LAS VEGAS

regoUniversity 2025

Sponsored by ValueOps by Broadcom | Clarity by Broadcom | Rally by Broadcom | ConnectALL by Broadcom | Insights by Broadcom

Using MSP and Smartsheet with Clarity

Your Guides:
Alyson Poston and Luis Palacios

Gold Sponsor
aws

Agenda

- Rego's MSP Add-In
- Smartsheet to Clarity
  - Clarity to Smartsheet Extract
  - Clarity to Smartsheet Integration

Rego’s MSP Add-In

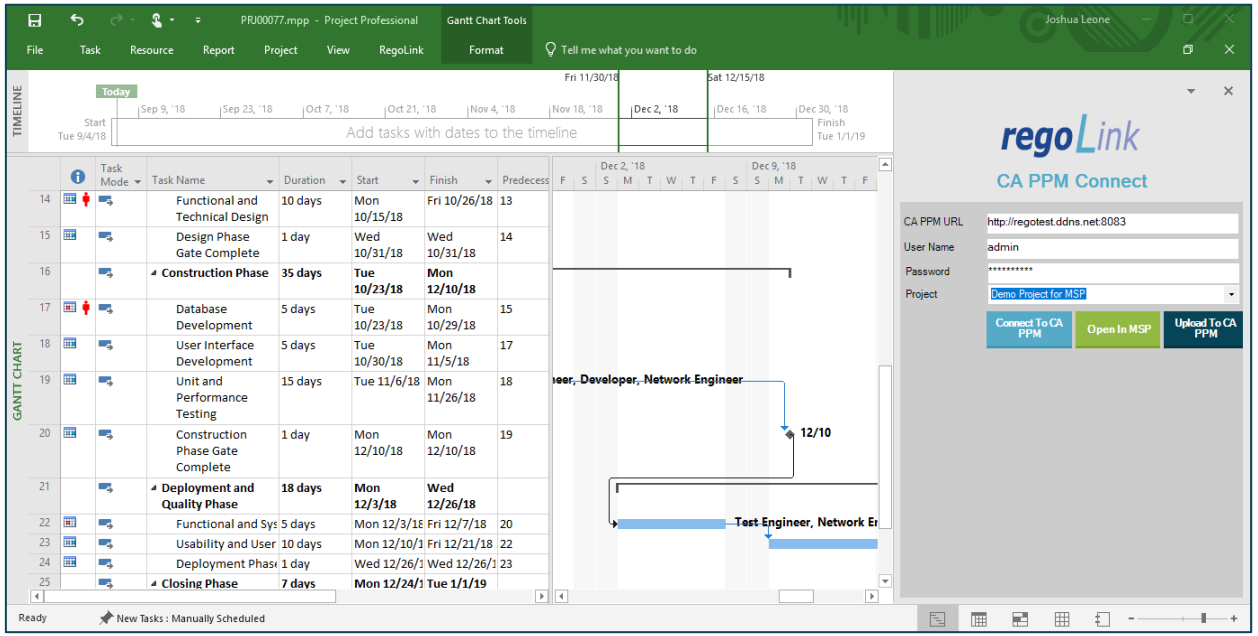
MSP – Built from the Ground Up

Must be able to handle export and import of 10,000 line projects

Must perform well

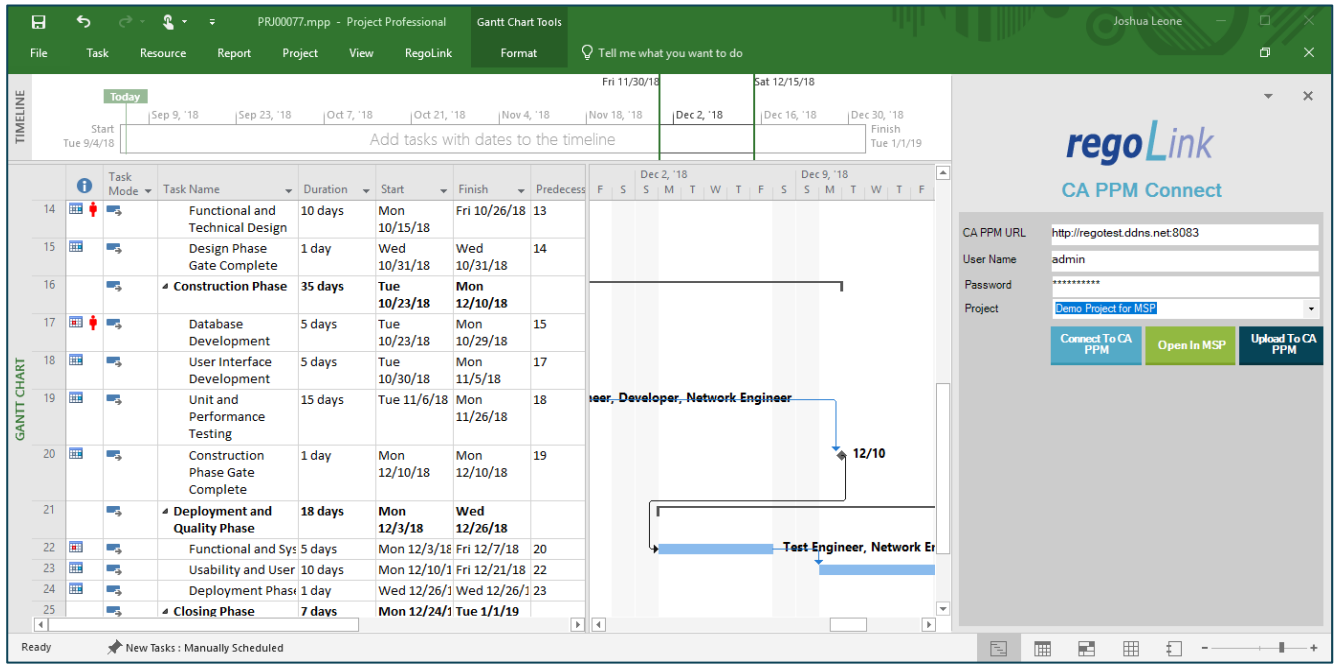
Must be easy to install and support

Must use the latest and greatest technology



Enhanced Microsoft Project

- Relies on .NET framework, providing compatibility with MS products
- Can connect to AWS, GCP and On Prem environments, by using Clarity authentication or SSO
- Optimized for fast saving, by relying on Clarity to perform server side validations and update the projects.
- 50%+ faster than the OOTB MSP Connector
- Provides:
  - Task Management
    - Phase, Tasks, Milestones
  - Dependencies
  - Resource Assignments
    - As assigned to the team in Clarity; Multiple assignees supported
  - Custom Field Support on the tasks
    - As defined in the OOTB MSP mapping object



MSP – Key Differences

Key Differences Between OOTB MSP & Rego Connector

	OOTB	Rego
Schedule Connect & Add-in Macro install Application required	✓	
Server Side Data Processing/Validation—Light client		✓
Support for Click-to-Run, Project Online Desktop, Project 2016, Project 2019	✓	✓
Enhanced Error and Validation Client Messages		✓
Bi-Directional sync of project/task/assignments	✓	✓
Mapping of custom fields and Static lookups	✓	✓
Support of dynamic lookups		✓
Support of Mapped Field Labels to MSP		✓
Resource Calendar Management in MSP		✓
Ability to Save As a New project to CA PPM	✓	Planned
Baseline Support	✓	✓
Master/Subproject	✓	
Partial project import to Clarity PPM		✓
Interproject dependency Support	✓	✓
Resource Rates Support	✓	✓

Gantt View

PRJ00077.mpp - Project Professional | Gantt Chart Tools | Joshua Leone

File | Task | Resource | Report | Project | View | RegoLink | Format | Tell me what you want to do

TIMELINE

Today | Fri 11/30/18 | Sat 12/15/18

Sep 9, '18 | Sep 23, '18 | Oct 7, '18 | Oct 21, '18 | Nov 4, '18 | Nov 18, '18 | Dec 2, '18 | Dec 16, '18 | Dec 30, '18

Start Tue 9/4/18 — Add tasks with dates to the timeline — Finish Tue 1/1/19

GANTT CHART

	Task Mode	Task Name	Duration	Start	Finish	Predecess
14		Functional and Technical Design	10 days	Mon 10/15/18	Fri 10/26/18	13
15		Design Phase Gate Complete	1 day	Wed 10/31/18	Wed 10/31/18	14
16		**Construction Phase**	**35 days**	**Tue 10/23/18**	**Mon 12/10/18**	
17		Database Development	5 days	Tue 10/23/18	Mon 10/29/18	15
18		User Interface Development	5 days	Tue 10/30/18	Mon 11/5/18	17
19		Unit and Performance Testing	15 days	Tue 11/6/18	Mon 11/26/18	18
20		Construction Phase Gate Complete	1 day	Mon 12/10/18	Mon 12/10/18	19
21		**Deployment and Quality Phase**	**18 days**	**Mon 12/3/18**	**Wed 12/26/18**	
22		Functional and Sys	5 days	Mon 12/3/18	Fri 12/7/18	20
23		Usability and User	10 days	Mon 12/10/1	Fri 12/21/18	22
24		Deployment Phase	1 day	Wed 12/26/1	Wed 12/26/1	23
25		**Closing Phase**	**7 days**	**Mon 12/24/1**	**Tue 1/1/19**	

Dec 2, '18 | Dec 9, '18

F S S M T W T F S S M T W T F

eer, Developer, Network Engineer

12/10

Test Engineer, Network Er

regoLink

CA PPM Connect

CA PPM URL: http://regotest.ddns.net:8083

User Name: admin

Password: **********

Project: Demo Project for MSP

Connect To CA PPM | Open In MSP | Upload To CA PPM

Ready | New Tasks : Manually Scheduled

Resource Sheet

PRJ00226.mpp - Project Professional | Resource Sheet Tools | Taunya Moore

File | Task | Resource | Report | Project | View | RegoLink | Help | CA PPM Integration | Format | Tell me what you want to do

Gantt Chart | Task Usage | Task Board | Network Diagram | Calendar | Other Views — Task Views

Team Planner | Resource Usage | Resource Sheet | Other Views — Resource Views

Sort | Outline | Tables | Highlight: [No Highlight] | Filter: [No Filter] | Group by: [No Group] — Data

Timescale: Days — Zoom | Entire Project | Selected Tasks

Timeline | Details — Split View

New Window — Window

Macros — Macros

TIMELINE

Today

Start 11/26/18 8:00 AM | Dec '18 | Jan '19 | Feb '19 | Mar '19 | Apr '19 | Finish 4/9/19 5:00 PM

Add tasks with dates to the timeline

RESOURCE SHEET

	Resource Name	Type	Material	Initials	Group	Max.	Base	Code
1	Developer	Work		csk.develop		100%	Standard	csk.developer
2	Project Manager	Work		csk.projectM		100%	Standard	csk.projectManager
3	Test Engineer	Work		csk.testEngi		100%	Standard	csk.testEngineer
4	Architect	Work		csk.architec		100%	Standard	csk.architect
5	Business Analyst	Work		csk.busines		100%	Standard	csk.businessAnalyst
6	Network Engineer	Work		csk.network		100%	Standard	csk.networkEngineer
7	Storage Architect	Work		csk.storageA		100%	Standard	csk.storageArchitect
8	Sridhar Bandaru	Work		sri		100%	Standard	sri
9	James Butt	Work		jbutt		100%	Standard	jbutt
10	Joshua Leone	Work		jleone		100%	Standard	jleone
11	Taunya Moore	Work		tmoore		100%	Standard	tmoore

regoLink

CA PPM Connect

CA PPM URL: http://regotest.ddns.net:8083

User Name: admin

Password: **********

Project: TaunyaDemo

Connect To CA PPM | Open In MSP | Upload To CA PPM

Descriptive Error Handling

PRJ00226.mpp - Project Professional

Resource Shawn Moore; is not from CA PPM.
Assignments on Summary Task Design Phase; are not allowed.

OK

regoLink

CA PPM Connect

http://regotest.ddns.net:8083

admin

****

TaunyaDemo

Open In MSP

Upload To CA PPM

Free Trial

Free Trial Offer

- Rego is offering a free 30-ish day trial. Try out the connector in a non-production environment.
- Reach out to your account manager to get started.

Smartsheet to Clarity Integration

Clarity to Smartsheet Data Extractor

CA PPM to Smartsheet Extract

- Write Extracts in Clarity through the UI using a configuration custom object.
- Create Smartsheet Templates in Smartsheet to be used by the Extracts.
- Integration can create a new sheet every time or overwrite an existing sheet.
- Extracts can be scheduled via Jobs or ran On Demand.

Creating an Extract

smartsheet partner

PROPERTIES ▾ PROCESSES

Clarity to Smartsheet Extract: Project List - General - *Properties*

General

NAME
Project List

SMARTSHEET BASIC URL
https://api.smartsheet.com/2.0 GO

SMARTSHEET TOKEN
[redacted]

WORKSPACE ID
7865616511068036

TEMPLATE ID
5135791843921796

SMARTSHEET NAME
Project List -

FILE DATE STAMP FORMAT
yyyy-MM-dd
((Example: yyyy-MM-dd'T'hhmmss))

EXISTING SHEET ID (IN CASE NEED TO UPDATE, KEEP BLANK IF NEW SHEET NEEDS TO CREATE)

EXTRACT SQL

```
SELECT
INVI.NAME "Project Name",
INVI.CODE "Project ID" ,
to_char(INVI.SCHEDULE_START,'yyyy-mm-dd"T"hh24:mi:ss') "Start Date" ,
case when INVI.IS_ACTIVE=1 then 'true' else 'false' end "Active" ,
SR.EMAIL "Manager"
FROM INV_INVESTMENTS INVI
LEFT JOIN SRM_RESOURCES SR ON SR.USER_ID=INVI.MANAGER_ID
WHERE INVI.IS_ACTIVE=1
ORDER BY 1
```

LOG MESSAGE
Success.

NUMBER OF RECORDS
46

Creating an Extract

smartsheet partner

SSCreate

Actions

Name	Sharing	Owner	Last Update
Project List	Workspace	Shekhar Kanade	08/20/24
Project List	Workspace	Shekhar Kanade	08/20/24
Project List -2024-08-27	Workspace	Shekhar Kanade	08/27/24
Template of Project List Template- Final	Workspace	Shekhar Kanade	08/13/24

File Automation Forms Connections

Project List -2024-08-27

Grid View Filter Arial 10

	Project Name	Project ID	Start Date	Active	Manager
1	Application COTS T	csk.appCOTS	04/09/24	☑	
2	Application Change	csk.appChange	04/09/24	☑	
3	Associations Projec	PR00000005	08/05/24	☑	W weerit.nopcharoen
4	Automation and Rot	PR00000014	08/26/24	☑	BH brian hazelzet
5	Clarity Express Test	1111	07/11/24	☑	TM Taunya Moore
6	Coffee	cof001	08/26/24	☑	W weerit.nopcharoen
7	Demise Legay Attrib	ID000001	06/26/24	☑	
8	Demo Project for Ri	PR000001	06/01/24	☑	VS Venkitta Subraman
9	Gates	gates	06/18/24	☑	W weerit.nopcharoen
10	Infrastructure Deplo	csk.infrastructure	04/09/24	☑	
11	Innovation Demo - I	RI00008	07/29/24	☑	
12	Innovation Demo - F	PR00000004	07/29/24	☑	
13	Investment No Pare	invNoParent	08/26/24	☑	W weerit.nopcharoen

Manage Clarity Projects in Smartsheet

LAS VEGAS
regoUniversity
2025

Clarity to Smartsheet Integration

- Create your projects in Clarity and sync to Smartsheet.
- All initial tasks will automatically be created in a Project specific sheet.
- Use Smartsheet to perform updates and interact with external users.
- Data will sync through scheduled jobs and display a sync status in Clarity with details on the mapped sheets and last sync.
- The Integration supports:
  - Tasks
  - Risks
  - Issues
  - It can also be customized to include additional fields

smartsheet partner

Project Initiation

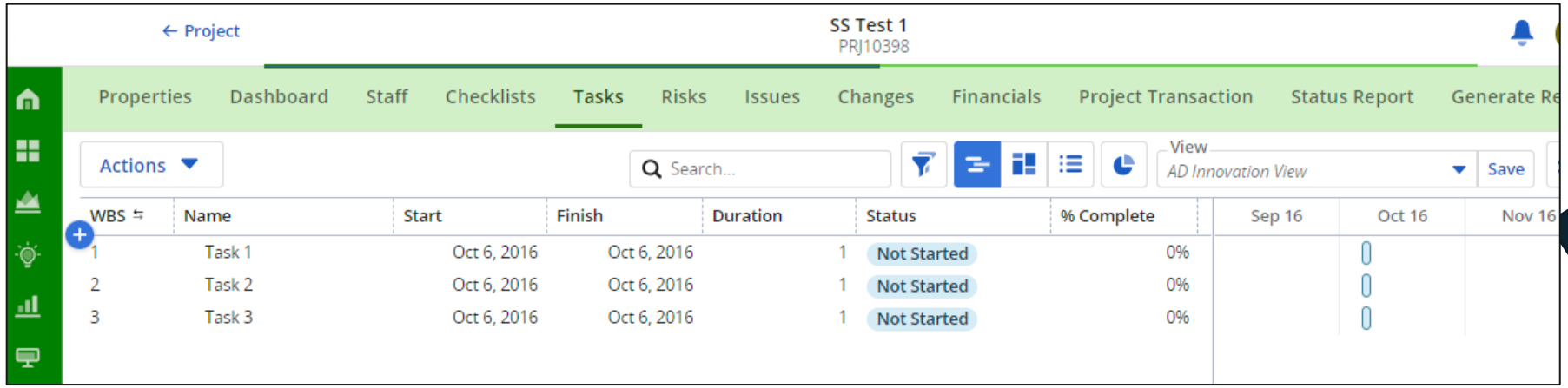
The project is created in Smartsheet in real time, importing all tasks that were created in Clarity.

SMARTSHEET INTEGRATION

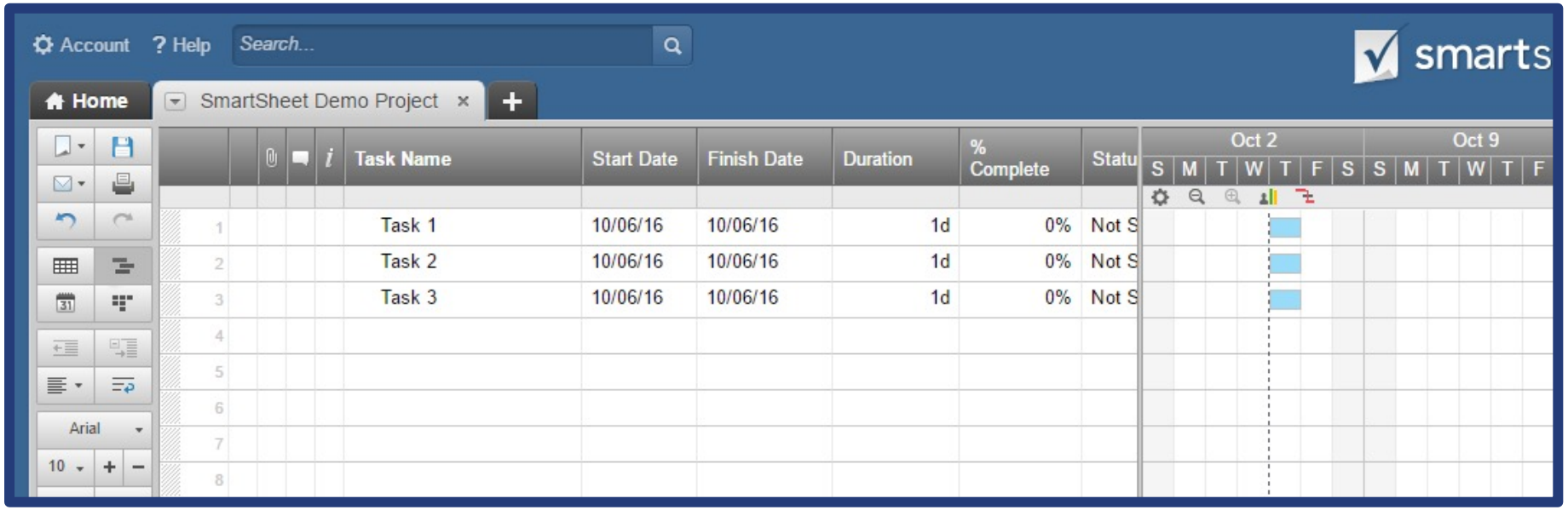
Smartsheet Link Type: Create New Sheet	Smartsheet Sheet Id: 6111927735740292	☑ Smartsheet Project
Smartsheet Link: https://app.smartsheet.com/sheets/cmqcJw6F9FfHhJr546VhcpW32XXCFxWfHFfFHgM1		Smartsheet Integration Status: Success
☐ Smartsheet Import Sheet	Smartsheet Integrated By: Thomas Calderini	Smartsheet Integration Date: 2022-11-21 07:01:14
Smartsheet Last Import Date: 2022-11-23 03:58:48	Smartsheet Last Import By: PPM Administrator	Smartsheet Last Import Status: Success

Direct link to Smartsheet

Tasks in Smartsheet



Update and seamlessly sync using native Smartsheet functionality



Link Risk and Issues Sheets on Projects

Risks, Issues and Change Requests can be synched as needed by easily enabling the functionality.

As sheets are created, the links will be stored in Clarity, along with sync details.

Risk

RISK - SMARTSHEET ID
7521500963071876

RISK - SMARTSHEET ESTABLISH LINK/SYNCH
☐

RISK- SMARTSHEET LINK
https://app.smartsheet.com/sheets/HW2WM578PWjrgX48CWWxHRCg7GqhmG6Vq3QJCP41

RISK-SMARTSHEET INTEGRATION LOGS
Synch Initiated By:Tony Stark;

Direct link to Risk Smartsheet

RISK-SMARTSHEET INTEGRATED BY
Taunya Moore

RISK- SMARTSHEET INETGRATION STATUS
Success

RISK-SMARTSHEET INTEGRATION/IMPORT DATE
2022-12-01 16:09:51

RISK - SMARTSHEET IMPORT STATUS
Success

Issue

ISSUE - SMARTSHEET ID
219731761358724

ISSUE - SMARTSHEET ESTABLISH LINK/SYNCH
☐

ISSUE- SMARTSHEET LINK
https://app.smartsheet.com/sheets/5V4q3RRP2rJwW47rFcrv5488Rv3Vj9r5QVRhH741

ISSUE-SMARTSHEET INTEGRATION LOGS
Synch Initiated By:Tony Stark;

Direct link to Issue Smartsheet

ISSUE-SMARTSHEET INTEGRATED BY
Tony Stark

ISSUE- SMARTSHEET INTEGRATION STATUS
Success

ISSUE-SMARTSHEET INTEGRATION/IMPORT DATE
2022-12-01 16:09:49

ISSUE - SMARTSHEET IMPORT STATUS
Success

Risk in Smartsheet

File | Alerts & Actions | Forms

MK Risk Sample

Grid View | Filter | Arial | 10

	ID#	Description	Risk/Issue Type	Status	Owner	Target Resolution Date	Probability	Impact	Risk Response	Show In Report	Mitigation Steps/Resolution	Comments
1	Risk234	Risk234	Human Interface	Open		04/19/19	Low	Low	Accept		Migration Steps	Comments
2												

← Project

SS Test 1
PRJ10398

Properties | Dashboard | Staff | Checklists | Tasks | Risks | Issues | Changes | Financials | Project Transaction | Status Report | Generate Report | Note | NPS

Search... | View: (Copy) Avery IT - Default

Select All | Deselect All

Group By

Name *	Status *	Created By	Probability	Impact	Priority *	Calculate...	Target Resolution Date
Risk 234	Open	Hensel, Ross	Low	Low	Low	Low	Apr 19, 2019

Issues in Smartsheet

File | Alerts & Actions | Forms

MK Issue Sample

Grid View | Filter | Arial | 10

	ID#	Description	Risk/Issue Type	Status	Owner	Target Resolution Date	Issue Priority	Show In Report	Issue/Action Resolution Plan	Comments	Original Due Date	Escalation Level
1	Issue234	Issue234	Human Interface	Open	TA Tom Andersor	04/19/19	Low		Issue/Action Resolution	Comments	04/09/19	PMO
2												

← Project

SS Test 1
PRJ10398

Properties | Dashboard | Staff | Checklists | Tasks | Risks | Issues | Changes | Financials | Project Transaction | Statu

Search...

Select All | Deselect All

Group By

Name *	Status *	Priority *	Target Resolution Date	Resolved Date
Issue 234	Open	Low	Apr 19, 2019	

Questions?

regoUniversity

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

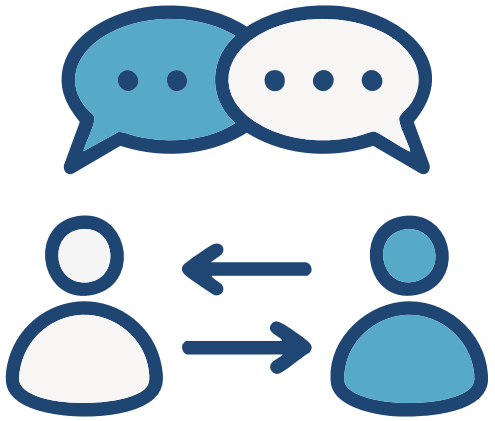
- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- 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

Website
www.regouniversity.com

Continue to Get Resources and Stay Connected

1. Use RegoXchange.com for instructions and how-tos.
2. Talk with your account managers and your Rego consultants.
3. Connect with each other and Clarity experts at RegoGroups.com.
4. Sign up for webinars and join in-person Rego groups near you through at RegoConsulting.com.
5. Join us for the next Rego University!