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Microsoft SharePoint, Teams, PowerPoint, and Excel Data Manager (EDM)

Your Guides:
Alyson Poston and Luis Palacios



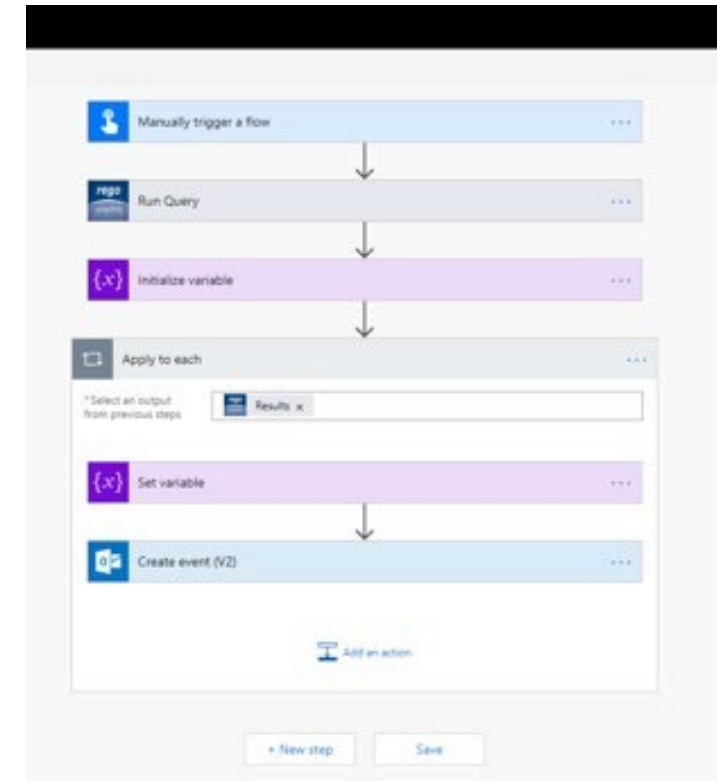
Agenda

- SharePoint and MS Teams
- Rego's PowerPoint Add-In
- Excel Data Manager (EDM)

Enhance Collaboration with Sharepoint and MS Teams

Rego's Approach

- Microsoft Certified Connector for Microsoft's Power Automate
 - Power Automate is a Microsoft 365 service to build robust automations/processes through a low-code UI
 - Interacts with the 365 ecosystem natively and includes features to easily manage, deploy and secure automations.
 - Runs within your Organization's tenant and includes functionality to easily manage and troubleshoot automations.
 - Includes Powerful functionality like notifications, approvals and hundreds of connectors.
- Rego's Connector allows Power Automate to:
 - Pull data from Clarity
 - Save data back to Clarity
 - Allows Clarity to trigger automations through its processes, providing real time integrations



Rego's Approach

- Pre-built bundles based on the most common use cases. Allowing customers to:
 - Collaboration Bundle – seamlessly create a location in M365 to store project related documents
 - RIDAC – Sync risks, issues and change requests to Clarity
 - Outlook OOO – Automatically update Clarity's resource calendars based on OOO events
 - Report Bursting – Upload status report published PDF or Jasper Reports to M365
- By using our connector, we can also implement customer specific use cases:
 - Intake via MS Forms or SP Lists
 - MS Dynamics Leads to Clarity Projects
 - Integrate with Power Apps to provide interactive Power Apps

Collaboration: the Team Space Is Created

- Easily create locations in M365 to store your files and collaborate when an Investment meets a specific criteria like being created or approved. We can also manually create by using actions.
- Integration will seamlessly create: SP Sites, SP Document Libraries, SP Folders, MS Teams or MS Team Channels.

Clarity PPM

PA Hi, PPM Administrator

PROPERTIES TEAM TASKS FINANCIAL PLANS RISKS/ISSUES/CHANGES CHARGEBACKS PROCESSES HIERARCHY COLLABORATION DASHBOARD ITD VISUAL TASK BOARD REGOLINK DOCUMENT MANAGER

Project: New Computers - Properties - Main - Project Summary

Open in Scheduler Scenario: [--Select--] Actions

Project Summary

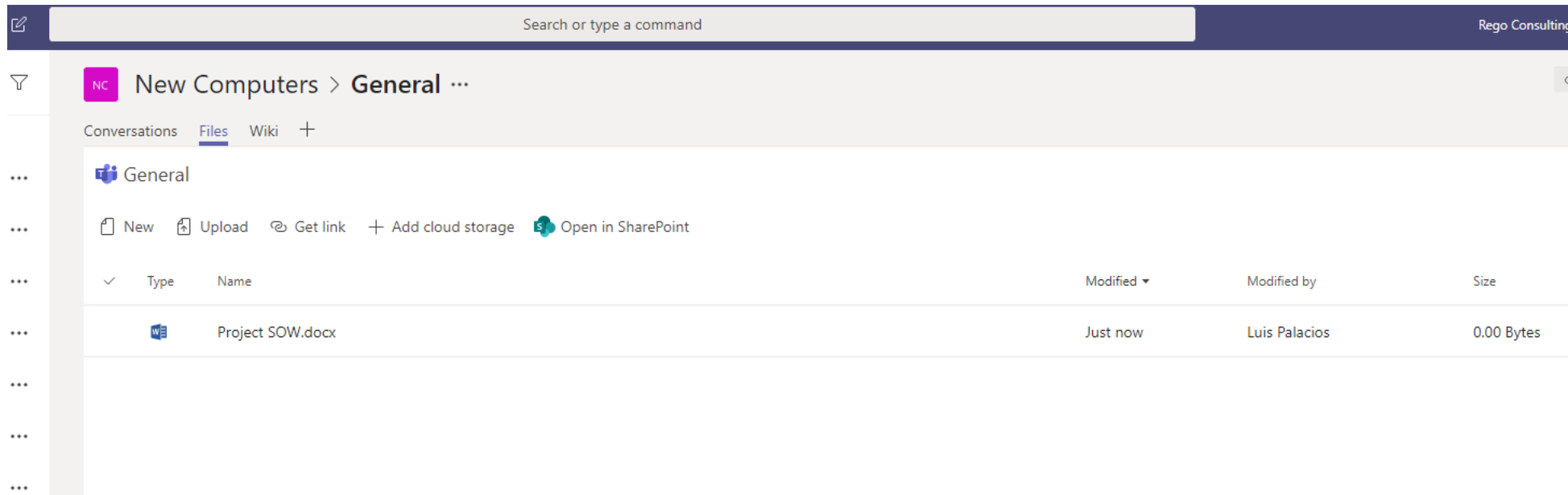
PROJECT NAME New Computers	STATUS Unapproved
PROJECT ID PRJ00123	PROGRESS Not Started
PROJECT TYPE [--Select--]	WORK STATUS Requested
PROJECT CATEGORY [--Select--]	STATUS REPORTING Not Required
OBJECTIVE	STAGE
	START DATE 12/5/2019
	FINISH DATE 12/5/2019

General

- Add to My Projects
- Copy Project from Template
- Go to Links Page
- Go to Notes page
- Create SharePoint Site
- Sync SharePoint Permissions
- Create Microsoft Team
- Sync Microsoft Team Members

Collaboration: the Team Space Is Created

- The container will follow a pre-defined naming convention to match your organization needs. Like using the project name, departments or other fields.
- Automatically pre-populate with a default folder and file structure to streamline business processes and data governance.
- Native functionality can be used once the container is created.
- The container will then continuously sync permissions based on Clarity. Using Project Managers, Staff and even custom fields to map additional users within M365.



Collaboration: Document Manager – Modern UX

- Seamlessly use Rego's Document Manager to browse the files with Clarity to avoid switching applications.
- Document Manager works based on SharePoint, so files won't be duplicated.
- It also uses M365 and SharePoint permissions to allow users to only access documents they have access to.

The screenshot shows the Clarity application interface with the 'Document Manager' tab selected. The top navigation bar includes 'clarity', a 'Project' link, and a status indicator for 'SAP HANA Rollout PR1331' marked as 'On Track'. The main content area is titled 'RegoLink Document Manager' and features a 'Document Library' section with a 'Documents' dropdown. Below this are action buttons: '+ New Folder', 'Upload File(s)', 'Delete File(s)', 'Open in SharePoint', and 'Refresh'. The 'Documents > General' view displays a table with columns for 'Name', 'Owner', 'Modified By', and 'Last Modified'. A single document, 'Project SOW.docx', is listed with owner 'Luis Palacios' and modified date '2019-12-05'. A context menu is open over the document, showing options: 'Open in SharePoint', 'Download', and 'Delete'. A 'Sign out' link for 'luis.palacios@regoconsulting.c' is visible in the top right corner.

clarity ← Project

SAP HANA Rollout PR1331 On Track

Properties Conversations Staff Tasks Links Financials Risks Issues Changes Status Task List Financial Plans Document Manager

RegoLink Document Manager

Document Library

Documents

+ New Folder Upload File(s) Delete File(s) Open in SharePoint Refresh

Documents > General

Name	Owner	Modified By	Last Modified
Project SOW.docx	Luis Palacios	Luis Palacios	2019-12-05

Open in SharePoint
Download
Delete

Sign out luis.palacios@regoconsulting.c

Other Use Cases



RIDAC – Risks, Issues, and Change Requests through Lists

Clarity PPM - DEV

DASHBOARD PROPERTIES TEAM TASKS FINANCIAL PLANS HIERARCHY RISKS/ISSUES/CHANGES COLLABORATION ON GOING COSTS CHARGEBACKS PROJECT STORYBOARD

Project: Clarity MS Teams Integration Testing - *Risks/Issues/Changes* - Risks

Filter: System Default

Risk	ID	Status	Owner	Priority	Probability	Calculated Risk	Target Resolution Date	Resolved Date	Resolved By	Category	Last Updated By	Originating Issue/Risk
☐ Risk 1	RI0230	Open	Lyons, Stacy	🟡	🟡	🟢	8/29/21			Flexibility	Administrator, Clarity	
☐ Risk from MS Teams	1630335205	Open	Lyons, Stacy	🟡	🟡	🟡	9/24/21			Implementation	Flow, Clarity	
☐ Risk 2	RI0231	Open	Lyons, Stacy	🔴	🟡	🔴	12/31/21			Implementation	Lyons, Stacy	

Displaying 1 - 3 of 3

SAVE NEW DELETE

Create your risks/issues in Clarity or in Teams and have them reflected in the Other system.

The connector can also sync other objects including custom into SP Lists.

Microsoft Teams

Teams

General

Clarity Risks

Title	Risk ID	Category	Status	Owner	Target Resolution D...
Risk 2	RI0231	Implementation	Open	Lyons, Stacy J	12/31/2021
Risk 1	RI0230	Flexibility	Open	Lyons, Stacy J	8/29/2021
Risk from MS Teams	1630335205	Implementation	Open	Lyons, Stacy J	9/24/2021

Integrate Outlook Calendars with Clarity

- Easily sync:
 - Key Project Dates to shared Calendars for visibility across external users.
 - Out of Office Events to Resource Calendars / Availability

Filter: None ▾

Task Name

Task ID

Key Task All ▾

Tasks Only All ▾

Start to

Finish to

Filter Show All Save Filter Clear

☐	Task	Task ID	Start	Finish	Baseline Fini
☐	My Milestone 1 ◆	TSK001	2/6/19	2/6/19	
☐	My Milestone 2 ◆	TSK002	2/12/19	2/12/19	

My Milestone 1 - Event

File Event Insert Format Text Review Help Tell me what y

Appointment Scheduling Assistant

Skype Meeting Online Meeting Teams Meeting Meeting Notes

Subject

Location

Start time 12:00 AM ☐ All day event

End time 12:00 AM

Integrate Outlook Calendars with Clarity

- Sync Out Office events with your Clarity calendar

Out of Office - Black Friday - Event

File Event Insert Format Text Review Help Tell me what you want to do

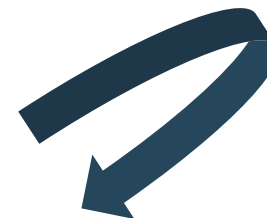
Save & Close Delete Forward Appointment Scheduling Assistant Skype Meeting Teams Meeting Invite Attendees Show As: Out of O... Reminder: 18 hours Recurrence Time Zones Categorize High Importance Low Importance Dictate Voice

Subject: Out of Office - Black Friday

Location: Home

Start time: Fri 11/23/2018 12:00 AM Chennai, Kolkata, Mumbai ☒ All day event

End time: Fri 11/23/2018 12:00 AM Chennai, Kolkata, Mumbai



Resource - Labor: Account Demo - Edit Resource Calendar

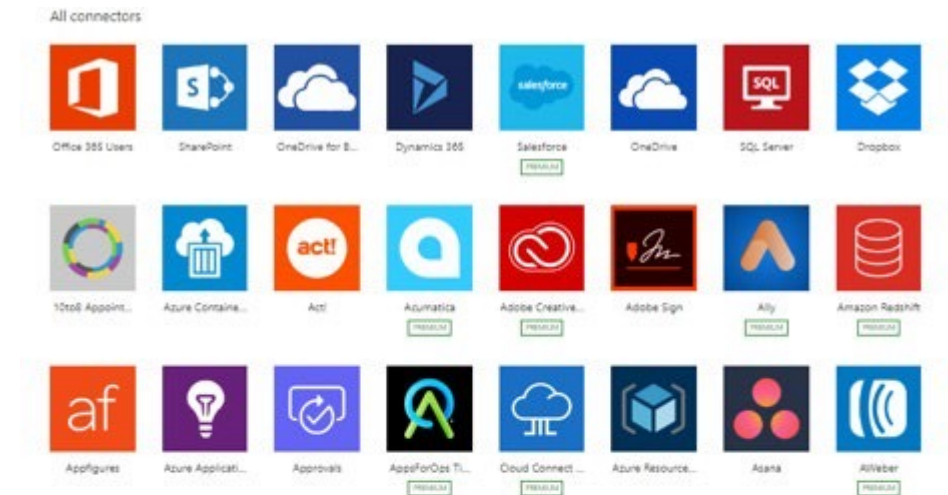
November 2018

To specify the same week day in the entire calendar, check a day of the week. To specify an individual day, check a date in the month.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

And Much More

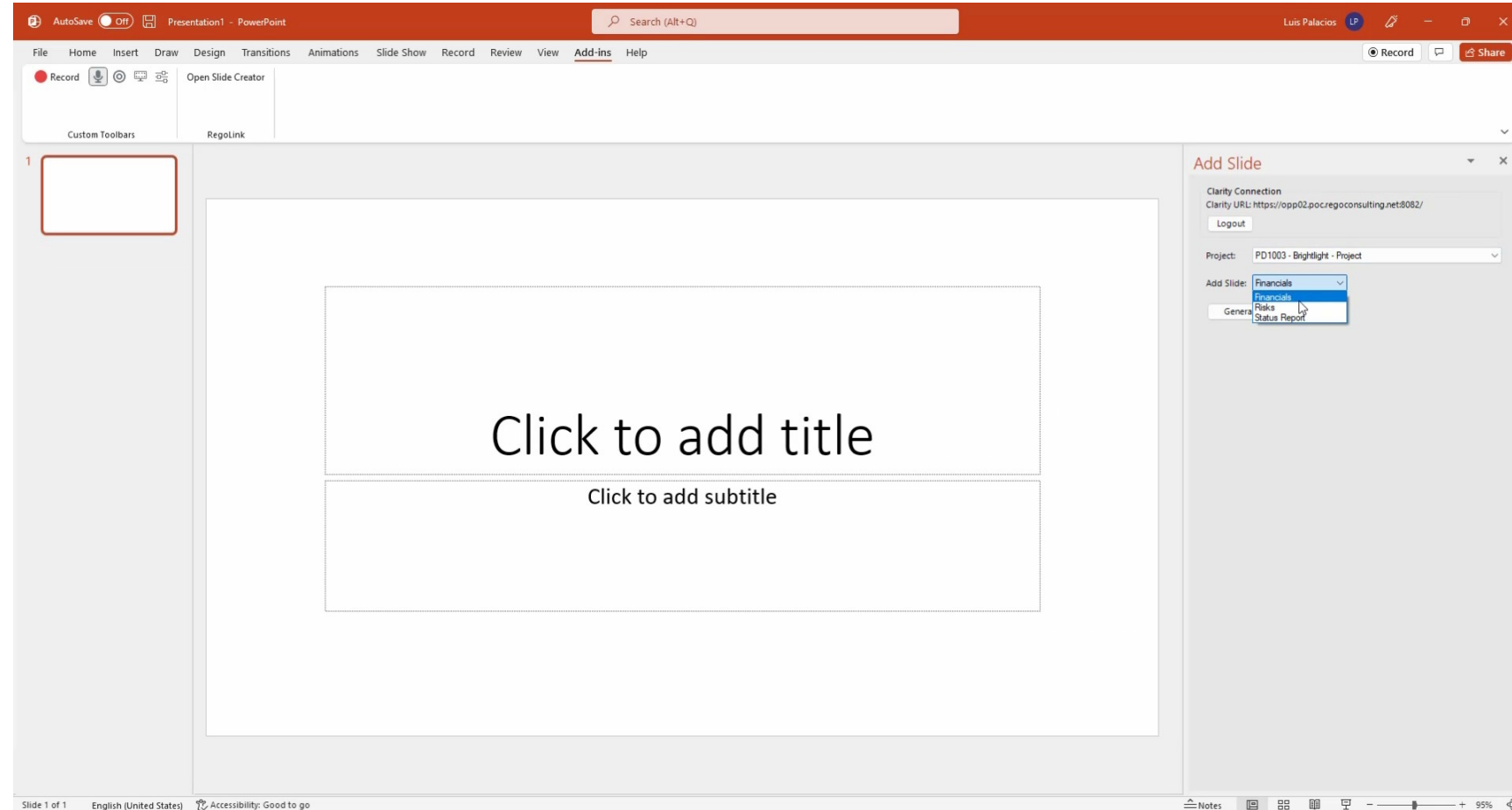
- Generate Jasper Reports or Export Status Report PDFs automatically to share deliverables with stakeholders
- Intake Ideas via MS Forms or SP Lists
- Plus, hundreds of Connectors within Power Automate



PowerPoint Add-In

Rego's Power Point Add-In

- Power Point Desktop based Add-In, allows power users to seamlessly generate slides based of Clarity data
- Users can pick pre-defined slide templates and projects to generate slides
- The templates support content generation for:
 - Tables
 - Custom formatted slides
 - Native charts
- Slides can be modified once generated



Rego's Power Point Add-In

- Tables will automatically size to fit and create multiple slides depending on the number of records.

PD1003 - Brightlight - Project Risks

Name	Description	Category	Priority	Probability	Impact	Status	Owner	Impact date	Target resolution date
Significant change in scope from stakeholders		Objectives	Low	Low	Low	Open	Administrator, Clarity	07-01-2022	07-01-2022

Slide 2 of 2 | English (United States) | Accessibility: Investigate

Rego's Power Point Add-In

- Custom formatted slides allow for styles and layout to be customized to present the data in different formats.

The screenshot shows a PowerPoint presentation titled 'PD1003 - Brightlight - Project Status Report'. The slide contains a table with project details and a list of projects on the right.

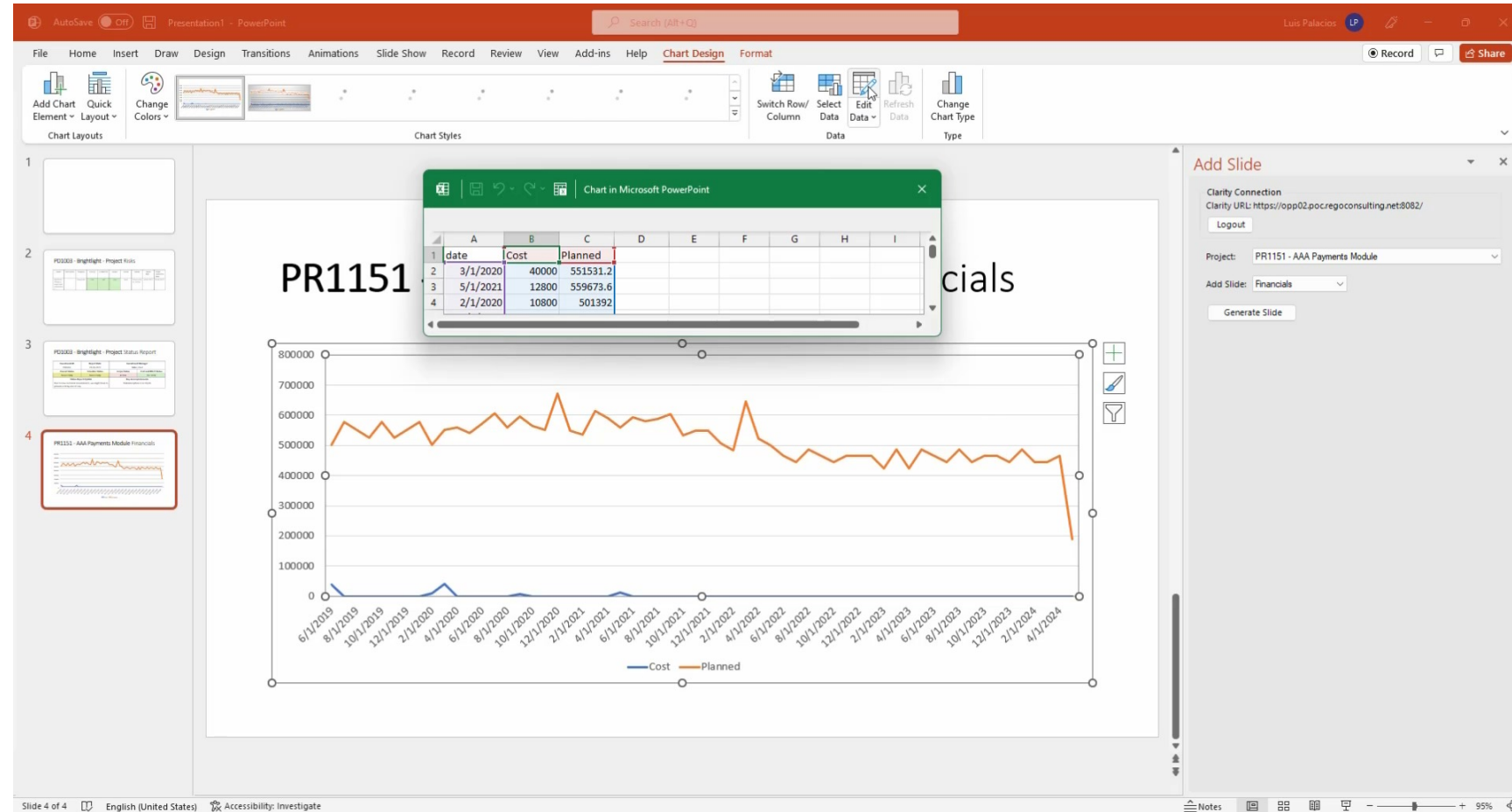
Investment ID	Report Date	Investment Manager	
PD1003	07-01-2022	Miles, Paul	
Overall Status	Schedule Status	Scope Status	Cost and Effort Status
Needs Help	Needs Help	At Risk	On Track
Status Report Update		Key Accomplishments	
Due to new customer requirements, we might have to provide a CR by end of July		Delivered phase 1 on 06/30	

The right sidebar shows a list of projects under the heading 'Add Slide'. The list includes:

- PD1003 - Brightlight - Project
- PD1012 - Adventure - New Option
- PG1000 - Online Web Portal Program
- PG1001 - Revamp online presence
- PRS1000 - A Finance Process Change
- PRS1012 - Minimal Online Shopping Site
- PR1002 - eCommerce Portal
- PR1005 - Client Services Datamart
- PR1011 - eBusiness Mobile Network
- PR1012 - Order Trending Analysis
- PR1016 - Automated Security Enhancements
- PR1017 - Financial Process Audit
- PR1020 - HR Claims Processing Enhancement
- PR1021 - HR Online Benefits Security Upgrade
- PR1024 - Change Mgt for Internal Portal
- PR1027 - Data Warehouse Performance Tuning
- PR1028 - CRM Contact Center Development
- PR1029 - CRM Enhancements
- PR1033 - Meeting Reservation Portal
- PR1034 - BI Analytics
- PR1035 - Social Networking Security Upgrade
- PR1039 - Mobile Advertising
- PR1041 - Mobile Commerce
- PR1095 - A Collaboration Initiative
- PR1132 - A Portfolio Initiative
- PR1134 - AC SAFe Implementation
- PR1151 - AAA Payments Module
- PR1156 - AP Architecture Consolidation
- PR1165 - Connection Clarity
- PR1186 - Application for Inventory Management

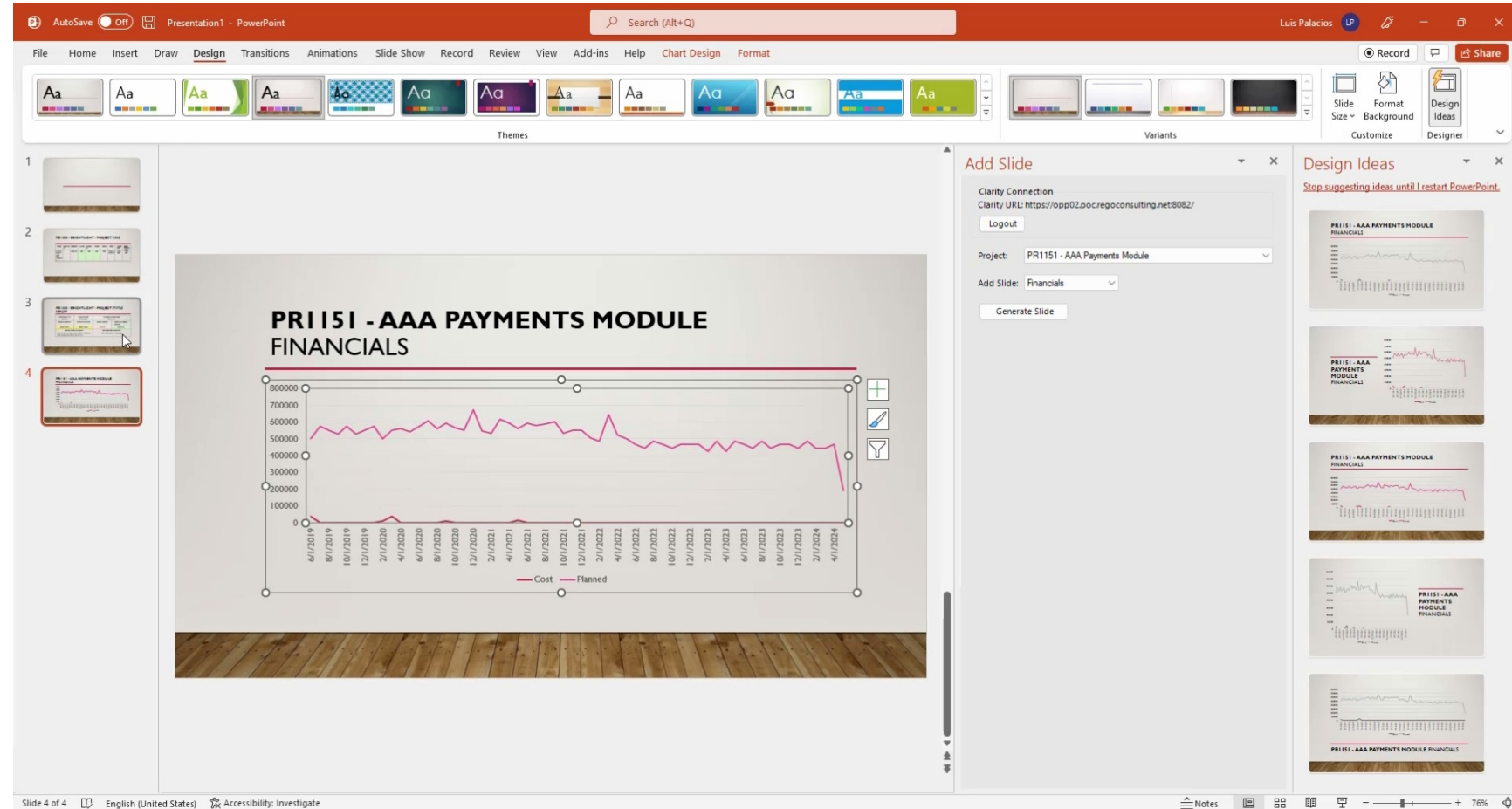
Rego's Power Point Add-In

- Charts will be generated using native MS Office charts
- Allowing users to edit the data through MS Excel



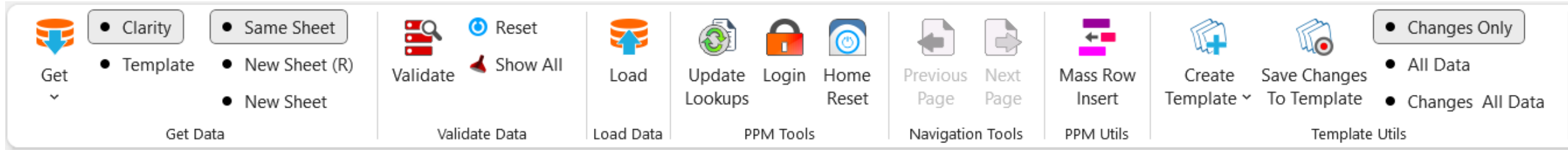
Rego's Power Point Add-In

- Use native functionality like design templates, apply styles and add transitions seamlessly.



Excel Data Manager

Overview



- Allocations
- Applications
- Assets
- BenefitPlans
- ChangeReq
- Companies
- CostPlans
- Ideas
- Incidents
- Issues
- Locations
- Lookups
- Others
- Products
- Programs
- Projects
- ProjectTeams
- Ratematrix
- ReleasePlans
- Releases
- Requirements
- Resources
- Risks
- Roles
- Services
- Skills
- StatusReport
- TaskETC
- Tasks
- Users
- Bi-directional utility that allows users to
 - Extract – either directly from Clarity or from a template
 - Modify – update the results inline using Excel’s functionality like (filters, sorting, copy and paste, drag and drop, etc). While enhancing the experience with Clarity specific logic like data types and lookups presented as drop downs
 - Validate – check the data in a manner consistent with how Clarity does it: required, lookups based, max length, numerical ranges, date constraints
 - Load - Send large data sets through Rego’s Data Processor (included with EDM)
- Delivered as an Excel macro with a custom ribbon and 30 sample interfaces with 20-25 attributes each
- Easy to extend and customize
- Communications with Clarity are via API and using Rego’s Data Processor making it compatible with all hosting solutions

Get Data

- Get Data by relying on Clarity's API and NSQL queries.
- Allows users to filter prior to downloading for a tailored experience.
- By relying on Clarity's access rights, Users can only see the same data they can see in Clarity
- Easily generate Sheet templates to import data manually entered or from other sources by copying into Excel

Edit Data

- Modify Data via Excel functionality like dragging values down and/or across, copy/paste, search/replace, vlookup, formulas
- Modified cells background color is changed as a visual aid to the user
- Only modified and required fields are sent to Clarity for update
- Required field labels are prefixed with *
- Lookup based attributes use Excel Validation Lists (in cell drop downs)
- Support for Static, Dynamic, Dependent & Multi Value Lookups

	A	B	C	D	E	F	G	H	I	J
1	*Project Name	*Project Id	Manager	Status	*Is Active	Is Template	Template	*Start Date	*End Date	Progress
2	A Avian Flu Case Tracking System New Test	PR001358	Matt Young	Approved	TRUE	FALSE		2022-01-01	2022-12-31	Not Started
3	A Avian Flu Case Tracking System New Test	PR001357	Matt Young	Approved	TRUE	FALSE		2022-01-01	2022-12-31	Not Started
4	A CMS Idea 10 - Test of fields copied to the project on conversion from Idea	PR001380	Matt Young	Converted	abc	FALSE		2023-04-29	2023-04-27	Not Started
5	A CMS Test Project	PR001338	Matt Young	Unapproved	TRUE	FALSE		2022-04-14	2022-04-14	Not Started
6	A Patrick Test 2 <-	PR001287	Matt Young	Cancelled Converted Incomplete On Hold Rejected Resumed Submitted for A	TRUE	FALSE		2020-04-14	2022-09-30	Not Started
7	A Test Idea for Conversion Project	PR000479	Matt Young	Submitted for A	TRUE	FALSE		2017-01-01	2022-10-28	Started
8	AA ABV Test	PR000938	Matt Young	Unapproved	TRUE	FALSE		2017-01-01	2022-03-31	Not Started

Supports Time Scaled Values

- Samples for Cost Plans, Benefit Plans, Allocations and Task ETC
- Provides a fixed number of periods extracted for a tailored experience
- Periods outside of the configured boundaries as read only

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	*Investment	*Investment ID	*Resource ID	*Resource Name	*Task ID	*Task Name	Start Date	Finish Date	ETC to Distribute	*Nov 2022	*Dec 2022	*Jan 2023	*Feb 2023	*Mar 2023
2	EDM TaskETC	PR000992	aalcala	Anthony Alcala	TSK_001	Task 1	2020-12-01	2024-01-30			49.31	49.31	44.83	51.55
3	EDM TaskETC	PR000992	andres.anon	Andres Anon	TSK_001	Task 1	2020-12-01	2024-01-30			49.31	49.31	44.83	51.55
4	EDM TaskETC	PR000992	cm_jaeson	Jason Aeson	TSK_001	Task 1	2020-12-01	2024-01-30			97.35	97.35	88.50	101.78

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	*Investment	*Investment ID	*Plan Name	*Plan Code	*Charge Code	*Cost Type	Total Cost	*Nov 2022	*Dec 2022	*Jan 2023	*Feb 2023	*Mar 2023	*Apr 2023	*May 2023
2	EDM CostPlan Test	PR000821	EDM test	CP000375	Capital Expense	AA_ContractorT1	\$998,433	50000	50000					
3	EDM CostPlan Test	PR000821	EDM test	CP000375	Capital Expense	Capital	\$998,244	50000	50000					
4	EDM CostPlan Test	PR000821	EDM test	CP000375	Capital Expense	L1	\$998,100	50000	50000					

Validate Data



Validate Data

- Data cells that fail validation have their background color changed and a comment with details of the error
- Configurable per attribute message
- Required fields, Data Types, excel functions like length, Clarity Lookups or custom macro's like checking for duplicates in Team, Tasks, Cost Plans or Ratematrix

	A	B	C	D	E	F	G	H	I
1	*Project Name	*Project Id	Manager	Status	*Is Active	Is Template	Template	*Start Date	*End Date
2	A Avian Flu Case Tracking System New Test	PR001357	Matt Young	Approved	TRUE	FALSE		2022-01-01	2022-12-31
3	A Avian Flu Case Tracking System New Test			Approved	TRUE	FALSE		2022-01-01	2022-12-31
4	A CMS Idea 10 - Test of fields copied to the project on conversion from Idea			Converted	abc	FALSE		2023-04-29	2023-04-27
5	A CMS Test Project			Approved	TRUE	FALSE		2022-04-14	2022-04-14
6	A Patrick Test 2 <-			Approved	TRUE	FALSE		2020-04-14	2022-09-30
7	A Test Idea for Conversion Project			Approved	TRUE	FALSE		2017-01-01	2022-10-28
8	AA ABV Test			Unapproved	TRUE	FALSE		2017-01-01	2022-03-31

	A	B	C	D	E	F	G	H	I	J
1	*Project Name	*Project Id	Manager	Status	*Is Active	Is Template	Template	*Start Date	*End Date	Progress
2	A Avian Flu Case Tracking System New Test	PR001358	Matt Young	Approved	TRUE	FALSE		2022-01-01	2022-12-31	Not Started
3	A Avian Flu Case Tracking System New Test	PR001357	Matt Young	Approved	TRUE	FALSE		2022-01-01	2022-12-31	Not Started
4	A CMS Idea 10 - Test of fields copied to the project on conversion from Idea	PR001380	Matt Young	Converted	abc	FALSE		2023-04-29	2023-04-27	Not Started
5	A CMS Test Project	PR001338	Matt Young	Unapproved	TRUE	FALSE		2022-04-14	2022-04-14	Not Started

Load Data



Load

Load Data

- Data is sent to a staging object in Clarity to be processed by Data Processor framework
- Data can be transformed before being sent and as its processed by the Data Processor
- Loaded cells change color as a visual aid to let the user know what was sent
- Configurable notification email sent to user with a summary of the load results

A				E	F	G	H	I
1	*Project Name			*Is Active	Is Template	Template	*Start Date	*End Date
2	A Avian Flu Case Tracking System New Test			TRUE	FALSE		2022-01-01	2022-12-31
3	A Avian Flu Case Tracking System New Test			TRUE	FALSE		2022-01-01	2022-12-31
4	A CMS Idea 10 - Test of fields copied to the project on conversion from Idea			TRUE	FALSE		2022-04-29	2023-04-27
5	A CMS Test Project							
6	A Patrick Test 2 <-							
7	A Test Idea for Conversion Project							
8	AA ABV Test							
9	AA ABV Test - BP1	PR000941	Matt Young	Unapproved				
10	AA ABV Test - Infrastructure	PR000943	Matt Young	Unapproved				
11	AA ABV Test - Major Project	PR000944	Matt Young	Unapproved	TRUE	FALSE	2020-04-14	2021-11-22

1	*Project Name	*Project Id	Manager	Status	*Is Active	Is Template	Template	*Start Date	*End Date	Progress
2	A Avian Flu Case Tracking System New Test	PR001358	Matt Young	Approved	TRUE	FALSE		2022-01-01	2022-12-31	Not Started
3	A Avian Flu Case Tracking System New Test	PR001357	Matt Young	Approved	TRUE	FALSE		2022-01-01	2022-12-31	Not Started
4	A CMS Idea 10 - Test of fields copied to the project on conversion from Idea	PR001380	Matt Young	Converted	TRUE	FALSE		2022-04-29	2023-04-27	Not Started
5	A CMS Test Project	PR001338	Matt Young	Unapproved	TRUE	FALSE		2022-04-14	2022-04-14	Not Started

Progress Indicator

100% Completed

Total Requests

1

Current Request

0

Inserted

1

Inserted

1

Updated

0

Updated

0

Failed

0

Failed

0

Total

1

Total

1

Inbound Load Result



Your request has been submitted.

Please check your email for load results.

OK

Questions?





Master Clarity with Rego University

Earn Certifications in
Administration, Leadership,
and Technical Proficiency

Let Rego be your guide.



Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to continue our **certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **Eligibility:** Open to all Rego University attendees



Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

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
- 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 = **Rego University**
- 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



Website

www.regouniversity.com

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