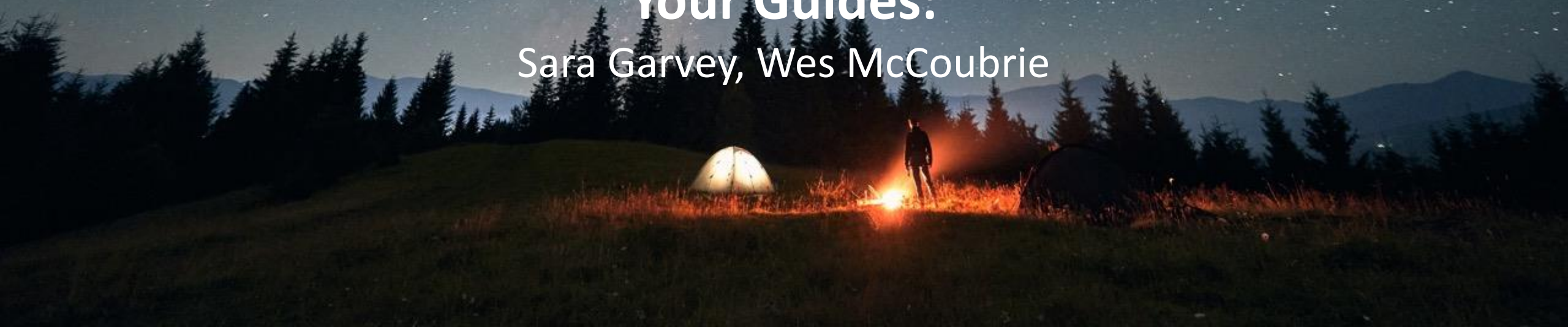




Staying OOTB | When, Why, and How

Your Guides:

Sara Garvey, Wes McCoubrie



Agenda

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



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
- Direct DB Updates

PERMITTED

- SFTP file directory provided by Broadcom
- Configuration through Clarity Studio
- SOAP and REST API updates

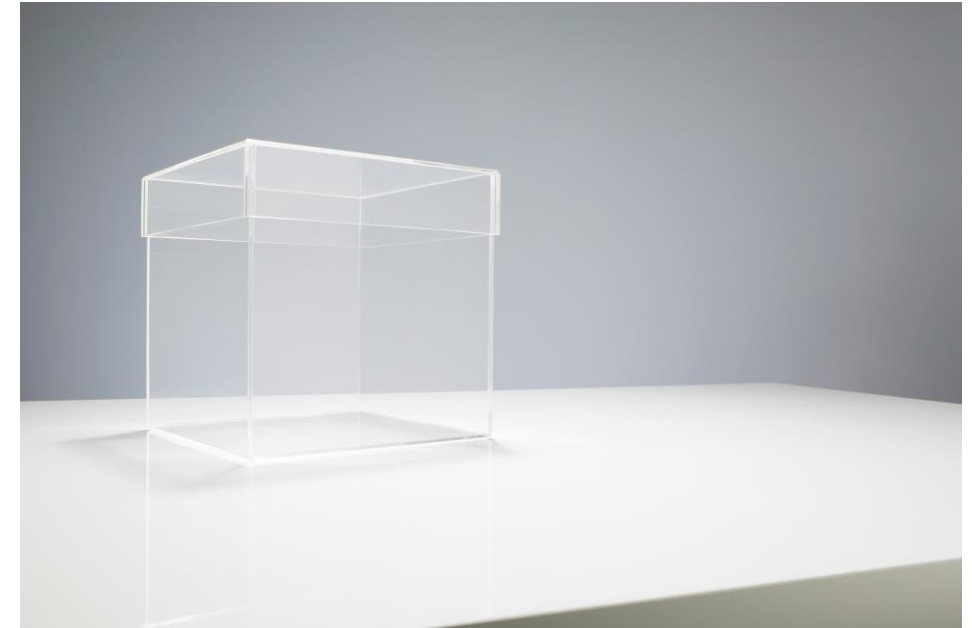
Defining OOTB

- 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 Broadcom.
 - 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 Broadcom'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.



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, configuring the LOVs as possible:
 - Status \ Progress
 - Stage, Stage Number, Stage Count
 - Goal
 - Employment Type
 - Portfolio Categories (1-4)
 - Work Status
 - Planned & Budgeted Cost

Note: When leveraging a stock LOV, always create your own values; avoid “repurposing” existing values as their labels can get overwritten during upgrades.

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 (Classic)
 - Portfolio Stakeholder (Classic)
- For custom lookups, leverage an object-based dynamic query where possible (e.g., All Resource Browse). These are inherently supported by the workflow engine.

Opinion: I've come around on the need for a custom ODF_PPA_WIP table that captures Vendor and other custom attributes not currently in WIP.

Rego Recommendations: Classic 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.
- Avoid NPIOs and classic Programs. These are not ported to the Modern UX.
- 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

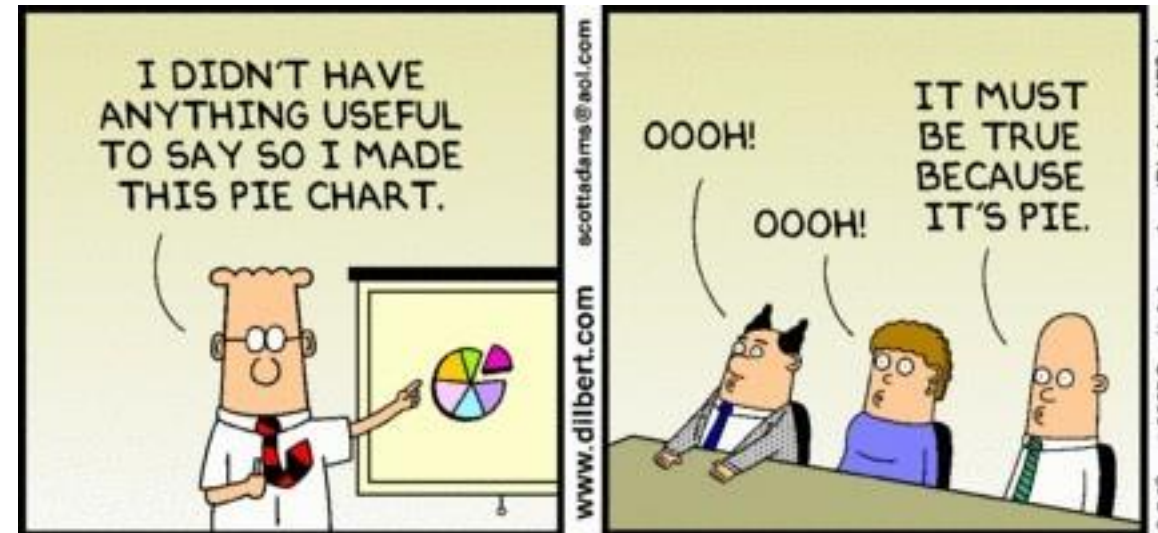
Configure the project's Dashboard tab to add more valuable, relevant portlets.

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.

Rego Recommendations: Modern UX

- Minimize the number of Blueprints leveraged. It's a powerful tool but can become an administrative nightmare if not managed strategically.
- The stock Status attribute (Unapproved, Submitted for Approval, etc.) remains an important stock field to leverage. However, in the Modern UX all values are displayed regardless of what's actually allowed. Create your own Status attribute and use a background process to drive the stock values.
- Consider replacing workflow-driven stock emails and action items with custom, HTML based emails that support links directly into the Modern UX. Rego's AIR solution perhaps!
- CITs cannot yet be deleted, but don't let that deter their use.



Rego Recommendations: Modern UX

- Know that dynamic lookups cannot yet be used as swimlanes in Roadmaps.
- Also in Roadmaps, embrace personalization of picklists but provide a set of standard Roadmap Item lookups to add consistency across instances.
- There are still some attributes that cannot be imported into Roadmaps (e.g., Manager). In these cases, it's acceptable to create a custom “mirror” attribute kept in sync by a background process.
- Leverage the newly introduced “Parent” attribute instead of creating your own hierarchical attribute.

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?



Let Rego be your guide.

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- Class Name = **regoUniversity**
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