regoUniversity 2021

VIRTUAL

Configuration/ Administration | Modern UX

Your Guides:

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Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

Agenda

- Introduction
- Enabling Modern UX and Timesheets
- Creating a Link to the Modern UX in the Classic Home Menu
- Creating Blueprints
- Pages
- Attribute Security
- Rules Engine
- Saving Views and Filters for Users
- Enabling Attributes
- Fiscal Time Periods
- Security Rights

Introduction

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 in order to make best use of the Classic and New functionality.

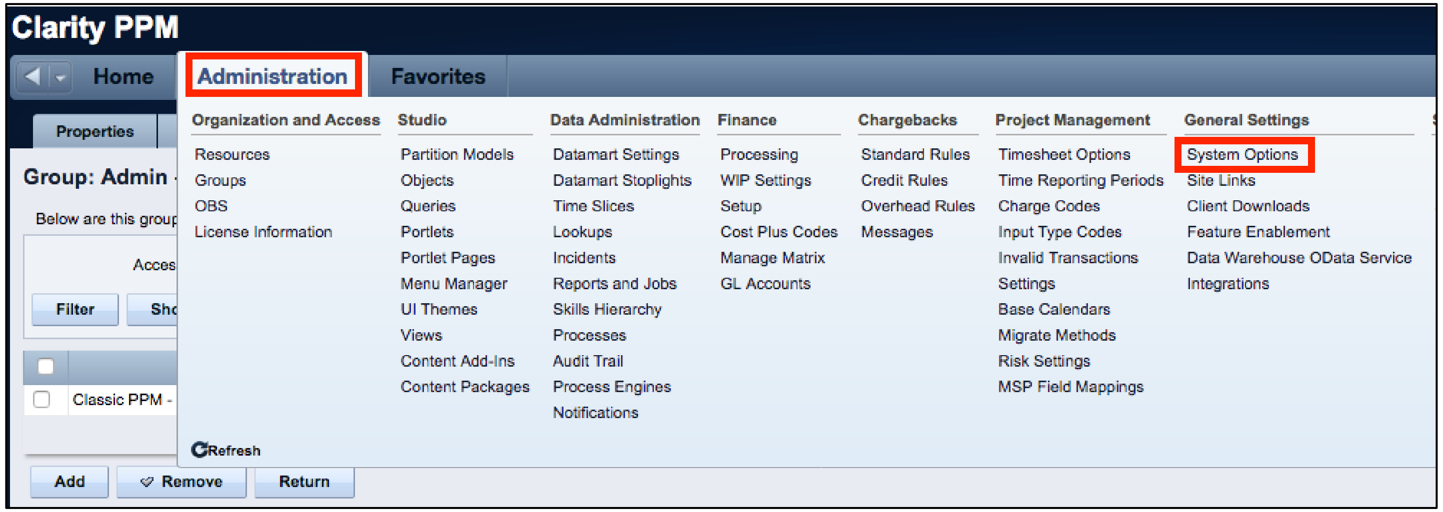
Classic vs. Modern UX

- It is entirely possible to continue using the Classic Clarity UX while beginning to expose portions of the Modern UX to users.
- It's also possible to have an entire organization, or a portion of the organization solely utilize the Modern UX.
- Clarity teams should have a thoughtful discussion before determining their approach.

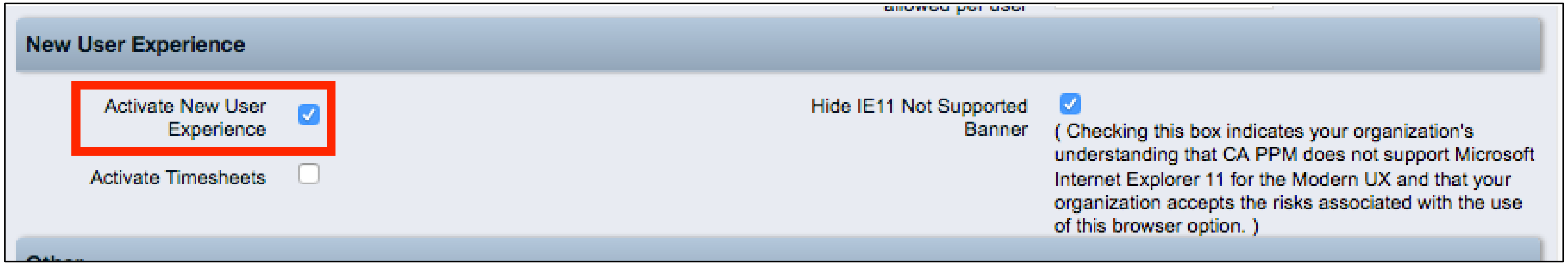
Enabling Modern UX and Timesheets

Activating the Modern UX (1)

- The first step is to enable the Modern UX for end users.
  - Go to Administration -> System Options
  - Scroll down near the bottom of the page

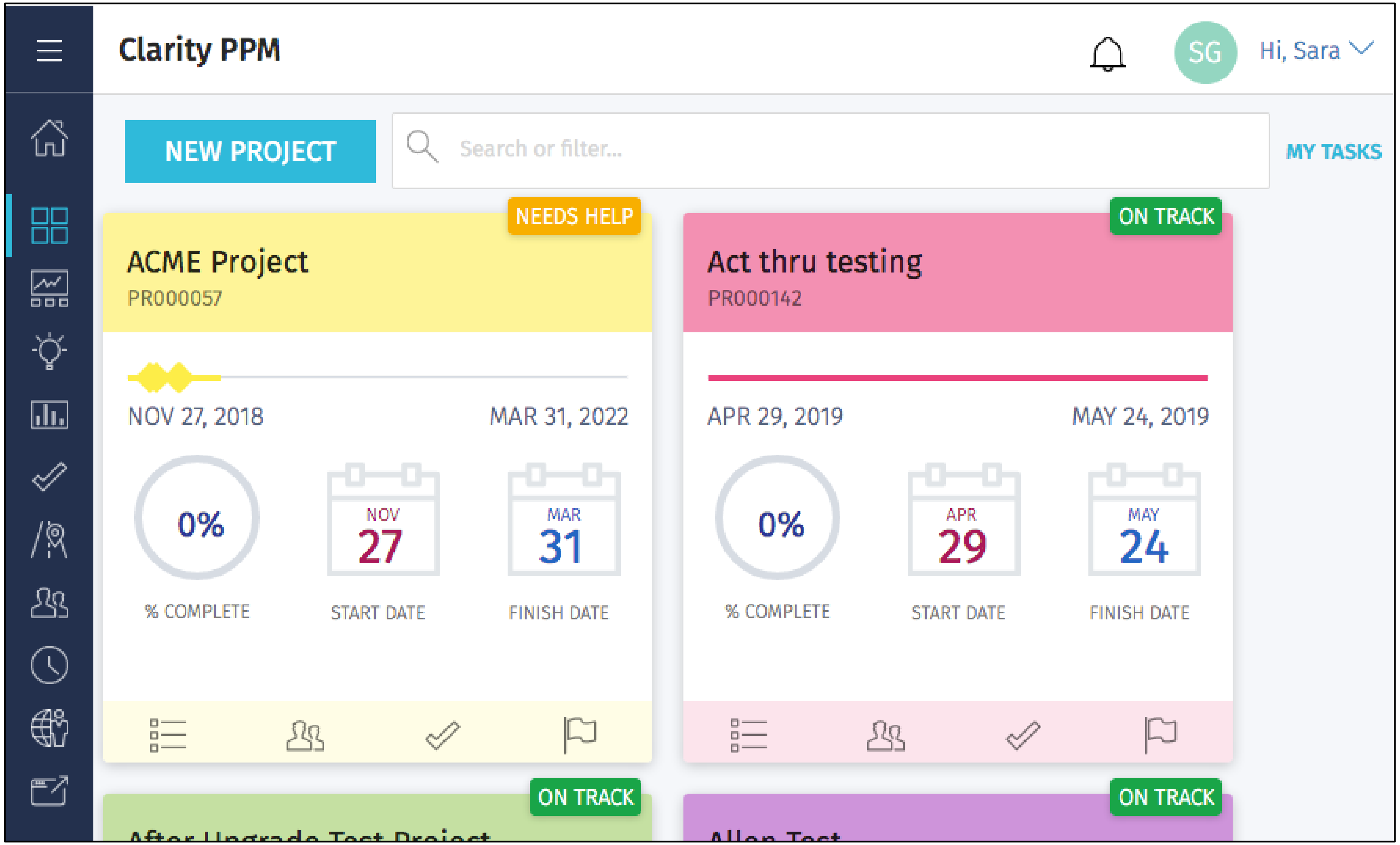


- Check the box to Activate the Modern UX



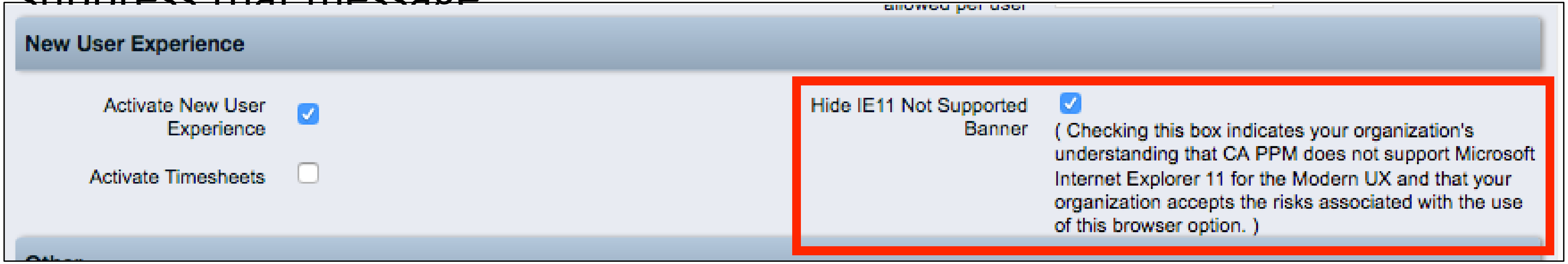
Activating the Modern UX (2)

- Once the Modern UX is activated, the following link will become available:
  - https://[Clarity URL]/pm
- If users will use only the Modern UX, give them this new link to access Clarity.



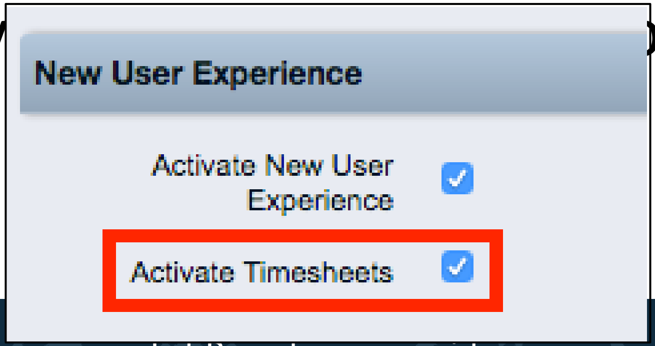
Note on IE 11

- IE 11 is not compatible with the New User Experience. You will want to ensure your organization is using an alternate browser (Edge, Firefox, Chrome, etc.) if you wish to utilize the new Experience.
- If users are using IE 11, they will receive a message indicating the incompatibility. You may check the additional checkbox if you wish to suppress that message.



Activating Timesheets

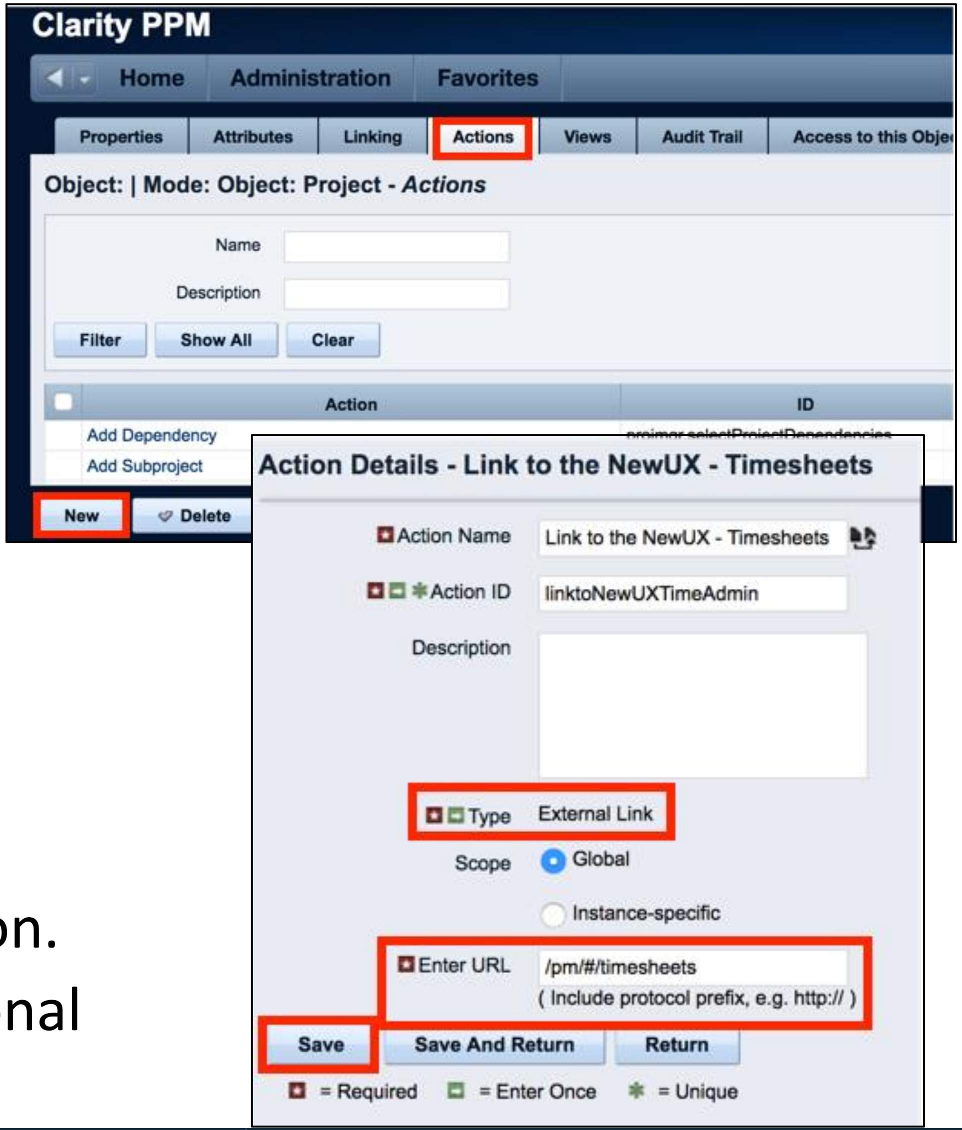
- Modern UX Timesheets can be activated by checking the additional checkbox.
- Once new UX timesheets are activated, the Clock Icon in the quick menu in the upper right corner of the Classic UX disappears as well as the Timesheets link under the Home menu.
- While most Clarity functionality allows users to choose whether they wish to use the New or Classic UX for management, Timesheets are the exception.
- You must decide whether y … n is going to use the new or Classic UX timesheet.



Creating a Link to the Modern UX in the Classic Home Menu

Create a Link in the Home Menu (1)

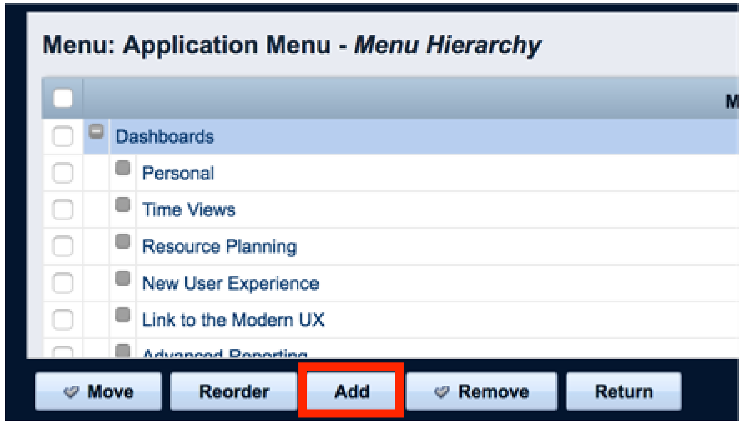
- Once the Modern UX is activated, you may wish to add a link to the Modern UX into the Classic UX Home menu.
  - Navigate to Administration → Objects, then the Project Object.
  - On the *Actions* tab, click the *New* button to create a new Action
  - Populate the information, and include the details for the page you want to be accessed. Ensure that the link is indicated as an *External Link.*
  - Click **Save** or **Save and Return** to create the Action.
  - If necessary, create additional Actions for additional pages (e.g., Timesheets, Staffing, PM, etc.)



Create a Link in the Home Menu (2)

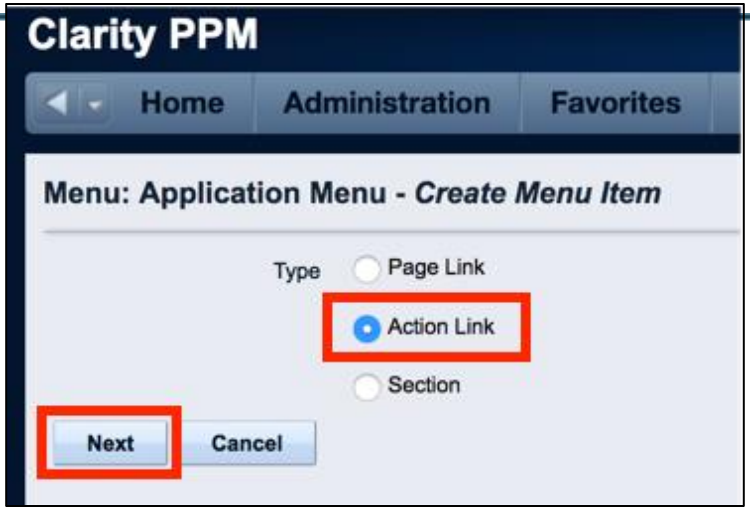
- Now that the Action is created, the next step is to add the link in the Menu Manager.
  - Go to *Administration->Studio->Menu Manager* and select *Application Menu.*

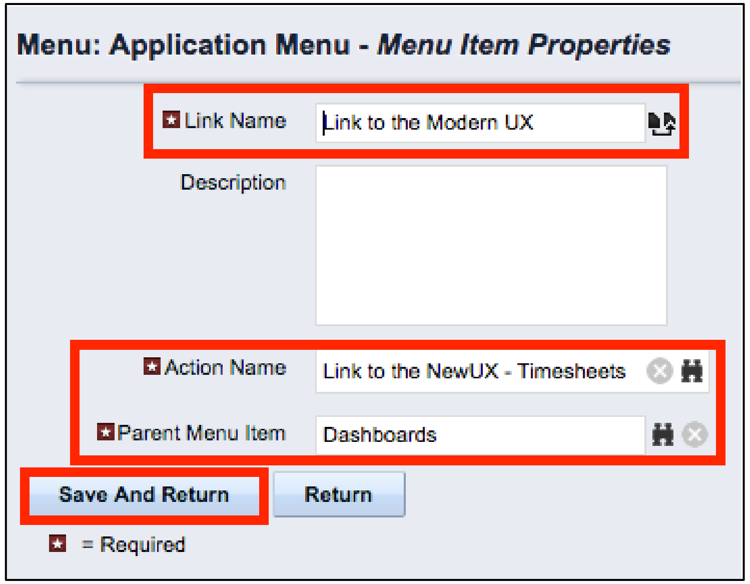
  - Click the **Add** button.



Create a Link in the Home Menu (3)

- Select *Action Link* and click **Next**.
- Populate a Link Name (this is what will appear in the Home Menu), then select the Action you just created in the *Action Link* field. Determine the parent menu item in the menu, then click **Save and Return.**





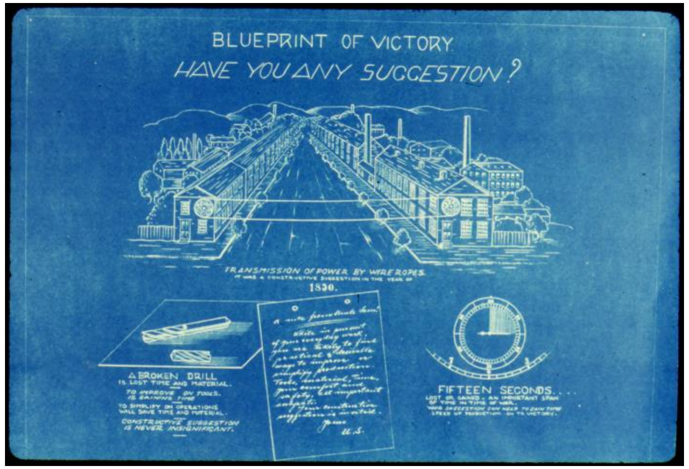
- The link is added to the Menu. You may move it to a different location if necessary.
- NOTE: The links will appear for all users regardless of access.

Managing Blueprints

What Are Blueprints?

Overview

- Blueprints are configurable layouts in the New User Experience for Ideas, Projects and Custom Investment Types
- For Projects:
    - Blueprints are associated to Project Template(s)
    - These tailored views can be created for different project types or organizations
    - Stakeholders see the relevant metrics and key information necessary for the project(s)
        - Attributes
        - Visuals
        - Modules/Tabs
- For Ideas and Custom Investment Types
    - Blueprints are associated to the specific Idea or Custom Investment Type
        - Depending on version, you can Blueprint the Details tab, and include Custom Subobjects or Links.
- Users see the right data at the right time for the right work



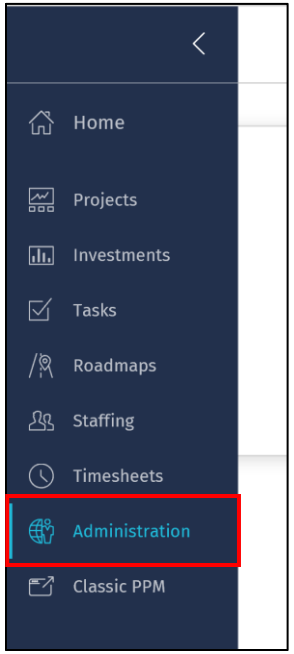
Blueprint Administration

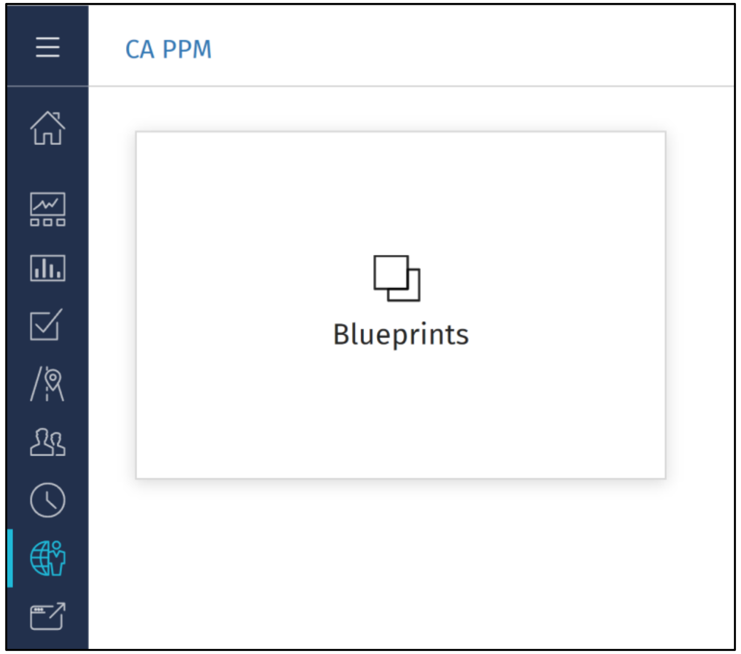
Navigating to Blueprints

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

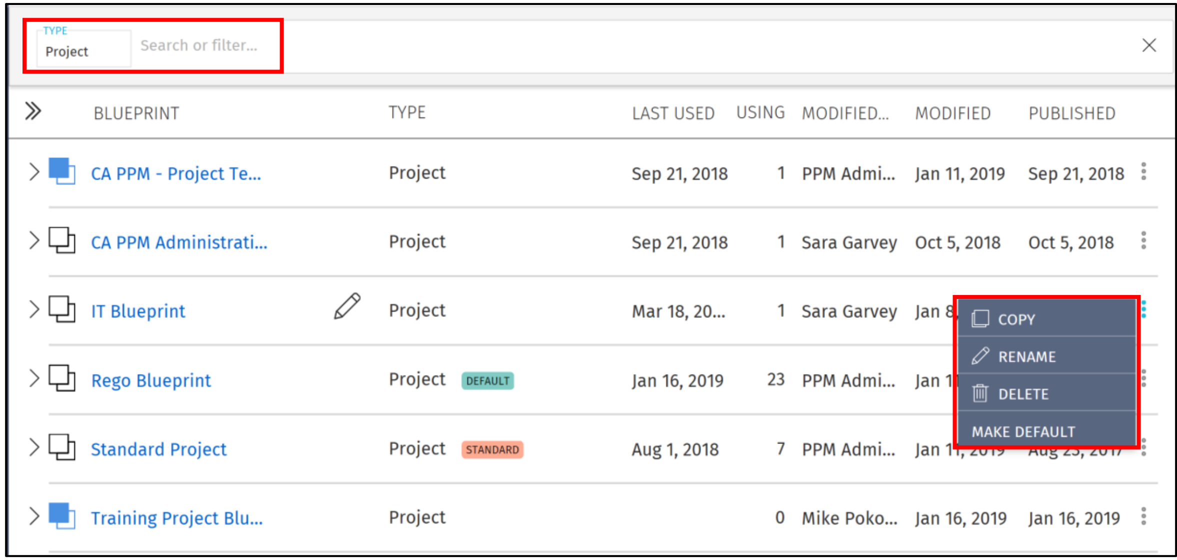




Blueprint Views

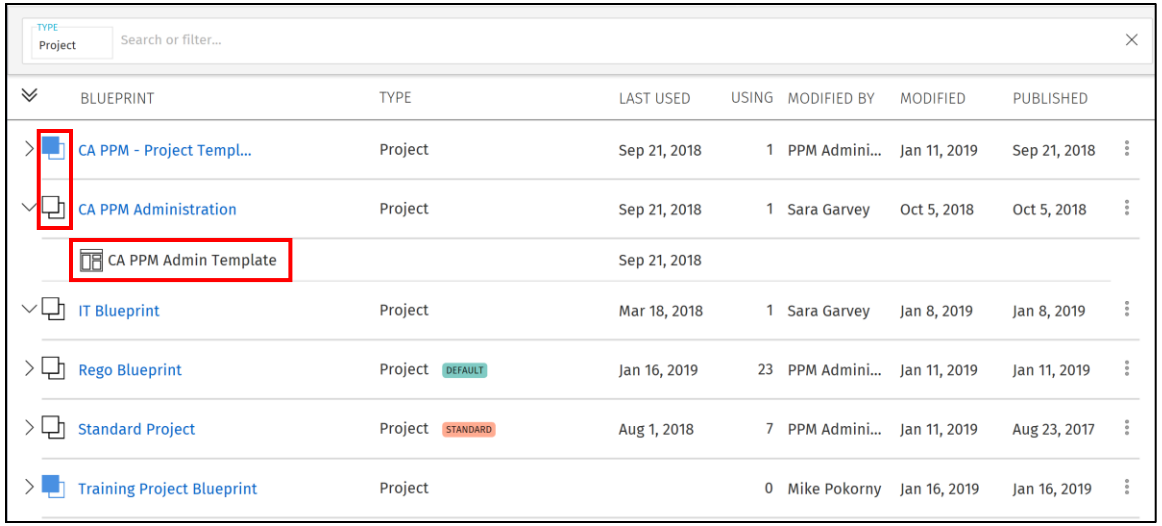
Blueprint List View

- Here you will see a list of all 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 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.

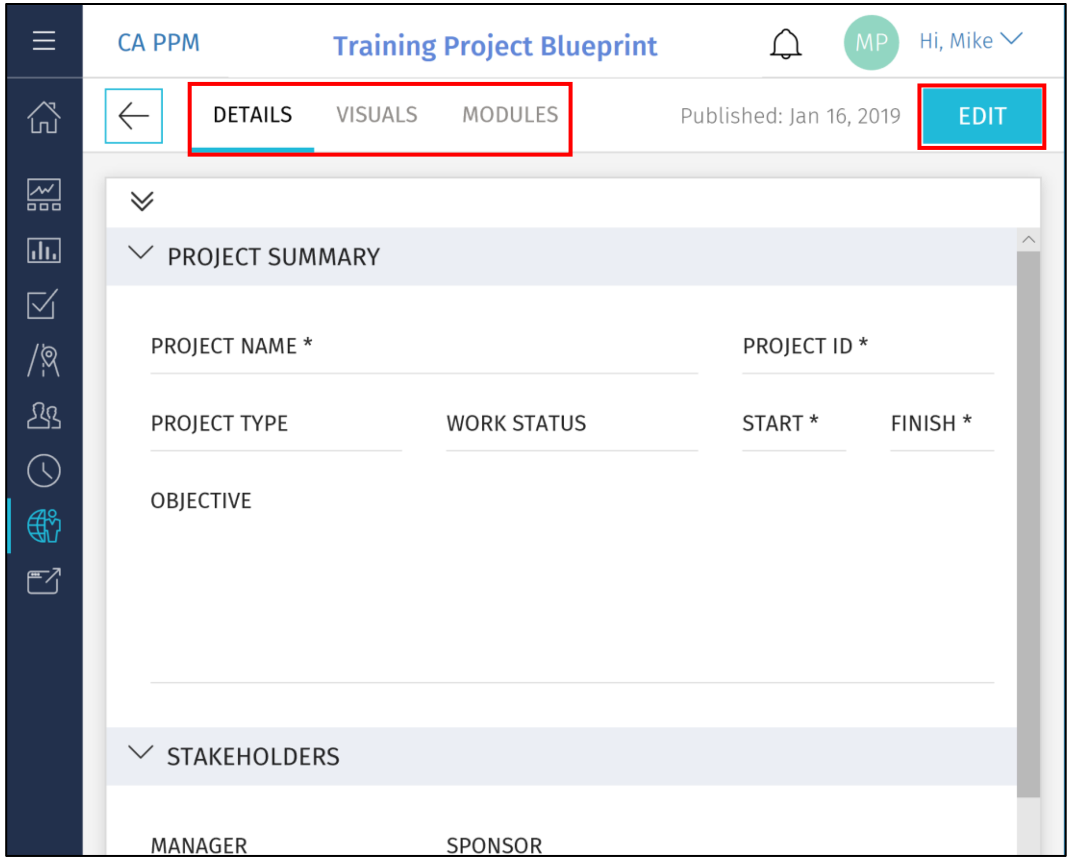


TYPE Project | Search or filter...

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
CA PPM Admin Template		Sep 21, 2018				
IT Blueprint	Project	Mar 18, 2018	1	Sara Garvey	Jan 8, 2019	Jan 8, 2019
Rego Blueprint	Project DEFAULT	Jan 16, 2019	23	PPM Admini...	Jan 11, 2019	Jan 11, 2019
Standard Project	Project STANDARD	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

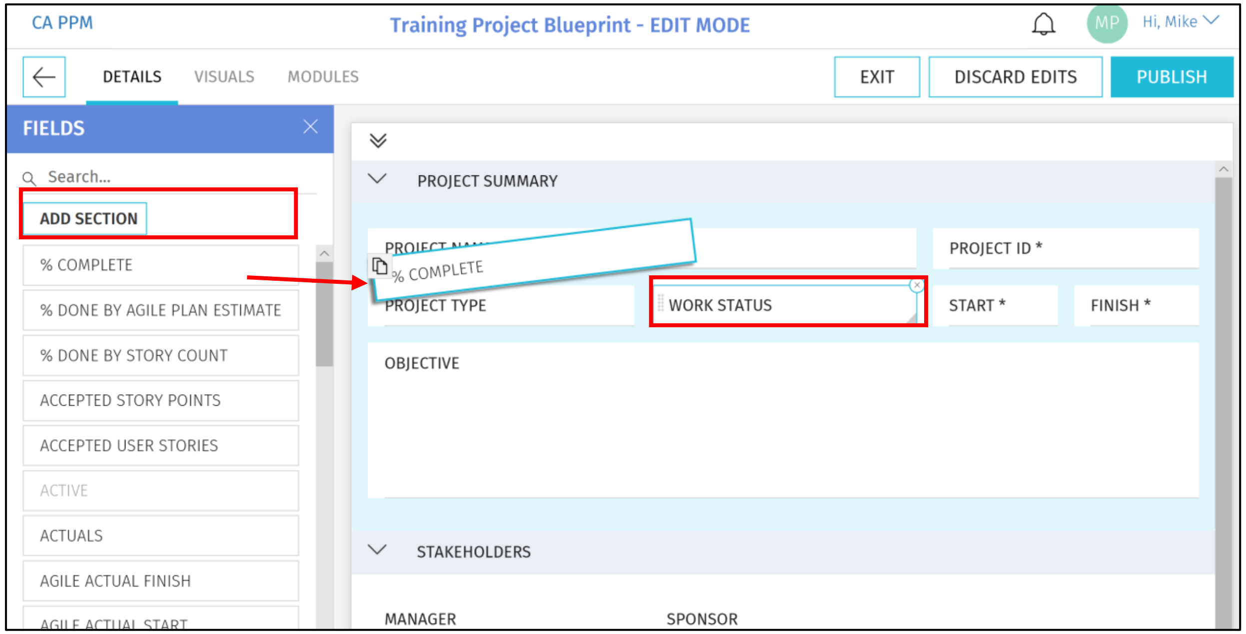
- On Project Blueprints, there are 3 main concepts that can be edited. We will go more in-depth later on these topics.
  - Details – This is the main details or properties page for the Project/Custom Investment Type. Here you can add or remove fields and sections. You can also move and resize fields 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.
  - 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



Blueprint Configuration

Details

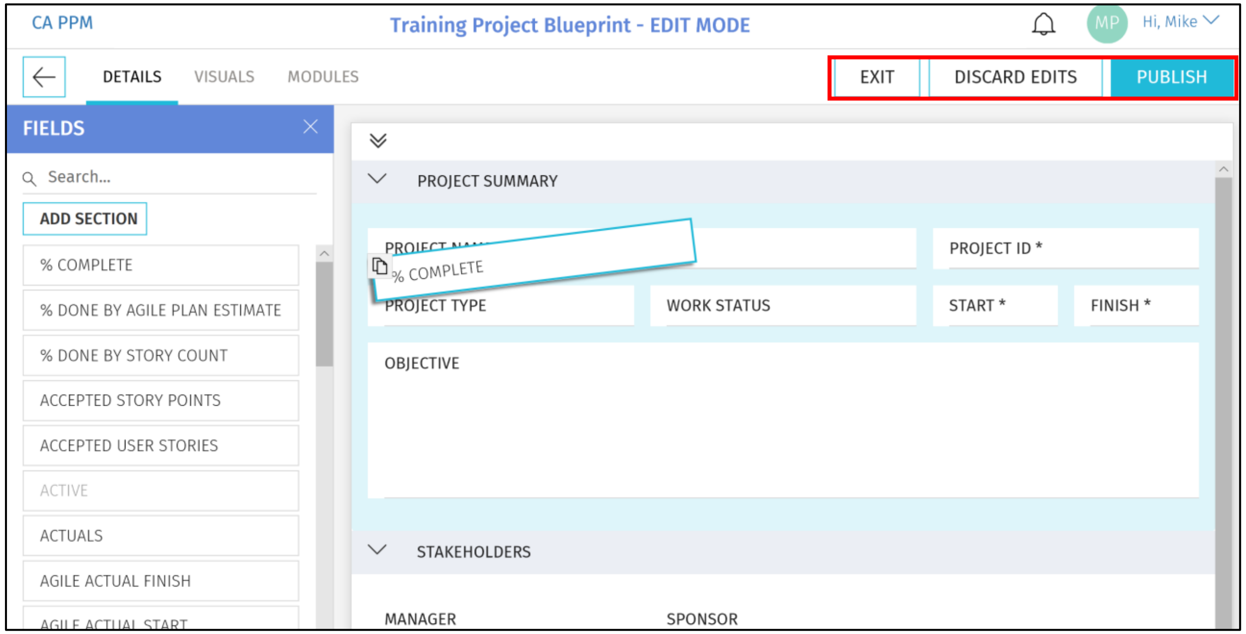
- Fields Pane
  - Location of the fields you can add to the sections of your Details
    - By default it contains a list of out-of-the-box Project and Investment fields
    - Custom fields and sub-objects can be added and will be covered later
  - Fields that already exist on your Blueprint are greyed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

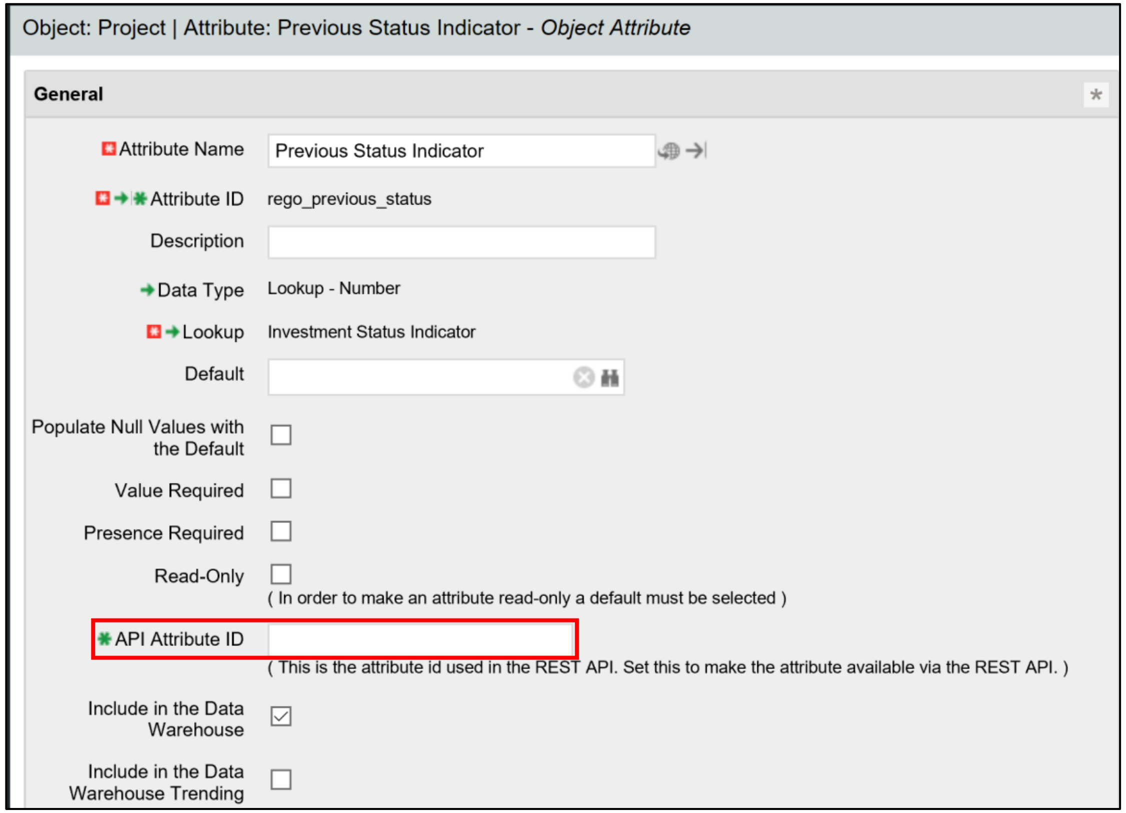
Details cont.

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



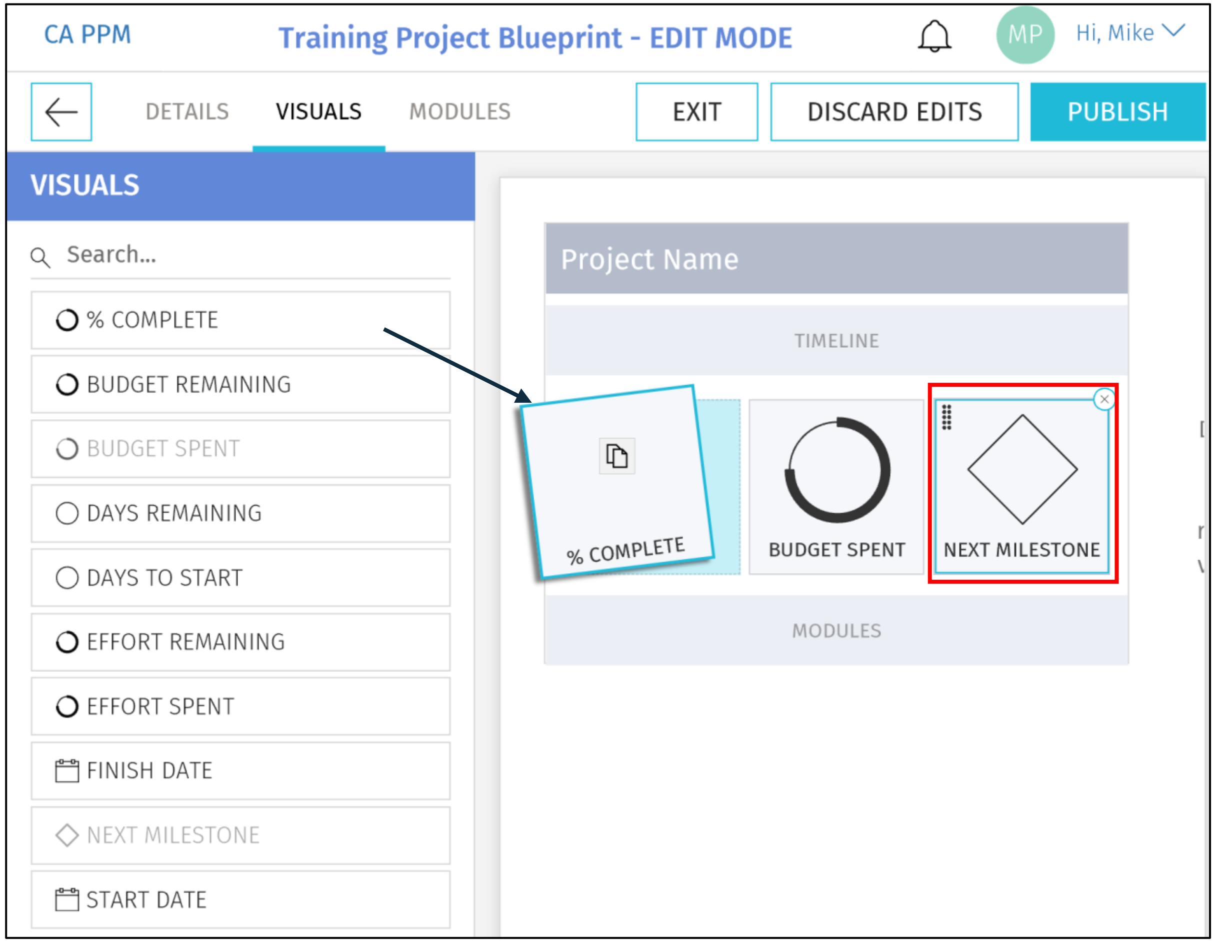
Details cont.

- Custom Attributes can be made available in the Fields list through the attribute properties on the Object in Classic PPM
  - Populate the ‘API Attribute ID’ with a value
  - Once saved, the attribute will be available in the Fields List for the Blueprints
  - It is suggested to make the API Attribute ID similar to the Attribute ID



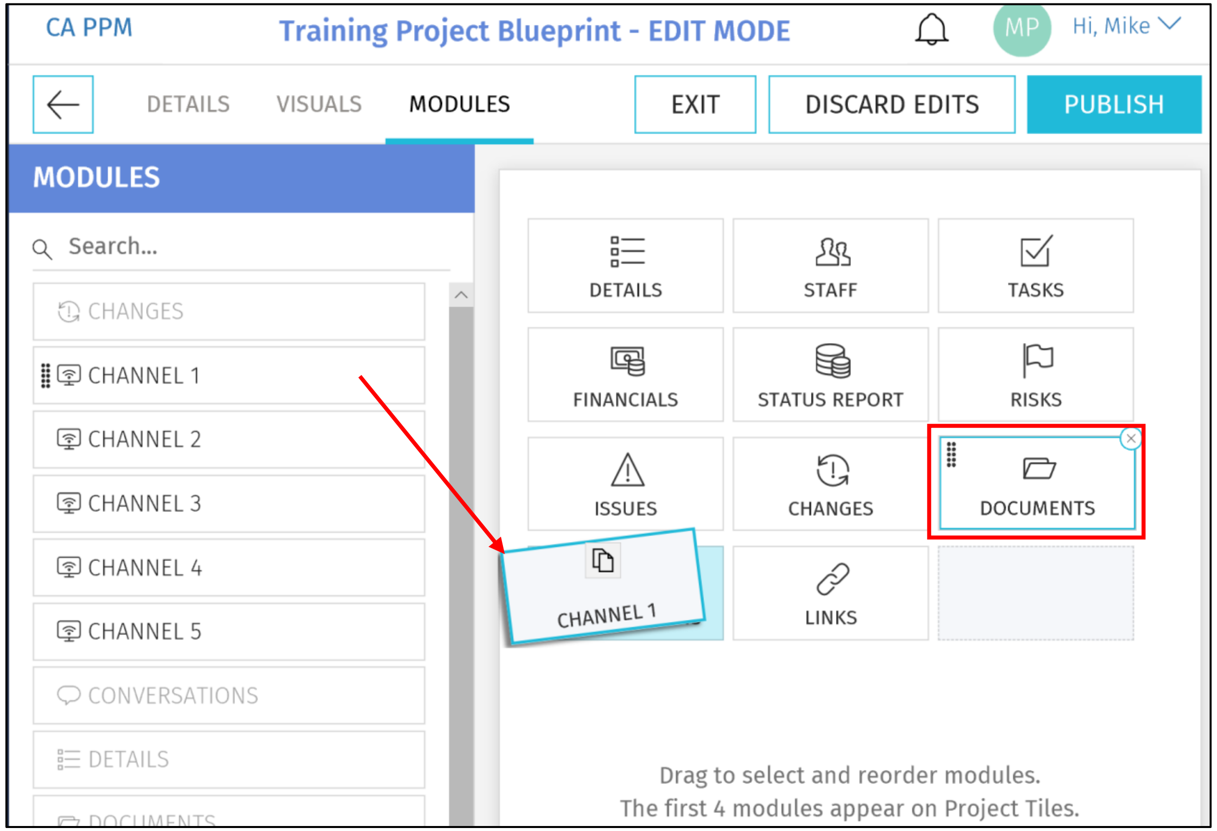
Visuals (Projects Only)

- 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



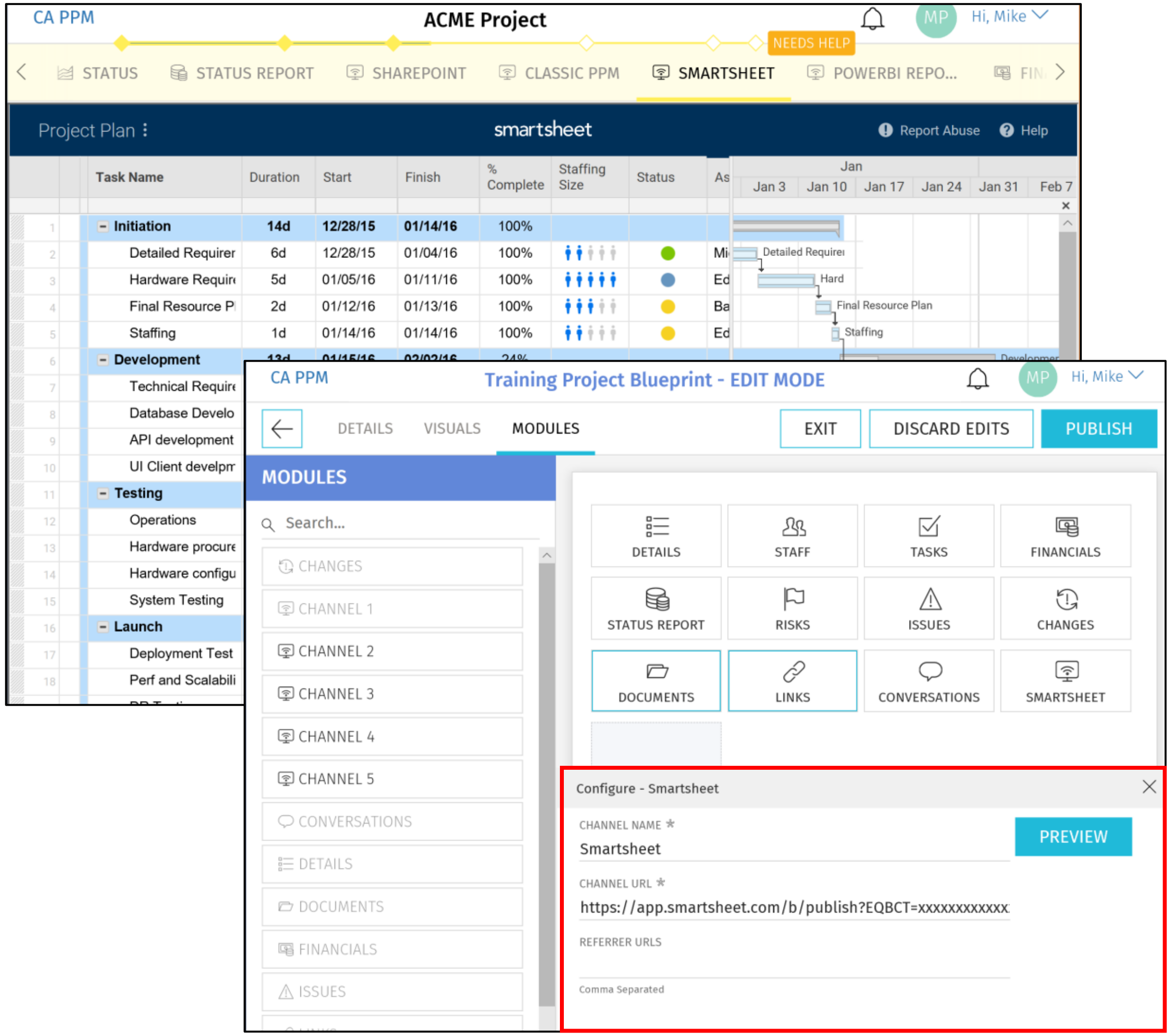
Modules

- 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



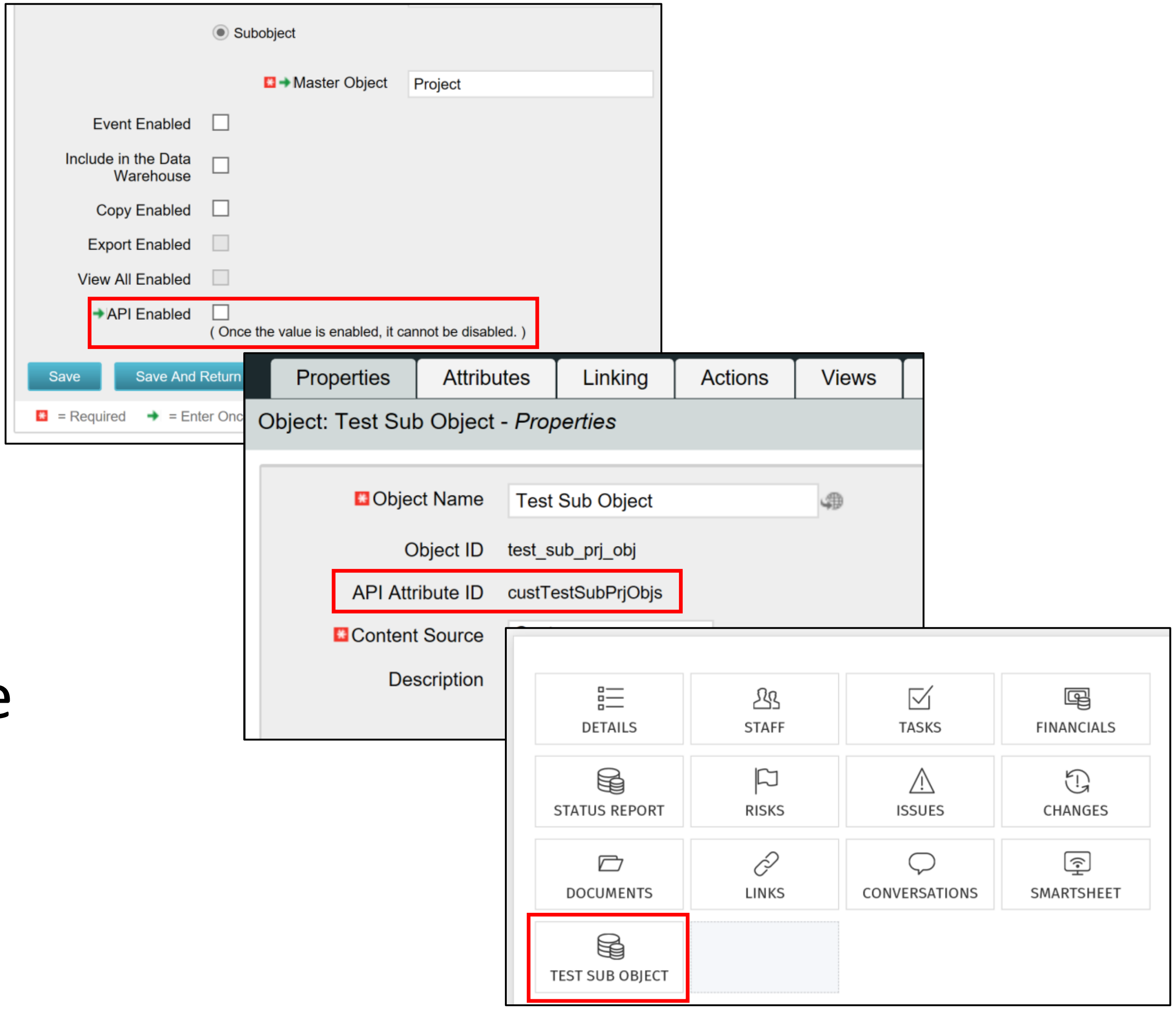
Modules – Channels

- 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



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



Blueprint Rights

- Add the appropriate Blueprint rights to the administration group in the Classic UI administration area.

Group: Admin Training - *Select Access Rights*

Access Right: *blue

Description:

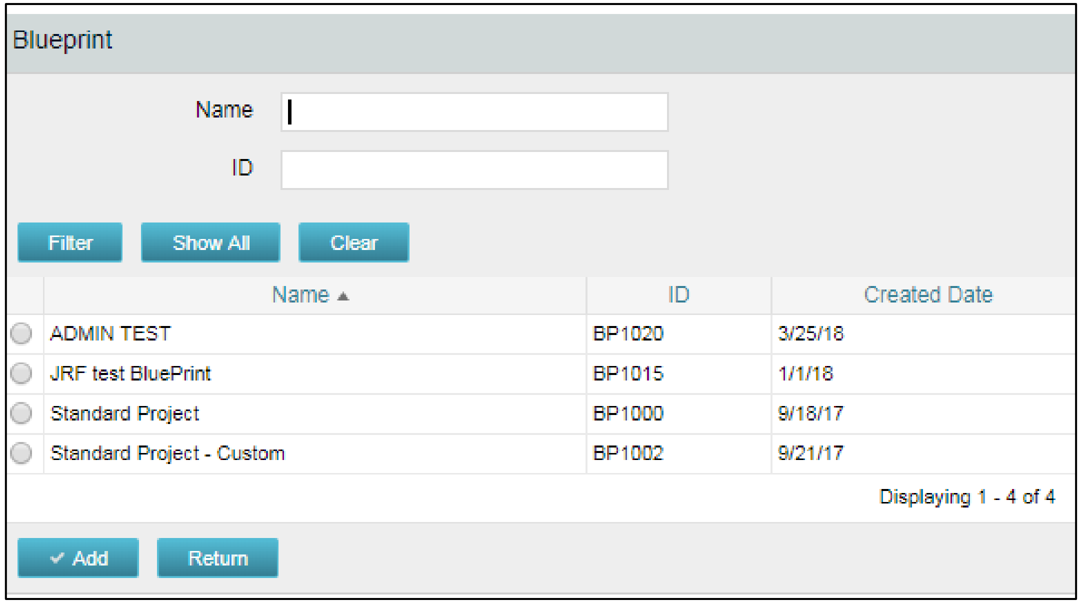
Filter | Show All | Clear

Access Right ▲	Description
Blueprint - Create Copy	Allows user to create a copy of an existing Blueprint. Includes Blueprint - View - All right.
Blueprint - Delete - All	Allows user to delete all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
Blueprint - Edit - All	Allows user to edit all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
Blueprint - View - All	Allows user to view all Blueprints.

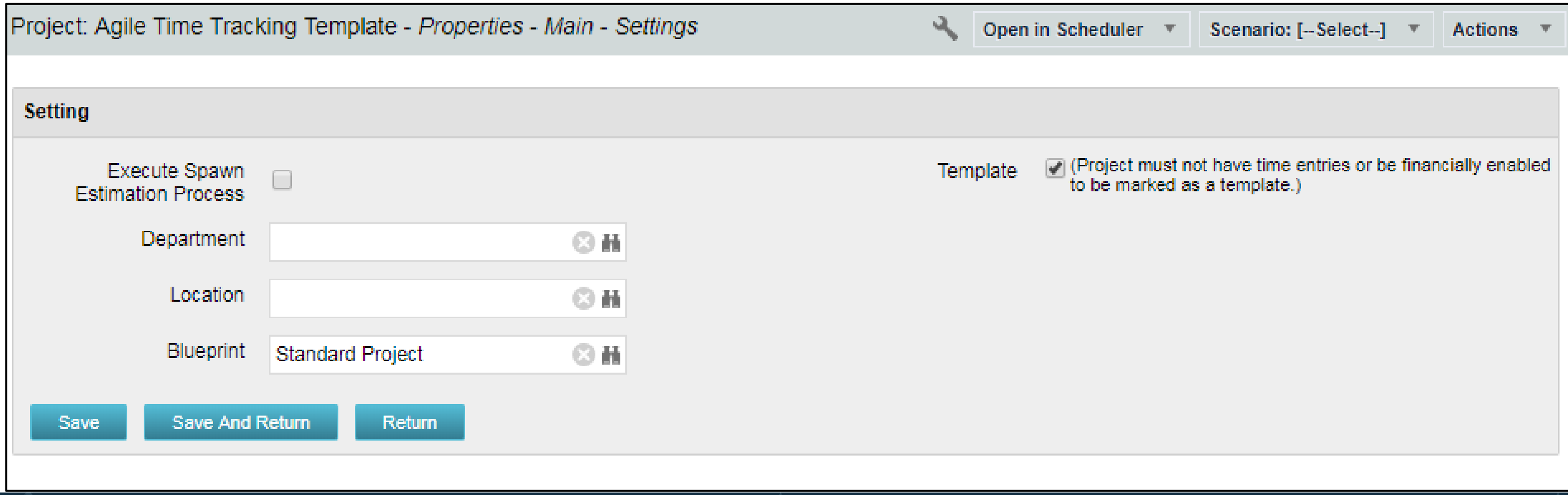
Displaying 1 - 4 of 4

Blueprints

You need to set the Blueprint on each of your templates in the Classic UI. You may need to add the Blueprint attribute to the screen.

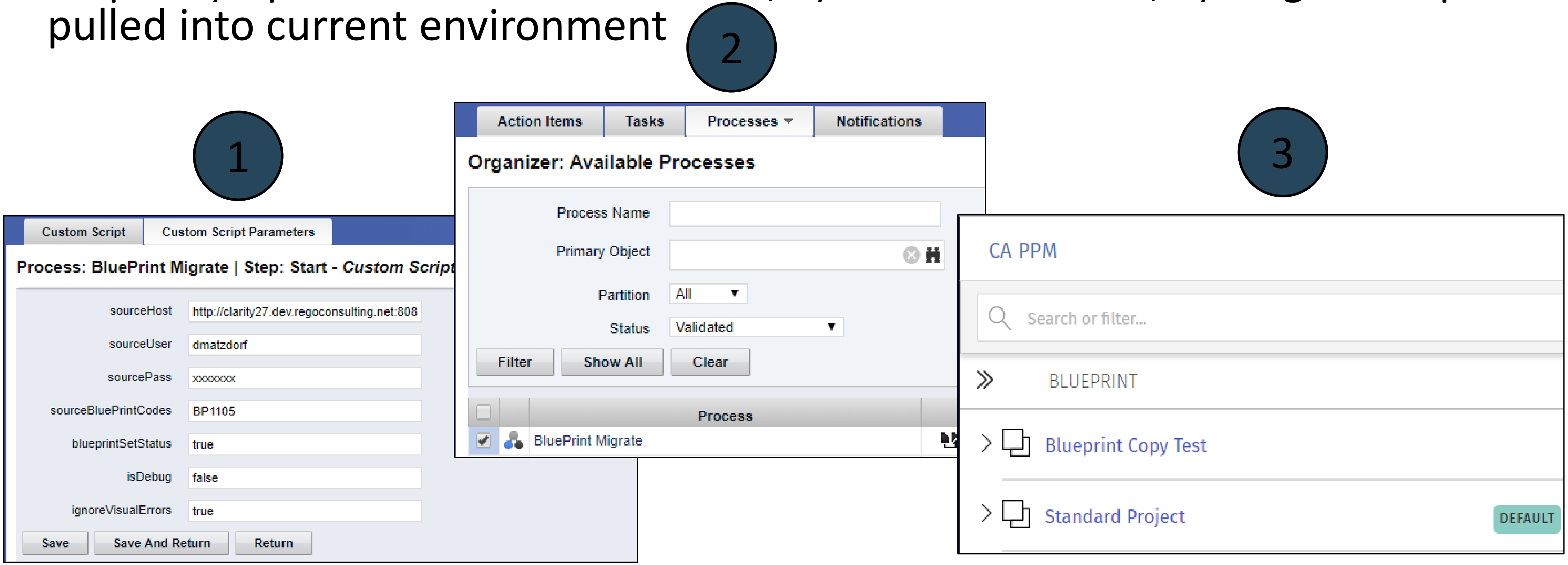


Suggested: Add to the SETTINGS subpage of your projects.



Rego Innovation - Blueprint Migrator

- Migrate Blueprint configuration from one environment with a simple process
- Steps: 1) Update Process Parameters; 2) Run the Process; 3) Target blueprint pulled into current environment

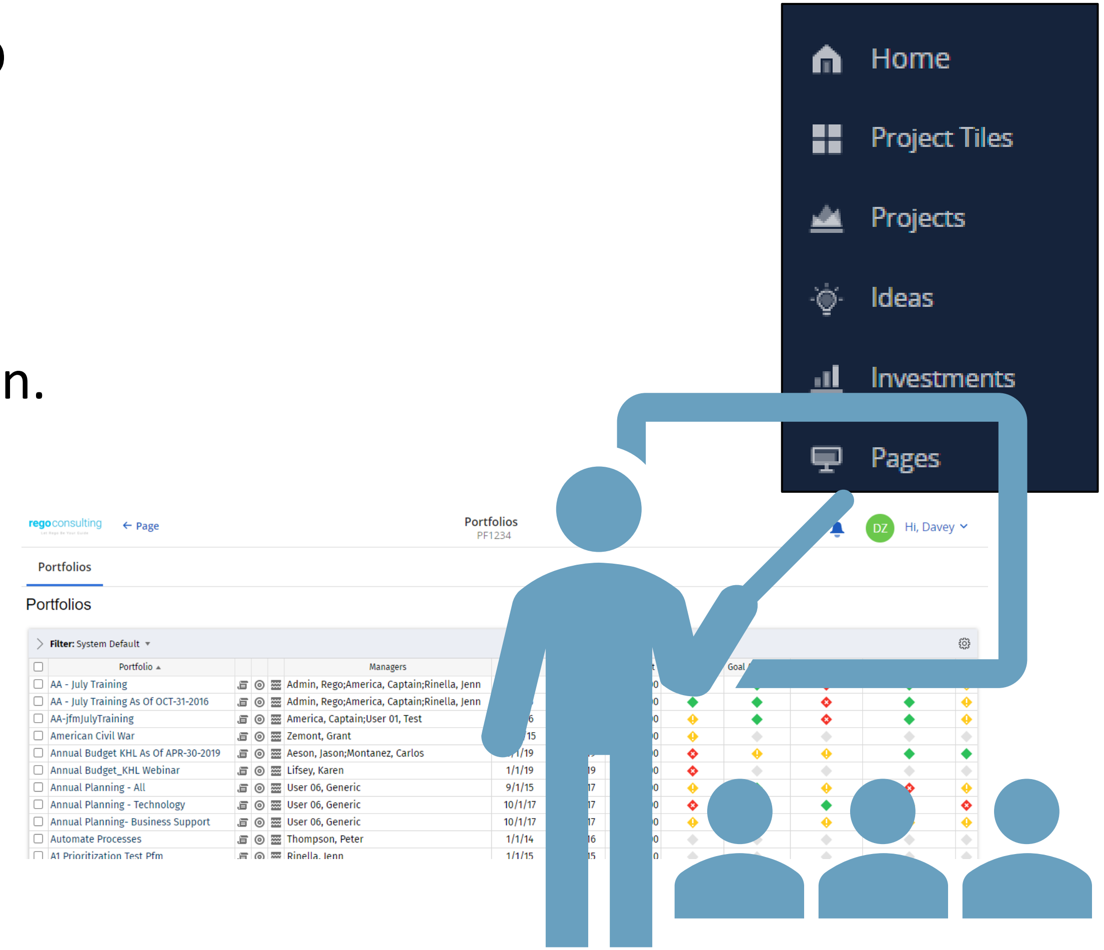


Pages

Dashboards via the Modern UX

Create a Page

- 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
  - 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

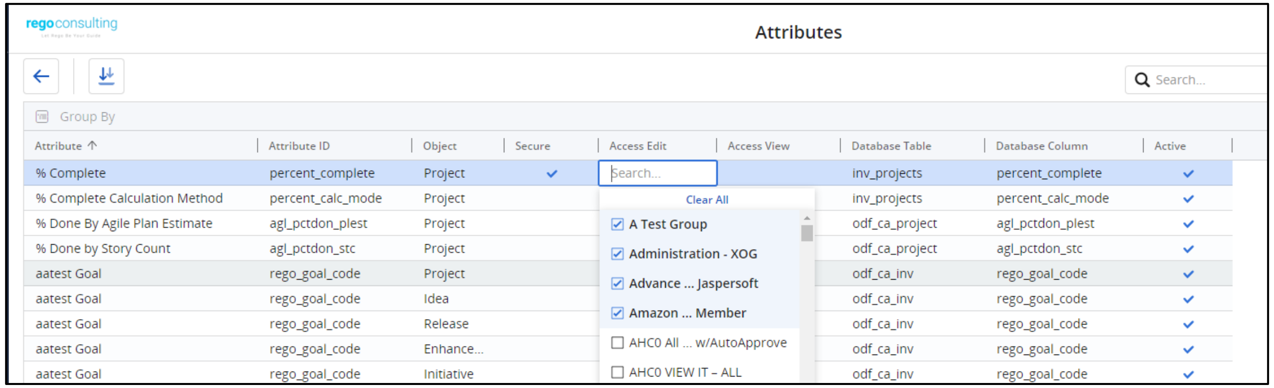


Attribute Security

Attribute 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

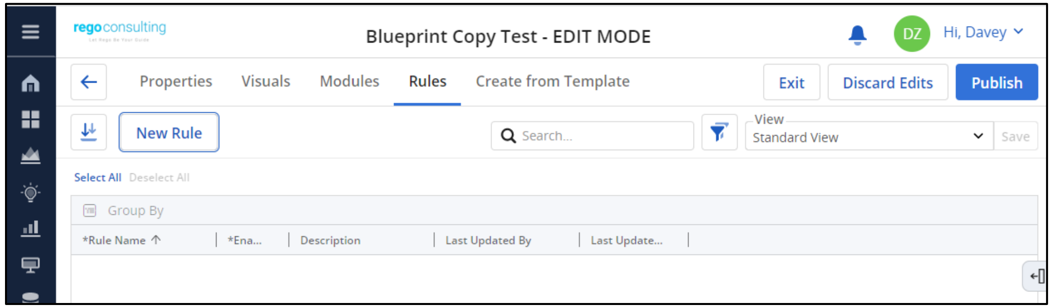
- Navigate to Modern Ux → Administration
- Select on the Attributes tile
- Search for attribute name
- Access Edits and Access View is required.

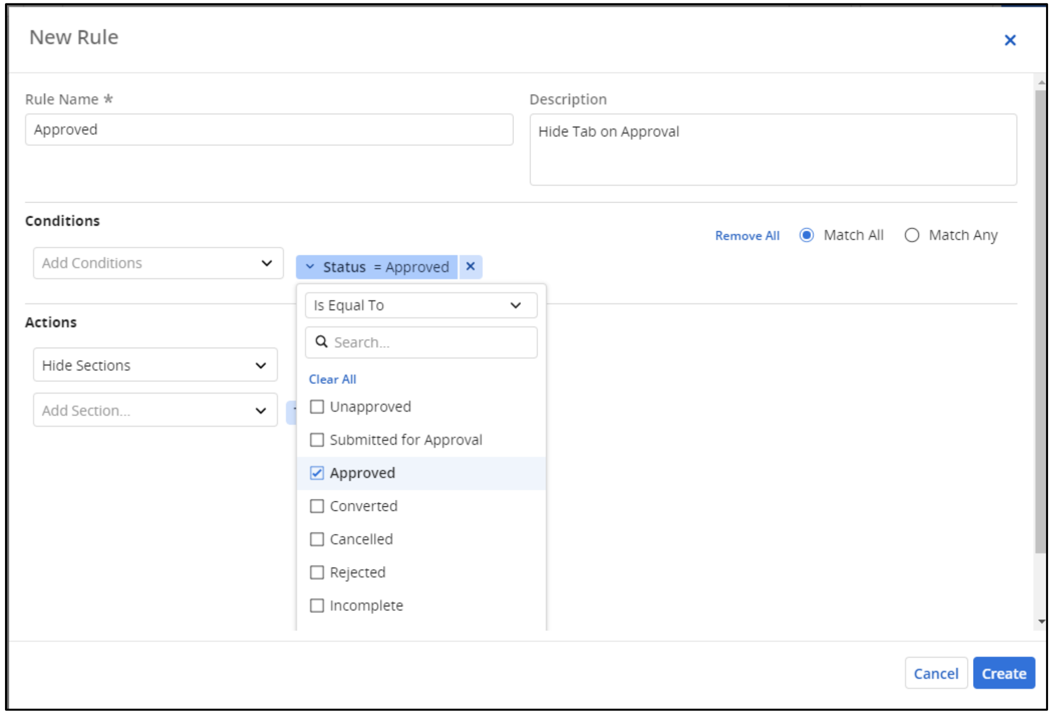


Rules Engine

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

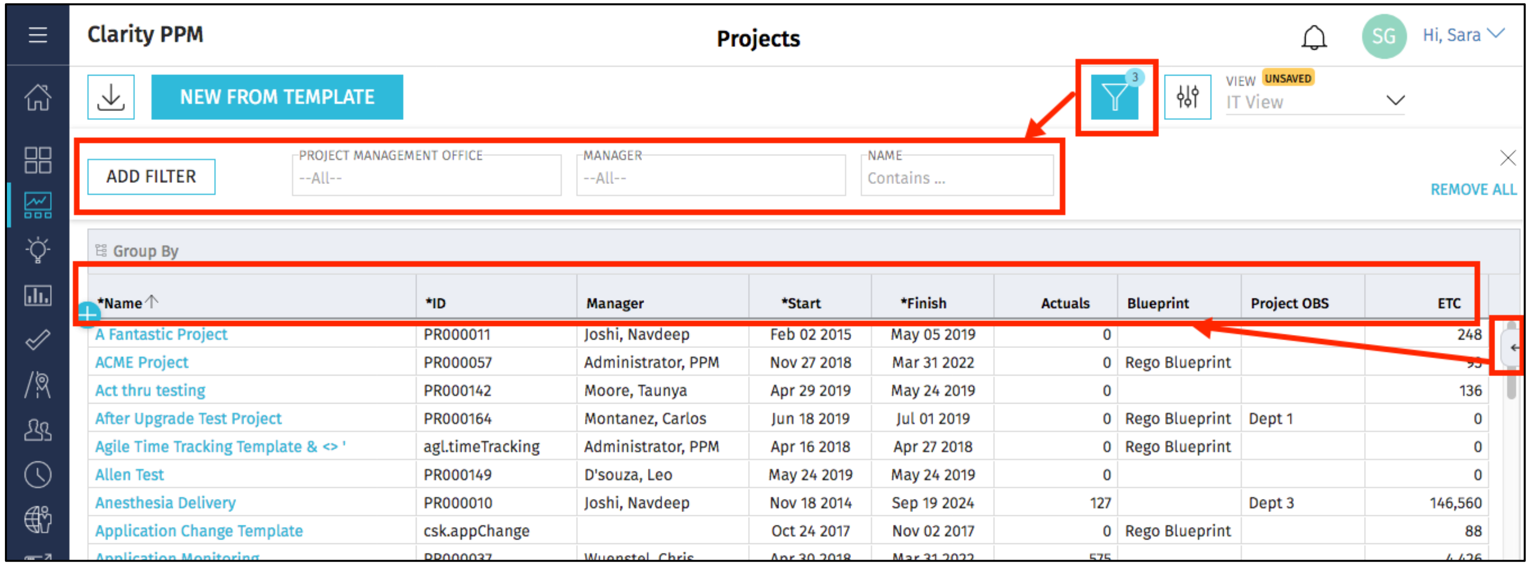




Saving Views and Filters

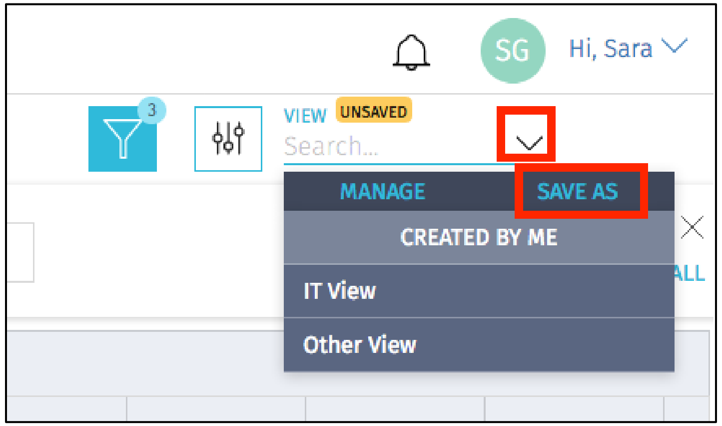
Saving Views and Filters (1)

- 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.

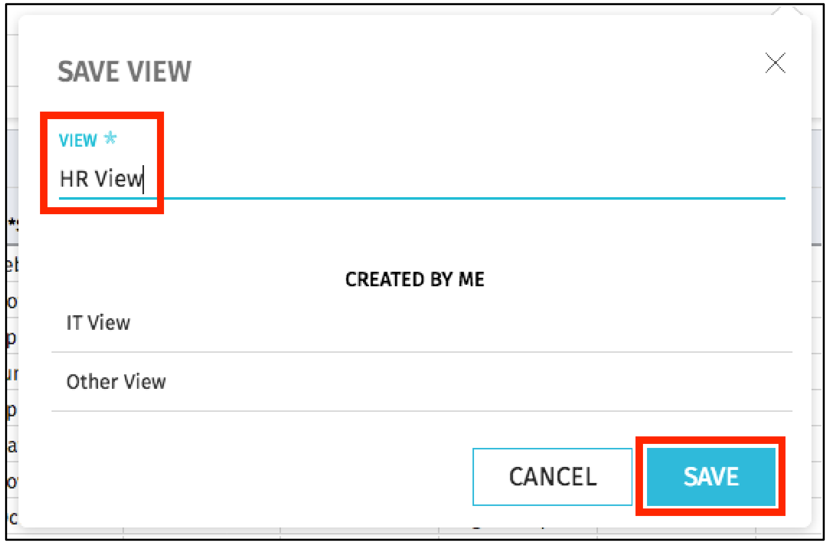


Saving Views and Filters (2)

- 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.

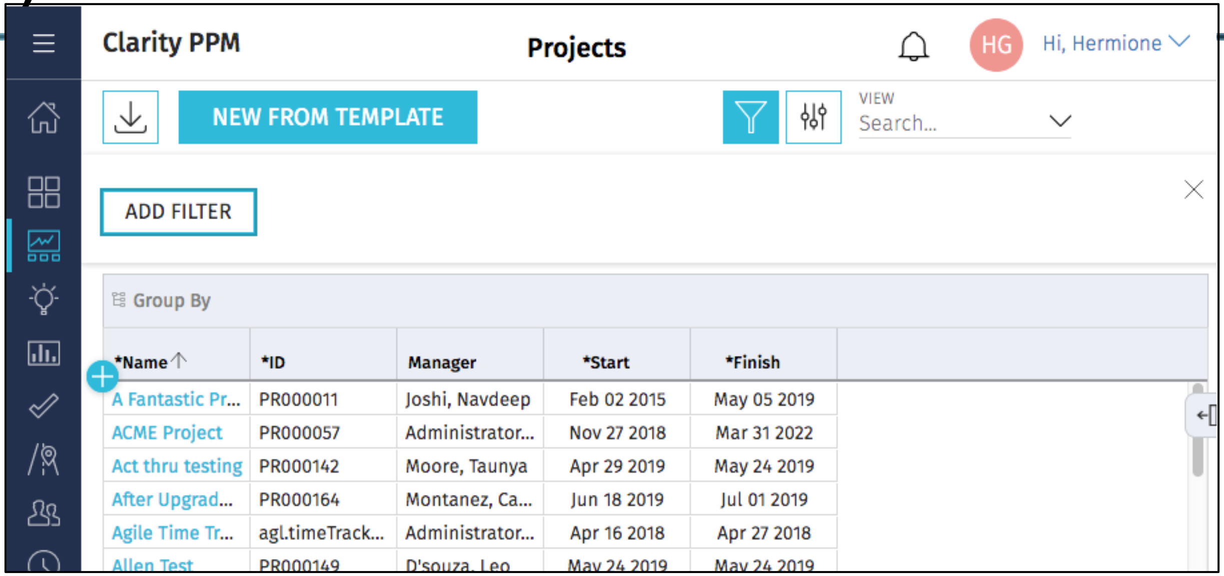


Enter a name for the View, and click **Save**



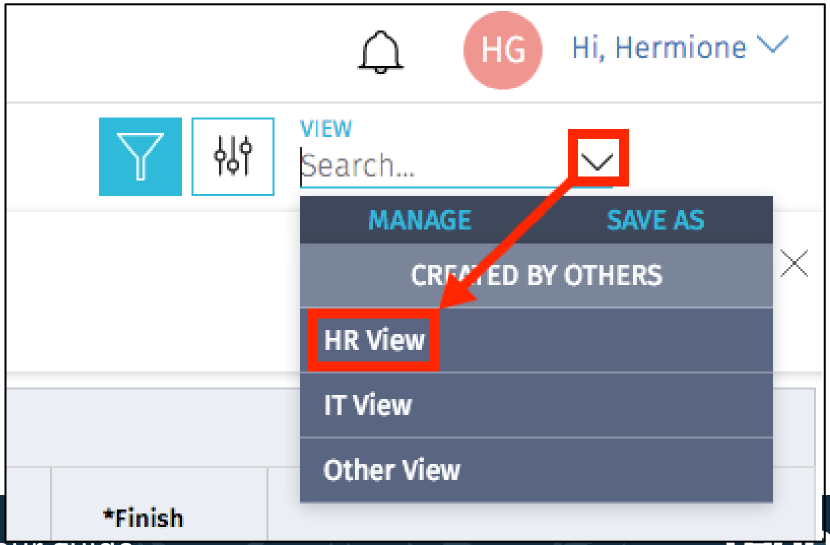
Saving Views and Filters (3)

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



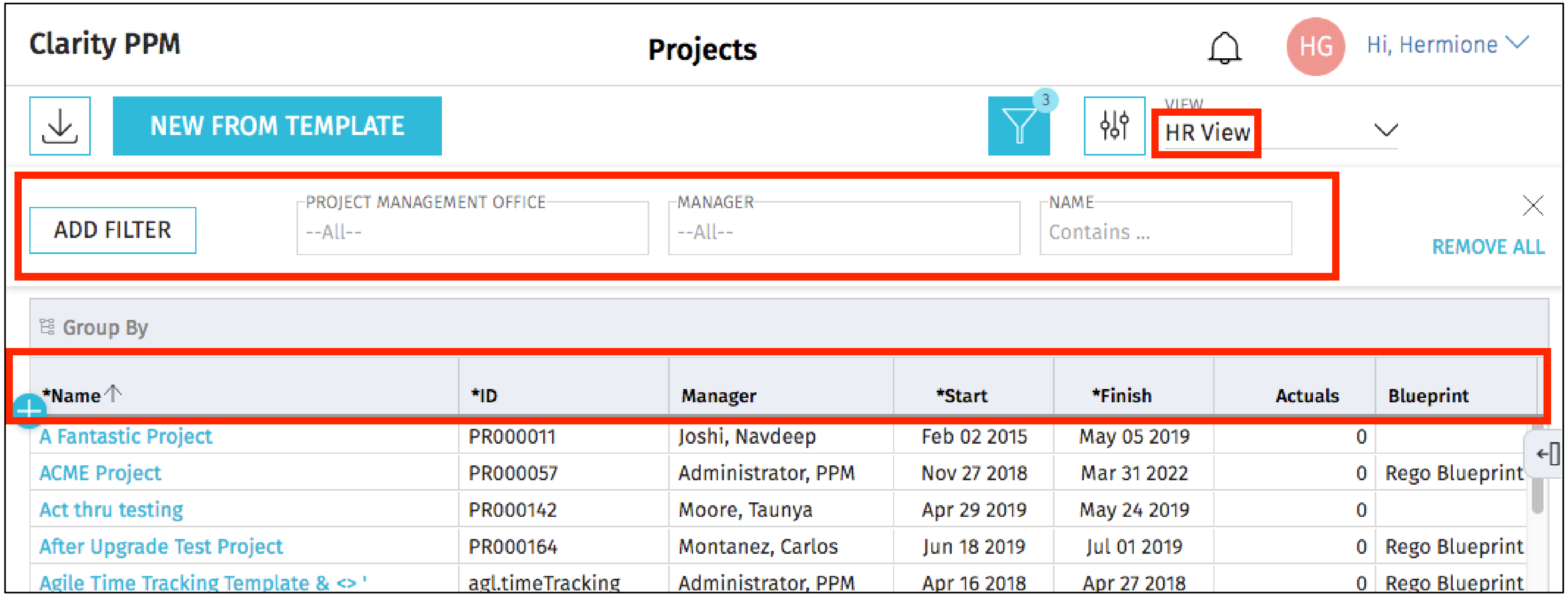
Original View, without desired fields and filters

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



Saving Views and Filters (4)

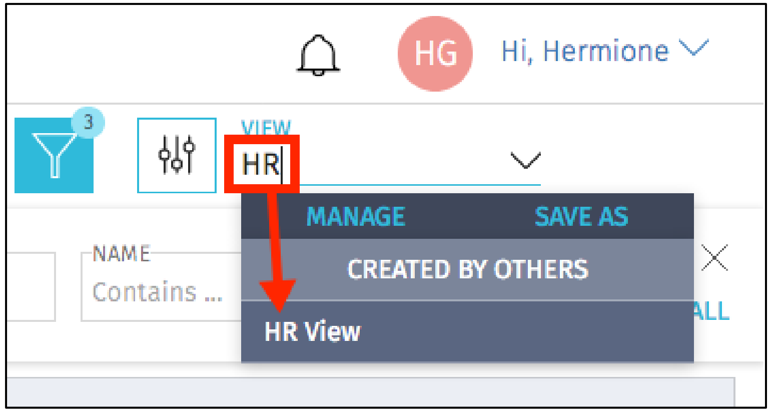
- The new view will now be applied.



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

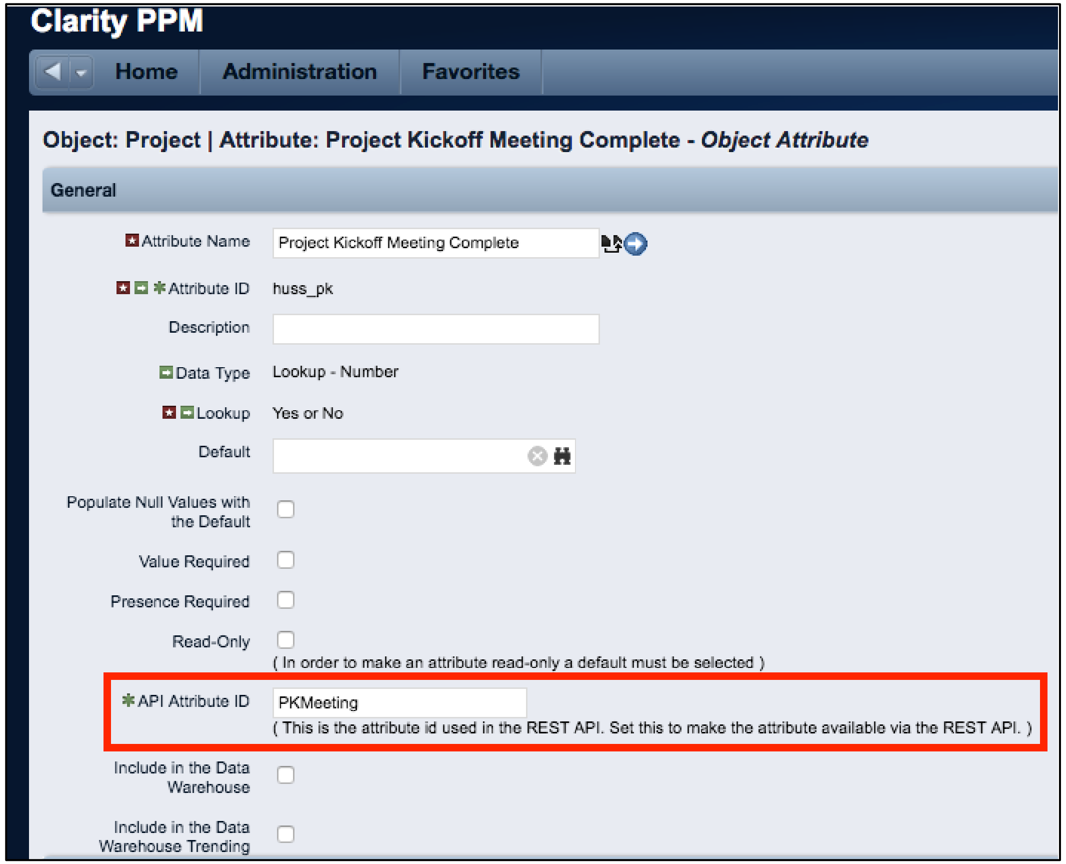


Part 4:
Enabling Attributes

API Enablement for attributes so they can be seen/used in Modern UX

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**.



<u>Note</u>: You must API-Enable OBS attributes for them to be utilized in filters, views, etc.

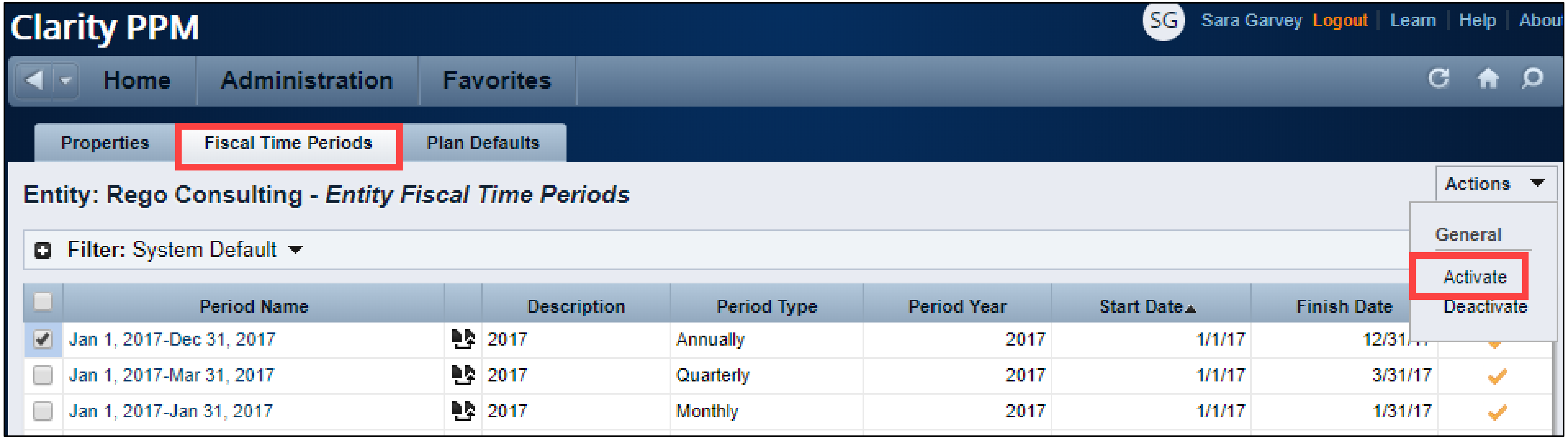
Fiscal Time Periods

Fiscal Time Periods

- While data in the Classic UX views is often presented in time-scaled views based on time slices, Modern UX views utilize the Fiscal Time periods. In order to view Staffing, Project (Task, Assignment, etc.) and Roadmap data in time-scaled formats, the appropriate fiscal periods must exist or be created.
- Often, companies create quarterly, yearly and monthly fiscal periods, but perhaps don't create weekly fiscal periods. If you'd like to view the Modern UX data in weekly periods, you must create these weekly fiscal periods.
- Additionally, in order to create Roadmaps or view and analyze data in the future, fiscal periods must exist for the desired timeframes. For example, If you want to create a Roadmap that looks out 5 years, your system must have 5 years of fiscal periods into the future.

Fiscal Time Periods

- Navigate to Administration → Finance → Setup and access your Entity.
- Click to the *Fiscal Periods* tab, and use the **New** button to create the weekly periods.
- Be sure to “Activate” the time period after creation.



Rename Fiscal Periods

- It is best practice to rename the periods with “friendly” names to enable the views to display more cleanly.

Security Rights

Modern UX Security Rights (1)

- Use the security rights to drive which links users can see in the Modern UX,

Right	Description	Notes	License Type
Custom Investment - Navigate	Allows user access to the custom investment page in the modern user experience. The user will only be able to view information for custom investments to which the user has access.	Give this right to users who need to view, create or edit Custom Investments. Will allow them to see the link in the Modern UX Nav menu. Rights to the individual Custom Investments must also then be granted (create, edit).	View Only
Idea Management - Navigate	Allows user access to the idea management pages in the new user experience. The user will only be able to view information for ideas to which the user has access.	Grants access to the Ideas link in the Modern UX Nav menu. User must also have Idea View and / or edit rights, and the Modern UX will respect those rights.	View Only
Project Management - Tiles Navigate	Allows user access to the project management Tiles page in the new user experience. The user will only be able to view information for projects to which the user has access.	Allows the user to see the Tiles version of the Project list in the Modern UX Nav Menu. User must also have Project View and / or edit rights, and the Modern UX will respect those rights.	View Only
Project Management - Navigate	Allows user access to the project management pages in the new user experience. The user will only be able to view information for projects to which the user has access.	Allows the user to see the Grid version of the Project list in the Modern UX Nav Menu. User must also have Project View and / or edit rights, and the Modern UX will respect those rights.	View Only
Staffing - Navigate	Allows user access to the resource staffing pages in the new user experience. The user will only be able to view staffing information for resources to which the user has access.	Rights to view the Staffing page in the new UX, which is used for Resource Management.	View Only
Resource Forecast Rate - Edit	Allows user to view resource forecast column in Staffing grids and edit forecast rate in flyout in the new user experience. Includes Resource Forecast Rate - View right.	Edit and View rights to the Forecast rate in the Modern UX, which is viewable ONLY in the Staffing page in the Modern UX.	Edit – Full View – View Only
Resource Forecast Rate - View	Allows user to view resource forecast column in Staffing grids and forecast rate in flyout in the new user experience.		

Modern UX Security Rights (2)

Right	Description	Notes	License Type
Roadmap - Navigate	Allows user access to the Roadmap pages in the new user experience. The user will only be able to view information for Roadmaps to which the user has access.	Allows the user to see the Roadmaps link in the Modern UX Nav menu.	View Only
Roadmap - Author - All	Allows the Roadmap Author to view, edit and delete the Roadmap and manage roadmap-specific picklists in the new user experience.	Gives the user view, edit and delete rights to roadmaps. Can be given globally, at the OBS level, or individually via instance rights or by naming an individual as in the Author field on the Roadmap.	Full
Roadmap - Create	Allows user to create Roadmaps in the new user experience. The creator of the Roadmap automatically becomes the Author and can edit or delete the Roadmap.	Allows users to create roadmaps.	Full
Roadmap - Delete - All	Allows user to view and delete all Roadmaps in the new user experience.	Allows for the deletion of roadmaps. Give this right sparingly.	Full
Roadmap - Edit - All	Allows user to view and edit all Roadmaps and manage roadmap-specific picklists in the new user experience.	Allows edit, but not delete which is what differentiates it from the Author right.	Full
Roadmap - View - All	Allows user to view all Roadmaps in the new user experience.	View rights for roadmaps in the Modern UX.	View Only
Tasks - Navigate	Allows user to access tasks page in the new user experience. The user will only be able to view the tasks to which the user is assigned.	Allows the user to see the Tasks link in the Modern UX Nav menu. This page can be used to manage individual tasks and assignments.	View Only
Team - Create	Allows user to create Teams in the new user experience. Includes Team - View - All global access right.	Rights associated with Staffing Teams, available only in the Modern UX.	Create – Full Delete - Full Edit – Full View – View Only
Team - Delete - All	Allows user to delete Teams in the new user experience. Includes Team - View - All global access right.		
Team - Edit - All	Allows user to edit Team names and its members in the new user experience. Includes Team - View - All global access right.		
Team - View - All	Allows user to view all the Teams in the new user experience.		
Classic PPM - Navigate	Allows user to access tasks page in the new user experience. The user will only be able to view the tasks to which the user is assigned.	Allow access to Classic PPM from new PPM UI.	View Only

Questions?

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Instructions for PMI credits

- Access your account at 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 Name = **regoUniversity**
- Course Number = **Session Number**
- 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.

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