regoUniversity

NASHVILLE • 2022

Clarity – Agile Integration | Bi-Modal IT

Your Guides:

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Introductions

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

Agenda

- Agile Journey
- Tools for Integrating
  - The Rego Way
- CA’s OOTB Rally Connector
- Rego’s Rally Connector

Part I:
Why Integrate

Why An Agile Integration?

- KEY: Understand your business case
  - No integration will solve an undefined business case
  - Be prepared to make concessions
- For Those That Have or Plan Agile Integrations:
  - Why?
  - Do you want data for capitalization?
  - Do you want to monitor data for progress?
  - Do you want consolidated reporting?

Why – Capitalization

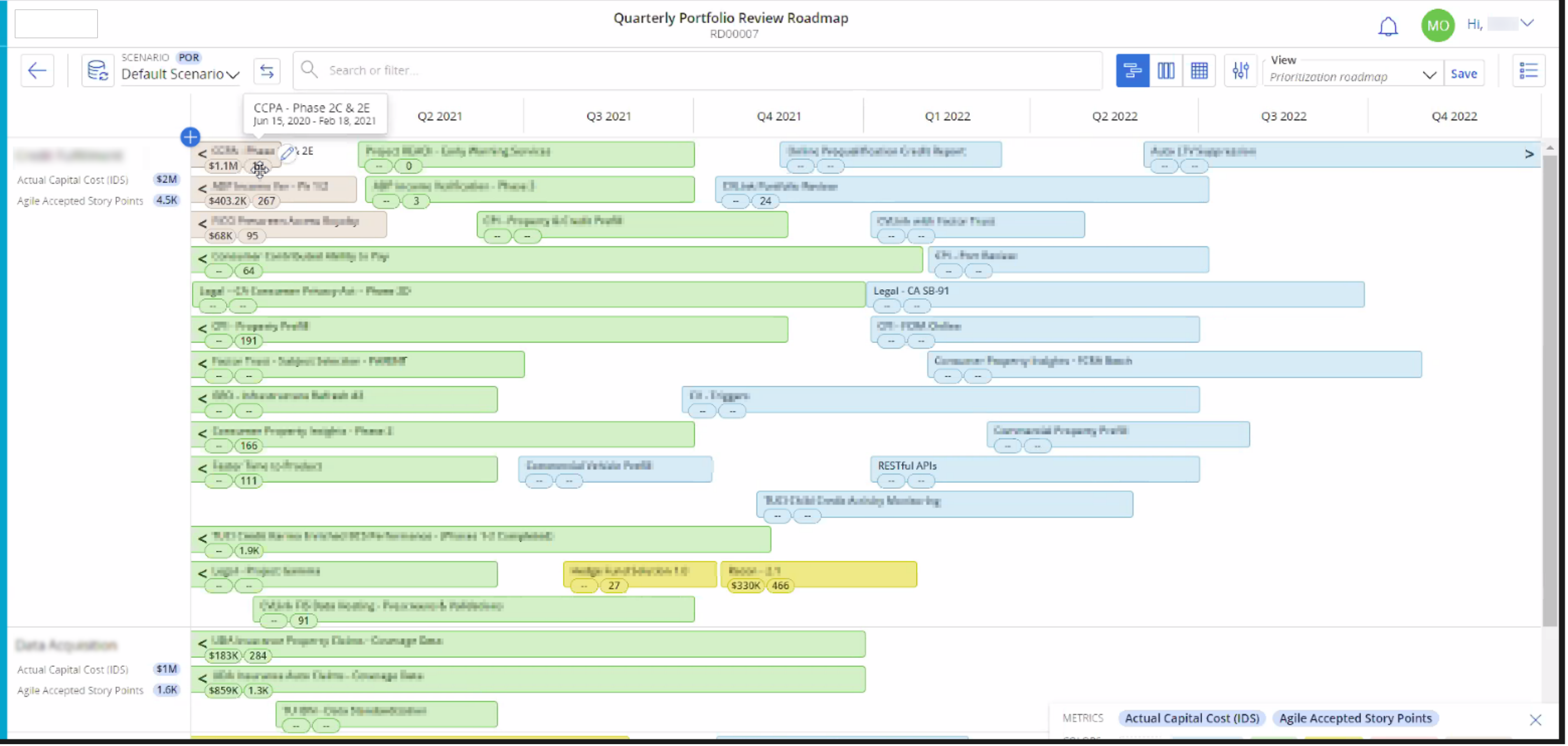
- At what level of detail do you want to capitalize time?
- Highest level – bucket task
  - Single, generic task per project
- Middle level – feature or story (Rego Recommended)
  - Time rolls up in your Agile tool to a feature or story. Import those as tasks
  - Strikes a good balance between getting required financial data and monitor at projects at a high level
- Lowest level – all tasks
  - As time is logged on Agile tasks, those are imported one-one.
  - Too much detail!

Why – Monitor Data Progress

- How healthy is my Agile project?

Project Sprint Hierarchy

Project / Spint / Story		Finish Date	Total Points	Points Complete	Points Remaining		% Complete
Web Based Trading		11/22/16	98	48	50		49%
Backlog		11/22/16	14	3	11		21%
As a customer, the checkout process should be easy and must accept 3 forms of payment -- cash, credit, paypal		11/22/16	3	3	0		100%
Create new user		11/22/16	3	0	3		0%
Modify user rights		11/22/16	8	0	8		0%
Sprint 1 (WBT)		9/30/16	55	26	29		47%
A user needs to create a spider chart		9/30/16	5	0	5		0%
A user needs to create column charts		9/30/16	5	5	0		100%
As a user I would like to export reports		9/30/16	4	0	4		0%
Change user rights		9/30/16	5	5	0		100%
Create an option trade		9/30/16	3	3	0		100%
Delete user		9/30/16	3	0	3		0%
Make a stock trade		9/30/16	3	0	3		0%
Modify a stock trade		9/30/16	5	5	0		100%
Modify an option trade		9/30/16	3	3	0		100%
Modify user		9/30/16	8	0	8		0%
Recall a stock trade		9/30/16	3	0	3		0%
Recall an option trade		9/30/16	5	5	0		100%
Secure a new user		9/30/16	3	0	3		0%
Sprint 2		10/14/16	29	19	10		66%


Quarterly Portfolio Review Roadmap
RD00007
MO
Hi,
SCENARIO POR
Default Scenario
Search or filter...
View
Prioritization roadmap
Save
CCPA - Phase 2C & 2E
Jun 15, 2020 - Feb 18, 2021
Q2 2021
Q3 2021
Q4 2021
Q1 2022
Q2 2022
Q3 2022
Q4 2022
Actual Capital Cost (IDS) $2M
Agile Accepted Story Points 4.5K
$1.1M
$403.2K 267
$68K 95
64
Legal - CA SB-91
191
166
111
RESTful APIs
1.9K
27
$330K 466
91
Actual Capital Cost (IDS) $1M
Agile Accepted Story Points 1.6K
$183K 284
$859K 1.3K
METRICS
Actual Capital Cost (IDS)
Agile Accepted Story Points

Why – Consolidated Reporting

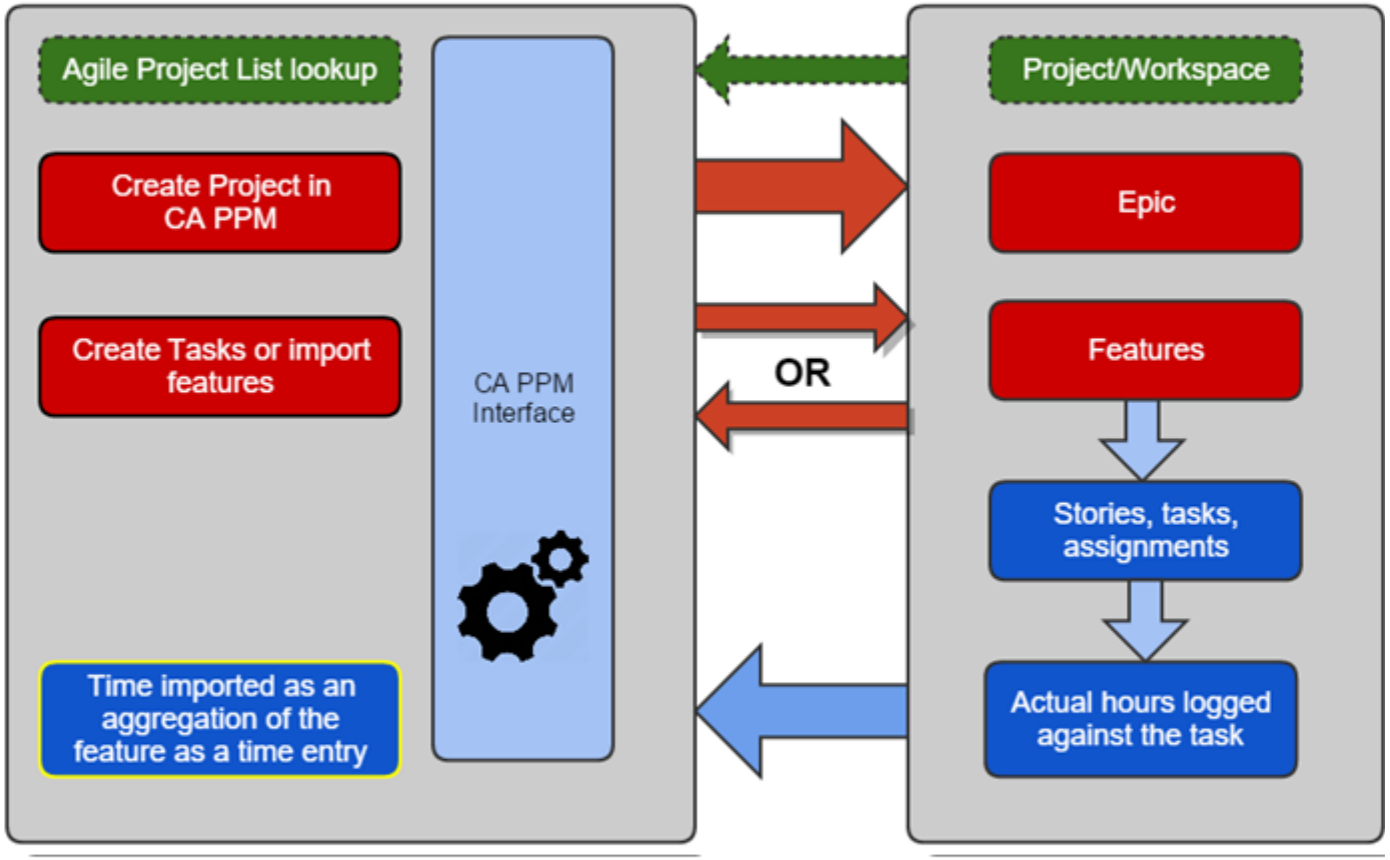
- Consolidate data
- Use one system for status reports
- Leverage the power of Clarity to get the right data to the right people

Part II:
Design Patterns

Discuss the integration options and the Rego Way.

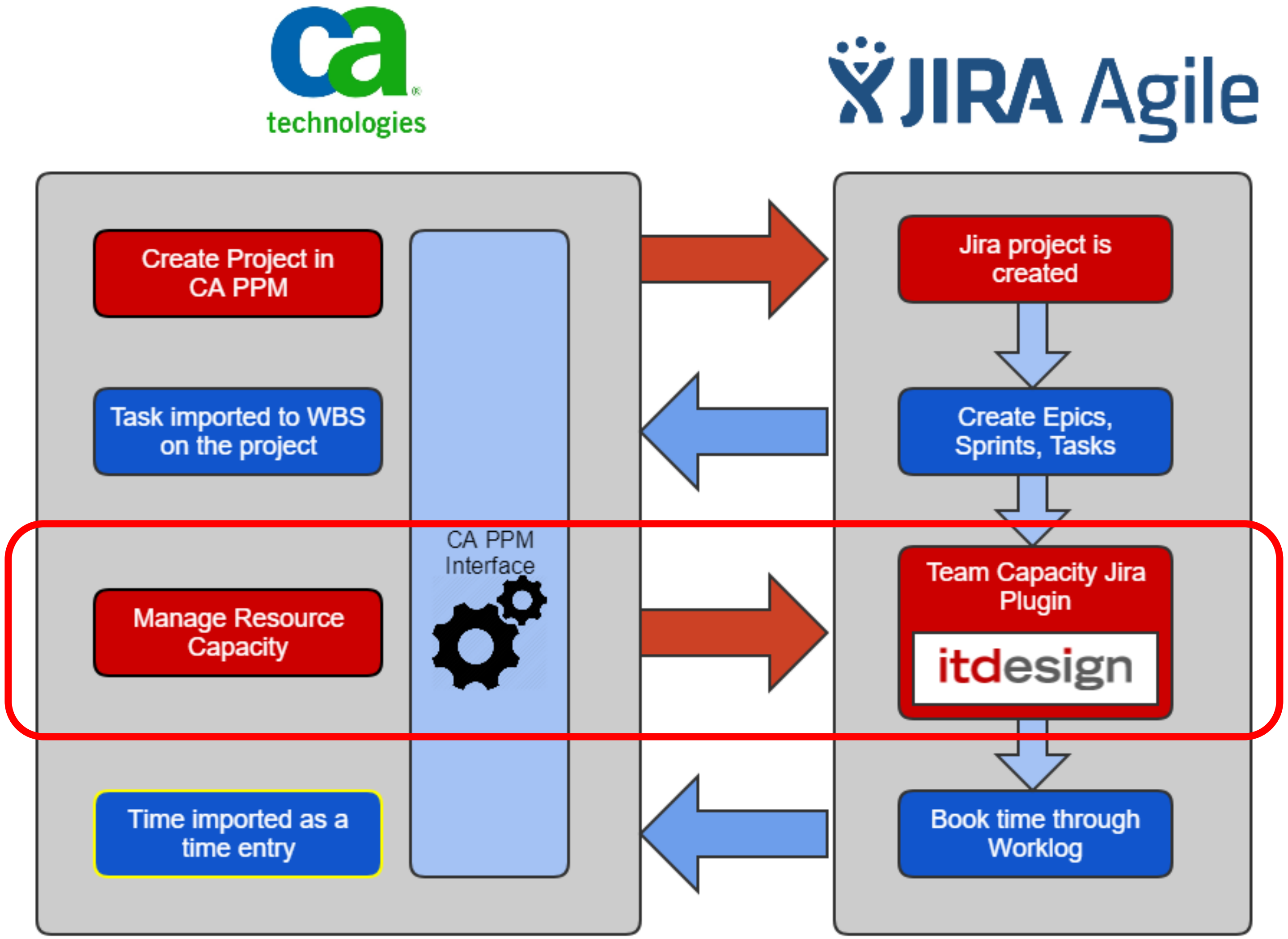
The Rego Way

- The Rego way is just one way
- Find your balance
- Tailor to your needs
- Establish
  - Business goal
  - Mapping
  - Triggers
  - Timing
- Reap the benefits of accurate data



Rego + itdesign for Jira

- New Jira plugin
- Manage Resource capacity in Jira
- Use both the Rego and itdesign solutions for a complete integration.



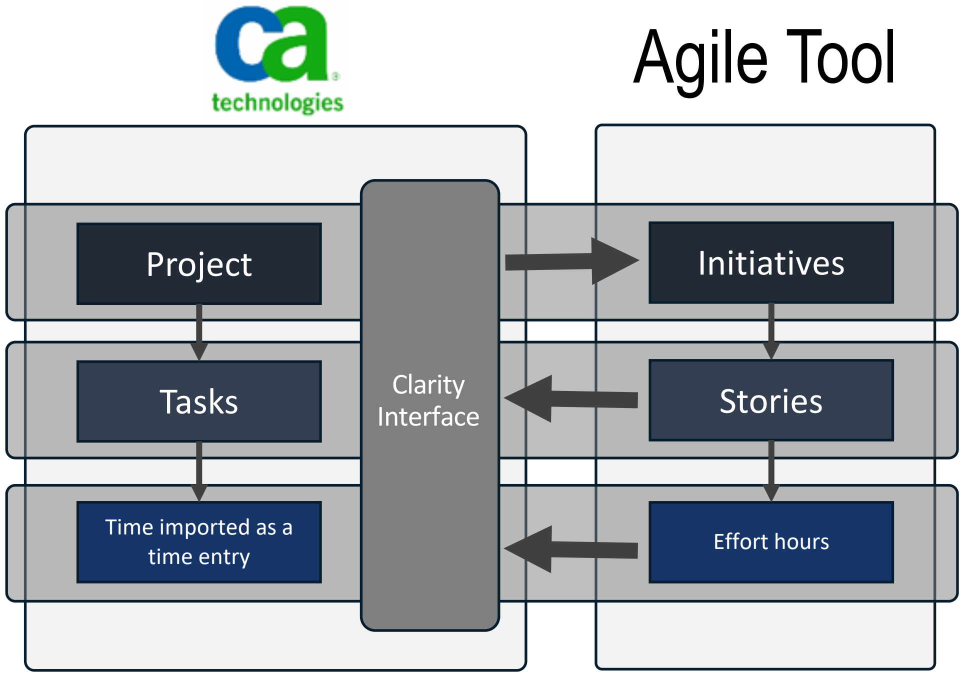
Rego's Agile Integration for Clarity

Our Clarity – Agile tool base integration has been crafted based on numerous client integrations.

While the direction of the feeds shown in this image are fairly standard, our connector allows us to switch direction and meet other needs such as:

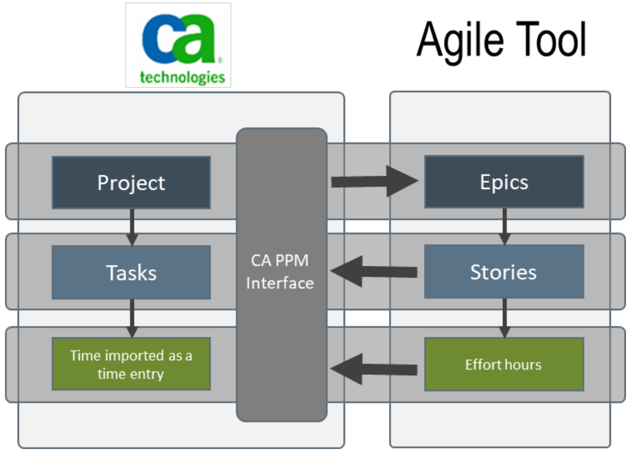
- Map Parent Tasks and Sub Tasks in Clarity to a hierarchical structure in the Agile tool
- Switch direction of the feeds
- Capture time in non-traditional ways such as through queuing in Kanban approaches

Standard Rego Clarity – Agile connection
(but can be tailored)

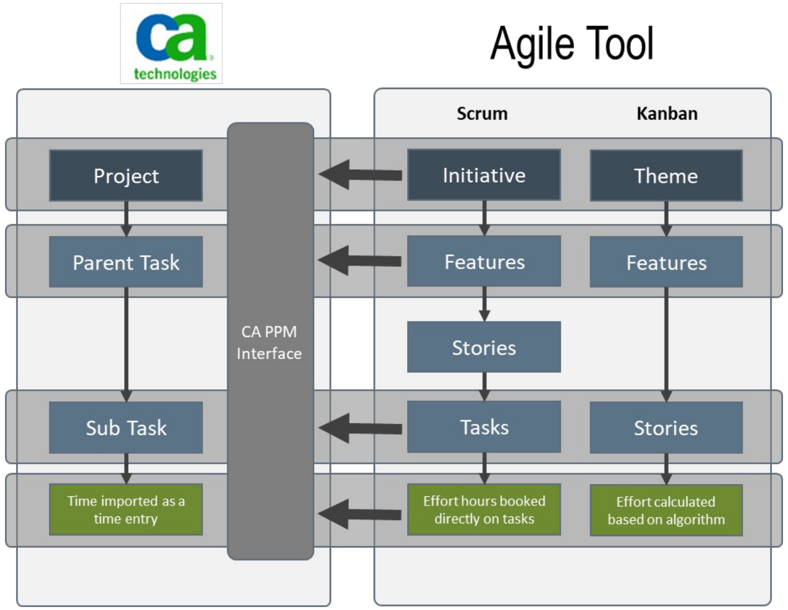


Our Experience runs the gamut of complexity

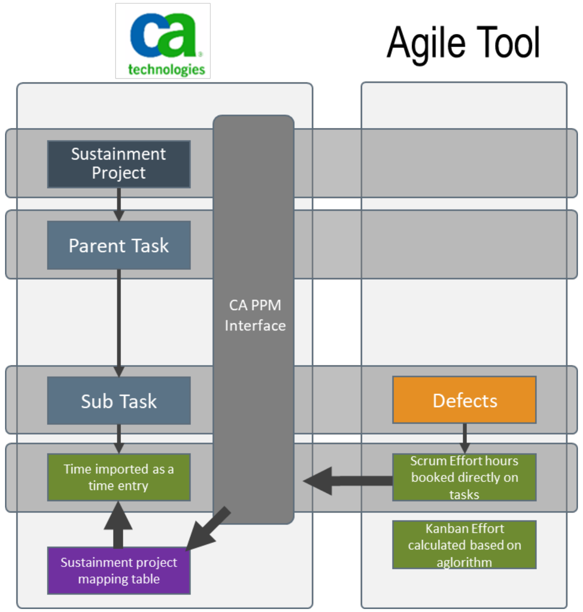
Standard PPM – Agile connection



Handling multiple Agile methods



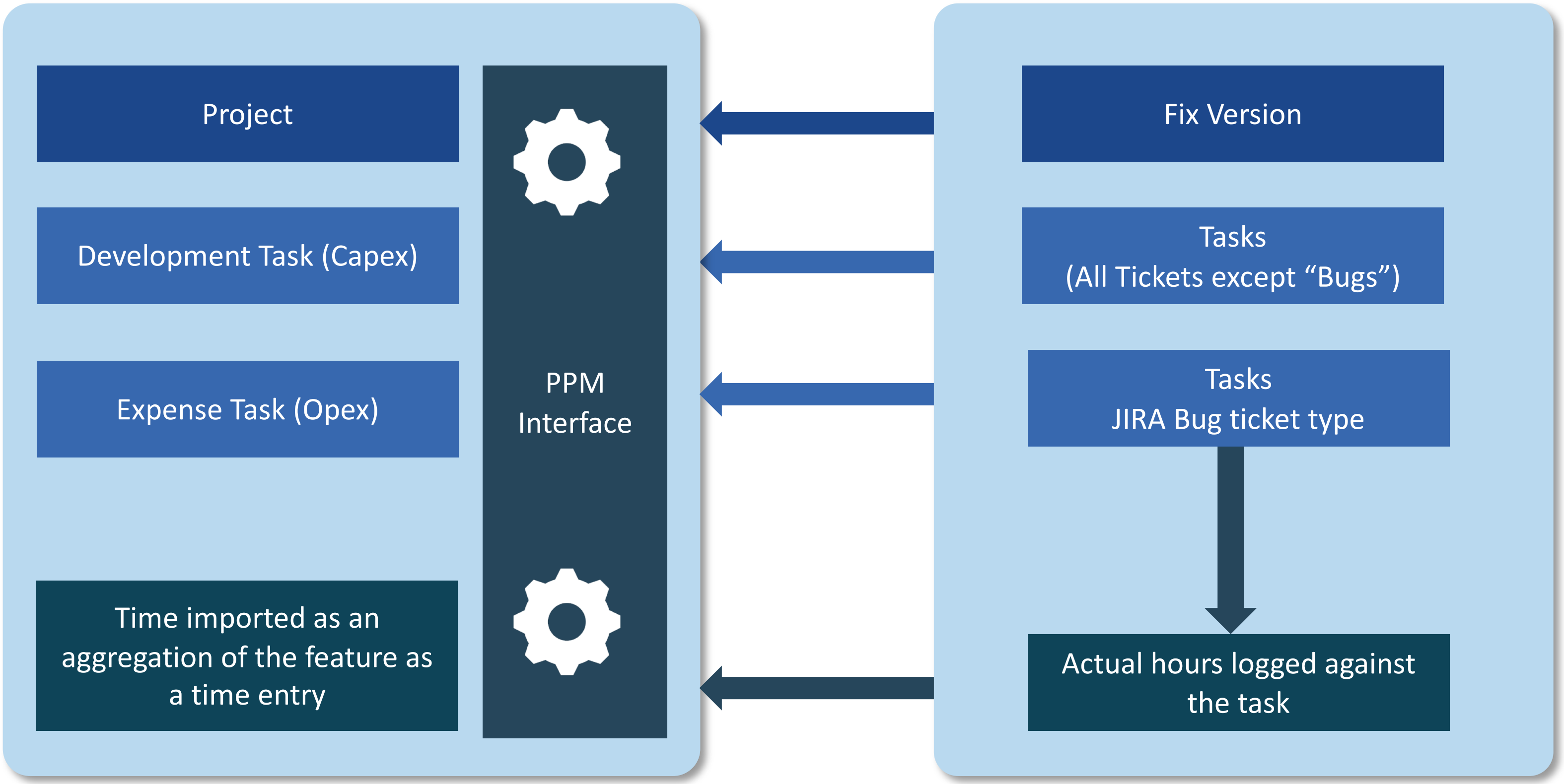
Handling Defects



Example of a tailored version from recent customer

Clarity PPM

JIRA

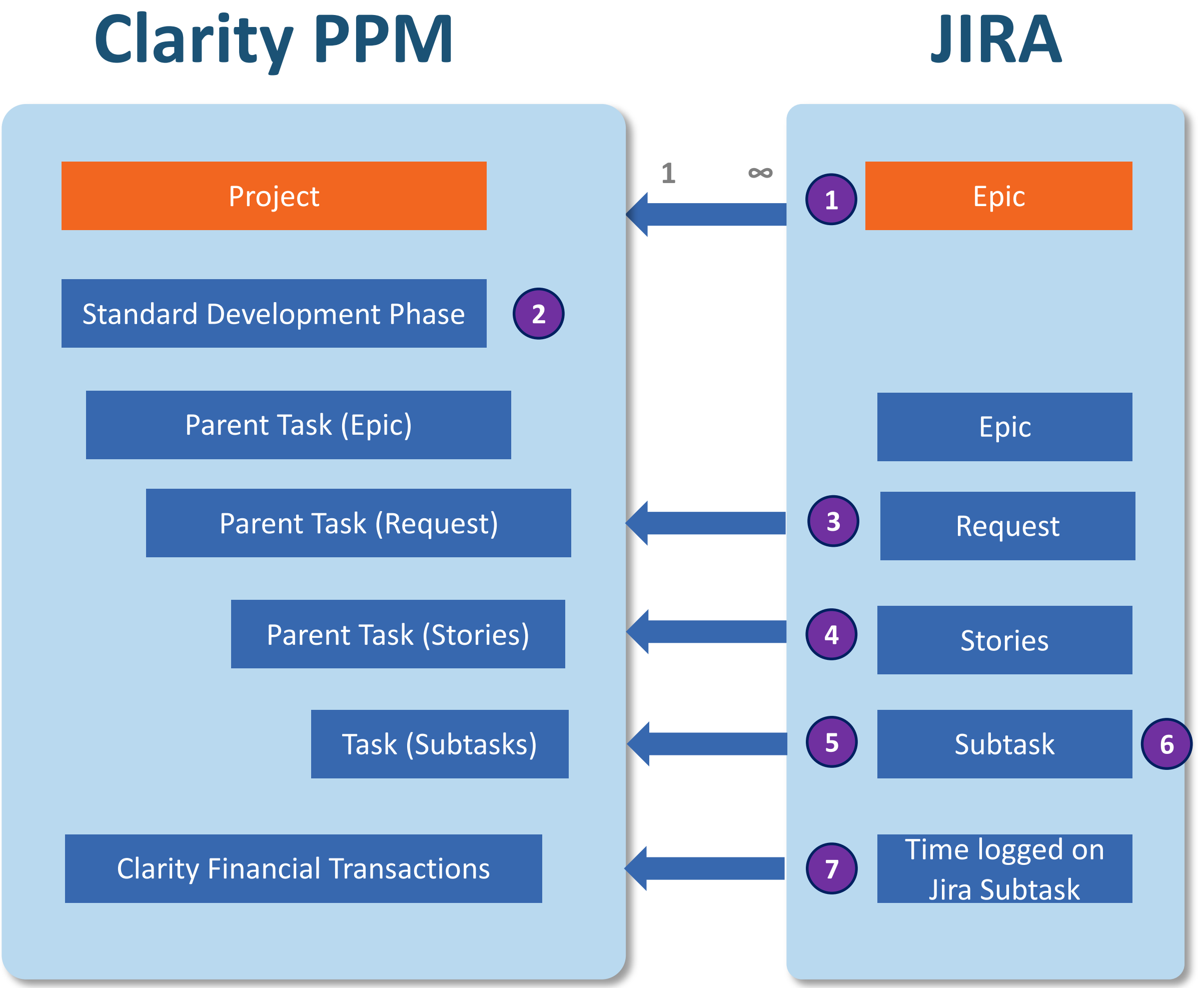


This customer had 11 branches where each used Jira slightly differently. We uncovered the fact that a common use of the Fix Version field could be used to allow each branch to continue using Jira in their own way, but have the data pulled into Clarity consistently

Another example

Decisions/Assumptions

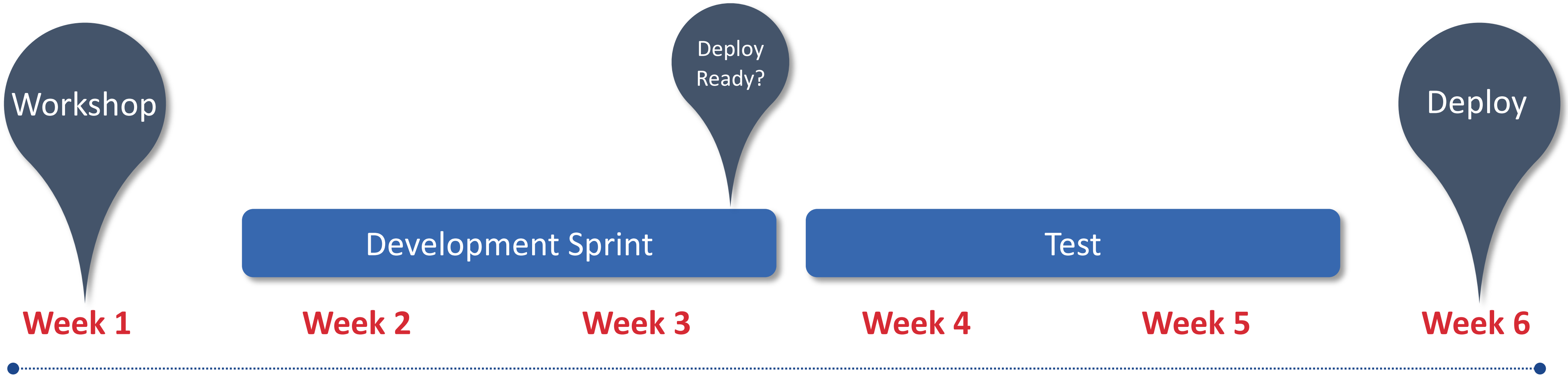
- Ignore "Portfolio" custom issue type during the import
- Custom issue type "Request" is contained as a child within the epic and NOT linked to an epic
- There is always a one to one mapping between Epic and Request.
- User stories are always created as a child within the epic and NOT linked to an epic
- QA defects (originating during the testing process) will not be imported into CA PPM
- For BA Only CRs, plan to do the updates manually into CA PPM as the volume is too low. This will reduce the integration scope and complexity.
- IT to maintain naming consistency of standard tasks (like Development, QA, Test Case writing etc) within stories



1. The Clarity project is created manually, one or more Jira Epics can be linked (assume we use our base connector for this)
2. All Jira work items will be placed within the Clarity WBS under a specific Clarity Phase *(assume to continue to use the functionality you built in already)*
3. The Jira Request associated with the Epic connected to Clarity should create a Task in Clarity and be located into the Clarity Parent Task—there may not always be a Request within an Epic, and in that case, the connector can simply ignore that and place the Stories into the Clarity WBS
4. Associated Jira Stories should be added to the Clarity WBS within this hierarchy
5. Jira Subtasks should be added to the Clarity WBS within this hierarchy
6. The creation of the Jira subtasks in Clarity should be based on a sorting of the Jira subtasks by End Date
7. Actual time from Jira subtasks will create financial transactions using an existing Rate Matrix

Part III:
How to proceed

Typical Approach



Workshop*

- 1 day workshop to capture user stories
  - Analyze and estimate customization needs
  - Determine if they are beyond initial estimate

Develop

- Rego's 2 week sprint for your customization
  - After the first week we do a demo; and expect minor tweaks/fixes
  - At the end of the 2 weeks, perform a final demo

Test

- Allow you a period of testing (typically 2 weeks)
  - Bug-fixes are addresses
  - Enhancements are added to a backlog

Deploy

- We then push the MVP to production at your direction

*It is assumed that you already have a good grasp of the value stream or set of processes you're attempting to automate; if this is not the case we can help you do this in another workshop

Typical Tailoring Workshop Agenda

Intro

- Kick-off
- Workshop purpose/agenda review
- How we'll do this
- Critical success criteria

Review Objectives/Stories

- Review submitted user stories (if applicable)

Mapping

- Project level/CIT
- Task level
- Attributes

Financials

- How do we calculate costs
- How do we differentiate capital/operating costs, if needed

Resources

- How might resources/staffing be handled

Time Tracking

- Are there any deviations needed to the standard connector time-tracking approach

Reporting

- What metrics are needed
- What views/reports are needed

Exception Processes

- How do we handle exceptions (i.e. story moves from one project to another, etc.)
- What is an error vs a warning

Data Migration Approach

- To go-live, how will we establish all of the connections for existing projects

Conclusion

- Review open items/parking lot
- Review captured stories
- Discuss next steps

Participation should include:

- Clarity Admin
- Agile System Admin
- Product Owner Representation
- PMO Representation

Questions?

Thank You For Attending regoUniversity

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.

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