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Creating Channels and Pages in the Modern UX

Your Guides:

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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

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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.

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

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
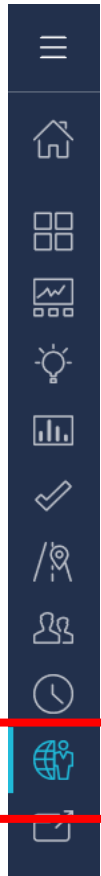
Part 2:
Channels

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Creating a Channel

1. Go into the New UI
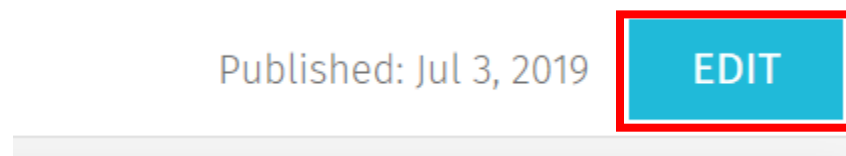

2. Select Administration

3. Select Desired Blueprint
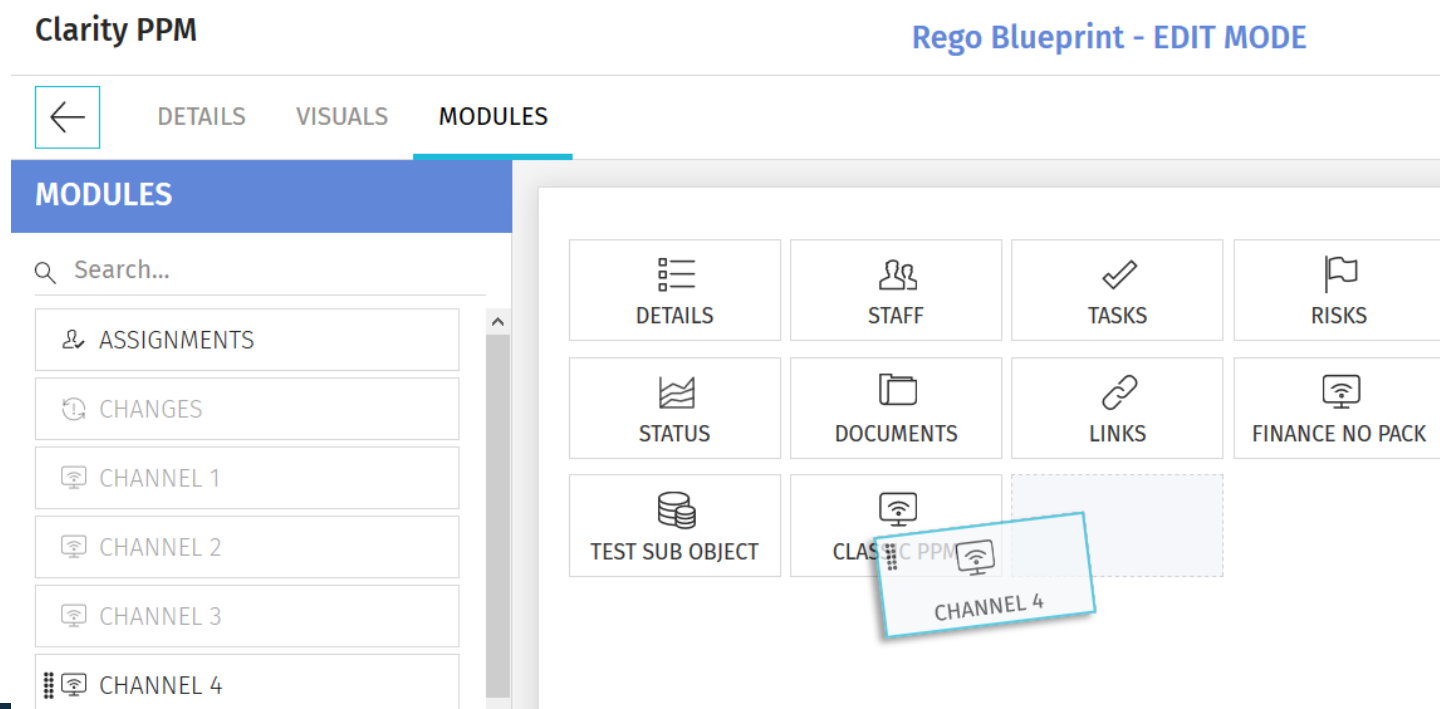
Creating a Channel cont.

4. Select Modules
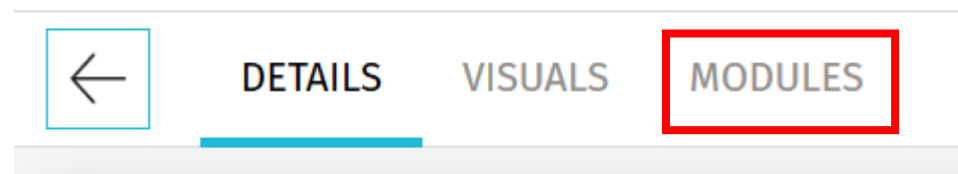
5. Select Edit in the Upper Right Corner

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.

8. Select Publish in the upper right

Creating a Channel cont.

Example Result

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
&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

Part 3:
Introduction to Pages

(new in 15.9.2)

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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:

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

Create Blueprint for Page Layout #2

Rename the new Blueprint:

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 *

Action Items

CHANNEL URL *

https://cppm10058-dev.clarityppm.saas.broadcom.com/niku/nu#action:calendar.organizerHome
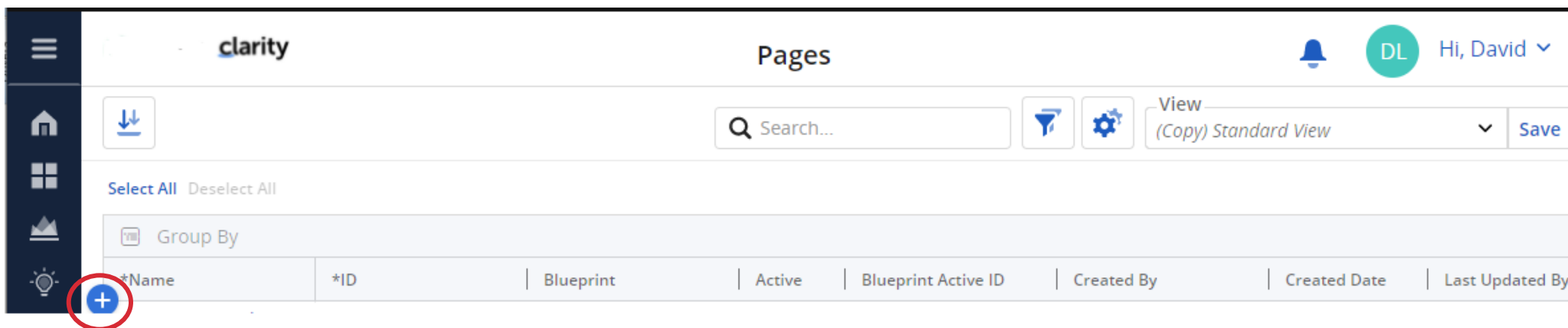
Referrer URLs

Comma Separated

Drag the new Channel onto the Page, click "Publish"

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

Create Page
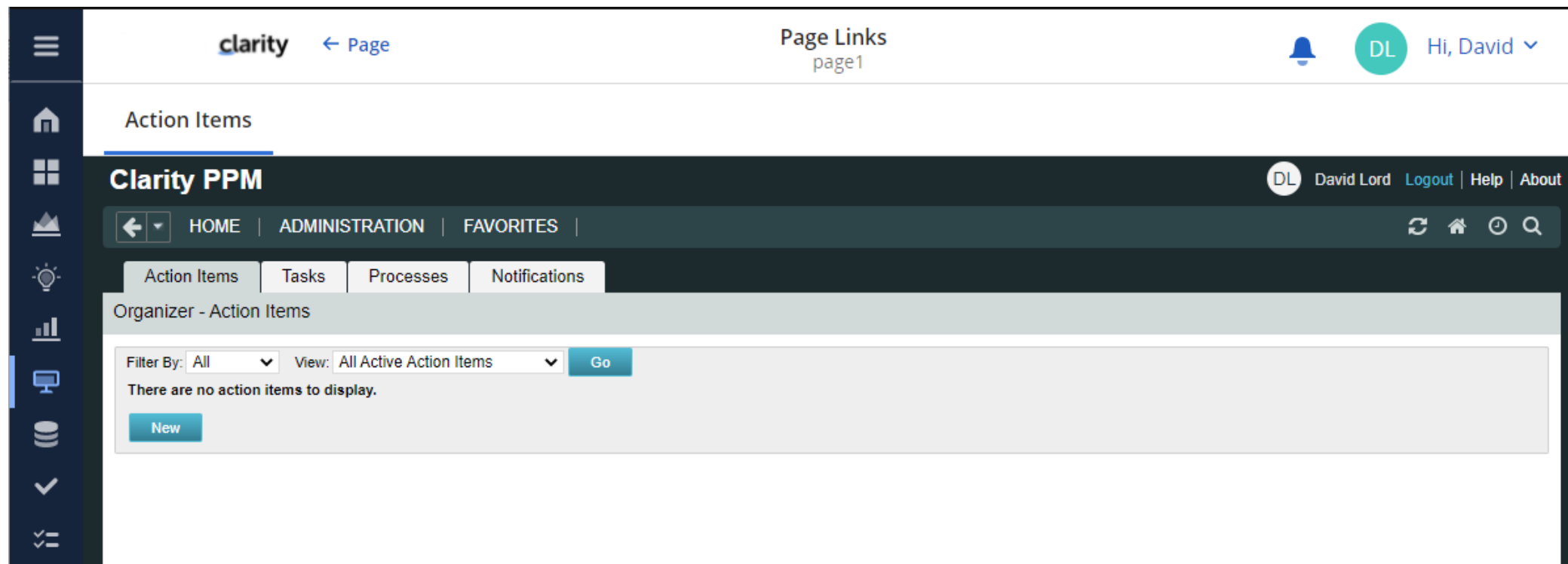
Navigate to Pages 🖥 and click on the blue "+"

Give it a Name, ID and select the Blueprint you just created
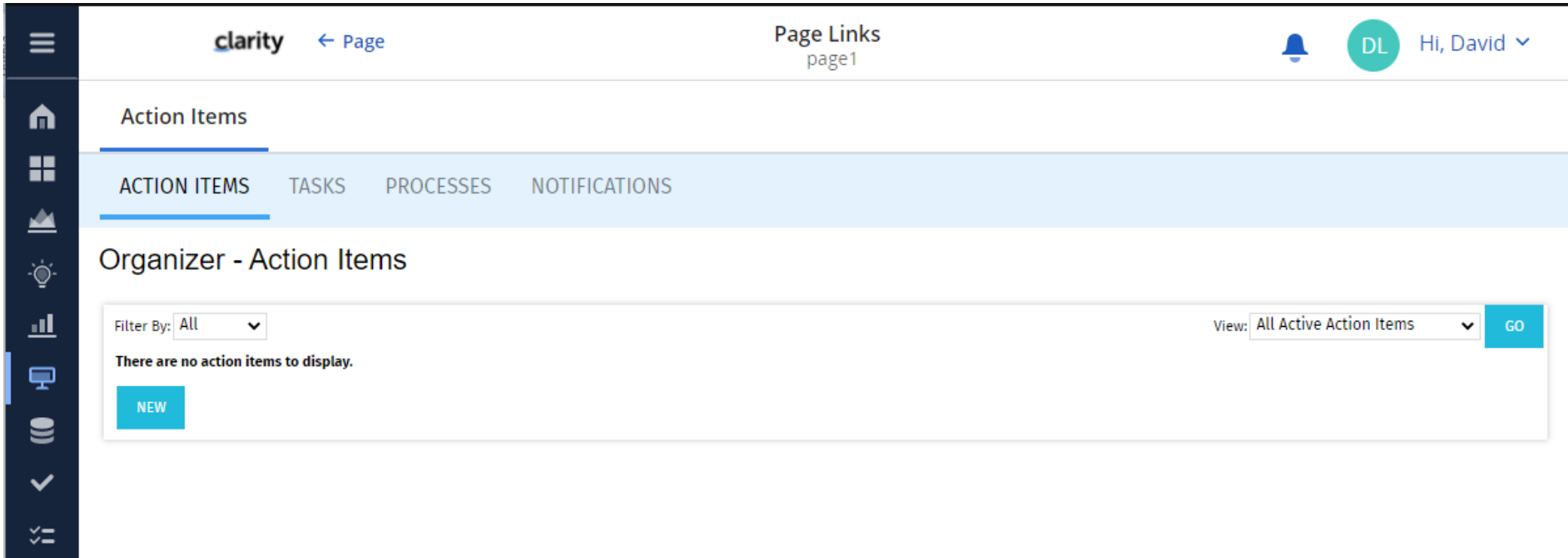
View Page – Classic UI

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.

Using Parameters in Page Channels #2

Here a string attribute called "Process Name" has been defined:

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

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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
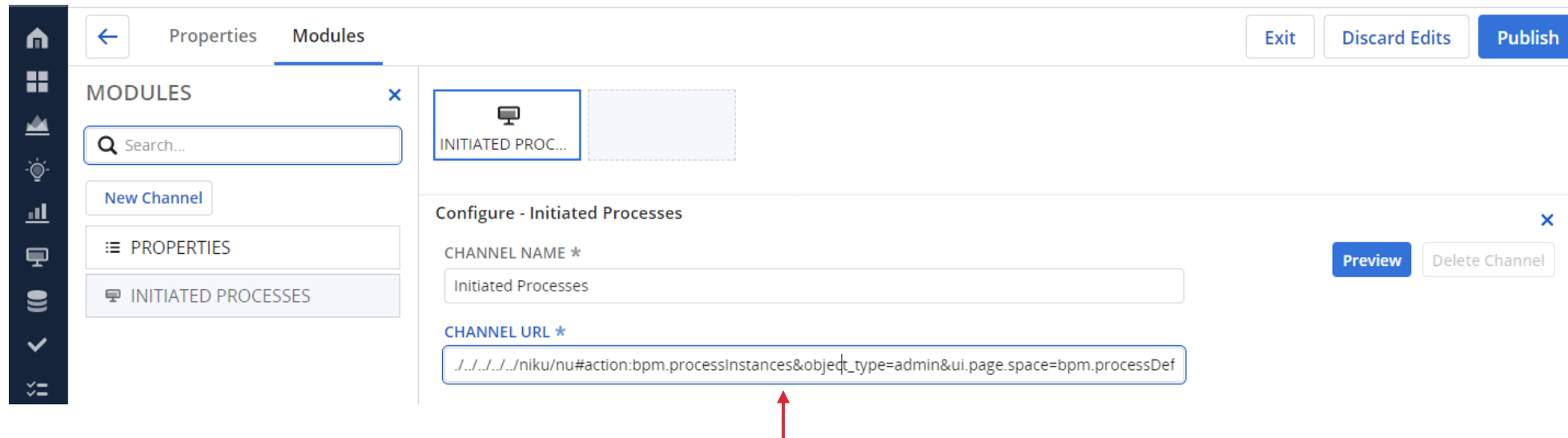
Using Parameters in Page Channels #4

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

Part 4:
Menu Links

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So What Are Menu Links?

Menu Links are similar to Page Channels but more limited:
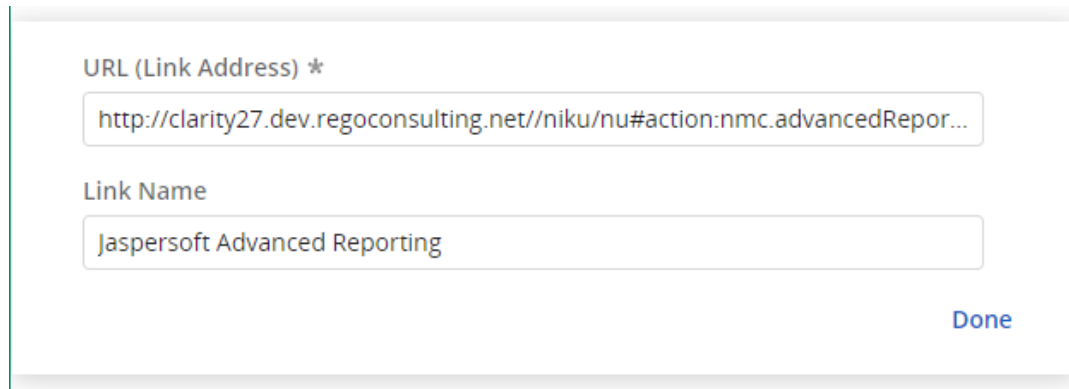
- Provide access to Clarity screens or other applications via a URL

- 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"
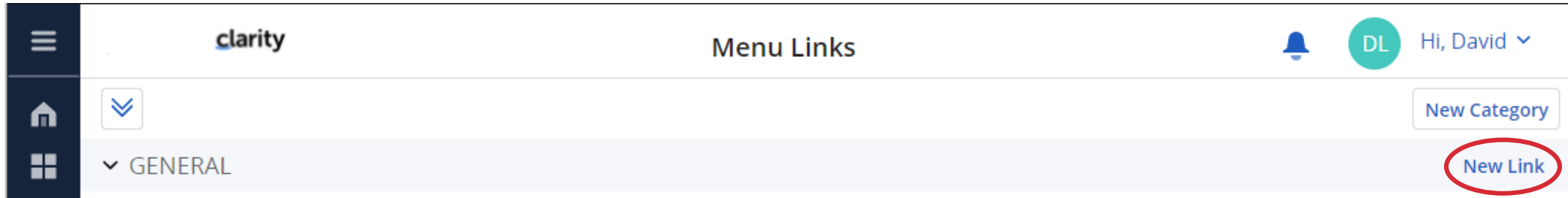
Enter the URL and a name for the Link, click "Done"

View Menu Link

3

Click on a Link:

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Part 5:
Considerations

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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
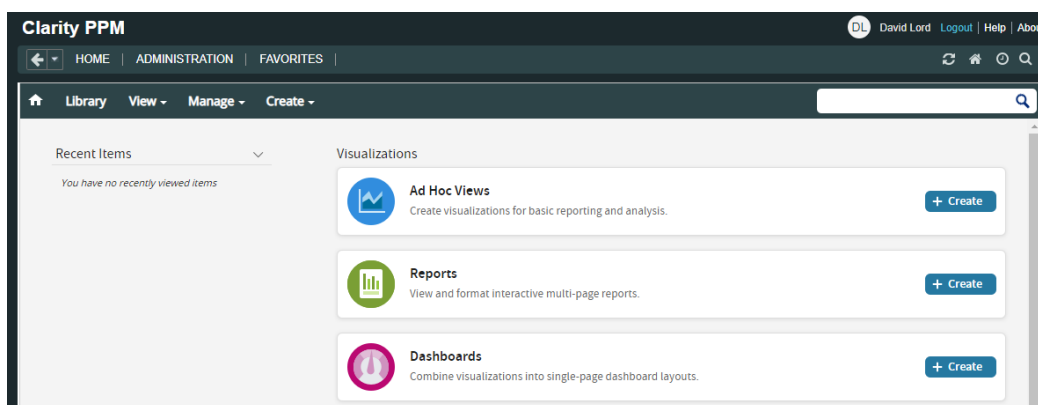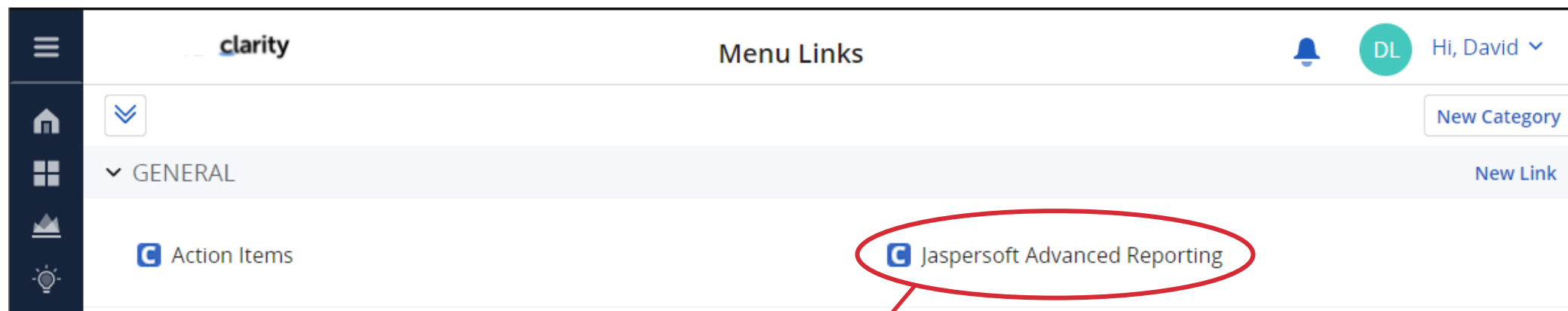- To avoid hardcoding URLs when referencing the Classic UI the following notation can be used:

./../../../../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

Questions?

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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.

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