



Sponsored by  
**ValueOps™**  
by Broadcom

**Clarity™**  
by Broadcom

**Rally®**  
by Broadcom

**ConnectALL**  
by Broadcom

**Insights**  
by Broadcom

# CITs, Objects, Fields, and Lookups

**Your Guides:  
Rahul Agrawal and David Zywiec**



# Agenda

---

- Introduction
- Enabling Modern UX, Basic Configuration and Navigation
- Blueprints and Attribute Administration
- Considerations, Recommendations and Rego's MUX Migrator

# Objects, Attributes, and Views/Fields

# Objects

- ⚙️ Objects are the major functional components of Clarity
- ⚙️ Objects define the attributes (fields), subpages (links), page layout, and views that make up your configured instance of Clarity
- ⚙️ In addition to the stock objects delivered with the system, you can create custom objects. Custom objects are essentially tables inside the database that begin with “ODF\_CA”
- ⚙️ Use the default objects or create custom objects and sub-objects to manage information for specific business needs
- ⚙️ Once you create an object, add attributes, links, and actions and set up the views



# Objects



Each object has four distinct pieces you can configure

- Properties
- Attributes
- Links
- Views



Things to remember

- You can only delete Custom Attributes
- Attributes need an API Attribute ID to show in the New UX
- Adding more than 100 custom attributes to a single custom object may impact performance
- A hierarchy with a maximum of three levels of objects can be created, and allow child objects to inherit properties and access rights from parent objects

# Objects: Types



## Stock Objects







- Primary Standard Objects
  - Project
  - Task
  - Team
  - Resource
  - Company
  - Application



## Custom Objects

- Master Objects
- Sub-Objects

# Objects: Investment Object

-  The Investment object is a special component that provides the ability to define attributes one time and share them across select OOTB objects
-  These objects “inherit” attributes from the Investment object:
  - Project, Idea, Other Work, Application, Asset, Product, Service
  - Modern UX Custom Investments
-  Streamlines the creation process and ensures consistency across objects
-  You may re-label attributes on shared objects if needed (ID remains the same)
-  Attributes defined at the investment level are available to the stock objects noted above but are not required
-  You must make updates to Investment attributes **at the Investment level**

# Attributes

- ✓ Attributes are the fields on an object that store information
- ✓ The attributes of each object are available on the Attribute screen within the object
- ✓ Many attributes are delivered out-of-the-box, but you can create additional attributes using Studio
- ✓ Once created, you can organize and place attributes:
  - Classic UI: on views and portlets and use for reporting
  - Modern UX: Views and Blueprints
  - Example: “Start Date” is an attribute of the project object

Details on the various data types can be found in the Studio Developer Guide



# Attribute Data Types



When creating attributes, the following data types are available:

- String (2000-character maximum)
- Large String – Plain Text
- Large String – Rich Text
- Number
- Calculated
- Money (includes currency code)
- Boolean (checkbox)
- Date
- Lookup (related lookup needs to be available - create prior to creating attribute)
- Multi-Valued lookup (same note above applies)
- Attachment
- Time-varying
- URL (Links to actual data)
- **Rich Text (Only available in MUX)**

# Calculated Attributes

- ⚙️ A Calculated attribute displays a dynamic, read-only value
- ⚙️ Values are calculated from other existing attribute values
- ⚙️ Values are calculated every time the user accesses or refreshes the page
- ⚙️ These values **are not stored** in the database
- ⚙️ Calculated attributes can only read the following data types:
  - **Number**: Use this data type to calculate a number value like a sum or average
  - **String**: Use this data type to concatenate two or more text values
    - Example: concatenate the value of the attribute “created\_by” and the constant “2007” to produce a result of “ssmith 2007”
  - **Date**: Use this data type when you need to calculate dates using basic arithmetic or to provide the current date

**Note:** You cannot delete source attributes used in a calculated attribute!

# Attributes: Auto-Numbering

- Clarity provides the ability to create your own numbering/naming scheme for object instances (PRJnnnnnn, APPnnnnnn, etc)
- The scheme can be numeric or a mixture of characters and numbers
- Two out-of-the-box attributes that are commonly auto-numbered are “Name” and “ID”
- Configuration is done via the auto-numbering tab on the attribute detail

The screenshot shows a web-based configuration interface for an attribute. At the top, there are two tabs: 'Properties' and 'Auto-numbering', with 'Auto-numbering' being the active tab. Below the tabs, the text 'Object: AI Logger | Attribute: ID - Attribute Auto-numbering' is displayed. Underneath, there is a section titled 'General' which contains a checkbox labeled 'Auto-numbered' that is currently unchecked. Below this checkbox are three buttons: 'Save', 'Save And Return', and 'Return'. At the bottom of the interface, there is a section titled 'Schemes' which is currently empty, and a label 'Runtime Next Number' is visible on the right side of this section.

# Attributes: Exercise

- Create a new custom sub-object to the project object
  - Administration -> Objects
  - Click New and fill out the required fields

**Object Name:** Meaningful name summarizing the object function

**Object ID:** Use a standard naming convention; many start with a customer ID + “\_” (special characters and spaces should not be used in IDs)

## Master or Subobject

- Choose **Master** if object is to be standalone
- Choose **Subobject** if object is to be accessed via another object (1 to many relationship)
  - Choose the Master object by using the browse button

Create Object Definition

Object Name

Object ID

Content Source Customer

Description

Master or Subobject ☒ Master ☐ Subobject

Partition Model

Master Object

Event Enabled ☐

Copy Enabled ☐

Export Enabled ☐

View All Enabled ☐

API Enabled ☐ (Once the value is enabled, it cannot be disabled.)

Object Extension  (An object created with an extension cannot be deleted.)

# Attributes: Exercise

Select the following checkboxes if they apply:

- **Event Enabled:** Specifies that the process engine is notified of object instances that are created or updated. (If a process needs to get driven off the object).
- **Copy Enabled:** Specifies that copies can be made of the object instances.
- **Export Enabled:** Specifies that object instances can be exported to XML.
- **View All Enabled:** Specifies that the object instances can have a view containing all properties, subobject lists, and page portlets that can be personalized on a single page.
- **API Enabled:** Allows custom objects that are a sub object of projects/investments to show in the New UX.
- **Include in Datawarehouse:** Enabled the object to be available in the DWH.
- **Object Extension:** Used to create custom Investments, by associating to the Investment Object.

The screenshot shows a 'Create Object Definition' form with the following fields and options:

- Object Name:** Text input field.
- Object ID:** Text input field with a green plus icon.
- Content Source:** Dropdown menu set to 'Customer'.
- Description:** Large text area.
- Master or Subobject:** Radio buttons for 'Master' (selected) and 'Subobject'.
- Partition Model:** Text input field with a plus icon.
- Master Object:** Text input field with a plus icon.
- Event Enabled:** Checkbox.
- Copy Enabled:** Checkbox.
- Export Enabled:** Checkbox.
- View All Enabled:** Checkbox.
- API Enabled:** Checkbox with a green plus icon. Below it is the text: '(Once the value is enabled, it cannot be disabled.)'
- Object Extension:** Text input field with a plus icon. Below it is the text: '(An object created with an extension cannot be deleted.)'

At the bottom are three buttons: 'Save', 'Save And Return', and 'Return'.



# Attributes: Exercise

Notice the default fields included in the newly created object

Properties Attributes Linking A

Object: Training Object - Attributes

Attribute Name

Attribute Display All Attributes

Filter Show All Clear

<input type="checkbox"/>	Attribute	Description
	Created By	
	Created Date	
	ID	
	Last Updated Date	
	Name	
	Page Layout	Page Layout
	Partition	Code that identifies the
	Updated By	

- **Created By and Created Date:** Keep track of who and when the record was created.
- **Last Updated By and Updated By:** Keep track of the last person who updated the record and when.
- **\*\* Note:** Outside of custom objects there are OOTB jobs / processes that will skew the results of the last updated by and date fields, as the application often makes updates to the record.
- **Page Layout:** Each object defaults to a standard layout with tabs such as Properties, Processes, and Audit. This can be customized by adding a new custom page layout. (Details later on)
- **Name and ID:** Used to identify the record; Name can be repeated multiple times while the ID has to be unique. Auto-numbering is often used to force that uniqueness and standardization.

# Attributes: Exercise

Add 3 or 4 attributes of different varieties to your new custom object

- Click New and fill out required fields as well as Data Type

Attribute Name

Attribute ID   
( ID must be alphanumeric, underscore is permitted. It must not be a SQL or Clarity reserved word. )

Description

Data Type

Default Value

Maximum Size   
( The maximum size is 2000. For 3 byte Unicode the actual maximum size is 1333. )

Populate Null Values with the Default ☐

Value Required ☐

Presence Required ☐

Read-Only ☐  
( In order to make an attribute read-only a default must be selected )

API Attribute ID   
( This is the attribute id used in the REST API. Set this to make the attribute available via the REST API. )

- **Attribute Name:** Name of attribute (display name can be changed later in fields if need be)
- **Attribute ID:** Unique ID for attribute (spaces and special characters not allowed)
- **Description:** Meaningful explanation for attribute usage
- **Data Type:** Type of attribute
- **Lookup:** Only shows up for “Lookup” and “Mutli Valued Lookup” types
- **Default:** Default value to populate attribute with ( if applicable)
- **API Attribute ID:** Required for field to show in New UX. Only available if Object is API Enabled

# Attributes: Exercise



Select the following checkboxes if they apply:

- **Populate Null Values with the Default:** If an attribute is added after instances have already been created, this will populate the existing records with the default value.
- **Value Required:** Specifies whether a value is required for the attribute.
- **Presence Required:** Specifies that the attribute always appears in the Edit Properties view.
- **Read-Only:** Specifies that a user cannot make changes to the value in the attribute.
- **Include in the Datawarehouse:** Include the field in the DWH schema.
- **Attribute API Alias:** Alias to enable the attribute through REST API.

Populate Null Values with the Default ☐

Value Required ☐

Presence Required ☐

Read-Only ☐

( In order to make an attribute read-only a default must be selected )

Save Save And Return Return

\* = Required → = Enter Once \* = Unique

# Attributes: Exercise

## Auto-number the ID attribute

- Select the auto-numbering tab
- Check the “Auto-numbered” box and click “Save”
- Select Scheme -> Edit

Properties Auto-numbering

Object: Training Object | Attribute: ID - Attribute Auto-numbering

General

Auto-numbered ☒

Save Save And Return Return

Schemes

Partition: System ▼

Partition	Runtime Next Number	Scheme
System	00000001	[Edit]

# Attributes: Exercise

- The default segment type is numeric, but this can be modified to include text characters as well.

Object: Training Object | Attribute: ID | Partition: System - Auto-numbering Scheme

General Information

Scheme Name

System Default

Partition

System

Next Number

00000001

Status

Active

Segments

<input type="checkbox"/>	Type of Segment	Text Value	Counter Starting Number	Counter Length	Auto-extended
<input type="checkbox"/>	Numeric Counter		00000001	8	✓

New

✓ Delete

Reorder

Save

Save And Return

Return

Required

- Select “New” and set Type of Segment = “Text” and type the text value into “Value” field.
- Click Save and Return.

Segment Properties

Type of Segment

Text

Value

TRN

Save And Return

Return



# Attributes: Exercise

Object: Training Object | Attribute: ID | Partition: System - Auto-numbering Scheme

**General Information**

\* Scheme Name: System Default

Partition: System

Next Number: 00000001TRN

Status: Active

Note the new numbering scheme

**Segments**

Type of Segment	Text Value	Counter Starting Number	Counter Length	Auto-extended
<input type="checkbox"/> Numeric Counter		00000001	8	<input checked="" type="checkbox"/>
<input type="checkbox"/> Text	TRN		3	

New Delete Reorder Save Save And Return Return

- The new scheme defaults into the order it was entered. To reorder to have the text in front select “Reorder” and move the segments accordingly.
- Select “Save and Return.”

Reorder Auto-numbering Scheme Segments




Scheme Segments

Text(Next Value: TRN)

Numeric Counter(Next Value: 00000001)

Save Save And Return Return

# Fields and Views

-  Fields are representations of the available attributes which are placed onto screens and list views
-  Field names can be different than the attribute (relabeled)
-  They provide additional options and allow flexibility in view configuration:
  - Browse vs Pull-Down (for lookups)
  - Hints and Tooltips
  - Size of the field on the screen and text boxes
  - Default value
  - Required (even if NOT required on the attribute definition)
  - List alignment
  - List column width
  - List word wrapping

Properties	Attributes	Linking	Actions	Views	Audit Trail	Access to this Object ▾
Object: Project - Views						
View	Category	Setup				
Project Properties	Properties	[Layout: Create]	[Layout: Edit]	[Actions Menu]		[Fields]
Program Properties	Properties	[Layout: Create]	[Layout: Edit]	[Actions Menu]		[Fields]
Project List	List Column	[Layout]	[Options]	[Aggregation]	[Actions Menu]	[Fields]

# Fields: Adding to a Screen

Fields can be added or removed on the Create and Edit screens

Properties	Attributes	Linking	Actions	Views	Audit Trail	Access to this Object ▾
Object: Project - Views						
View	Category	Setup				
Project Properties	Properties	[Layout: Create]	[Layout: Edit]	[Actions Menu]	[Fields]	
Program Properties	Properties	[Layout: Create]	[Layout: Edit]	[Actions Menu]	[Fields]	
Project List	List Column	[Layout]	[Options]	[Aggregation]	[Actions Menu]	[Fields]

Page > Section	Level
[-] [Create Asset Properties]	Page
[+] General	Section
[+] Detail	Section
[+] Attachements	Section
[+] OBS	Section
Create Sections   Delete   Return	

Page > Subpage	Level
[-] [Edit Asset Properties]	Page
[+] Asset Summary	Subpage
[+] Schedule & Performance	Subpage
[+] Alignment & Risk	Subpage
[+] Financial Summary	Subpage
[+] Compliance	Subpage
[+] Settings	Subpage
Create Subpages   Delete   Return	

# Fields: Adding to a List

Fields can also be added or removed on the List view

Properties	Attributes	Linking	Actions	Views	Audit Trail	Access to this Object ▾
Object: Project - Views						
View	Category	Setup				
Project Properties	Properties	[Layout: Create] [Layout: Edit] [Actions Menu]				[Fields]
Program Properties	Properties	[Layout: Create] [Layout: Edit] [Actions Menu]				[Fields]
Project List	List Column	[Layout]	[Options]	[Aggregation]	[Actions Menu]	[Fields]

Column Layout

Available Columns

Actuals for Labor Resources  
Actuals Sum for Labor Resources  
Alignment  
Architectural Fit  
Billing Currency Code  
Blueprint  
Blueprint Active ID  
Board Plan  
BTM Integration  
Budgeted Benefit

Selected Columns

ID  
Compliance  
Value Metrics  
Gray Bar  
Related Idea  
Approved Flag  
Status  
Progress  
Start  
Finish

# Fields: List Options

Consider the following List view options to improve the user experience:

- Rows per Page
- Allow Configuration
- Filter results

Properties	Attributes	Linking	Actions	Views	Audit Trail	Access to this Object ▾
Object: Project - Views						
View	Category	Setup				
Project Properties	Properties	[Layout: Create]	[Layout: Edit]	[Actions Menu]	[Fields]	
Program Properties	Properties	[Layout: Create]	[Layout: Edit]	[Actions Menu]	[Fields]	
Project List	List Column	[Layout]	[Options]	[Aggregation]	[Actions Menu]	[Fields]

Display Options

Secondary Value Display
☒ Mouseover only
☐ Mouseover and redline text  
( Used when any list column field displays a secondary value )
☐ Show Null Secondary Values

Filter
☒ Automatically show results
☐ Do not show results until I filter

Rows per Page
50 ▾

Highlight Row by Attribute
Approved Flag ▾  
( A row will be highlighted when this attribute is not zero )

Display Currency Code in Column
☐  
( Applies when only a single currency is active )

Allow Configuration
☒

Allow Label Configuration
☒

Attribute Value Protection
☒ Use display conditions and secured subpages to protect attribute values on this list
☐ Use only secured subpages to protect attribute values on this list
☐ Display all attribute values on this list



# Fields: Exercise

Use the new object do the following:

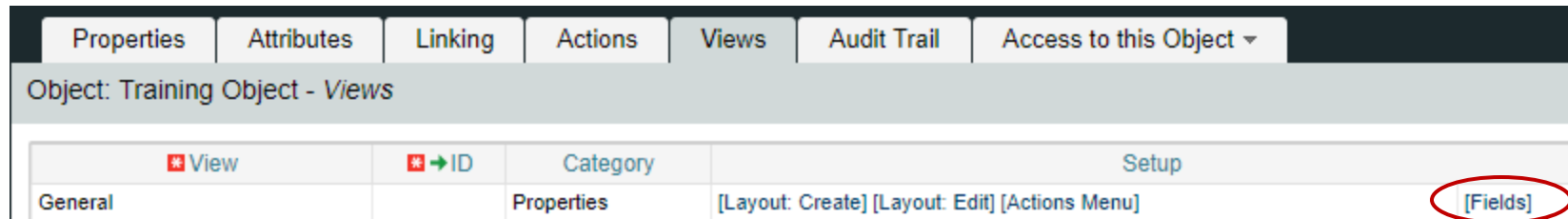
- Modify field “ID” to make read-only
  - Navigate to Administration -> Objects -> <Object Name> -> Attributes
- Select the ID field and open. Set a default value. Click Save and Return.

The screenshot shows a web interface with two tabs: 'Properties' and 'Auto-numbering'. The 'Auto-numbering' tab is active. Below the tabs, the text 'Object: Training Object | Attribute: ID - Object Attribute' is displayed. The main content area contains a list of attributes with the following details:

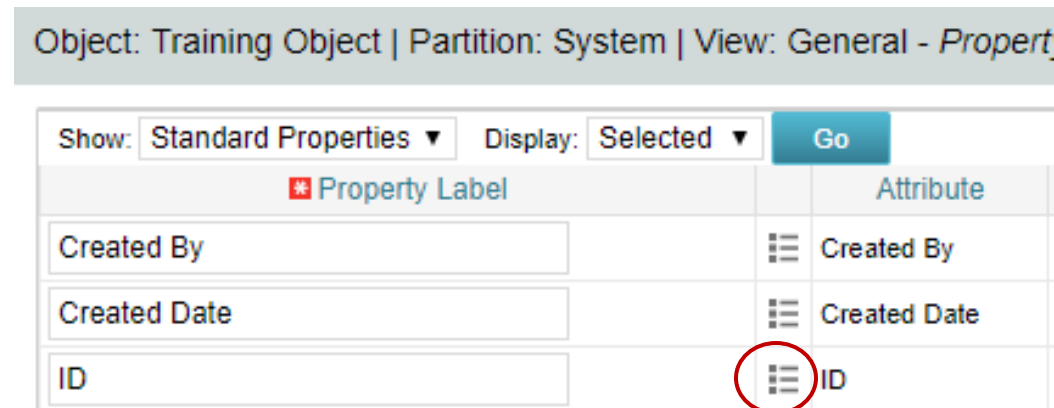
Attribute Name	ID
* → * Attribute ID	code
Description	
→ Data Type	String
Default Value	TRN00000

# Fields: Exercise

- Select “Views” tab
- On the General -> Properties line click the “Fields” link




- Click on the properties icon next to the “ID” field



# Fields: Exercise

Select the “Hidden” checkbox

Object: Training Object | Partition: System | View: General - *Property Field*

Attribute	code
Data Type	String
Property Label	ID 
Display Type	Text Entry ▼
Hint	<input type="text"/>
Hint Position	Below ▼
Tooltip	<input type="text"/>
Attribute Default	TRN00000
Override Default Value	<input type="text"/>
Width	20 <input type="text"/>
Value Required	<input checked="" type="checkbox"/>
Enter Once	<input type="checkbox"/>
Hidden	<input type="checkbox"/>

( In order to make a property field hidden a default must be selected. )

# Fields: Exercise

Make one of the new attributes “Required” within the field properties

- Navigate to Administration -> Objects -> <Object Name> -> Attributes
- Select a field (newly created) and open properties.
- Select the “Value Required” checkbox and click “Save.”

Object: Training Object | Attribute: Description - *Object Attribute*

Attribute Name	Description
Attribute ID	v_desc
Description	
Data Type	String
Default Value	
Maximum Size	2000
	( The maximum size is 2000. For 3 byte Unicode the actual maximum size is 1333. )
Populate Null Values with the Default	<input type="checkbox"/>
Value Required	<input checked="" type="checkbox"/>

# Fields: Exercise

Add a hint for entering one of the values and place it below the field.

- Navigate to Administration -> Objects -> <Object Name> -> Views
- From the General -> Properties line click on “Fields”
- Choose a field that you want to add some verbiage to help the user when entering information.
- Add verbiage to the “Hint” text box and choose a position.

Object: Training Object | Partition: System | View: General - *Property Field*

Attribute	name
Data Type	String
* Property Label	<input type="text" value="Name"/>
Display Type	Text Entry ▼
Hint	<input type="text" value="Enter the name"/>
Hint Position	Below ▼



# Actions



Object actions are individual operations that can be selected to be done from either the list or properties view within an object instance

- Examples of actions are the ability to run a report (only Business Objects), initiate a process instance, copy an object instance, etc.



Each object has some default actions available to them



To utilize an action the action menu needs to be configured





- Within an object this is located within the “Views” tab and by clicking on “Actions Menu” for the specific view being configured



Actions and the associated menus can be renamed as needed

# Studio and Modern UX

# Administration in the Modern UX

-  The Modern UX Administration is more functional than technical. It can be managed by any user with a good functional understanding of Clarity.
-  While some administration activities are done in the Classic Clarity UX, others are available only in the Modern UX.
-  Administrators must have a good understanding of what they want to expose and to whom they wish to make functionality available to make best use of the Classic and New functionality.
-  Studio Objects and Attributes are available in the Modern UX, they only need an API Field ID to be configured.

# Enabling Attributes for the Modern UX

- For custom attributes to be able to be viewable/editable in the Modern UX, their API Attribute ID must be populated.
- Access your custom attributes on the object to which they belong, and populate this value to ensure the attributes may be utilized in the Modern UX.
  - Go to Administration -> Objects -> Select the appropriate object
  - Select Attributes Tab
  - Select Desired Attribute
  - Populate API Attribute ID and **Save**.

The screenshot shows the 'Clarity PPM' Administration interface. The top navigation bar includes 'Home', 'Administration', and 'Favorites'. The main header indicates the current context: 'Object: Project | Attribute: Project Kickoff Meeting Complete - Object Attribute'. The 'General' tab is selected, displaying various configuration fields for the attribute 'Project Kickoff Meeting Complete'. The 'Attribute ID' is 'huss\_pk' and the 'Data Type' is 'Lookup - Number'. The 'Lookup' is set to 'Yes or No'. The 'API Attribute ID' field, which is highlighted with a red box, contains the value 'PKMeeting'. Below this field, a note states: '( This is the attribute id used in the REST API. Set this to make the attribute available via the REST API. )'. Other fields include 'Description', 'Default', and several checkboxes for 'Populate Null Values with the Default', 'Value Required', 'Presence Required', 'Read-Only', 'Include in the Data Warehouse', and 'Include in the Data Warehouse Trending'.

**Note:** API-Enable OBS attributes for them to be utilized in filters, views, etc.



# Basic Components Modern UX

- Blueprints
  - Modules
  - Views
  - Channels
  - Actions
  - Business Rules
- Field Level Security
- Pages (Dashboards)
- User Personalization
  - Views
  - Picklists



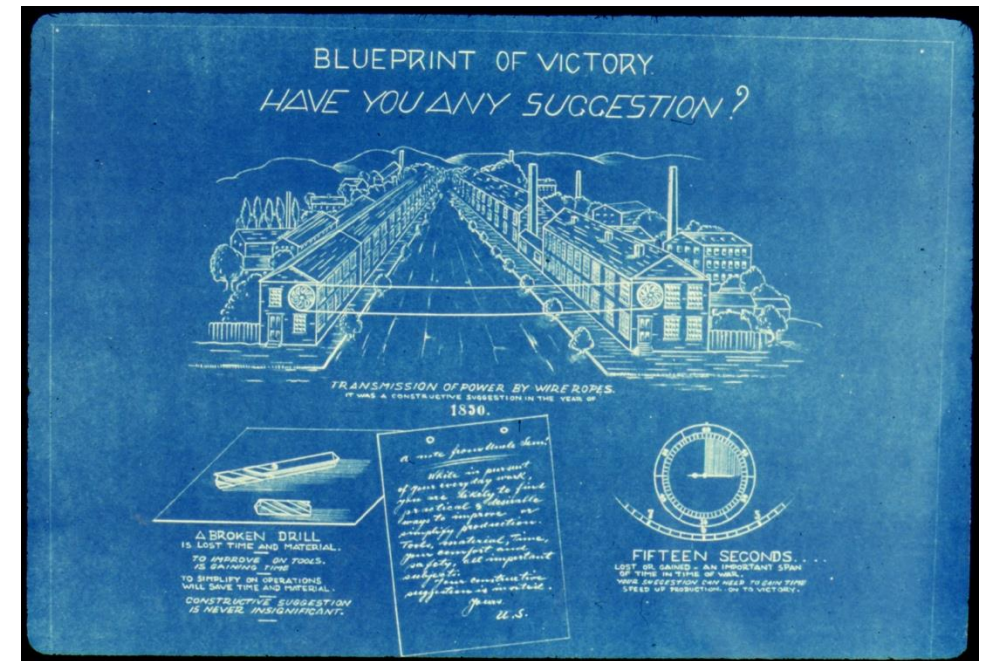
# Blueprints

---

- Blueprints
  - Modules
  - Views
  - Channels
  - Actions
  - Business Rules

# Overview

- Blueprints are configurable layouts in the New User Experience
- Blueprints can be used (might vary depending on version):
  - Projects
  - Ideas
  - Custom Investments
  - Custom Objects
  - Hierarchy
  - Roadmaps
  - Agreements
  - Pages



# Overview

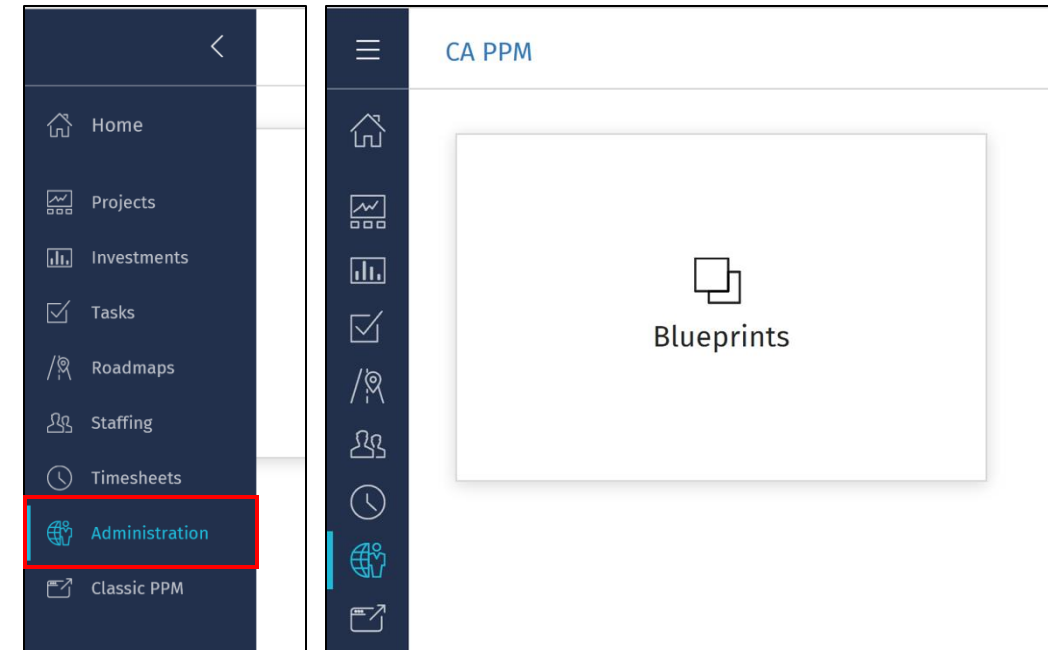
- Depending on the Blueprint type options might vary, but in general Blueprints can:
  - Allow admins to customize the look and feel of Edit Views, Add Modules, Add Channels
  - Impact how certain investments are created from templates
  - Implement Rules to enforce validations like required fields in Objects and Subobjects (16.0.3)
  - Configure Actions to run processes within MUX

# Configuring Blueprints



# Navigation

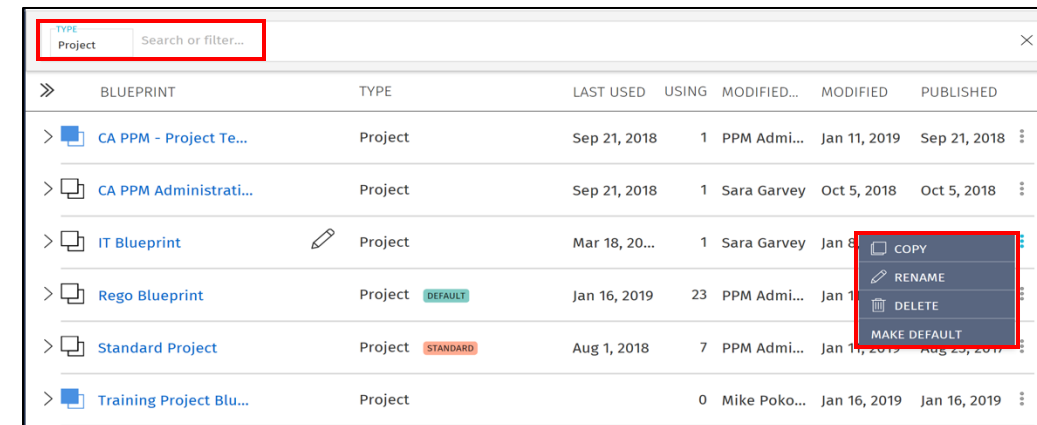
- To have the ability to view and update Blueprints a user requires the following security rights
    - Blueprint – Create Copy, Blueprint - Delete – All, Blueprint – Edit – All, and/or Blueprint – View – All
1. Once in the New User Experience, Click on the 'Administration' Icon
  2. Click on the 'Blueprints' tile
    - Here you will see the list of Blueprints create in the system





# Blueprint List View

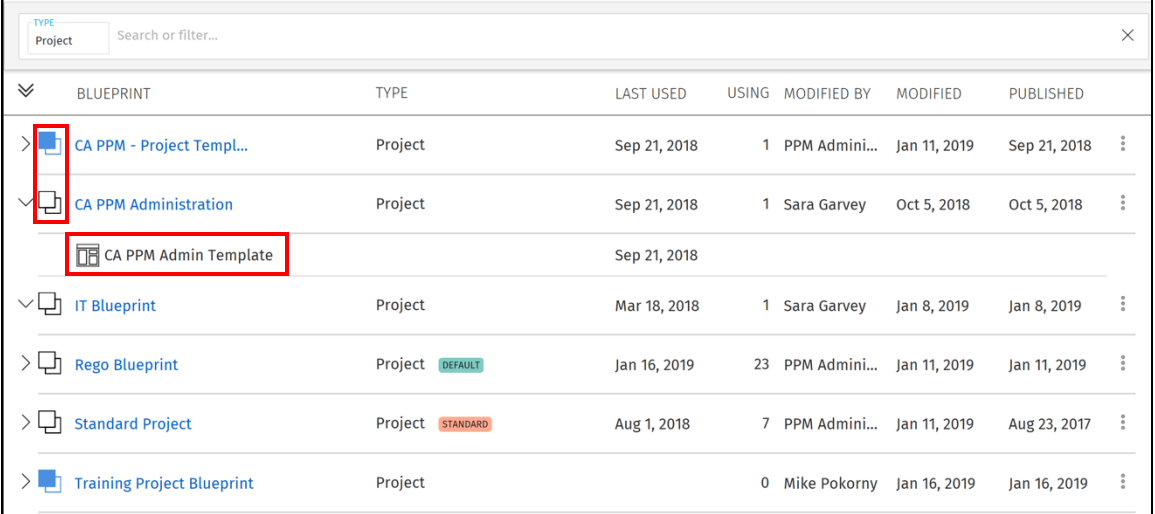
- Here you will see a list of the Blueprints that have been created in the system
  - The list is filterable; can filter by Blueprint type (e.g., Idea vs. Project vs. Custom Investments)
- There are multiple options for a Blueprint
  - Copy – Create a new Blueprint which is a one for one copy
  - Rename – 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










BLUEPRINT	TYPE	LAST USED	USING	MODIFIED...	MODIFIED	PUBLISHED
> CA PPM - Project Te...	Project	Sep 21, 2018	1 PPM Admi...	Jan 11, 2019	Sep 21, 2018	
> CA PPM Administrati...	Project	Sep 21, 2018	1 Sara Garvey	Oct 5, 2018	Oct 5, 2018	
> IT Blueprint	Project	Mar 18, 20...	1 Sara Garvey	Jan 8		
> Rego Blueprint	Project <span>DEFAULT</span>	Jan 16, 2019	23 PPM Admi...	Jan 1		
> Standard Project	Project <span>STANDARD</span>	Aug 1, 2018	7 PPM Admi...	Jan 1, 2019	Aug 23, 2017	
> Training Project Blu...	Project		0 Mike Poko...	Jan 16, 2019	Jan 16, 2019	

# Blueprint List View cont.

- Next to the Blueprint name are Blue or White Boxes which indicate if the Blueprint has unpublished changes
  - Blue – Unpublished Changes
  - White – Published
- Nested under each Project Blueprint are the Templates that have been associated to it
  - This association is changed by simply dragging and dropping the template
- Templates marked as Standard may not be edited. To edit them, first make a copy.



BLUEPRINT	TYPE	LAST USED	USING	MODIFIED BY	MODIFIED	PUBLISHED
>  CA PPM - Project Templ...	Project	Sep 21, 2018	1	PPM Admini...	Jan 11, 2019	Sep 21, 2018
✓  CA PPM Administration	Project	Sep 21, 2018	1	Sara Garvey	Oct 5, 2018	Oct 5, 2018
<div>  CA PPM Admin Template         </div>		Sep 21, 2018				
✓  IT Blueprint	Project	Mar 18, 2018	1	Sara Garvey	Jan 8, 2019	Jan 8, 2019
>  Rego Blueprint	Project <span>DEFAULT</span>	Jan 16, 2019	23	PPM Admini...	Jan 11, 2019	Jan 11, 2019
>  Standard Project	Project <span>STANDARD</span>	Aug 1, 2018	7	PPM Admini...	Jan 11, 2019	Aug 23, 2017
>  Training Project Blueprint	Project		0	Mike Pokorny	Jan 16, 2019	Jan 16, 2019

# Properties Tab

- On Project Blueprints, there are 3 main concepts that can be edited. We will go more in-depth later on these topics.
  - Details – This is the main details or properties page for the Project/Custom Investment Type. Here you can add or remove fields and sections. You can also move and resize fields by dragging and dropping them.
  - Visuals – These are the icons on the Project Tiles. There can be a maximum of 3, but there is a minimum of 1 required. Currently, these are only available for the Project Blueprints.

The screenshot displays the 'Training Project Blueprint' interface. At the top, there's a header with 'CA PPM' and 'Training Project Blueprint'. A navigation bar below the header contains three tabs: 'DETAILS' (highlighted with a red box), 'VISUALS', and 'MODULES'. To the right of the tabs, it says 'Published: Jan 16, 2019' and an 'EDIT' button (also highlighted with a red box). The main content area is divided into sections. The first section is 'PROJECT SUMMARY', which contains several input fields: 'PROJECT NAME \*', 'PROJECT ID \*', 'PROJECT TYPE', 'WORK STATUS', 'START \*', and 'FINISH \*'. Below these is an 'OBJECTIVE' field. The second section is 'STAKEHOLDERS', which includes fields for 'MANAGER' and 'SPONSOR'. A vertical sidebar on the left contains various icons for navigation.

# Properties Tab

- Modules – These are the supporting “pages” that can be added or removed from the Project. The modules include functionality like Financials, Teams, Risk, Issues, Changes, etc. Currently, these are only available for Project Blueprints.
- By clicking the Edit button, you will be taken Edit Mode where you will be able to modify the different Blueprint topics.

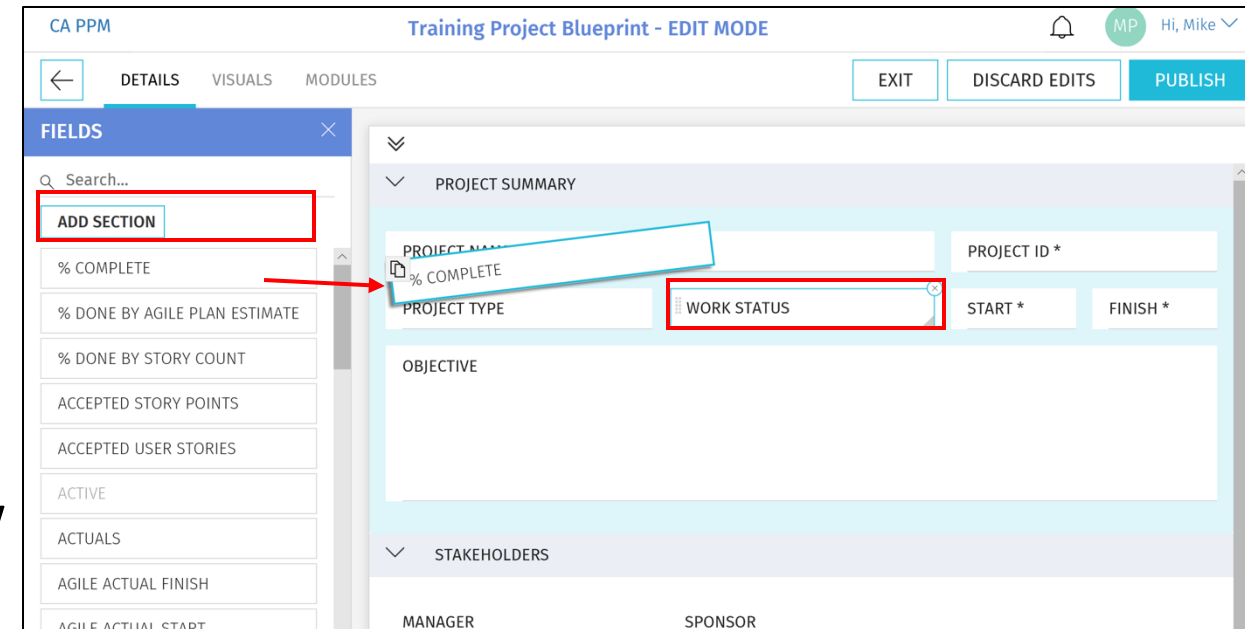
The screenshot shows the 'Training Project Blueprint' interface. The top navigation bar includes 'CA PPM', 'Training Project Blueprint', a bell icon, a user profile 'MP Hi, Mike', and a published date 'Published: Jan 16, 2019'. The 'DETAILS' tab is selected, with 'VISUALS' and 'MODULES' also visible. The 'EDIT' button is highlighted in red. The main content area is divided into sections: 'PROJECT SUMMARY' and 'STAKEHOLDERS'. The 'PROJECT SUMMARY' section contains the following fields:

PROJECT SUMMARY	
PROJECT NAME *	PROJECT ID *
PROJECT TYPE	WORK STATUS
START *	FINISH *
OBJECTIVE	

The 'STAKEHOLDERS' section is partially visible at the bottom, showing fields for 'MANAGER' and 'SPONSOR'.

# Details

- Fields Pane
  - Location of the fields you can add to the sections of your Details
    - By default, it contains a list of out-of-the-box Project and Investment fields
    - Custom fields and sub-objects can be added and will be covered later
- Fields that already exist on your Blueprint are greyed out
- Click the Add Section button to add a new section to the Details

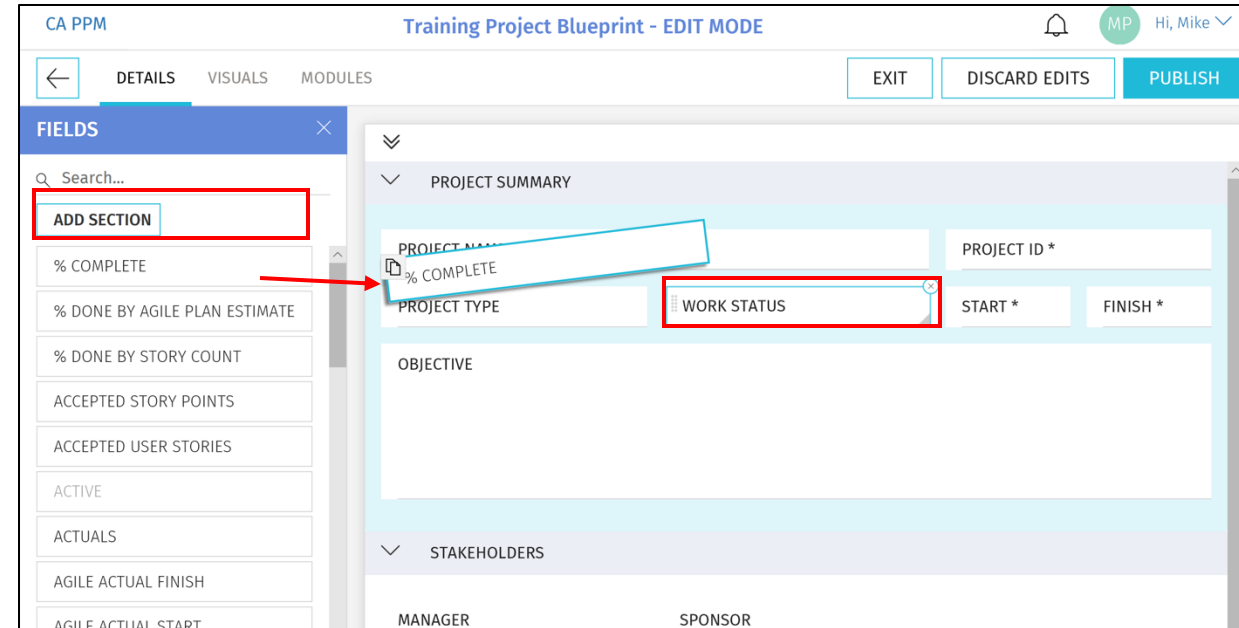


**Note:** The following attribute types are not compatible with the New User Experience: Custom Time-Scaled Value (TSV), Attachments, and URLs



- Fields

- 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 types are not compatible with the New User Experience: Custom Time-Scaled Value (TSV), Attachments, and URLs

# Details

- Details Options
  - **Exit:** Allows you to save your changes without Publishing the new view to Users
  - **Discard Edits:** Removes the change you have made
  - **Publish:** This Publishes the new view the users for the Projects associated to this Blueprint

CA PPM Training Project Blueprint - EDIT MODE

← DETAILS VISUALS MODULES

EXIT DISCARD EDITS PUBLISH

FIELDS

Q Search...

ADD SECTION

% COMPLETE

% DONE BY AGILE PLAN ESTIMATE

% DONE BY STORY COUNT

ACCEPTED STORY POINTS

ACCEPTED USER STORIES

ACTIVE

ACTUALS

AGILE ACTUAL FINISH

AGILE ACTUAL START

PROJECT SUMMARY

PROJECT NAME

PROJECT ID \*

% COMPLETE

PROJECT TYPE

WORK STATUS

START \*

FINISH \*

OBJECTIVE

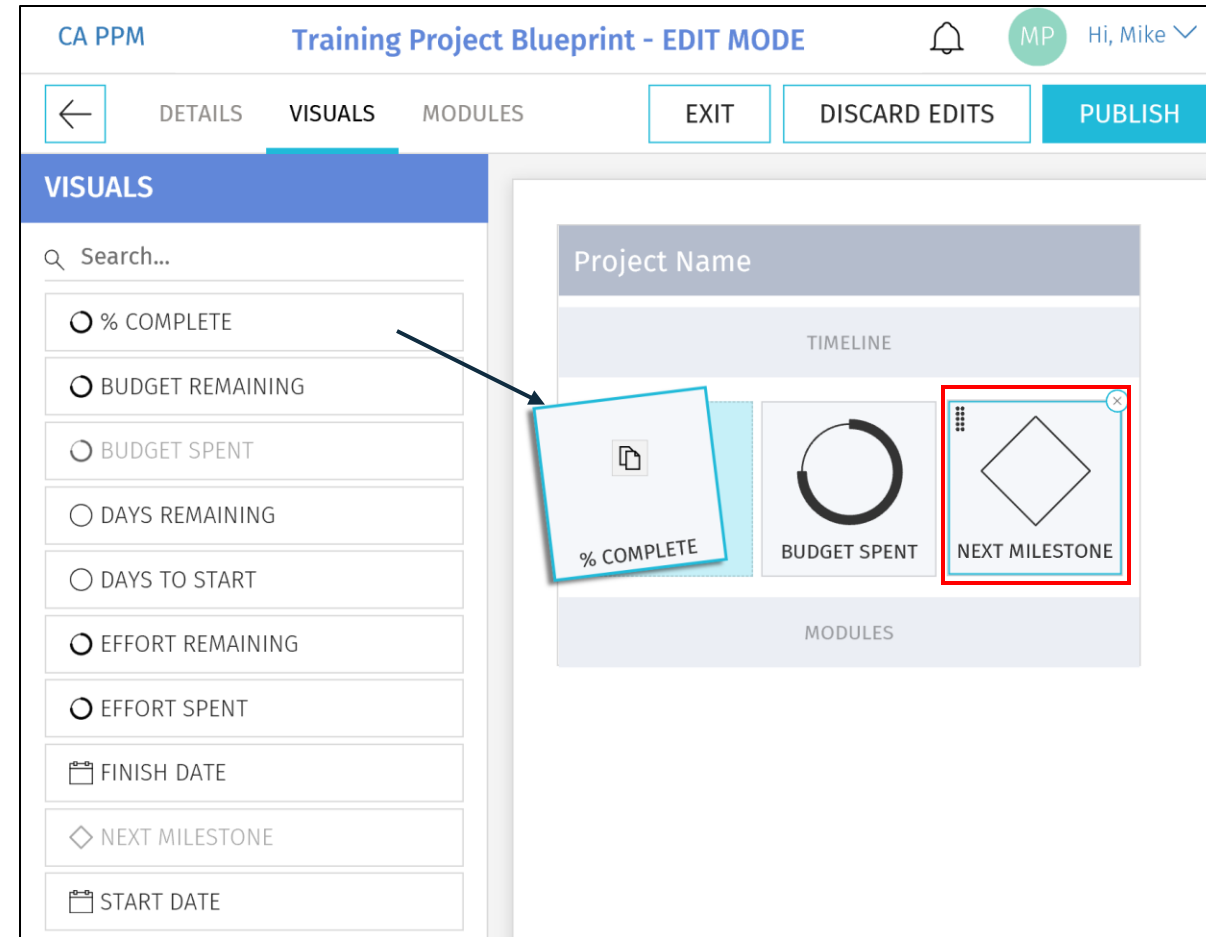
STAKEHOLDERS

MANAGER

SPONSOR

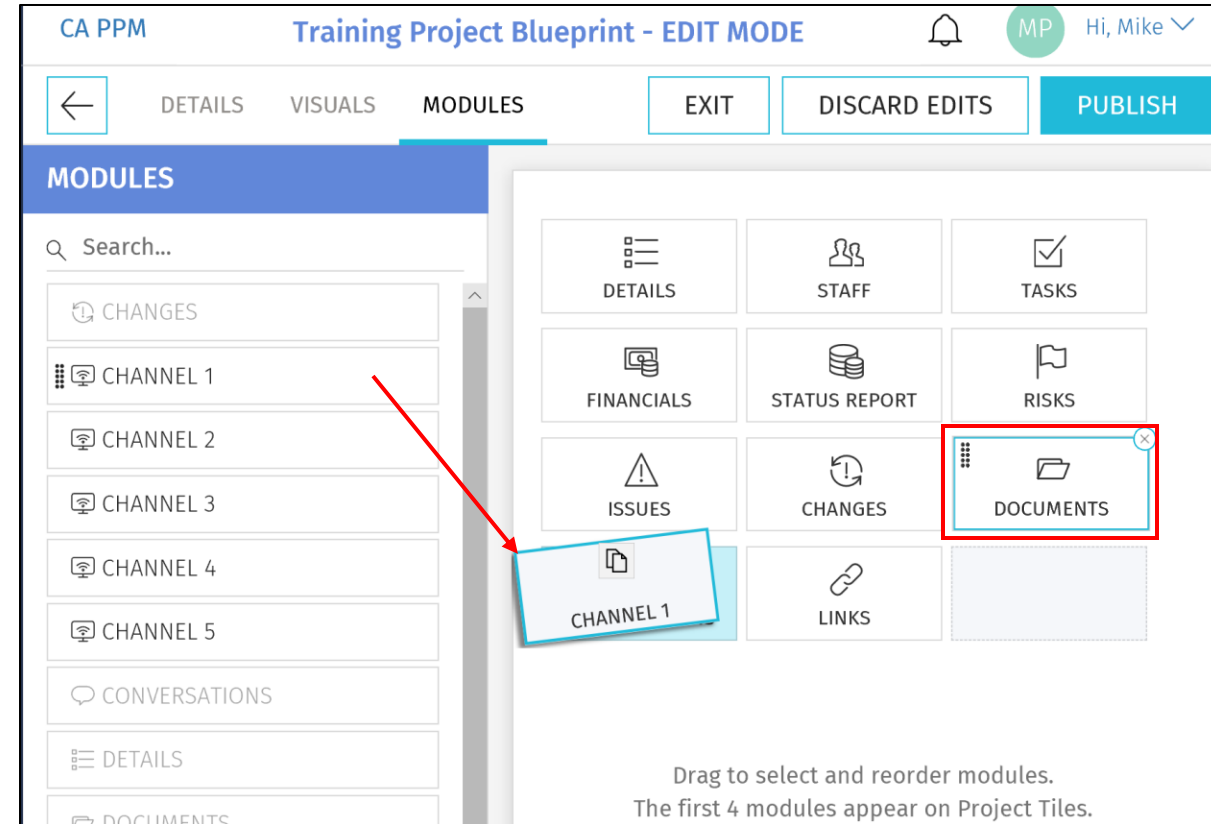
# Visuals (Projects Only)

- Visuals are displayed on the Project Tiles
- Currently, there are 10 out-of-the-box Visuals to choose from
- Add or Move a Visuals by simply dragging and dropping it
- Remove a Visual by clicking the X in the top right-hand corner of the icon



# Modules

- Once inside of a Project, Modules are displayed across the top
- The first 4 Modules will also be displayed on the Project Tile for direct navigation to that Module
- There are 12 core Modules which are not configurable and provide project functionality like financials, team, task, etc.
- In addition to the core Modules, there are configurable Channels and the ability to add custom sub-objects



# Modules – Channels

- Channels are configurable Modules that can be directed to other internal PPM locations, external applications, or external URLs
- Users can stay directly in their Project and get the additional pertinent information
- Configuration
  - Channel Name – The name displayed to the user
  - Channel URL – The URL where the channel will navigate
  - Referrer URLs – These are additional URLs need for navigation like authentication
- The URL fields accept various parameters to send as query strings to other apps and/or options to interact with the Classic UI

The screenshot displays the CA PPM interface. The top section shows the 'ACME Project' with a navigation bar including STATUS, STATUS REPORT, SHAREPOINT, CLASSIC PPM, SMARTSHEET, and POWERBI REPO... The main area shows a 'Project Plan' for 'smartsheet' with a table of tasks and a Gantt chart. The bottom section shows the 'Training Project Blueprint - EDIT MODE' with a 'MODULES' list and a 'Configure - Smartsheet' dialog box. The dialog box contains the following fields:

Field	Value
CHANNEL NAME *	Smartsheet
CHANNEL URL *	https://app.smartsheet.com/b/publish?EQBCT=xxxxxxxxxxxx
REFERRER URLS	Comma Separated



# 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

The screenshot displays the Rego system configuration interface. The top section, titled 'Subobject', shows a 'Master Object' dropdown set to 'Project'. Below this are several 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 these checkboxes are 'Save' and 'Save And Return' buttons.

The bottom section, titled 'Object: Test Sub Object - Properties', shows the 'Object Name' as 'Test Sub Object' and the 'Object ID' as 'test\_sub\_prj\_obj'. The 'API Attribute ID' is 'custTestSubPrjObjs' and is highlighted with a red box. The 'Content Source' is 'Description'.

At the bottom right, there is a grid of icons representing different modules. The 'TEST SUB OBJECT' icon, which is a stack of coins, is highlighted with a red box.



# Rules Engine

- In the Modern UX there is now the option to create logic for hiding certain modules or sections based off attribute values.
- Easy way to create a flexible and dynamic user experience using views.

Example: Demand Management process

- Navigate to Modern UX → Administration
- Select on the Blueprints tile
- Search for the blueprint you want to create logic on
- Select Edit
- Navigate to the Rules tab
- Select New Rule

The screenshot displays the 'regoconsulting' interface in 'EDIT MODE' for a 'Blueprint Copy Test'. The 'Rules' tab is active, showing a table with columns: \*Rule Name, \*Ena..., Description, Last Updated By, and Last Update... A 'New Rule' button is visible. Below the table, the 'New Rule' dialog box is open, showing the following fields and options:

- Rule Name \***: Approved
- Description**: Hide Tab on Approval
- Conditions**: A dropdown menu shows 'Status = Approved' with a search bar and a 'Clear All' button. The 'Match All' radio button is selected.
- Actions**: A dropdown menu shows 'Hide Sections' and 'Add Section...'. The 'Add Section...' dropdown is open, showing a list of status options: Unapproved, Submitted for Approval, **Approved** (checked), Converted, Cancelled, Rejected, and Incomplete.
- Buttons**: 'Cancel' and 'Create' buttons are at the bottom right.

# Field Level Security

- In the Modern UX there is now the option to secure attributes.
- All master objects can have their attributes secure.
- Easy way to avoid users from seeing certain attributes in their configurable list view.



- Navigate to Modern UX → Administration
- Select on the Attributes tile
- Search for attribute name
- Access Edits and Access View is required.

regoc consulting

Attributes

← ↓

Group By

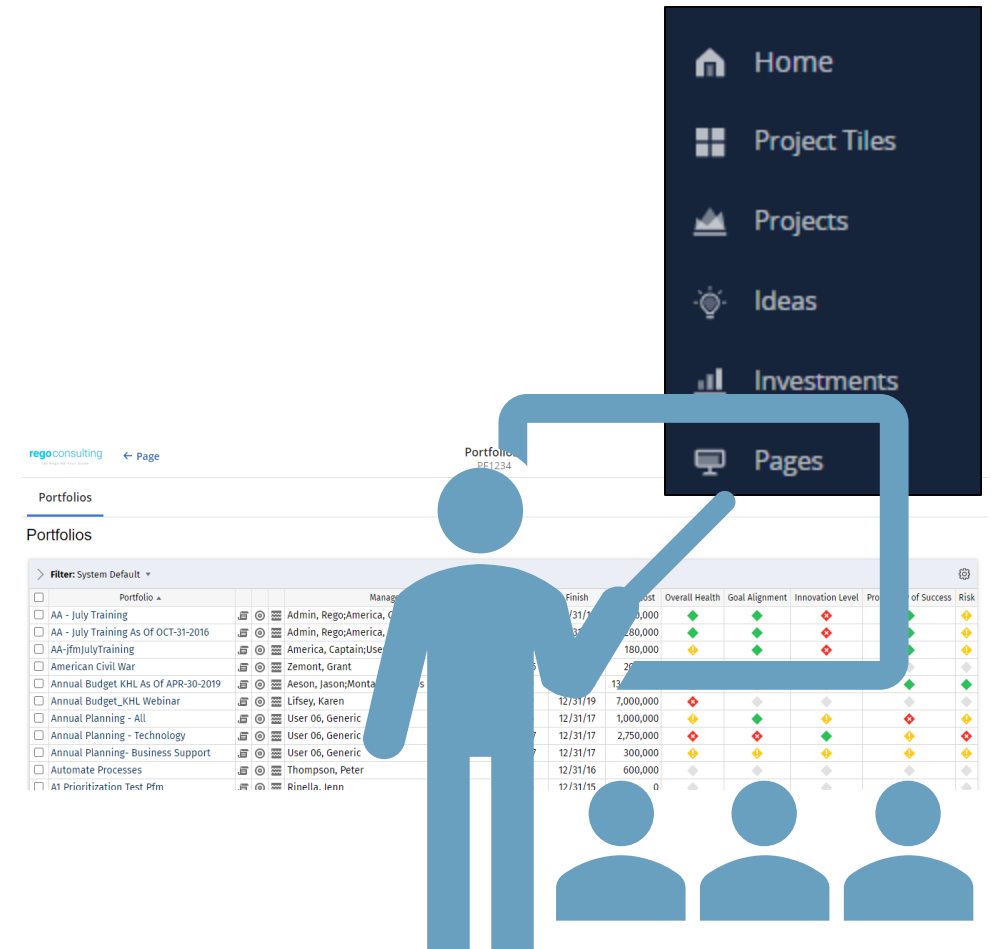
Attribute ↑	Attribute ID	Object	Secure	Access Edit	Access View	Database Table	Database Column	Active
% Complete	percent_complete	Project	✓	Search...		inv_projects	percent_complete	✓
% Complete Calculation Method	percent_calc_mode	Project				inv_projects	percent_calc_mode	✓
% Done By Agile Plan Estimate	agl_pctdon_plest	Project				odf_ca_project	agl_pctdon_plest	✓
% Done by Story Count	agl_pctdon_stc	Project				odf_ca_project	agl_pctdon_stc	✓
aatest Goal	rego_goal_code	Project				odf_ca_inv	rego_goal_code	✓
aatest Goal	rego_goal_code	Idea				odf_ca_inv	rego_goal_code	✓
aatest Goal	rego_goal_code	Release				odf_ca_inv	rego_goal_code	✓
aatest Goal	rego_goal_code	Enhance...				odf_ca_inv	rego_goal_code	✓
aatest Goal	rego_goal_code	Initiative				odf_ca_inv	rego_goal_code	✓

Clear All

- ☒ A Test Group
- ☒ Administration - XOG
- ☒ Advance ... Jaspersoft
- ☒ Amazon ... Member
- ☐ AHCO All ... w/AutoApprove
- ☐ AHCO VIEW IT - ALL

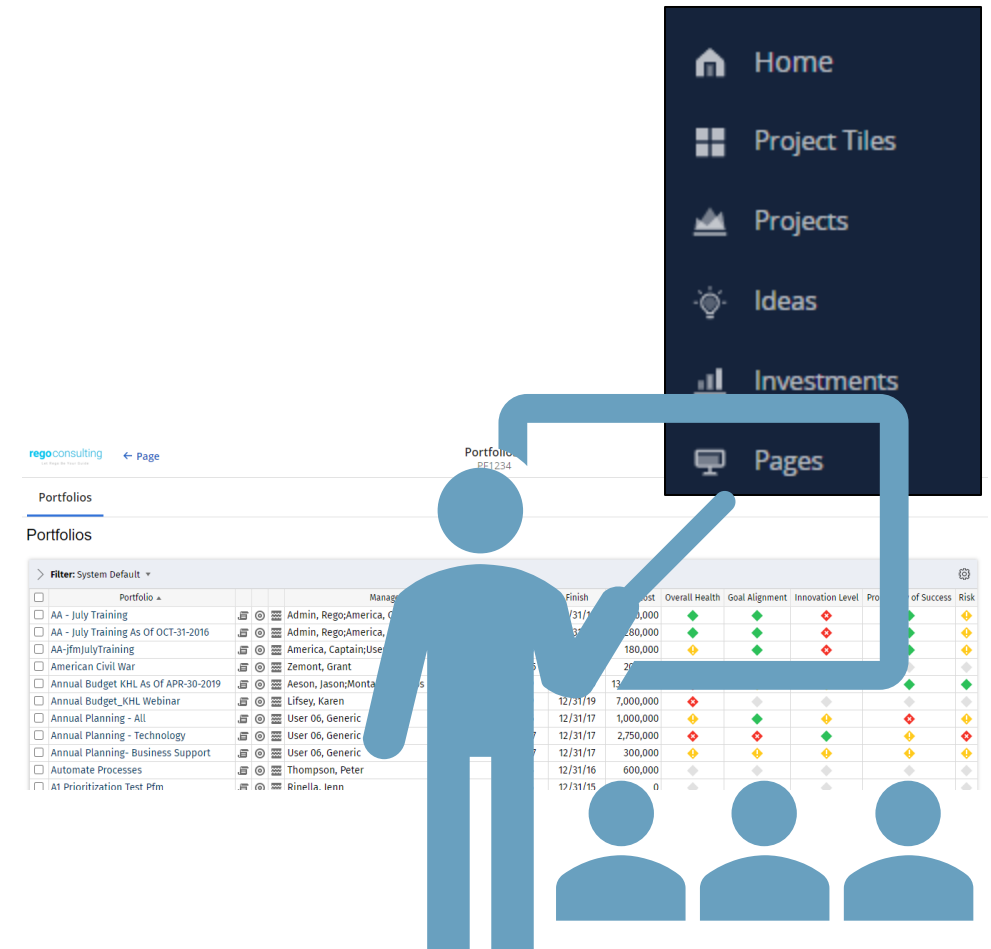
# Pages and Dashboards

- In the Modern UX there is a new option to display portlet dashboards called Pages.
  - Navigate to Modern UX → Pages
  - Select on the + icon to create a new row
  - Populate a Name and Id with relevant information.
    - Example: Portfolio List
  - Navigate to Administration → Blueprints
  - Filter Type → Page



# Pages and Dashboards

- Copy Standard Page
- Edit Copied version to relevant name
- Navigate back to Pages
- Select new blueprint and add Channel
- Input new Name and Address for Channel.
  - Example:  
[claritytest.com/niku/nu#action:pfm.portfolioList&puiFullscreen=on](http://claritytest.com/niku/nu#action:pfm.portfolioList&puiFullscreen=on)





# User Personalization Views

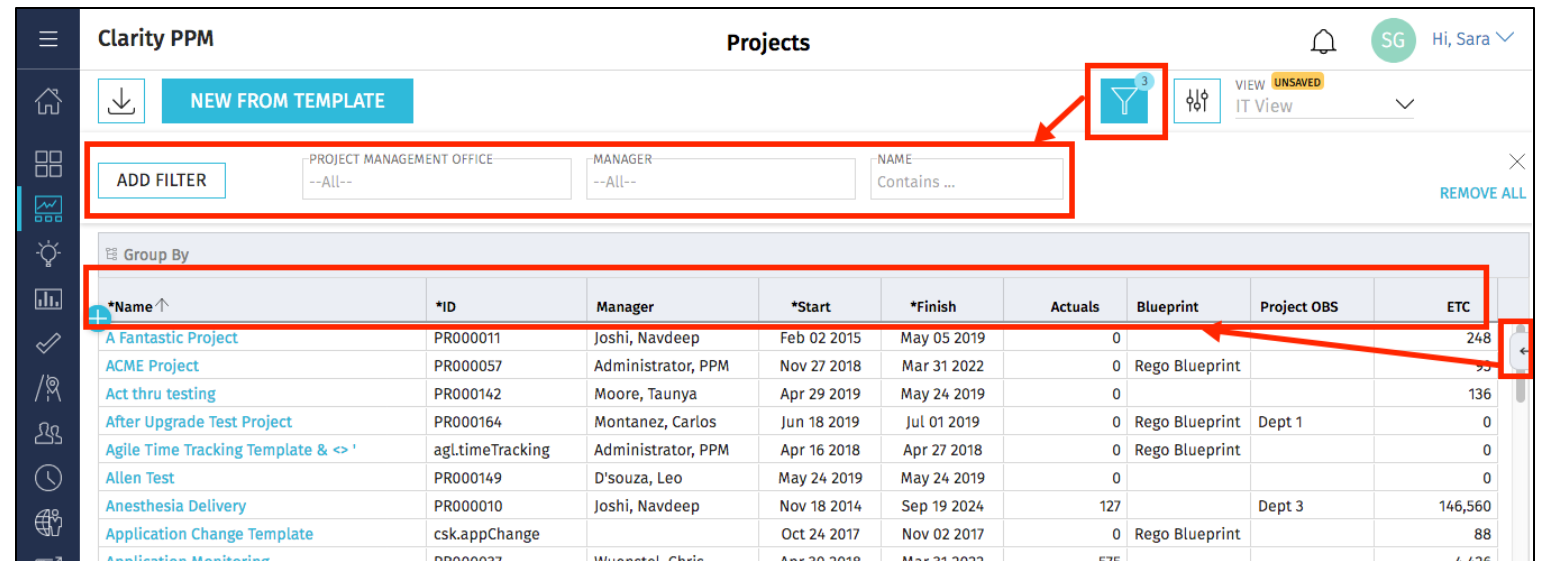


# Saving Views and Filters (1)

- In the Classic UX, Administrators may save configurations to list views and filters, to ensure users see the right fields in view.
- That same functionality is not available in the Modern UX, but administrators can save a view, and have the end users choose that view, to allow them to see a predefined set of fields and filters.

- To save a view:

- Configure the filter and columns as you want the users to see them using the column panel and the filter selection.

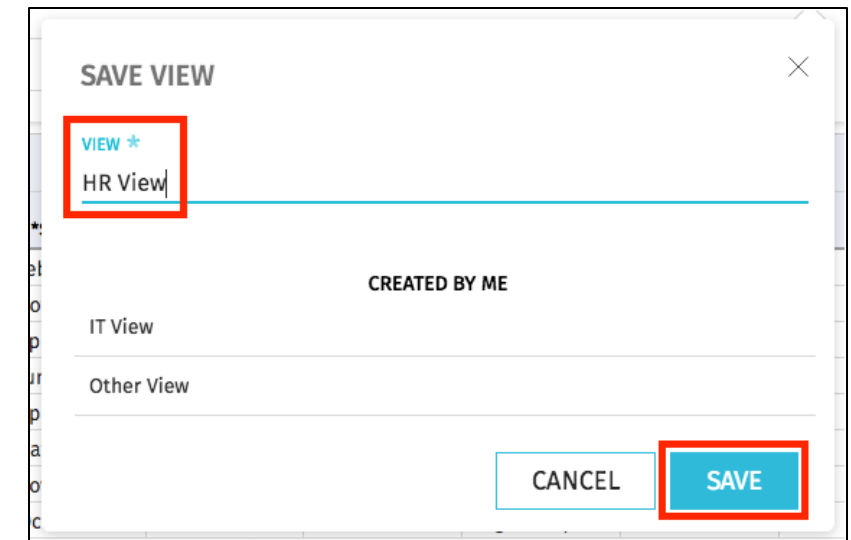
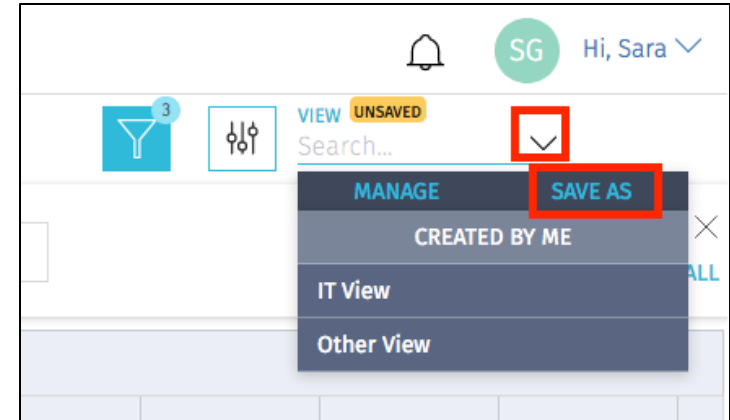


The screenshot shows the Clarity PPM interface for the 'Projects' section. A red box highlights the filter configuration area at the top, which includes an 'ADD FILTER' button and three filter criteria: 'PROJECT MANAGEMENT OFFICE' (set to '--All--'), 'MANAGER' (set to '--All--'), and 'NAME' (set to 'Contains ...'). Another red box highlights the column configuration area below the table, showing a list of columns: '\*Name ↑', '\*ID', 'Manager', '\*Start', '\*Finish', 'Actuals', 'Blueprint', 'Project OBS', and 'ETC'. A third red box highlights the table data, which includes project names like 'A Fantastic Project', 'ACME Project', and 'After Upgrade Test Project', along with their IDs, managers, start/finish dates, and actuals. The table is sorted by 'Name' in ascending order.

*Name ↑	*ID	Manager	*Start	*Finish	Actuals	Blueprint	Project OBS	ETC
A Fantastic Project	PR000011	Joshi, Navdeep	Feb 02 2015	May 05 2019	0			248
ACME Project	PR000057	Administrator, PPM	Nov 27 2018	Mar 31 2022	0	Rego Blueprint		93
Act thru testing	PR000142	Moore, Taunya	Apr 29 2019	May 24 2019	0			136
After Upgrade Test Project	PR000164	Montanez, Carlos	Jun 18 2019	Jul 01 2019	0	Rego Blueprint	Dept 1	0
Agile Time Tracking Template & <>'	aglTimeTracking	Administrator, PPM	Apr 16 2018	Apr 27 2018	0	Rego Blueprint		0
Allen Test	PR000149	D'souza, Leo	May 24 2019	May 24 2019	0			0
Anesthesia Delivery	PR000010	Joshi, Navdeep	Nov 18 2014	Sep 19 2024	127		Dept 3	146,560
Application Change Template	csk.appChange		Oct 24 2017	Nov 02 2017	0	Rego Blueprint		88
Application Monitoring	PR000037	Wuestel, Chris	Apr 30 2018	Mar 31 2022	575			6,426

# Saving Views and Filters (2)

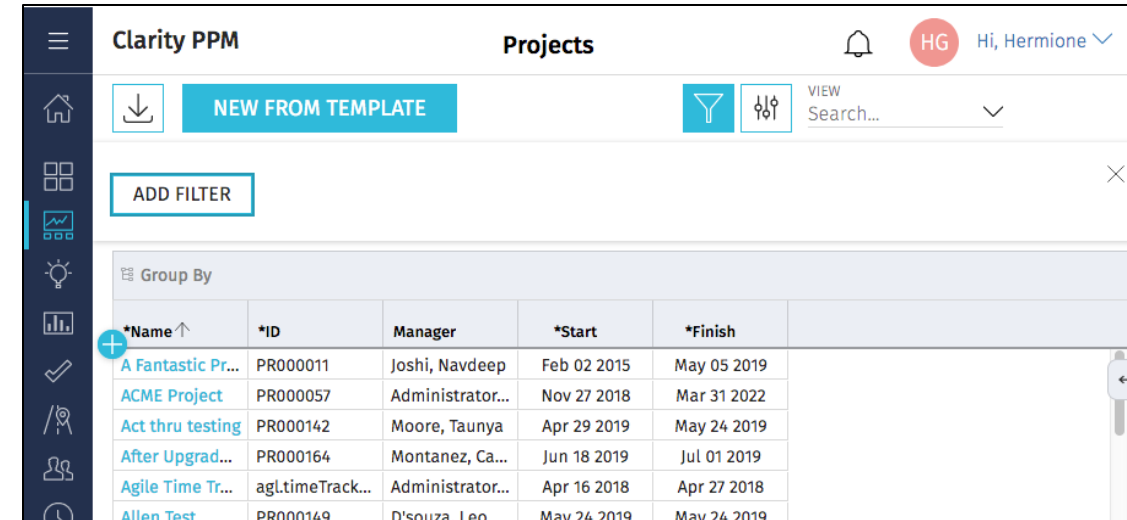
- To save a view (continued):
  - Once the filter and fields are added, use the *View* menu in the upper right corner to select **Save As** to Save the View.



Enter a name for the View, and click **Save**

# Saving Views and Filters (3)

- Once the View is Saved, End Users may then search for and apply the view applicable to them.



Clarity PPM Projects

NEW FROM TEMPLATE

ADD FILTER

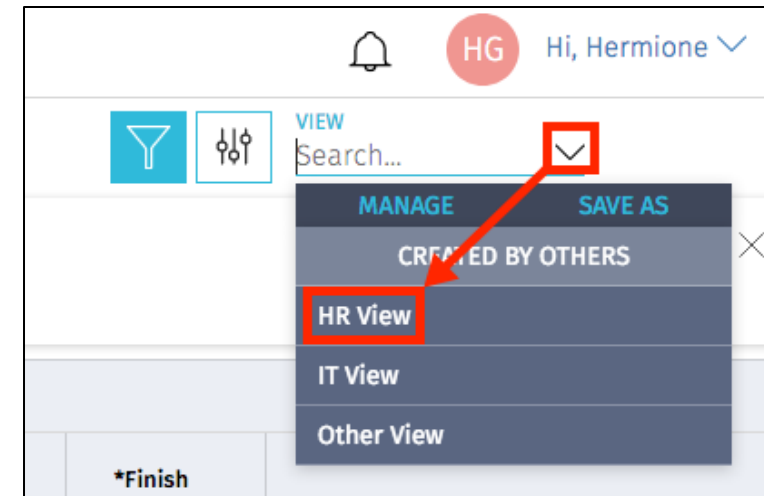
VIEW Search...

Group By

*Name ↑	*ID	Manager	*Start	*Finish
A Fantastic Pr...	PR000011	Joshi, Navdeep	Feb 02 2015	May 05 2019
ACME Project	PR000057	Administrator...	Nov 27 2018	Mar 31 2022
Act thru testing	PR000142	Moore, Taunya	Apr 29 2019	May 24 2019
After Upgrad...	PR000164	Montanez, Ca...	Jun 18 2019	Jul 01 2019
Agile Time Tr...	aglTimeTrack...	Administrator...	Apr 16 2018	Apr 27 2018
Allen Test	PR000149	D'souza, Leo	May 24 2019	May 24 2019

Original View, without desired fields and filters

- Instruct users to search for and apply the view using the View menu.



# Saving Views and Filters (4)

- The new view will now be applied.

Clarity PPM Projects

NEW FROM TEMPLATE

VIEW HR View

ADD FILTER

PROJECT MANAGEMENT OFFICE --All--

MANAGER --All--

NAME Contains ...

REMOVE ALL

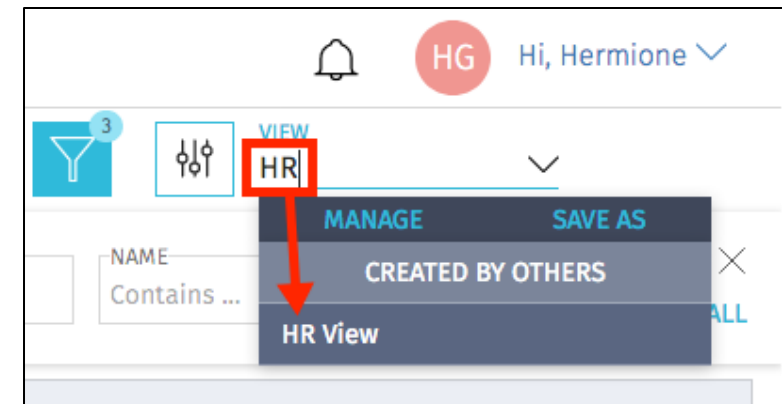
Group By

*Name ↑	*ID	Manager	*Start	*Finish	Actuals	Blueprint
A Fantastic Project	PR000011	Joshi, Navdeep	Feb 02 2015	May 05 2019	0	
ACME Project	PR000057	Administrator, PPM	Nov 27 2018	Mar 31 2022	0	Rego Blueprint
Act thru testing	PR000142	Moore, Taunya	Apr 29 2019	May 24 2019	0	
After Upgrade Test Project	PR000164	Montanez, Carlos	Jun 18 2019	Jul 01 2019	0	Rego Blueprint
Agile Time Tracking Template & <> '	agl.timeTracking	Administrator, PPM	Apr 16 2018	Apr 27 2018	0	Rego Blueprint

**Saved View, with desired fields and filters**

# Notes on Saved Views

- There is no security right associated with saving views.
  - In 15.9.3 “Share” will be an option for users. Defaulted to false. This option will restrict users from seeing all views saved.
- This means that any end user can save a view that others will see. If everyone starts doing this, the list of views can become quite long.
- To limit scrolling through a long list of views, end users may use the Search functionality to search for and more easily locate the view you’re asking them to apply.





# User Personalization Picklists

# What Are Picklists?



Picklists are similar to Static Lookups, but can be added by users on the Modern UX without depending on Admins/Clarity Studio



They are only visible in Modern UX and under certain cases like Roadmaps or Tasks, the values are specific to that Investment or Roadmap allowing for additional levels of personalization

# Creating a Picklist

- Navigate to an Object's List View that supports Picklists
- Click on the gear icon and select "Manage Picklists"

The screenshot shows the Clarity 'Projects' list view. The main table displays project data with columns for Project Type, Project ID, and Project Name. A gear icon (View Options) is visible above the table. The 'View Options' panel on the right is open, showing settings for the 'Grid' view, including Periods, Start/End Period, Totals, and Decimal Display. The 'Manage Picklists' link is located at the bottom of the panel.

Project Type	Project ID *	Project Name * ↑
<input type="checkbox"/>	PR1332	Regolink SharePoint Sites Imple
<input type="checkbox"/>	PR1315	SharePoint sites enablement

**View Options**

**Grid**

Periods: Months

Start Period: Start of Current Year

End Period: End of Current Year

Totals: ☒ Sum of Periods ☐ Grand Totals

Per-Period Metrics: [Dropdown]

Money Decimal Display: ☒ 0 ☐ 0.0 ☐ 0.00 ☐ Auto

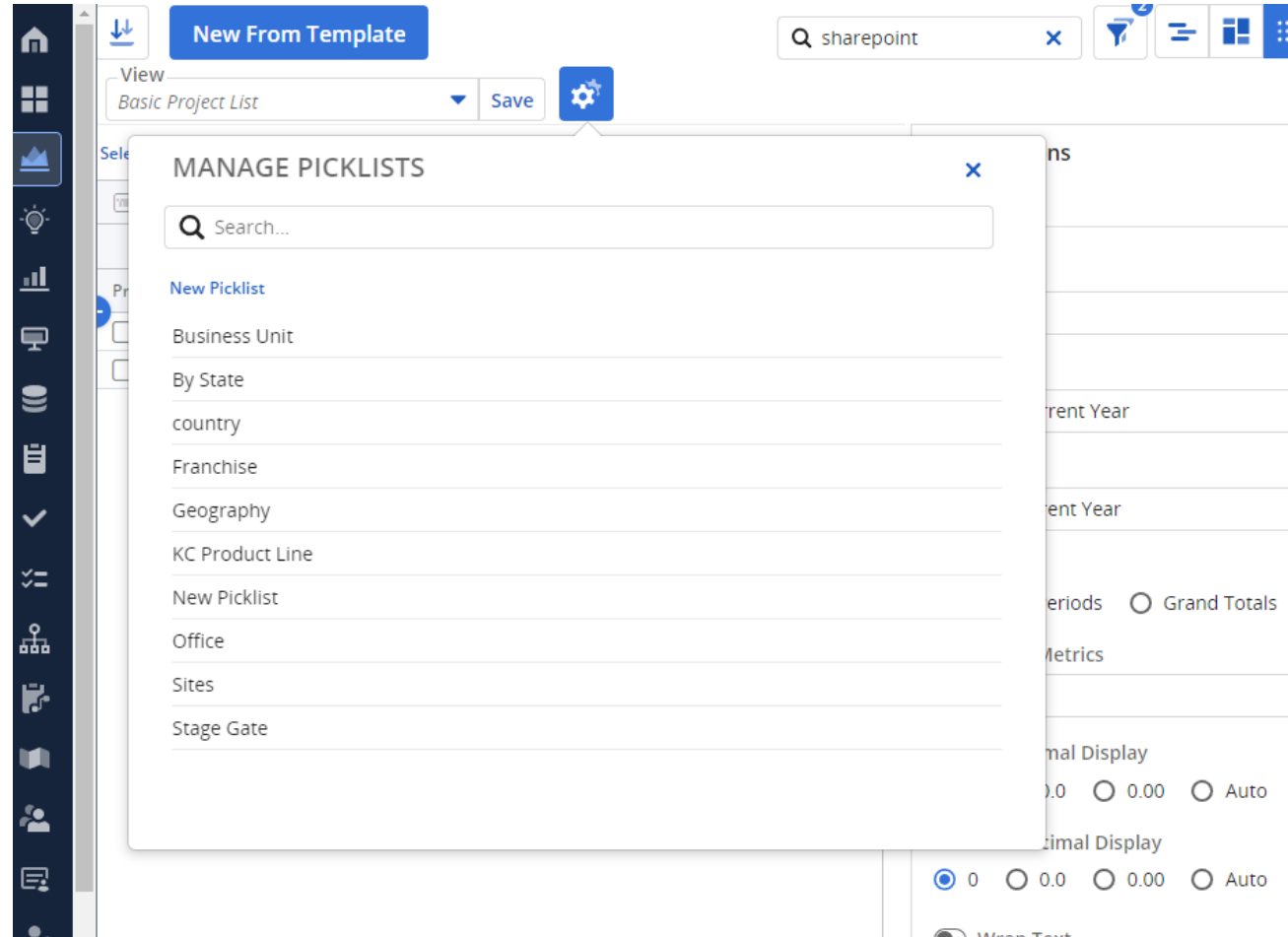
Number Decimal Display: ☒ 0 ☐ 0.0 ☐ 0.00 ☐ Auto

☐ Wrap Text

[Manage Picklists](#)

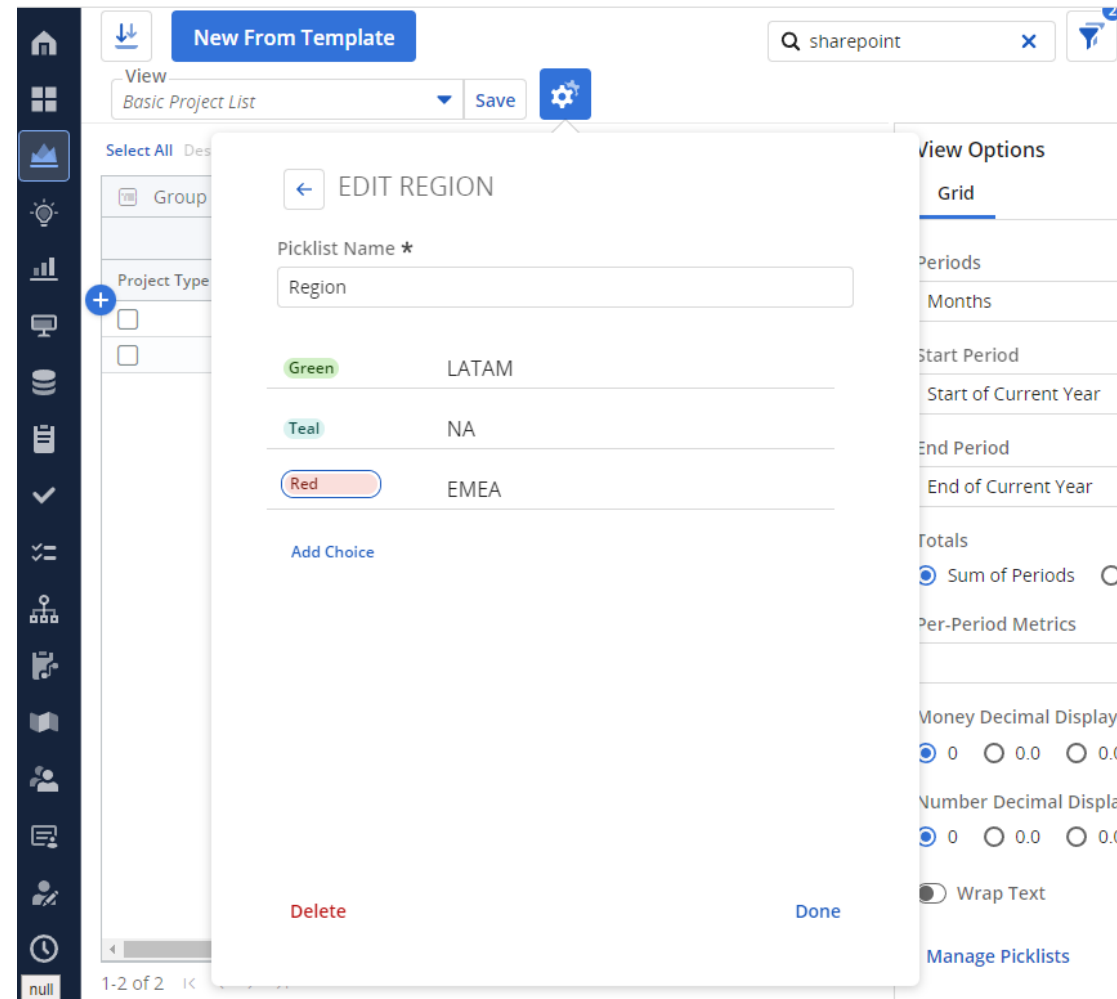
# Creating a Picklist

- Once the “Manage Picklists” popup comes up, select “New Picklist”



# Creating a Picklist

- Provide a “Picklist Name”
- Provide values by selecting “Add Choice”
- Additionally, you can choose a color similar to Classic UI buckets
- After you are finished click on “Done”





# Creating a Picklist

- The Picklist and values are now available

The screenshot displays the Clarity Projects application interface. The top navigation bar includes the Clarity logo, a 'Projects' title, and a user profile icon labeled 'CA'. Below the navigation bar, there is a 'New From Template' button and a search bar containing the text 'share'. A 'View' dropdown menu is set to 'Basic Project List', with a 'Save' button and a settings gear icon next to it. The main content area features a table with columns: Project Type, Project ID \*, Project Name \*, Manager, and Region. Two rows are visible: one for PR1332 (Regolink SharePoint Sites Implementa...) managed by Administrator, Clarity in the LATAM region, and another for PR1315 (SharePoint sites enablement) managed by Henao, Julian in the NA region. A picklist menu is open for the 'Region' column, showing options: -- None --, NA (selected), LATAM, and EMEA. The left sidebar contains various navigation icons, including a plus sign icon.

Project Type	Project ID *	Project Name *	Manager	Region
<input type="checkbox"/>	PR1332	Regolink SharePoint Sites Implementa...	Administrator, Clarity	LATAM
<input type="checkbox"/>	PR1315	SharePoint sites enablement	Henao, Julian	NA





# Master Clarity with Rego University

Earn Certifications in  
Administration, Leadership,  
and Technical Proficiency

Let Rego be your guide.





# Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to continue our **certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



## Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **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

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





# Thank You for Attending Rego University

## Instructions for PMI credits

- Access your account at [pmi.org](https://pmi.org)
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **Rego University**
- 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.



### Phone

888.813.0444



### Email

[info@regoconsulting.com](mailto:info@regoconsulting.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)

# Continue to Get Resources and Stay Connected

- 1 Use [RegoXchange.com](https://RegoXchange.com) for instructions and how-tos.
- 2 Talk with your account managers and your Rego consultants.
- 3 Connect with each other and Clarity experts at [RegoGroups.com](https://RegoGroups.com).
- 4 Sign up for webinars and join in-person Rego groups near you through at [RegoConsulting.com](https://RegoConsulting.com)
- 5 Join us for the next [Rego University](#)!

