LAS VEGAS

regoUniversity 2025

Sponsored by ValueOps by Broadcom | Clarity by Broadcom | Rally by Broadcom | ConnectALL by Broadcom | Insights by Broadcom

When, Why, and How to Stay OOTB

Your Guides:
Mike Pokorny and Josh Childers

Gold Sponsor aws

Introductions

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

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

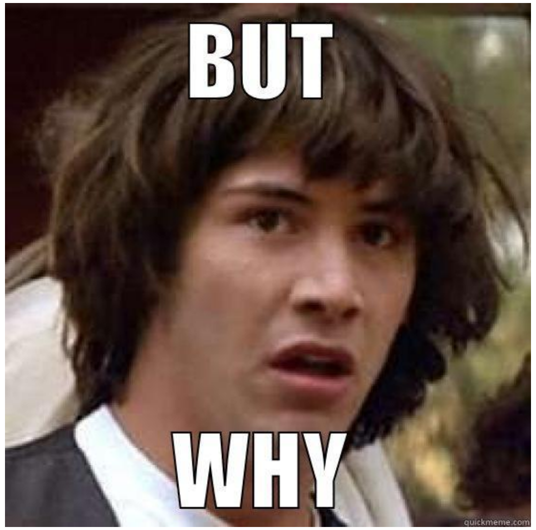
Database Customizations

- 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: Out-of-the-Box vs Custom Configurations

We commonly see customers utilizing custom configurations instead of OOTB Clarity.

- Who is utilizing a custom object area instead of the OOTB, 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 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.

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

Rego Recommendations: Attributes

- Develop and maintain a data dictionary, either in Excel or directly in Clarity.
  - regoXchange Data Dictionary
- Define an "Evergreen" process, run through a centralized control group, by which attribute usage is continuously monitored. Retire functionality 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
    - Roadmap Author
- 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 sections:
  - Project Summary
  - Schedule Performance
  - Financial Performance
  - Stakeholders
  - Settings
- Utilize the new "Subtab" functionality to keep the properties page clean
- Configure the Blueprint to display and hide modules, sections, and fields when necessary

Rego Recommendations: Functionality

- Create your own security groups and roles.
- Leverage the OOTB financial plans if possible.
- 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.
- 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.
- Customize your own set of stage gates and supporting workflow as needed.

Open Mic

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

Rego Recommendations: Portlets & Reports

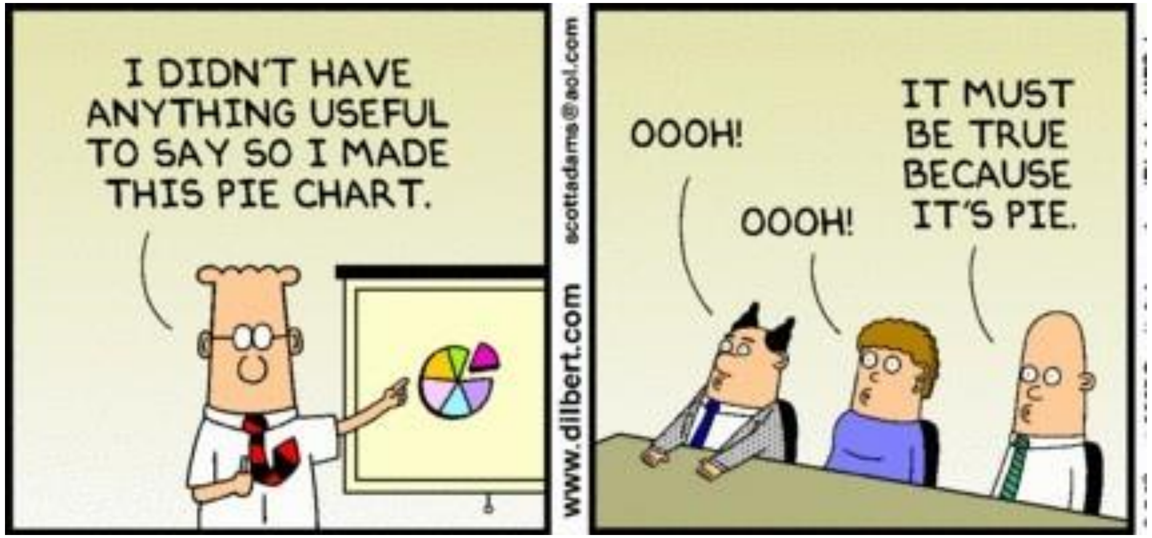
Configure Canvas/Channels on the Project blueprint to bring in relevant reporting.

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 & Workflows

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?

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?

regoUniversity

Master Clarity with Rego University

Earn Certifications in Administration, Leadership, and Technical Proficiency

Let Rego be your guide.

Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to continue our **certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.

Certification Requirements:

- **Completion**: 12 units per certification track
- **Eligibility**: Open to all Rego University attendees

Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.

Thank You for Attending Rego University

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 Provider = **Rego Consulting**
- Class Name = **RegoUniversity**
- Course **Description**
- 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@regoconsulting.com

Website
www.regouniversity.com

Continue to Get Resources and Stay Connected

1. Use RegoXchange.com for instructions and how-tos.
2. Talk with your account managers and your Rego consultants.
3. Connect with each other and Clarity experts at RegoGroups.com.
4. Sign up for webinars and join in-person Rego groups near you through at RegoConsulting.com
5. Join us for the next Rego University!