

# When, Why, & How to Stay OOTB

Your Guides: Wes McCoubrie and Grant Zemont

# Agenda

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

# Introductions

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



# Open Mic:

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



## Chapter 8: Customizations

CA Technologies' SaaS solutions are delivered as a standardized service. This standardization allows CA Technologies to deliver high quality services in a repeatable and cost effective manner. To achieve this standardization certain design principles are enforced to limit customizations that may cause instabilities in the delivery of the service. Allowing for only supported configurations ensures the security, stability, and maintainability of the service for all clients.

### Application Customizations

Customization of the CA PPM application layer or alterations/insertions of any files on the application servers are not compatible with CA PPM. CA PPM leverages a uniform code base and, therefore, cannot support application customizations. Customizations under this policy include, but are not limited to, the following:

- Custom Java code
- Alterations to the base CA PPM code set including XSL and JAVA files
- Placement of a parameter or any other file into the directory structure of a server. Note an SFTP directory is available as a mounted directory at the application level for file uploads; this directory is available to process based scripts.

### Database Customizations

Customization of the CA PPM database schema is not permitted. However, CA PPM SaaS solution allows and supports all configurations done through CA PPM Studio. Customizations under this policy include, but are not limited to, the following:

- Triggers
- Stored procedures
- Custom tables or schemas
- Functions

Supportability and upgradeability are the primary concerns that govern CA PPM SaaS customization policies. The CA Technologies Global Delivery team (GD) can be engaged to design, build, and support custom components to conform to CA SaaS support policies. GD reviews requirements and works directly with CA Services and the CA SaaS team to design supportable components that can be deployed to CA SaaS environments.

# Defining OOTB

- In the context of this presentation, 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.
- By those measures, an environment can be classified by the degree with which it has been 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 CA PPM 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.

# 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

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Let Rego be your guide.

# Rego Recommendations: Attributes

- Develop and maintain a data dictionary, either in Excel or directly in CA PPM.
- 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.

# 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.

# 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.

# Rego Recommendations: Portlets & Reports

- Leverage the OOTB Resource Planning portlets, primary because of their inherent edit capabilities.
- 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.
- If tweaks are required to an OOTB query or portlet, make a copy such that a PMO Accelerator upgrade will not overwrite the changes.
- Configure the project's Dashboard tab to add more valuable, relevant portlets.
- 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.

# 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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### Phone

888.813.0444



### Email

[info@regouniversity.com](mailto:info@regouniversity.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)