

Platinum Sponsor

**ValueOps**  
by Broadcom

**Rally** **Clarity**  
by Broadcom by Broadcom



**rego**University

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?

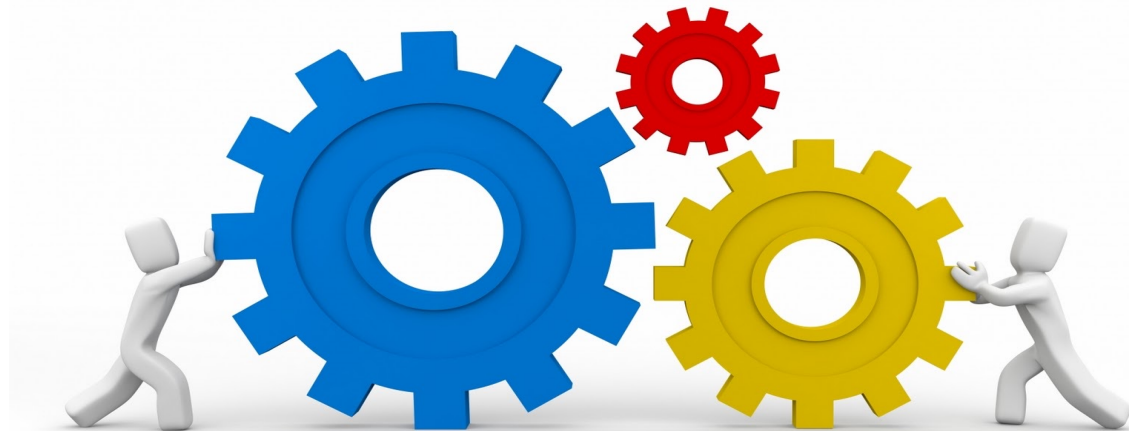
# Open Mic: Why Integrate?

---

- Have you had success with integrations to Clarity?
- What has been the primary driver for integration in your environment?
- Do you have an Integration that is being avoided or deferred?

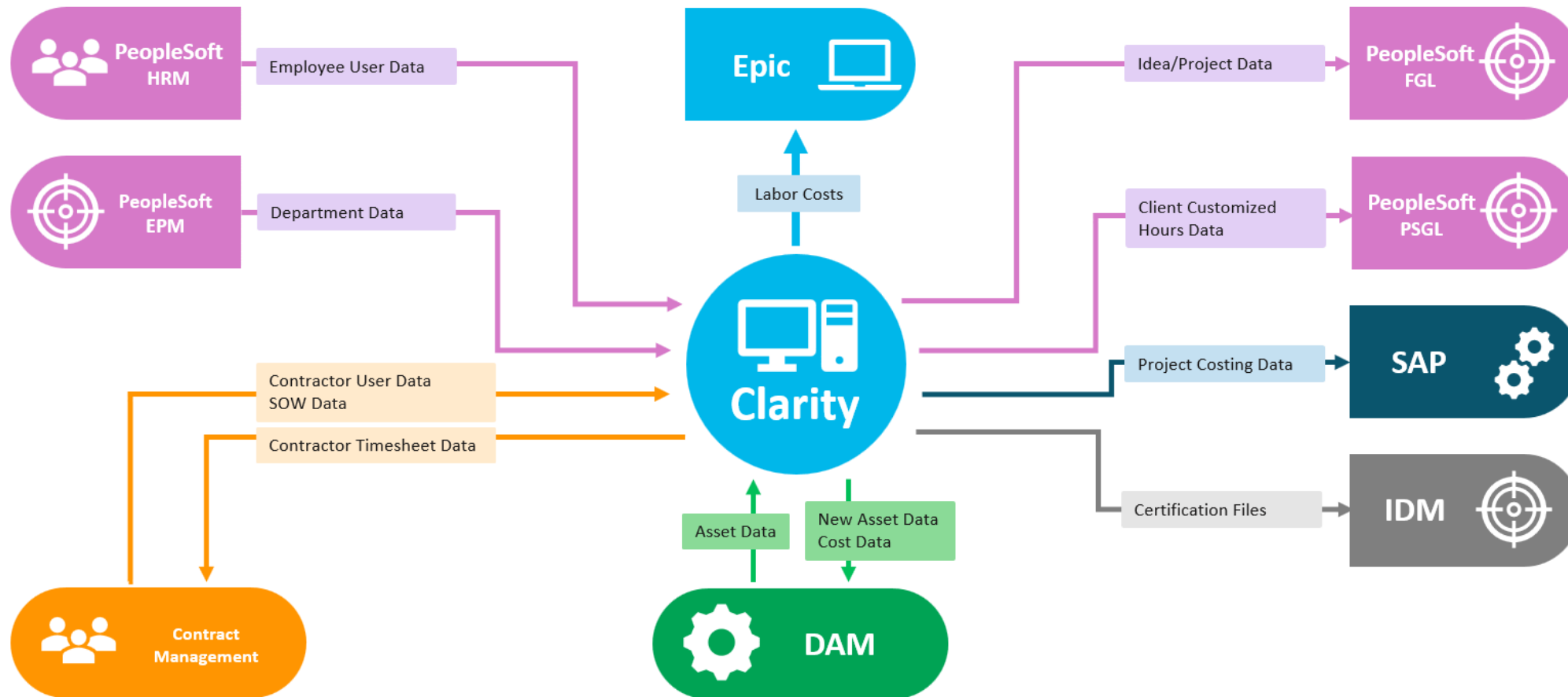
# Why Integrate Is Important

**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
  - 3<sup>rd</sup> Party Services
    - IAAS
    - Webhooks
- The cost of a typical Rego Integration is \$8K inbound and \$6K outbound

# When Should An Interface Run?

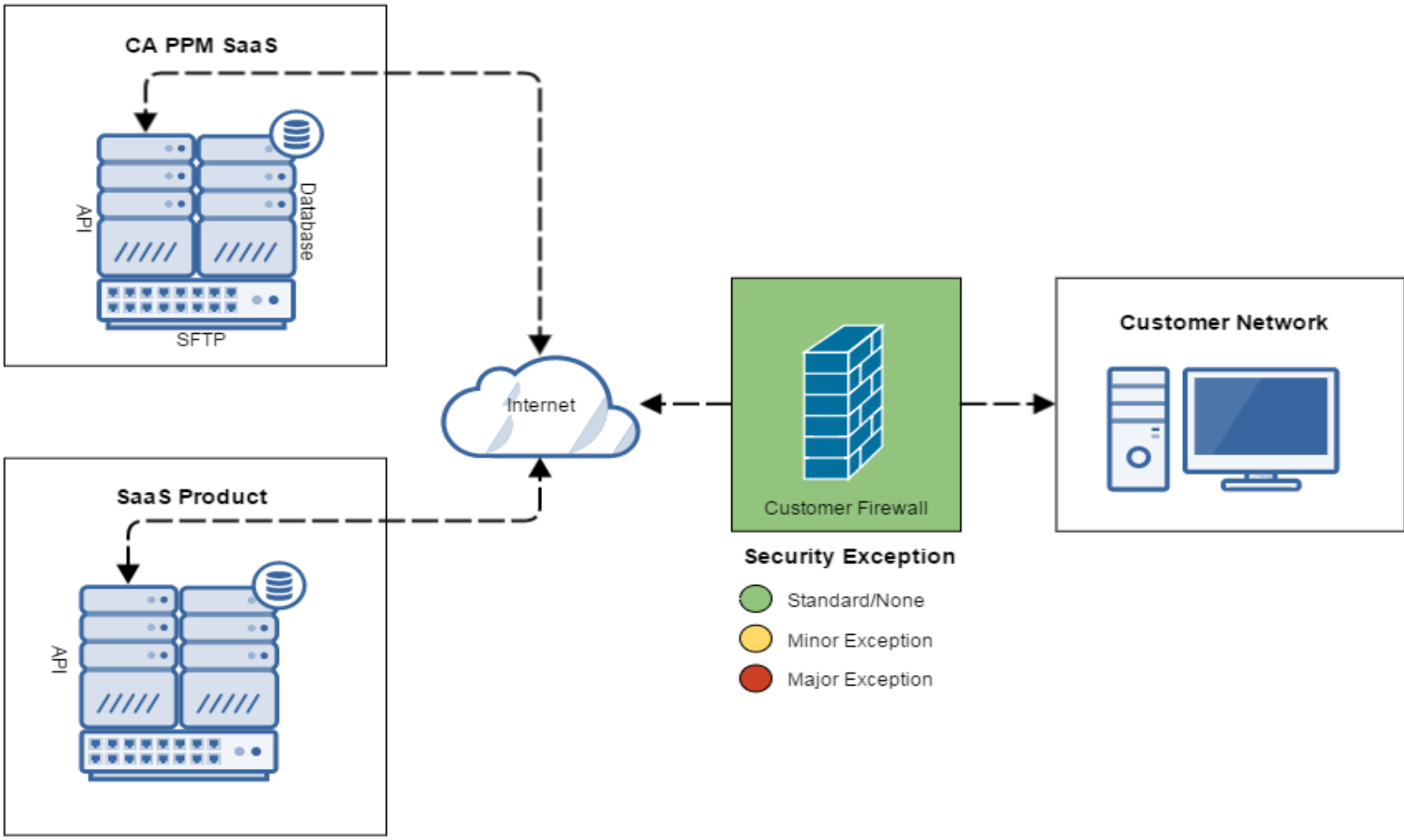
- Event based
  - This type of Interface is triggered by event in the system (something got created or updated or deleted)
- Batch
  - This type of interface is scheduled and triggered at a set time (nightly or at certain interval, etc.)
  - Since, batch interfaces will handle multiple instances, you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

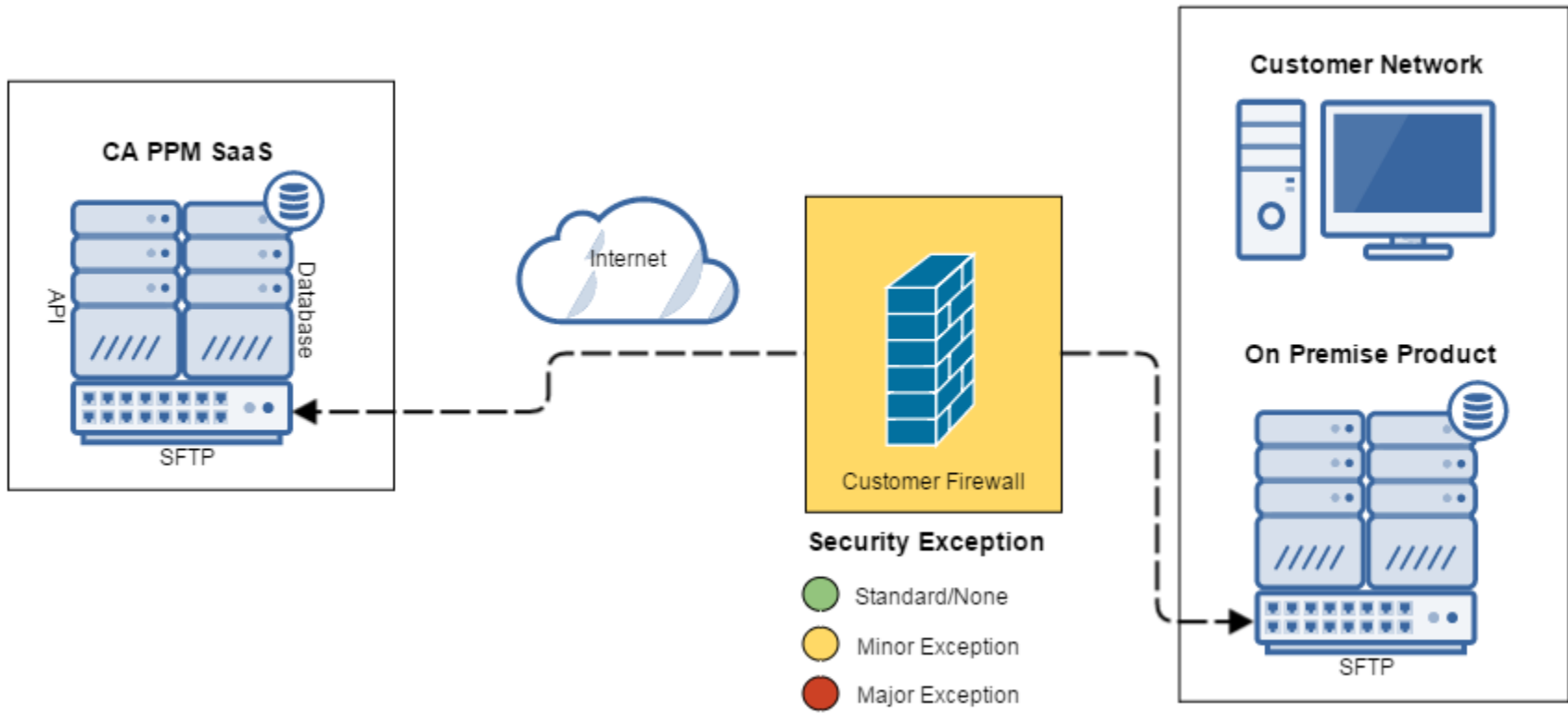
---

- 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

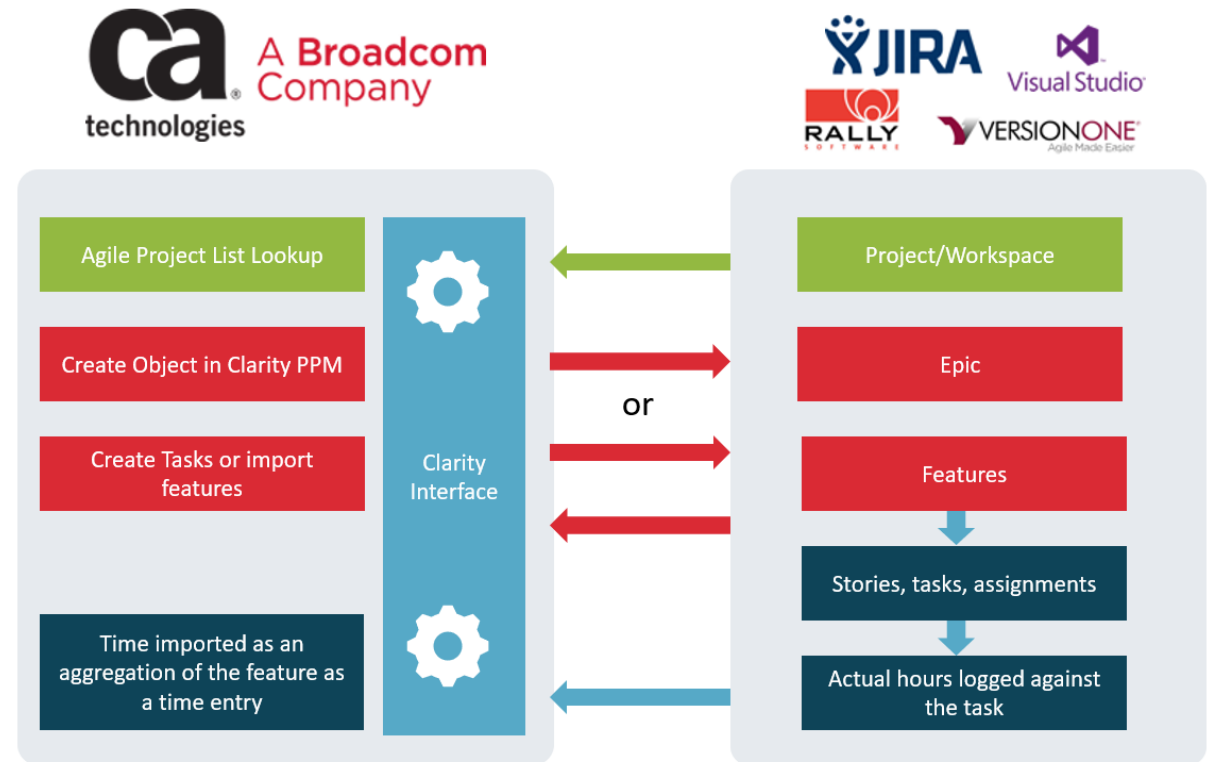
- Agile Tools
  - Who - Jira, Agile Central, V1, TFS, Rational
  - How - API
  - What - Project Lifecycle, Time Entry, Capitalization Data
- ERP/Financial Systems
  - Who - SAP, Oracle, JD Edwards, Lawson, Sage, Great Plains, Infinium, Peoplesoft
  - How - Flat file
  - What – Direct Expenses, Time Entry, 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
<b>Intro</b> <ul style="list-style-type: none"> <li>• Kick-off</li> <li>• Workshop purpose/agenda review</li> <li>• How we'll do this</li> <li>• Critical success criteria</li> </ul>
<b>Review</b>
<b>Objectives/Stories</b> <ul style="list-style-type: none"> <li>• Review submitted user stories (if applicable)</li> </ul>
<b>Mapping</b> <ul style="list-style-type: none"> <li>• Project level</li> <li>• Task level</li> <li>• Attributes</li> </ul>
<b>Financials</b> <ul style="list-style-type: none"> <li>• How do we calculate costs</li> <li>• How do we differentiate capital/operating costs if needed</li> </ul>
<b>Resources</b> <ul style="list-style-type: none"> <li>• How might resources/staffing be handled</li> </ul>

Content
<b>Time tracking</b> <ul style="list-style-type: none"> <li>• Are there any deviations needed to the standard connector time-tracking approach</li> </ul>
<b>Reporting</b> <ul style="list-style-type: none"> <li>• What metrics are needed</li> <li>• What views/reports are needed</li> </ul>
<b>Exception processes</b> <ul style="list-style-type: none"> <li>• How do we handle exceptions (i.e. story moves from one project to another, etc.)</li> <li>• What is an error vs a warning</li> </ul>
<b>Data migration approach</b> <ul style="list-style-type: none"> <li>• To go-live, how will we establish all of the connections for existing projects</li> </ul>
<b>Conclusion</b> <ul style="list-style-type: none"> <li>• Review open items/parking lot</li> <li>• Review captured stories</li> <li>• Discuss next steps</li> </ul>



# 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

# Integrations for Optimization

Free with Clarity

\$8K

IaaS

## Authentication/SSO for Streamlined User Management



## HR Integrations for Resource and Profile Management



## Reporting, Dashboards and outputs to match your standards



## Service Management for Unified Work Insights and Automation



## Ideation and Innovation for Capturing Ideas Before Investing



# Financial Management Integrations

Free with Clarity

\$8K

IaaS

### Financial Systems Integrations



Logos included: Workday, SAP, PeopleSoft, ORACLE, JDEdwards, ADP, NETSUITE, APPTIO.

### Financial Planning, Budgeting, Forecasting and Transparency



Logos included: APPTIO, ORACLE, SAP, Anaplan.

### Vendor and Time Management



Logos included: SAP Fieldglass, ADP, Beeline, KRONOS.

# Integrations for Streamlined Execution

Free with Clarity

\$8K

IaaS

## Team Collaboration and Document Sharing

SharePoint IaaS Microsoft Teams Microsoft Flow  
Trello slack

## Agile Integrations

























JIRA Rally Software  
COLLABNET VERSIONONE  
Azure DevOps targetprocess

## Account and Opportunity Management

salesforce sugarcrm  
ORACLE

## Project Management to Standardize Data

smartsheet IaaS Outlook Excel  
Project itdesign ARP asana  
monday.com MEISTERPLAN

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





# regoLink




Innovation and integrations for Clarity







Wagile Board    Action Item Responder    Enhanced MSP Integration    SQL Data Extractor    Channel Pack    Roadmap Printer

### 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?



# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at [pmi.org](https://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.



### Phone

888.813.0444



### Email

[info@regoconsulting.com](mailto:info@regoconsulting.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)

# Questions?



# Surveys

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



# Thank You For Attending Rego University

## Instructions for PMI credits

- Access your account at [pmi.org](https://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.



### Phone

888.813.0444



### Email

[info@regoconsulting.com](mailto:info@regoconsulting.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)