



rego*U*niversity 2019

SAN DIEGO

# Migrating to the Modern UX | Best Practice and Lessons Learned

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# Introductions

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



# Agenda

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- Introduction
- Modern UX Overview
  - Modern UX Functionality Overview
  - Modern UX Functionality by Role
- Strategic Planning
  - Rego's Best Practice Recommendations
  - How to Evaluate Your Organization
  - Transition Paths
  - Example Transition Plan - Crawl-Walk-Run
- Use Case Study
  - Evaluation
  - Recommendation
- Roadmap
- Discussions and Questions



# Part II: Modern UX Overview

What does the Modern UX have to offer your organization?



Let Rego be your guide.

# Modern UX Overview - Functionality

## Project Tiles

Add project details, financial details, status, team, modern task management, risks, issues, CRs, links, documentation, and more!

## Ideas

Grid based Idea planning

## Investments

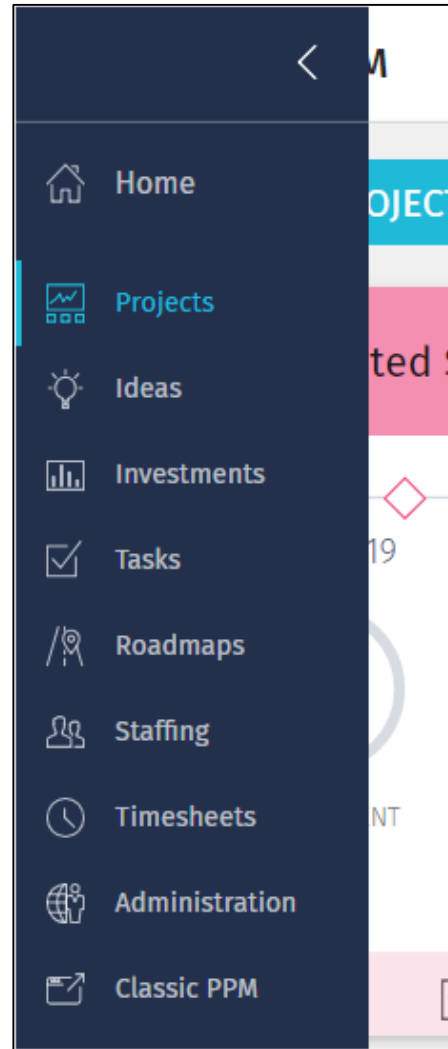
Develop custom grid based investments to bring new business to your portfolio

## Tasks

The My Tasks page now includes a new to-do item scoreboard.

## Roadmaps

Use roadmap items to plan for the future of your business.



## Staffing

Use Staffing to plan role allocations, request resources, and staff investments with the right resources including conversations

## Timesheets

Use timesheets to track your work hours.

## Administration

Admin access for configuring Blueprints and Modern UX Teams

## Classic PPM

The Classic PPM icon provides access to Classic Clarity PPM Planning Board

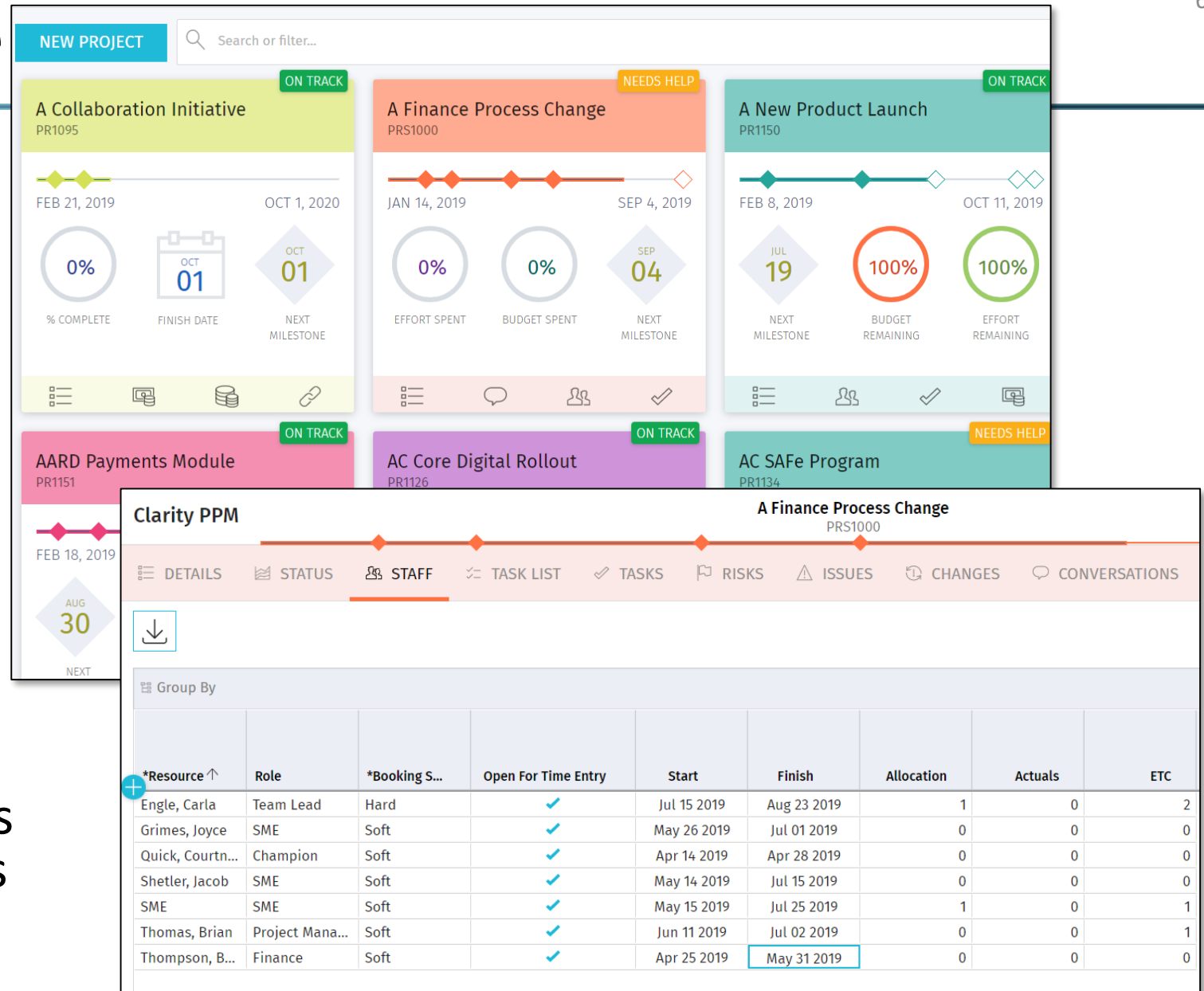
# Modern UX by Role

## Project Manager

Create, Open, Manage Projects  
Manage Project Details  
Manage Project Documentation  
Measure Progress and Status  
Modern Task & Assignment Management

## Project Coordinator

Request resources and roles  
Start and maintain Conversations  
Utilize Modern UX Staffing Views



# Modern UX by Role

## Portfolio Manager

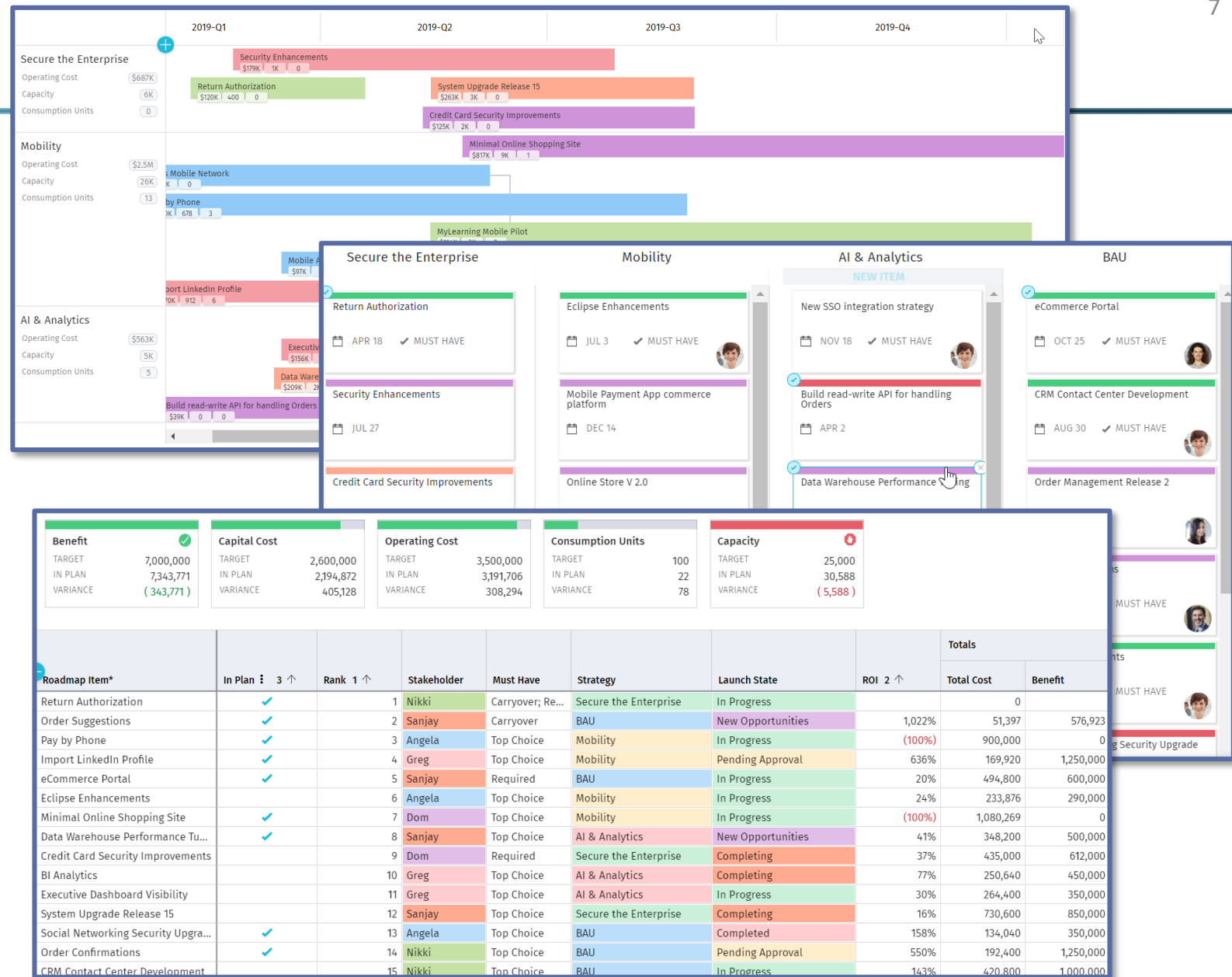
Strategically plan using Roadmap Kanban, Grids, and Timeline Views

“Click and Drag” To Plan Investments

Include existing Ideas, Projects, Custom Investments as well as Add New and Update work

Track and Plan against Targets

Create Stakeholder specific views for concise visualization



# Modern UX by Role

## Resource Manager

Utilize Resource Staffing for allocation and planning including personalization of view

Start conversations and manage replies

Review and Approve Timesheets

The screenshot displays the Clarity PPM interface, which is divided into several sections. The top section, titled "Resources Investments", shows a list of resources and their allocation across various time periods. Below this, the "Requests" section displays a list of requests and their status. The bottom section, titled "Conversations", shows a list of conversations and their details.

**Resources Investments**

	Mar 10, 2019 FTE	Mar 17, 2019 FTE	Mar 24, 2019 FTE	Mar 31, 2019 FTE	2019-04 FTE	2019-05 FTE	2019-06 FTE	2019-Q3 FTE	2019 FTE
PINNED (3)	9.61	16.55	17.35	21.29	23.16	24.79	24.79	24.26	17.99
ALL									
> Ann Casey	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Anthony Carson	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.87
> Derrick Shaw	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Emily Roberts	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.79
> Emma Dawson	1.00	1.00	1.00	1.44	1.44	1.44	1.44	1.39	0.91
> Fred Garner	0.20	1.00	1.00	1.00	0.95	1.00	1.00	1.00	0.81
> Jack Hale	0.60	1.00	1.00	2.00	2.00	2.00	2.00	1.88	1.31
> Jerry Fletcher	0.40	2.00							
> Joanne Ford	0.60	1.00							

**Requests**

	Mar 10, 2019 FTE	Mar 17, 2019 FTE
Account Manager	2.00	2.00
Architect	7.41	10.01
Architect PS	5.00	5.00
Business Analyst	9.81	10.61
Business Architect	1.00	1.00

**Conversations**

DETAIL

CONVERSATIONS

Start a conversation...

System in a few seconds

Hey **Rosie Miller** - Is there a way I can guarantee that we get emma on this project? She worked on phase one and her experience is needed. THANKS!

Reply...



# Modern UX by Role

## Team Member

Manage To-Do's and personal tasks

Manage Task Conversations

Utilize the Modern UX To Do Scoreboard

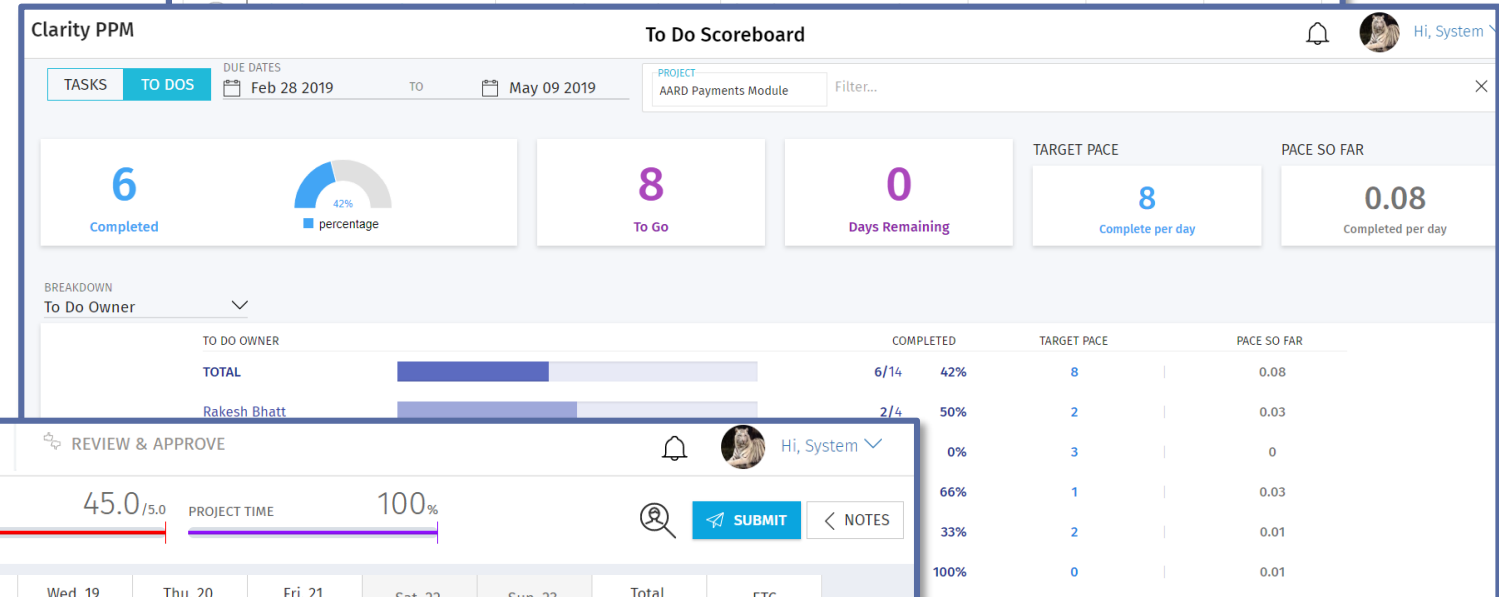
Submit Timesheets

TASKS

TO DOS

Search or Filter...

	Project Name	Name* ↑	Team Member	Start*	Finish*	ETC
	AC Core Digital Rollout	AC Core Digital Rollout	Architect; Business Analyst; Deve...	Mar 21 2019	Jul 02 2019	4,144
	AC SAFe Program	AC SAFe Implementation	Architect; Business Analyst; Deve...	Jan 14 2019	Oct 25 2019	11,480
	Ad Campaign Mgt Site	Ad Campaign Mgt Site	Carlos Perez; Network Engineer	Jul 01 2019	May 29 2020	3,840
	Strategic Planning and Steering	Adapt Quarterly		Mar 04 2019	Mar 14 2019	0
	15.3 POC Team Board	Add your avatar		Feb 04 2019	Feb 04 2019	0
	Security Compliance	Additional Development	Developer	Mar 18 2019	Mar 18 2019	480
	Wisconsin Rapids Hospital Re-ha...	Additional Site work	Paul Martin; System Administrator	May 27 2019	Jul 12 2019	80
	Web Based Trading	Additional Site work		May 07 2019	May 20 2019	0
	Wisconsin Rapids Hospital - Faci...	Additional Site work	Paul Martin	Jun 19 2019	Jul 02 2019	80
	Industry Trade Show	Advertising and press kits	Brian Robinson; Ray Fowler	Mar 07 2019	Apr 03 2019	8
	International Trade Show	Advertising and press kits	Leigh Clark; Matt McBride; Nick ...	Mar 04 2019	Apr 10 2019	64
	Aurascope XA - Project	Affirm decision to continue c...	Financial Analyst; Marketing Ana...	Jan 15 2020	Jan 20 2020	48



Clarity PPM

MY TIMESHEET REVIEW & APPROVE

Jun 10 - Jun 16 OPEN Jun 17 - Jun 23 OPEN Jun 24 - Jun 30 CLOSED

DAYS 45.0/5.0 PROJECT TIME 100%

WORK WORK

	Mon. 17	Tue. 18	Wed. 19	Thu. 20	Fri. 21	Sat. 22	Sun. 23	Total	ETC
Wisconsin Rapids Hospital Re-hab Parent Project (PRB1028)									
Additional Site work									
Site Acquisition	8.0	8.0	8.0	8.0	8.0			40.0	0.0
Bucket for Professional Fees (300.001)									
Professional Fees	1.0	1.0	1.0	1.0	1.0			5.0	0.0
Wisconsin Rapids Hospital Re-hab (-rmw)									718.4

# Part III: Strategic Planning and Your Organization

Dive into the functionality specifics of Roadmaps and Portfolios to find the one that fits your organizational planning



Let Rego be your guide.

# Rego's Best Practice Recommendation

The best practice approach for companies currently using the Classic UX is to move to the Modern UX when the features they need are transitioned over and they can continue to use Clarity without the loss in functionality that would impact business operations.

Companies that are less mature in their Clarity usage have been able to move over more quickly, but most organizations have not been able to full adopt the Modern UX due to specific functions that have not been fully moved over.

We recommend, where possible, that companies move partially to the Modern UX by implementing certain Modern UX features like the new Timesheet capability, resource planning, or roadmaps.

To improve the user experience for companies that are switching between the Modern UX and Classic UX, CA developed a capability called “channels” that allows a user to be within the Modern UX, and have a “window” into certain Classic UX features.

**Tip!**

Attend Rego's Webinars on What's New in 15.X sessions to familiarize your organization with the Modern UX

# How to Evaluate Your Organization

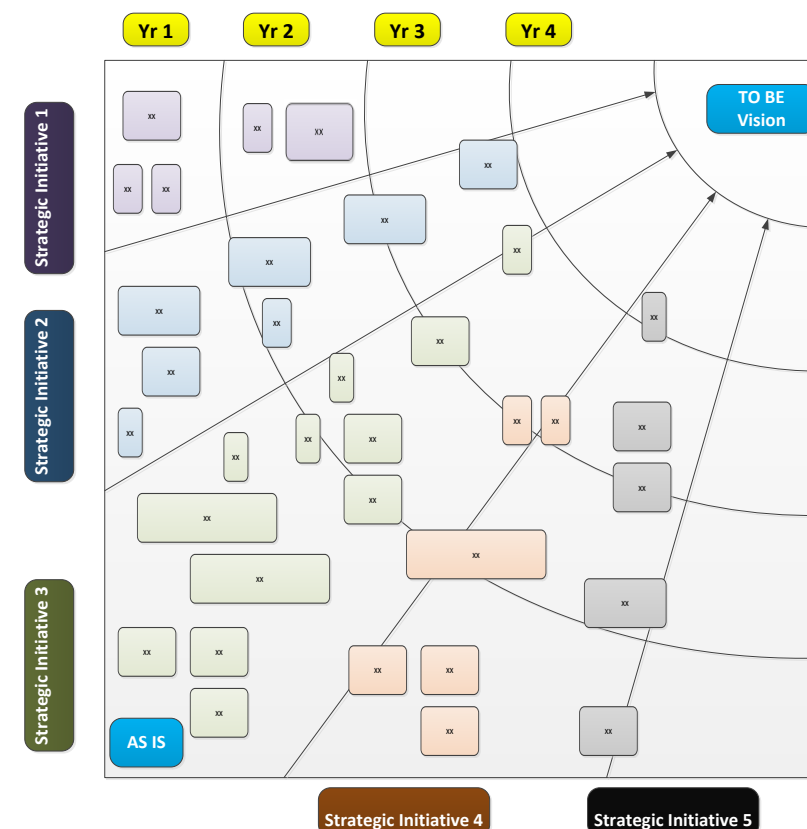
Start with the premise that we have a current state and a vision of where we want to be strategically.

## Evaluate the system and current state

- Health, Overall Design, Customization, Size / Scale, Users
- Survey all LOBs regarding adoption, pain points, and gaps

## Have a defined and documented PPM Maturity Roadmap

- Define your planning horizon (1 year, 5 years, etc.)
- Establish a measured deployment approach for each LOB.
  - Like any roadmap, detours may be taken in support of high priority / high impact new business requirements as well as external factors such as upgrades
- Establish adoption roadmap for some of the Modern UX Features by roles or functionality based on your specific needs and requirements.



# Transition Paths

As long as your organization isn't fully embedded in customizations and/or no major gaps have been identified by transitioning to the Modern UX, you are able to begin a transition plan. Start by asking the following questions:

## Role Based Transitioning

- Can an entire user group transition 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 the Modern UX?
- Is there a user group that needs a “refresh” of the tool?

## Functionality Based Transitioning

- Can we utilize the Modern UX for some functionality while still remaining in Classic UX with minimal user disruption? (i.e. 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 transition?

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



### Tip!

If you are finding that your organization is fully embedded in customization, complete a functionality assessment to optimize configuration and transition toward OOTB modules before focusing on the Modern UX.



# Example Transition 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

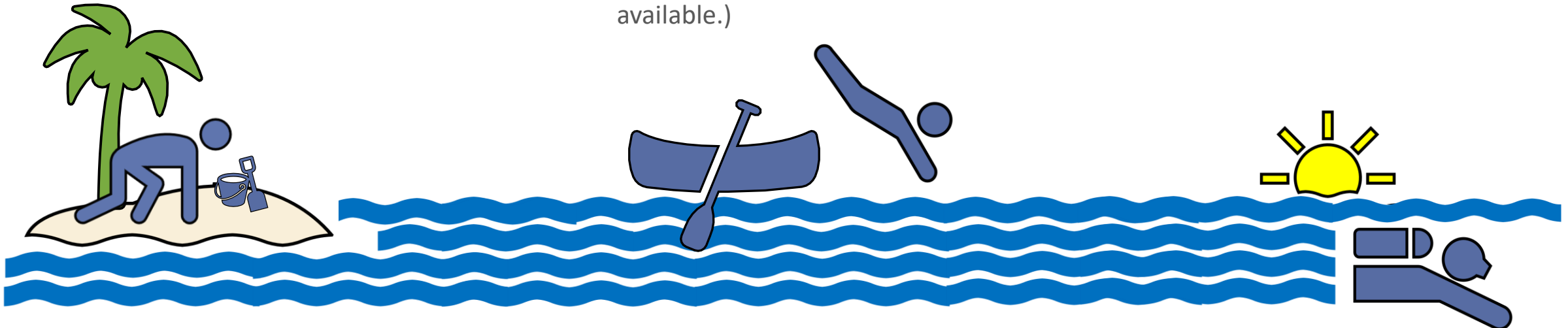
Resource Managers in the Modern UX. Utilize the Staffing module for Planning (Formal requisitions not available.)

## Run

### Explore the depths of the ocean!

All Team Members including Project Managers, Resource Managers, and Portfolio Managers are exclusively utilizing the Modern UX and fully transitioned from Classic UX for module functionality.

Reporting remains in Jaspersoft or Power BI



# Part IV:

## JPMC - Modern UX Case Study

Let's take a look at a real world example of a customer assessment recommendation.



Let Rego be your guide.

# JPMC and Rego Case Study - Evaluation

## Rego's Approach

Rego assembled a team of subject matter experts with ClarityFunctional and Technical expertise as well as PMO and Business Process expertise to take a fresh look at JPMC's current on-premise configuration and utilization. Rego's analysis was based on:



Meta data analytics against JPMC's production database using Rego tools designed to summarize utilization



An exhaustive review of JPMC's current state Clarityutilization, configurations, and practices via a series of live "boot camp" sessions lead by JPMC's experts



An independent review by Rego Functional SMEs of JPMC's configurations and utilization using a live JPMC environment



An upgrade to Clarity15.5 using a sandbox provisioned for this purpose combined with JPMC's Clarity dataset (user data + JPMC configurations)

# JPMC and Rego Case Study - Evaluation

## Rego's Overall Assessment of JPMC's Current State Implementation



A generally healthy deployment that leverages a broad set of out-of-the-box capabilities including Time Management, Project Management, Resources Management, and Financial Management.



No major complaints from users about system response times



Given JPMC's use of the base product, there are comparatively few customizations and configurations



Especially noteworthy client configured solutions were identified but not deemed as road blocks.

# JPMC and Rego Case Study - Evaluation

## JPMC-Specific Considerations

There are unique characteristics of JPMC's Clarity(Clarity) implementation that must be taken into account when evaluating the system's health and overall design:



Size and scale. JPMC has over 50,000 users, including the Time Entry user community. 10K to 15K users in the system on any given workday. 1,600 peak concurrent users



10+ disparate LOBs onboarded. This requires a foundational solution that can still be personalized by each LOB.



PMO Finance Requirements are granular and driven by business requirements

Considering the above, JPMC has done well to strategically evaluate each capability that requires a deviation from the out-of-the-box solution. A well-defined purpose must be articulated before moving beyond any comparable stock solution.



# JPMC and Rego Case Study - Evaluation

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## JPMC-Roadmap / Deployment Approach

JPMC has a defined and documented PPM Maturity Roadmap that they follow

- 📍 This is best practice and often overlooked.
- 📍 This establishes a measured deployment approach for each LOB.
- 📍 Like any roadmap, detours have been taken in support of high priority / high impact new business requirements as well as external factors such as upgrades
- 📍 In addition, JPMC recently surveyed all LOBs regarding adoption, pain points, and gaps.



# JPMC and Rego Case Study - Recommendation



For JPMC, a very mature Clarity implementation, use of the Modern UX exclusively would interrupt business operations by creating serious gaps in processes (e.g. charge backs) and reporting (due to data gaps).



Asking practitioners to complete some of their work via the Classic UX and other work in the Modern UX would add complexity to the Practitioner's user experience, require extensive organizational change management (OCM), and add a burden to the Clarity support staff.



The Modern UX simply isn't ready for JPMC to embrace fully. Although JPMC cannot move fully to the Modern UX today, JPMC can move to adopt certain features within the Modern UX now and then over time adopt other portions, as features/functions become available – with the goal of moving fully to the Modern UX by Q1 2020.

# JPMC and Rego Case Study - Recommendation

## High-Level Roadmap for JPMC to adopt some of the Modern UX Features

Modern UX Feature	Value Proposition
Roadmaps	<ul style="list-style-type: none"> <li>Visual representation of a Roadmap</li> <li>Easy to use / low learning curve</li> <li>Supports Project sync</li> <li>Included in Jaspersoft</li> <li>Can set targets, perform scenario planning, and save views</li> </ul>
Resource Management	<ul style="list-style-type: none"> <li>Easily toggle between Resource vs. Investment View</li> <li>Can copy / paste Allocations to / from Excel</li> <li>Supports telescoping</li> </ul>
The Phoenix Theme	<ul style="list-style-type: none"> <li>Fresh, Web 2.0 look and feel</li> </ul>
Time Entry	<ul style="list-style-type: none"> <li>Fresh, Web 2.0 look and feel</li> <li>Supports UV1 (Application Alignment)</li> </ul>
Channels	<ul style="list-style-type: none"> <li>Enables access from within the Modern UX to everything in the Classic UI</li> <li>Honors the security in place in the Classic UI</li> </ul>
Mobile Timesheets	<ul style="list-style-type: none"> <li>Supports SSO</li> <li>TBD</li> </ul>

# Clarity PPM 15.7 – Persona Guide

Capability	Project Manager	Portfolio Manager	Team Member	Administrator
Task Timeline	✓			
Project & Idea Boards	✓	✓		
Ideas & Custom Investments with Sub-Objects & Cost Plans		✓		
Ideas – Convert to Projects	✓	✓		
Team Time – Individual Time Entry			✓	
OBS Filtering	✓	✓		
Static Dependent & Parameterize lookups	✓	✓		✓
Relabeling Stock Attributes	✓	✓		✓
Group By Updates	✓	✓		
Mixed Bookings, Role & Resource Replacement	✓			
To-Do's Drag & Drop positioning	✓		✓	
2-column configurable flyout	✓	✓	✓	✓
REST API - GA				✓



**Project Manager** – Delivering additional capabilities to manage Projects from end to end with a Board view, improved filtering, configuration, & Excel-like capabilities. Includes the ability to visualize Tasks in a timeline view with dependencies. Added support for Mixed Bookings & role / resource replacement



**Portfolio Manager** – Delivering additional capabilities to manage Demand with a Board view, improved filtering, & Cost Plans.



**Team Member** – Individual Team members will be able to enter time when their team is assigned to a Task. Delivering additional tools to support the way you & your team members want to work.



**Administrator** – Providing the ability to configure additional services in support of demand management and other investments with Blueprinting.

# Clarity PPM 15.7.1 – Persona Guide

Capability	Project Manager	Portfolio Manager	Team Member	Administrator
Ideas with Staff, Tasks, Budgets, Benefits, Timesheets & More...		✓	✓	✓
Custom Investments with Staff, Tasks, Budgets, Benefits, Timesheets & More...		✓	✓	✓
Menu Level Channels	✓	✓	✓	
Investment Hierarchy for Digital Product Management		✓		
Mobile Approvals	✓	✓		



**Project Manager** – Provide the ability for users to access information outside the context of a single project. Also, you now have the ability to approve timesheets from your mobile device.



**Portfolio Manager** – Delivering a complete set of services for demand management & other investment types with Staffing, Budgets, Benefits plans, & the ability to capture labor & non-labor costs. Delivering a flexible hierarchy to support an organizations move to adopt digital product management. Lastly, the ability to approve timesheets from your mobile device is planned.



**Team Member** – The ability to enter time spend on Custom Investment and Ideas before they become funded investments.



**Administrator** – Delivering additional services that can be configured in support of demand management & non-project investment management using Blueprinting.



# Part V: Discussions

Open the floor up for discussions and examples that attendees are seeing within their daily responsibilities.



Let Rego be your guide.

# Questions?



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# Thank You For Attending regoUniversity

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- 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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