



*rego*University 2019

SAN DIEGO

# Creating Channels and Links

Your Guides: Ben Rimmasch and Luis Palacios

# Introductions

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



# Agenda

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- Introduction
- Creating a Channel
- Advanced Functionality
- 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...

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> **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

## 5

5

# Part 2: Creating a Channel

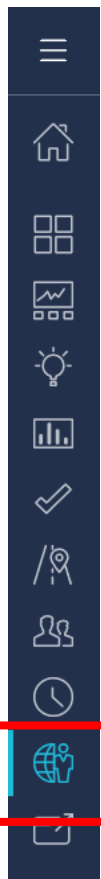


Let Rego be your guide.






# Creating a Channel

8

## 1. Go into the New UI



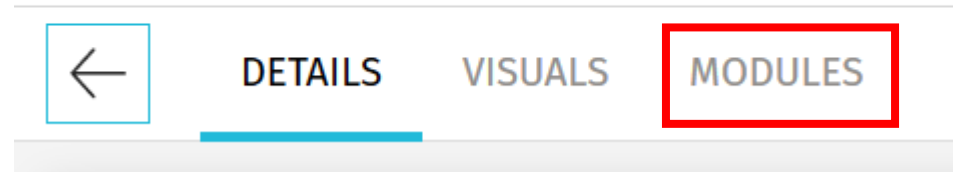
## 2. Select Administration

| >> BLUEPRINT   |                           | TYPE   |
|--|---------------------------|--|
| >    | IT Blueprint              | Project  |
| >    | Name of the Client        | Project  |
|      | New UX Idea               | New UX Idea <span>DEFAULT</span> <span>STANDARD</span>       |
|      | Patrick Custom Investment | Custom Investment <span>DEFAULT</span> <span>STANDARD</span> |
| >  | Rego Blueprint            | Project <span>DEFAULT</span>                                 |

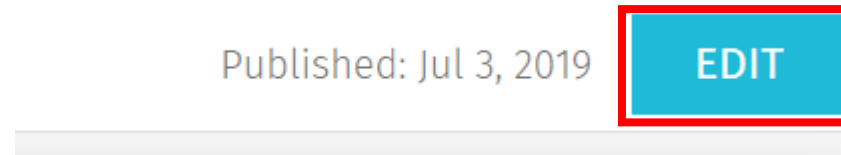
## 3. Select Desired Blueprint

# Creating a Channel cont.

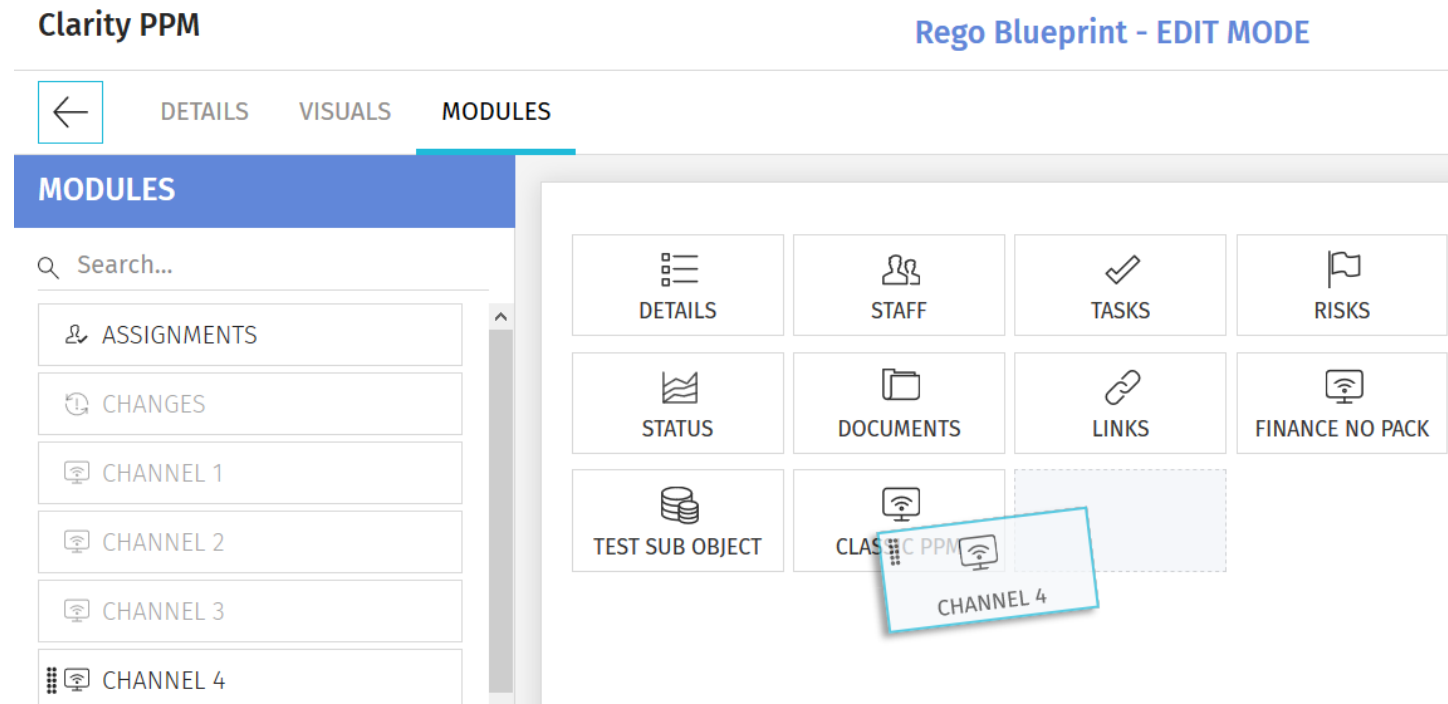
4. Select Modules



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.

## Example Result

Clarity PPM

Application Monitoring  
PR000037

NEEDS HELP

PA Hi, PPM

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

Classic Clarity PPM

PA Hi, PPM Administrator

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 |       |        |      |       |           |
| mzp-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           |

# Part 3: Creating a Channel to Project



Let Rego be your guide.

# 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)

# 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](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](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

Application Monitoring  
PR000037

NEEDS HELP

🔔

PA Hi, PPM

<

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

🔑 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

# Part 4: 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  
./.././.././../nu#action:projmgr.projectProperties&odf\_view=projectSchedule&id=\$...

REFERRER URLS

# Sample: Rego Channel Pack

Clarity PPM

Application Monitoring  
PR000037

NEEDS HELP

PA Hi, PPM

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

|                          | 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?



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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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