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NASHVILLE • 2022

PPM Ecosystem: Clarity & Other Tools Integrating Well

Your Guides:

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Introductions

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



Agenda

- Why integrate?
- Integration Options
- Most Common Integrations
- Lessons Learned

Part I: Why Integrate?

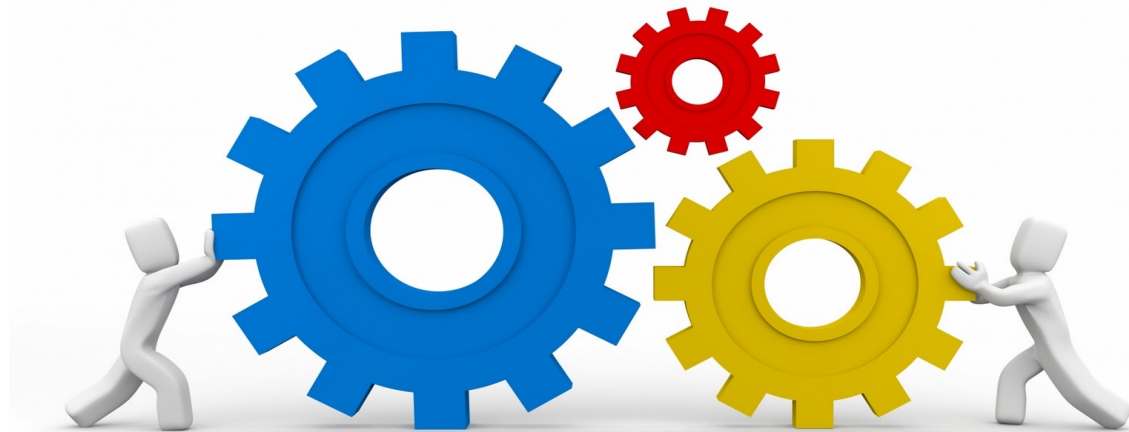


Open Mic: Why Integrate?

- Have you had success with integrations to Clarity?
- What has been the primary driver for integration in your environment?

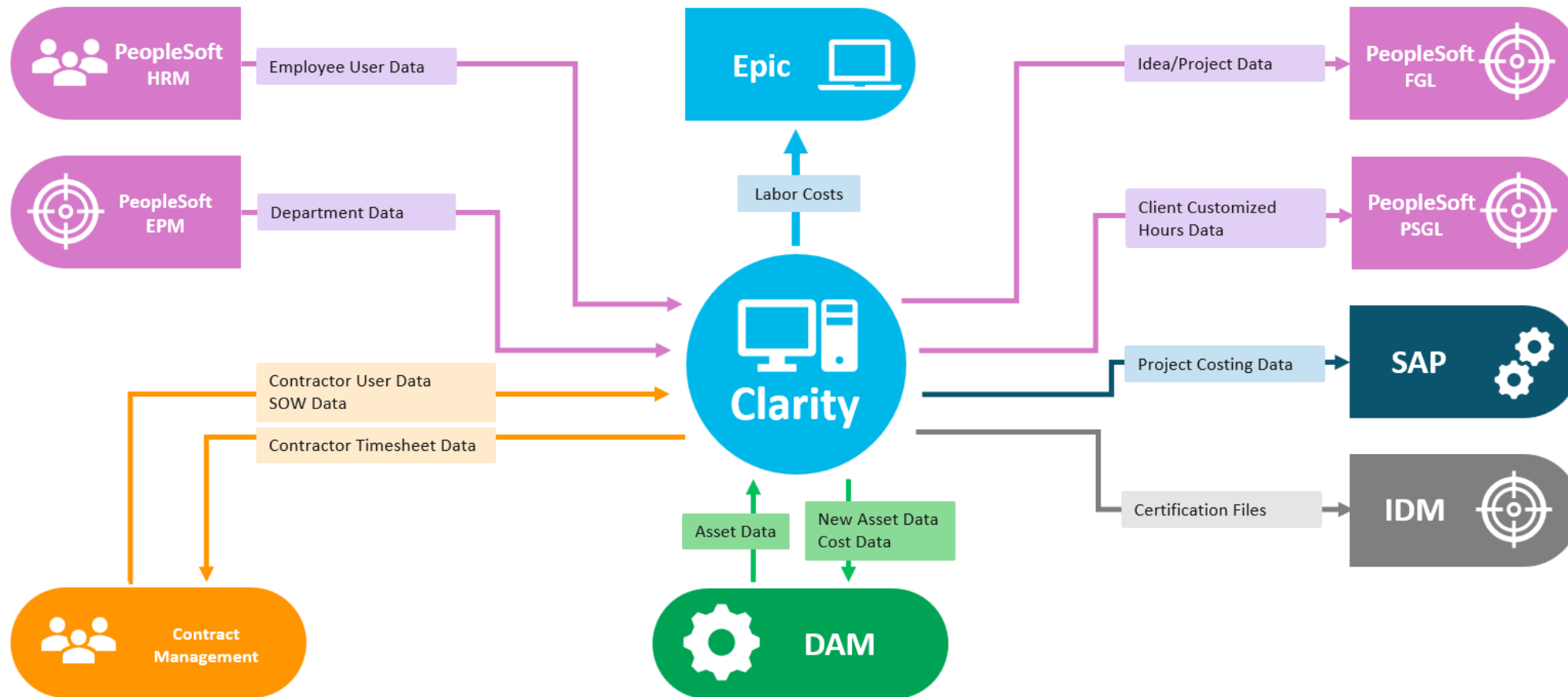
Why Integrate Is Important

System integration is becoming more important due to the increasing advances in automation technology, and the associated need to simplify processes for easier management. An **integrated system** will streamline your processes, reduce costs and ensure efficiency.



Clarity as the Single Source

Digital Ecosystem Architecture



Benefits of Integration

- **Easier for Administrators and Users**
 - Eliminates use of multiple tools, reducing training time and lessens change of human error
- **Cost and Storage Savings**
 - Reduce time spent on upkeep and troubleshooting
 - Decrease storage and application costs
- **Better Analysis**
 - Easier access to centralized and normalized data
- **Improved System Security**
 - Fewer points of access to protect
- **Opportunity for Real Time Data**
 - Improved visibility for more accurate and timely decisions
- **Accelerated Growth and innovation**
 - Reduce process steps to allow more time for value-add activities

Part II: Integration Options



Integrations Have Come A Long Way

- Ten years ago, integrations were very expensive and technically challenging
- Integration technology has evolved becoming more dependable, timely and cost effective
 - Web Services
 - SOAP
 - REST
 - GraphQL – Bleeding edge
 - 3rd Party Services
 - IAAS
 - Webhooks
- The cost of a typical Rego Integration is \$8K inbound and \$6K outbound

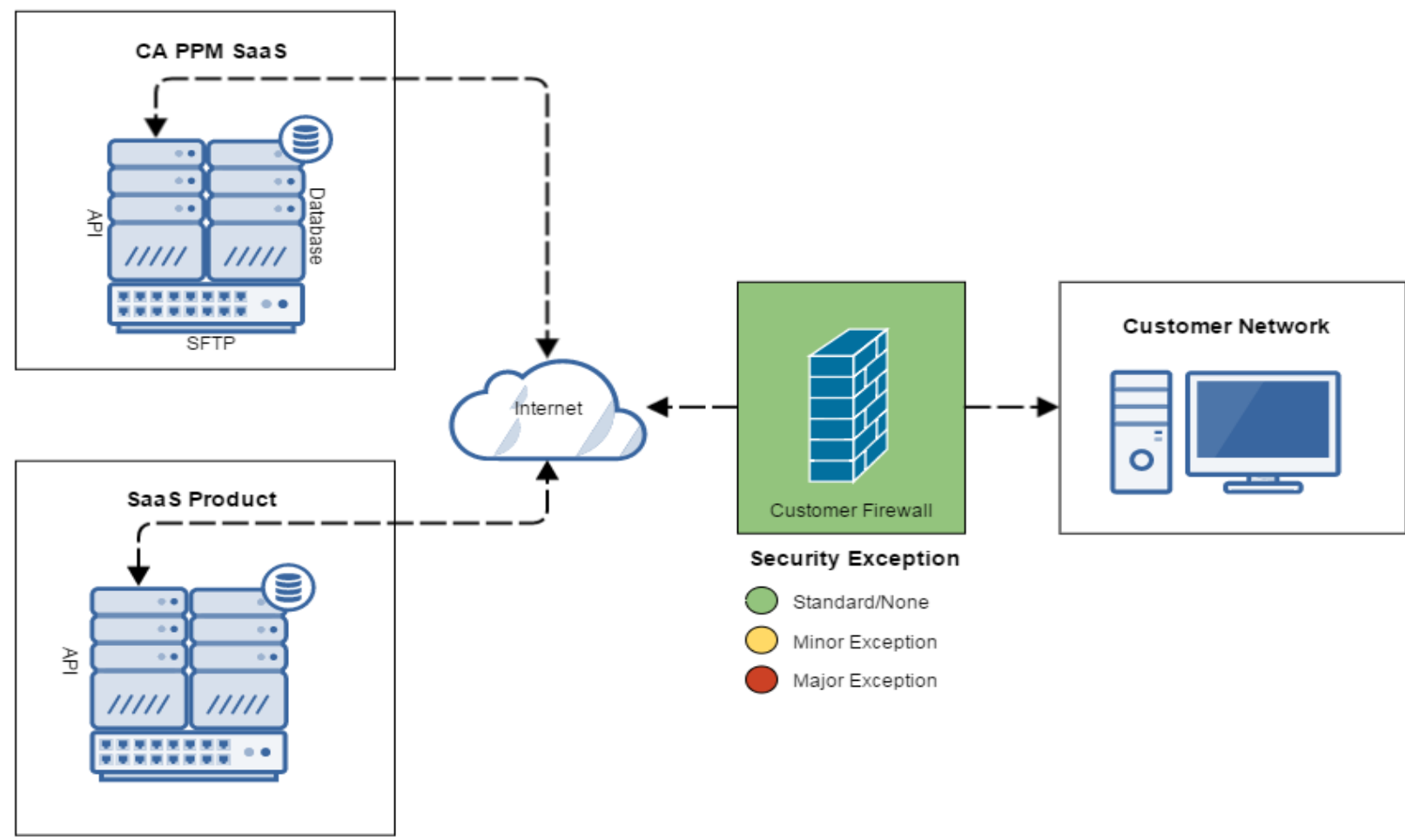
When Should An Interface Run?

- Event based
 - This type of Interface is triggered by event in the system (something got created or updated or deleted)
- Batch
 - This type of interface is scheduled and triggered at a set time (nightly or at certain interval, etc.)
 - Since, batch interfaces will handle multiple instances, you want to address transaction managements (what happens when a record fails – one fail, all fail?)
- Manual
 - This type of Interface is manually started by the user when they are ready for data transmittal

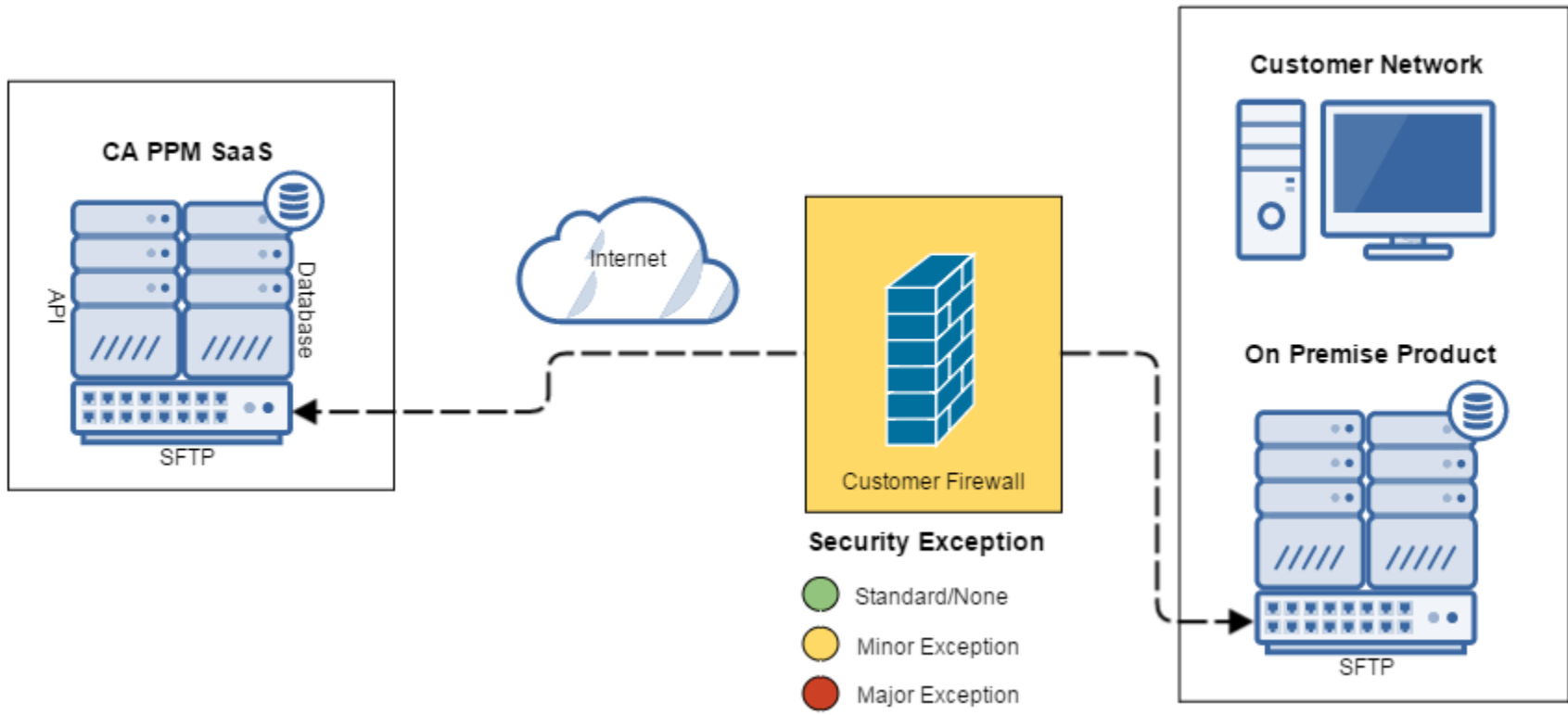
How Should an Interface Be Designed?

- Flat File: CSV export
- Web Services: REST/SOAP
- Third Party Tools
 - Dell Boomi
 - Cast Iron
 - Tasktop

Method –API / Web Service / REST



Method – Flat File / SFTP



Part III: Most Common Use Cases



Open Mic

- What integrations do you have in place today?
- How do they work for you?
- What integrations do you have on your roadmap for the next year?

Most Common Integrations

- Agile Tools

- Who - Jira, Agile Central, V1, TFS, Rational
- How - API
- What - Project Lifecycle, Time Entry, Capitalization Data

- ERP/Financial Systems

- Who - SAP, Oracle, JD Edwards, Lawson, Sage, Great Plains, Infinium, Peoplesoft
- How - Flat file
- What – Direct Expenses, Time Entry, Cost Centers Forecasts, Budgets

- HR/ Resources Systems

- Who – ERP Systems, Active Directory, Workday, CA On Demand Portal
- How – Flat file
- What - LDAP/SSO, Users and Resource Data, Organizational Structure,

- ITSM

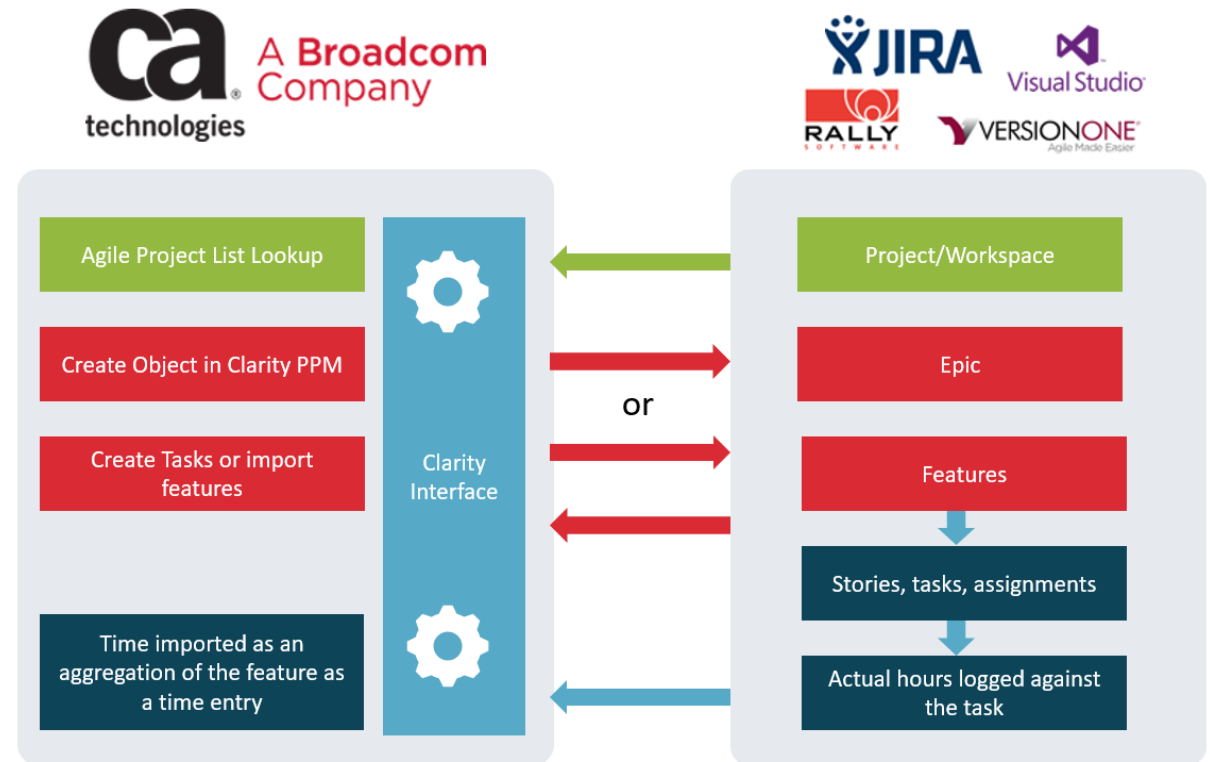
- Who – ServiceNow, CA Service Desk, Remedy
- How - API
- What - Idea and pipeline management, Ticket Escalation, Enhancement requests

Rego Standard Agile Offering – 80% of Implementations

- Govern and report from Clarity
- Execute in the Agile tool
- Customizable any workflow
- Connect to multiple Agile tools at once
- Optional - Agile workshop

























Content
Intro <ul style="list-style-type: none">• Kick-off• Workshop purpose/agenda review• How we'll do this• Critical success criteria
Review
Objectives/Stories <ul style="list-style-type: none">• Review submitted user stories (if applicable)
Mapping <ul style="list-style-type: none">• Project level• Task level• Attributes
Financials <ul style="list-style-type: none">• How do we calculate costs• How do we differentiate capital/operating costs if needed
Resources <ul style="list-style-type: none">• How might resources/staffing be handled

Content
Time tracking <ul style="list-style-type: none">• Are there any deviations needed to the standard connector time-tracking approach
Reporting <ul style="list-style-type: none">• What metrics are needed• What views/reports are needed
Exception processes <ul style="list-style-type: none">• 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 <ul style="list-style-type: none">• To go-live, how will we establish all of the connections for existing projects
Conclusion <ul style="list-style-type: none">• Review open items/parking lot• Review captured stories• Discuss next steps



Other Integrations

- Schedulers
 - Smartsheet
- Vendor Management
 - Beeline, Deltek, Fieldglass, Ariba
- Time Management
 - Kronos, Smart Track
- Demand Intake
 - SharePoint, Webforms, Salesforce
- Applications
 - Troux
- Reporting Extracts
 - Cognos, Power BI, Generic Data Warehouses

ITSM	Intake and Collaboration	Applications	Vendor and Time Management	Project and Resource Management
   	       	 	   	     










regoLink

Innovation and integrations for Clarity





Agile Integrations

HR/Resource/Financial















Reporting and Business Intelligence








Part IV: Lessons Learned



Integration Guidelines

- Is there a Single Source of Truth (SSOT)?
 - Ensure that everyone uses the same data when making business decisions
 - Understand the accuracy and value of the source data
 - Differentiate between data creation/maintenance and data usage
- Is the process mature?
 - Integrations are built to match process
 - You must understand the process and the flow of information
 - You must have a solid repeatable process and be able to identify programmatically the exceptions
- Don't over-integrate.
 - Weigh the cost (one-time and ongoing) vs. benefit of each integration opportunity
 - Identify the key integration points and invest in doing it correctly

Objective: Get More Out of your PPM Investment!

Error Handling & Testing

- Error handling / transaction management
 - Errors are inevitable when two different systems are being integrated
 - Plan to develop an error handling mechanism to handle data errors, connectivity errors, and system outages
 - Equally important is transaction management and performance considerations
- Trial first to avoid errors
 - Before you build the complete interface, try a semi-automated load to ensure the “process” you have defined is correct
 - It is really important to have test environments that mirror the productions as much as possible and that the data is representative of actual production data

Questions?



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- 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**



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