



regoUniversity 2019

SAN DIEGO

# Using Blueprints in the Modern UX | Best Practices

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# Introductions

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



# Agenda

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- Blueprint Overview
  - What are blueprints?
- Blueprint Administration
  - Navigating to Blueprints
  - Blueprint Views
  - Blueprint Configuration
- Blueprint Demo
- Blueprint Best Practices

# Part I: Blueprint Overview

Discuss Overview of OOTB Clarity Blueprints

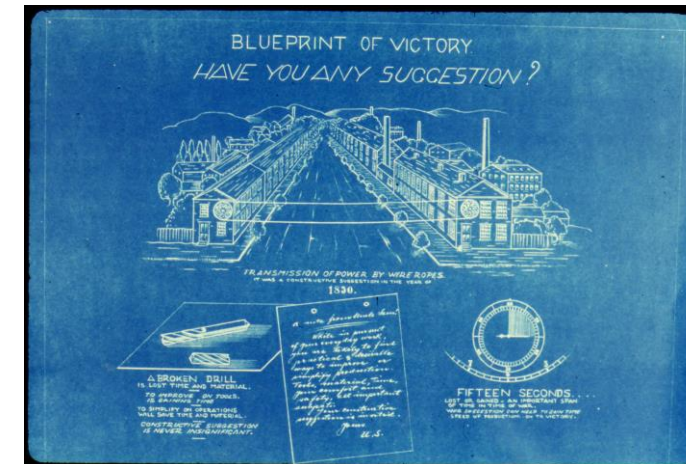


Let Rego be your guide.



# 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



# Overview – Blueprints vs. Templates

## Templates...

- Set the **Data**
- Use Templates to default project data, create template tasks, pre-populate Roles
- Blueprint ID is an example of the data that is set in the template

## Blueprints...

- Set the **Layout**
- Use Blueprints to determine what attributes and modules are displayed for editing

# Part II:

# Blueprint Administration

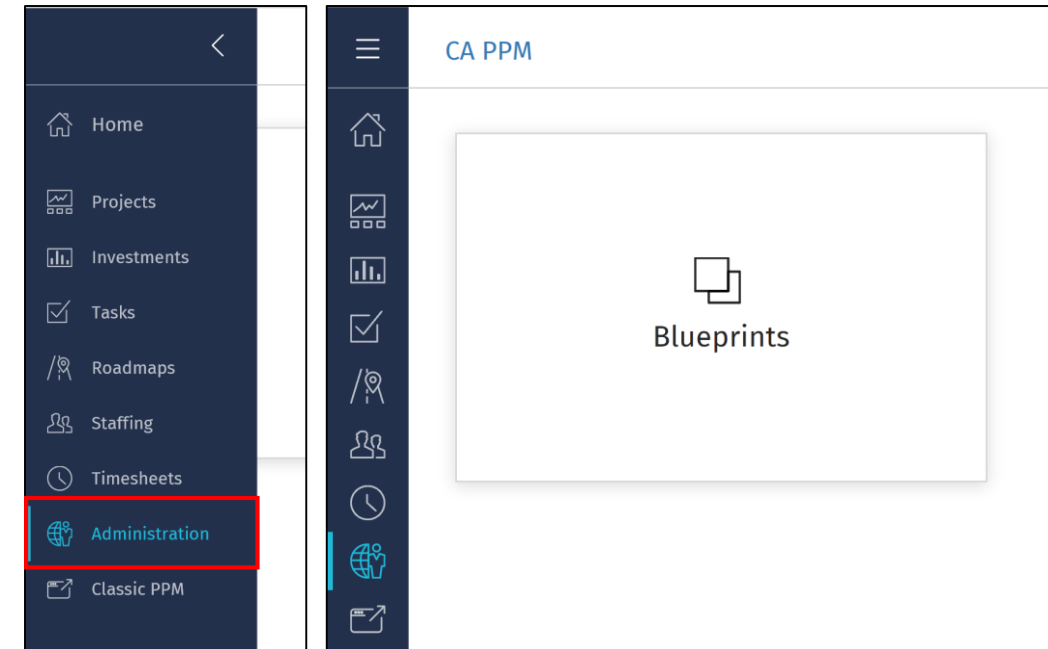
Discuss navigating to, views and configuration of Blueprints



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# Navigation

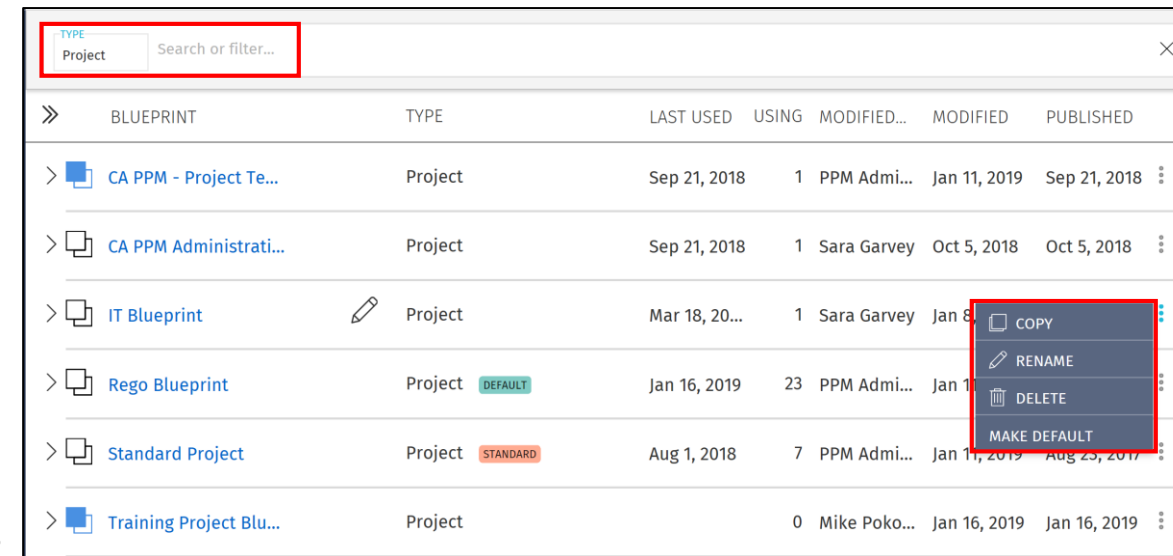
- To have the ability to view and update Blueprints a user requires the following security rights
    - Blueprint – Create Copy, Blueprint - Delete – All, Blueprint – Edit – All, and/or Blueprint – View – All
1. Once in the New User Experience, Click on the 'Administration' Icon
  2. Click on the 'Blueprints' tile
    - Here you will see the list of Blueprints create in the system





# Blueprint List View

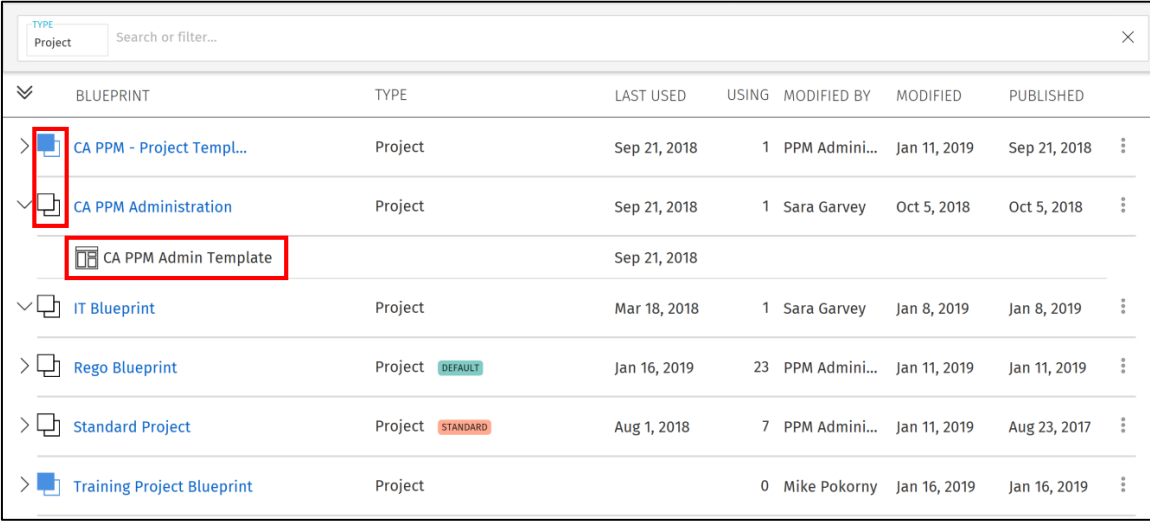
- Here you will see a list of all of the Blueprints that have been created in the system
  - The list is filterable; can filter by Blueprint type (e.g., Idea vs. Project vs. Custom Investments)
- There are multiple options for a Blueprint
  - Copy – Create a new Blueprint which is a one for one copy
  - 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	TYPE	LAST USED	USING	MODIFIED...	MODIFIED	PUBLISHED
> CA PPM - Project Te...	Project	Sep 21, 2018	1	PPM Admi...	Jan 11, 2019	Sep 21, 2018
> CA PPM Administrati...	Project	Sep 21, 2018	1	Sara Garvey	Oct 5, 2018	Oct 5, 2018
> IT Blueprint	Project	Mar 18, 20...	1	Sara Garvey	Jan 8	
> Rego Blueprint	Project	Jan 16, 2019	23	PPM Admi...	Jan 1	
> Standard Project	Project	Aug 1, 2018	7	PPM Admi...	Jan 11, 2019	Aug 23, 2017
> Training Project Blu...	Project		0	Mike Poko...	Jan 16, 2019	Jan 16, 2019

# 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.



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
<div>  CA PPM Admin Template         </div>		Sep 21, 2018				
✓  IT Blueprint	Project	Mar 18, 2018	1	Sara Garvey	Jan 8, 2019	Jan 8, 2019
>  Rego Blueprint	Project	Jan 16, 2019	23	PPM Admini...	Jan 11, 2019	Jan 11, 2019
>  Standard Project	Project	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

# Blueprint List View cont.

- The “Using” column shows the number of projects that are using that Blueprint
  - Pro Tip: to see *which* projects would be impacted by a blueprint change, add the Blueprint attribute to the Project List View

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 <span>DEFAULT</span>	Jan 16, 2019	23	PPM Admini...	Jan 11, 2019	Jan 11, 2019	...		
>  Standard Project	Project <span>STANDARD</span>	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

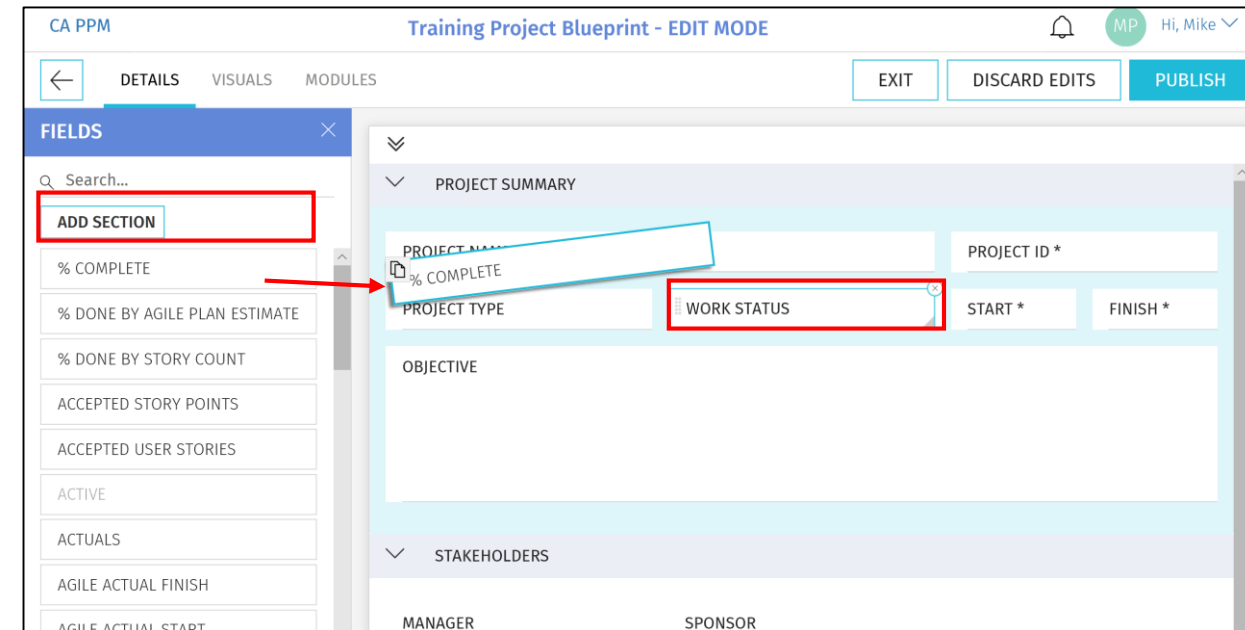
- On Project Blueprints, there are 3 main concepts that can be edited. We will go more in-depth later on these topics.
  - Details – This is the main details or properties page for the Project/Custom Investment Type. Here you can add or remove fields and sections. You can also move and resize fields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

The screenshot displays the 'Training Project Blueprint' interface. The top navigation bar includes 'CA PPM' and 'Training Project Blueprint' tabs. Below the tabs, there are three sub-tabs: 'DETAILS' (selected), 'VISUALS', and 'MODULES'. A red box highlights the 'DETAILS' and 'MODULES' tabs. To the right of these tabs, it says 'Published: Jan 16, 2019' and an 'EDIT' button. The main content area is divided into sections: 'PROJECT SUMMARY' and 'STAKEHOLDERS'. The 'PROJECT SUMMARY' section contains fields for 'PROJECT NAME \*', 'PROJECT ID \*', 'PROJECT TYPE', 'WORK STATUS', 'START \*', and 'FINISH \*'. The 'STAKEHOLDERS' section contains fields for 'MANAGER' and 'SPONSOR'. A sidebar on the left contains various navigation icons.

# Blueprint Configuration



- 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

CA PPM Training Project Blueprint - EDIT MODE

← DETAILS VISUALS MODULES

EXIT DISCARD EDITS PUBLISH

FIELDS

Q Search...

ADD SECTION

% COMPLETE

% DONE BY AGILE PLAN ESTIMATE

% DONE BY STORY COUNT

ACCEPTED STORY POINTS

ACCEPTED USER STORIES

ACTIVE

ACTUALS

AGILE ACTUAL FINISH

AGILE ACTUAL START

PROJECT SUMMARY

PROJECT NAME

PROJECT ID \*

% COMPLETE

PROJECT TYPE

WORK STATUS

START \*

FINISH \*

OBJECTIVE

STAKEHOLDERS

MANAGER

SPONSOR

# 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

Object: Project | Attribute: Previous Status Indicator - *Object Attribute*

**General**

Attribute Name: Previous Status Indicator

Attribute ID: rego\_previous\_status

Description:

Data Type: Lookup - Number

Lookup: Investment Status Indicator

Default:

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:

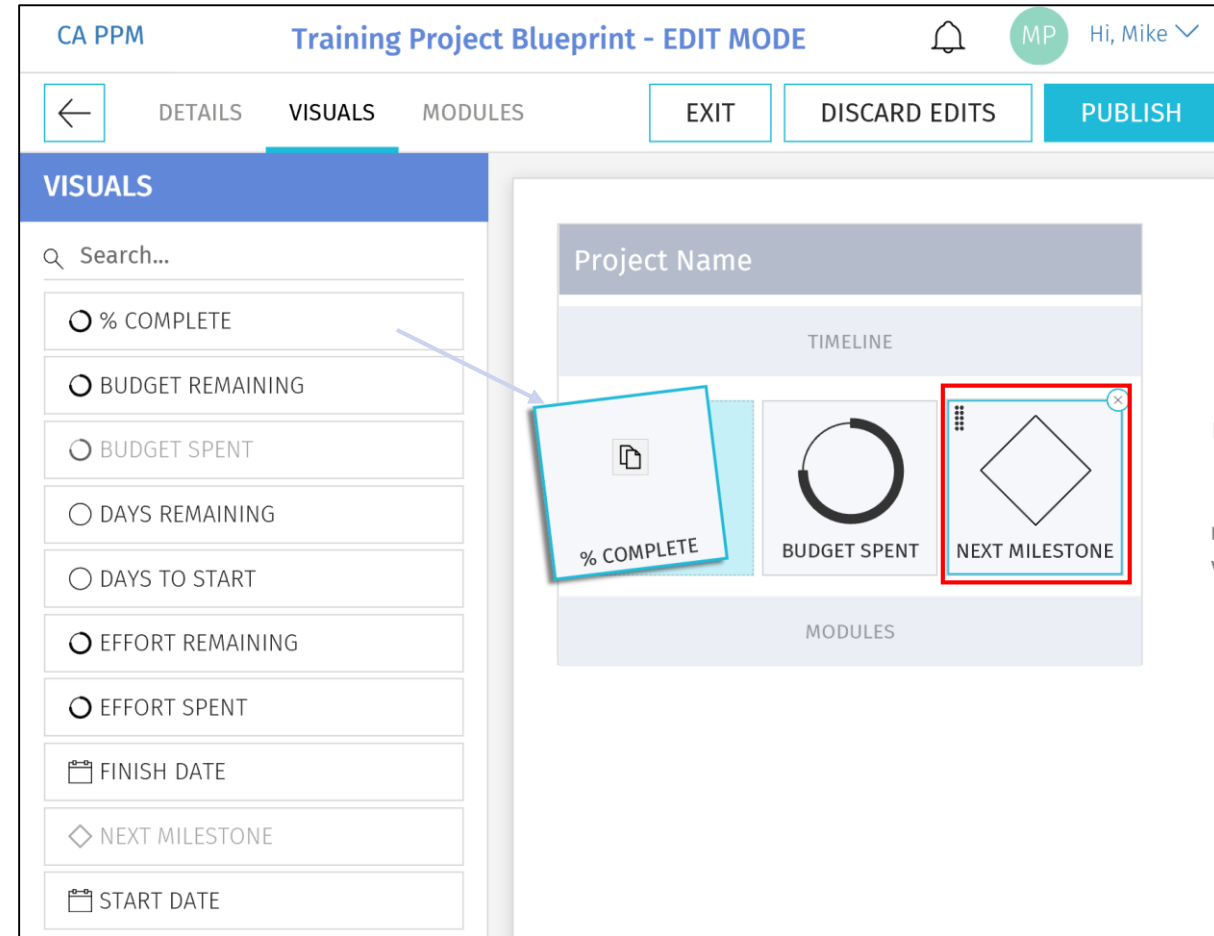
( This is the attribute id used in the REST API. Set this to make the attribute available via the REST API. )

Include in the Data Warehouse: ☒

Include in the Data Warehouse Trending: ☐

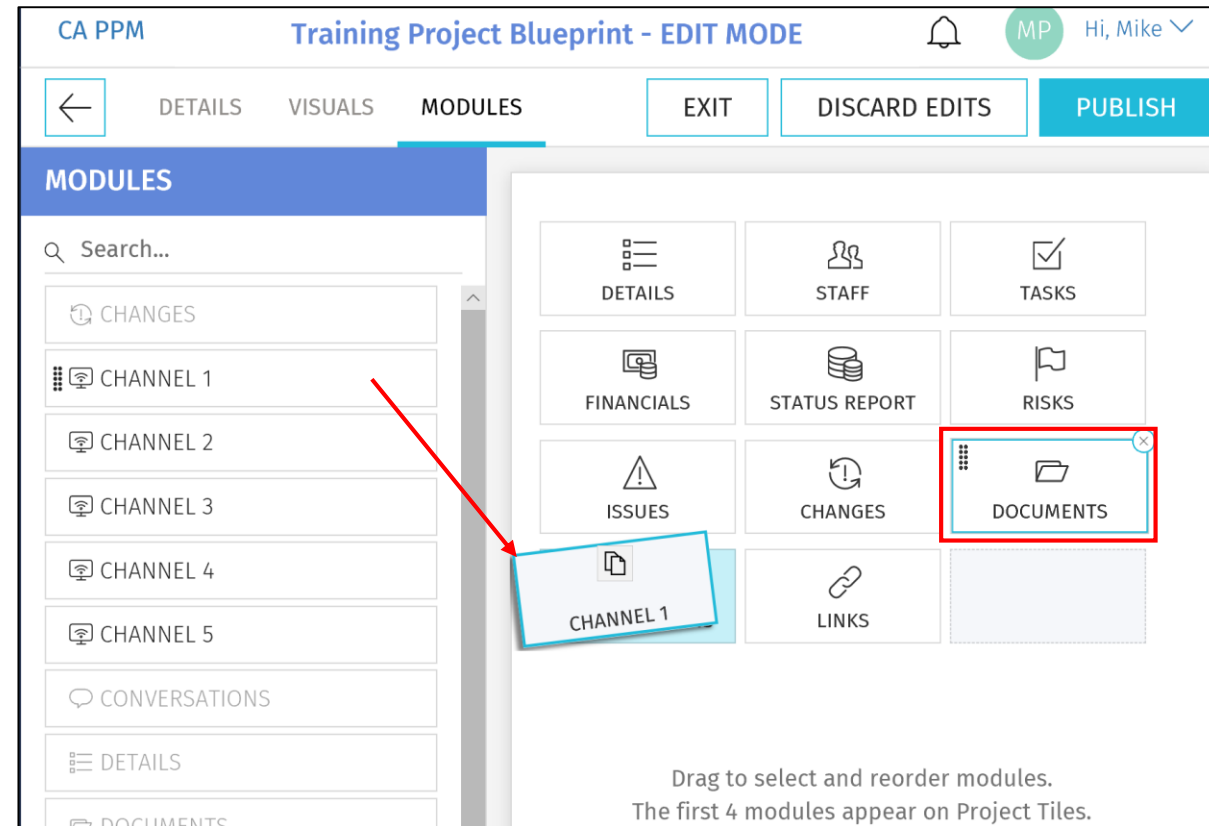
# Visuals (Projects Only)

- 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 5 configurable Channels and the ability to add custom sub-objects





# Modules – Channels (Projects Only)

- 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

The screenshot displays the CA PPM interface for the ACME Project. The top navigation bar includes links for STATUS, STATUS REPORT, SHAREPOINT, CLASSIC PPM, SMARTSHEET (active), POWERBI REPO..., and FIN. The main content area shows a Project Plan for the Smartsheet, with a table of tasks and their details.

Task Name	Duration	Start	Finish	% Complete	Staffing Size	Status	As
Initiation	14d	12/28/15	01/14/16	100%			
Detailed Requirer	6d	12/28/15	01/04/16	100%	4	Green	Mike
Hardware Requir	5d	01/05/16	01/11/16	100%	4	Blue	Ed
Final Resource P	2d	01/12/16	01/13/16	100%	2	Yellow	Ba
Staffing	1d	01/14/16	01/14/16	100%	1	Yellow	Ed

Below the Smartsheet, the Training Project Blueprint - EDIT MODE modal is open, showing a list of modules and a configuration window for the Smartsheet channel.

**Training Project Blueprint - EDIT MODE**

Navigation: DETAILS VISUALS MODULES (selected)

Buttons: EXIT DISCARD EDITS PUBLISH

**MODULES**

Search: Search...

Available Modules:

- CHANGES
- CHANNEL 1
- CHANNEL 2
- CHANNEL 3
- CHANNEL 4
- CHANNEL 5
- CONVERSATIONS
- DETAILS
- DOCUMENTS
- FINANCIALS
- ISSUES

**Configure - Smartsheet**

CHANNEL NAME \*  
Smartsheet [PREVIEW]

CHANNEL URL \*  
<https://app.smartsheet.com/b/publish?EQBCT=xxxxxxxxxxxx>

REFERRER URLS  
Comma Separated

# 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

The screenshot displays the configuration interface for a custom sub-object. The top section, titled 'Subobject', includes a 'Master Object' dropdown set to 'Project' and several checkboxes: 'Event Enabled', 'Include in the Data Warehouse', 'Copy Enabled', 'Export Enabled', 'View All Enabled', and 'API Enabled'. The 'API Enabled' checkbox is checked and highlighted with a red box, with a note below it stating '(Once the value is enabled, it cannot be disabled.)'. Below this are 'Save' and 'Save And Return' buttons. The bottom section, titled 'Object: Test Sub Object - Properties', shows fields for 'Object Name' (Test Sub Object), 'Object ID' (test\_sub\_prj\_obj), 'API Attribute ID' (custTestSubPrjObjs, highlighted with a red box), and 'Content Source'. To the right, a grid of module icons is shown, with 'TEST SUB OBJECT' highlighted in a red box at the bottom left.

# 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  Description

<input type="checkbox"/>	Access Right ▲	Description
<input type="checkbox"/>	Blueprint - Create Copy	Allows user to create a copy of an existing Blueprint. Includes Blueprint - View - All right.
<input type="checkbox"/>	Blueprint - Delete - All	Allows user to delete all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
<input type="checkbox"/>	Blueprint - Edit - All	Allows user to edit all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
<input type="checkbox"/>	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.

Blueprint

Name

ID

	Name ▲	ID	Created Date
<input type="radio"/>	ADMIN TEST	BP1020	3/25/18
<input type="radio"/>	JRF test BluePrint	BP1015	1/1/18
<input type="radio"/>	Standard Project	BP1000	9/18/17
<input type="radio"/>	Standard Project - Custom	BP1002	9/21/17

Displaying 1 - 4 of 4

Project: Agile Time Tracking Template - Properties - Main - Settings  Scenario: [--Select--]

Setting

Execute Spawn Estimation Process ☐

Department

Location

Blueprint

Template ☒ (Project must not have time entries or be financially enabled to be marked as a template.)

# 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

1

Custom Script Custom Script Parameters

Process: Blueprint Migrate | Step: Start - Custom Script

sourceHost

sourceUser

sourcePass

sourceBlueprintCodes

blueprintSetStatus

isDebug

ignoreVisualErrors

2

Action Items Tasks Processes Notifications

Organizer: Available Processes

Process Name

Primary Object

Partition

Status

	Process
<input checked="" type="checkbox"/>	BluePrint Migrate

3

CA PPM

» BLUEPRINT

>

>



# Part III:

# Blueprint Demonstration

Demo Blueprint creation / usage while discussing Rego Blueprint Best Practices



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# Part IV: Blueprint Best Practices



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# Best Practices

- Spend time planning your Blueprint strategy before implementing – don't just mimic your Classic screens in the New UX. You can have several blueprints that will allow one projects to have many different views depending on part of the organization to which they belong, Phase they're in, etc. You may need blueprints by BU or project type.
- Remember to API-enable any attributes you want to utilize in the New UX.
- Document any end user-configurations that will be required. For example, if you only want users to utilize certain portions of the status report, instruct them on how to turn on and off the necessary sections. If you want certain fields to appear in the Risks and Issues list, document the configurations they should make to their own screens.
- Use channels if you need to access Project functionality that is not yet available in the New UX.
- Ensure you have common fields where you want Enterprise visibility
- You can create a process (manual or automated) to change blueprints over the course of the lifecycle

# 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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