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SAN ANTONIO • 2026

Clarity by Design: Choosing the Right Modules and Configuration for Your Organization

Your Guides:
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Learning Objectives

By the end of this session, participants will:

Differentiate between key Clarity Modern UX modules (such as Roadmaps vs. Hierarchies and CITs vs. Projects) and identify the appropriate use case for each.

Evaluate OOTB vs. customization trade-offs — Assess when to stick with out-of-the-box (OOTB) attributes, views, and capabilities versus when customization is worth it.

Develop a practical approach for matching Modern UX module selection and customization depth to an organization's unique processes, balancing standardization with flexibility.

Agenda

- Welcome and Objectives
- Definition of Customization
- Ideas and CITs
- Projects and CITs
- Roadmaps vs. Hierarchies
- Live Q&A / Scenario Workshop
- Wrap-up and Resources

Definition of Customization

Restricting the service to supported configurations helps ensure consistent security, stability, and maintainability for all clients.

NOT PERMITTED:

Application Customizations

- Custom Java Code
- JavaScript injection on HTML content
- Alterations to Clarity 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

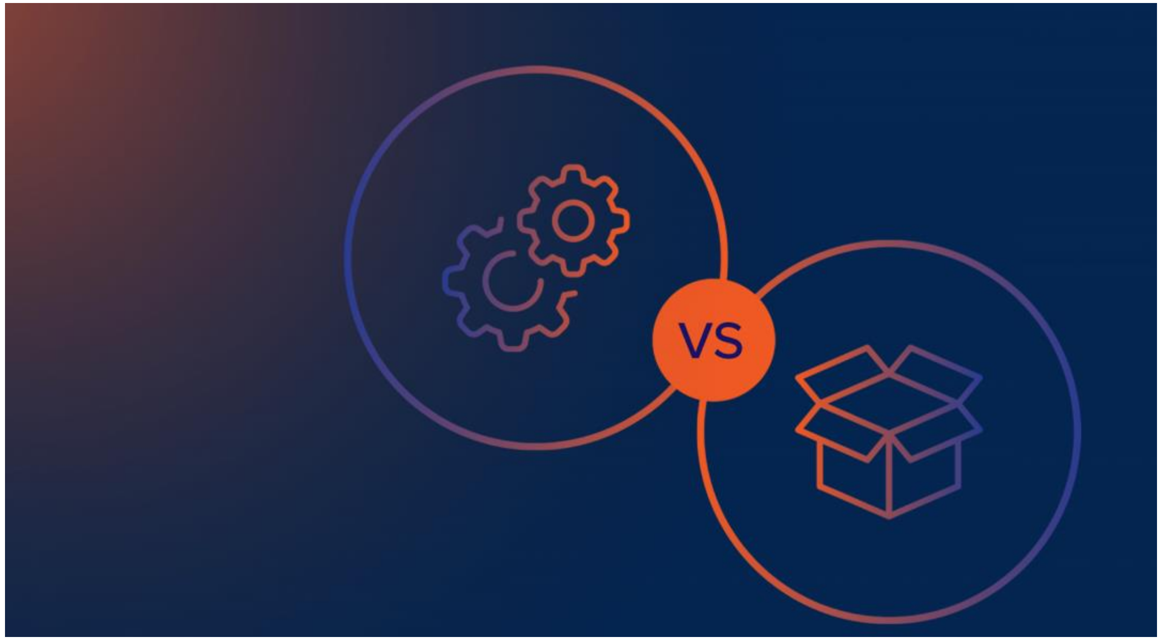
BUT WHY?

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

Open Mic: Out-of-the-Box vs. Custom Configurations

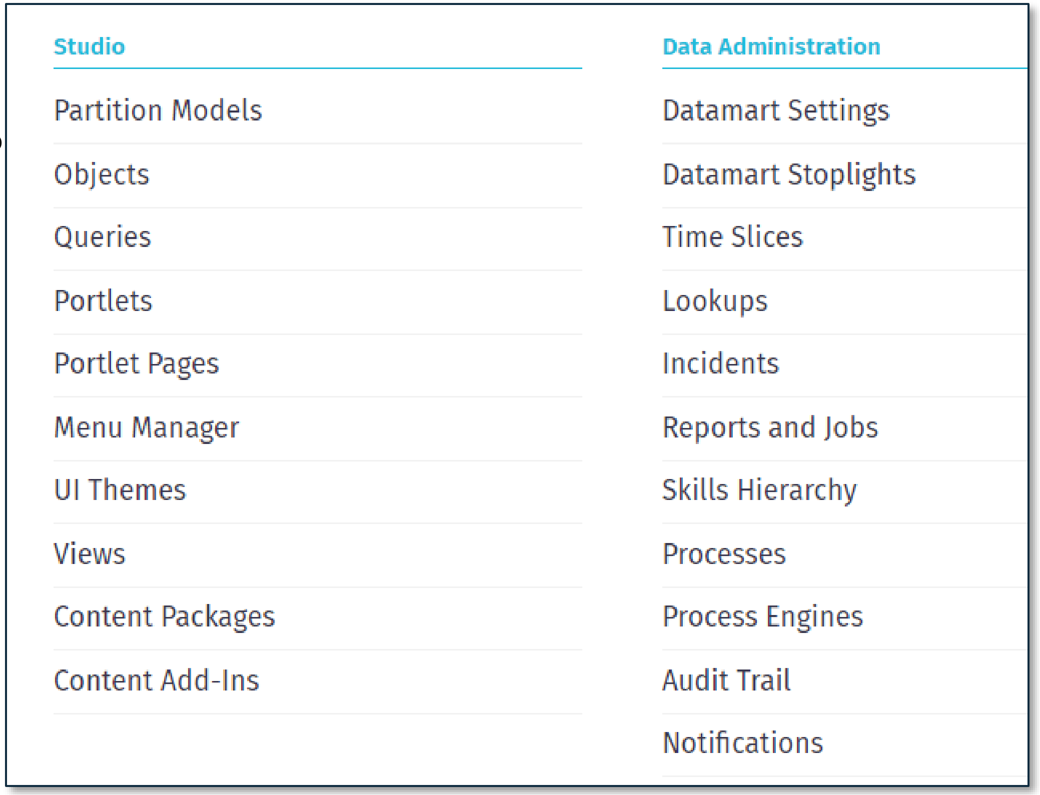
We commonly see customers utilizing custom configurations instead of Out-of-the-Box (OOTB) Clarity.

- 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 features?



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 of OOTB

Benefits of staying OOTB:

- Ongoing alignment with Broadcom's product roadmap
- Ability to quickly leverage RegoXchange and other add-in content
- 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 perfectly meet user requirements
- 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 your environment feels overly configured?

Use Cases

A practical look at various modules

The Clarity Landscape

- Modules in play and how they can solve for various use cases:
  - Ideas
  - Projects
  - CITs (Custom Investment Types)
  - Hierarchies
  - Roadmaps
  - Custom Objects
  - Staffing

Ideas vs. CITs

IDEAS

More common option. "Idea terminology required". View only licenses. Assess time entry needs.

VS

CIT

Requires some configuration and testing. Need to assess license utilization impact and time entry needs.

There's no official lean in either direction, though use of Ideas is still the most popular.

Project vs. CITs

PROJECT

HIERARCHY IS SIMPLE
Example two levels Program and Project.

SECURITY
Can be secured, but not fully isolated by object.

ADDITIONAL FEATURES
Task schedulers (MSP & OWB), Baselines, sub-projects within Tasks module.

LIMITED CONFIGURATION
Unable to change create form label “New Project.”

VS

CIT

COMPLEX HIERARCHY
A CIT can be created for each level.

SECURITY
CIT is isolated with dedicated data. Provide maximum security.

EASE OF ONBOARDING
Each division can have its own dedicated object.

FEATURES ≠ TO PROJECTS
Not compatible with task schedulers, no baselines, cannot add CIT records as subprojects within Tasks module.

Project vs. CIT – Part 1

CITs and the Project Object are nearly identical in terms of functionality, with the few exceptions noted below.

When the organization presents a requirement to track and manage work at multiple levels (e.g., initiatives, programs, or workstreams), should they be created using a stand-alone CIT or as a variation of the Project object?

Feature \ Requirement	Project Object	CIT
Configurable Object Name	Some relabeling options, but - generally - the object name cannot be changed. Impacts the create form.	Can be named per organization's requirements.
Navigation	Stock icon in left navigation bar. Users trained that other investments (e.g., programs) are accessed through the Project link.	Configured page and icon can be added to left navigation bar in System Settings. Otherwise, each CIT can be accessed as tile in CIT menu.
Available Modules	All.	No Document Manager or Baselines
Dependency Management	No limitations.	Tasks can be included in dependencies, but CITs cannot be included as subprojects. Task scheduler is not available, e.g., MSP.

Project vs. CIT – Part 2

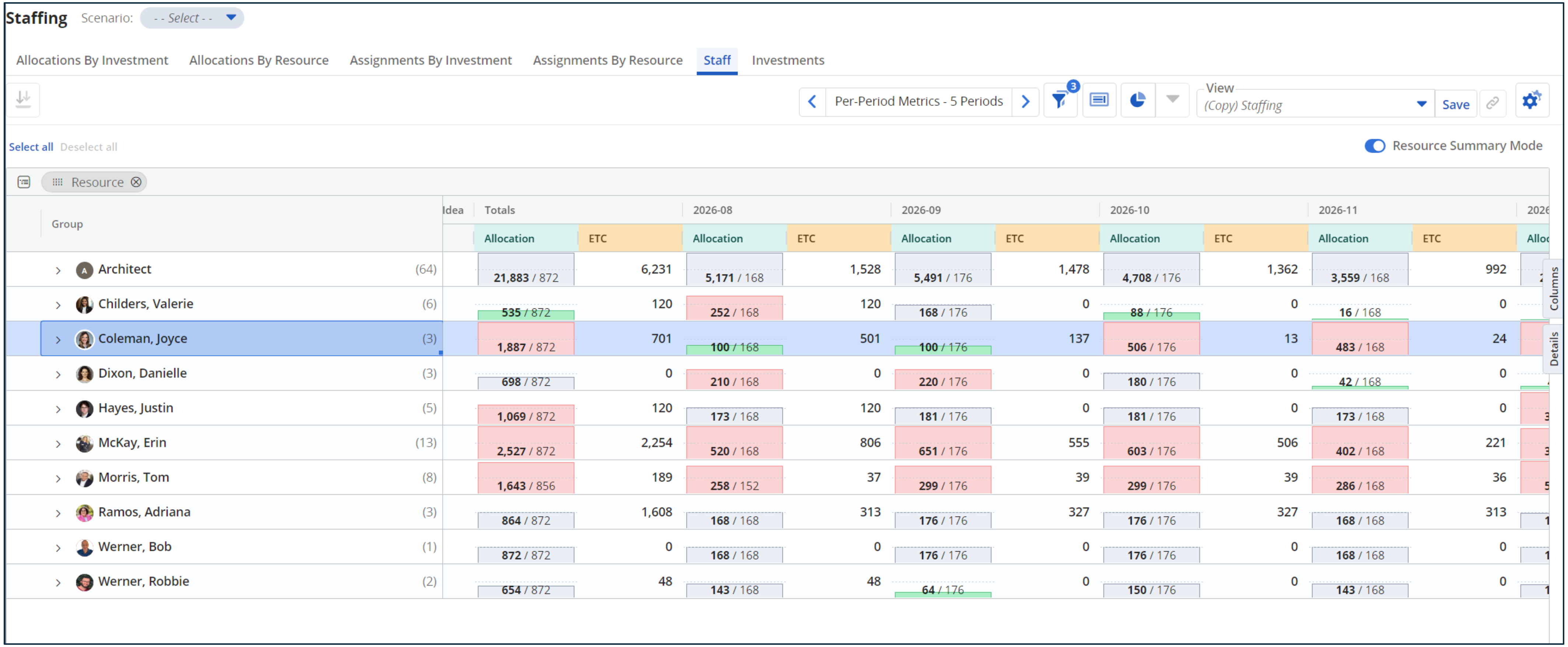
CITs and the Project Object are nearly identical in terms of functionality, with the few exceptions noted below.

When the organization presents a requirement to track and manage work at multiple levels (e.g., initiatives, programs, or workstreams), should they be created using a stand-alone CIT or as a variation of the Project object?

Feature \ Requirement	Project Object	CIT
Security	OBS security or business rules required to lock or hide various data.	Each CIT has independent security model with navigate, view, and edit rights.
Aggregate Visibility	All levels can be presented via saved views with investment-level aggregation directly from the Project list view.	Requires the creation and maintenance of one or more Hierarchies.
Importing to Hierarchy and Roadmap	Manual and User defined filters available with additional ability to schedule syncing.	Manual and User defined filters available with additional ability to schedule syncing.
Object Configuration in Hierarchy and Roadmap	Single card configuration for project object.	Each CIT card can be configured independently (each object can have its own configuration).
Intake Source	Stock conversion available.	Stock conversion available.

Staffing

Ability to view resource capacity and demand.

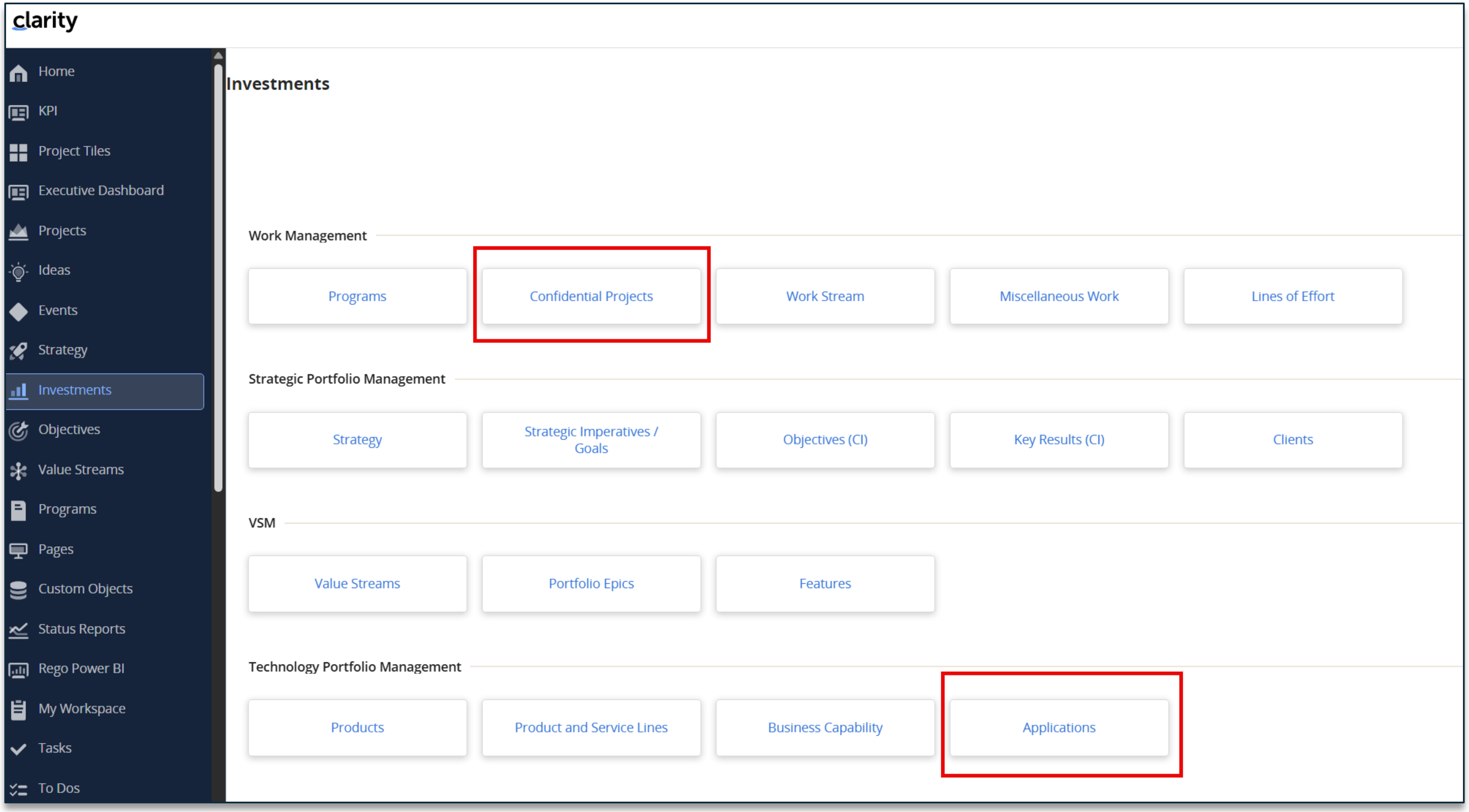


Group		Idea	Totals Allocation	Totals ETC	2026-08 Allocation	2026-08 ETC	2026-09 Allocation	2026-09 ETC	2026-10 Allocation	2026-10 ETC	2026-11 Allocation	2026-11 ETC
Architect	(64)		21,883 / 872	6,231	5,171 / 168	1,528	5,491 / 176	1,478	4,708 / 176	1,362	3,559 / 168	992
Childers, Valerie	(6)		535 / 872	120	252 / 168	120	168 / 176	0	88 / 176	0	16 / 168	0
Coleman, Joyce	(3)		1,887 / 872	701	100 / 168	501	100 / 176	137	506 / 176	13	483 / 168	24
Dixon, Danielle	(3)		698 / 872	0	210 / 168	0	220 / 176	0	180 / 176	0	42 / 168	0
Hayes, Justin	(5)		1,069 / 872	120	173 / 168	120	181 / 176	0	181 / 176	0	173 / 168	0
McKay, Erin	(13)		2,527 / 872	2,254	520 / 168	806	651 / 176	555	603 / 176	506	402 / 168	221
Morris, Tom	(8)		1,643 / 856	189	258 / 152	37	299 / 176	39	299 / 176	39	286 / 168	36
Ramos, Adriana	(3)		864 / 872	1,608	168 / 168	313	176 / 176	327	176 / 176	327	168 / 168	313
Werner, Bob	(1)		872 / 872	0	168 / 168	0	176 / 176	0	176 / 176	0	168 / 168	0
Werner, Robbie	(2)		654 / 872	48	143 / 168	48	64 / 176	0	150 / 176	0	143 / 168	0

Note: New in 16.4.3 the ability to add a channel to a report/dashboard.

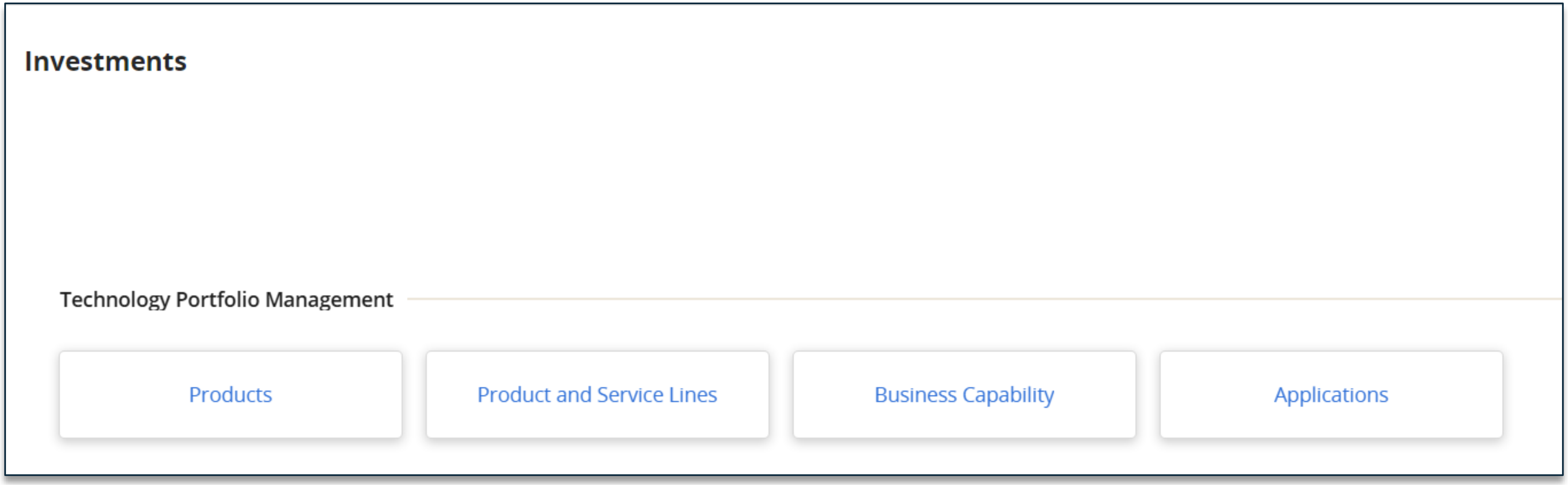
Applications, Mergers and Acquisitions, Confidential Projects

- CITs provide a way to manage non-project work.
- CITs can be used to manage Confidential Projects.
- CITs can be used to store the organization list of applications. Because CITs offer the Staff module can use it to provide visibility into which resources support various applications.



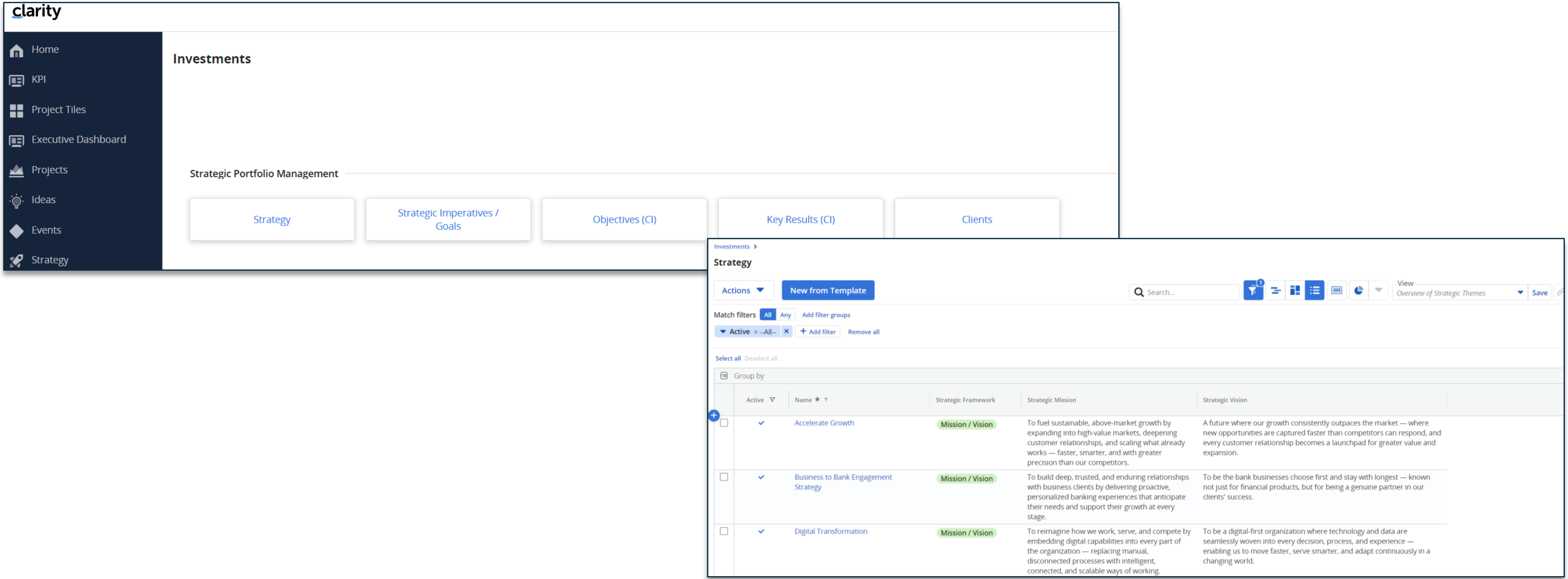
Technology Portfolio Mgt – Products, Service Lines, Business Capabilities

Utilize CITs to manage the list of Products, Project and Service Lines, Business Capabilities, and Applications.

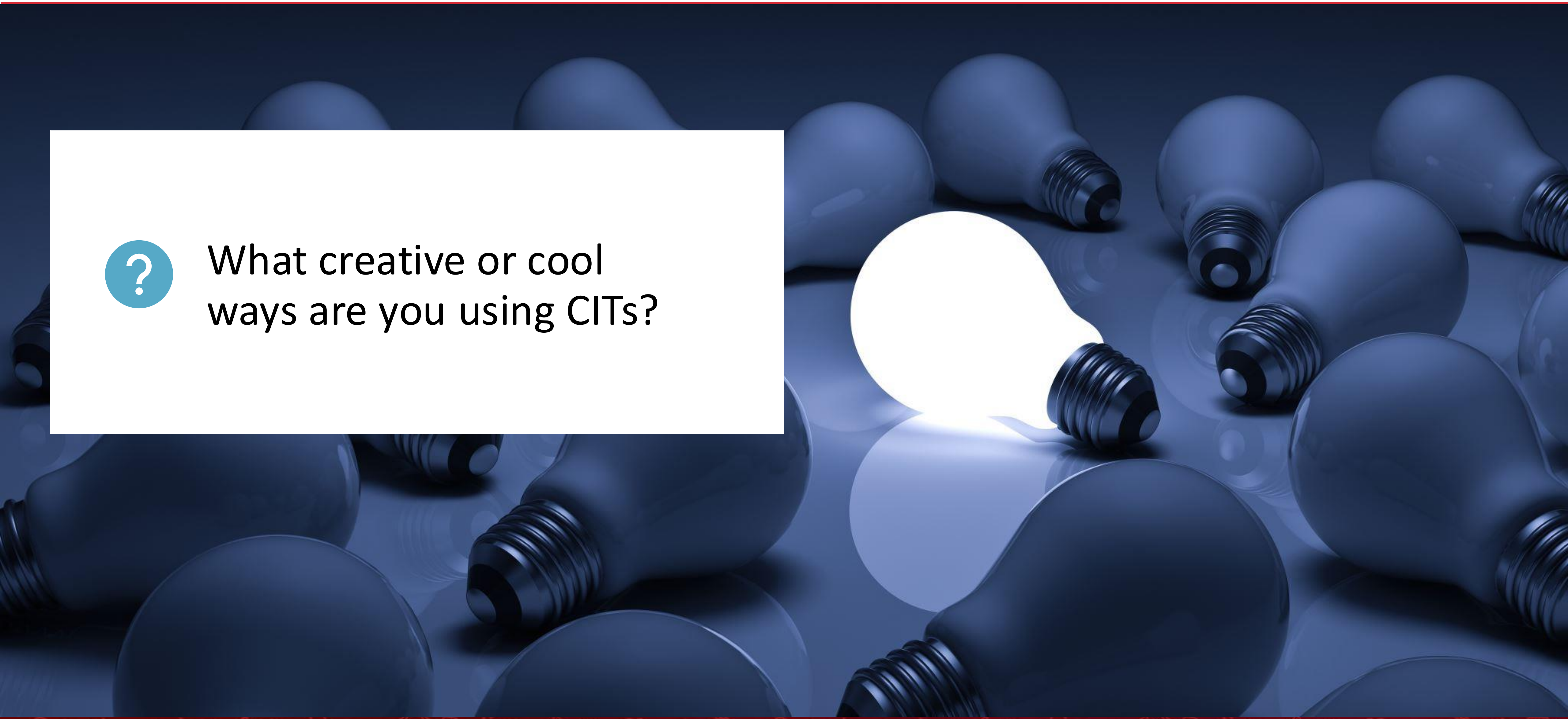


SPM: Strategy, Goals, Objectives

- Utilize CITs to manage the list of Strategies, Goals, Objectives, and Key Results.
- Recommend reviewing the OOTB Objectives prior to implementing the CIT approach.



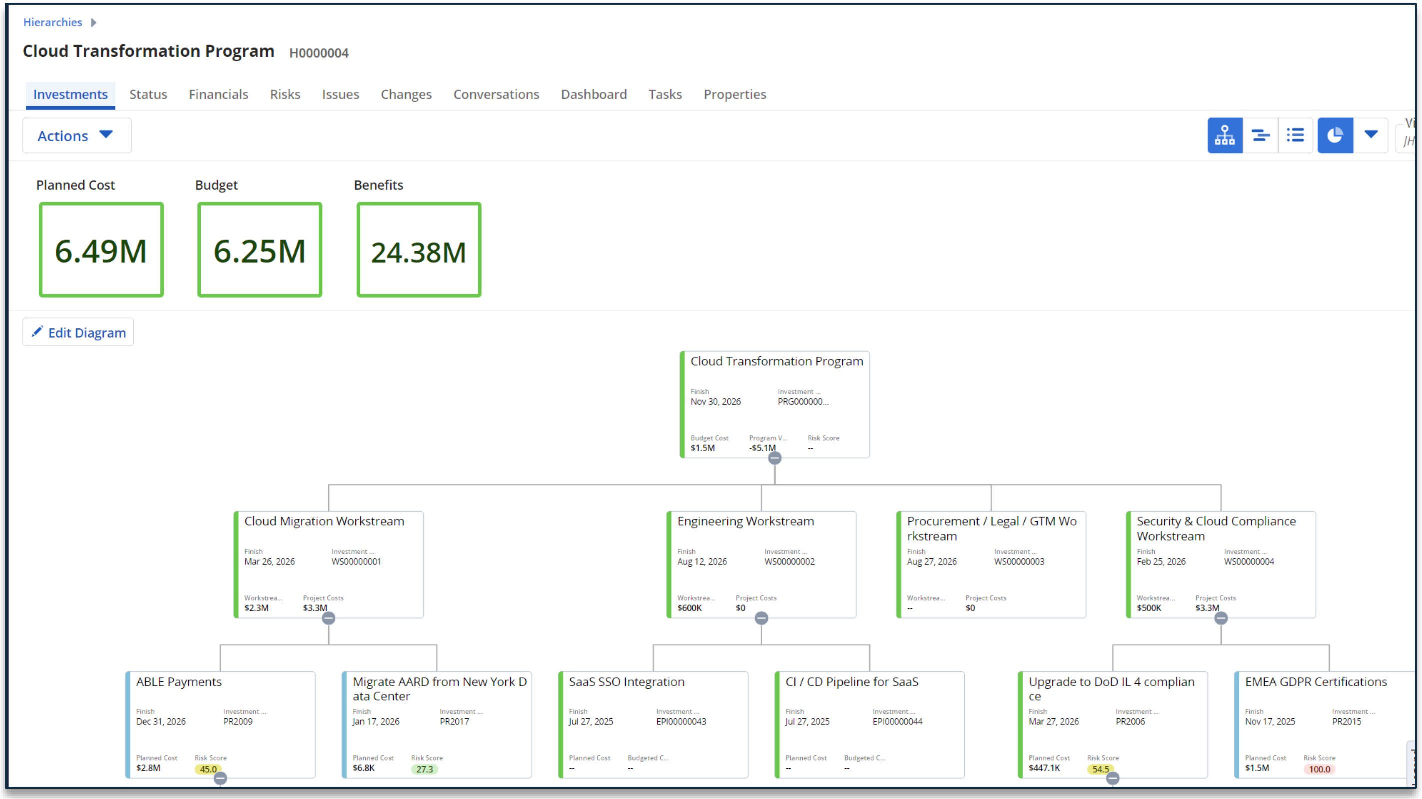
Open Mic



? What creative or cool ways are you using CITs?

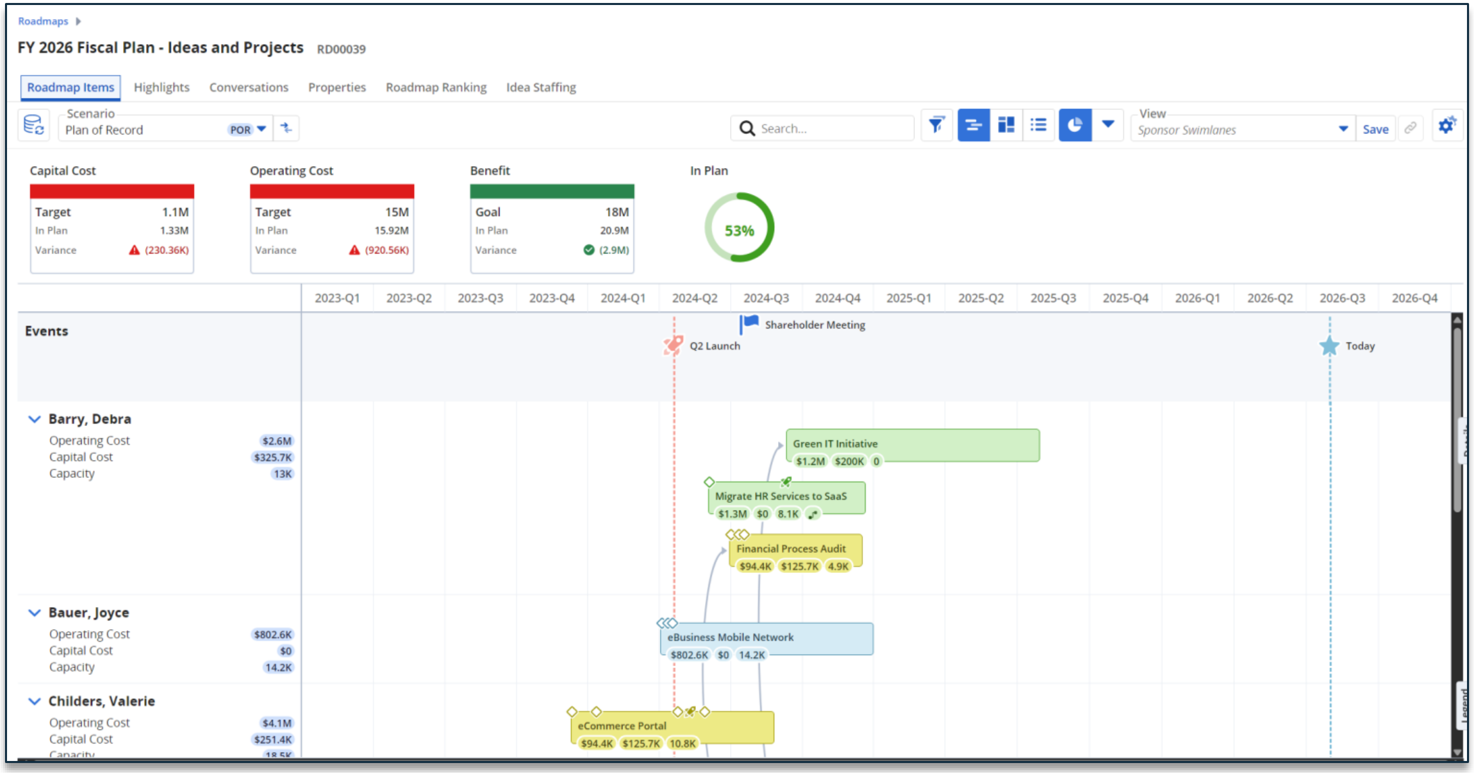
Hierarchies

- Rollup reporting and strategic alignment visualization
- Visualize Programs w/Projects
- Portfolio Management
  - Risks, Issues, Status Reports, etc.



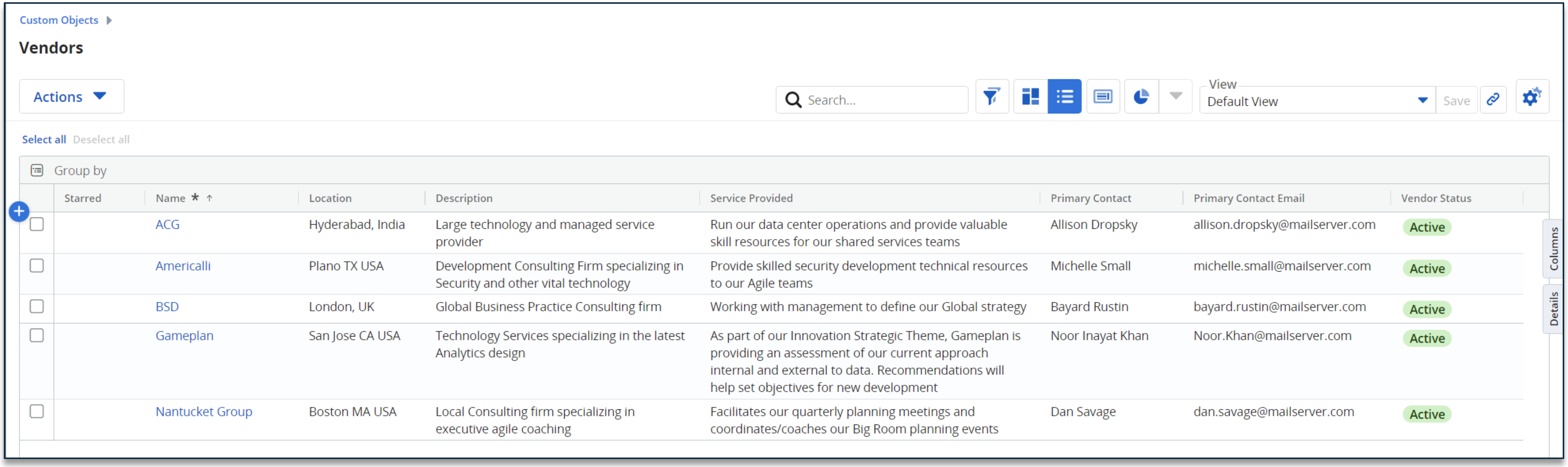
Roadmaps

- Top-down strategic planning
- Product line / portfolio-level timeline visualization
- Prioritization and scenario planning
- Linking strategy to execution
- Product-focused/agile planning (vs. traditional project planning)



Custom Objects

Used to manage a list of items instead of managing a static lookup, e.g., vendors, applications, office locations, etc.



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 sample reports and portlets. Deviating from these can lead you unnecessarily down a path of custom reporting.

- Where at all possible, leverage OOTB attributes.

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 an Investment, align as best as possible to the standard set of sections for core data (Details, Financials, Stakeholders, Settings, etc.).
- Utilize the "Subtab" functionality to keep the properties page clean.
- Configure the Blueprint to display and hide modules, sections, and fields when necessary to make data relevant to the users at the right time.
- Add widgets and conditional formatting to provide quicker insights into data that requires attention.

Rego Recommendations: Functionality

- Create your own security groups and roles.
- Leverage the OOTB sub-objects when possible (financial plans, risks, issues, status, etc.).
- 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.

Rego Recommendations: Notifications and Workflows

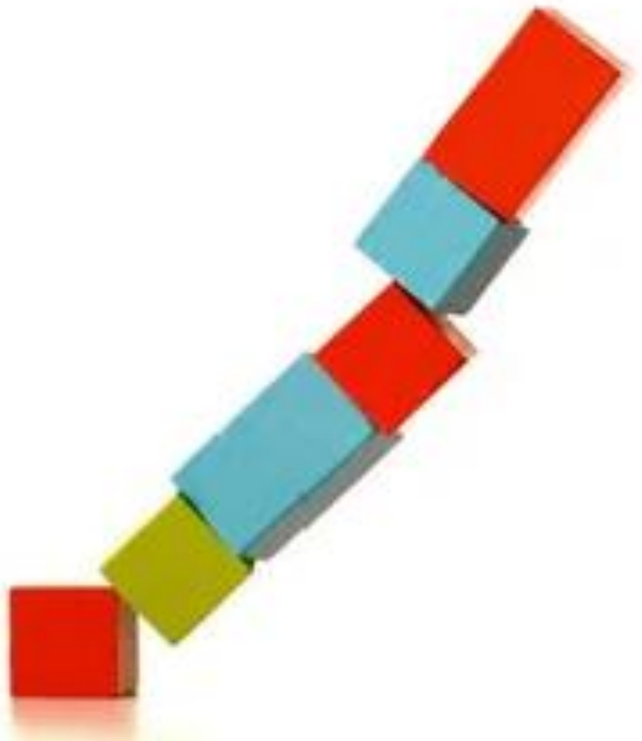
Utilize the OOTB notifications and associated emails for basic communications or reminders. However, modify the wording of those default notifications to be more intuitive or process-specific.

Create custom notification or reminder 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?
- How did you address their feedback/concerns?



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.
- Stay up to date with new functionality in the quarterly releases.
- Review your system on a defined cadence to identify areas of improvement and simplification.
- Chances are that somewhere, someone has done it before. Ask!

Questions?

Survey

Please take a few moments to fill out the class survey.

Your feedback is extremely important for future events.

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