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SAN DIEGO • 2023
PPM Ecosystem: Clarity & Other Tools Integrating Well
Your Guides:
Jacob Cancelliere and Wes McCoubrie

Introductions

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

Agenda

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

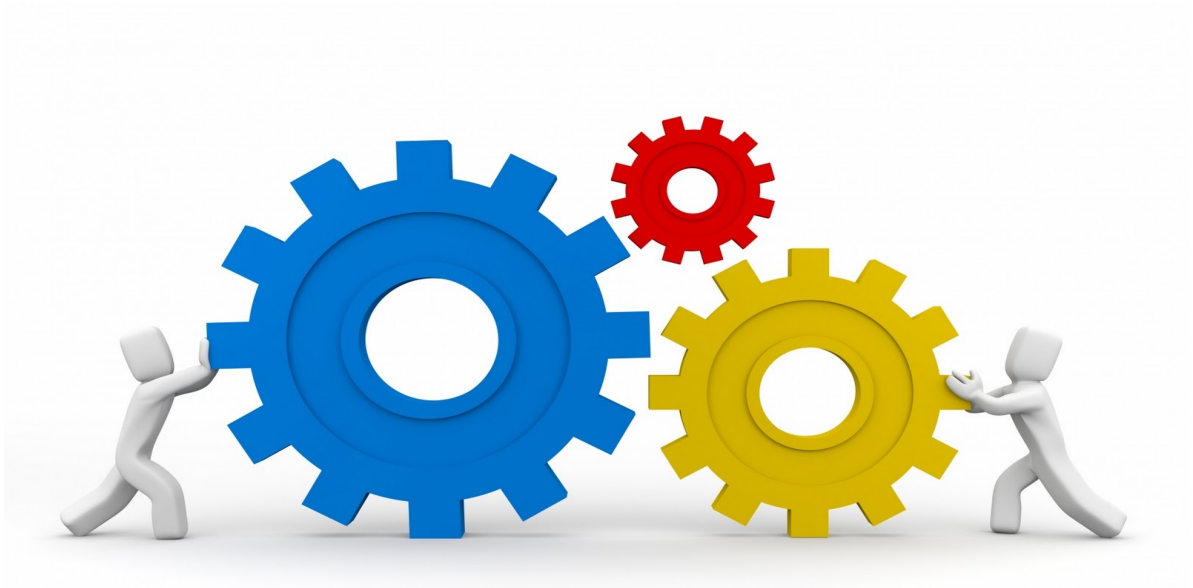
Part I:
Why Integrate?

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.



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

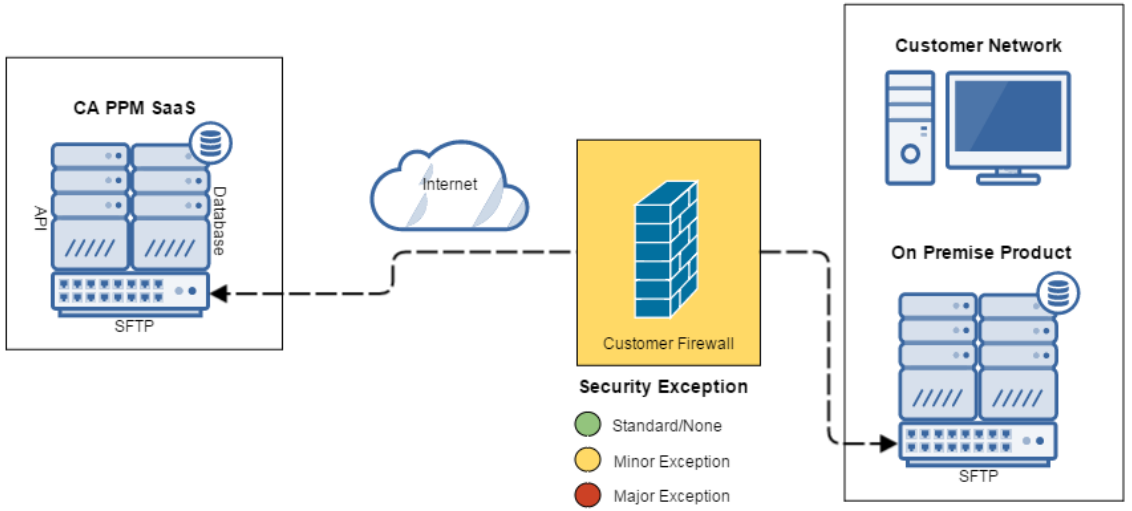
- Ten years ago, integrations were very expensive and technically challenging
- Integration technology has evolved becoming more dependable, timely and cost effective
  - Flat File
  - Web Services
  - 3rd Party Services
- The cost of a typical Rego Integration is $8K inbound and $6K outbound

When Should An Interface Run?

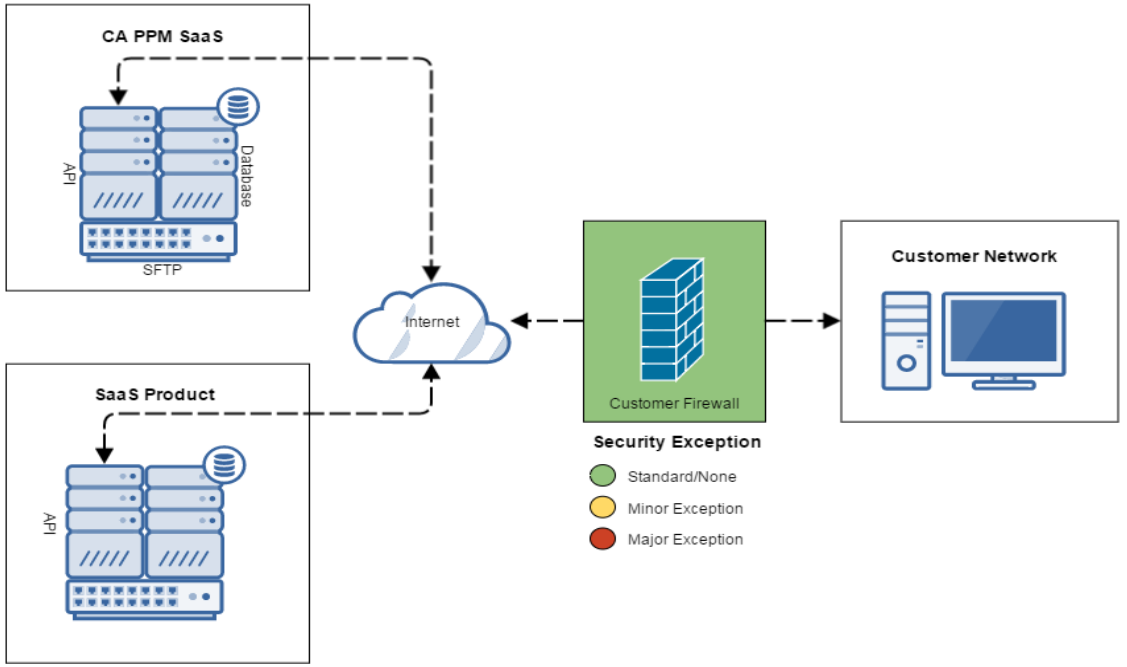
- Event based
  - This type of Interface is triggered by event in the system (something got created or updated or deleted)
- Batch
  - This type of interface is scheduled and triggered at a set time (nightly or at certain interval, etc.)
  - Since, batch interfaces will handle multiple instances, you 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 / SFTP



- API / Web Service / REST



- Third Party Middleware: (e.g., Altryx)

Part III:
Most Common Use Cases

Open Mic

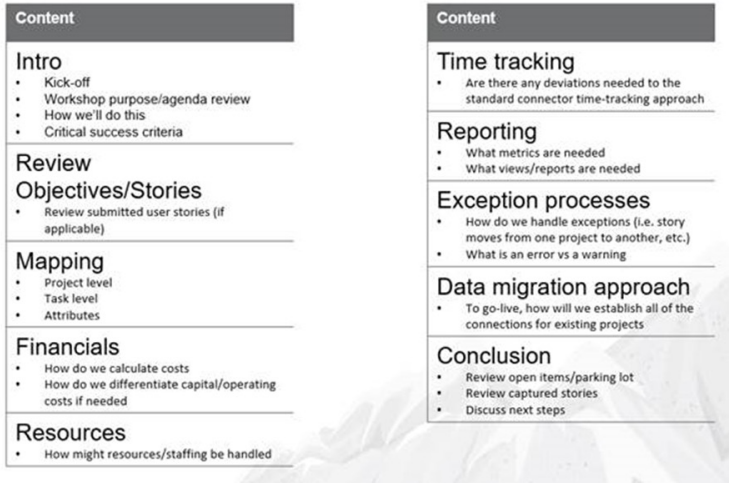
- What integrations do you have in place today?
- How do they work for you?
- What integrations do you have on your roadmap for the next year?

Most Common Integrations

- Agile Tools
  - Who – Rally, Jira, VersionOne
  - 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
- 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
- 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

Content

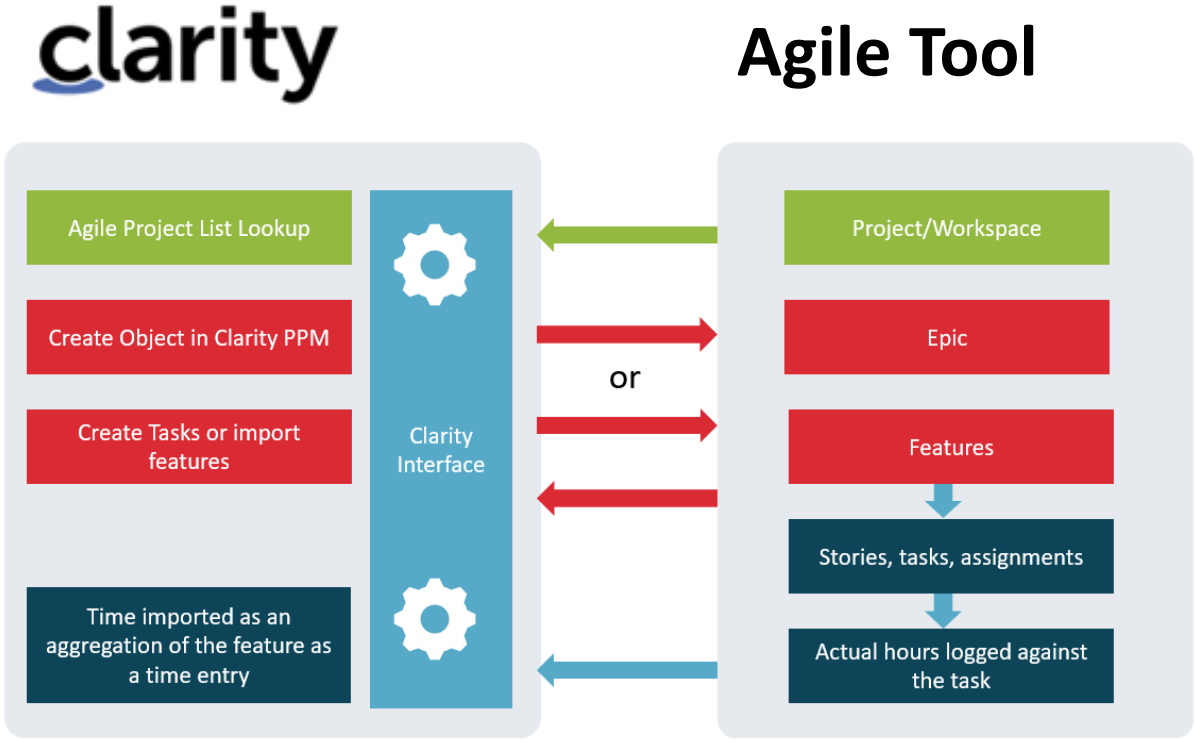
Time tracking
- Are there any deviations needed to the standard connector time-tracking approach

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



Check it out! Agile Integrations Bi-Modal IT (Monday, 3:50PM PT)

Other Integrations

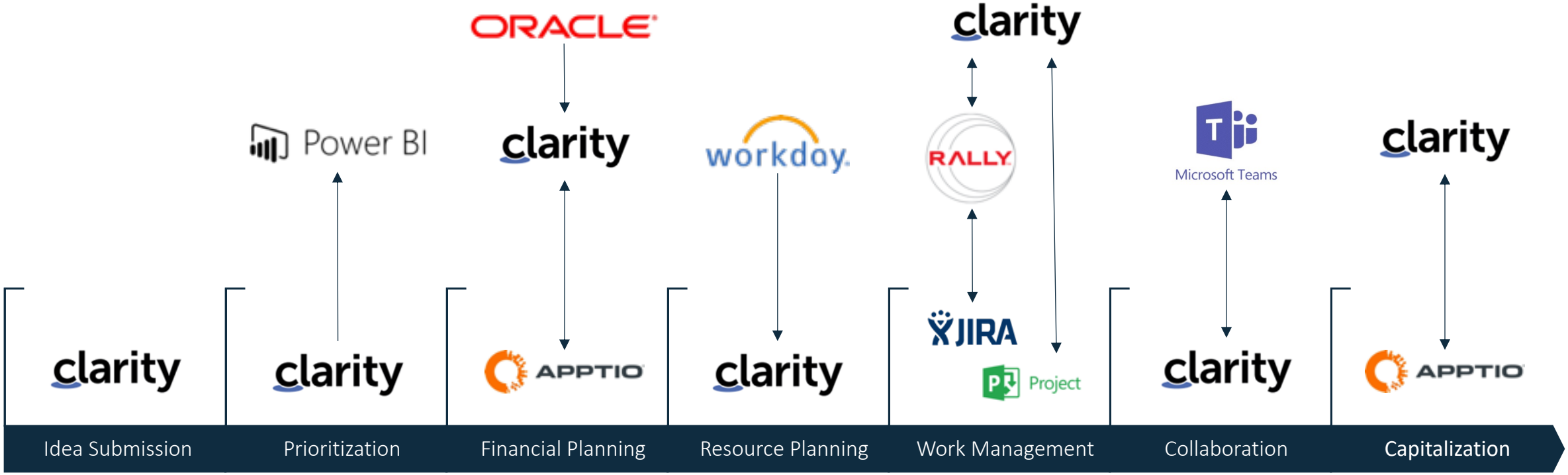
- Schedulers: Smartsheet
- Vendor Management: Beeline, Deltek, Fieldglass, Ariba
- Time Management: Kronos, Smart Track
- Demand Intake: SharePoint, Webforms, Salesforce
- Reporting Extracts: DWH, Power BI, Tableau

Be wary not to “over-integrate.” Think about each connection in the ecosystem strategically and evaluate options:

- Integrate, especially if tool has strong use case and adoption.
- Retire, especially if capabilities are duplicative.
- Leave, especially if the value of connecting the solutions isn’t worth the technical complexity.

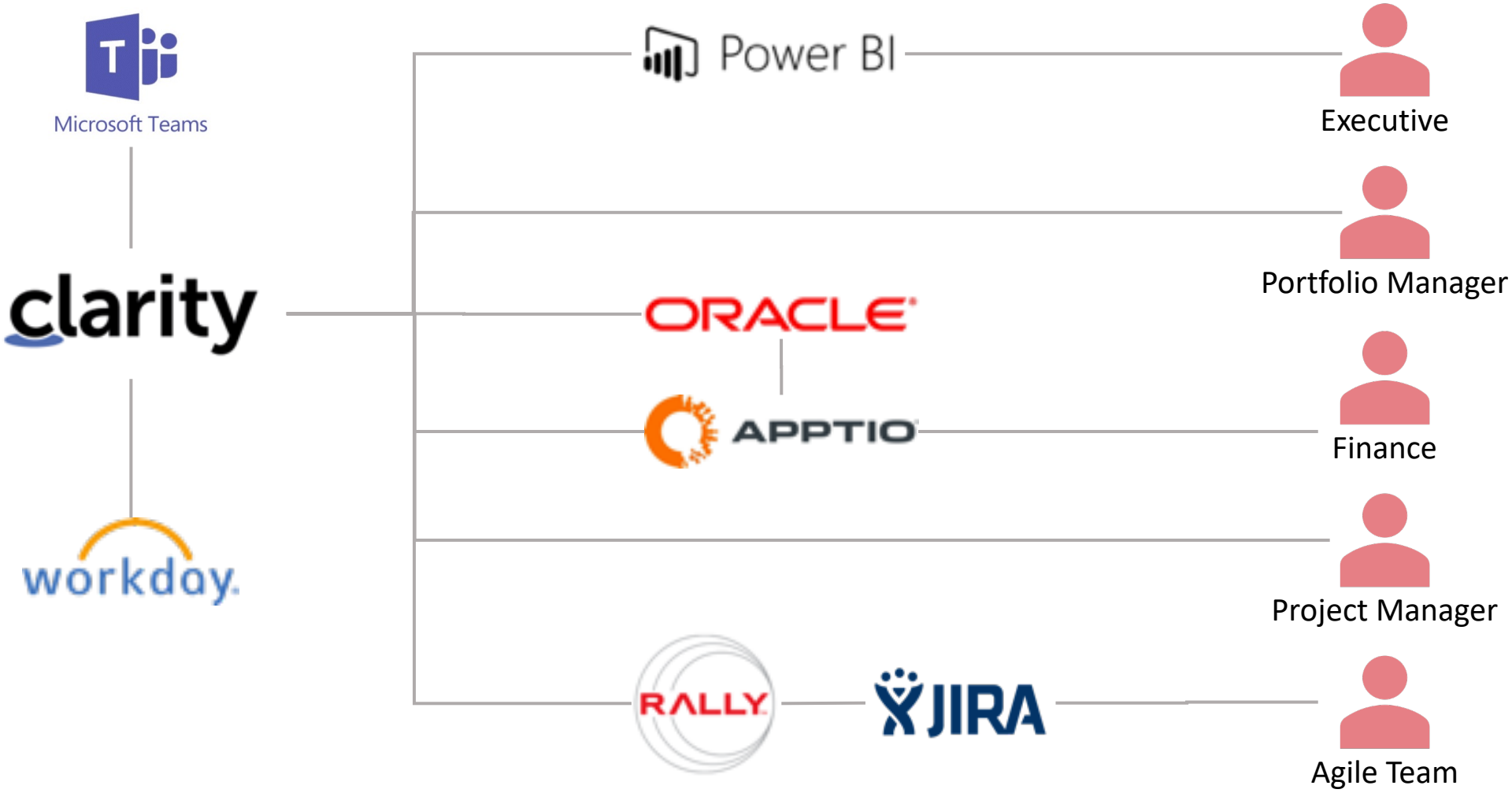
Value Stream-Based Architecture

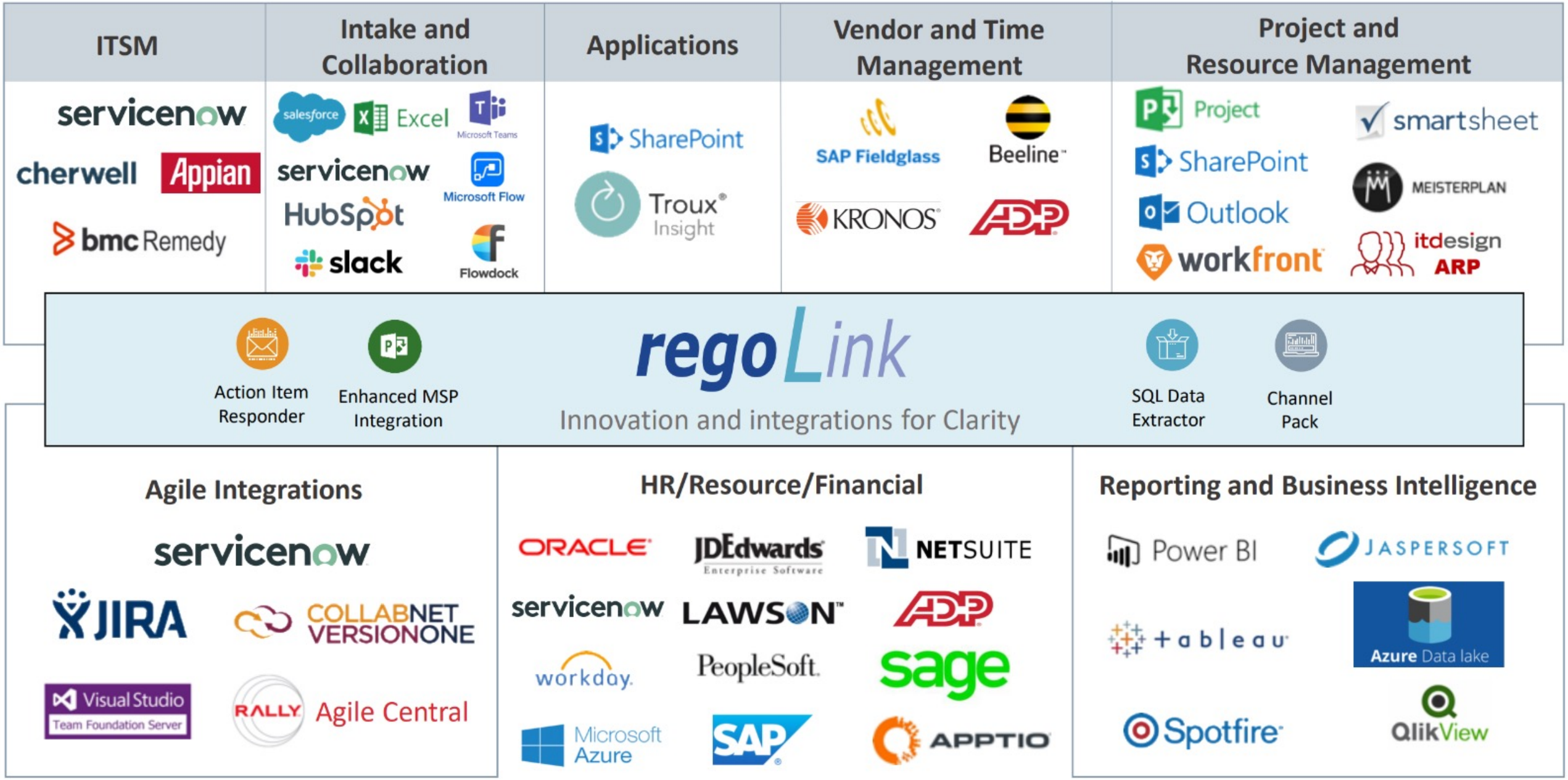
Overarching goal is to define systems of record and directional integrations.



Persona-Based Architecture

Overarching goal is to keep personas within minimal, fit-for-purpose solutions.




ITSM
servicenow
cherwell
Appian
bmc Remedy
Intake and Collaboration
salesforce
Excel
Microsoft Teams
servicenow
Microsoft Flow
HubSpot
slack
Flowdock
Applications
SharePoint
Troux Insight
Vendor and Time Management
SAP Fieldglass
Beeline
KRONOS
ADP
Project and Resource Management
Project
smartsheet
SharePoint
MEISTERPLAN
Outlook
workfront
itdesign ARP
Action Item Responder
Enhanced MSP Integration
regoLink
Innovation and integrations for Clarity
SQL Data Extractor
Channel Pack
Agile Integrations
servicenow
JIRA
COLLABNET VERSIONONE
Visual Studio Team Foundation Server
RALLY Agile Central
HR/Resource/Financial
ORACLE
JDEdwards Enterprise Software
NETSUITE
servicenow
LAWSON
ADP
workday.
PeopleSoft
sage
Microsoft Azure
SAP
APPTIO
Reporting and Business Intelligence
Power BI
JASPERSOFT
tableau
Azure Data lake
Spotfire
QlikView

Part IV:
Lessons Learned

Error Handling & Testing

- Error handling / transaction management
  - Errors are inevitable when two different systems are being integrated
  - Plan to develop an error handing 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

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!

Questions?

Surveys

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

Add QR Code to class survey

Add QR Code to event survey

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Let us know how we can improve!
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