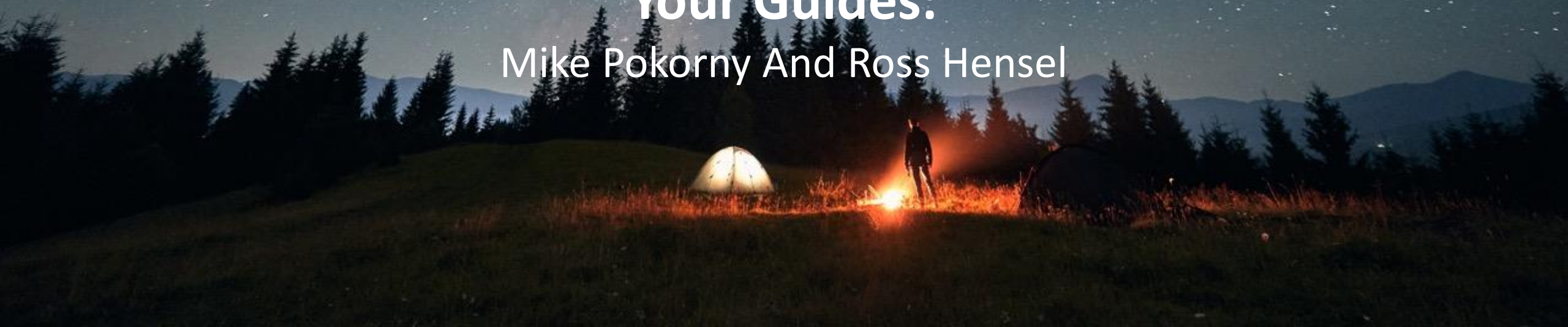




Migrating To The Modern UX | Best Practices And Lessons Learned

Your Guides:

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Agenda



Start with Why

Modern UX
Misconceptions
Making the Case



Strategies

Crawl-Walk-Run
Introspective Evaluation
Migration Paths



Planning the Pilot

Logistics
Considerations



Tactical Checklist

Required Activities
Best Practices

Part I: Why?



Let Rego be your guide.

What is (and isn't) the Modern UX?

There are often misconceptions about Clarity's Modern UX (User Experience), especially for companies that have lived in the Classic UX for years.

It is...

- The primary focus of Broadcom's R&D investment and has been for the last few years.
- Available side-by-side with Classic. Except for Timesheets, users can toggle between the two experiences. Noting support considerations, of course.

It is not...

- A replacement for Classic. Broadcom approached development of the Modern UX as a PPM innovation and did not port all capabilities like-for-like.
- Only a "look and feel" change. The way in which users interact with the application as well as the core functionality has been reimaged.
- New. The Modern UX was originally introduced in 15.1. It has, however, evolved significantly through the latest release 15.9.3.

What we're seeing...

- Given the three-month release cycle, most companies are not aware of the latest capabilities or the fact that the Modern UX can be turned-on in stages.
- The perception of oversized change management and loss of functionality is paralyzing.
- Companies that are newer to Clarity have been able to move over more quickly, but most organizations still find themselves needing elements of Classic UX.
- Larger companies with heavy configuration have been waiting to move to the Modern UX until certain features they need are migrated.



Attend Rego's "What's New in 15.X" webinars to familiarize your organization with the latest release.

Looking for a full review of the Modern UX? Attend Broadcom's "Modern UX End-to-End" demo series. Last Tuesday of every month! Email clarity@broadcom.com.

Make the Case

Remember, all future innovation will be in the Modern UX.

- Common Grid, Board, and Timeline Views
 - Acknowledge the gaps in Classic:
 - Inability to share views
 - Difficult to configure columns/filters
 - Copy/Paste
- Blueprints
 - Utilize Blueprints for phases, types of projects, areas of the organization
 - Sample:
 - Initiation requires x fields but no team members
 - Execution requires x fields
 - Closure requires x fields and the lessons learned module
- Timesheet Users
 - Exportable Timesheet View
 - Mobile Timesheets
- Project Manager Flexibility
 - Several ways to view Tasks tailored to the style of project methodology
 - Customize Picklists per project w/o Admin
 - Conversations for quick chats with team members
 - To Dos to capture items that don't necessarily equate to a task
- Roadmaps and Hierarchies
 - Visualize investments in Timeline or Hierarchical view
 - Combine many type of investments in both modules
 - Set Targets, provide roll-ups, and quickly adjust views to pivot slicing the data

Part II: Migration Strategies



Let Rego be your guide.

Crawl-Walk-Run Approach to the Modern UX

- Our most common UX consulting engagement is to develop a “roadmap” for the best path from Clarity Classic to 100% Modern UX.
- Not all customers are able to go 100% Modern UX – in some cases process changes are needed, in other cases a concerted focus on change management – but they want a plan.
- You do not have to adopt the Modern UX fully to start taking advantage its great features.



Migration Tactics

- **Big Bang**

- Shift all modules to the modern UX at once
- Large training/change management impact
- Simplified approach with one UI
- Ability to coordinate with a rebranding
- Try to migrate existing modules and introduce something new (ie Roadmaps) so they don't feel like it's a lift-and-shift
- Try not to bundle with large organization changes. The change management is too much.

- **Incremental**

- Phased approach by role, module, or group
 - Move all PMs vs move R&D PMs
- Controlled training/change management
- Exist in two UIs
- Ability to control and refine for a full deployment

Migration Paths

At this point, most show-stopping gaps have been addressed and you can begin a migration plan. Start by asking the following questions:

Role or Team Based Migration

- Can an entire user group migrate to the Modern UX?
- Is there a division within your organization that uses less functionality in Classic and the Modern UX fits well?
- Are all their functionality responsibilities available in the i.e. Modern UX?
- Is there a user group that needs a “refresh” of the tool?

Functionality Based Migration

- Can we utilize the Modern UX for some functionality while still remaining in Classic UX with minimal user disruption? (e.g., utilize Roadmapping for strategic planning)
- Is there buy-in for utilizing both Classic and the Modern UX?
- Can we utilize the Phoenix Classic skin or Modern UX channels to ease migration?

Build and follow the Modern UX Roadmap based on the selected migration path or a combination of both to meet your company’s strategic business needs.



If you are finding that your organization is heavily configured, complete a functionality assessment to optimize configuration and migration toward OOTB modules before focusing on the Modern UX.

Example Migration Plan - The Rego Approach

Crawl

Playing in the Sand!

Apply the Phoenix skin to Classic UX to get a fresh look and feel.

Team Members into the Modern UX and utilize Modern UX Timesheets

Portfolio Managers and exec team utilize Roadmapping for strategic planning

Walk

Dive In!

PM's and RM's can toggle between classic and the Modern UX

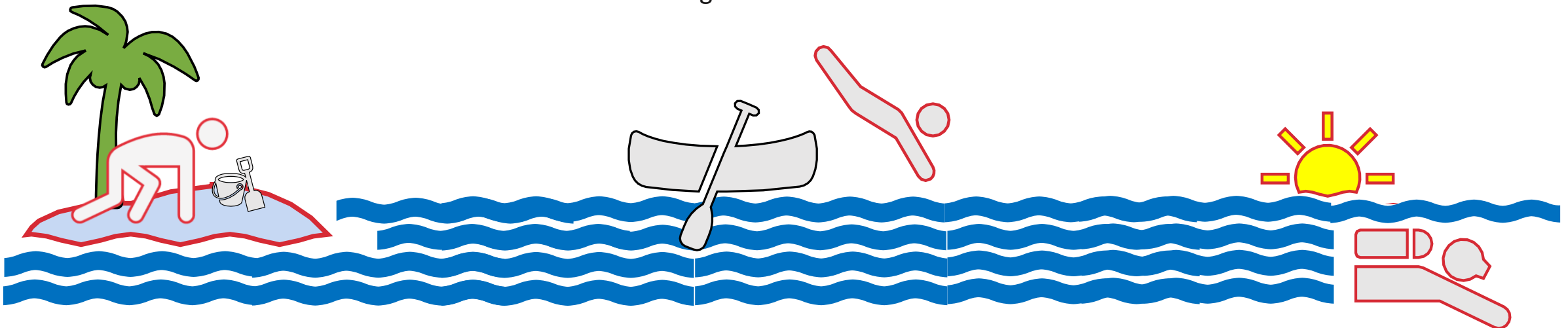
Project Managers into the Modern UX. Utilize channels for custom functionality as necessary

Resource Managers in the Modern UX. Utilize the Staffing module for Planning.

Run

Explore the depths of the ocean!

All Team Members including Project Managers, Resource Managers, and Portfolio Managers are exclusively utilizing the Modern UX with minimal exposure to Classic capabilities (e.g., Pages for portlet-based dashboards, links to Resource List).



Part III: Planning the Pilot



Let Rego be your guide.

Planning the Pilot

Define Pilot logistics.

- What Modern UX modules are included in the pilot?
- What resources / teams are included in the pilot?
- What kind of training will be provided?
- Cadence for feedback sessions?
- Mechanism for documenting and tracking feedback?
- Duration of pilot and go/no-go criteria?

Identify what minimum set of configurations are needed.

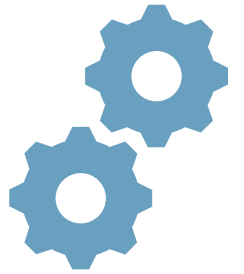
- What object attributes, subpages, and subobjects should be presented in the Modern UX?
- Use this exercise as an opportunity to rationalize fields and only expose those elements that are still being used or providing value.

Part IV: Tactical Checklist



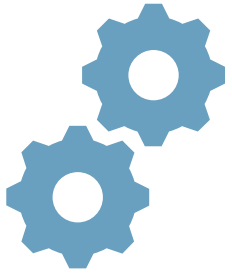
Let Rego be your guide.

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">API ID should follow the convention: 'c_<attribute id>'. This includes OBS attributes as well. This may require an update to previously (15.6) set API IDs.Once set, these should not be modified as it could leave orphaned fields on a blueprint.
C1.2	Update attribute names to align with expected field label (15.9.2 and earlier).	<ul style="list-style-type: none">The 15.9.2 and prior releases use the Attribute-level field labels, which may or may not match the View-level field labels from Classic.In 15.9.3 and later, you may adjust field names in the modern UX for most objects.
C1.3	Add color mapping to lookups.	<ul style="list-style-type: none">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">Set API Enabled = Yes for all investment subobjects that are to be presented as modules (i.e., tabs) in the Modern UX.Subobjects to subobjects likely require a Channel.

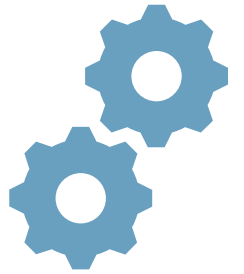
Modern UX Configurations (2 of 5)



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

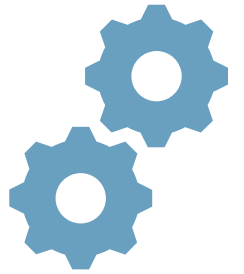
Modern UX Configurations (3 of 5)

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">▪ As appropriate, leverage To Dos to solve schedule granularity challenges.▪ 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.
C7.0	Configure background settings to support Staffing module.	<ul style="list-style-type: none">▪ As necessary, use the OOTB job to convert mixed bookings.▪ Schedule the job “Populate Management Resource Curves” if using staffing.▪ Ensure that Booking Status and Request Status on the Team object have default values.

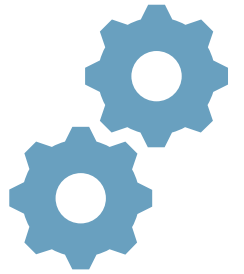


Modern UX Configurations (4 of 5)

ID	Activity	Description
C8.0	Evaluate Actions Menus (15.9.2 and earlier.	<ul style="list-style-type: none">▪ The Actions Menu is not accessible in the Modern UX, but you can use attribute changes as a trigger.▪ Avoid using Booleans for this purpose – they are too easy to click or touch on a touch screen.▪ Try using a lookup with values like “Action: [describe action here]”▪ Actions Menu is available in 15.9.3 for the Project object.
C9.0	NPIOs	<ul style="list-style-type: none">▪ Products, Assets, Portfolios, Applications, Other Work and Programs are not supported or not fully supported in the Modern UX.▪ Other Work is available in Staffing and on Timesheets▪ Consider replacing Products, Assets or Applications with Custom Investments.



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">▪ Add 'View management – administrator' access right to administrator groups.▪ Includes all list views and flyouts for objects and subobjects.
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.

Summary



- Educate yourself on the latest capabilities of the Modern UX. The perception of gaps from Classic may not longer be valid.
- Stay current with your version to take advantage of Broadcom's accelerated release schedule. GCP migration helps!



- Develop a roadmap based on introspective evaluation of As Is and To Be states.
- Remember that it doesn't need to be a big bang, all-or-nothing approach.



- Look for quick wins with Phoenix, Timesheets, Roadmaps, Hierarchies.
- Pilot with a group of PMs, RMs, Team Members to collect real-world feedback.

Questions?



Let Rego be your guide.

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