knowledge17

WORK at LIGHTSPEED™

Custom Development Avoiding the Pitfalls

DANA AFT
Intercontinental Exchange (ICE)

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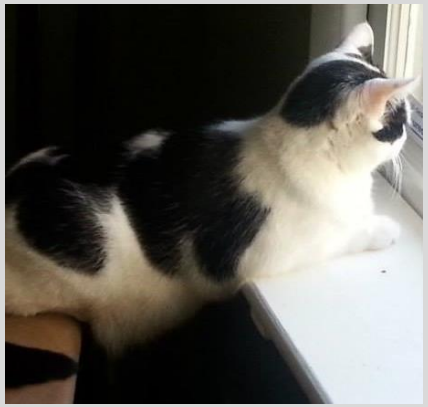
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Agenda

- Introduction
- Project Insight
- Lessons Learned
- Q&A

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Speaker Introduction



NAME: Dana Aft

EXPERTISE: Web Development

COMPANY: Intercontinental Exchange (ICE)



EDUCATION: Psychology, Statistics, , Business, CIS

CAREER: Industrial Engineer, Entrepreneur, Software Developer

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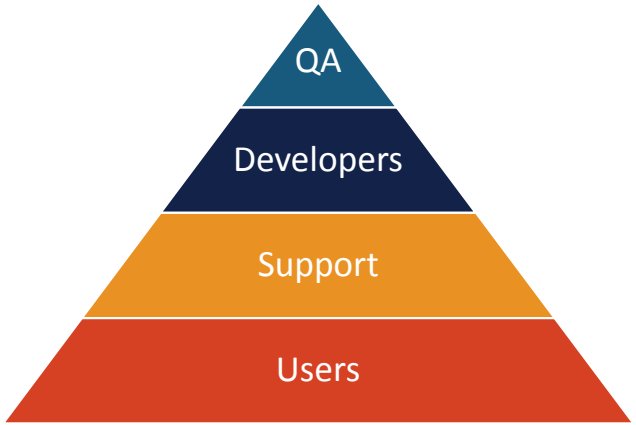
My Company

NAME: Intercontinental Exchange

IMPLEMENTED: 2009

DATABASE: Oracle

NOW EXPERIENCE: 2 years Experience, Eureka – Helsinki,
The “UI Person”

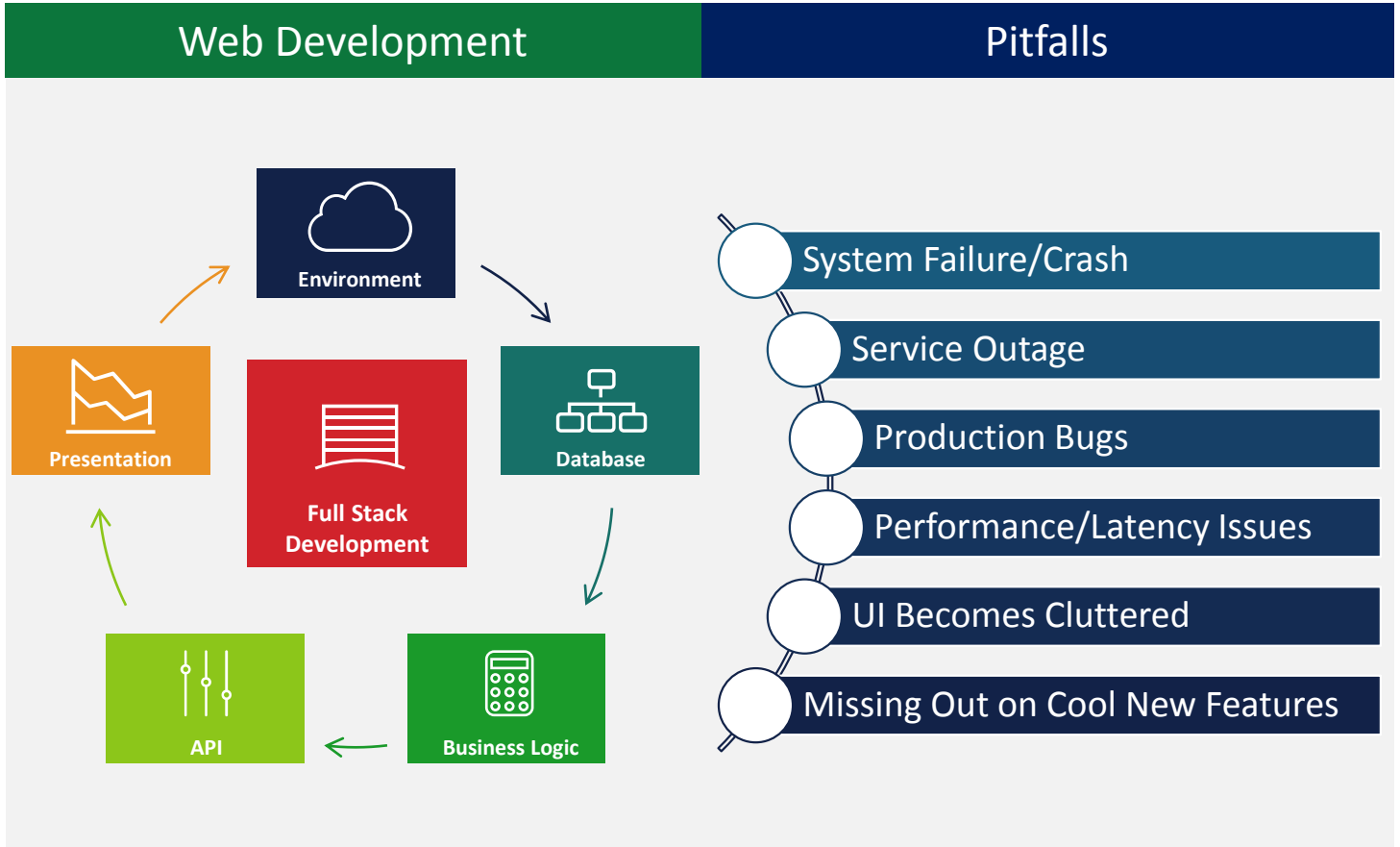


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Overview

- 2010
  - Flash!
  - No Bootstrap
  - LAMP/WAMP



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Project Insight

CUSTOM: Visitor Application

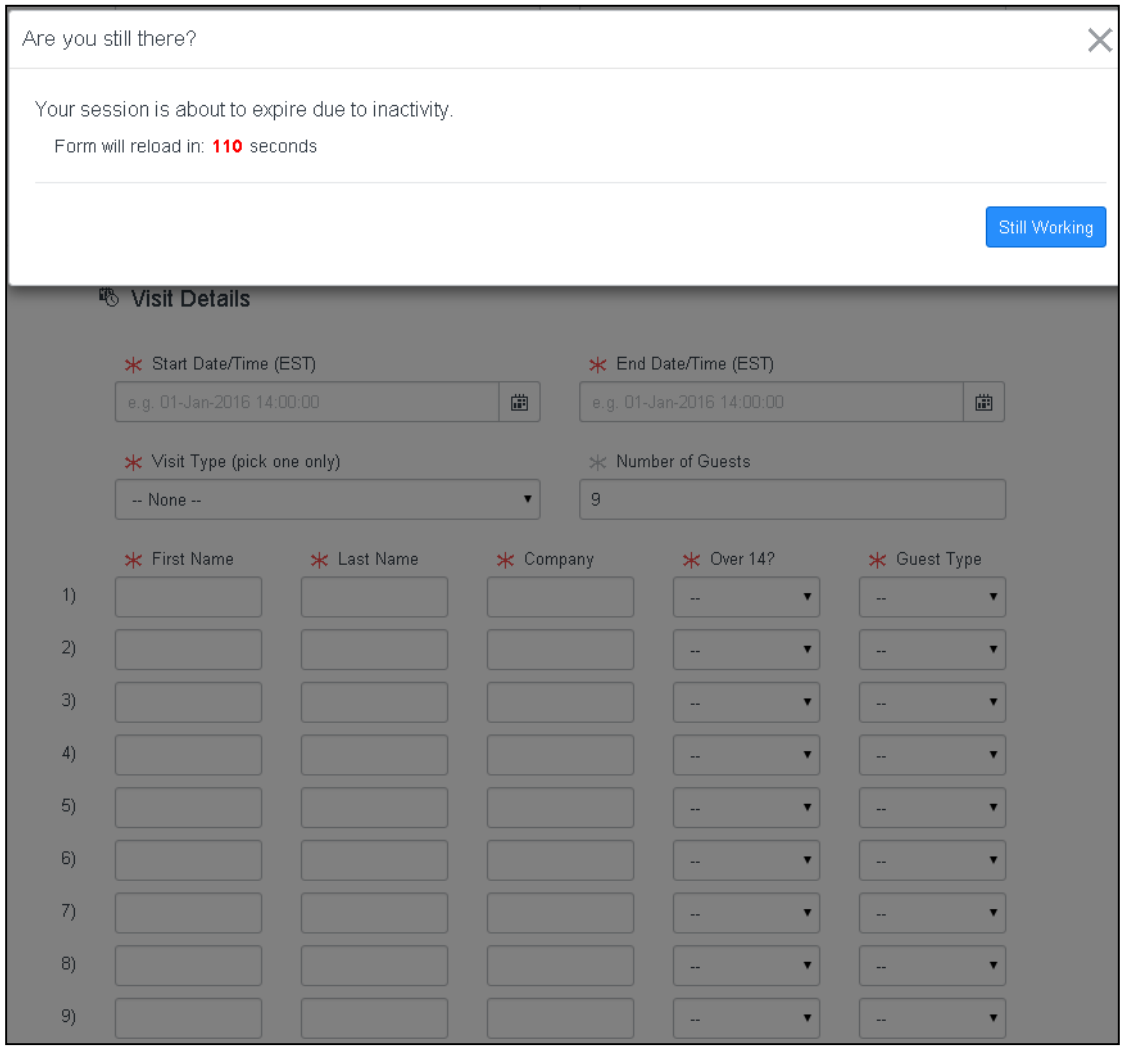
- OVERVIEW
  - Guest data entry
  - Finalized guest list delivered to security
    - Other changes communicated as necessary
  - Notifications to Escort
    - Phone calls & Emails

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Project Insight

CUSTOM: Visitor Application

- PUBLIC (KIOSK) FORM
  - Features:
    - Timeout Functionality
    - One Step Guest Entry
    - Confirmation Email
  - ServiceNow Components:
    - Jelly, UI Macros, & jQuery
    - Public Pages & Script Includes

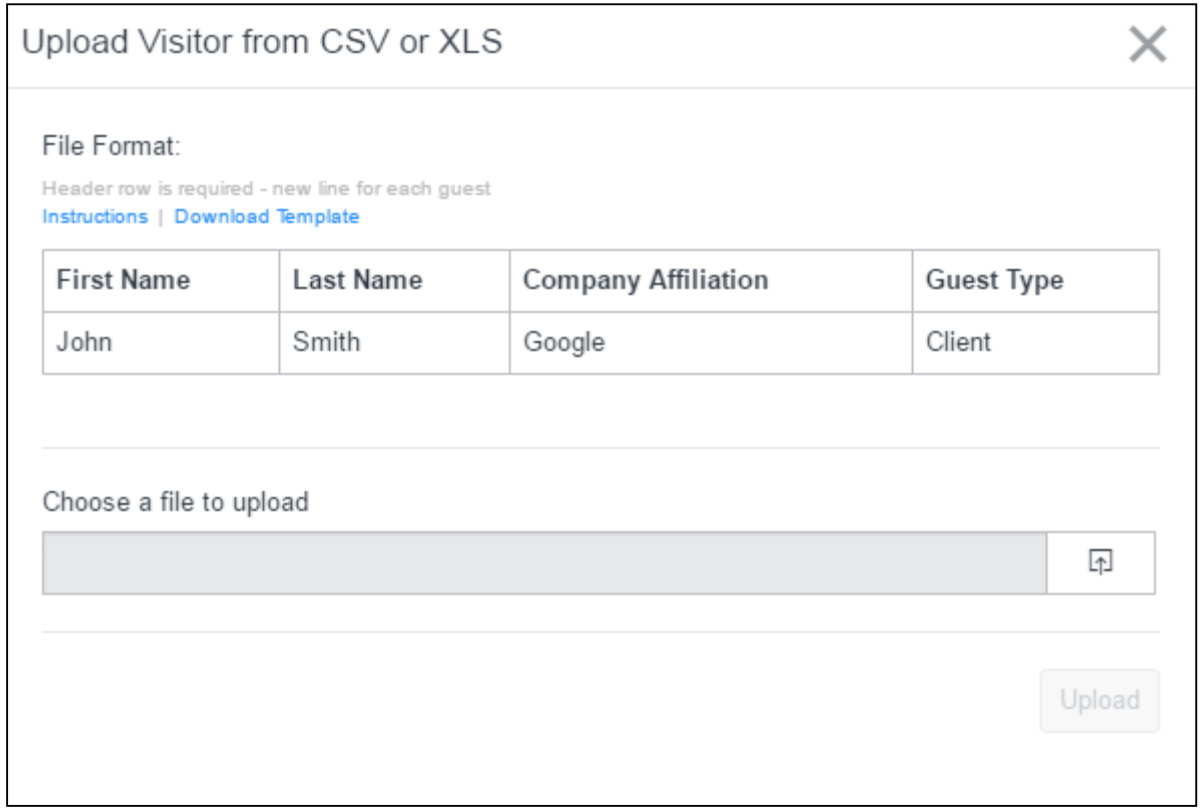


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Project Insight

CUSTOM: Visitor Application

- INTERNAL REQUESTS
  - Features:
    - One Step Guest Entry
    - Accessible from Service Catalog
    - Guest Upload
  - ServiceNow Components:
    - Embedded Lists
    - Record Producers
    - Automated Upload/Data Sources



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Project Insight

CUSTOM: Visitor Application

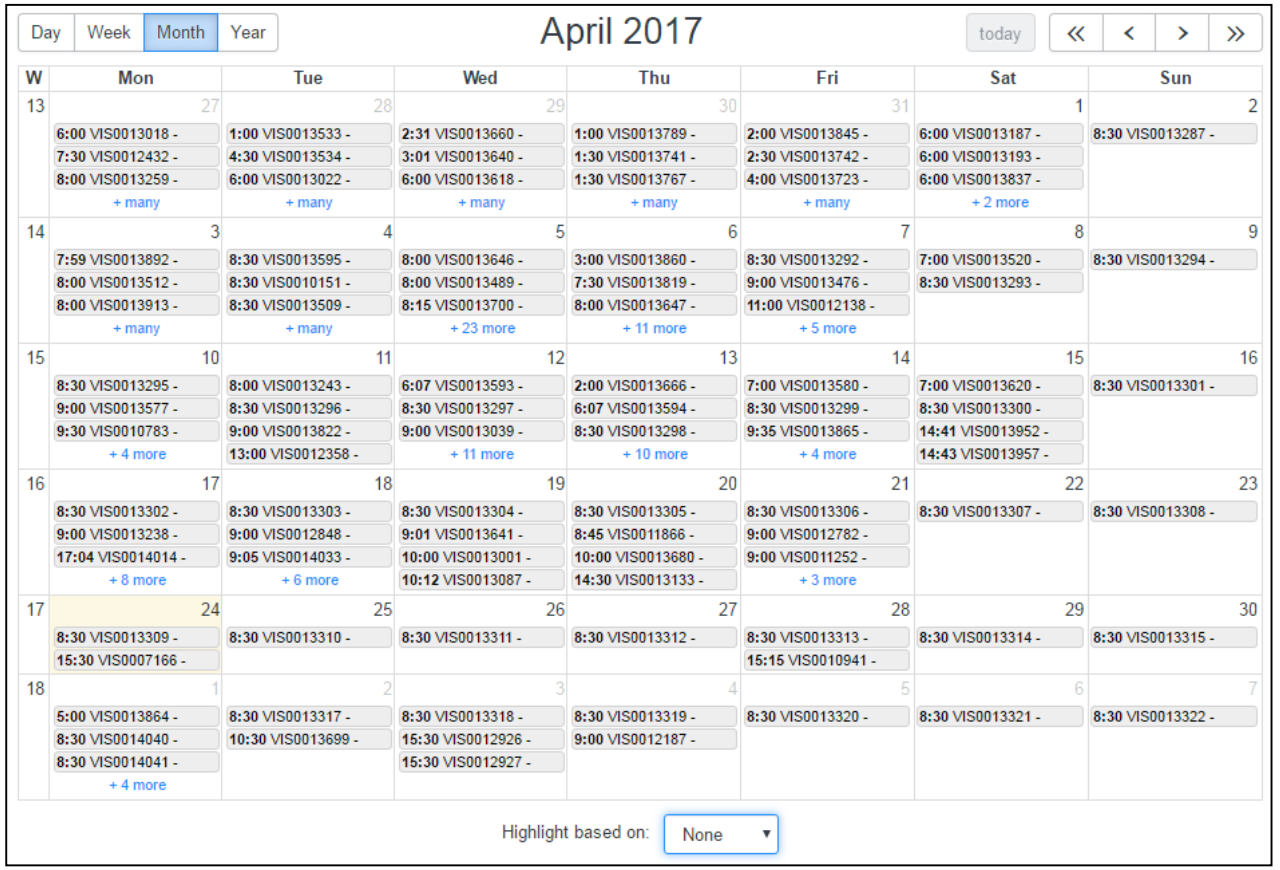
- OTHER COMPONENTS
  - Roles
    - Approval Groups
    - Security Groups
  - Notifications
    - Emails (External & Internal)
    - SMS/Text Messages (Internal)
  - UI Actions
    - Check In (and “Undo”)
    - Check Out
  - Automatically Generated Requests
    - New Hires

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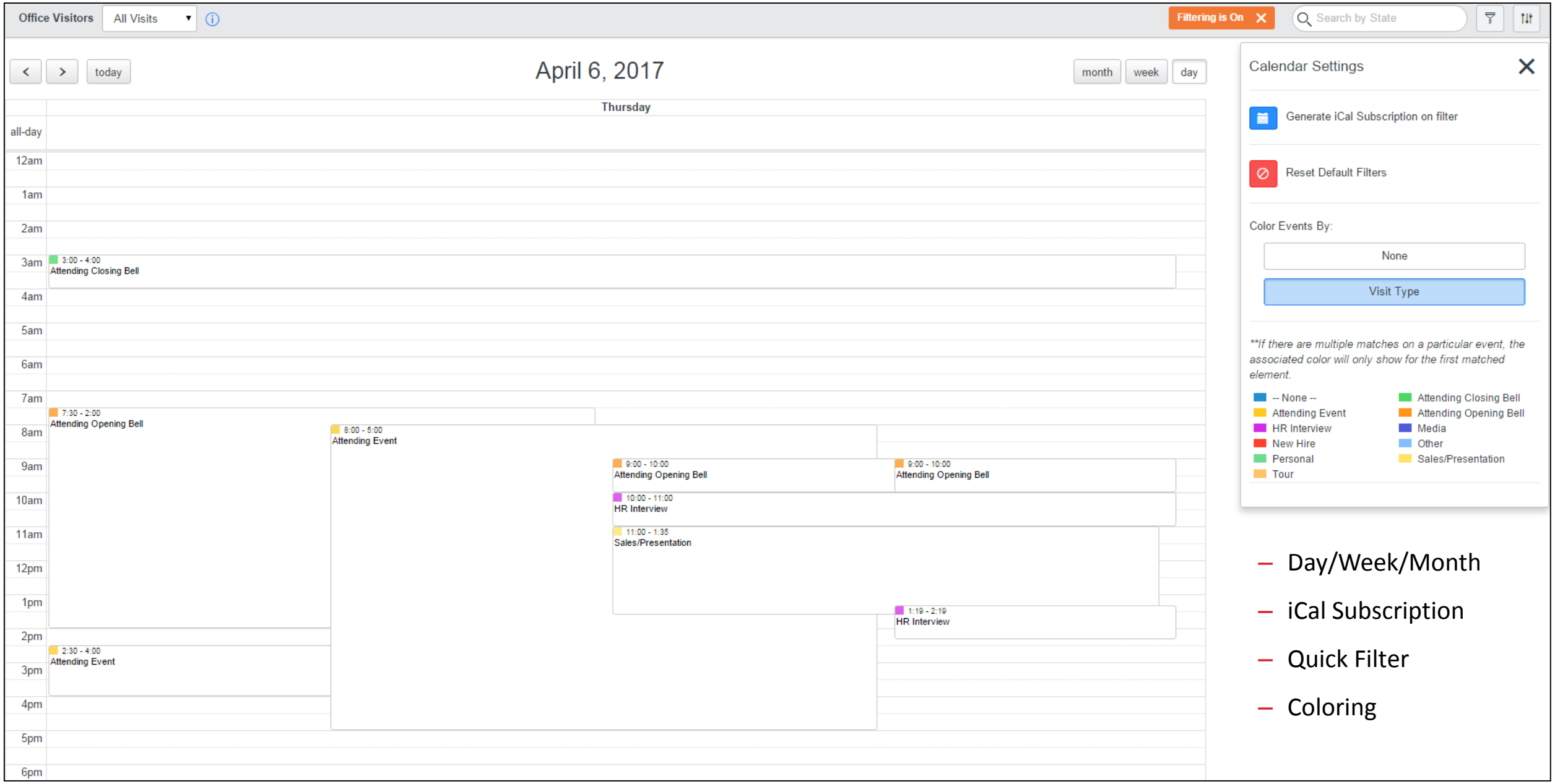
Project Insight

CUSTOM: Calendar Application

- ORIGINAL CAPABILITIES
  - Day/week/month
  - iCal Subscription
  - Filtering Capability
- ADDITIONAL REQUIREMENTS
  - Color by (xyz)
  - All day & multi-day events



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- Day/Week/Month
- iCal Subscription
- Quick Filter
- Coloring

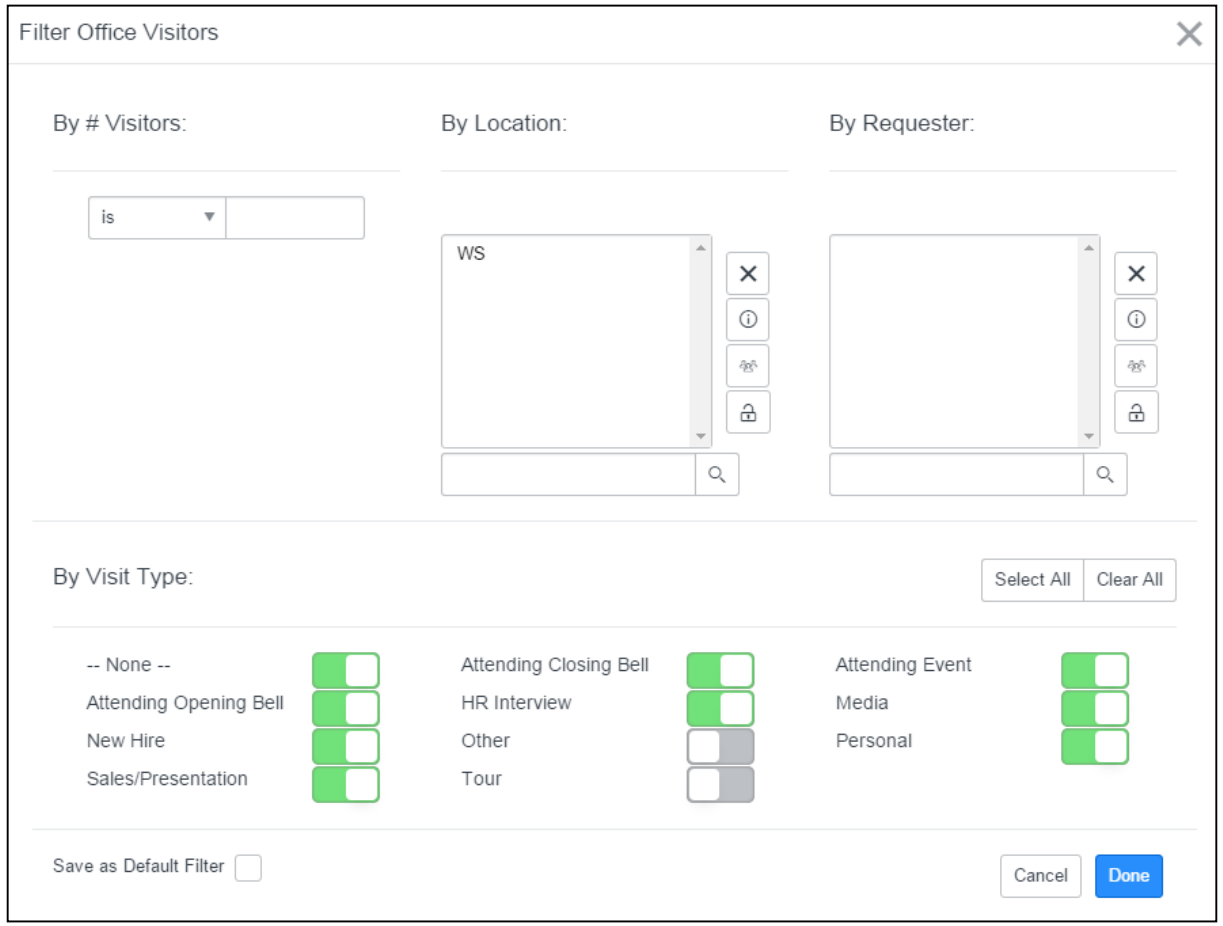
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Project Insight

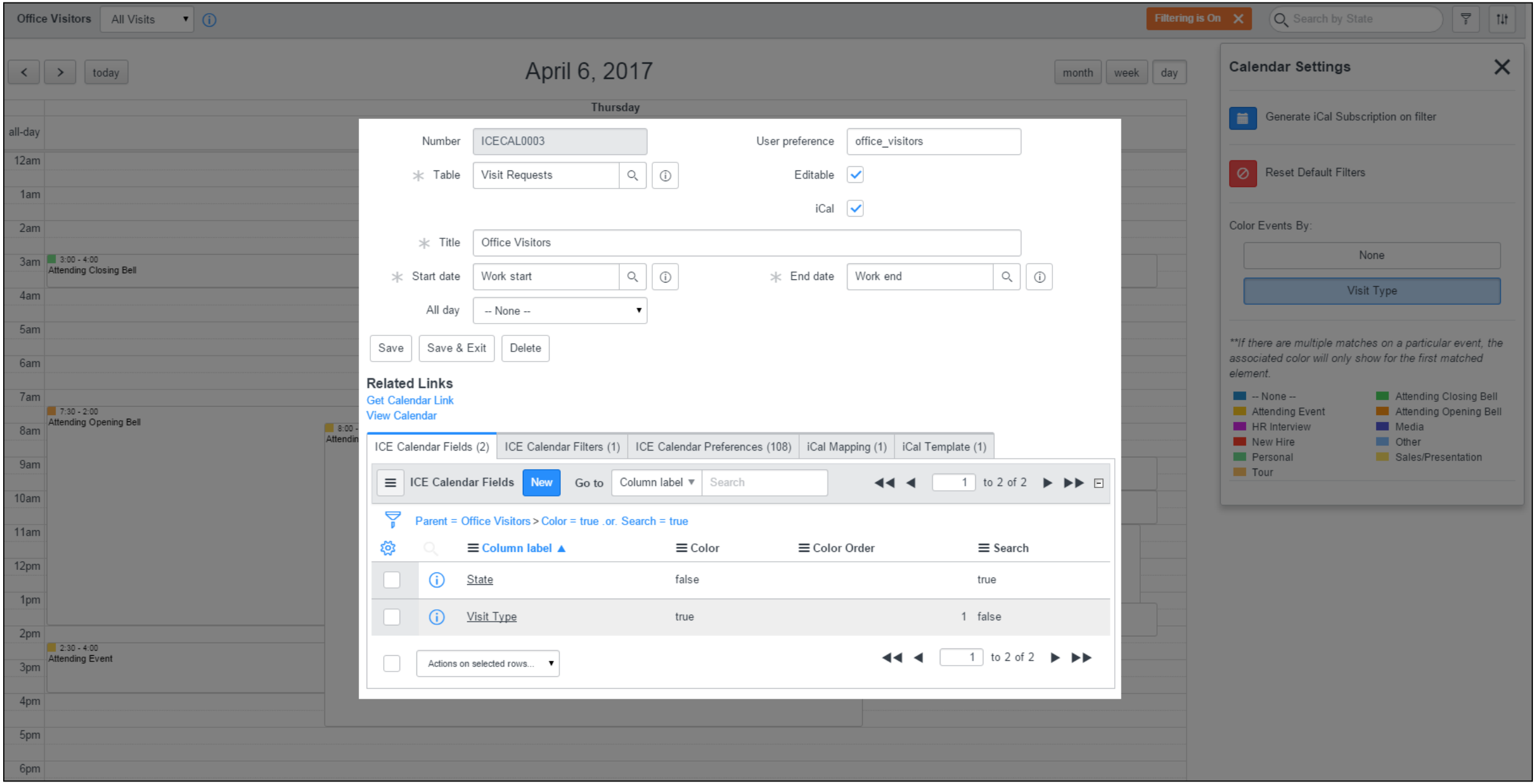
CUSTOM: Calendar Application

- OTHER COMPONENTS
  - Advanced Filtering
  - Saved User Preferences
  - Preset Defaults

- But…can it work for all tables?



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Project Insight

OOB: Notifications

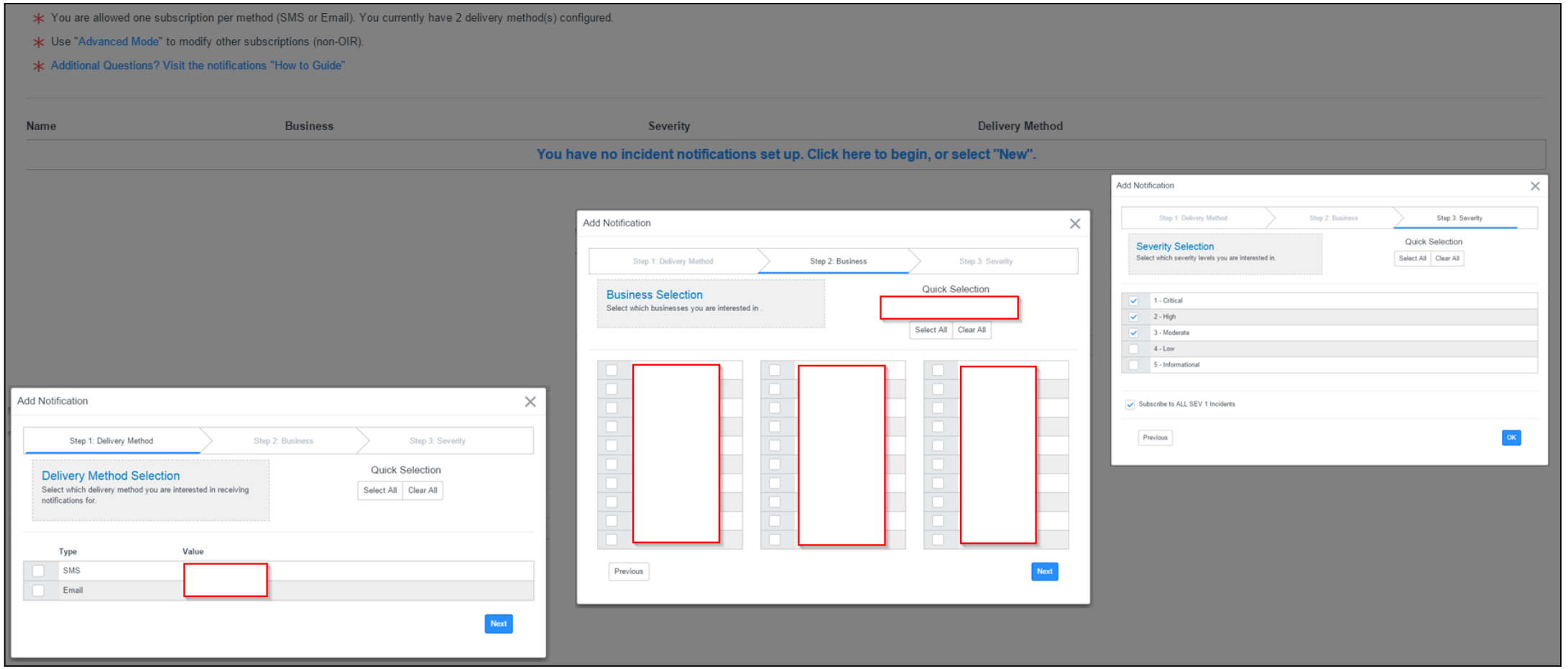
- PURPOSE
  - Subscriptions don't work if they're not set up properly



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Project Insight

OOB: Notifications



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Project Insight

OOB: Project Management

- OVERVIEW
  - Templating
  - Fake Delete
  - Task Status
- MODIFIED OOB CODE
  - Client Scripts
  - ACLs
  - Form Layouts
  - UI Actions/Policies
  - Script Includes
  - Business Rules

Deleting OOB Code

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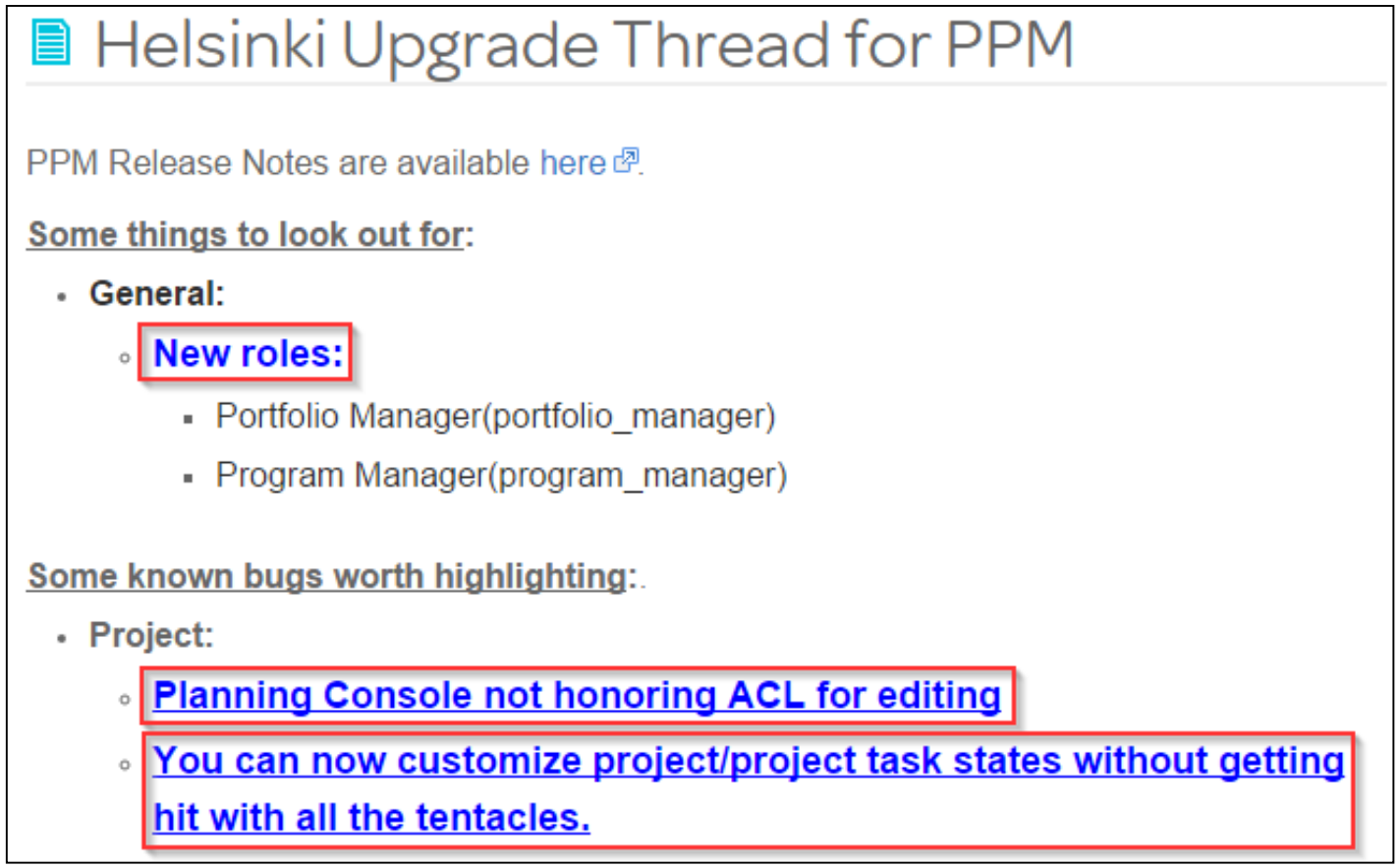
Project Insight

OOB: Project Management

Why

Because we customized…

Because we didn't customize…



Helsinki Upgrade Thread for PPM

PPM Release Notes are available here.

Some things to look out for:

- **General:**
  - **New roles:**
    - Portfolio Manager(portfolio_manager)
    - Program Manager(program_manager)

Some known bugs worth highlighting:.

- **Project:**
  - **Planning Console not honoring ACL for editing**
  - **You can now customize project/project task states without getting hit with all the tentacles.**

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Lessons Learned

CUSTOM DEVELOPMENT: Avoiding the Pitfalls

Upgrading

- All hands on deck – it's go time!
- Document skipped logs

Control Your Data

- UI/Views/Forms
- Permissions & Groups
- Archiving & Database Schema

Early Adoption

- The early bird catches the "worm"
- Get a developer instance
- Add (extend) vs. modify

Realistic Expectations…

- Training your User Base
- Developer Skillset

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Q & A

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Thank You

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