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# Clarity Modern UX Migration Tactical Checklist

**Clarity**<sup>™</sup>  
by Broadcom



# Modern UX Configurations (1 of 5)



ID	Activity	Description
C1.1	Enable attributes that are to be exposed in the Modern UX with an API ID.	<ul style="list-style-type: none"><li>• API ID should follow the convention: 'c_&lt;attribute id&gt;'. This includes OBS attributes as well. This may require an update to previously (15.6) set API IDs.</li><li>• Once set, these should not be modified as it could leave orphaned fields on a blueprint.</li></ul>
C1.2	Update attribute names to align with expected field label.	<ul style="list-style-type: none"><li>• The Modern UX uses the Attribute-level field labels, which may or may not match the View-level field labels from Classic.</li><li>• For the pilot, these name changes should not be published (i.e., blue arrow) as that would overwrite the labels in Classic views.</li><li>• Note that some OOTB attribute names cannot be changed (e.g., Goal).</li></ul>
C1.3	Add color mapping to lookups.	In cases where a lookup may be used in a Modern UX "Color By" view, color mapping needs to be defined in Studio.
C2.0	Enable investment subobjects for display in the Modern UX.	<ul style="list-style-type: none"><li>• Set API Enabled = Yes for all investment subobjects that are to be presented as modules (i.e., tabs) in the Modern UX.</li><li>• Subobjects to subobjects likely require a Channel.</li></ul>

# Modern UX Configurations (2 of 5)



ID	Activity	Description
C3.1	Establish one or more Blueprints.	<ul style="list-style-type: none"><li>• Create and configure one or more Blueprints.</li><li>• Start with a copy of the standard Project Blueprint.</li></ul>
C3.2	Define field-level security for projects and ideas.	
C3.3	Define and implement channels and pages.	<ul style="list-style-type: none"><li>• Up to 15 channels can be established for a given Blueprint.</li><li>• The following parameters are available:<ul style="list-style-type: none"><li>○ Project Code: <code>\$_code</code></li><li>○ Project ID: <code>\$_internalID</code></li><li>○ Project Manager: <code>\$_manager</code></li><li>○ User Name: <code>\$_userName</code></li><li>○ Project Name: <code>\$_name</code></li></ul></li><li>• Channel page tags for Phoenix UI :<ul style="list-style-type: none"><li>○ Hide the extra menu: <code>&amp;puiFullscreen=on</code></li><li>○ Hide the project specific menu: <code>&amp;puiHidePPMTabs=on</code></li></ul></li><li>• Use dynamic URL: <code>./.././.././niku/nu</code></li></ul>
C4.0	Configure Menu links.	Can be configured for internal or external non-investment-specific pages or sites.

# Modern UX Configurations (3 of 5)



ID	Activity	Description
C5.0	Review need for “heavy” create screens.	Re-evaluate the use of create screens in Classic that are loaded with attributes. Given the streamlined, grid-view create process – especially for subobjects like risks, issues, and changes – try to shift to a minimum set of required fields and use the Details flyout to capture additional information.
C6.0	Associate existing templates with a Blueprint.	<ul style="list-style-type: none"><li>• As appropriate, leverage To Dos to solve schedule granularity challenges.</li><li>• If you have several templates, recommend that you update the templates and assign each one a different banner color so they’re easily distinguished in the tile view.</li></ul>
C7.0	Configure background settings to support Staffing module.	<ul style="list-style-type: none"><li>• As necessary, use the OOTB job to convert mixed bookings.</li><li>• Schedule the job “Populate Management Resource Curves” if using staffing.</li><li>• Ensure that Booking Status and Request Status on the Team object have default values.</li></ul>

# Modern UX Configurations (4 of 5)



ID	Activity	Description
C8.0	Evaluate Actions Menus	<ul style="list-style-type: none"><li>• The Actions Menu is not accessible in the Modern UX, but you can use attribute changes as a trigger.</li><li>• Avoid using Booleans for this purpose – they are too easy to click or touch on a touch screen.</li><li>• Try using a lookup with values like “Action: [describe action here]”.</li></ul>
C9.0	NPIOs	<ul style="list-style-type: none"><li>• Products, Assets, Portfolios, Applications, Other Work and Programs are not supported or not fully supported in the Modern UX.</li><li>• Other Work is available in Staffing and on Timesheets.</li><li>• Consider replacing Products, Assets or Applications with Custom Investments.</li></ul>

# Modern UX Configurations (5 of 5)



ID	Activity	Description
C10.0	Configure and save default list and flyout views.	<ul style="list-style-type: none"><li>• Add 'View management – administrator' access right to administrator groups.</li><li>• Includes all list views and flyouts for objects and subobjects.</li></ul>
C11.0	Create a Modern UX Pilot security group.	Group should include individual global right to the modules of interest in the Modern UX.
C12.0	Introduce Modern UX link from Classic.	Optionally, create a menu link or portlet w/ button that allows users to navigate to the Modern UX from Classic. User with appropriate permissions can also access directly via the URL.
C13.0	Validate that users are no longer using IE to access Clarity.	IE is no longer supported in the Modern UX. Users should move to Chrome, Firefox, or Edge.
C14.0	Consider replacing stock action items with custom emails that have links directly into the Modern UX.	The stock object-based action items include a link to Classic screens. A basic gel-script email can be used instead that links the user directly to a Modern UX screen.