regoUniversity 2018

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

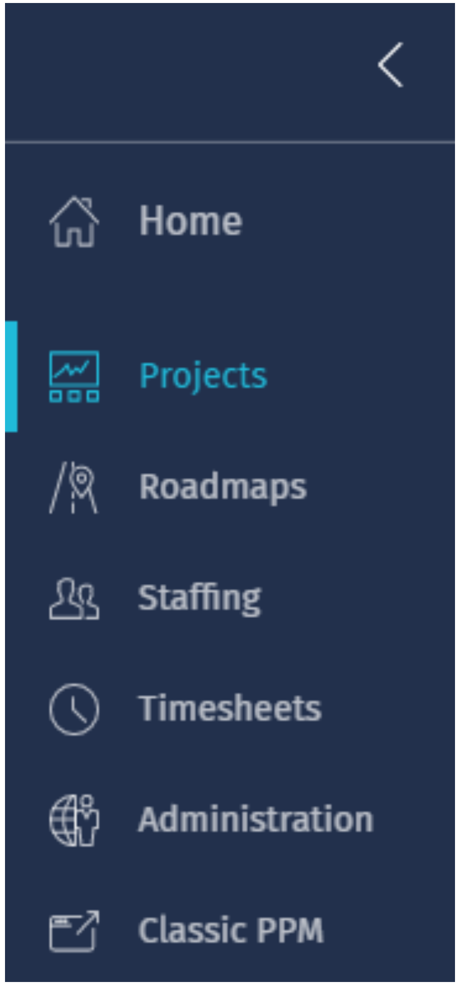
- Need to train end user effectively
- Role Replacement process is modified
- Business users are not in CA PPM
- Limitations in Modern UX that don’t exist in Classic View

15.4
| Modern UX

regoUniversity 2018

Let Rego be your guide.

15.4 Overall UI

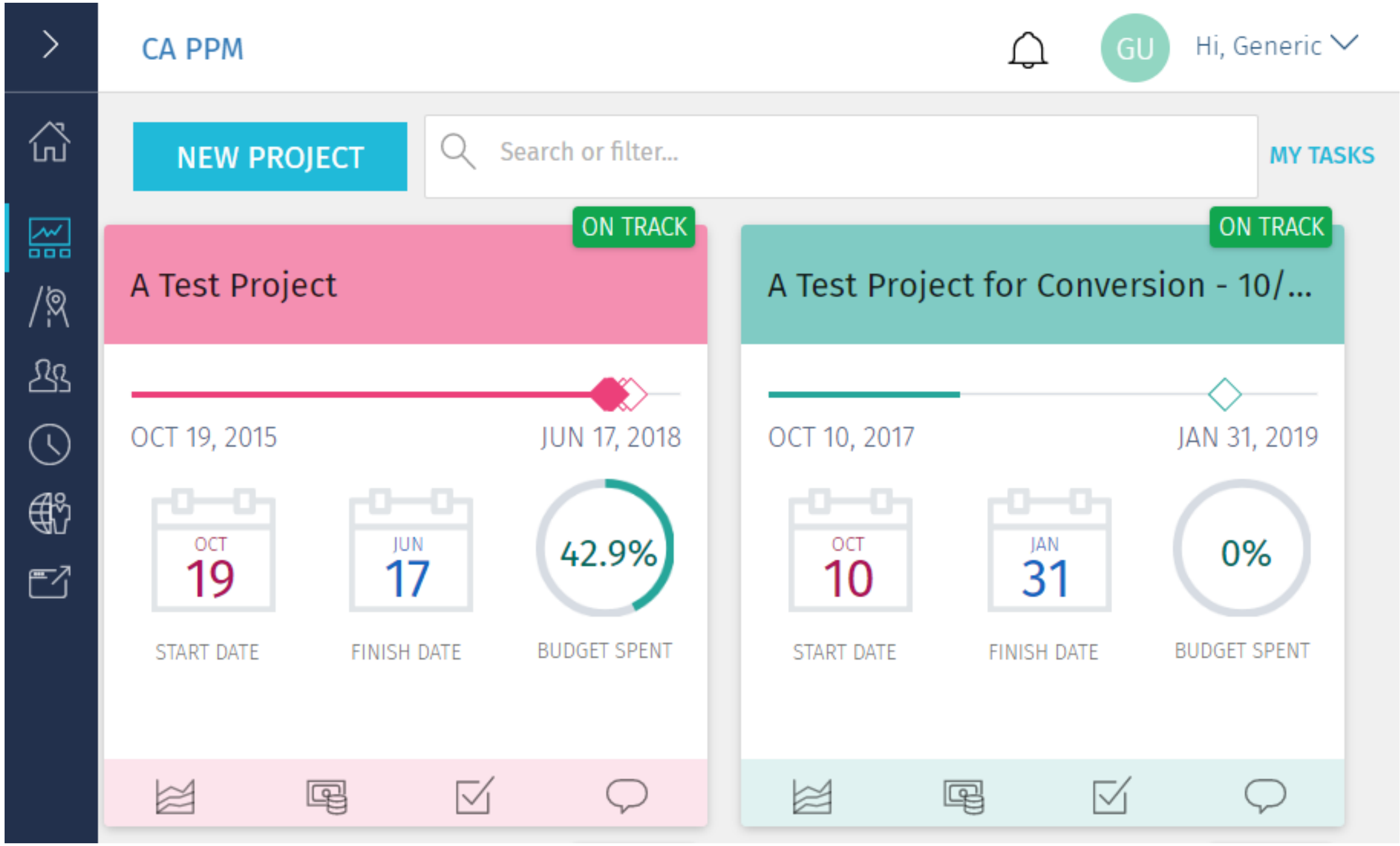


- Home- Displays Project Tiles
- Project-Displays Project Tiles
- Roadmaps-Displays Roadmap View
- Staffing-Displays Investment/Resource View & Requests View
- Timesheets- Timesheet View
- Administration-To manage Blueprints
- Classic PPM- Link to Classic View

15.4 Overall UI

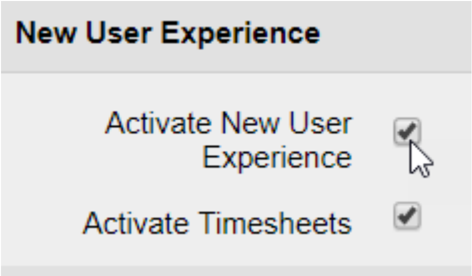
The Modern UX is not yet as configurable as Classic UI

- 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



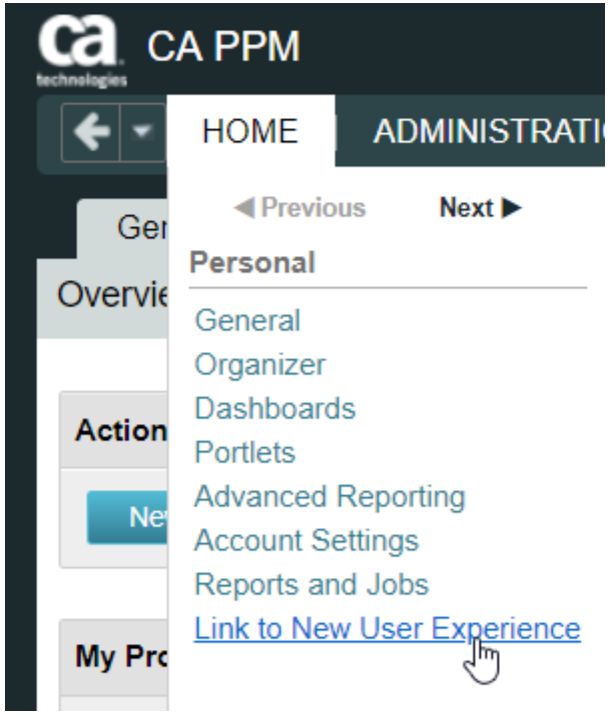
15.4 UI - Enabling

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



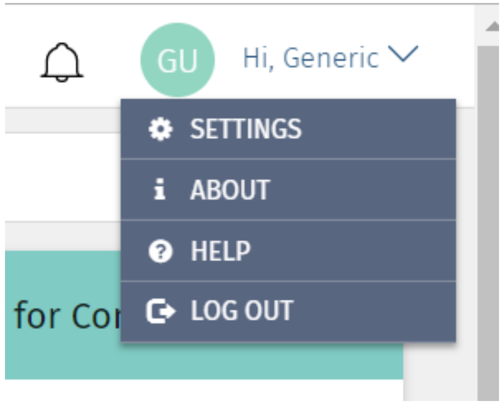
- Once enabled, create a menu link in Classic PPM to the Modern UX following the instructions found in the CA online documentation:

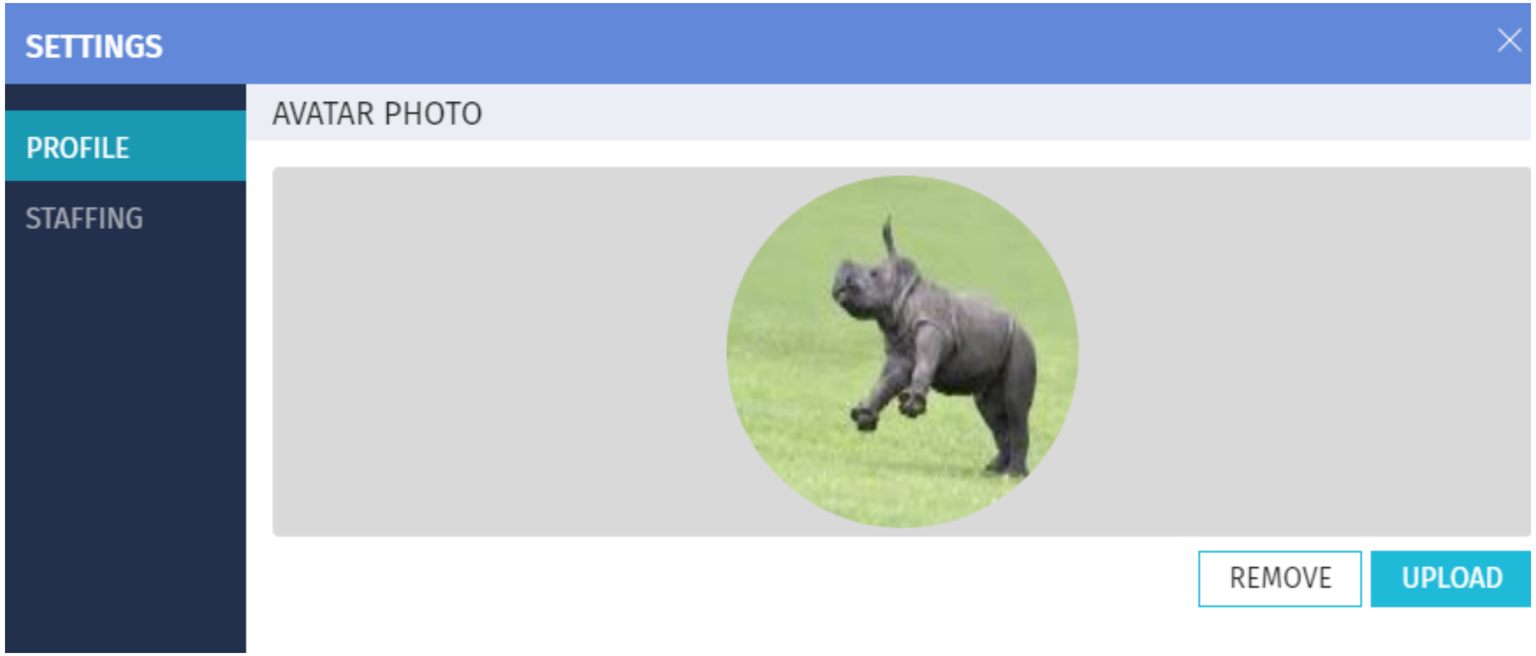
[Getting Started with the CA PPM New User Experience](#).



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



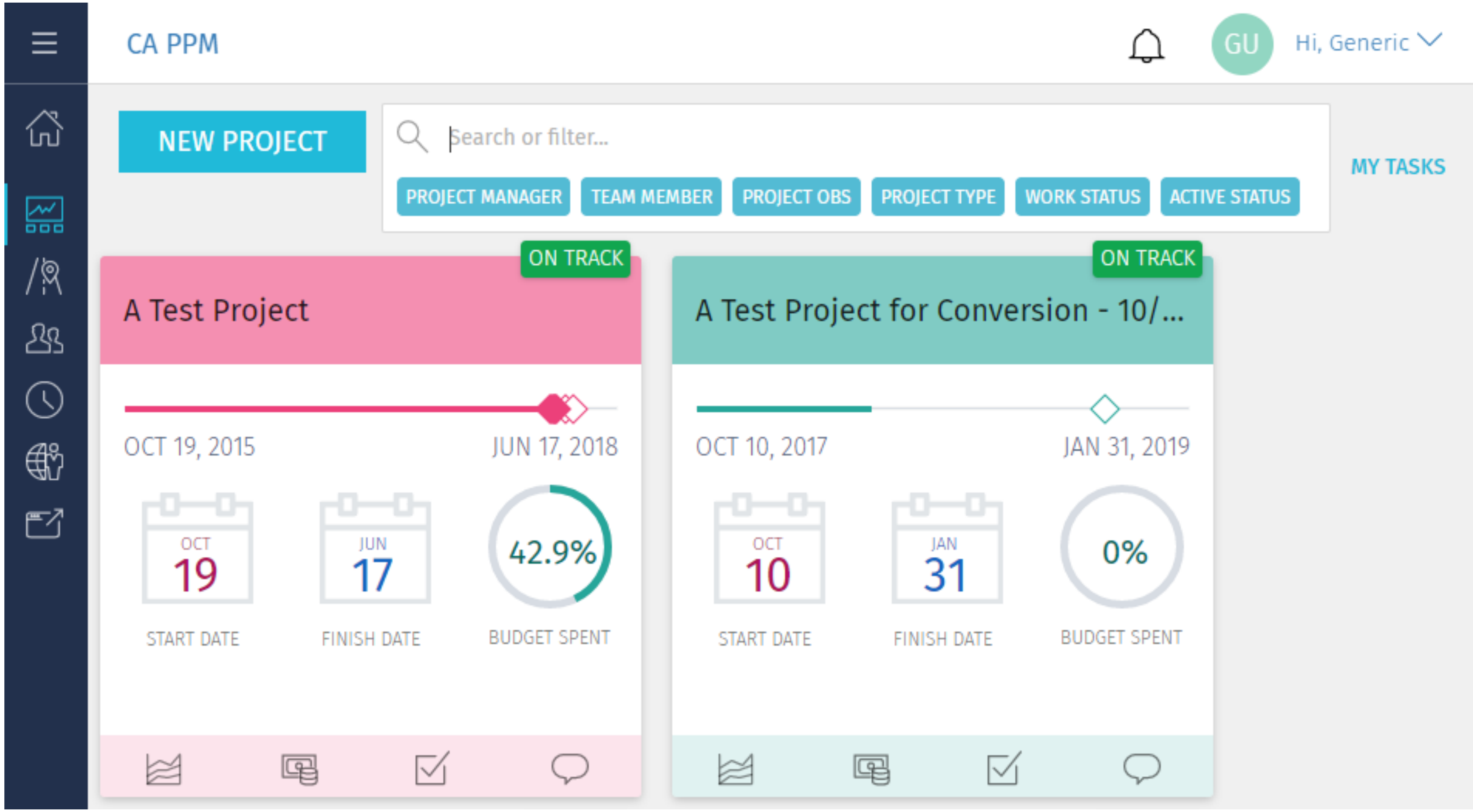


15.4 UI - Filters

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



Administration/Configuration | Blue Prints

regoUniversity 2018

Let Rego be your guide.

Blueprint Rights

Group: Admin Training - *Select Access Rights*

Access Right: *blue

Description:

Filter | Show All | Clear

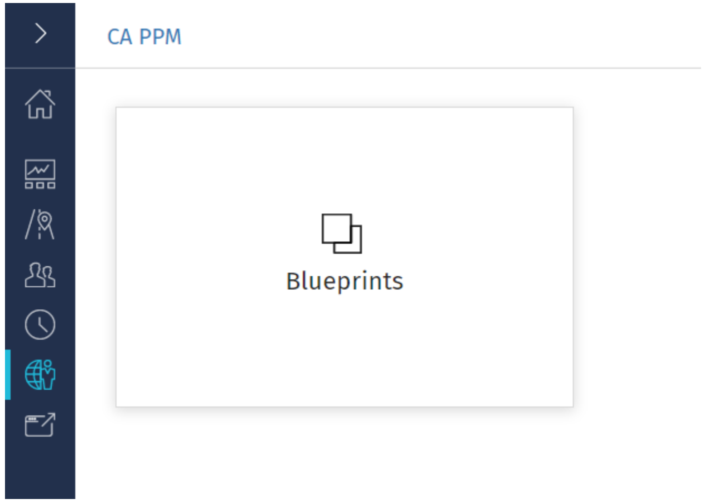
☐	Access Right ▲	Description
☐	Blueprint - Create Copy	Allows user to create a copy of an existing Blueprint. Includes Blueprint - View - All right.
☐	Blueprint - Delete - All	Allows user to delete all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
☐	Blueprint - Edit - All	Allows user to edit all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.
☐	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.

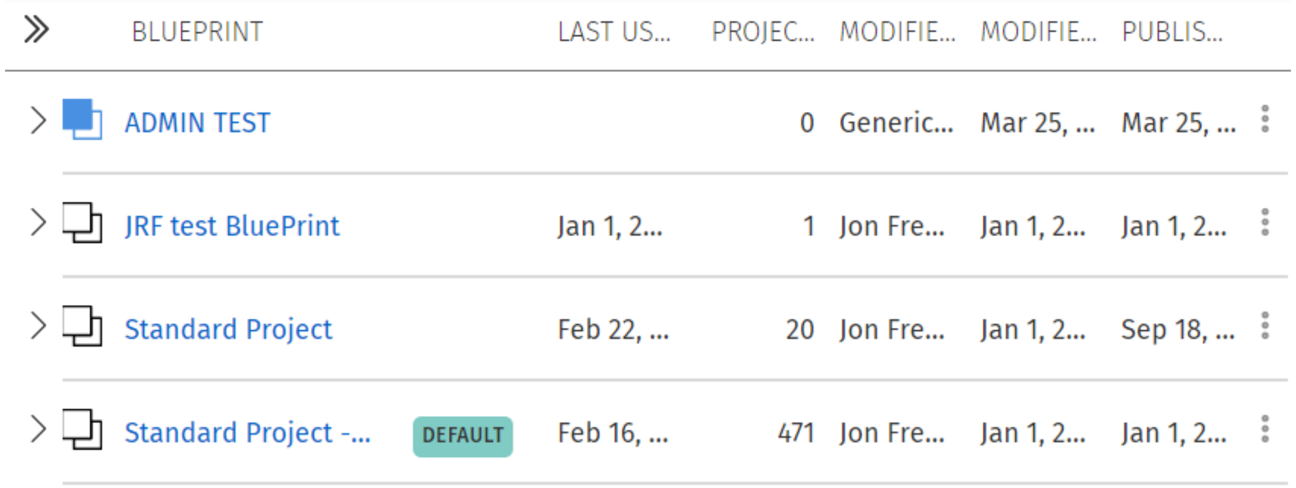
Blueprints

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

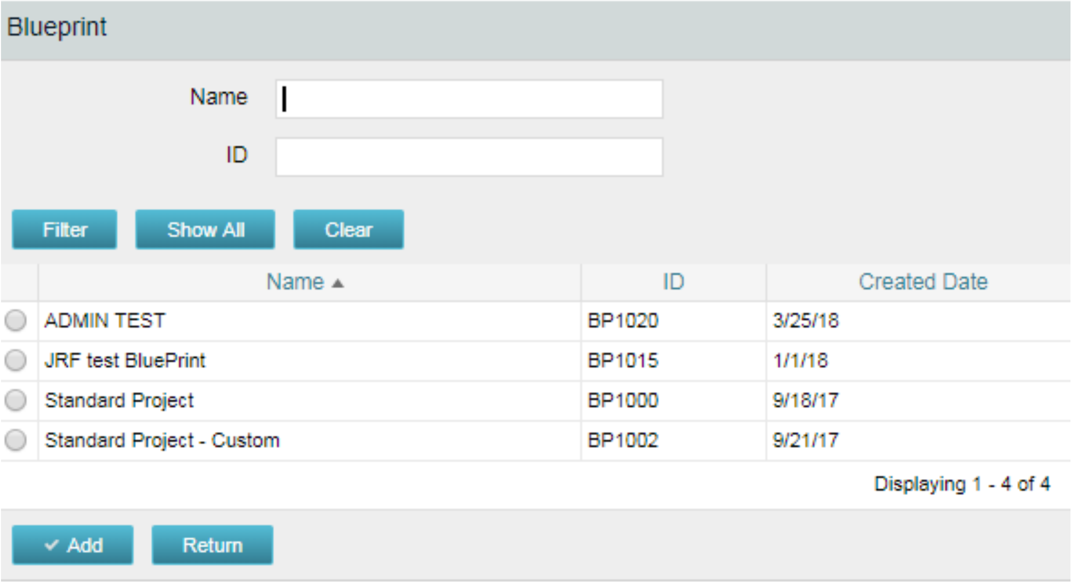
- Edit a user-defined blueprint to change the layout details
- Publish the configured blueprint to make the changes available to templates and projects

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

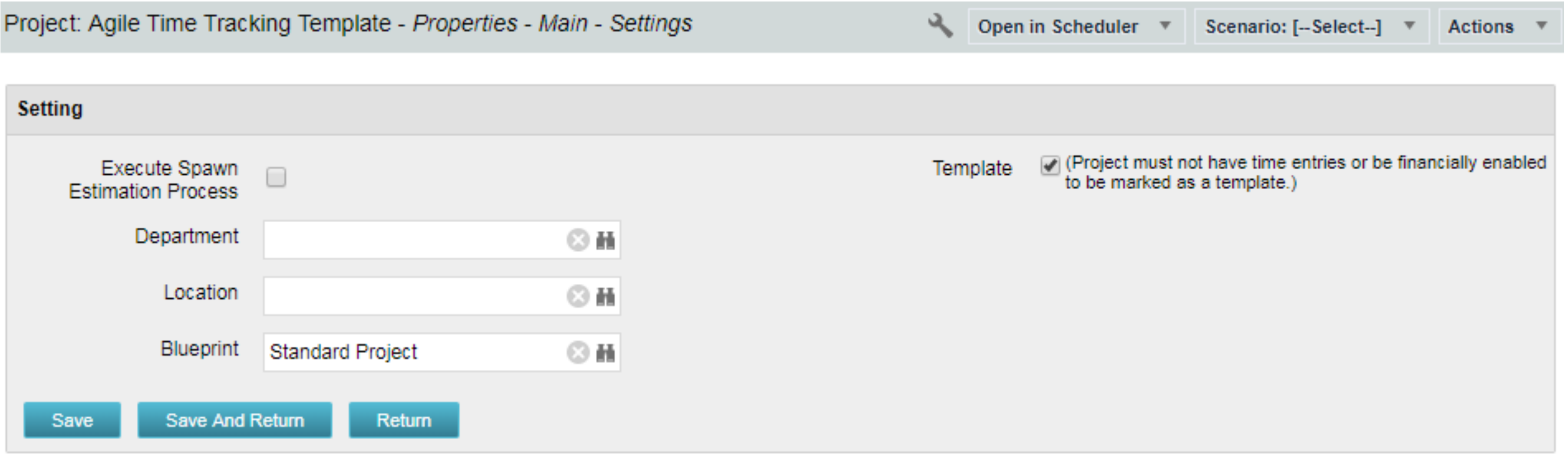
- URL
- Attachment
- Custom time-scaled value (TSV)

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.



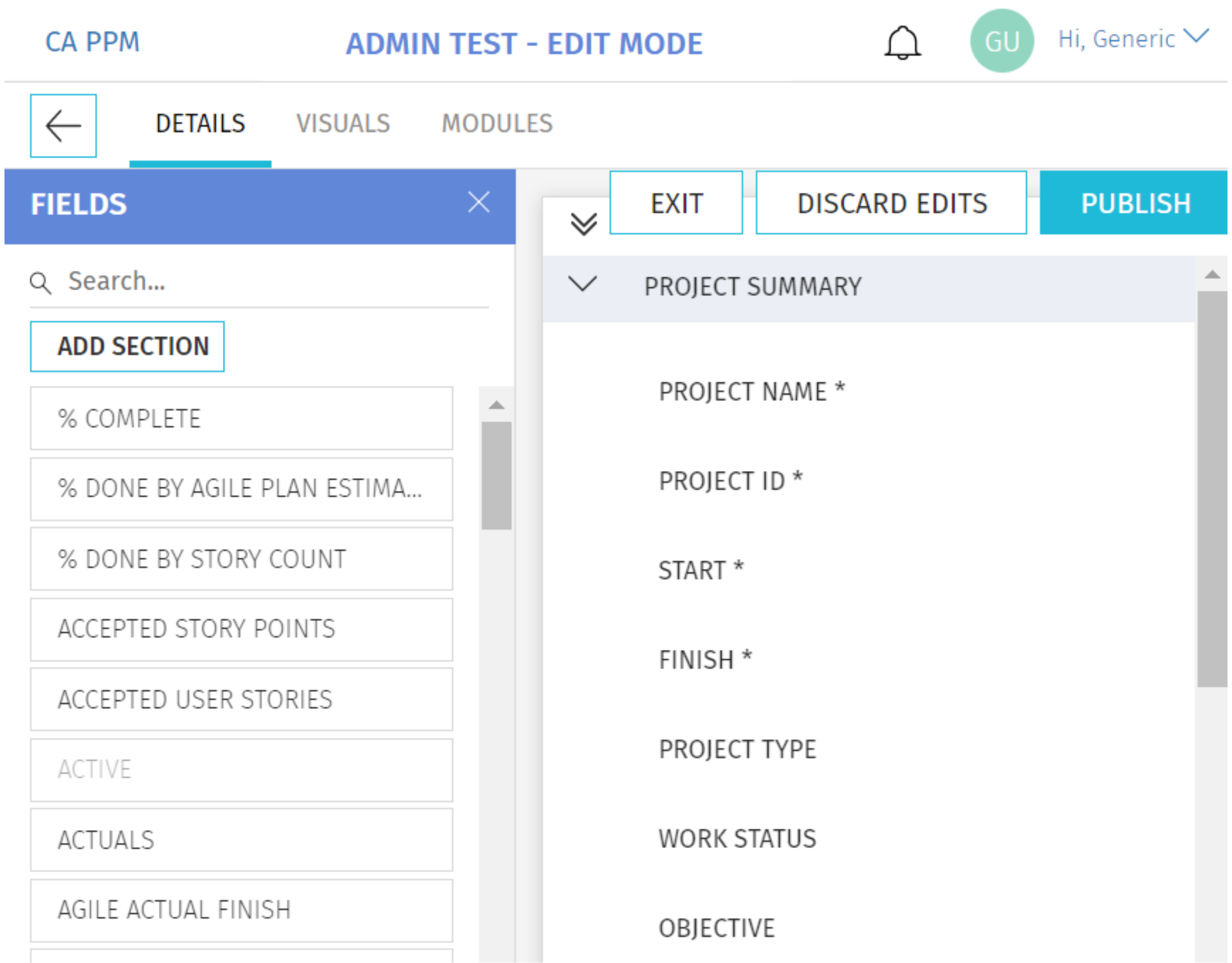
Suggested: Add to the SETTINGS subpage of your projects.



Blueprint Definition

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

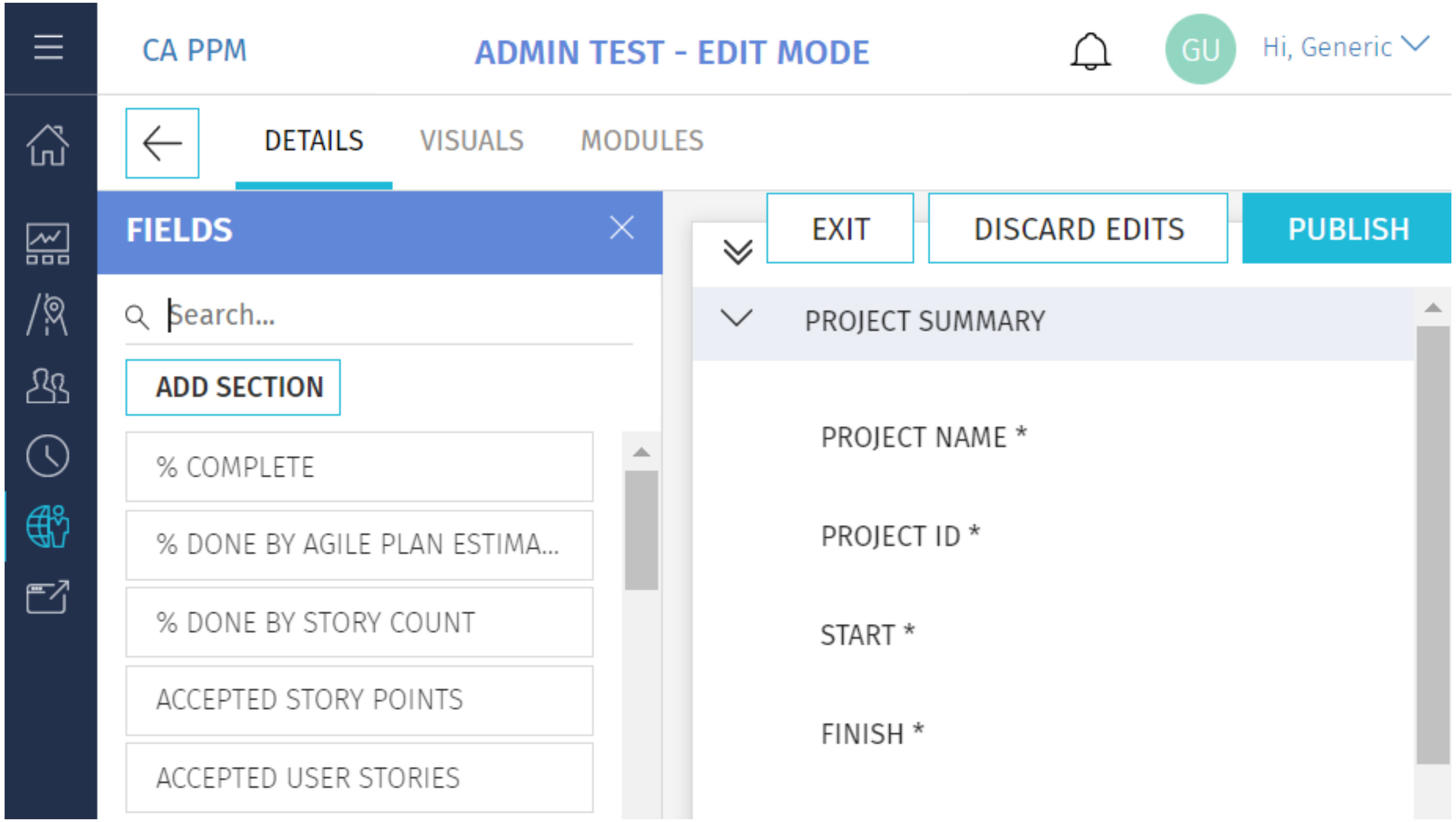
- Details
- Visuals
- Modules



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.



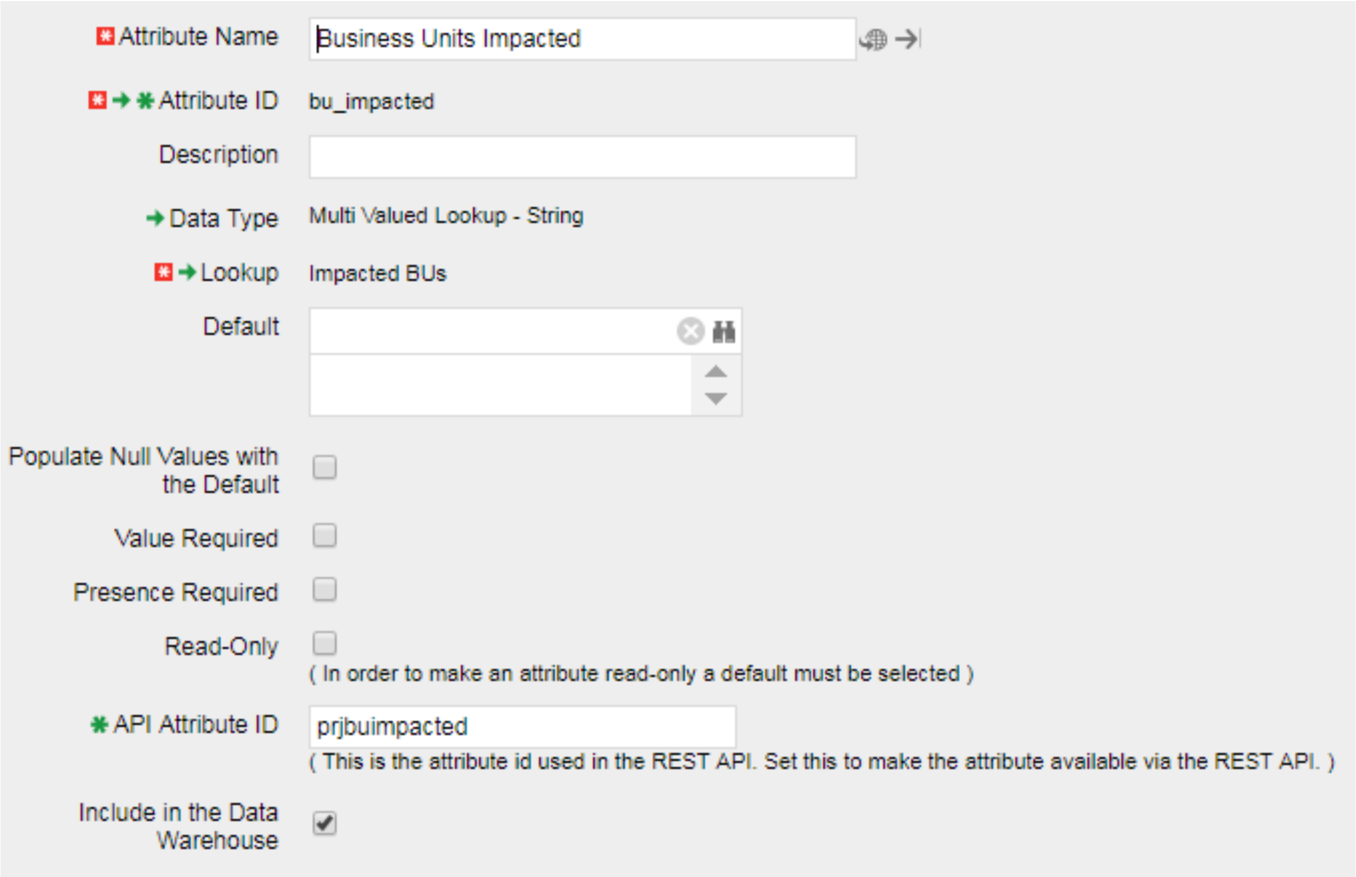
Blueprints – Managing Details

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)

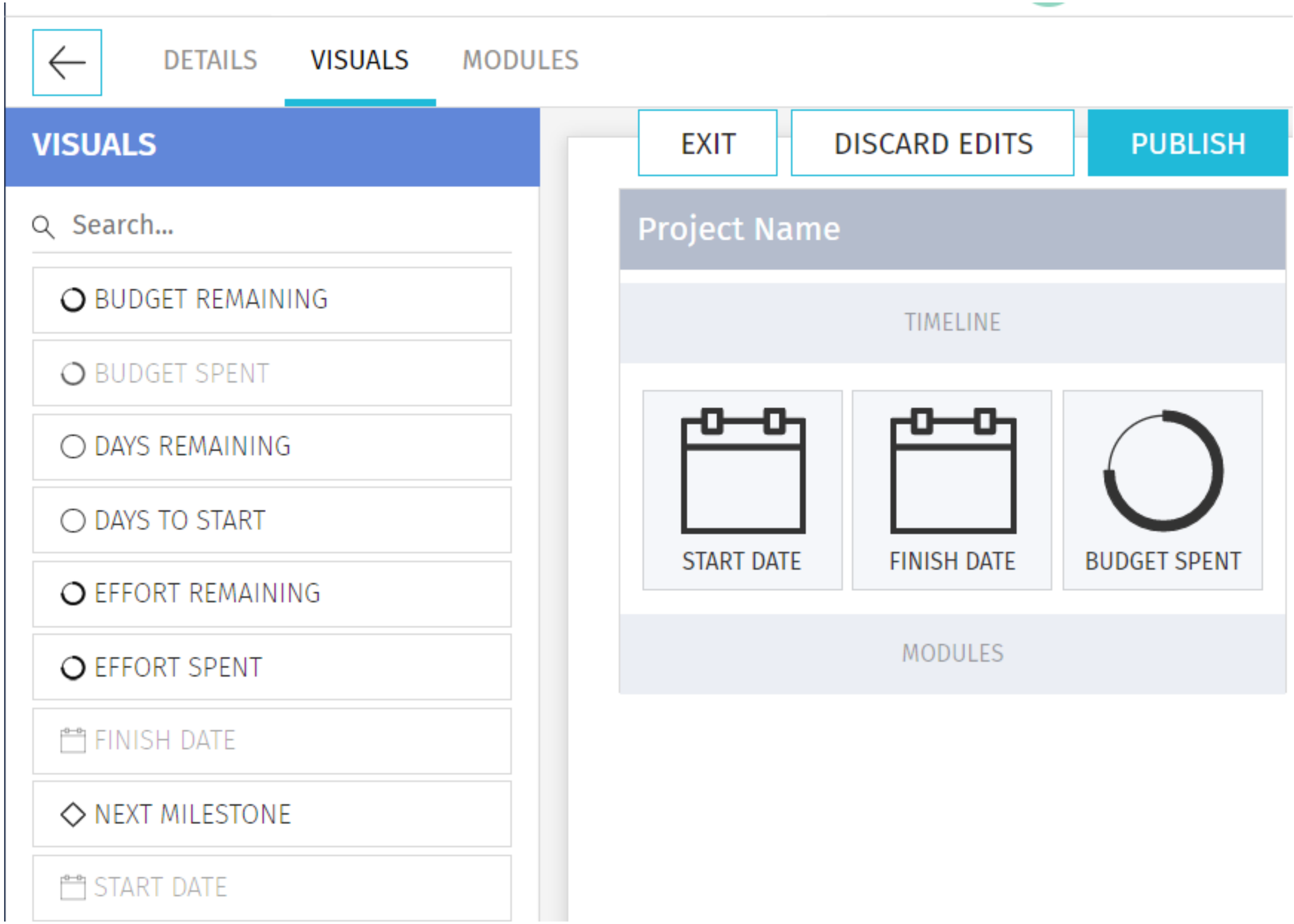
.



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.



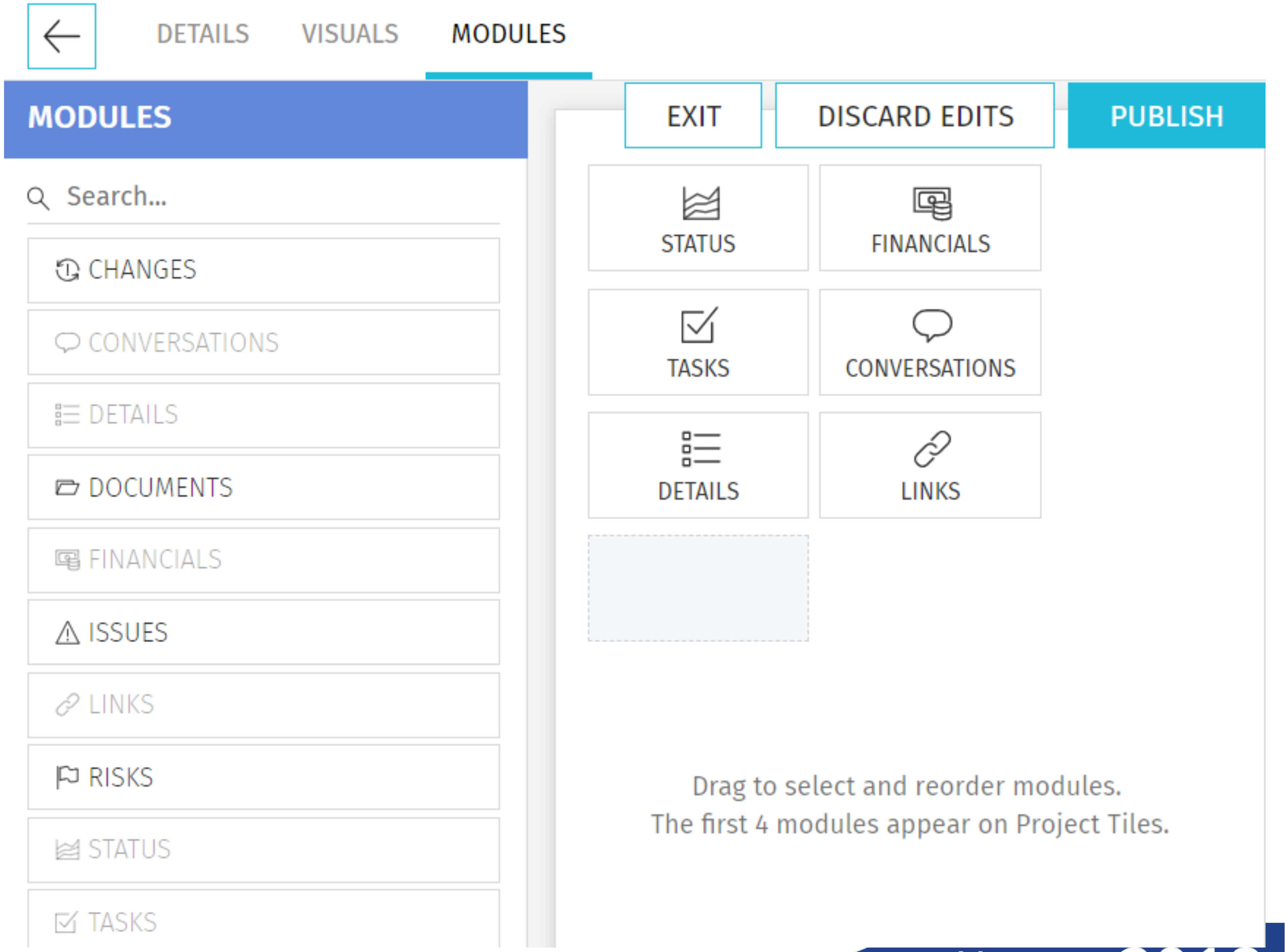
Blueprints – Managing Modules

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



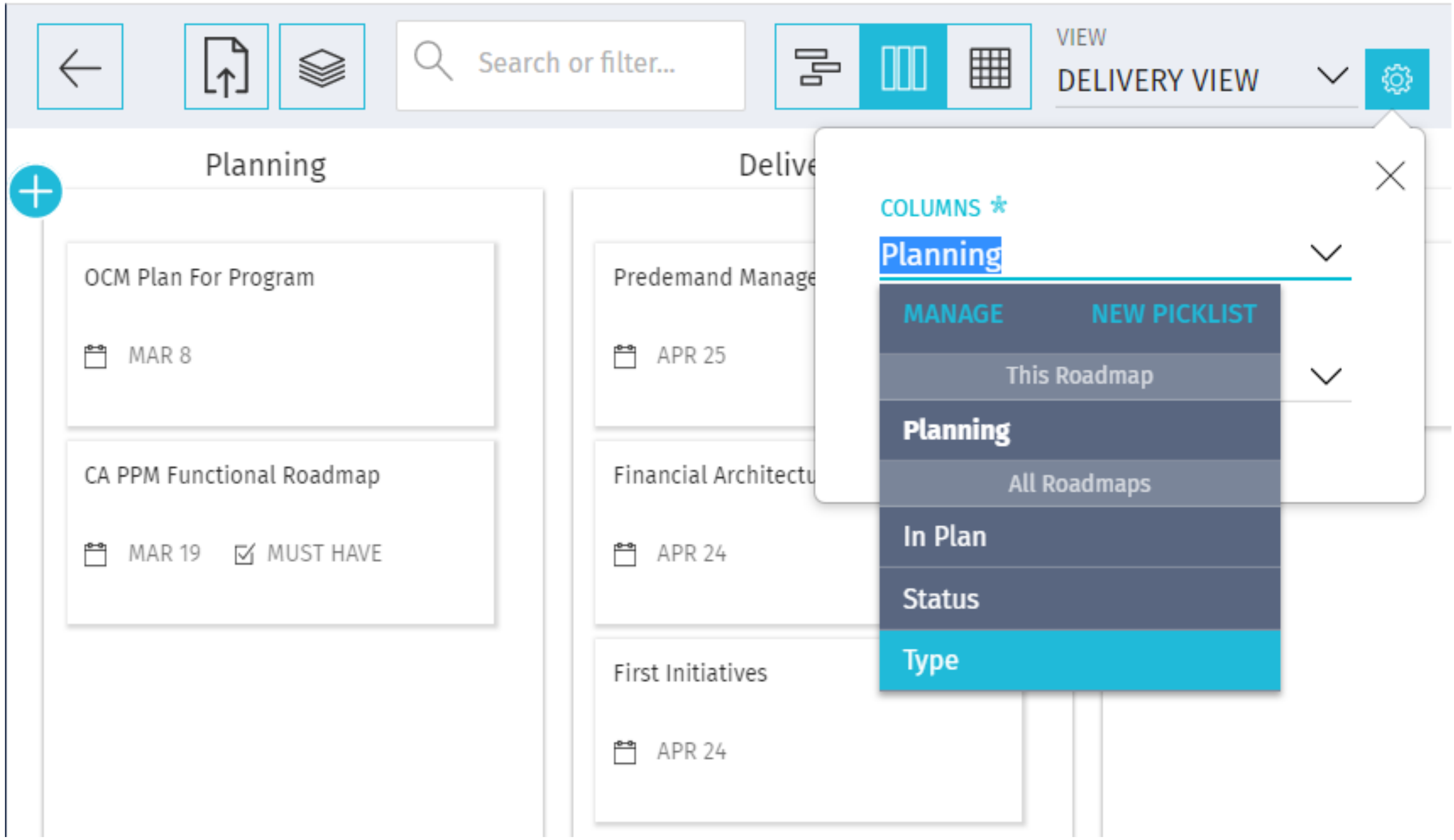
Other Customization | Personalization

regoUniversity 2018

Let Rego be your guide.

Roadmap Pick List

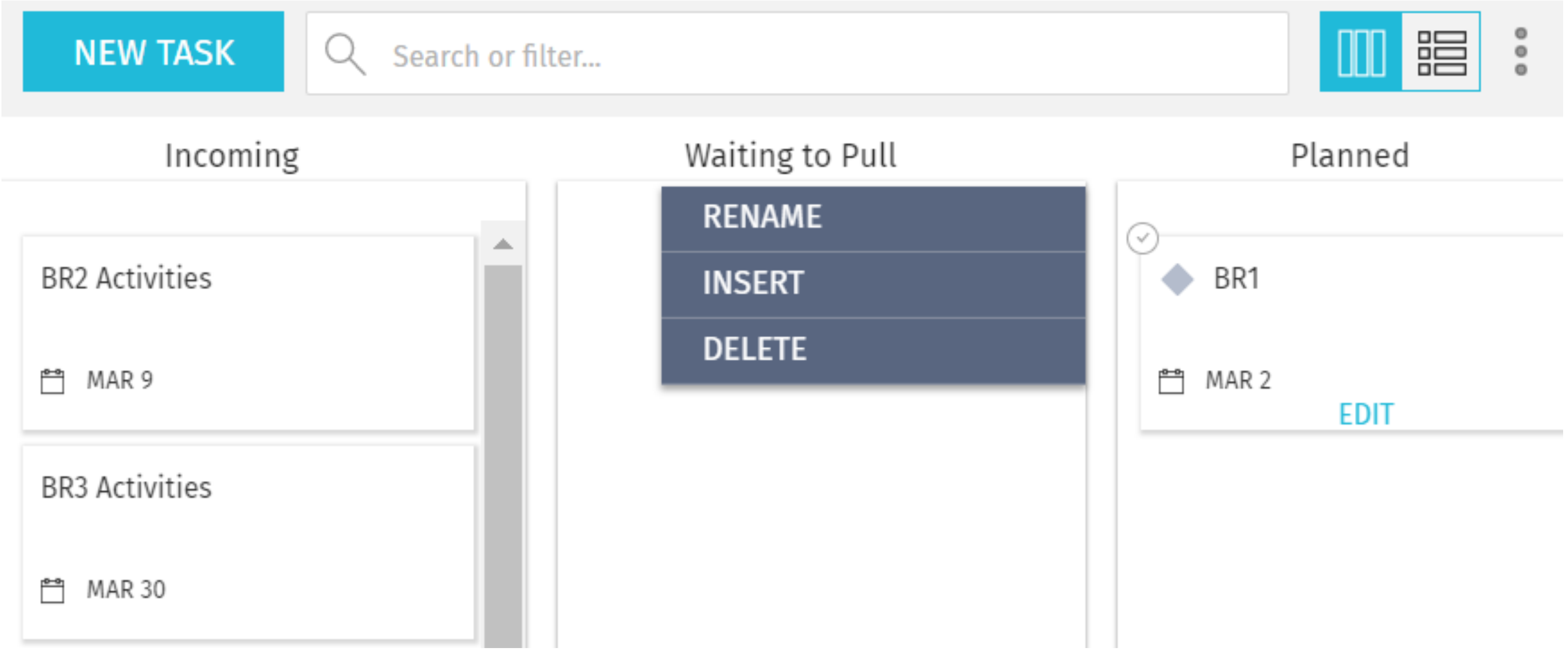
Roadmap Board view can have personalized views. These views can be shared.



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.

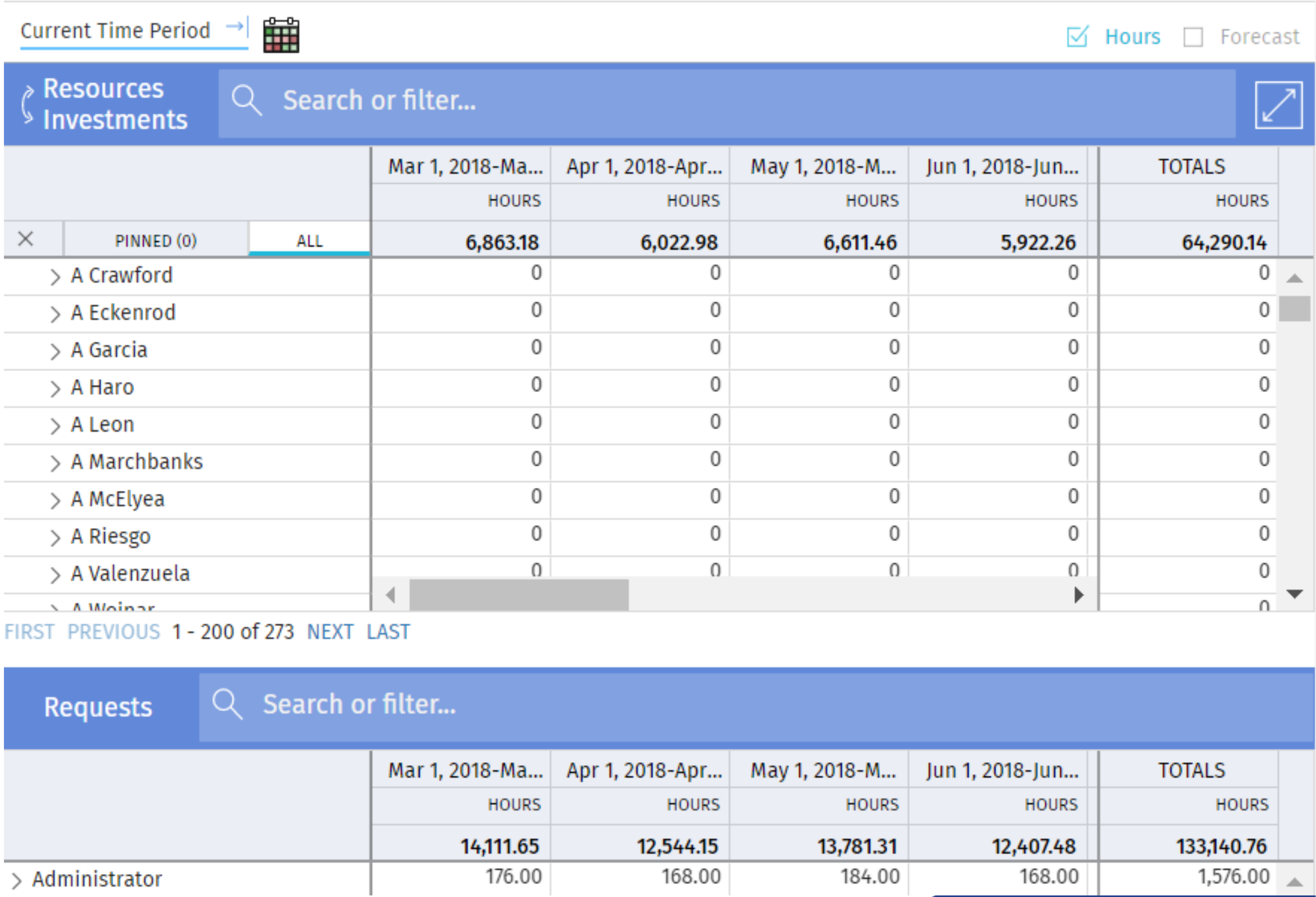


Staffing View

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

Personalization is available in 4 places:

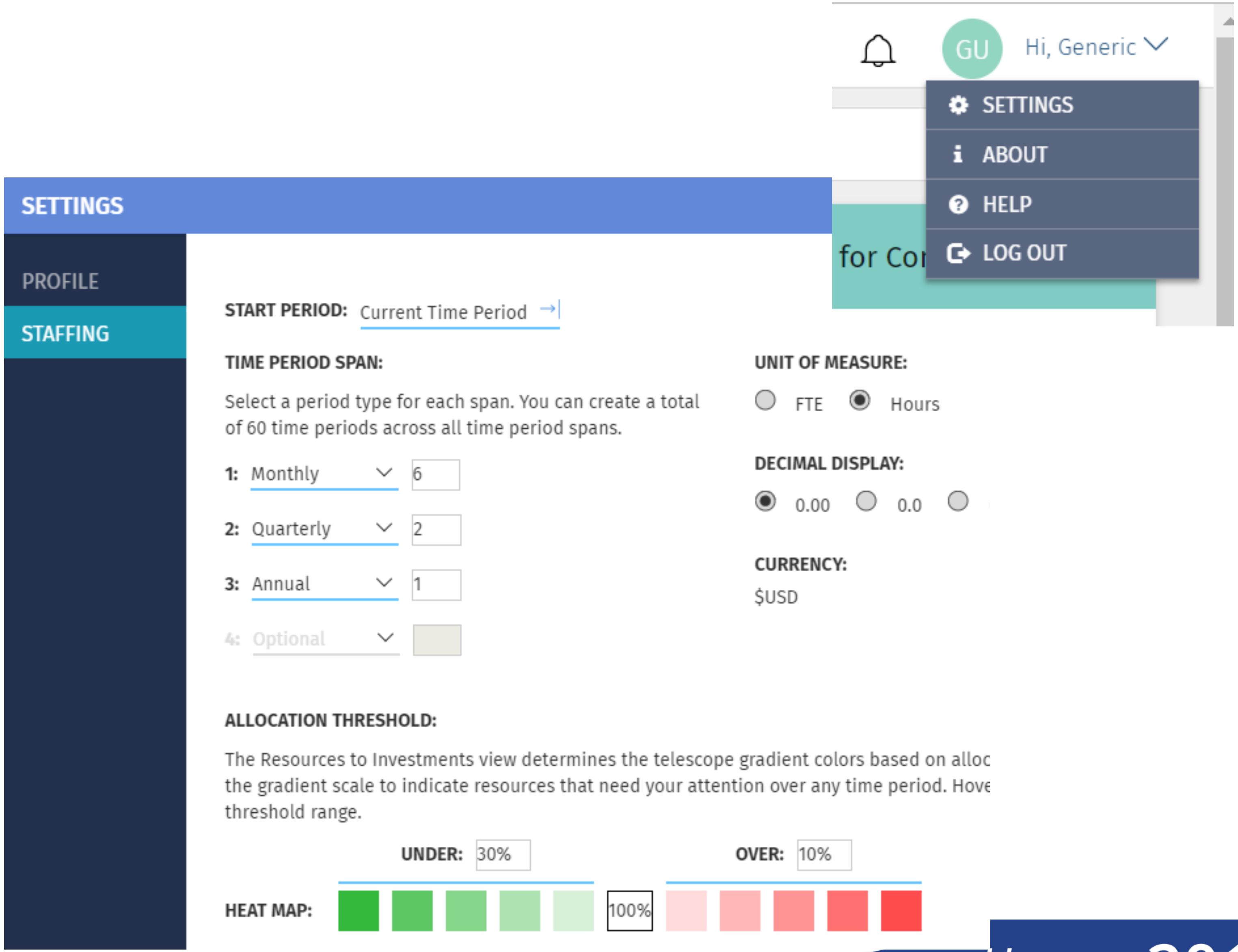
- Full Screen toggle for Resources/Investments
- Hours/FTE toggle
- Forecast toggle
- Number of periods



Staffing View- Settings

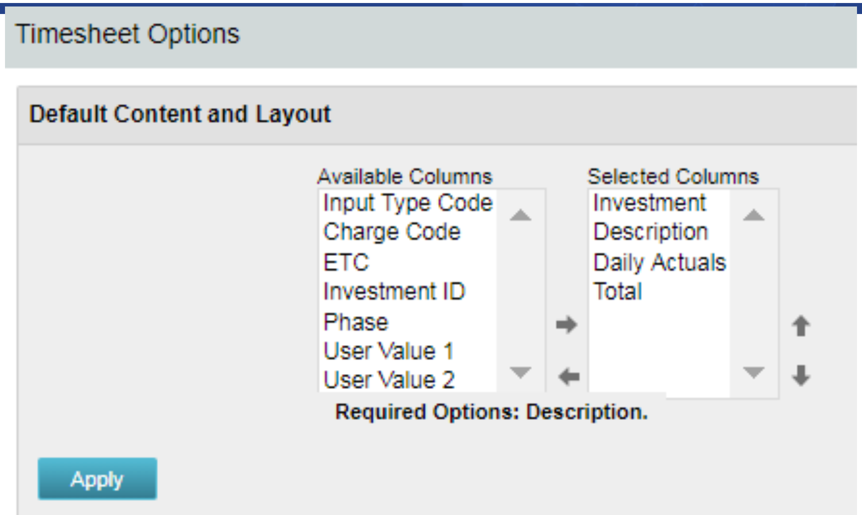
The end user can personalize the Staffing views and restore defaults

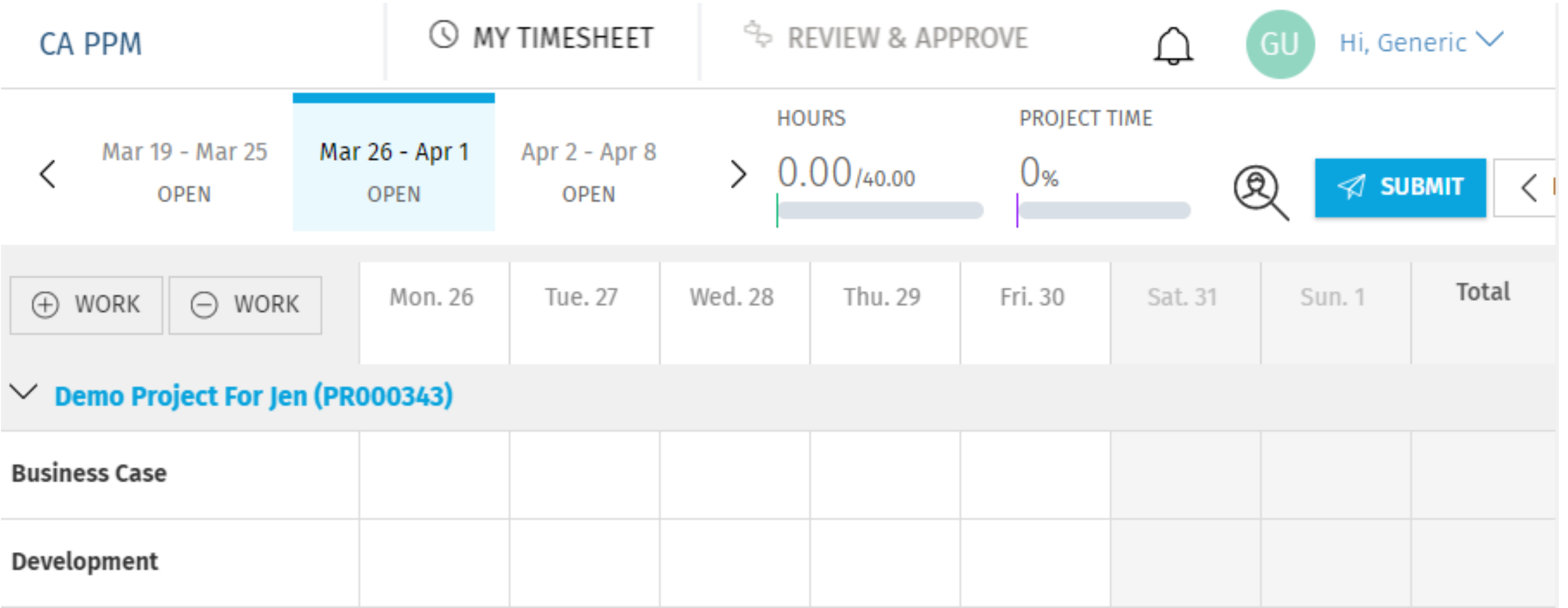
- Start Period
- Time Period Span
  - You can set this to display multiple time scale views
  - Time Periods are based on Fiscal Time Period Settings
- Allocation Thresholds
  - Over % Color
  - Under % Color



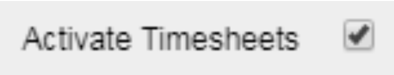
Timesheets View

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

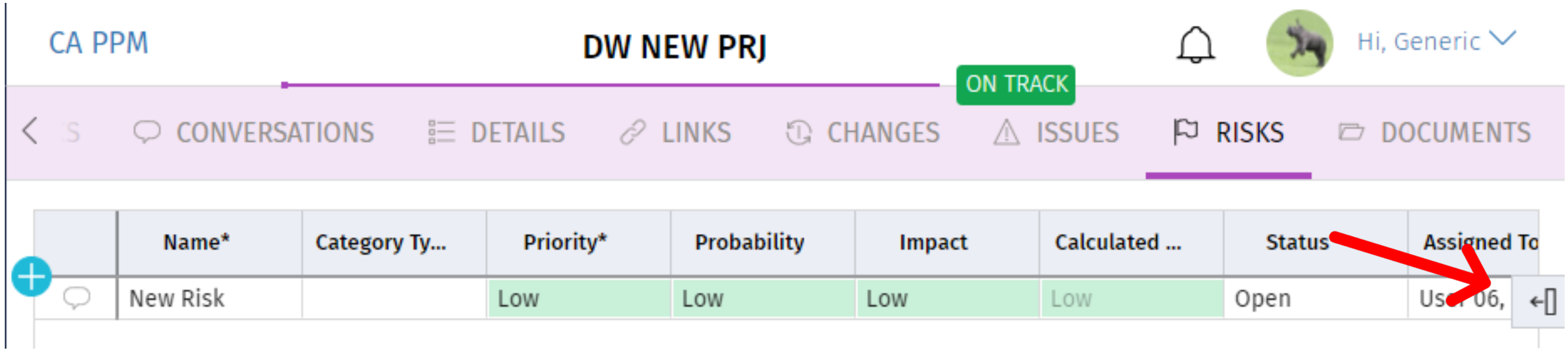


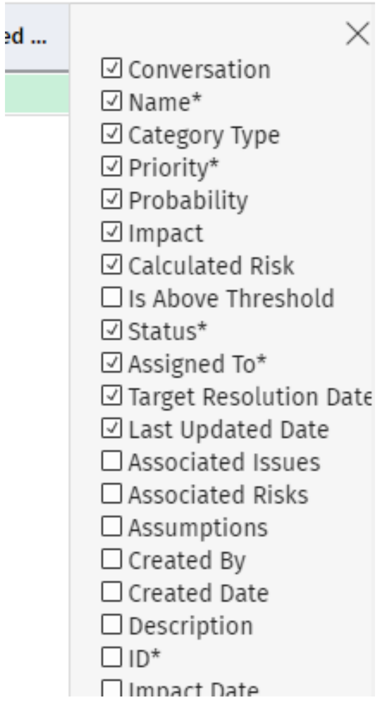
Make sure to check/re-publish Timesheet Options.

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.



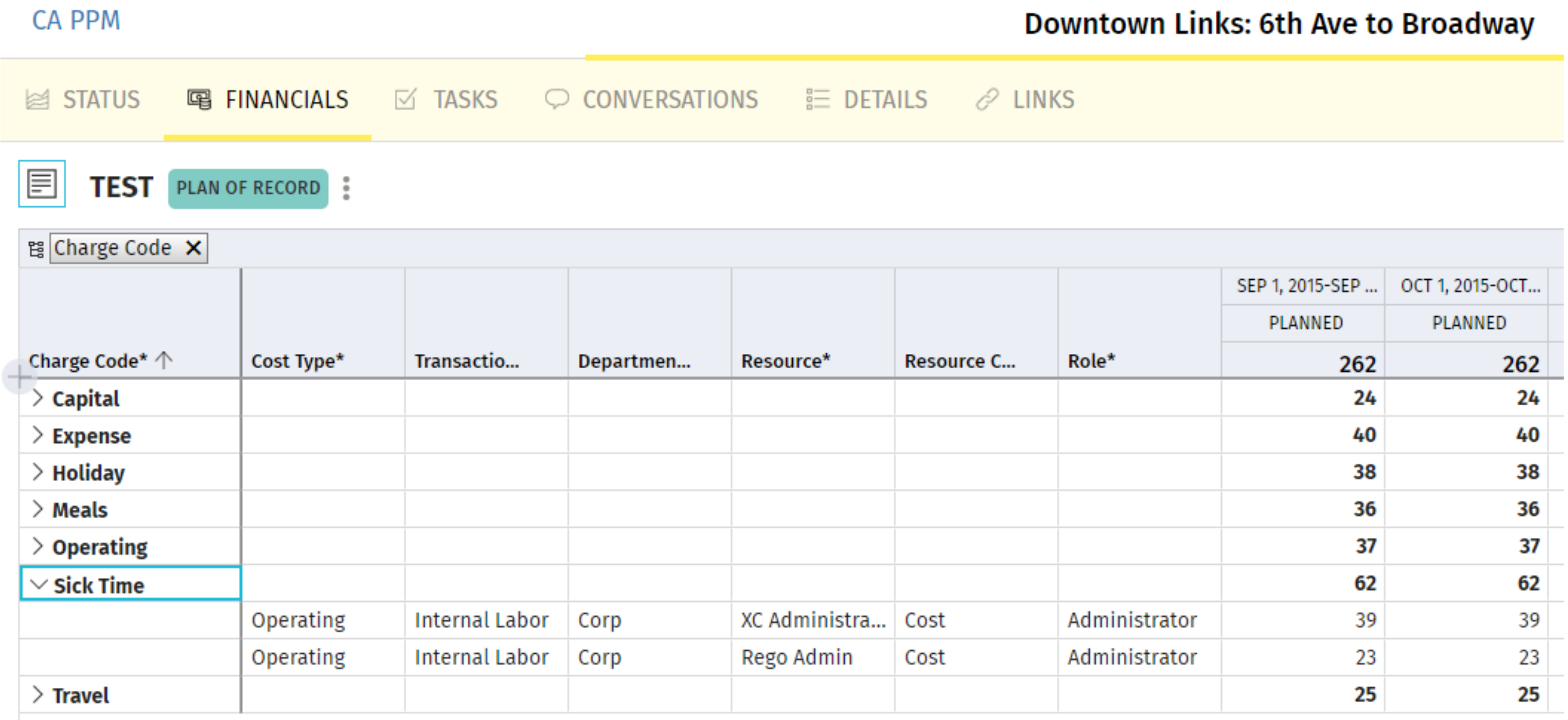


Financial View

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



Charge Code*	Cost Type*	Transactio...	Departmen...	Resource*	Resource C...	Role*	SEP 1, 2015-SEP ... PLANNED	OCT 1, 2015-OCT... 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?

regoUniversity 2018

Let Rego be your guide.

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.

Phone
888.813.0444

Email
info@regouniversity.com

Website
www.regouniversity.com