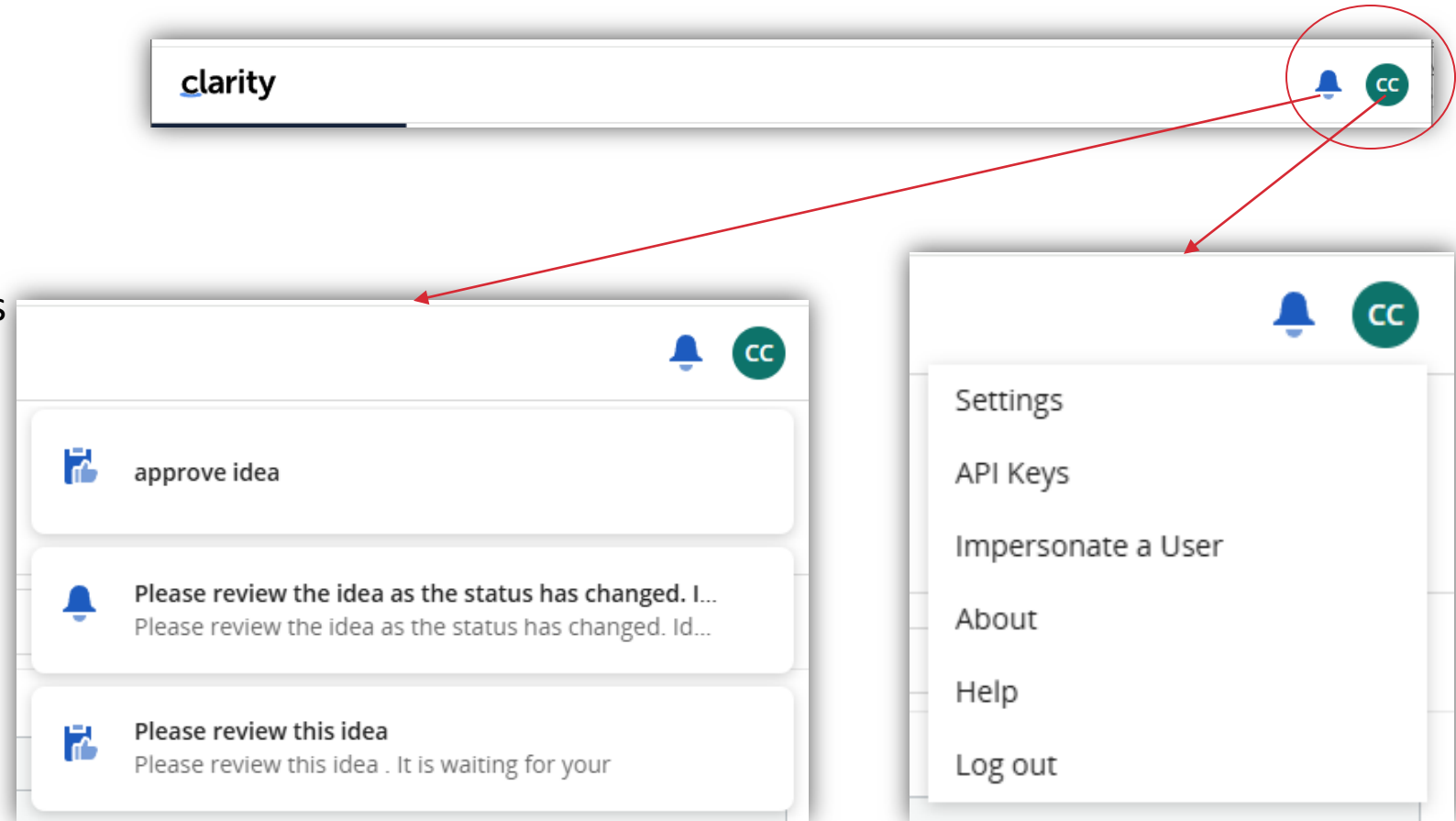
Left: Navigation Menu

Contains links to major functional areas of Clarity

Is customizable, and can be configured to have links to specific pages

- *Location: Administration -> System Settings -> Navigation Menu*

Visible menu options depend on:

1. User's level of access

2. Menu configuration

Home Page - is a configurable landing page

- *Location: Administration -> System Settings -> Home Page*

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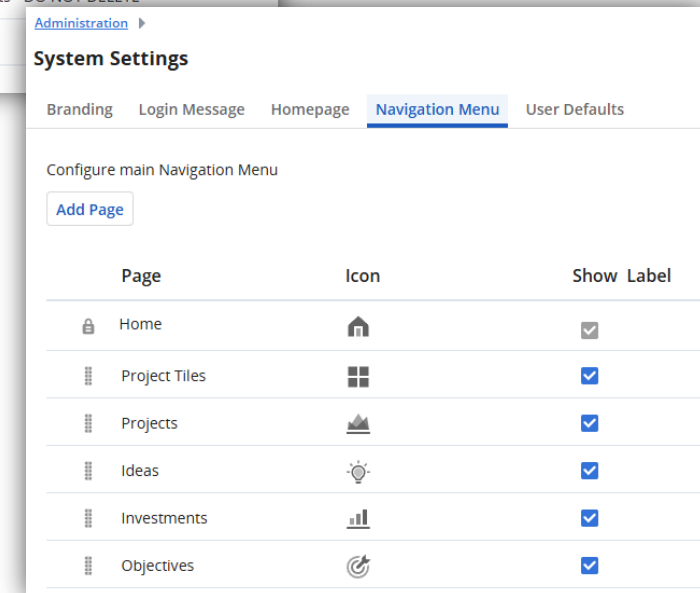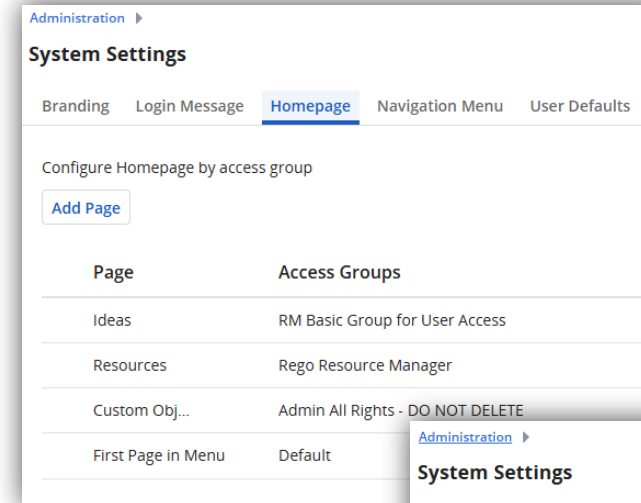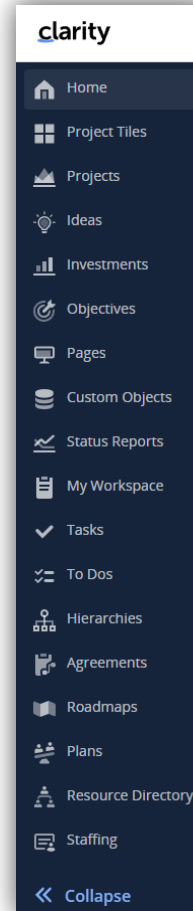
Middle: Main Screen Area

This is the frame where the loaded module or functional component will be display

A module's initial landing page is typically either:

- A Grid Layout (e.g. Projects)
- A Tile Layout (e.g. Administration) with drill-down tiles to sub-components of the module

The Common Grid

Common Grid: Action Bar

1. **Actions Menu**
   - Import / Export grid data
   - Execute Process-driven actions

2. **Template button: Invokes Create-From-Template dialogue**
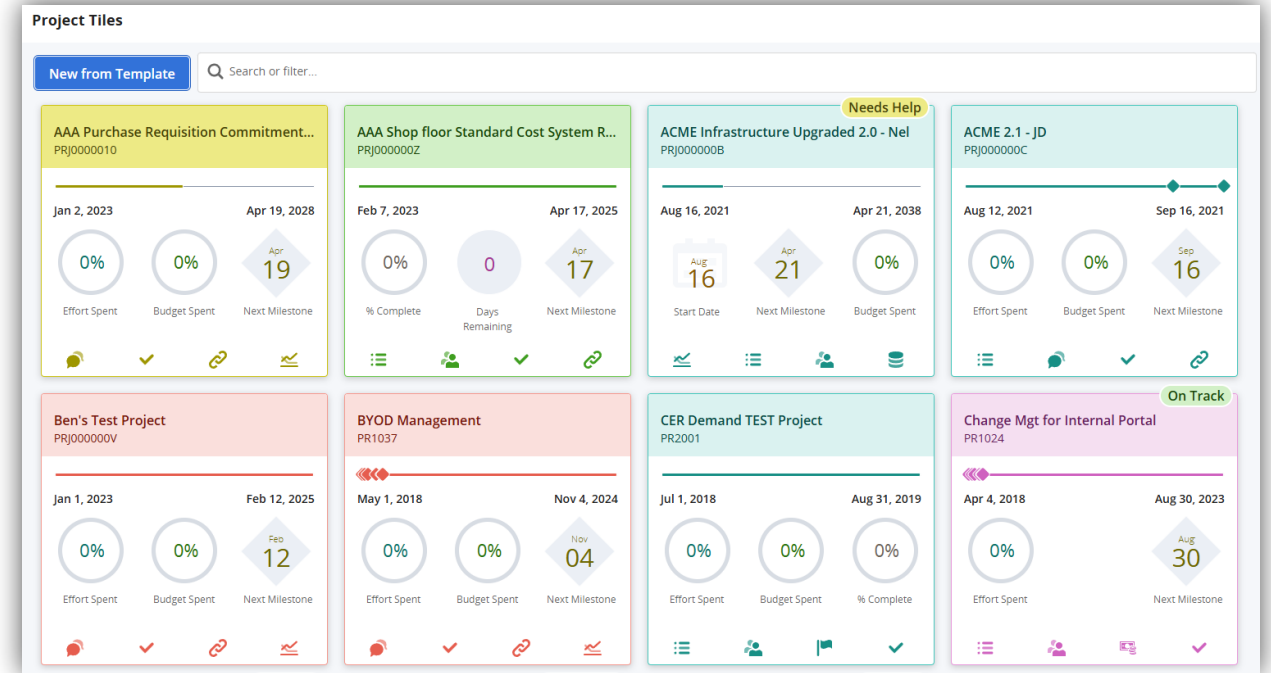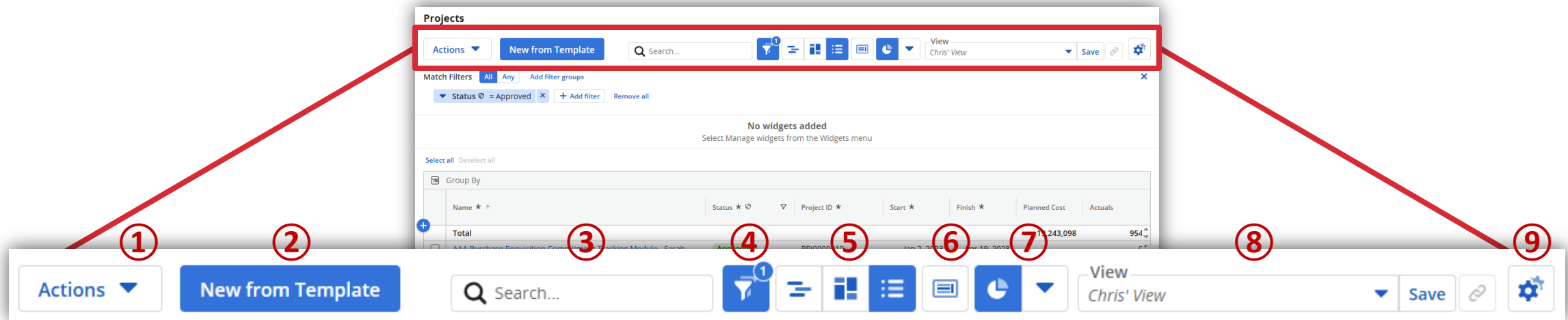
3. **Quick Search: Search by *Name* and *ID* only**

4. **Expand filter: show/hide filter options**

5. **Change view (timeline, board, grid)**

6. **Conditional Formatting**

7. **Show/Hide widgets (configurable in Blueprint)**

8. **Views: save, share, load customized grid views**

9. **View Options**
   - Configure view settings
   - Define Picklists

Common Grid: Features

- Edit and Delete multiple rows

- Copy / paste data, drag values
  - Limited to data between rows of a column when column is lookup-based

- Group by columns
  - Collapse and summarize by expandable groups

- Column sizing
  - Auto-size by data widths
  - Manual: Drag column size per column

- Shift + Click: Multi-column sorting (up to 4 columns)

- Right-click cell whitespace vs. Right-click cell hyperlink
  - Whitespace: Invokes Clarity context menu
  - Hyperlink: Invokes browser context menu

- Flyouts
  - Column: Select columns that should appear in the grid
  - Details: View a single record's details in a blueprint-like format

Common Grid: Filtering

Column filtering
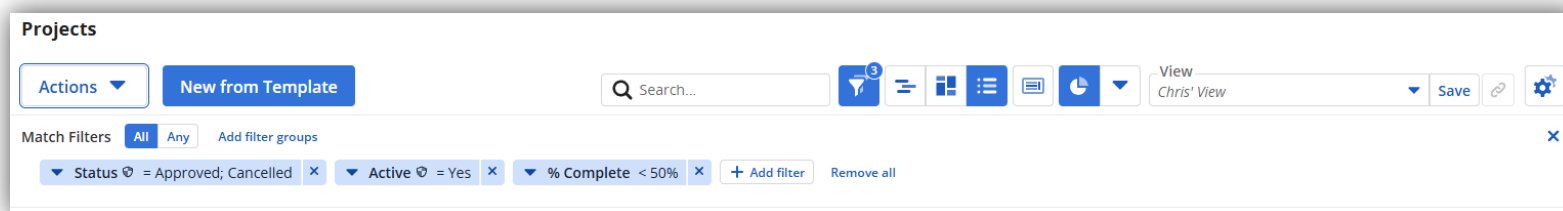
Filter groups for nested filtering rules
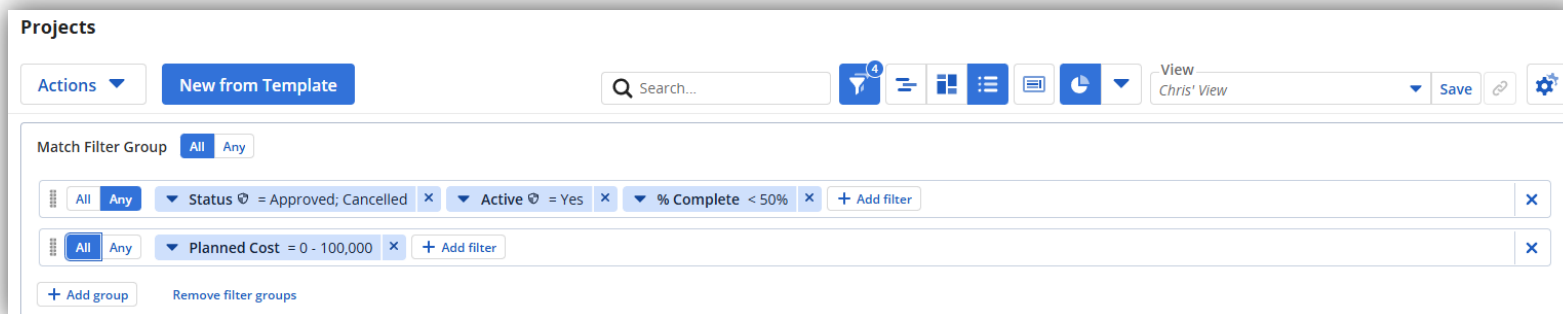
In-column filtering and aggregation
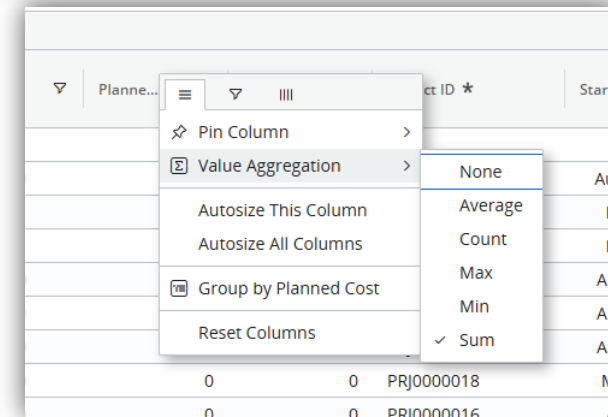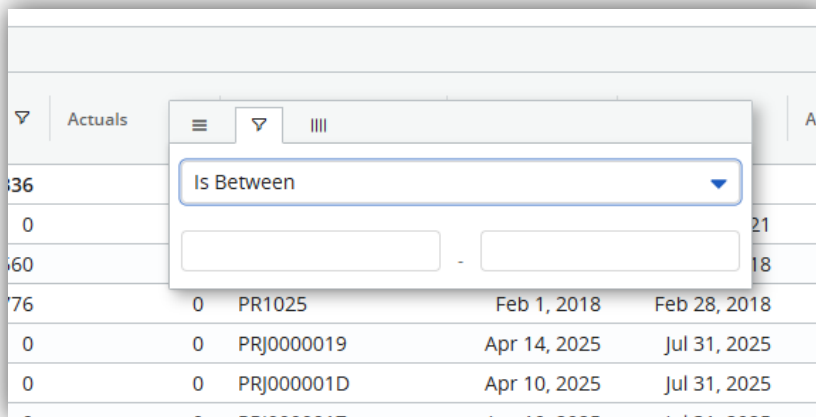
Blueprint Screens

Blueprint Screens

- Contain detailed data for a single record

- Tabs to sub-objects, channels, reports, etc.

- Based-on 6-column "Responsive" framework

- Contain expandable/collapse-able sections

- Rich Text fields contain a WYSIYG editor

- Lookup-based fields can be configured with auto-suggest values and expanded, multi-column LOVs

- Data is saved on the fly without "Save" button

- Data is refreshed on the fly (in most cases) when background processes update on-screen values

Questions?

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

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

Surveys

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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!
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