



*rego*University 2019

SAN DIEGO

When, Why, and How to Stay OOTB

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Got Coffee?



Introductions

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



Agenda

- Defining OOTB
- Pros, Cons, and Considerations
- Rego Recommendations
 - Attributes
 - Pages and Layouts
 - Functionality
 - Portlets & Reports
 - Notifications & Workflows
 - Modern UX
- General Guidelines
- Open Mic: Client Experiences

Open Mic:

- How would you define out-of-the-box?
- Does OOTB have a positive or negative connotation?

Broadcom's Definition of Customization

“Allowing for only supported configurations ensures the security, stability, and maintainability of the service for all clients”

NOT PERMITTED

Application Customizations

- Custom Java Code
- Alterations to CA PPM Code (including XSL and Java)
- Placement of parameter or file into directory structure on a server

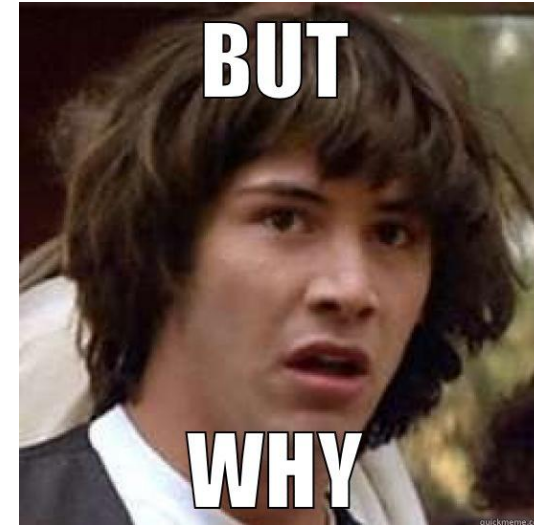
Database Customizations

- Triggers
- Stored Procedures
- Custom Tables and Schemas
- Functions

PERMITTED

- SFTP file directory provided by Broadcom
- Configuration through Clarity Studio

BUT WHY?



Supportability and upgradeability are the primary concerns that govern Clarity SaaS customization policies

Open Mic: Rego's Definition of Customization

What we commonly see are customers utilizing custom configured areas of Clarity and not the OOTB areas.

Who is utilizing a custom object area instead of the OOTB area, utilizing custom fields, etc?

Who has an environment where you can't even use ANY of the OOTB reports?



Defining OOTB

- Customizations vs Configurations
 - We're defining out-of-the-box in terms of supported configurations (Studio) rather than customizations (DB triggers).
 - Wiki: An OOTB feature is one that works immediately after installation without any configuration or modification.
- Lightly Configured vs Highly Configured
 - Lightly configured environments are considered to have stayed out-of-the-box, leveraging the application unaltered as provided by CA.
 - Heavily configured environments employ their own solutions on the Clarity platform.

We evaluate this decision to stay or deviate from out-of-the-box on a granular level, whether by module, function, or even field.



Pros, Cons, and Considerations

- Benefits of staying OOTB:
 - Ongoing alignment with CA's product roadmap.
 - Ability to quickly leverage RegoXchange and other add-in content, including the PMO Accelerator.
 - Simplified upgrades without risk of overwritten configurations.
 - Lower maintenance and training costs.
 - Excuse to help avoid task saturation.
- Drawbacks of staying OOTB:
 - Solution may not meet user requirements perfectly.
 - Requires some business process flexibility or re-alignment.
- Other considerations:
 - Change management tolerance.
 - Hard requirements of external integrations.
 - Speed to deployment.
 - Number of users impacted by the feature.

EVERYONE THINKS OUTSIDE THE BOX. ENOUGH OF THAT. BE DIFFERENT. THINK INSIDE THE BOX.



Open Mic:

- Do you feel like you've lost control of your environment?
- Are there particular areas in which you feel overly configured?



"Whoa—way too much information."

Rego Recommendations



Let Rego be your guide.

Rego Recommendations: Attributes

- Develop and maintain a data dictionary, either in Excel or directly in Clarity.
- Define an “Evergreen” process, run through a centralized control group, by which attribute usage is continuously monitored. Retire fields as needed.
- Know the attributes utilized in stock reports and portlets. Deviating from these can lead you unnecessarily down a path of custom reporting.
- Where at all possible, leverage the following OOTB attributes:
 - Status
 - Progress
 - Stage, Stage Number, Stage Count
 - Employment Type
 - Portfolio Categories
 - Planned & Budgeted Cost

Rego Recommendations: Attributes

- Reserve the OOTB financial fields for attributes that are used in cost plan groupings or have rate implications.
 - Location
 - Department
 - Transaction Class
 - Resource Class
 - Investment Class
- Understand the implications of User Value 1, User Value 2.
 - These user-defined fields are tied specifically to the transaction as generated manually or via timesheets.
 - They cannot be used to auto-populated cost plans because they are not associated with the resource object.

Rego Recommendations: Attributes

- Create your own Vendor object. The OOTB Vendor field is limited and not included in WIP.
- Do not deviate from the fields that have inherent security rights.
 - Idea Initiator
 - Idea Manager
 - Project Manager
 - Resource Manager
 - Portfolio Owner
 - Portfolio Stakeholder
- For custom lookups, leverage an object-based dynamic query where possible (e.g., All Resource Browse). These are inherently supported by the workflow engine.

Open Mic:

- Has anyone had an ah-ha moment about their attributes?
- What can you do better in your organization?
- Are you backed into a corner?



Rego Recommendations: Screens

- Within a project, align as best as possible to the standard set of subpages:
 - Project Summary
 - Schedule Performance
 - Financial Performance
 - Status Reports
 - Settings
- Configure Page Layout to activate or deactivate tabs.
- Reorganize the Application Menu but leave the Administration Menu unchanged.

Rego Recommendations: Functionality

- Create your own security groups and roles.
- Leverage the OOTB financial plans if at all possible.
- Look to repurpose NPIOs before creating a custom investment object. NPIOs all have inherent time tracking capabilities.
- Leverage the OOTB status reporting sub-object but augment it with custom processes for publication and trending.
- Create your own Idea Approval workflow. Typically easier to create a flow from scratch than modify the PMO Accelerator version.

Open Mic:

- Who has created custom objects instead of repurposing NPIO's?
- Do you feel successful with this approach?



Rego Recommendations: Functionality

- Attempt to stay as basic as possible for timesheet approvals. Do not overly complicate an approval flow. Use basic group approval rights or an auto-approval wherever possible.
- Design and develop a custom chargeback module. Leverage the OOTB credit and debit rules as needed, but avoid the Generate Invoices job.
- Customize your own set of stage gates and supporting workflow as needed.
- Avoid the requisition functionality. Opt for visibility rather than a rigid process.

Open Mic:

- Does anyone have an overly complicated timesheet approval process?
- How do your users respond to time governance?
- Is anyone utilizing requisitions?



Rego Recommendations: Portlets & Reports

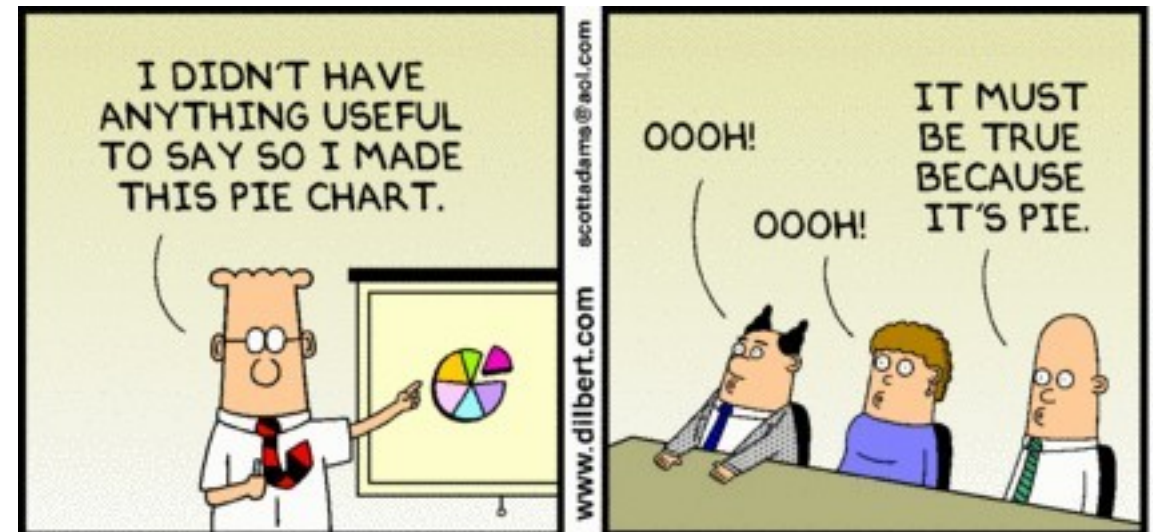
Configure the project's Dashboard tab to add more valuable, relevant portlets.

OOTB Portlets

- Leverage the OOTB Resource Planning portlets, primary because of their inherent edit capabilities.
- If tweaks are required to an OOTB query or portlet, make a copy such that a PMO Accelerator upgrade will not overwrite the changes.

Custom Portlets

- For custom portlets, attempt to first use an OOTB system provider. These are tuned, supported queries that will be enhanced in alignment with the product roadmap.
- Create as many Portlets and Reports as needed by users – getting data out in an easy way is how most users see value.



Rego Recommendations: Notifications & WF

- Utilize the OOTB notifications and associated emails for basic communications or reminders. Modify the wording of those default notifications, however, to be more intuitive or process-specific.
- Email is how many do their job. Create custom notification or stalker emails with direct application links and special formatting.
- Automate manual processes whenever possible with workflow processes to reduce administrative burdens.

Open Mic:

- Anyone have users that complain about going into the system?
- What are their stumbling blocks?

Rego Recommendations: New UX

- The list of attributes available to Blueprints continues to grow.
 - Stage can now be added to Blueprints
 - Check to see if API Attribute ID is populated, including for OBS.
 - Workaround: Channel
- Only single-value, static lookups are available for Roadmap synchronization. This applies to both stock and custom attributes.
 - Goal is the most challenging example.
 - Workaround: Sync process w/ Roadmap-enabled field
- In Roadmaps, embrace personalization of picklists but provide a set of standard Roadmap Item lookups to add consistency across instances.

Summary Guidelines

- Nearly every implementation requires some level of configuration. The key is to think strategically about each deviation from the standard solution.
- Understand the immediate and long-term impacts.
- Weigh the priority of requirements in the decision process. Know which are hard and which are less so.
- Don't try to fit a square peg into a round hole. Understand how much requirement "bend" is reasonable.
- Chances are that somewhere, someone has done it before. Ask!

Questions?



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