

VISUALS

Search...

% COMPLETE

BUDGET REMAINING

BUDGET SPENT

DAYS REMAINING

DAYS TO START

EFFORT REMAINING

EFFORT SPENT

Project Name

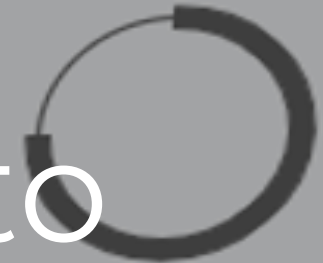
TIMELINE



NEXT MILESTONE



BUDGET REMAI...



EFFORT REMAIN...

MODULES

How much can be done to
configure the Modern UX?

Pemari Consulting Ltd

Andrew Litton

2007 - TODAY

About Me

I have been working in the Project Management Software consulting business since 1993, starting with Artemis, and then onto ABT, Niku and through it's rebranding to today and Clarity PPM.



Session Agenda

How much can be done to configure the Modern UX



Introduction

Administrator

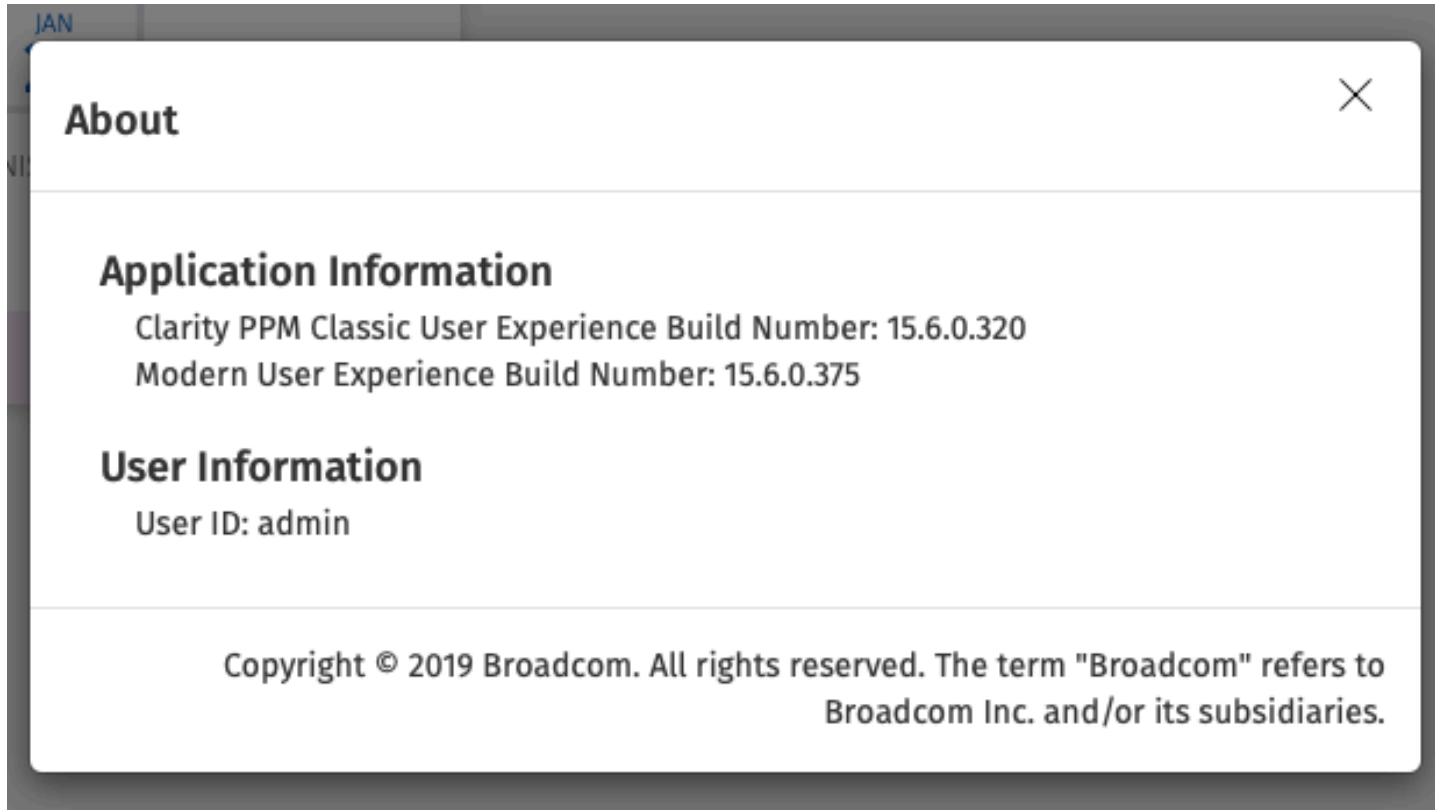
Personalization

Introduction

Introduction – The Modern UX

The screenshot displays the Clarity PPM dashboard interface. At the top left, there is a dark blue sidebar with a hamburger menu icon and several navigation icons. The main header area includes the text 'Clarity PPM', a notification bell icon, a user profile picture, and the text 'Hi, System' with a dropdown arrow. Below the header, there is a search bar with the placeholder text 'Search or filter...' and a 'NEW PROJECT' button. The dashboard features two main project cards. The first card, 'A Collaboration Initiative', is green and labeled 'ON TRACK'. It shows a progress bar from MAR 15, 2018 to OCT 1, 2020, with a 0% completion indicator, a finish date of OCT 01, and a next milestone of MAY 14. The second card, 'A Finance Process Change', is orange and labeled 'NEEDS HELP'. It shows a progress bar from JAN 14, 2019 to SEP 4, 2019, with 0% effort and budget spent, and a next milestone of MAY 22. Both cards have a bottom bar with icons for list view, attachments, checkmarks, and links. A 'MY TASKS' link is visible in the top right corner.

Introduction - Broadcom Clarity



**For
Clarity v15.6**

Introduction – Our experience

- Easier to use
- Not as configurable as Classic PPM
- Simpler functionality
- Improving with each release
- Channels and the Phoenix UI

Introduction - Activating the Modern UX

In Classic PPM under Administrator/System Options

New User Experience

ACTIVATE NEW USER EXPERIENCE	HIDE IE11 NOT SUPPORTED BANNER
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ACTIVATE TIMESHEETS	(Checking this box indicates your organization's understanding that CA PPM does not support Microsoft Internet Explorer 11 for the Modern UX and that your organization accepts the risks associated with the use of this browser option.)
<input checked="" type="checkbox"/>	

Introduction - Accessing the Modern UX

From Classic PPM

To add a new Menu Item to the Classic Application Menu see DocOps at:

<https://docops.ca.com/ca-ppm/15-6/en/using/getting-started-with-the-new-user-experience/new-user-experience-administration-and-configuration#NewUserExperience:AdministrationandConfiguration-CreateaMenuLinkinClassicPPMtotheppmnew>

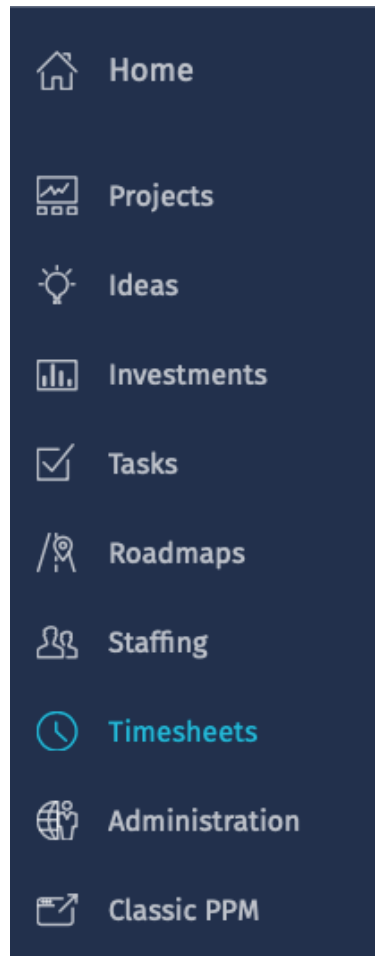
Directly via URL, e.g.

<https://centos.vm.pemari.com/pm>

Personal	New Product Development
General	Idea Management Dashboard
Organizer	Portfolio Management Dashboard
Dashboards	Executive Dashboard
Portlets	Stage Review
Advanced Reporting	Nova Dashboards
Account Settings	
Reports and Jobs	
Knowledge Store	
Plan & Manage Work	
Resource Management	
Timesheets	
Roadmaps	

Administrator

Administrator - Rights for Modern UX



Project Management - Navigate, + Project rights

Idea Management - Navigate, + Idea rights

<Investment Extension> - Navigate + <Investment Extension> Rights

Tasks - Navigate, + either Project rights or on Project Team/Staff

Roadmap - Navigate, + Roadmap rights

Staffing - Navigate, + Resource & Project rights

Timesheet - Navigate, + Timesheet rights and setup

Administration, + Blueprint and Team Rights

Classic PPM - Navigate

Administrator - Timesheets

- Still configured using Timesheet Options.
- Reduced field selection
- No indirect Time entry
- No per user personalisation's available

2

ALLOW POSTING OF FUTURE TIMESHEETS

Modern UX Options (applies to Modern UX Timesheet only)

ALLOW ENTRY OF LINE ITEM TOTALS

DISPLAY TIME ATTESTATION MESSAGE ON SUBMIT

(Time attestation message text can be edited in 'Timesheet Attestation Message' Lookup.)

= Required

APPLY TO ALL RESOURCES RESTORE DEFAULTS SAVE

Administrator - Timesheets

Clarity PPM Hi, System Administrator

GENERAL PARENT WINDOW **VALUES** AUTO SUGGEST

Lookup: Timesheet Attestation Message - Values

Partition: Organization: Agile

Lookup Value	ID	Partition	Partition Association Mode	Description	Active	System Type
By submitting this timesheet, I affirm that the actual work recorded on this timesheet is true, correct and accurate.	ATTESTATION_MESSAGE	System	Partition, ancestors and descendants		✓	System-restricted

100% SEARCH SUBMIT NOTES 1

CONFIRM

By submitting this timesheet, I affirm that the actual work recorded on this timesheet is true, correct and accurate.

16.00	16.00			80.00	1,506.00
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Administrator – Work Effort Display

DEFAULT DISPLAY UNIT FOR WORK EFFORT

Hours

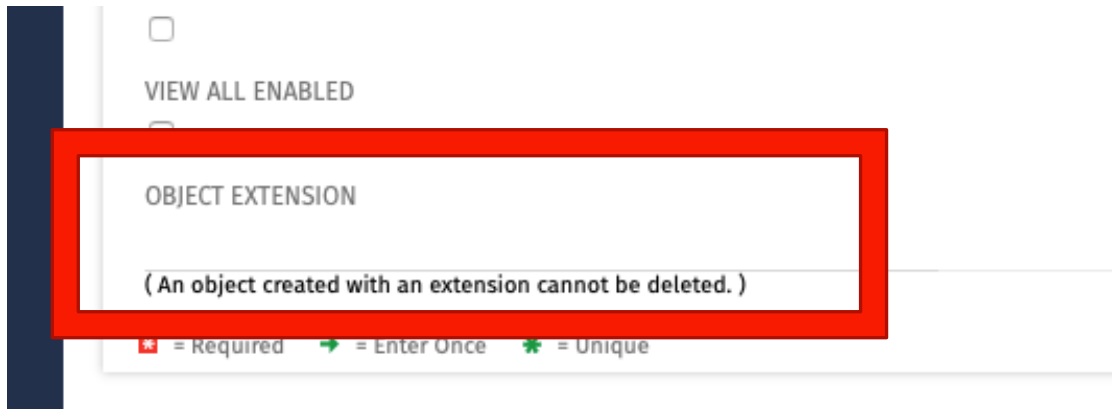
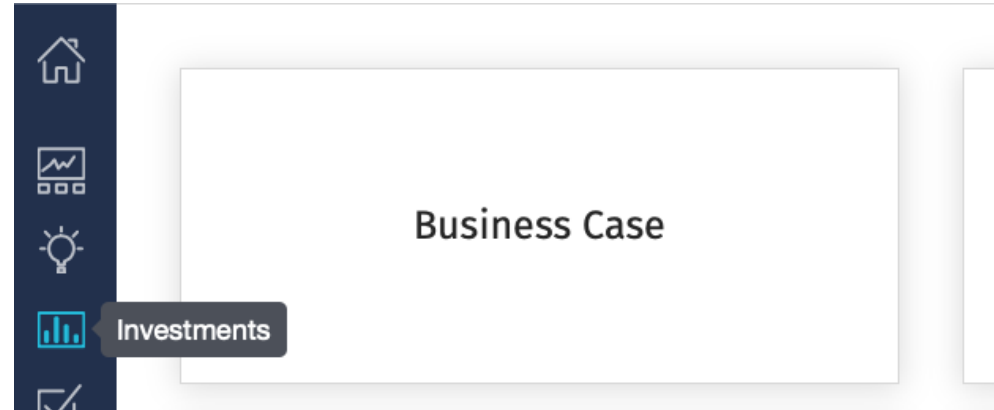
✓ Days

ENABLE INVESTMENT-SPECIFIC CHARGE CODES

- Still configured using Project Management Settings

Administrator – Investment Extensions

- Can add additional Investment types for Modern UX
- Grid only view
- Event enabled

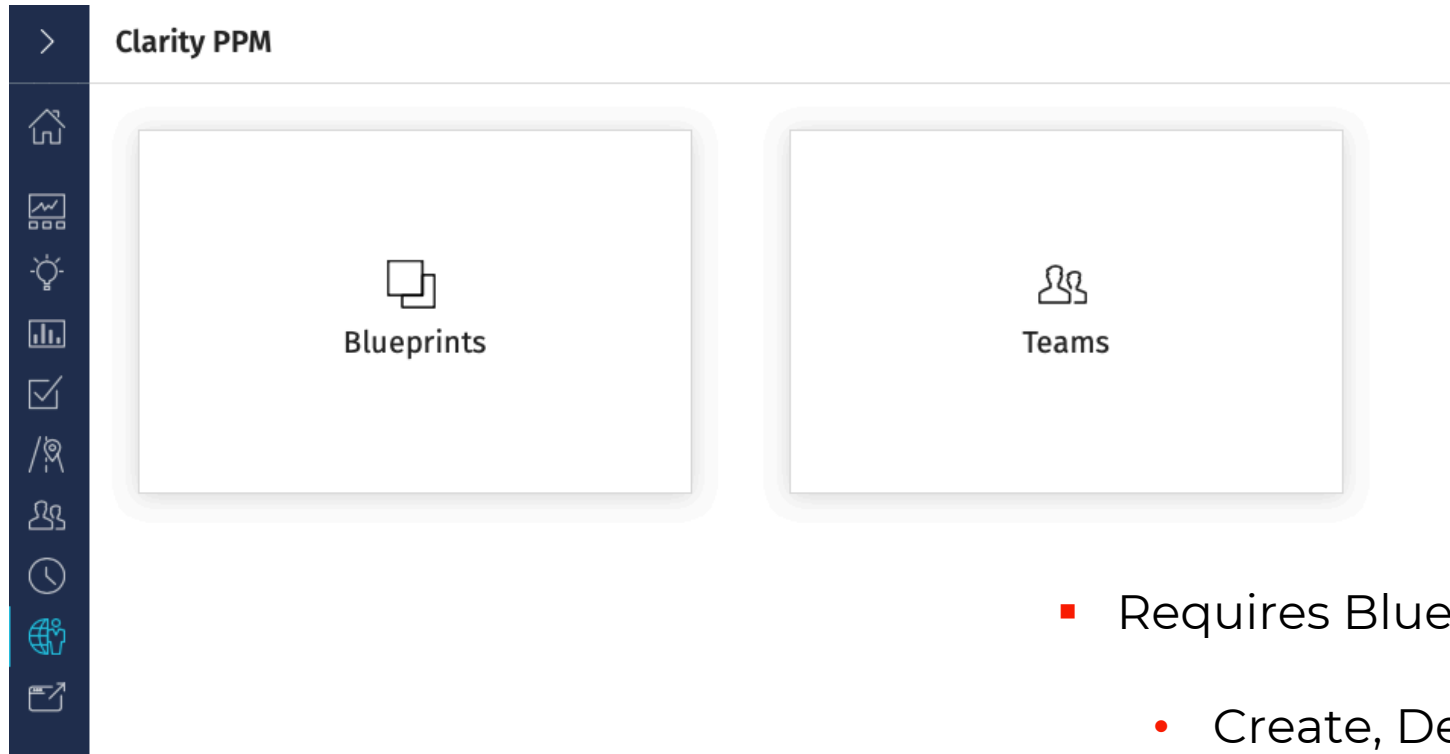


- Added via Studio/Objects in Classic PPM
- Set Object Extension on creation
- No views for Classic
- Can add custom attributes – must set API Attribute ID

Administrator – Unsupported Field/Attribute Types

- Not all Clarity PPM Classic Attribute types supported
- For Projects – no access to the financial attributes, i.e. Investment Class etc
- Any out of the box attribute without an Attribute API ID set
- Attribute types not supported:
 - URL
 - Attachment
 - Custom time-scaled value (TSV)
 - Parameterized Lookups
 - Static Dependent Lookups

Administrator - Administration in Modern UX



- Requires Blueprint/Team rights to see the tiles
 - Create, Delete, Edit and View
 - Global Rights only

Administrator - Teams



Teams

Clarity PPM

[NEW TEAM](#) ACTIVE STATUS: Active

TEAM	RESOURCES	MODIFIED
Cloud Hackers	11	Apr 2, 2019
Dancing Gnomes	18	Apr 2, 2019
Grumpy Clowns	0	Oct 15, 2018
Irrational Avengers	0	Oct 15, 2018
Titanium Hops	0	Oct 15, 2018

- Can create new Teams
- Add resources to a Team
- Automatically handles allocation % based on membership to other teams
- Does not affect the Resource availability

Administrator – Configuring Blueprints



Blueprints

BLUEPRINT	TYPE	LAST
> A Corporate Blueprint	Project DEFAULT	Apr 5
Applications	PLA Applications STANDARD	
Business Case	Business Case STANDARD	
Business Case Master	Business Case DEFAULT	Apr 3
> Demand	Project	Apr 5

- For Projects or Investments enables the configuration of the Details page
- For Projects enables the configuration of the Project Tiles and Modules functionality available
- **Standard** Blueprints are system created
- **Default** Blueprints are used for Projects or Investments that do not have a Blueprint defined
- Copy the relevant standard Blueprint or any other user-defined Blueprint.

Administrator – Blueprint Details

Clarity PPM IT - EDIT MODE

DETAILS VISUALS MODULES

FIELDS

ADD SECTION

% COMPLETE

% DONE BY AGILE PLAN ESTIMATE

% DONE BY STORY COUNT

ACCEPTED STORY POINTS

ACCEPTED USER STORIES

ACCOUNT MANAGER

ACTIVE

ACTUALS

AGILE ACTUAL FINISH

AGILE ACTUAL START

PROJECT SUMMARY

PROJECT NAME * PROJECT ID *

START * FINISH * % COMPLETE

DEPARTMENT OBS

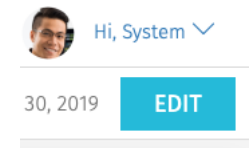
OBJECTIVE

STAKEHOLDERS

MANAGER SPONSOR

PROJECT MANAGEMENT OFFICE FINANCE AND GOVERNANCE

- Switch to Edit Mode



- Fields to add on Left
- Drag and Drop as well as click to Add
- Fields are required to have an API Attribute ID set

Edits persist until published or discarded

Hi, System

EXIT DISCARD EDITS PUBLISH

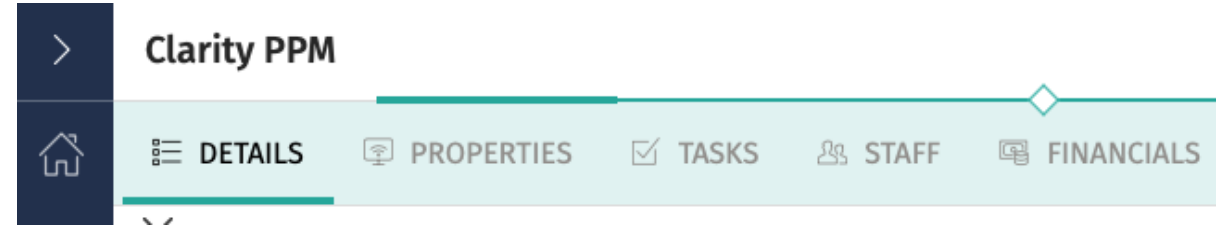
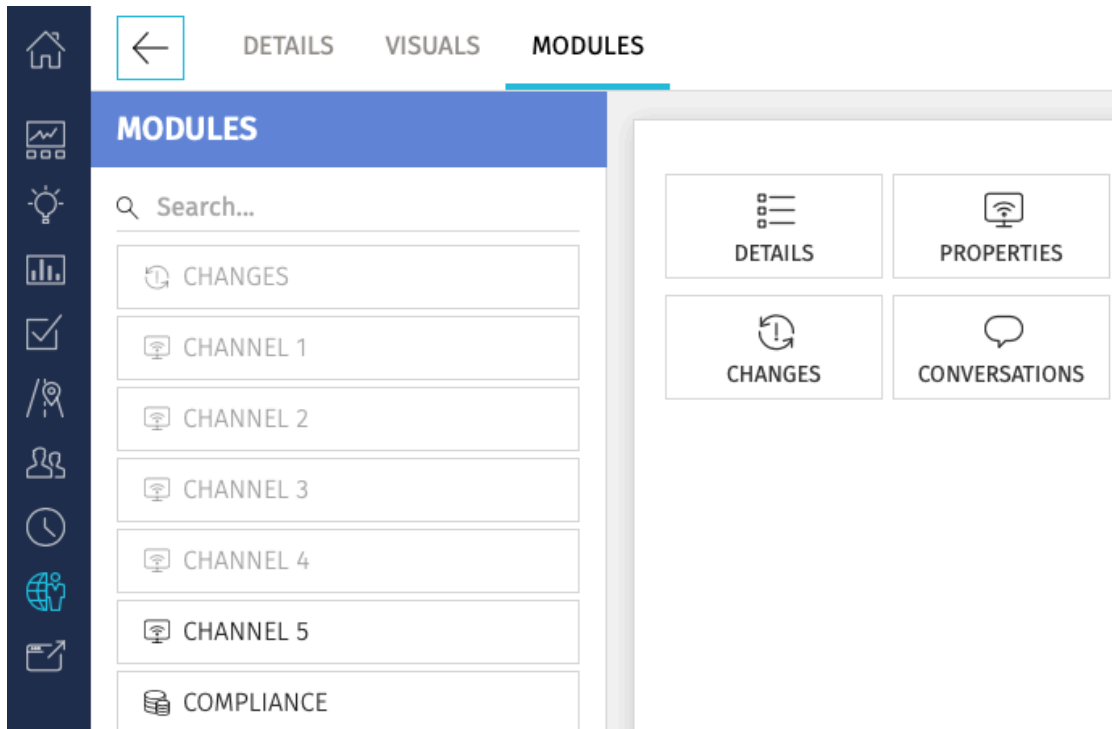
Administrator – Blueprint Visuals

- Allows the configuration of up to 3 visuals on project tile
- 9 available attributes
- Drag and Drop

- Blueprint Visuals calculations available in DocOps

The screenshot shows the 'VISUALS' configuration page in the Administrator interface. The page is divided into three tabs: 'DETAILS', 'VISUALS' (selected), and 'MODULES'. A dark blue sidebar on the left contains various navigation icons. The main content area features a search bar and a list of 12 attributes, each with a radio button for selection. The attributes are: % COMPLETE, BUDGET REMAINING, BUDGET SPENT, DAYS REMAINING, DAYS TO START, EFFORT REMAINING, EFFORT SPENT, FINISH DATE, NEXT MILESTONE, and START DATE. To the right, a preview window shows a project tile layout. The tile is titled 'Project Name' and is divided into 'TIMELINE' and 'MODULES' sections. The 'TIMELINE' section contains three visual elements: a diamond icon labeled 'NEXT MILESTONE', a circular progress indicator labeled 'BUDGET REMAI...', and another circular progress indicator labeled 'EFFORT REMAIN...'. The 'MODULES' section is currently empty.

Administrator – Blueprint Modules



- Appear as tabs in project screen
- First four appear on Project Tiles
- Supports custom Project sub-objects
 - Need to API Enable sub-object in Studio
- Does not support sub-sub-objects
- Channels - configurable

Administrator – Blueprint Module Channels

- Can Change the 'tab' name – Channel Name
- User defined parameterized URL

Configure - Properties

CHANNEL NAME *
Properties

CHANNEL URL *
`/niku/nu#action:projmgr.projectProperties&id=${internalID}&return_t...`

REFERRER URLS

Comma Separated

PREVIEW

Administrator – Blueprint Module Channels

URL Parameters/substitution variables

- Project ID \${internalID}
- Project Code \${code}
- User \${userName}
- Project Manager \${manager}
- Project Name \${name}

Also used with Links in the Project Links Module

Administrator – Blueprint Module Channels

For embedding Classic PPM pages and if using the Phoenix UI

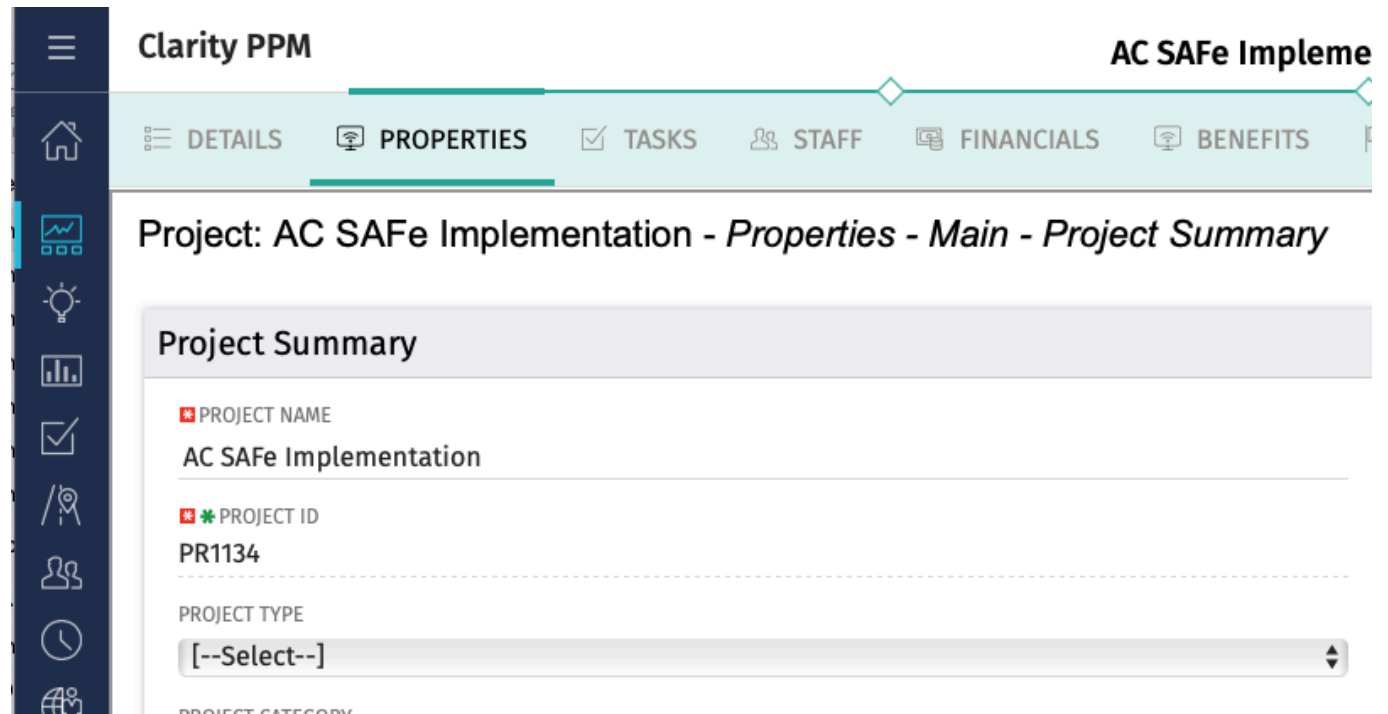
Options to add to the URL

&puiHidePPMTabs=on

Hides the Classic UI Project tabs

&puiFullscreen=on

Hides the Classic UI Menu's etc



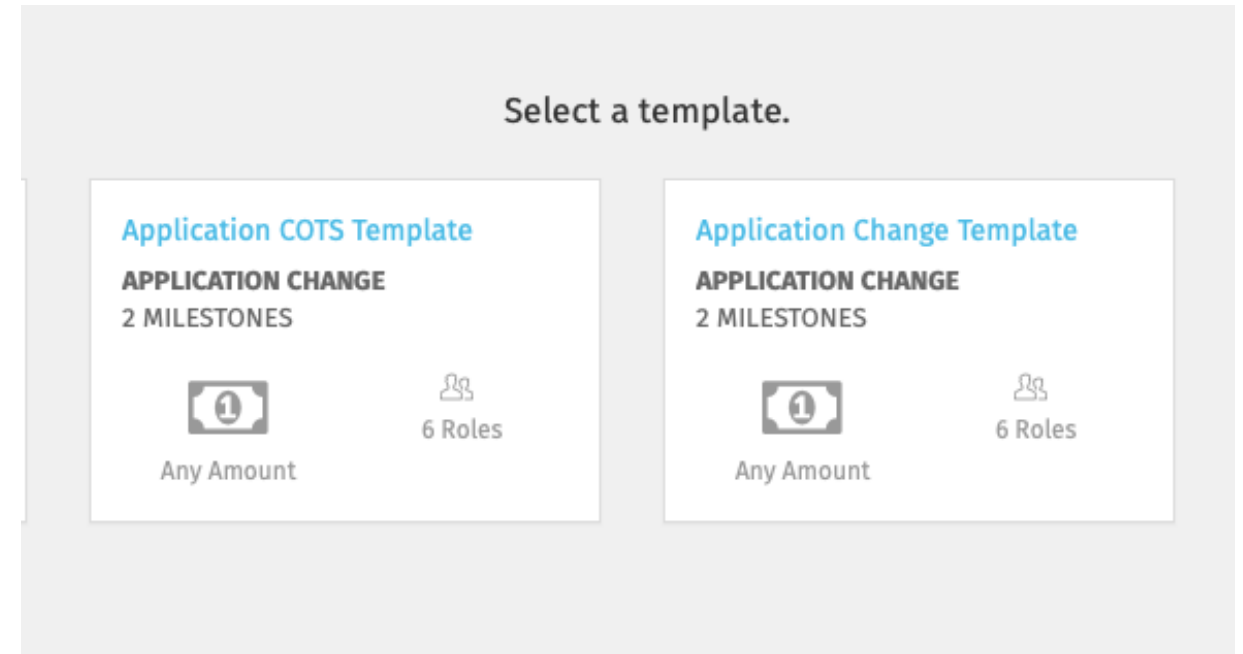
The screenshot displays the Clarity PPM interface. At the top, the title 'Clarity PPM' is visible on the left and 'AC SAFe Impleme' on the right. Below the title bar, there is a navigation menu with tabs: 'DETAILS', 'PROPERTIES', 'TASKS', 'STAFF', 'FINANCIALS', and 'BENEFITS'. The 'PROPERTIES' tab is currently selected. The main content area shows the project title 'Project: AC SAFe Implementation - Properties - Main - Project Summary'. Below this, there is a 'Project Summary' section with the following details:

- PROJECT NAME:** AC SAFe Implementation
- PROJECT ID:** PR1134
- PROJECT TYPE:** [--Select--]
- PROJECT CATEGORY:** (partially visible)

`/niku/nu#action:projmgr.projectProperties&id=${internalID}&puiHidePPMTabs=on&puiFullscreen=on`

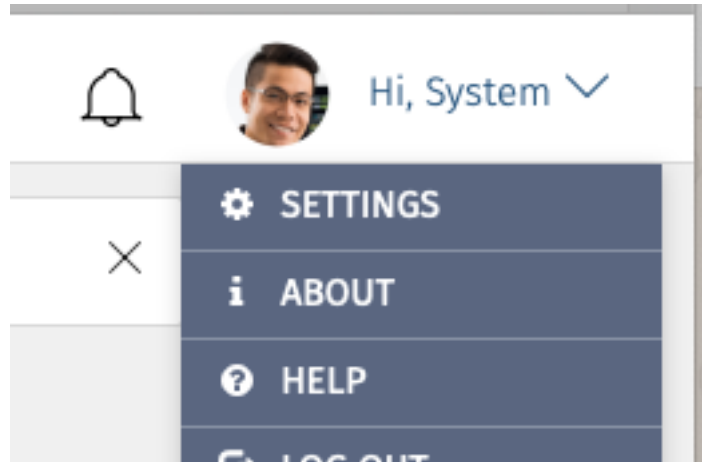
Administrator – New Projects

- Project creation requires at least 1 template project – and user needs rights to create projects and see the templates.
- Templates are automatically associated with the default Blueprint if no value is set
- Suggest add the Blueprint attribute to the Classic PPM Project Settings sub-page to enable editing/changing
- Links defined in template are also copied



Personalization

Personalization – Settings/Profile Settings



Provides ability to upload image that appears throughout the Modern UI, i.e. Staff in projects or project tasks, collaboration.

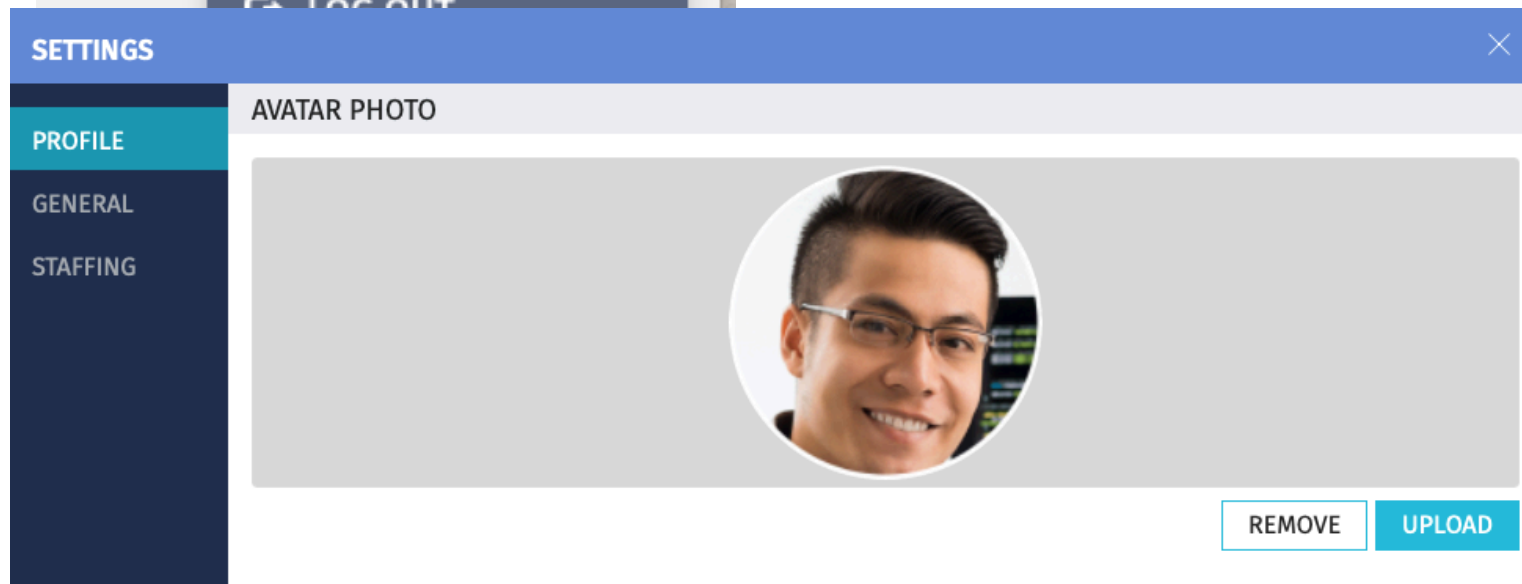
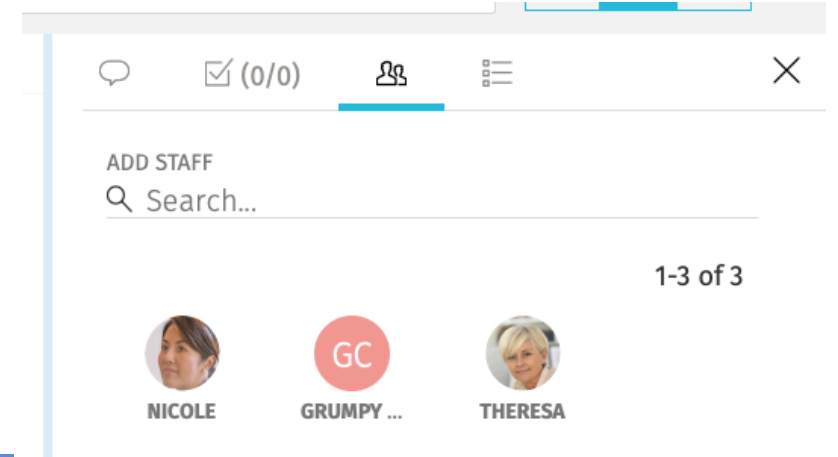
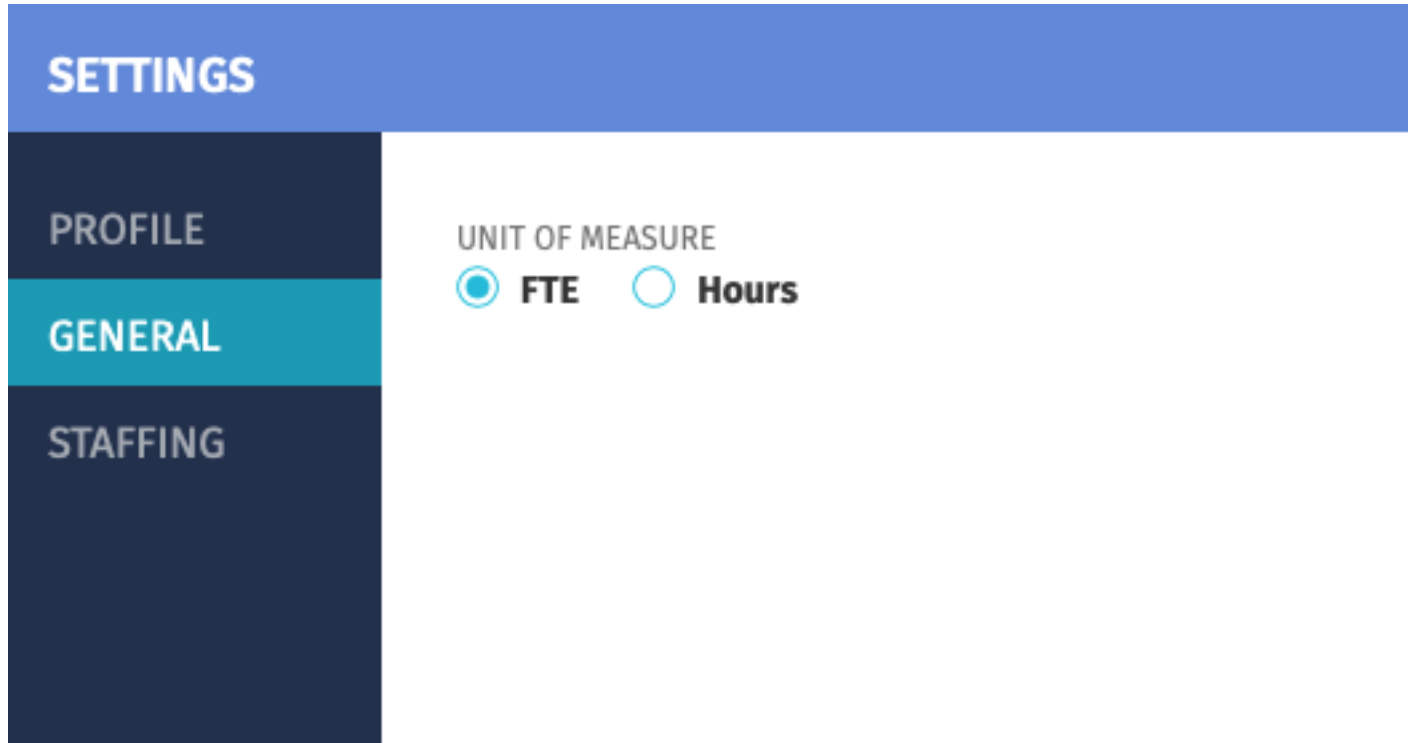


Image size recommended:
80x80 pixels at 150DPI and
250KB or smaller

Personalization – Settings/General



Used by Project Tasks and Project Staff views.

Personalization – Settings/Staffing

Only available with **Staffing** –
Navigate right

Time Periods used are from the
default Entity.

Use Allocation threshold to highlight
under of over allocation

SETTINGS

PROFILE
GENERAL
STAFFING

START PERIOD:

TIME PERIOD SPAN:
Select a period type for each span. You can create a total of 60 time periods across all time period spans.

1:

2:

3:

4:


UNIT OF MEASURE:
 FTE Hours

DECIMAL DISPLAY:
 0.00 0.0 0

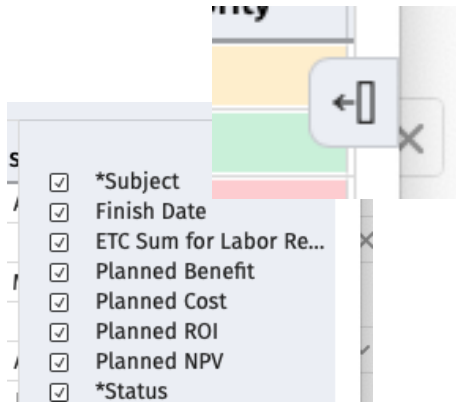
CURRENCY:
\$USD

ALLOCATION THRESHOLD:
The Resources to Investments view determines the telescope gradient colors based on allocation data by resource. Set the gradient scale to indicate resources that need your attention over any time period. Hover over any color to see the threshold range.

HEAT MAP:

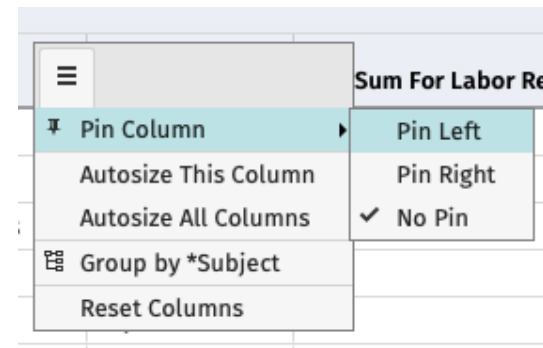


Personalization – Grids



- Column panel – To add columns to grid.
- Drag and drop enabled for groups, moving/removing columns
- Click on column header to sort – Shift click to multicolumn sort

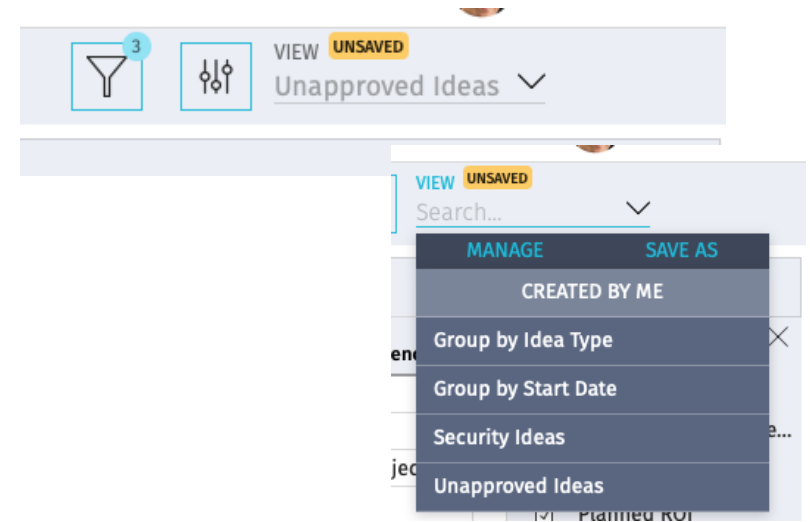
- Not all grids export to CSV
- Not all grids support filters
 - Risks, Issues, Changes, Staff, Financials
- Not all grids support grouping
 - Risks, Issues, Changes, Staff, Roadmaps



- Select Burger on column header to perform actions

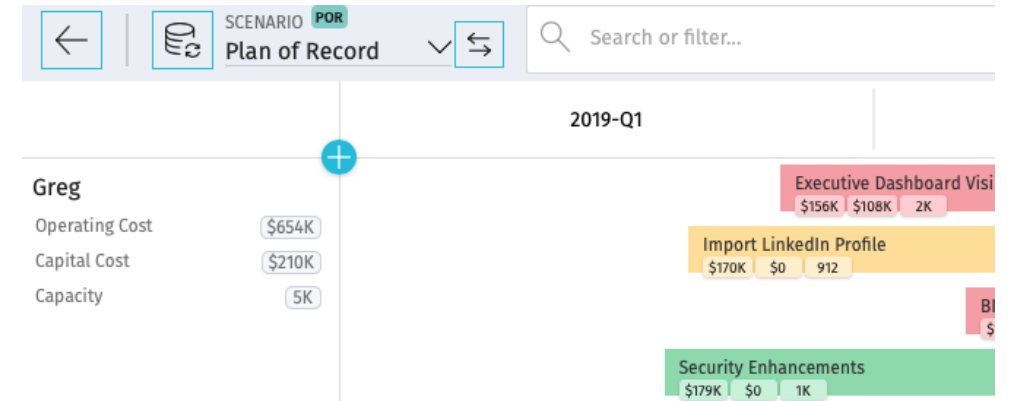
Personalization - Views

- Changes persist
- View appears as Unsaved
- On Save are then available to all users of system
- Selecting a different view loses unsaved changes
- Manage allows for the deletion of my views and hiding views of others
- Not all Grids support saving of View
 - Risks, Issues, Changes, Staff, Project Tasks

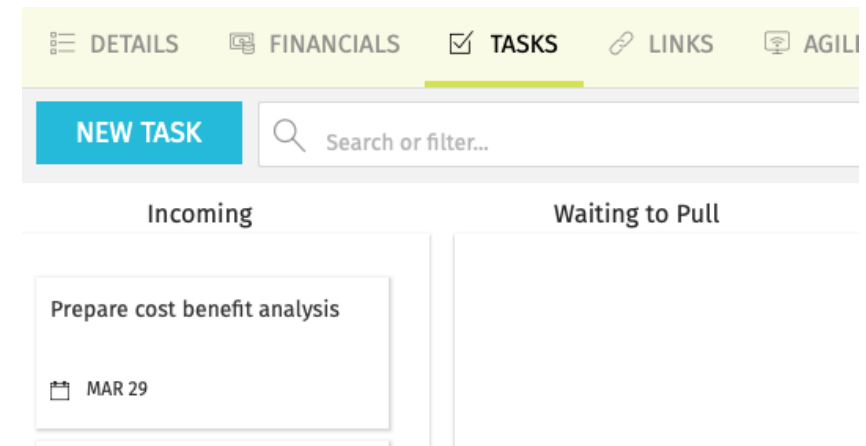


Personalization – Other Views

- Roadmap Timeline and Board
 - Similar to Grids – Filtering, Saved Views.



- Project Task Board – per individual



How much can be done to configure the Modern UX

Questions?

Thank you for attending

How much can be done to configure the Modern UX



Phone

+44 844 736 2500



Email

ppmacademy@pemari.com



Website

<https://www.pemari.com/>



**Let us know how we can
improve!
Don't forget to fill out the
feedback forms!**