



Building Custom Solutions and Apps with Studio

Your Guides:
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Agenda

- Introduction
- Basic Configuration, Modern UX Configuration and Navigation
- Attribute and Object Administration

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 BlueprintsExample: “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 contains a single entry labeled 'Runtime Next Number'.

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.

Create Object Definition

Object Name

Object ID

Content Source

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.)

Save Save And Return 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

☐	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:** 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.

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

Partition System

Next Number 00000001

Status Active

Segments

☐	Type of Segment	Text Value	Counter Starting Number	Counter Length	Auto-extended
☐	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

Value

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
☐ Numeric Counter		00000001	8	✓
☐ 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

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 breadcrumb trail is 'Home > Administration > Favorites'. The page title is 'Object: Project | Attribute: Project Kickoff Meeting Complete - Object Attribute'. The 'General' tab is selected. The form contains the following fields and options:

- Attribute Name:** Project Kickoff Meeting Complete
- Attribute ID:** huss_pk
- Description:** (empty text box)
- Data Type:** Lookup - Number
- Lookup:** Yes or No
- Default:** (empty text box with a dropdown arrow)
- 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:** PKMeeting (This is the attribute id used in the REST API. Set this to make the attribute available via the REST API.)
- Include in the Data Warehouse:** ☐
- Include in the Data Warehouse Trending:** ☐

The 'API Attribute ID' field is highlighted with a red rectangle.

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

Basic Components Modern UX

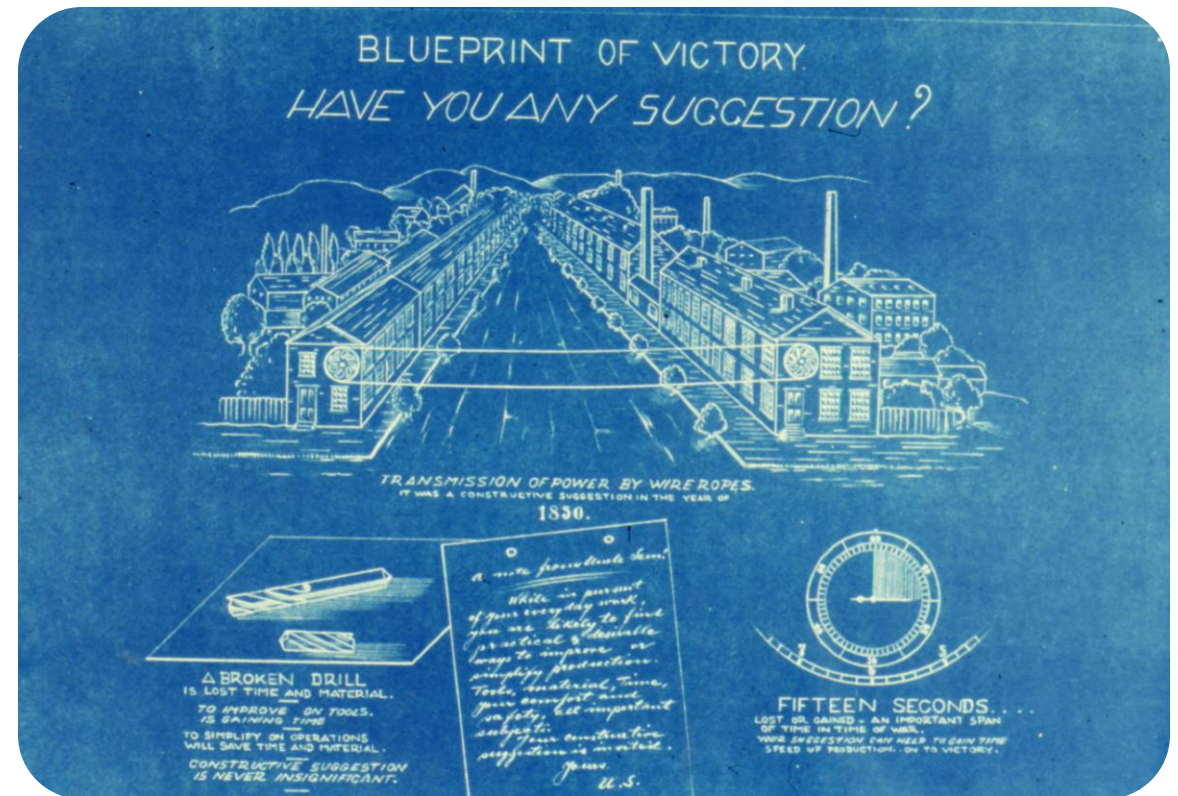
- Blueprints
 - Modules
 - Views
 - Channels
 - Actions
 - Business Rules
- Field Level Security
- Pages (Dashboards)
- User Personalization
 - Views
 - Picklists

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



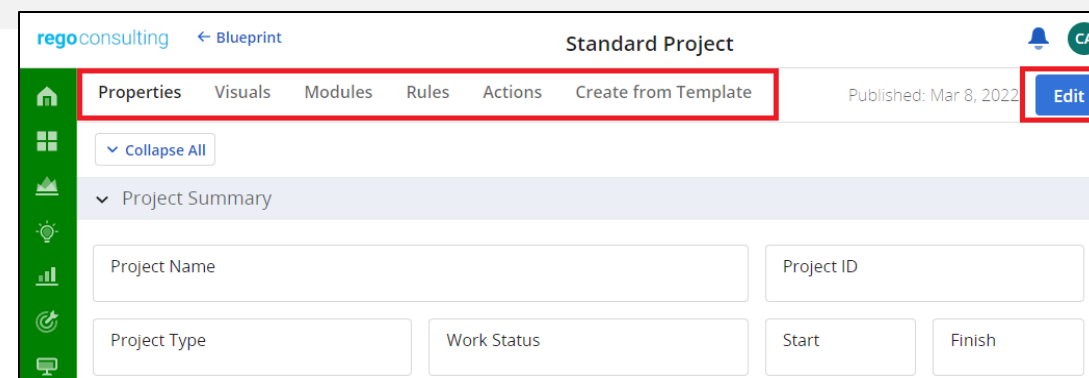
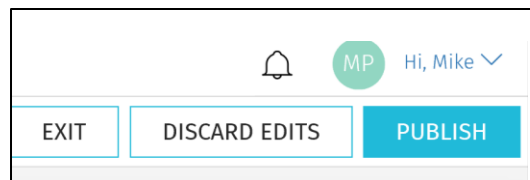
Overview

- 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

Blueprint Configuration

Blueprint Properties

- Using a Project Blueprint as an example, the Properties view will allow you to configure the following. **(We will go more in-depth on these topics later)**
 - Properties** – Defines the properties pane of the object. Admins can configure “Sections” and “Attributes” by dragging, dropping and resizing accordingly.
 - Visuals** – Define the icons on the Project Tiles view. (Only available for Project Blueprints.)
 - Modules** – Supporting “tabs” that can be added or removed from the Blueprint. The modules include functionality like Financials, Teams, Risk, Issues, Changes, Custom Sub-Objects and/or Channels.
 - Rules** – Create business rules to control how end users are engaged, when a rule is met it will perform actions like showing or hiding fields/sections.
 - Actions** – Create actions to allow end users to execute a process, admins can control when this actions are available.
 - Create from Template** – Similar to the properties page, allows admins to add or remove fields for the create from template properties view.
- By default, the Blueprint is in “View Only” mode
- Clicking on “Edit” mode will allow admins to perform changes and publish afterwards

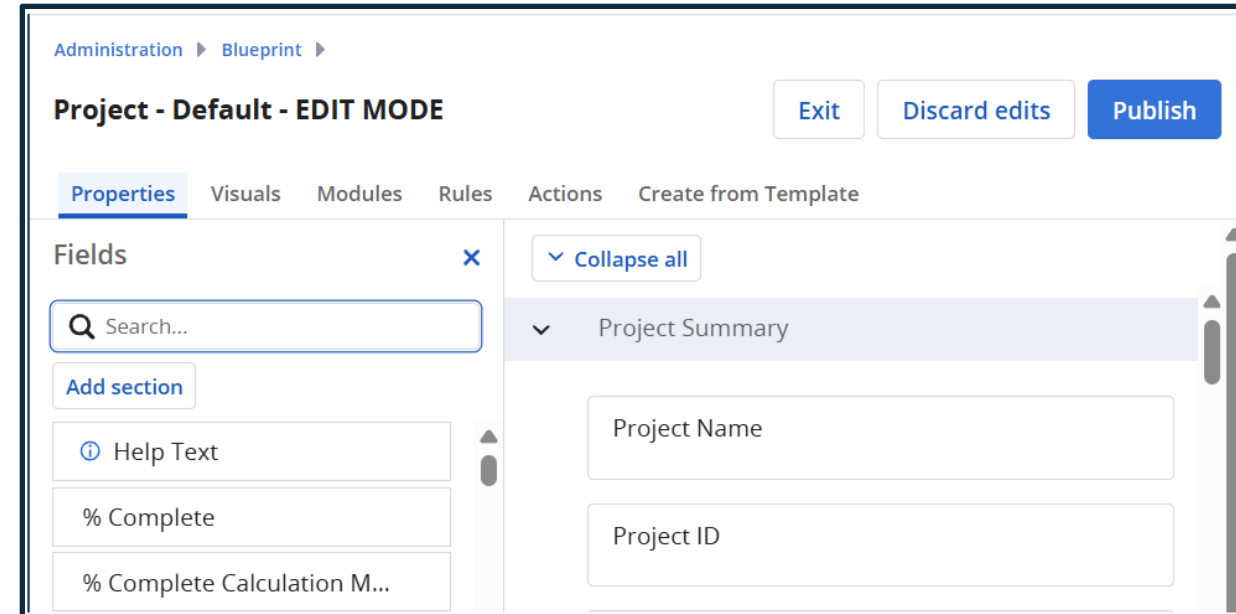


Properties



Fields Pane

- Provides list of fields that can be added:
 - By default, it contains a list of out-of-the-box Project and Investment fields
 - Custom fields can be added (as long as the field has an API Alias)
 - Also includes Help Text that can be used multiple times in the Properties tab to provide different Help Text
- Fields that already exist on your Blueprint are greyed out



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

- Custom Time-Scaled Value (TSV)

Properties



Layout

- Click the **Add Section** button to add a new section to the Details
- Add or move a field by simply dragging and dropping the field into a section
- Remove a field by clicking the **X** in the top right-hand corner of the field
- Resize the field by dragging the bottom right-hand corner of the field

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

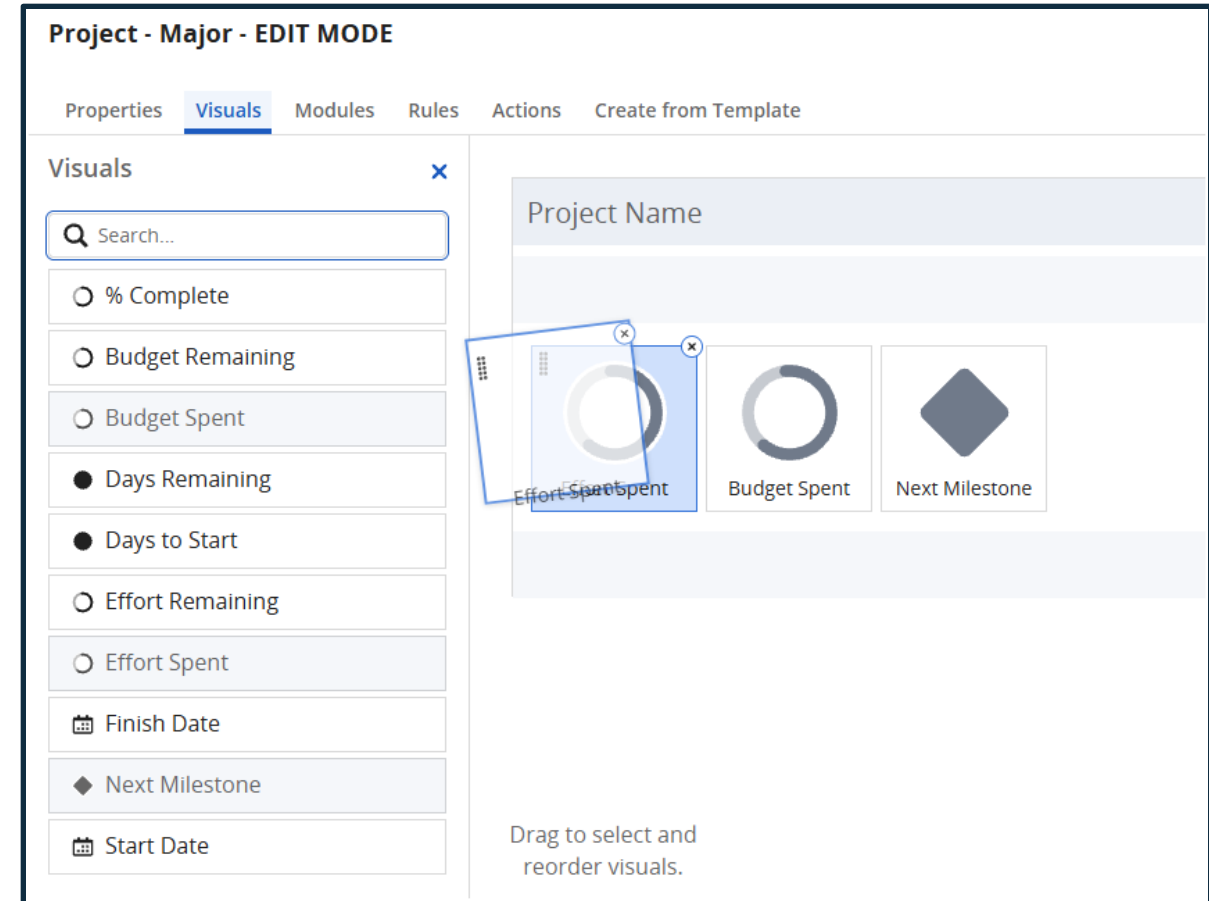
- Rich Text Formatted help content
- Links
- Tables
- Pictures
- And more!

The image shows two overlapping windows. The top window is titled 'Edit Help Text' and features a rich text editor with various formatting options like bold, italic, underline, and text color. The bottom window is titled 'Lifecycle' and displays a horizontal flowchart with five stages: 'Project Conception and Initiation', 'Project Definition and Planning', 'Project Launch or Execution', 'Project Performance and Control', and 'Project Close'. Below the flowchart are five date fields labeled 'G1 Date', 'G2 Date', 'G3 Date', 'G4 Date', and 'G5 Date'. The 'Edit Help Text' window is positioned over the 'Project Performance and Control' stage of the flowchart.

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

Visuals (Projects Only)

- ⚙️ **Visuals** are displayed on the Project Tiles view
- ⚙️ Currently, there are 10 out-of-the-box Visuals to choose from
- ⚙️ Add or move Visuals by simply dragging and dropping
- ⚙️ Remove a Visual by clicking the **X** in the top right-hand corner of the icon
- ⚙️ Links for the first 4 configured modules will be displayed below the visuals



Modules



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

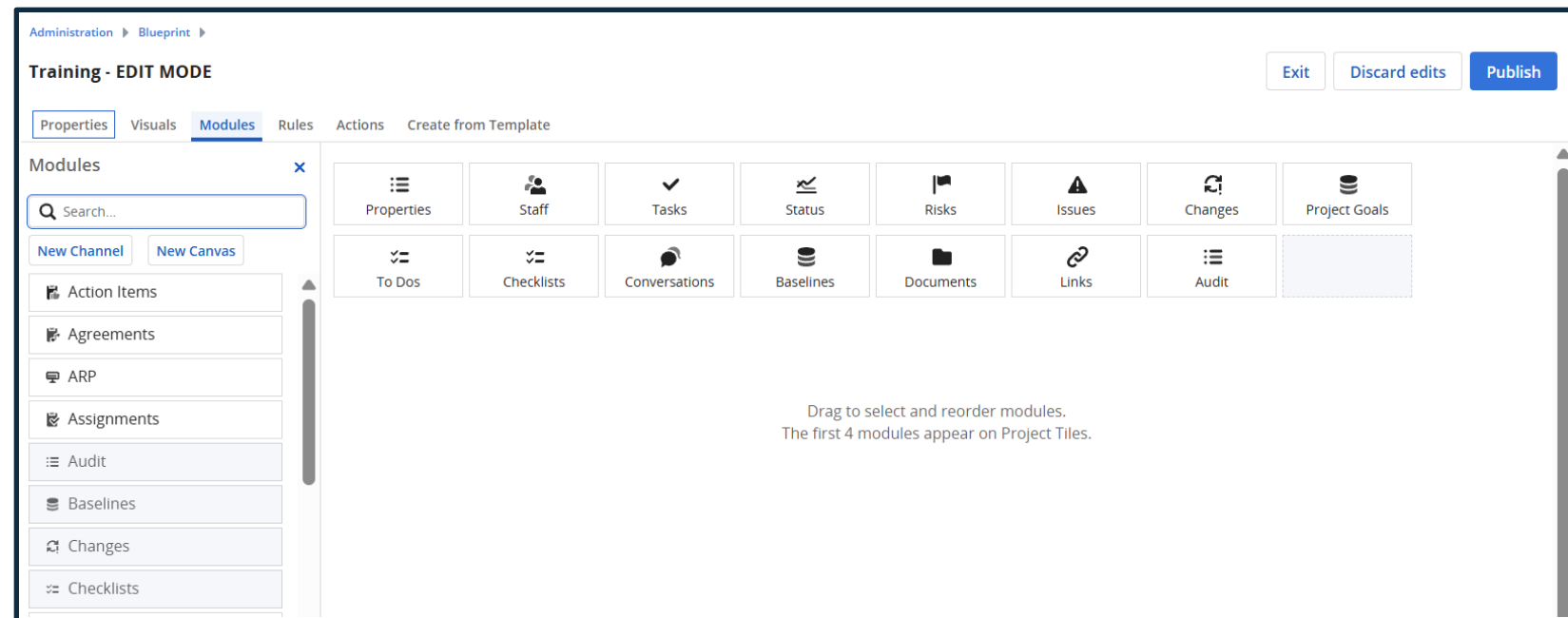


There are several core Modules which are not configurable and provide functionality like project financials, To-Dos, etc.



In addition to the core Modules, there are configurable:

- Channels
- Ability to add custom sub-objects (only if the sub-object is API Enabled)



Modules – Channels



Channels are configurable Modules which embed: Classic UI URLs (recommend Phoenix Theme and relative URLs), Modern UI URLs and External Applications



Users can stay directly in Clarity and get the additional pertinent information



Configuration

- Channel Name
- Channel URL
- Referrer and SSO Configuration
- Use attributes as parameters for the URL



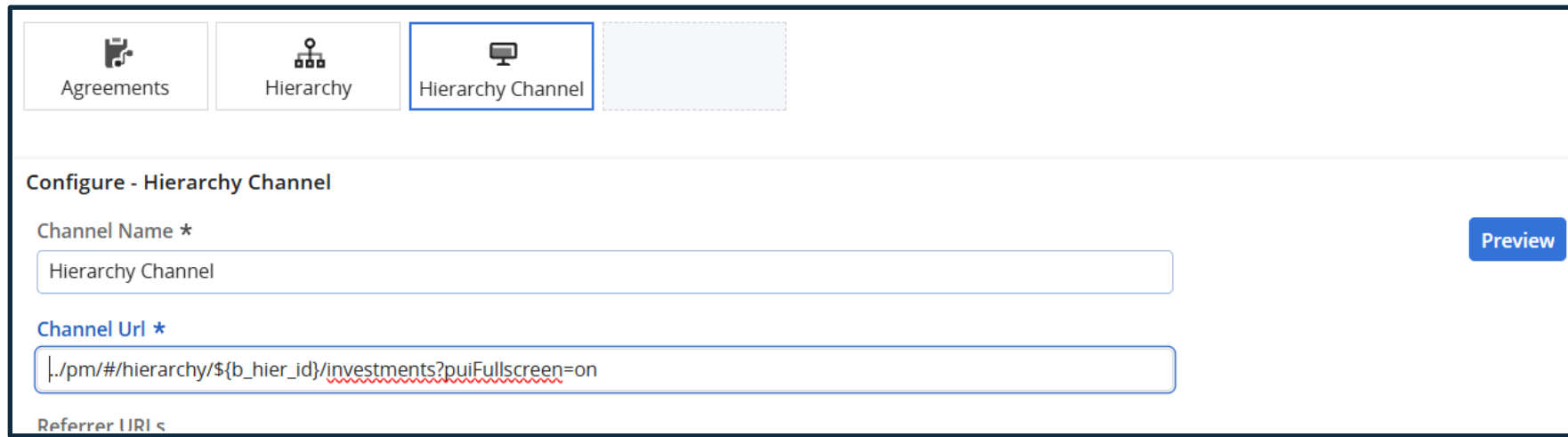
Tabs and Menu can be suppressed in channels and parameters can be passed to a channel

The screenshot displays the Clarity project management interface. The top navigation bar shows the project name 'ABLE Payments' with a status 'At Risk'. Below the navigation bar, the 'Workflow' tab is selected, showing a list of workflow items. The main content area displays the 'Project: eCommerce Portal - Processes - Initiated' workflow. The 'Workflow' configuration screen is visible, showing a list of modules (Properties, Tasks, Baselines, Financials, Staff, Assignments, Risks, Issues, Changes, Decisions, Checklists, To Dos, Status, Dashboard, Documents, Agreements, Audit) and a 'Configure - Workflow' section with fields for Channel Name, Channel URL, and Referrer URLs.

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 'Preview' button is located to the right of the 'Channel Name' field. At the bottom, there is a partially visible 'Referrer URL's' field.

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 interface for configuring 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



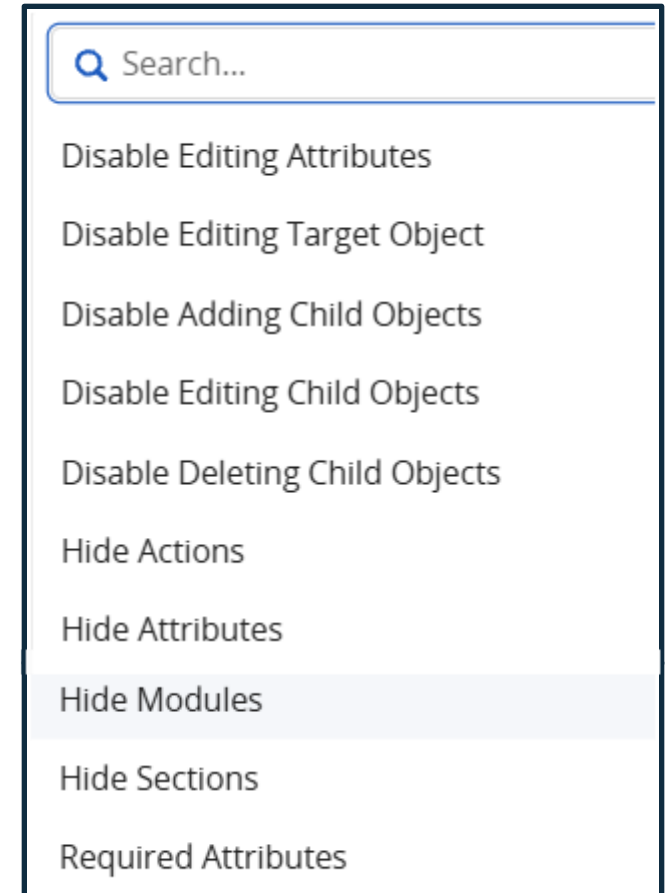
Conditional Required Modal

- 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

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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 *

When Sponsor changes, transfer instance rights

Description

Enter the rule description

Target Object

Project

Rule Type

Determine when the below actions are executed. Only one rule type may be selected per business rule.

☐ View Page - Runs every time a user views page, supports only one complex condition (UI action only)
 ☐ Attribute Update - Run only when a selected attribute is updated, supports multiple conditions blocks (Data and UI actions)
 ☒ 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

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

New Rule

Rule Name *
When Active field is changed

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 + 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

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

The screenshot displays the 'Actions' tab in a software interface. At the top, there are tabs for 'Properties', 'Modules', 'Rules', 'Actions' (which is selected), and 'Create from Template'. Below the tabs, there is a 'Select All' and 'Deselect All' link. A table lists the actions with columns for 'Order', 'ID', 'Name', 'Enabled', and 'Process Name'. Two actions are listed: 'Allocate From Estimates' and 'Contractor Reminders'. Both are enabled, indicated by blue checkmarks. A tooltip 'Add Process' is visible over the 'Add Process' button.

Order *	ID *	Name *	Enabled *	Process Name *
1	00000460	Allocate From Estimates	✓	
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

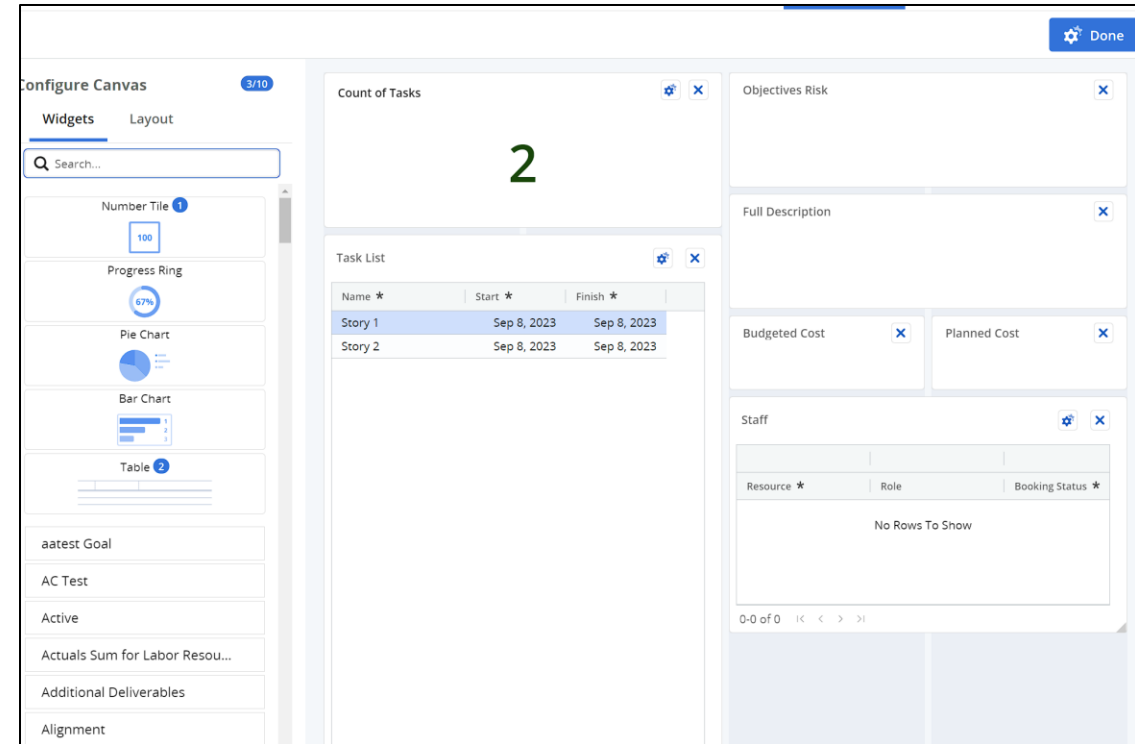
Banner Color

Charge Code

Cost Type

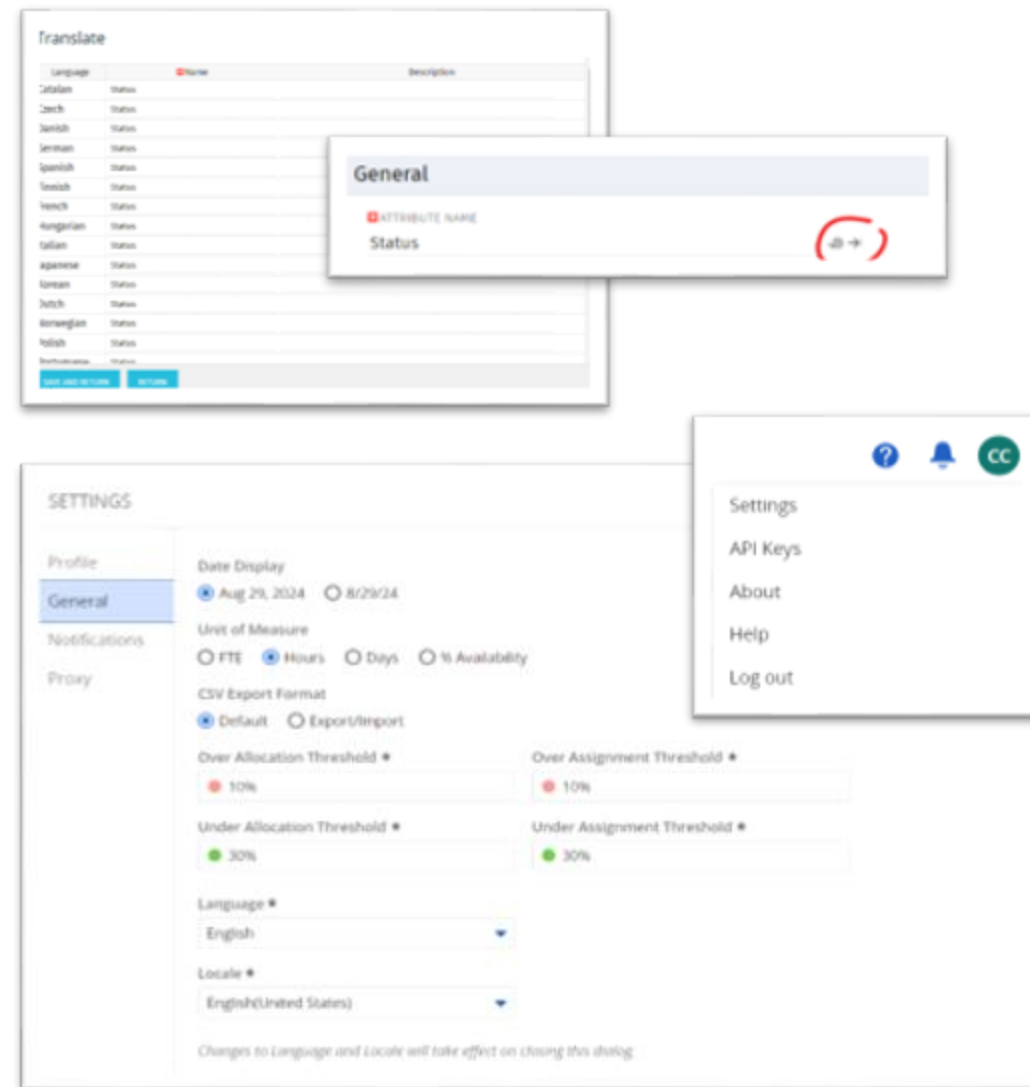
Canvas

- 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% ×
▼ Active ☑ = Yes ×
▼ Business Alignment > 15 ×
▼ Alignment ≠ 100 ×
+ Add filter
Remove all

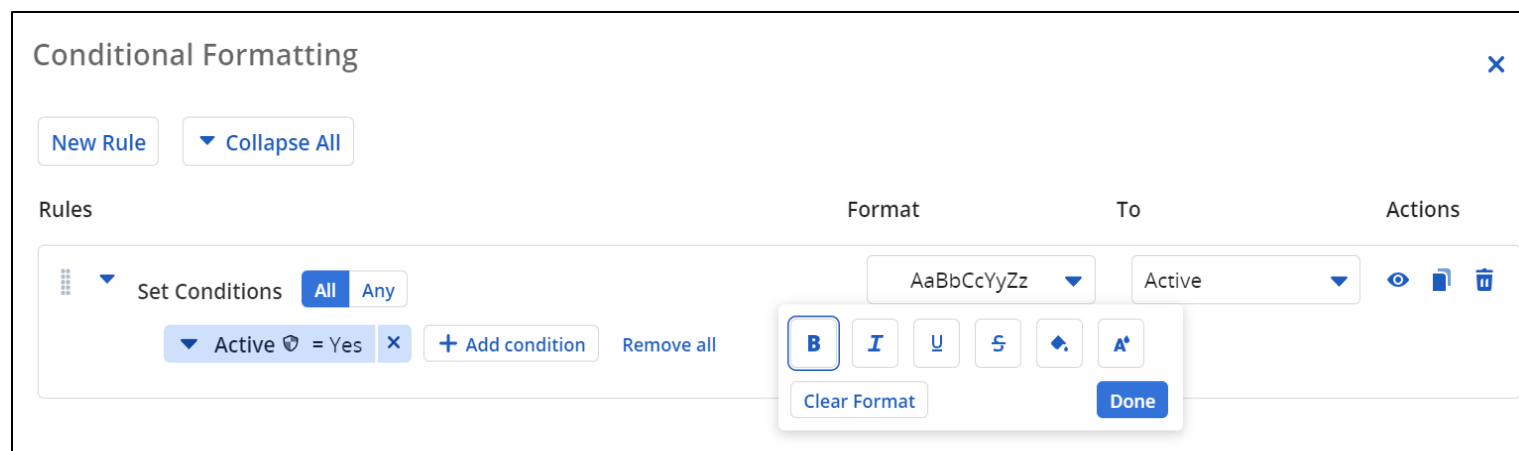
Actions

+ Add actions

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

Conditional Formatting

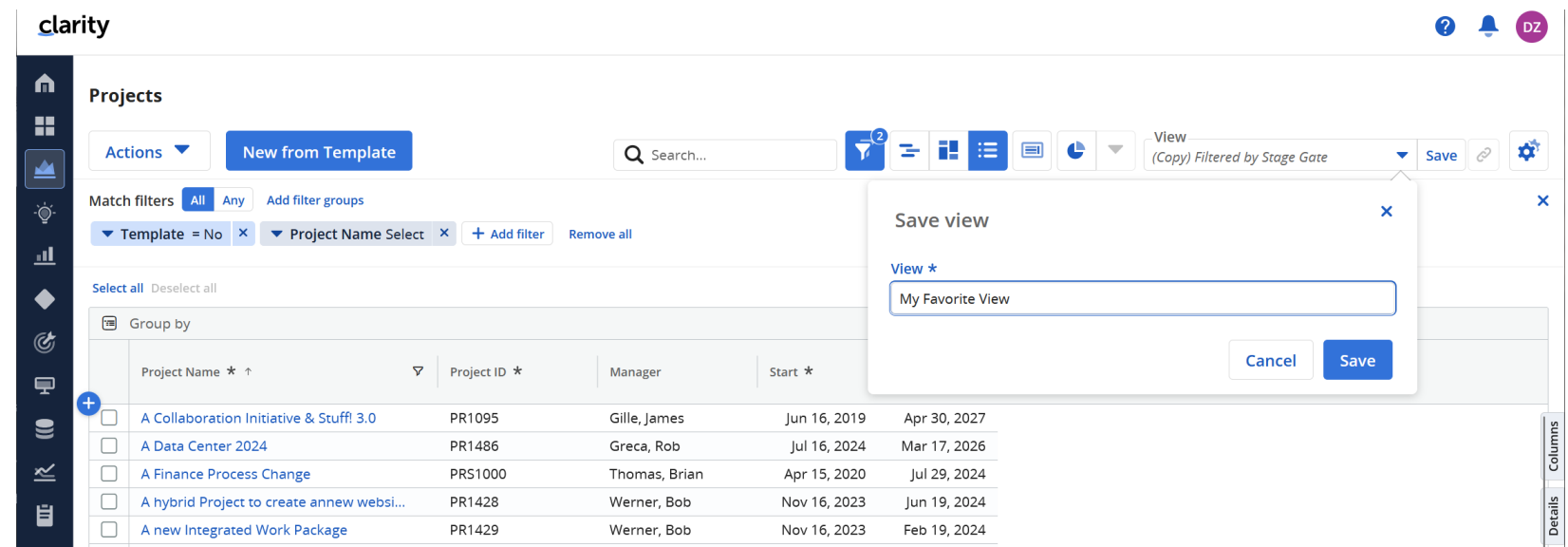
- Conditional Formatting is now available on the list areas in the modern experience as of 16.2
- Rules: Apply a positive test scenario
- Format: Applies the below to the To
 - Bold
 - Italics
 - Underline
 - Strikethrough
 - Background Color
 - Font Color
- To: What column should be affected by the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



User Personalization Views

Saving Views and Filters (1)

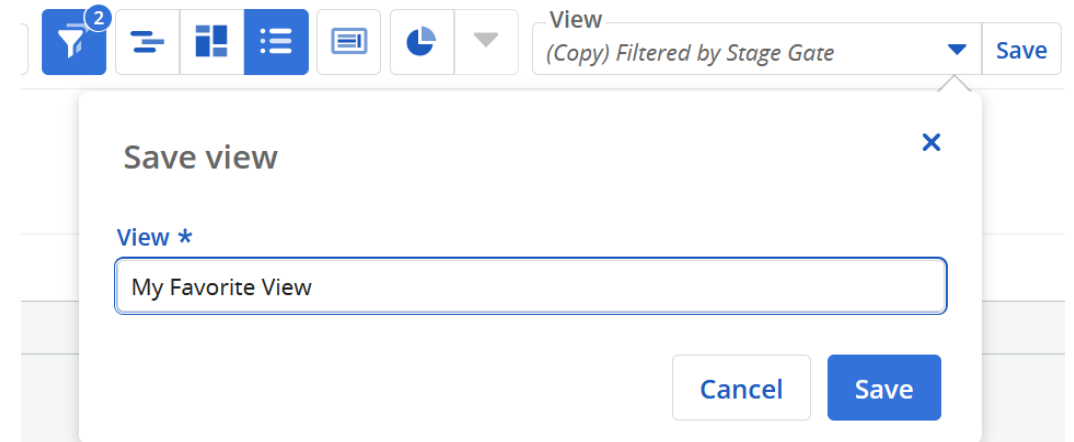
- In the Classic UX, Administrators may save configurations to list views and filters, to ensure users see the right fields in view.
- That same functionality is not available in the Modern UX, but administrators can save a view, and have the end users choose that view, to allow them to see a predefined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



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

Original View, without desired fields and filters

Projects

Actions ▾ New from Template

Search...

Match filters All Any Add filter groups

Template = No x Project Name Select x + Add filter Remove all

Select all Deselect all

Group by

	Project Name * ↑	Project ID *	Manager	Start *	Finish *
☐	A Collaboration Initiative & Stuff! 3.0	PR1095	Gille, James	Jun 16, 2019	Apr 30, 2027
☐	A Data Center 2024	PR1486	Greca, Rob	Jul 16, 2024	Mar 17, 2026
☐	A Finance Process Change	PR51000	Thomas, Brian	Apr 15, 2020	Jul 29, 2024
☐	A hybrid Project to create annew websi...	PR1428	Werner, Bob	Nov 16, 2023	Jun 19, 2024
☐	A new Integrated Work Package	PR1429	Werner, Bob	Nov 16, 2023	Feb 19, 2024
☐	A New Product Launch	PR1150	Roberts, Beth	May 10, 2019	Jun 25, 2026
☐	A Porffolin Initiative FY 24	PR1132	Marrin, Paul	Jun 3, 2019	Jun 25, 2026

View: My Favorite View Save

Search...

Manage Save as

Favorites

- My Favorite View

Recommended

- Budgeted Cost By Project View
- Filtered by Stage Gate

Others

- AIR Demo
- CWM Project List View

New View, with desired fields and filters

Projects

Actions ▾ New from Template

Search...

Match filters All Any Add filter groups

Template = No x Manager = Current User x + Add filter Remove all

Select all Deselect all

Group by

	Project Name * ↑	Project ID *	Manager	Start *	Finish *
☐	Agile Product Innovation for Clarity	PR1373	Zywiec, David	Jan 1, 2023	Dec 31, 2023
☐	Bancard JIRA Demo for Integrations	PR1399	Zywiec, David	Sep 6, 2023	Mar 13, 2026

View: My Favorite View Save

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 (settings) is visible in the top right of the table area. The 'View Options' panel is open on the right, showing settings for the 'Grid' view. At the bottom of this panel, the 'Manage Picklists' link is highlighted.

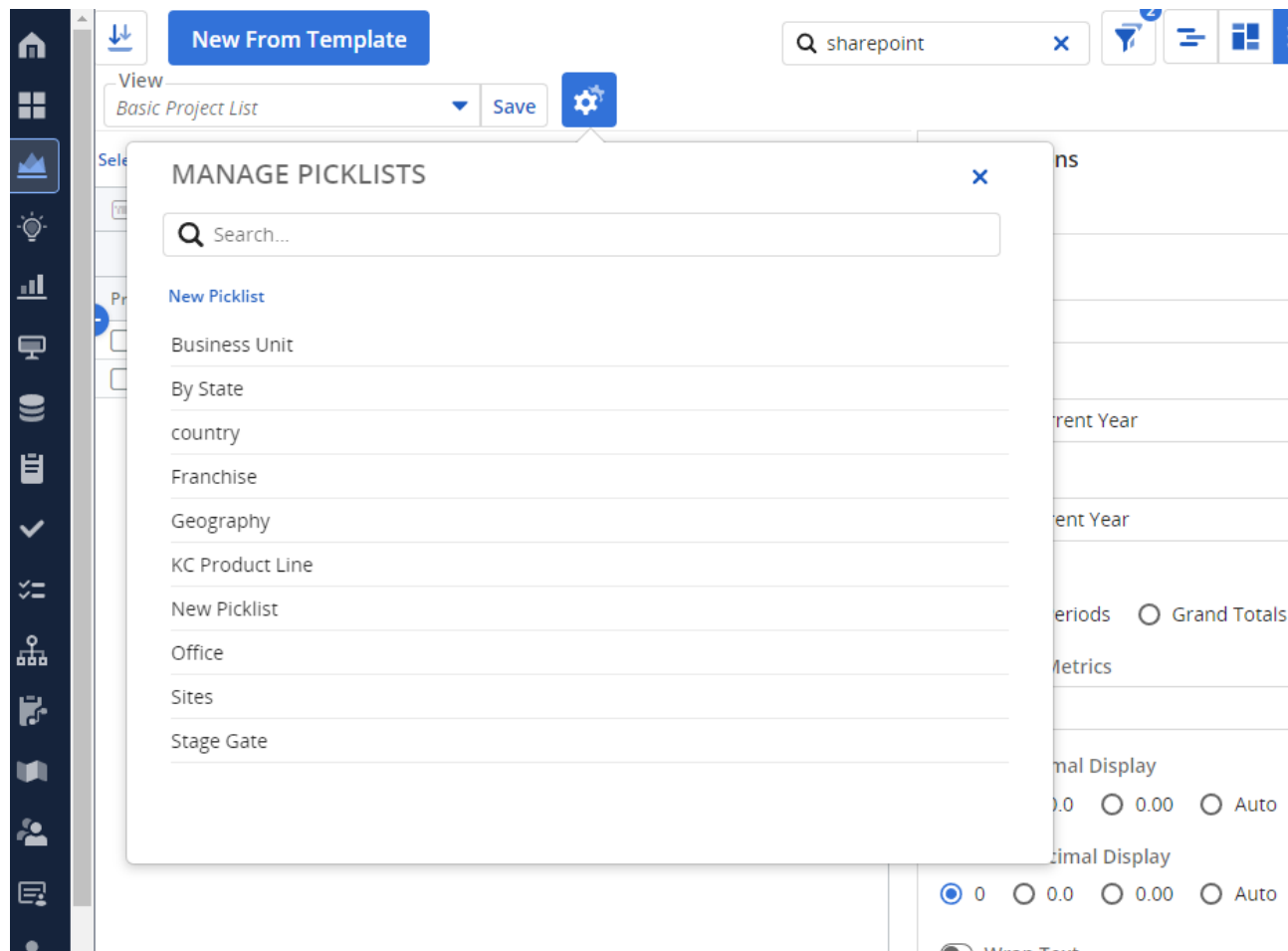
Project Type	Project ID *	Project Name * ↑
☐	PR1332	Regolink SharePoint Sites Imple
☐	PR1315	SharePoint sites enablement

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](#)

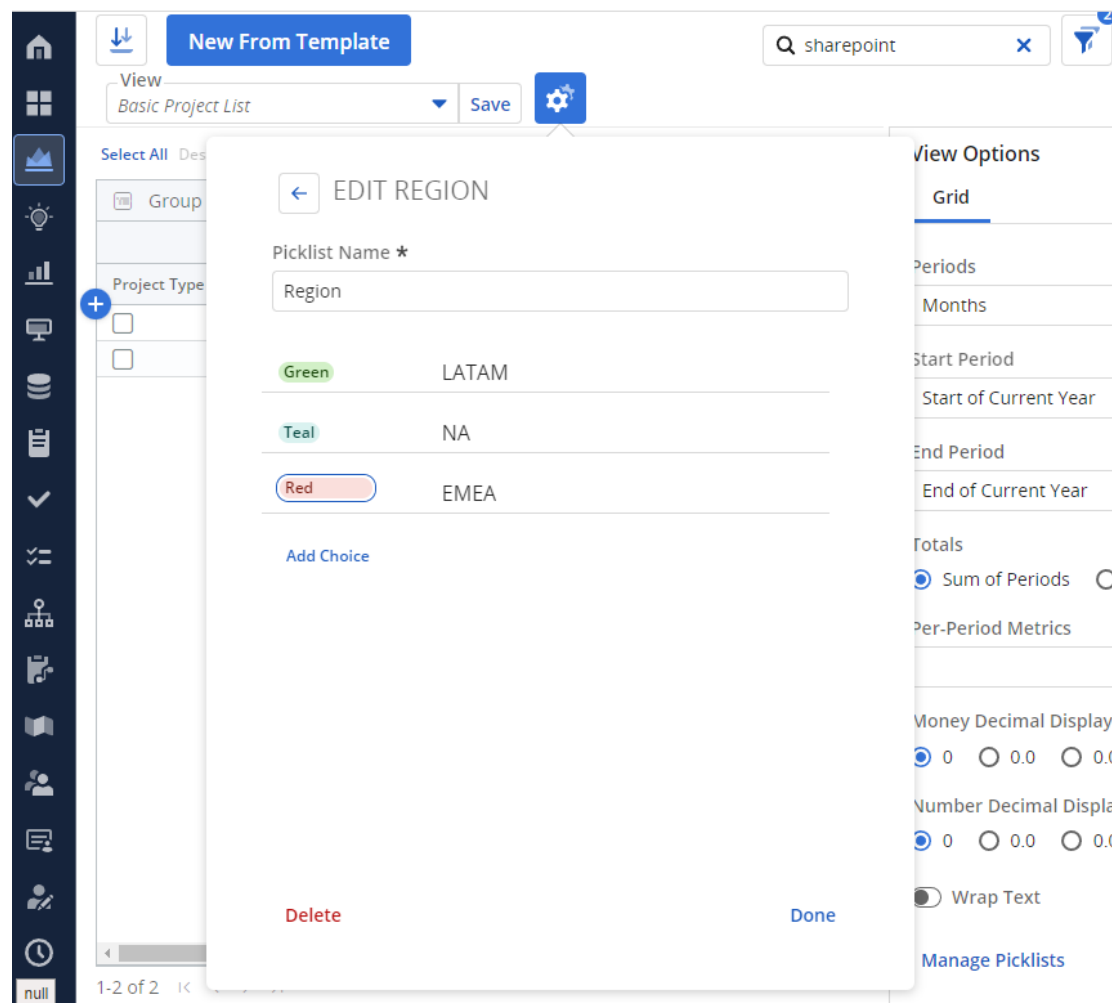
Creating a Picklist

- 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 shows the Clarity Projects 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 'share'. A 'View' dropdown menu is set to 'Basic Project List' with a 'Save' button and a settings icon. 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.

Project Type	Project ID *	Project Name *	Manager	Region
☐	PR1332	Regolink SharePoint Sites Implementa...	Administrator, Clarity	LATAM
☐	PR1315	SharePoint sites enablement	Henao, Julian	NA

Questions?



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