



Creating Channels and Pages in the Modern UX

Your Guides:

Dave Lord and Luis Palacios

Introductions

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



Agenda

- Introduction
- Creating a Channel
- Passing Parameters in a Channel
- Introducing Pages (new in 15.9.2)
- Menu Links
- Considerations
- Questions?

Part I: Introduction



Let Rego be your guide.

What is a Channel

- Available in 15.5 and higher, Channels allow you to access external sites, applications or classic PPM.
- The user gets visibility to other tools or classic PPM without leaving a Clarity project, streamlining work and business decisions.
- Configurable via blueprints, giving users flexibility depending on the project type. Each blueprint will allow you to configure up to 5 channels.

Application Monitoring

FINANCE NO PA... TEST STATUS REPORT CLASSIC FINAN...

PROPERTIES TEAM TASKS **FINANCIAL PLANS** RISKS/ISSUES/CHANGES CHARGEBACKS PROCESSES HIER

Project: Application Monitoring - *Financial Plans - Cost Plans*

> Filter: System Default ▾

<input type="checkbox"/>	Plan Name	Set as Plan of Record	Plan of Record ▾	Period Type	Start Period	
<input type="checkbox"/>	Initial Budget		✓	Monthly	Jun 1, 2018-Jun 30, 2018	Feb
<input type="checkbox"/>	Cost Plan			Monthly	Jun 1, 2018-Jun 30, 2018	Feb

SAVE NEW MANUAL PLAN DELETE

Recent Channel Updates

- With 15.9.1 Channels can now be used in:
 - Ideas
 - Custom Investments
 - Custom Objects
- Other enhancements to Channels in 15.9.1:
 - Supports input parameters for custom attributes of type Number, String and Single Value Lookups (Static and NSQL Based)
 - Channel limit increased to 15
- 15.9.2 Updates:
 - Hierarchy Blueprints and Channels
 - Pages introduced

Sample: Channels Linking to Classic PPM with Phoenix UI Theme

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Clarity PPM

Application Monitoring
PR000037

NEEDS HELP

PA Hi, PPM

DETAILS

STAFF

TASKS

RISKS

ISSUES

CHANGES

FINANCIALS

STATUS

DOCUMENTS

LINKS

FINANCE NO PA...

TEST

PROPERTIES

TEAM

TASKS

FINANCIAL PLANS

RISKS/ISSUES/CHANGES

CHARGEBACKS

HIERARCHY

PROCESSES

DASHBOARD

ITD VISUAL TASK BOARD

Project: Application Monitoring - *Financial Plans - Cost Plans*

⚙️ Actions

> Filter: System Default

<input type="checkbox"/>	Plan Name	Set as Plan of Record	Plan of Record	Period Type	Start Period	Finish Period	Planned Cost	Benefit Plan
<input type="checkbox"/>	Initial Budget		✓	Monthly	Jun 1, 2018-Jun 30, 2018	Feb 1, 2019-Feb 28, 2019	385,840.00	
<input type="checkbox"/>	Cost Plan			Monthly	Jun 1, 2018-Jun 30, 2018	Feb 1, 2019-Feb 28, 2019	385,840.00	

Displaying 1 - 2 of 2

SAVE

NEW MANUAL PLAN

✓ DELETE

Highlighted rows = Plan of Record Currency = USD

Other Options

- Pages were introduced in 15.9.2 and provide the ability to build dashboard-like blueprints as a top-level menu option.
- Menu Links for quick links, commonly used links and/or shortcuts

Part 2: Channels

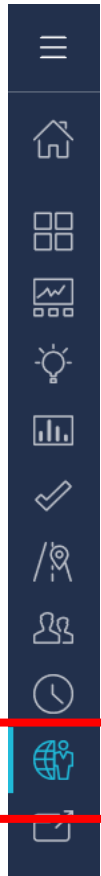


Let Rego be your guide.






Creating a Channel

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1. Go into the New UI



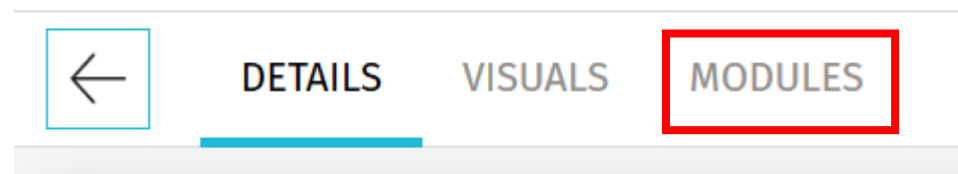
2. Select Administration

>> BLUEPRINT		TYPE
> 	IT Blueprint	Project
> 	Name of the Client	Project
	New UX Idea	New UX Idea DEFAULT STANDARD
	Patrick Custom Investment	Custom Investment DEFAULT STANDARD
> 	Rego Blueprint	Project DEFAULT

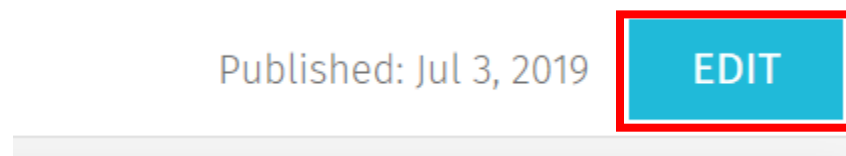
3. Select Desired Blueprint

Creating a Channel cont.

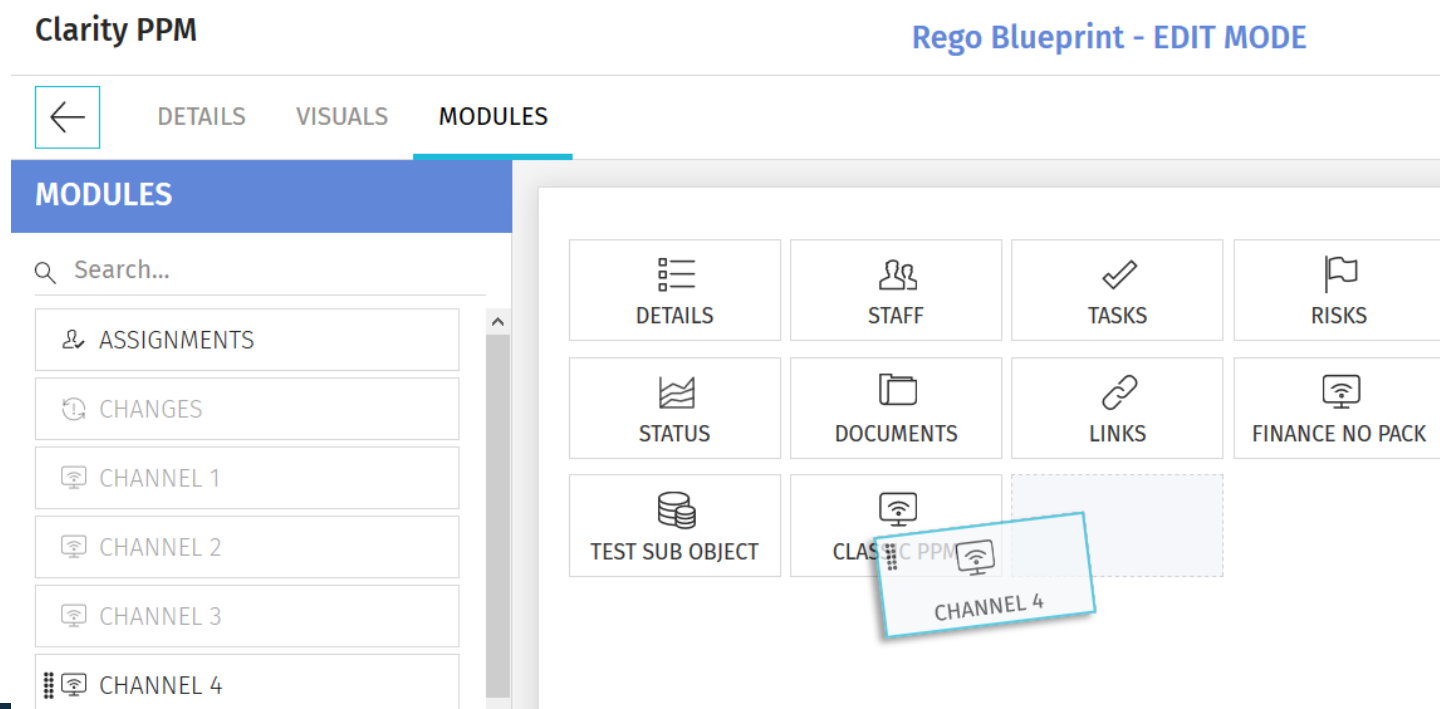
4. Select Modules



5. Select Edit in the Upper Right Corner



6. Drag Channel to Page



Creating a Channel cont.

7. Put desired name and link into Channel. Some external sites might require a “Referrer URL” otherwise they might block the site from being visible.

Configure - First Channel

CHANNEL NAME *

First Channel

CHANNEL URL *

<https://cappm.ondemand.ca.com/niku/nu#action:npt.overview>

REFERRER URLS

Comma Separated

PREVIEW

8. Select Publish in the upper right

EXIT DISCARD EDITS PUBLISH

Creating a Channel cont.

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Example Result

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PA Hi, PPM

HOME DOCUMENTS LINKS FINANCE NO PA... STATUS REPORT CLASSIC FINAN... DASHBOARD TEST SUB OBJECT CLASSIC PPM FIRST CHANNEL

Classic Clarity PPM

GENERAL MY ISSUES/RISKS MY TIME MY WORK XOG POWERBI CHANNEL PORTLET TEST XOG CLIENT TESTING PORTLETS

Overview: General

Action Items

View: Action Items Assigned to Me

There are no action items to display.

NEW

My Projects

Project	Stage	Status	Team	Gantt	Documents
Anesthesia Delivery					
mnp-empty1					

My Missing Time

There are no items to display

Missing Time by Project Manager

Resource Name	Stoplight	Status	Period Start	Resource Manager	Actual Hours	Actual Days
Bolin, Rod	✖	Not Created	3/4/19	Joshi, Navdeep	0	0
Bolin, Rod	✖	Not Created	3/11/19	Joshi, Navdeep	0	0
Bolin, Rod	✖	Not Created	3/18/19	Joshi, Navdeep	0	0

Dynamic Parameters in Channel URL

- Channels allow several parameters to be passed on to the URL, which extends the functionality.
- For example:
 - Rendering a Classic PPM Properties Page
 - External sites expecting a parameter, like a Power BI filtered report or similar.
- Parameters
 - Project Code: \${code}
 - INV_INVESTMENTS.CODE (PRJ0001)
 - Project ID: \${internalID}
 - INV_INVESTMENTS.ID (5000001)
 - Project Manager: \${manager}
 - SRM_RESOURCES.UNIQUE_NAME (jsmith)
 - User Name: \${userName}
 - SRM_RESOURCES.UNIQUE_NAME (jsmith) (User Logged In)
 - Project Name: \${name}
 - INV_INVESTMENTS.NAME (Application%20Monitoring)
 - Custom Fields (Number, String and Single Value Lookups (Static and NSQL))

Creating Channel to Project Tab

1) Go into any project in Classic PPM and copy url of desired page

https://cappm.com/niku/nu#action:revmgr.costplanList.project&id=5009025&ui.page.space=mainnav.work&object_code=project

2) Replace highlighted Internal ID with \${internalID}

[https://cappm.com/niku/nu#action:revmgr.costplanList.project&id=\\${internalID}&ui.page.space=mainnav.work&object_code=project](https://cappm.com/niku/nu#action:revmgr.costplanList.project&id=${internalID}&ui.page.space=mainnav.work&object_code=project)
&puiFullscreen=on

3) If using Phoenix UI add &puiFullscreen=on at the end of url to remove menu inside channel.

4) Paste into channel URL and go into any project in the New UI and view result.
Example on next page.

Creating Channel to Project Tab Result

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Clarity PPM

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DOCUMENTS

LINKS

FINANCE NO PA...

STATUS REPORT

CLASSIC FINAN...

DASHBOARD

TEST SUB OBJECT

CLASSIC PPM

FIRST CHANNEL

PROPERTIES

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ITD VISUAL TASK BOARD

Project: Application Monitoring - Financial Plans - Cost Plans

🔑 Actions

> Filter: System Default

⚙️

<input type="checkbox"/>	Plan Name	Set as Plan of Record	Plan of Record	Period Type	Start Period	Finish Period	Planned Cost	Benefit Plan
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Displaying 1 - 2 of 2

SAVE

NEW MANUAL PLAN

✓ DELETE

Highlighted rows = Plan of Record Currency = USD

Part 3:

Introduction to Pages


(new in 15.9.2)



Let Rego be your guide.

Introduction to Pages

Pages provide a new, more robust option for linking to Clarity screens as well as external applications.

- Contain channels but no longer need to be tied to any object instance
- Supports custom attributes for passing parameters
- Includes a new studio object called “Page” (completely separate from Portlet Pages which still exist)
- Standard security rights are included for this new “Page” object so Pages can be editable, view-only or completely hidden based on need
- Pages are only available in the modern UX via a new icon 
- “Page – Navigate” security right needs to be granted
- Pages are associated with a Blueprint where Modules/Channels are defined (15 max)

Create Blueprint for Page Layout #1

Find the “Standard Page” Blueprint under Administration -> Blueprints:

The screenshot shows the Clarity interface with a sidebar on the left containing navigation icons. The main header includes the 'clarity' logo, a notification bell, and a user profile 'DL Hi, David'. Below the header is a search bar with 'Page' entered. A table lists blueprints with columns: BLUEPRINT, TYPE, LAST USED, USING, MODIFIED BY, MODIFIED, and PUBLISHED. The first row shows 'Standard Page' with 'Page' as the type, 'Jul 18, 2021' as the last used date, '0' as the number of users, 'PPM Admi...' as the modifier, and 'May 3, 2021' as the published date. The 'Page' type is circled in red.

BLUEPRINT	TYPE	LAST USED	USING	MODIFIED BY	MODIFIED	PUBLISHED
Standard Page	Page Standard	Jul 18, 2021	0	PPM Admi...	May 3, 2021	May 3, 2021

Click on the 3 dots on the right-hand side and select COPY:


This screenshot is similar to the previous one, but the 'COPY' option is highlighted in the dropdown menu that appears when clicking the three dots on the right side of the 'Standard Page' row. The 'COPY' option is circled in red.

BLUEPRINT	TYPE	LAST USED	USING	MODIFIED BY	MODIFIED	PUBLISHED
Standard Page	Page Standard	Jul 18, 2021	0	PPM Admi...	May 3, 2021	COPY

Create Blueprint for Page Layout #2

Rename the new Blueprint:

The screenshot shows the Clarity interface with a sidebar on the left containing navigation icons. The main content area has a search bar at the top with the text 'TYPE Page' and a search filter. Below the search bar is a table with the following columns: BLUEPRINT, TYPE, LAST USED, USING, MODIFIED BY, MODIFIED, and PUBLISHED. The table contains two rows. The first row is for '(Copy of) Standard Page' and the second row is for 'Standard Page'. The 'Rename' button is circled in red in the first row.

BLUEPRINT	TYPE	LAST USED	USING	MODIFIED BY	MODIFIED	PUBLISHED
(Copy of) Standard Page	 Rename	Jul 18, 2021	0	David Lord	Jul 18, 2021	Jul 18, 2021
Standard Page	Page Standard	Jul 18, 2021	0	PPM Admi...	May 3, 2021	May 3, 2021

The screenshot shows the Clarity interface with the same sidebar and search bar. The table now contains only one row for 'Dave Test Page'.

BLUEPRINT	TYPE	LAST USED	USING	MODIFIED BY	MODIFIED	PUBLISHED
Dave Test Page	Page	Jul 18, 2021	0	David Lord	Jul 18, 2021	Jul 18, 2021

Create Blueprint for Page Layout #3

Move to the Modules tab and click “Edit”



Click “New Channel”



Create Blueprint for Page Layout #4

Name your Channel and paste in the URL

CHANNEL NAME *

CHANNEL URL *

Referrer URLs

Comma Separated

Drag the new Channel onto the Page, click “Publish”

clarity Dave Test Page - EDIT MODE

Properties Modules

MODULES

Search...

New Channel

ACTION ITEMS

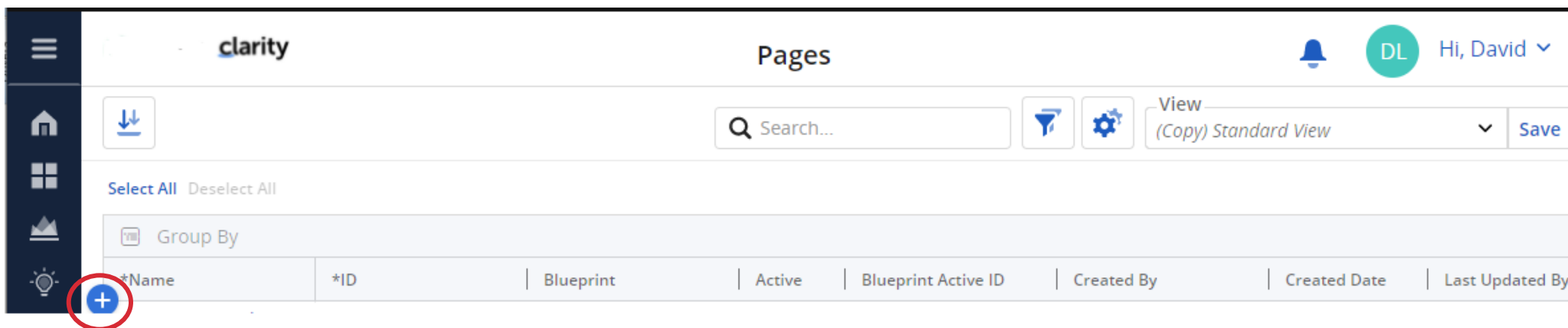
ACTION ITEMS

Exit Discard Edits Publish

Note: after you add a channel, the PROPERTIES channel can be removed by hovering over the card and hitting “X”

Create Page

Navigate to Pages  and click on the blue “+”

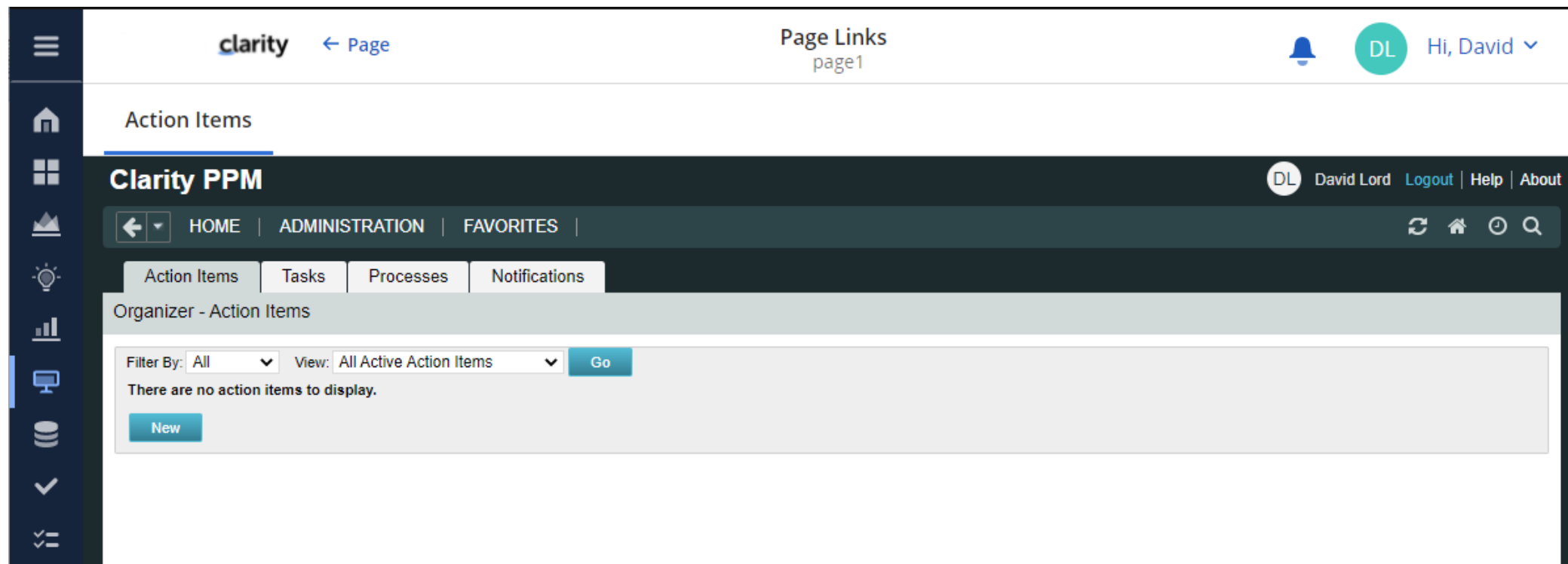


Give it a Name, ID and select the Blueprint you just created

<input type="checkbox"/> Page Links	page1	Dave Test Page	✓	Dave Test Page	Lord, David
-------------------------------------	-------	----------------	---	----------------	-------------

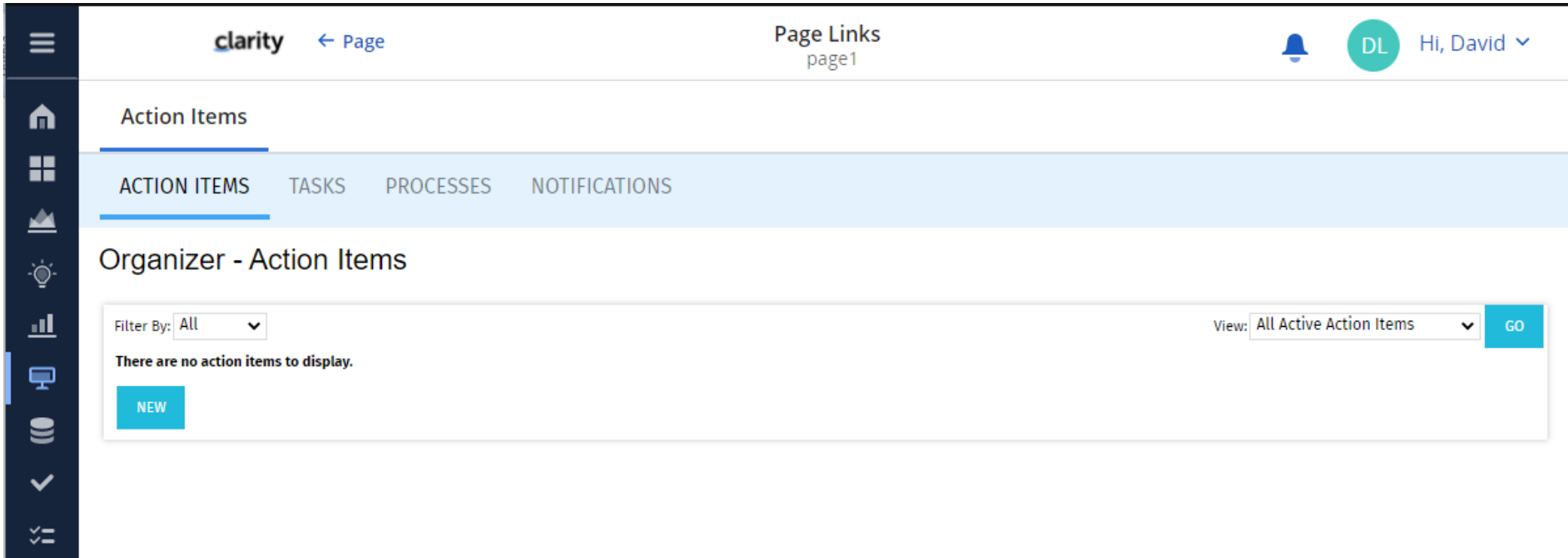
View Page – Classic UI

Click on your new Page to see the results!



View Page – Modern UX

After changing to the default UI to Phoenix and refreshing the page



Using Parameters in Page Channels

The Page object can be customized like any other Studio object. This allows you to create attributes to be used as input parameters in channel definitions.

Objects

OBJECT NAME

page

DESCRIPTION

OBJECT ID

MASTER OBJECT

DATA WAREHOUSE

All

ABSTRACT OBJECT

All

DATA WAREHOUSE TRENDING

All

FILTER

SHOW ALL

CLEAR

<input type="checkbox"/>	Object	ID	Description	Master Object	Partition Model	Event Enabled	Data Warehouse	Data Warehouse Trending	API Attribute ID
	Page	ui_page	The Page object for the new user experience						uiPages

Using Parameters in Page Channels #2

Here a string attribute called “Process Name” has been defined:

Object: Page - Attributes

ATTRIBUTE NAME

ACTIVE
Active

ATTRIBUTE DISPLAY
All Attributes

<input type="checkbox"/>	Attribute	Description	Active	Virtual	Data Type	Default	Database Table	Database Column
<input type="checkbox"/>	Active	Is this page active or not	✓		Boolean	<input checked="" type="checkbox"/>	CMN_UI_PAGE	is_active
<input type="checkbox"/>	Blueprint	Blueprint associated to the page	✓		Lookup - Number		CMN_UI_PAGE	ODF_BLUEPRINT_ID
<input type="checkbox"/>	Created By		✓	✓	String		CREATED	
<input type="checkbox"/>	Created Date		✓	✓	Date		CMN_UI_PAGE	
<input type="checkbox"/>	ID		✓		String		CMN_UI_PAGE	CODE
<input type="checkbox"/>	Last Updated By		✓	✓	String		UPDATED	
<input type="checkbox"/>	Last Updated Date		✓	✓	Date		CMN_UI_PAGE	
<input type="checkbox"/>	Name		✓		String		CMN_UI_PAGE	NAME
<input type="checkbox"/>	Partition	Code that identifies the partition	✓		Lookup - String		odf_ca_ui_page	partition_code
<input type="checkbox"/>	Process Name		✓		String		odf_ca_ui_page	z_proc_name
<input type="checkbox"/>	System	A seeded page is considered as system page that can not be modified or deleted by the user.	✓		Boolean	<input type="checkbox"/>	CMN_UI_PAGE	is_system

ATTRIBUTE NAME
Process Name

ATTRIBUTE ID
z_proc_name

DESCRIPTION

DATA TYPE
String

DEFAULT VALUE

MAXIMUM SIZE
20
(The maximum size is 2000. For 3 byte Unicode the actual maximum size is 1333.)

POPULATE NULL VALUES WITH THE DEFAULT
☐

VALUE REQUIRED
☐

PRESENCE REQUIRED
☐

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

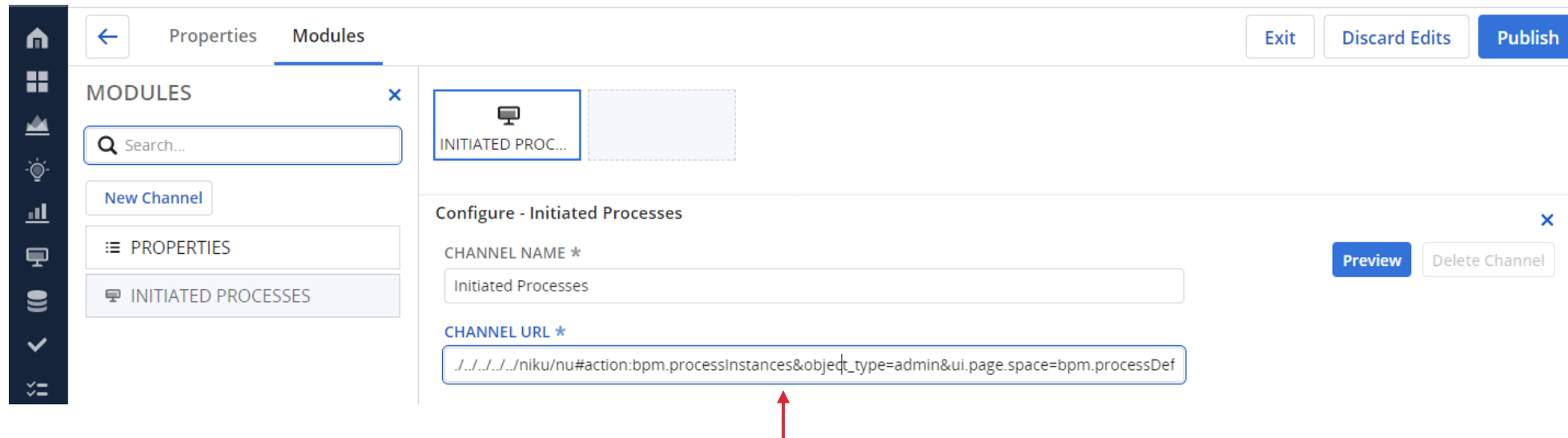
API ATTRIBUTE ID
u_proc_name
(This is the attribute id used in the REST API. Set this to make the attribute available)

API Attribute ID is required and is used as the parameter name

Using Parameters in Page Channels #3

In this example a Module named Initiated Processes has been added to a Page Blueprint with the following Channel URL syntax:

```
./../.././../../niku/nu#action:bpm.processInstances&object_type=admin&ui.page.space=bpm.processDefinitions&ui.page.template=union.adminPage&filtered=true&process_name=${u_proc_name}&puiFullscreen=on
```



Using Parameters in Page Channels #4

Pull up the Page associated with this Blueprint and enter some value in the parameter “Process Name”

clarity ← Page Processes pag001

Properties Initiated Proc...

SUMMARY

Name *

Processes

ID *

pag001

Process Name

blue

clarity ← Page Processes pag001

Properties Initiated Proc...

AVAILABLE INITIATED ESCALATIONS

Initiated Processes

PROCESS NAME

blue

FROM START DATE

TO START DATE

PRIMARY OBJECT

STATUS

All

INITIATED BY

FILTER SHOW ALL CLEAR

Process	ID	Primary Object	Object Name	Progress	Steps In Progress	Status	Messages	Initiated By	Start Date	Finish Date
Blueprint Migrator	rego_blueprint_migrator			██████████		◆	📄	Clarity Administrator	8/3/21 12:09 AM	8/3/21 12:09 AM
Blueprint Migrator	rego_blueprint_migrator			██████████		◆	📄	Clarity Administrator	8/2/21 11:52 PM	8/2/21 11:52 PM
Blueprint Migrator	rego_blueprint_migrator			██████████		◆	📄	Clarity Administrator	8/3/21 12:02 AM	8/3/21 12:02 AM
Blueprint Migrator	rego_blueprint_migrator			██████████		◆	📄	Clarity Administrator	8/3/21 12:12 AM	8/3/21 12:12 AM

Displaying 1 - 4 of 4

Part 4: Menu Links



Let Rego be your guide.

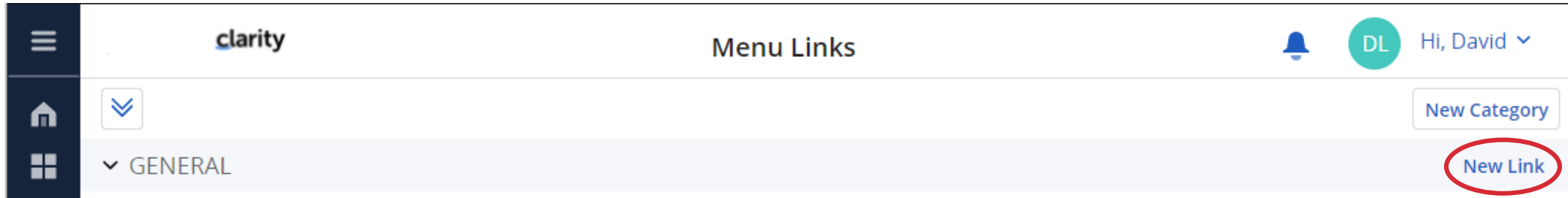
So What Are Menu Links?

Menu Links are similar to Page Channels but more limited:

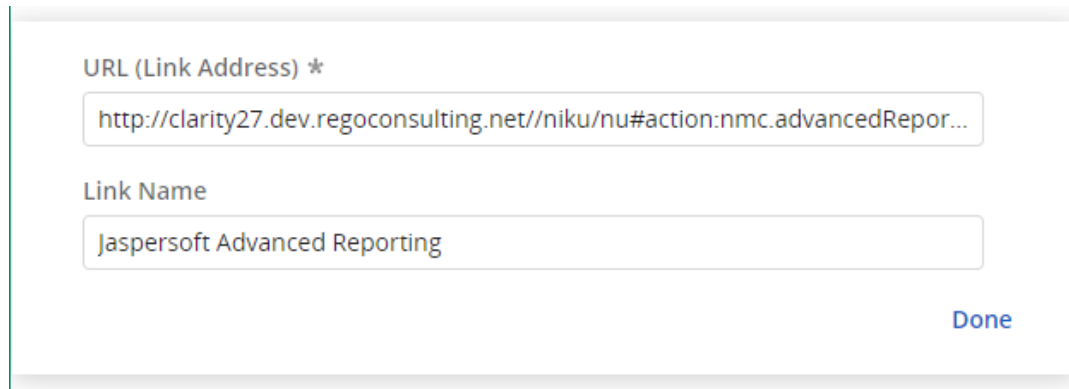
- Provide access to Clarity screens or other applications via a URL
- No blueprint support, only one “configurable” Menu Links page
- Supports grouping of links into Sections
- Security rights provided only at the Menu Links page level (all or nothing)
- Opens a new tab without modern UX “wrapper”

Create Menu Link

Navigate to Menu Links  and click “New Link”

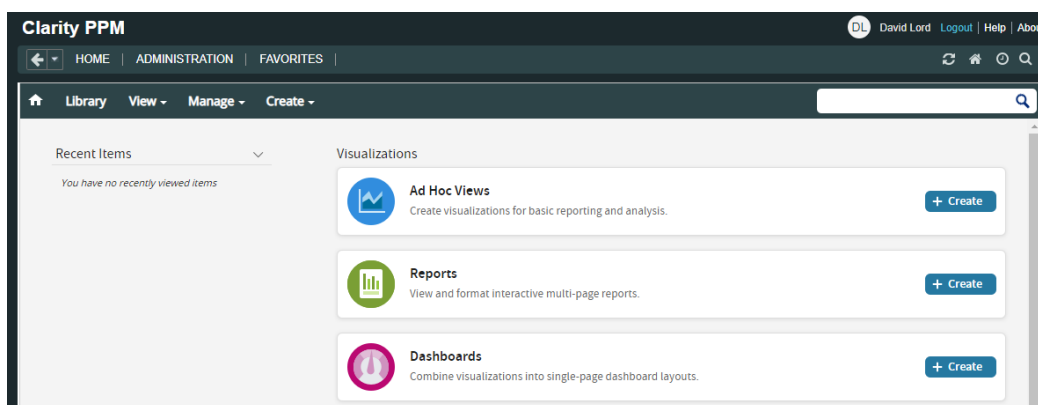
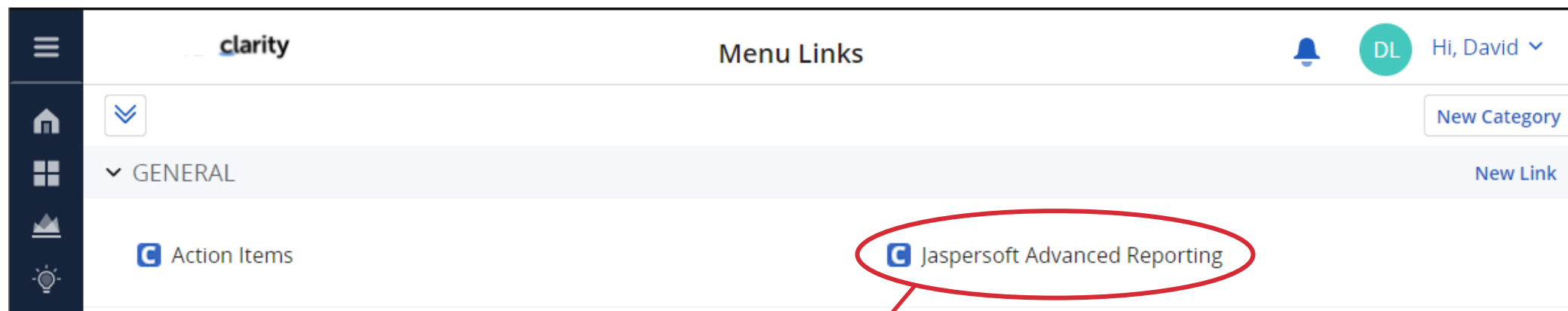


Enter the URL and a name for the Link, click “Done”



View Menu Link

Click on a Link:



Part 5: Considerations



Let Rego be your guide.

Considerations

- Some external sites might not allow rendering inside of the new UX, this can either be:
 - Security limitations between sites that don't allow cross site rendering
 - Require a Referrer URLs to validate it is being called by an authorized or expected application
- Channels show duplicate menu unless you are using Phoenix UI
 - Rego has a Solution for this if you don't use the Phoenix UI. Talk to Josh Leone if you want to know more about Rego's Channel Pack
- To avoid hardcoding URLs when referencing the Classic UI the following notation can be used:

`../../../../../nu#action:`



Configure - Classic Views

CHANNEL NAME
Classic Views

CHANNEL URL
../../../../../niku/nu#action:projmgr.projectProperties&odf_view=projectSchedule&id=\$...

REFERRER URLS

Considerations

	Channels	Pages	Menu Links
When to use	Embedding content inside the context of the object or hierarchy being displayed	High level dashboards. Multiple blueprints and instances using them can be created for multiple audiences	Quick links and shortcuts unrelated to PPM, which are opened in a new tab or window.
Limitations	Not all applications can be rendered inside a Channel	Not all applications can be rendered inside a Channel	

Sample: Rego Channel Pack

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🏠

📁 DOCUMENTS

🔗 LINKS

💰 FINANCE NO PA...

📊 STATUS REPORT

📄 CLASSIC FINAN...

📈 DASHBOARD

📁 TEST SUB OBJECT

📄 CLASSIC PPM

📄 FIRST CHANNEL

Properties

Team

Tasks

Financial Plans

Risks/Issues/Changes

Chargebacks

Hierarchy

Processes

Dashboard

itd Visual Task Board

Project: Application Monitoring - *Financial Plans - Cost Plans*

Filter: System Default

⚙️

<input type="checkbox"/>	Plan Name	Set as Plan of Record	Plan of Record	Period Type	Start Period	Finish Period	Planned Cost	Benefit Plan
<input type="checkbox"/>	Initial Budget		✓	Monthly	Jun 1, 2018-Jun 30, 2018	Feb 1, 2019-Feb 28, 2019	385,840.00	
<input type="checkbox"/>	Cost Plan			Monthly	Jun 1, 2018-Jun 30, 2018	Feb 1, 2019-Feb 28, 2019	385,840.00	

Displaying 1 - 2 of 2

Save

New Manual Plan

Delete

Highlighted rows = Plan of Record

Currency = USD

Questions?



Let Rego be your guide.

Thank You For Attending regoUniversity

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.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com