Clarity Hierarchies for Business Insights-March 17, 2022: Q/A

March 17, 2022   11:16 AM   from John to everyone:
Q: Are the programs in the list Programs from the Classic set of Programs?
A: The list of programs was created using the Modern UX Custom Investment Types
A: from Tim Ewing to everyone: John - Programs from Classic do not show in the New UX if 'IS_PROGRAM' flag checked 'Y'. You would need to create a new 'Custom Investment' that you could call Programs.

March 17, 2022   11:18 AM   from Madhuri to everyone:
Q: XOG available?
A: from Mike Richman: XOG is used to move configurations into the Modern UX. RestAPIs are used to move data into the Modern UX.

March 17, 2022   11:20 AM   from John to everyone:
Q: In a given Hierarchy, it looks like a card can have only one parent - true?
A: Yes, however, you can add the same investment to many different hierarchies -- also there is the cross investment grid that you can sort and view

March 17, 2022   11:20 AM   from Madhuri to everyone:
Q: XOG of Custom Investments available in 16.0 Clarity Version?
A: Yes
A: from Mike Richman: XOG is used to move configurations into the Modern UX. RestAPIs are used to move data into the Modern UX.

March 17, 2022   11:37 AM   from Nadine Taillefer to everyone:
Q: Is this Hierarchy example in the sandbox we have access to?
A: No, Mike created these in his instance

March 17, 2022   11:49 AM   from John Norris (privately):
Q: Can we show milestones on the timeline
A: You cannot show milestones on the hierarchy timeline, but you can in roadmaps

March 17, 2022   11:49 AM   from Yoann Darche to everyone:
Q: Is it possible to export/import the wall configuration (Blueprint/views/details/widget)
A: from Mike Richman: Yes, there is a Clarity certified Services Partner with Open Source utilities that accomplish this.

March 17, 2022   11:49 AM   from Payne, Loran to everyone:
Q: If your organization has a large Hierarchy setup, but you are only responsible for a certain portion, can you filter to only the portion you are responsible for?
A: Filters are not available in the hierarchy view, but are available on the grid and timelines views within the hierarchy module

March 17, 2022   11:51 AM   from Madhuri to everyone:
Q: Are the ResT APIs are available in 16.0?
A: Yes

March 17, 2022   11:41 AM   from Madhuri to everyone:
Q: Can we create Custom Investment Program under Program and how many levels of Program can be created
A: from Mike Richman: The Custom Investment Type (CIT) area permits you to name new objects anything you need to name it. So, you can create a CIT called "Program." And you can create a second object that might be a child to the Program object – let's call that "Program Epic" for example purposes. This way, you can create a Hierarchy with Program as level 1 and Program Epic as level 2. There is no limitation with this approach.

March 17, 2022   11:50 AM   from Tim Ewing to everyone:
Q: Also - if investment goes inactive, it automatically disappears from hiearchy. Is that intended?
A: from Mike Richman: Hi Tim, The Hierarchy was designed to have investments persist after it is marked "inactive." This way the hierarchy owner will continue to have access to the comprehensive business overview. IOW: Let's say a hierarchy intends to reflect an on-going product. A project for it was completed last year. By having this persist, the Product Owner sees the comprehensive view of the Product's activities. If you don't want completed projects to be in the hierarchy's inventory simply delete it from the hierarchy. And, when adding new investments to the hierarchy, you can filter the import list such that only active projects (or ideas or CITs) are shown.

March 17, 2022   11:16 AM   from John Norris to everyone:
Q: How does the auto-import children work?
A: To make this work, reveal the field, Parent, on any investment (Idea, Project, any Custom Investment Type (CIT)). Find the children and identify the Parent in that field. Note: What's cool is that the parent can be the same investment type (e.g. a project could be a child of another project), or the parent could be a CIT and the children be projects. After making this association in the child, go to the hierarchy, import the parent (if not already there). Right mouse click over the parent tile and select "auto-import children."

March 17, 2022   11:18 AM   from Madhuri to everyone:
Q: Hi Can we automate the creation of Custom Investment Types (Program and Portfolio_)
A: