

The background of the slide is a scenic photograph of two hikers walking away on a rocky mountain trail. To the left, a small blue lake is nestled in a valley. The sky is blue with some clouds. In the top left corner, there is a semi-transparent geometric overlay consisting of white and light blue faceted shapes.

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Configuration/Administration in the New UX

Your Guide: Rob Ensinger

Introductions

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



Open Mic

- How many people using Modern UX now?
- What is keeping you from rolling out?
- What features do you consider valuable for your organization?

Some Rego Thoughts on the Modern UX

What is Success

- Easier Access to end user functions
- Very Configurable in Staffing and Project Management Areas
- Adding collaboration functions to staffing and project/task management
- Timesheets shown in Kanban style, easier to review and approve by RM

Stumbling Blocks

- Need to train end user effectively
- Role Replacement process is modified
- Business users are not in CA PPM
- Limitations in Modern UX that don't exist in Classic View

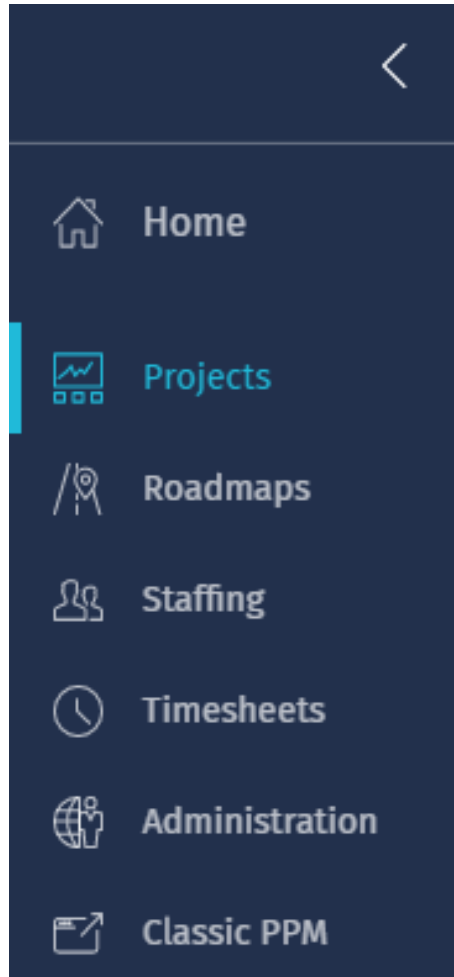
15.4

| Modern UX

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15.4 Overall UI

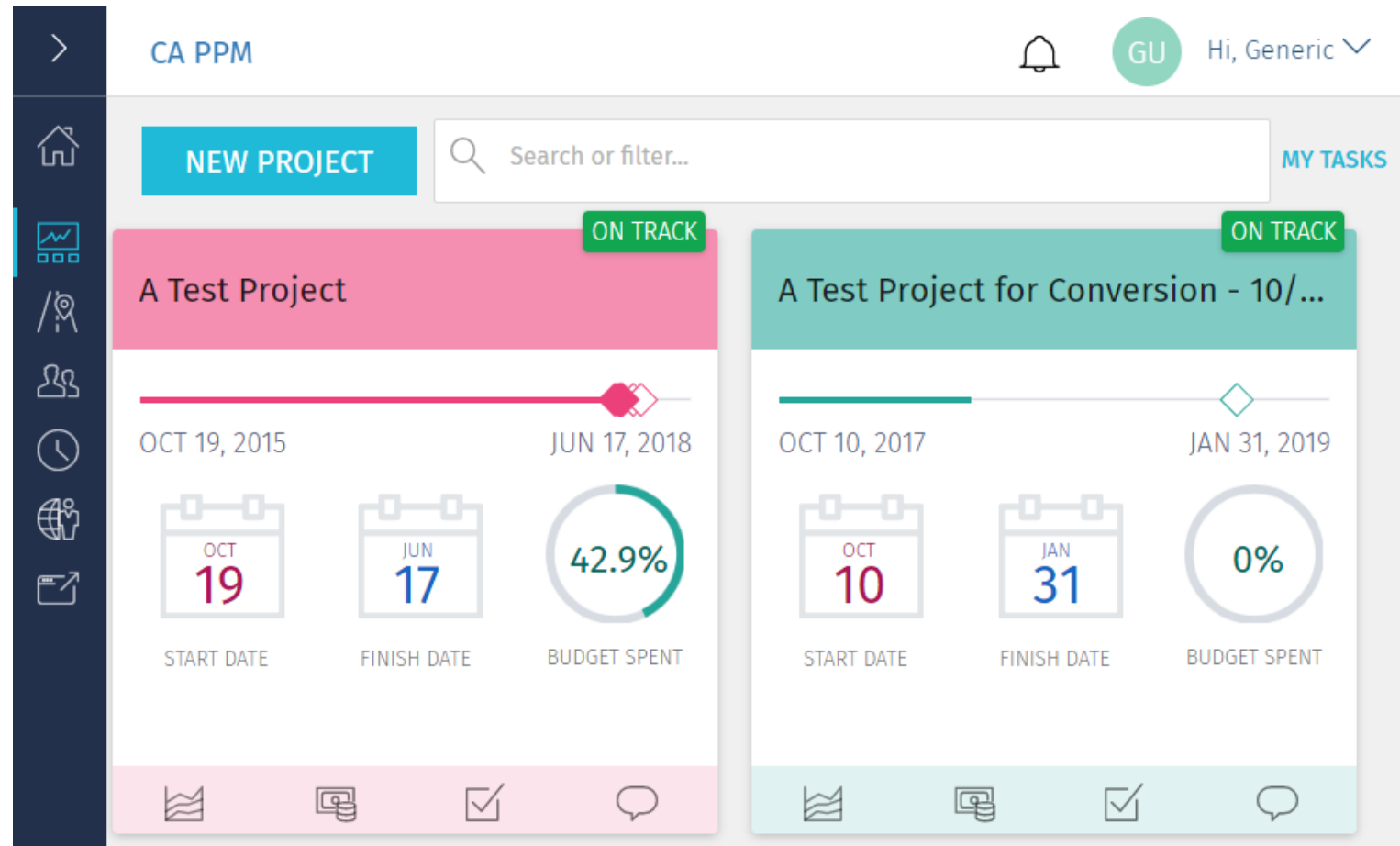


- Home- Displays Project Tiles
- Project-Displays Project Tiles
- Roadmaps-Displays Roadmap View
- Staffing-Displays Investment/Resource View & Requests View
- Timesheets- Timesheet View
- Administration-To manage Blueprints
- Classic PPM- Link to Classic View

15.4 Overall UI

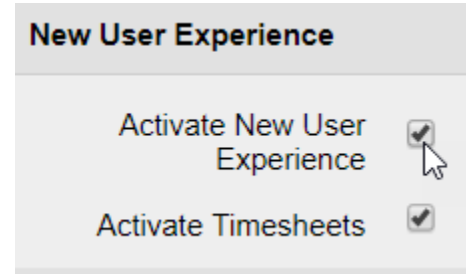
The Modern UX is not yet as configurable as Classic UI

- There are areas of personalization- that allow the user to view data based on their preferences
- Many areas that allow personalization can't be published as default views



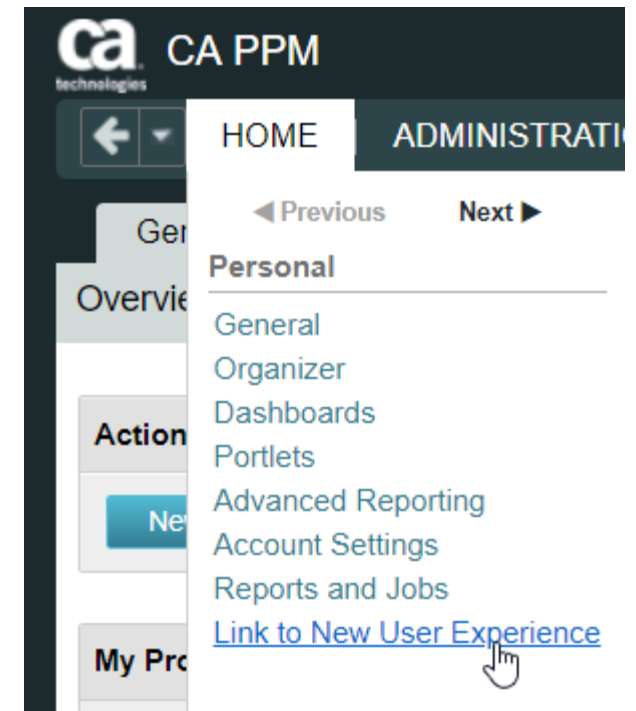
15.4 UI - Enabling

- In Classic PPM → Administration → System Options, Enable New User Experience & Activate Timesheets.



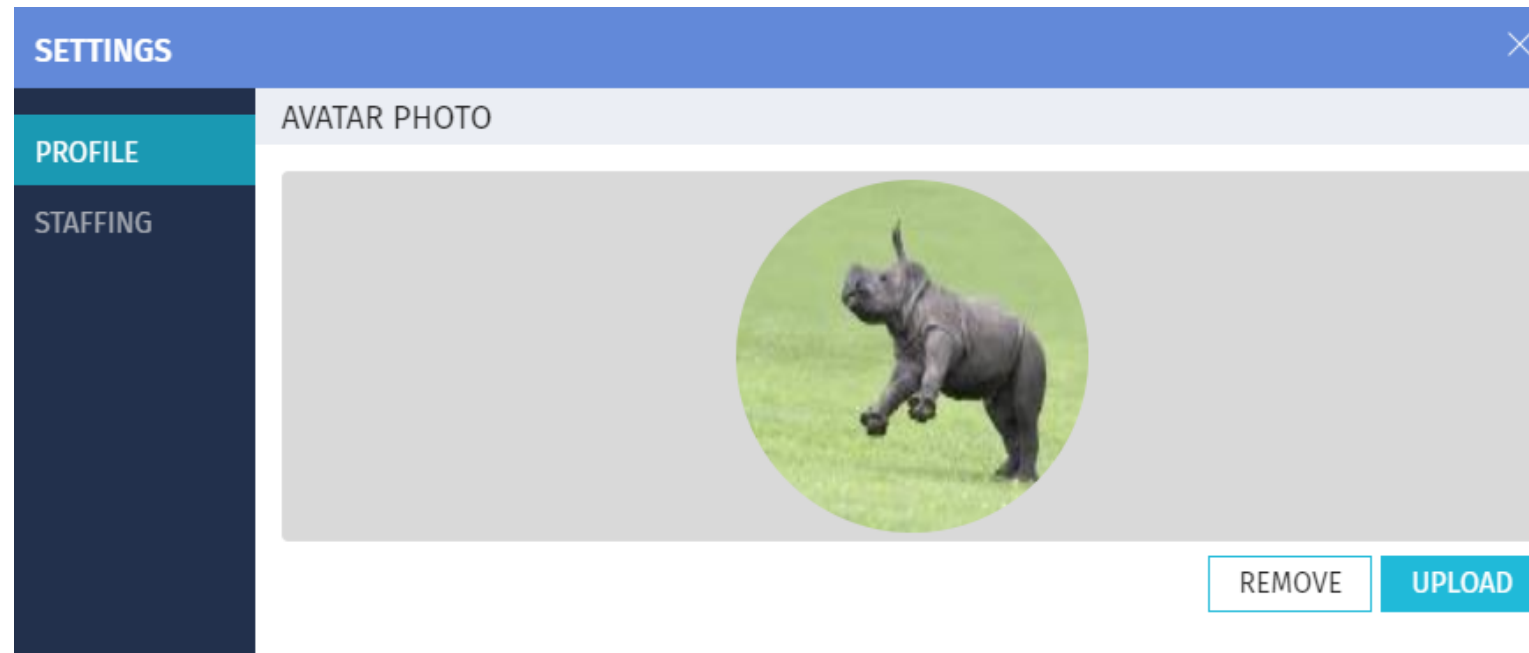
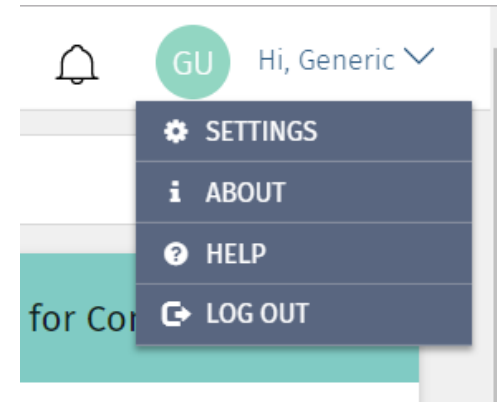
- Once enabled, create a menu link in Classic PPM to the Modern UX following the instructions found in the CA online documentation:

[Getting Started with the CA PPM New User Experience.](#)



15.4 UI Settings - Profile

- In the Settings Under Profile each user can provide an avatar photo that will be shown on assignments and collaboration areas of the tool.
- Suggested: Use a Baby Rhino



15.4 UI - Filters

Filters in the Modern UX are 'sticky' and remain until cache is cleared

Filters therefore 'remember' last filtered used each time the page loads

15.4 has more filter options than were available in 15.3

The screenshot displays a project management dashboard for 'CA PPM'. At the top, there is a navigation bar with a home icon, a search bar containing 'Search or filter...', and a user profile 'GU Hi, Generic'. Below the search bar, a row of filter buttons is visible: 'PROJECT MANAGER', 'TEAM MEMBER', 'PROJECT OBS', 'PROJECT TYPE', 'WORK STATUS', and 'ACTIVE STATUS'. The main content area features two project cards. The first card, 'A Test Project', has a pink header and shows a progress bar at 42.9% with a red diamond marker. It lists a start date of 'OCT 19, 2015' and a finish date of 'JUN 17, 2018'. The second card, 'A Test Project for Conversion - 10/...', has a teal header and shows a progress bar at 0% with a white diamond marker. It lists a start date of 'OCT 10, 2017' and a finish date of 'JAN 31, 2019'. Both cards include icons for a calendar, a checklist, and a chat bubble. A dark blue sidebar on the left contains icons for home, dashboard, location, users, clock, globe, and document.

Administration/Configuration | Blue Prints

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Blueprint Rights

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

Add the appropriate Blueprint rights to the administration group in the Classic UI administration area.

Blueprints

Blueprint Configuration

As an application owner or content administrator, configure blueprints to determine what project properties appear for each Blueprint type.

Blueprints usually represent a specific business unit such as the Marketing or the IT business unit.

Create custom blueprints by copying the Standard Project blueprint or any other user-defined blueprint

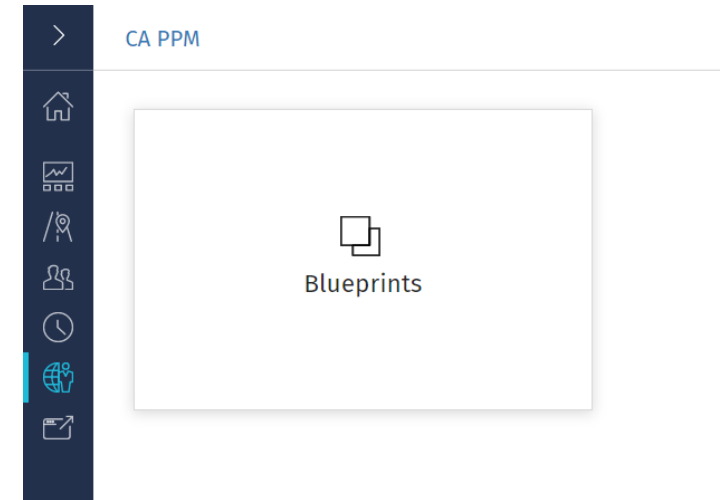
Designate a default blueprint so that if you have not configured a blueprint, the system can use the attributes and section layout from the default blueprint.





Associate project templates to blueprints

- Edit a user-defined blueprint to change the layout details
- Publish the configured blueprint to make the changes available to templates and projects

The following attribute data types are not available for blueprint configuration:

- URL
- Attachment
- Custom time-scaled value (TSV)



>>	BUEPRINT	LAST US...	PROJEC...	MODIFIE...	MODIFIE...	PUBLIS...	
>	 ADMIN TEST		0	Generic...	Mar 25, ...	Mar 25, ...	⋮
>	 JRF test BluePrint	Jan 1, 2...	1	Jon Fre...	Jan 1, 2...	Jan 1, 2...	⋮
>	 Standard Project	Feb 22, ...	20	Jon Fre...	Jan 1, 2...	Sep 18, ...	⋮
>	 Standard Project -... DEFAULT	Feb 16, ...	471	Jon Fre...	Jan 1, 2...	Jan 1, 2...	⋮

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.)

Blueprint Definition

Blueprints allow management of three areas in the New User Experience Project Area:

- Details
- Visuals
- Modules

The screenshot displays the 'ADMIN TEST - EDIT MODE' interface for 'CA PPM'. The top navigation bar includes a back arrow, 'DETAILS', 'VISUALS', and 'MODULES' tabs. The 'DETAILS' tab is active, and a 'FIELDS' panel is open on the left, showing a search bar and a list of fields: '% COMPLETE', '% DONE BY AGILE PLAN ESTIMA...', '% DONE BY STORY COUNT', 'ACCEPTED STORY POINTS', 'ACCEPTED USER STORIES', 'ACTIVE', 'ACTUALS', and 'AGILE ACTUAL FINISH'. On the right, a 'PROJECT SUMMARY' panel is open, showing a list of fields: 'PROJECT NAME *', 'PROJECT ID *', 'START *', 'FINISH *', 'PROJECT TYPE', 'WORK STATUS', and 'OBJECTIVE'. The top right corner shows a notification bell, a user profile 'GU', and the text 'Hi, Generic'. The bottom right corner features the 'regoUniversity 2018' logo.

Blueprints – Managing Details

The area of project details is the most configurable part of Blueprints.

Each Blueprint can have its own sections and customized selection of project attributes.

The screenshot displays the 'ADMIN TEST - EDIT MODE' interface. At the top, the breadcrumb navigation shows 'CA PPM' and 'ADMIN TEST - EDIT MODE'. The user is logged in as 'Hi, Generic'. The main navigation tabs are 'DETAILS', 'VISUALS', and 'MODULES', with 'DETAILS' being the active tab. A 'FIELDS' configuration panel is open, showing a search bar and an 'ADD SECTION' button. Below this, several project attributes are listed in a scrollable list: '% COMPLETE', '% DONE BY AGILE PLAN ESTIMA...', '% DONE BY STORY COUNT', 'ACCEPTED STORY POINTS', and 'ACCEPTED USER STORIES'. To the right, the 'PROJECT SUMMARY' form is visible, containing fields for 'PROJECT NAME *', 'PROJECT ID *', 'START *', and 'FINISH *'. At the top of the form, there are three buttons: 'EXIT', 'DISCARD EDITS', and 'PUBLISH'.

Blueprints – Managing Details

In order for custom attributes to show up in the Details Selection List make sure you have populated the API Attribute ID.

The following attribute data types are not available for blueprint configuration:

- URL
- Attachment
- Custom time-scaled value (TSV)
-

The screenshot shows a configuration form for a blueprint attribute. The fields and their values are as follows:

- Attribute Name:** Business Units Impacted
- Attribute ID:** bu_impacted
- Description:** (Empty text box)
- Data Type:** Multi Valued Lookup - String
- Lookup:** Impacted BUs
- Default:** (Empty dropdown menu)
- 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:** prjbuimpacted (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:**

Blueprints – Managing Visuals

The Visuals section in Blueprints controls 3 project attributes that are most visible in the project tiles

Currently there are only 9 available attributes.

The screenshot shows a user interface for managing project visuals. At the top, there are three tabs: 'DETAILS', 'VISUALS' (which is selected and highlighted in blue), and 'MODULES'. Below the tabs, there are three buttons: 'EXIT', 'DISCARD EDITS', and 'PUBLISH'. The main area is divided into two sections. The left section, titled 'VISUALS', contains a search bar and a list of nine attributes, each with a radio button: 'BUDGET REMAINING', 'BUDGET SPENT', 'DAYS REMAINING', 'DAYS TO START', 'EFFORT REMAINING', 'EFFORT SPENT', 'FINISH DATE', 'NEXT MILESTONE', and 'START DATE'. The right section, titled 'Project Name', contains a 'TIMELINE' section with three visual tiles: 'START DATE' (calendar icon), 'FINISH DATE' (calendar icon), and 'BUDGET SPENT' (circular progress icon). Below the timeline is a 'MODULES' section.

Blueprints – Managing Modules

The Module selection controls what areas are linked from the project tile.

Only the first 4 will display on the project tiles.

Risks/Issues/Changes are new in 15.4 you can add all three or just the modules in use by your project managers.

Press the PUBLISH button save changes and push out to the existing projects using the Blueprint

The screenshot shows a user interface for managing project modules. At the top, there are navigation tabs: 'DETAILS', 'VISUALS', and 'MODULES'. Below these is a 'MODULES' header bar. A search bar is present with the text 'Search...'. A list of modules is displayed, each with an icon and a label: CHANGES, CONVERSATIONS, DETAILS, DOCUMENTS, FINANCIALS, ISSUES, LINKS, RISKS, STATUS, and TASKS. To the right of this list is a drag-and-drop area containing a grid of module tiles. The tiles are arranged in two columns and three rows. The first four tiles are: STATUS, FINANCIALS, TASKS, and CONVERSATIONS. The fifth tile is DETAILS, and the sixth is LINKS. There is a dashed box below the tiles, indicating a drop zone. At the bottom of the drag-and-drop area, there is a text instruction: 'Drag to select and reorder modules. The first 4 modules appear on Project Tiles.' Above the drag-and-drop area are three buttons: 'EXIT', 'DISCARD EDITS', and 'PUBLISH'.

Other Customization | Personalization

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Roadmap Pick List

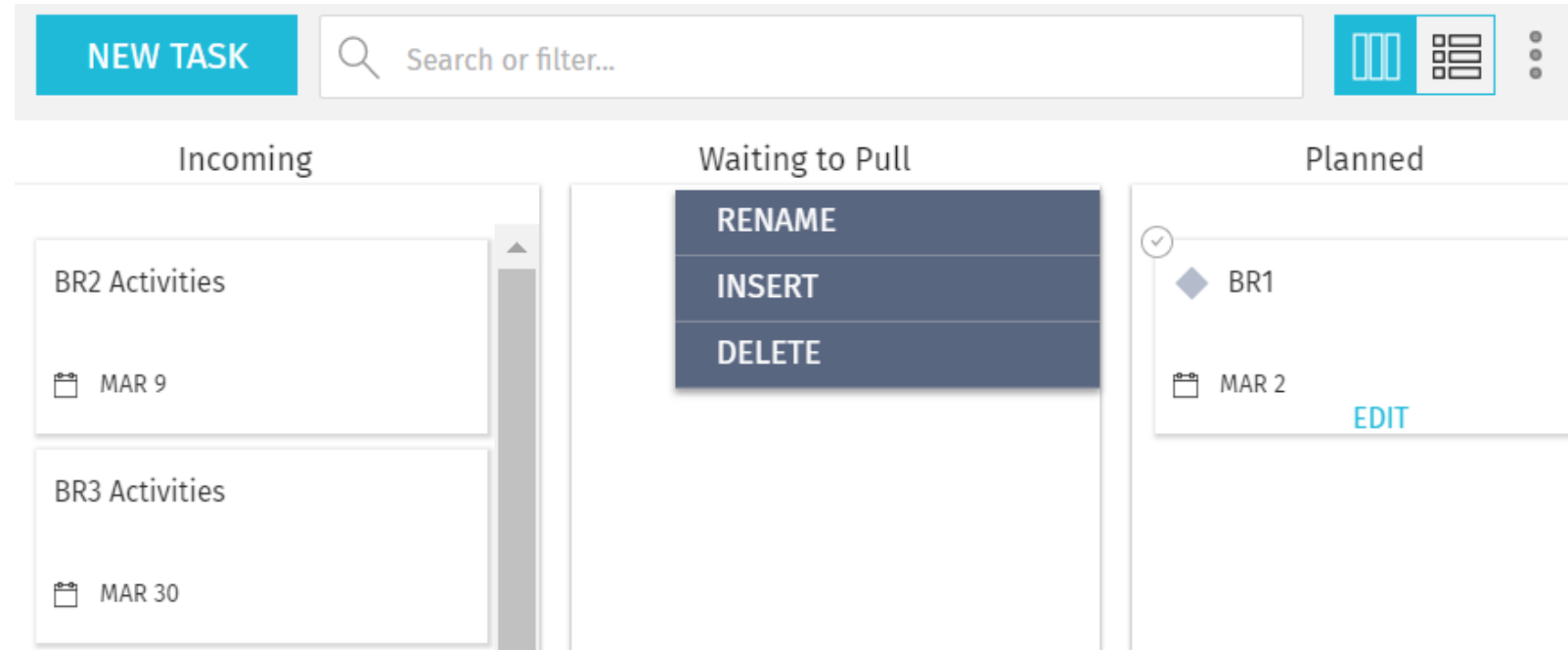
Roadmap Board view can have personalized views. These views can be shared.

The screenshot displays a software interface for a Roadmap Board. At the top, there is a navigation bar with a back arrow, a refresh icon, a stack icon, a search bar labeled 'Search or filter...', and view controls. The view is currently set to 'DELIVERY VIEW'. Below the navigation bar, the board is divided into columns. The 'Planning' column is visible on the left, containing two items: 'OCM Plan For Program' (dated MAR 8) and 'CA PPM Functional Roadmap' (dated MAR 19, marked 'MUST HAVE'). A picklist menu is open over the 'Planning' column, titled 'COLUMNS *'. The menu lists several options: 'Planning' (selected), 'MANAGE', 'NEW PICKLIST', 'This Roadmap', 'All Roadmaps', 'In Plan', 'Status', and 'Type'.

Task Board View

Task Board view can have personalized columns, these can't be shared.

Any new task will be slotted in the INCOMING column- this cannot be edited.




Staffing View

The Staffing view has no administrative access to modify the primary views.

Personalization is available in 4 places:

- Full Screen toggle for Resources/Investments
- Hours/FTE toggle
- Forecast toggle
- Number of periods

Current Time Period →  Hours Forecast

Resources Investments

	Mar 1, 2018-Ma...	Apr 1, 2018-Apr...	May 1, 2018-M...	Jun 1, 2018-Jun...	TOTALS
	HOURS	HOURS	HOURS	HOURS	HOURS
× PINNED (0) ALL	6,863.18	6,022.98	6,611.46	5,922.26	64,290.14
> A Crawford	0	0	0	0	0
> A Eckenrod	0	0	0	0	0
> A Garcia	0	0	0	0	0
> A Haro	0	0	0	0	0
> A Leon	0	0	0	0	0
> A Marchbanks	0	0	0	0	0
> A McElyea	0	0	0	0	0
> A Riesgo	0	0	0	0	0
> A Valenzuela	0	0	0	0	0
> A Weiner	0	0	0	0	0

FIRST PREVIOUS 1 - 200 of 273 NEXT LAST

Requests

	Mar 1, 2018-Ma...	Apr 1, 2018-Apr...	May 1, 2018-M...	Jun 1, 2018-Jun...	TOTALS
	HOURS	HOURS	HOURS	HOURS	HOURS
	14,111.65	12,544.15	13,781.31	12,407.48	133,140.76
> Administrator	176.00	168.00	184.00	168.00	1,576.00

Staffing View- Settings

The end user can personalize the Staffing views and restore defaults

- Start Period
- Time Period Span
 - You can set this to display multiple time scale views
 - Time Periods are based on Fiscal Time Period Settings
- Allocation Thresholds
 - Over % Color
 - Under % Color

SETTINGS

PROFILE

STAFFING

START PERIOD: [Current Time 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: [Monthly](#)

2: [Quarterly](#)

3: [Annual](#)

4: [Optional](#)

UNIT OF MEASURE:
 FTE Hours

DECIMAL DISPLAY:
 0.00 0.0 .

CURRENCY:
\$USD

ALLOCATION THRESHOLD:
The Resources to Investments view determines the telescope gradient colors based on alloc the gradient scale to indicate resources that need your attention over any time period. Hove threshold range.

HEAT MAP:

UNDER: OVER:

100%

Timesheets View

The timesheet view in the Modern UX is still controlled by Timesheet Options in the Administration section of the Classic UI.

Note: After modifying System Options to Activate Timesheets

Make sure to check/re-publish Timesheet Options.

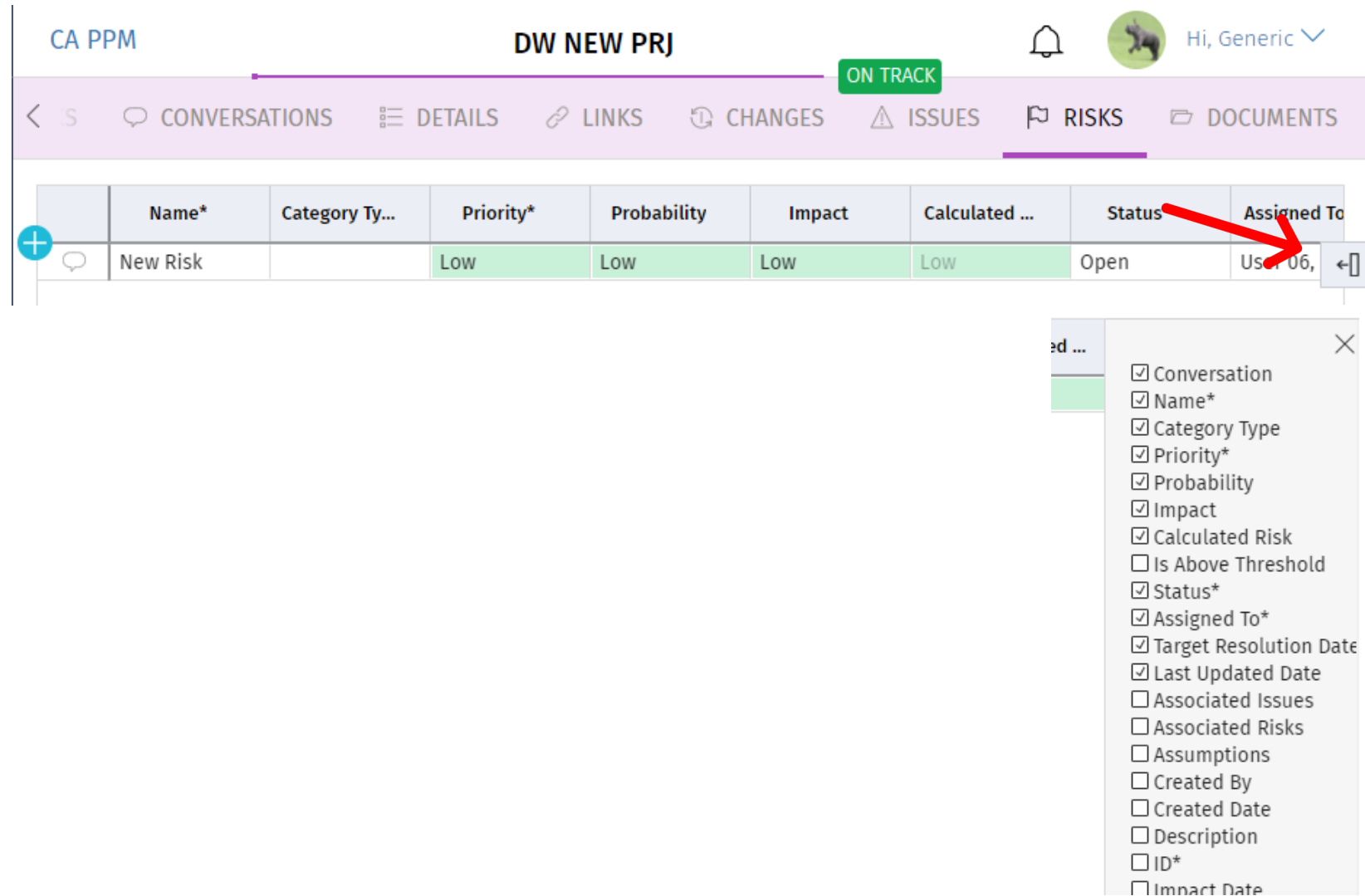
The screenshot shows the 'Timesheet Options' configuration panel in the top left, titled 'Default Content and Layout'. It features two columns: 'Available Columns' and 'Selected Columns'. The 'Available Columns' list includes: Input Type Code, Charge Code, ETC, Investment ID, Phase, User Value 1, and User Value 2. The 'Selected Columns' list includes: Investment, Description, Daily Actuals, and Total. Below these lists, it states 'Required Options: Description.' and an 'Apply' button.

The main interface below shows navigation tabs: 'CA PPM', 'MY TIMESHEET' (active), and 'REVIEW & APPROVE'. A user profile 'GU Hi, Generic' is visible. The view is set to 'Mar 26 - Apr 1' with 'HOURS' at 0.00/40.00 and 'PROJECT TIME' at 0%. A 'SUBMIT' button is present. Below this is a weekly grid with columns for 'Mon. 26', 'Tue. 27', 'Wed. 28', 'Thu. 29', 'Fri. 30', 'Sat. 31', 'Sun. 1', and 'Total'. A project entry 'Demo Project For Jen (PR000343)' is expanded, showing rows for 'Business Case' and 'Development'.

Risk/Issue/Change Request View

The Risk/Issue/Change Views are new to 15.4 and have one nice personalization—click on the edit rows icon and you can select which rows display in the view.

Items with a * are required in the classic view—however only the NAME field is actually required in this view.



	Name*	Category Ty...	Priority*	Probability	Impact	Calculated ...	Status	Assigned To
	New Risk		Low	Low	Low	Low	Open	User 06, ←

- Conversation
- Name*
- Category Type
- Priority*
- Probability
- Impact
- Calculated Risk
- Is Above Threshold
- Status*
- Assigned To*
- Target Resolution Date
- Last Updated Date
- Associated Issues
- Associated Risks
- Assumptions
- Created By
- Created Date
- Description
- ID*
- Inmart Date

Financial View

Financial Column Grouping—

Make sure to take advantage of grouping function in Financial Views.

Simply Drag the column to the top of the sheet to create a grouping

CA PPM Downtown Links: 6th Ave to Broadway

STATUS FINANCIALS TASKS CONVERSATIONS DETAILS LINKS

TEST PLAN OF RECORD

Charge Code X

Charge Code* ↑	Cost Type*	Transactio...	Departmen...	Resource*	Resource C...	Role*	SEP 1, 2015-SEP ...	OCT 1, 2015-OCT...
							PLANNED	PLANNED
							262	262
> Capital							24	24
> Expense							40	40
> Holiday							38	38
> Meals							36	36
> Operating							37	37
▼ Sick Time							62	62
	Operating	Internal Labor	Corp	XC Administra...	Cost	Administrator	39	39
	Operating	Internal Labor	Corp	Rego Admin	Cost	Administrator	23	23
> Travel							25	25

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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