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Integration Approaches and Recommended Strategies

Your Guides:
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Agenda

- Defining “Integration”
- Understanding the Business Case
- Framing the Integration
- Exploring Integration Tools
 - Excel-Based Integrations
 - Data Processor / Data Extractor
 - ConnectAll

Introductions

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



Defining “Integration”

What Is an Integration?

Traditionally, it's a systematic merging of data between two applications.

As noted in our 2024 Trends, integrations in the PPM space have more recently focused on true **interoperability**, in which they facilitate the automation of business processes.

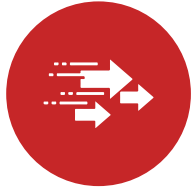
Note: For the purposes of this discussion, we're excluding reporting-based "integration" by way of merged data sets and an aggregating BI layer. However, it's a viable consideration when the requirements focus on data consumption and less on interoperability.



Why Integrate?



Increasing Integration Demands



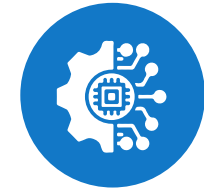
AI-Driven Acceleration

- AI adoption and the demand for data are accelerating the need for integration and automation.
- AI is only as good as its data. Integrations are promoting data quality by eliminating human touch points and streamlining workflows.



Organizational Transformations

- Shifts in management models and remote work increase reliance on interconnected data and workflows.
- Real-time application syncing and workflow automation are essential for staggered work schedules.

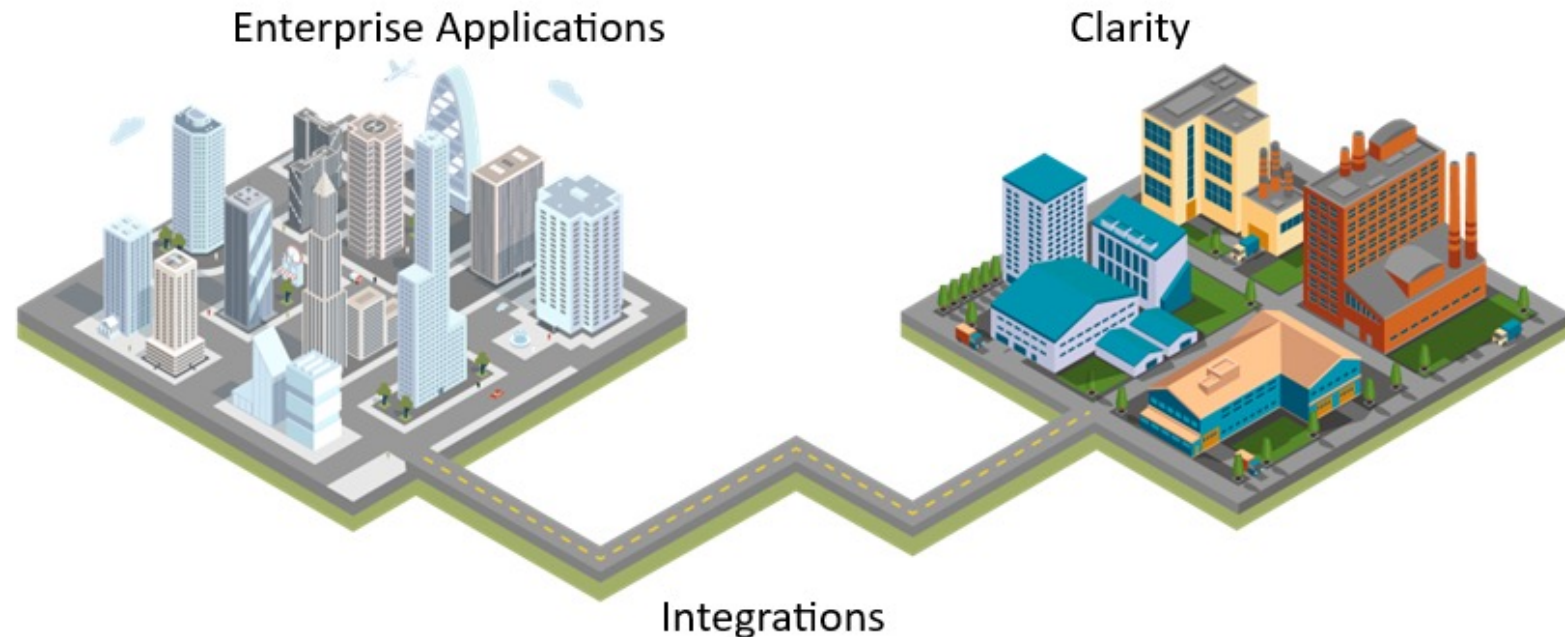


Technological Evolutions

- Diverse tool ecosystems are replacing the single solution play.
- Rise of integration platforms allows for central hubs, simplifying connections and enabling automated processes.

Why Integrate?

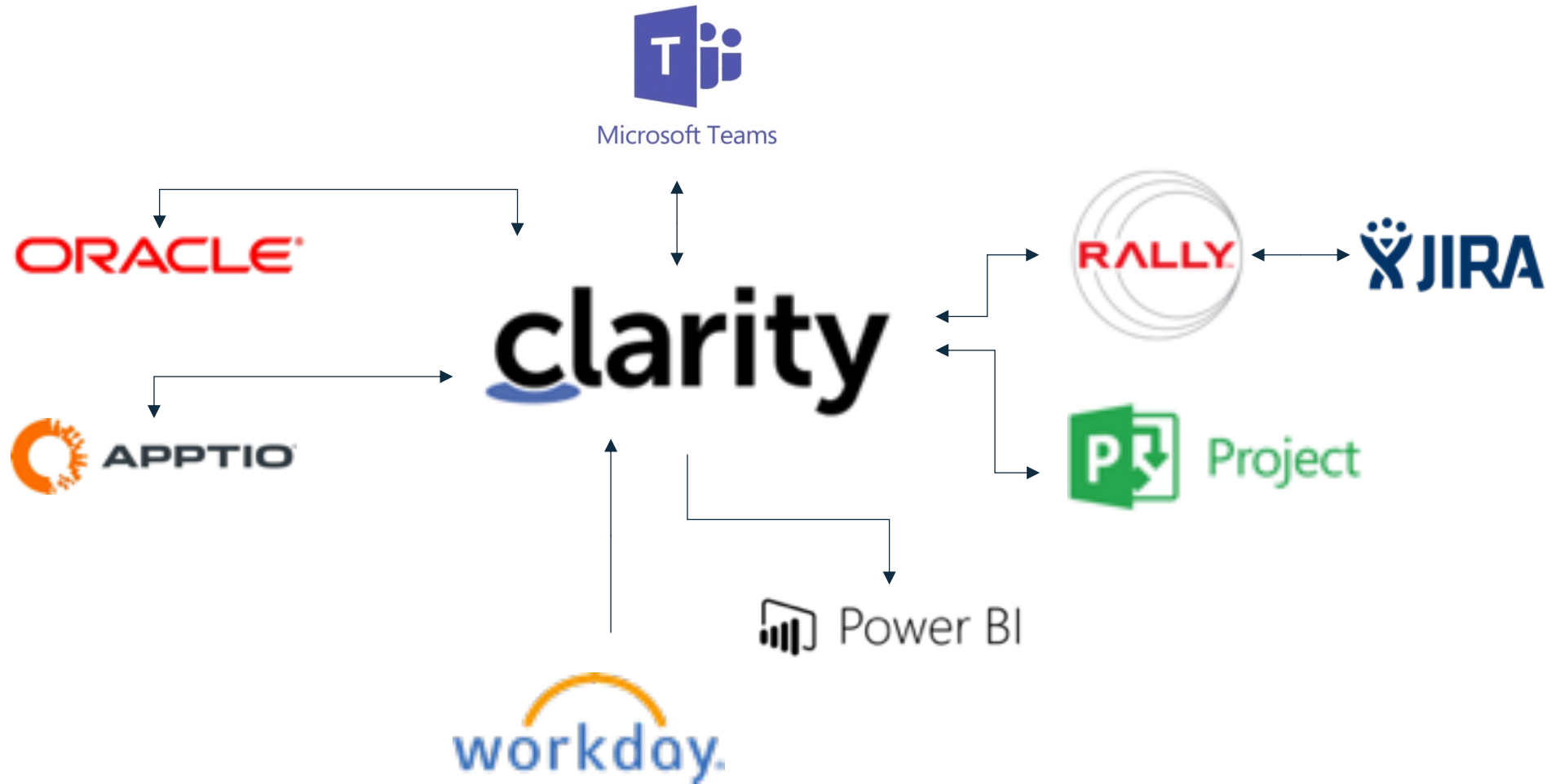
- Increasing number of applications with specialized functionality.
- Organizations are allowing teams to use their own applications.
- Facilitating business process.
- Eliminating administrative activities.
- Eliminate double entry.
- Data consistency.
- Proving a one-stop-shop.
- Reduction of license costs.
- Data is a valuable asset.



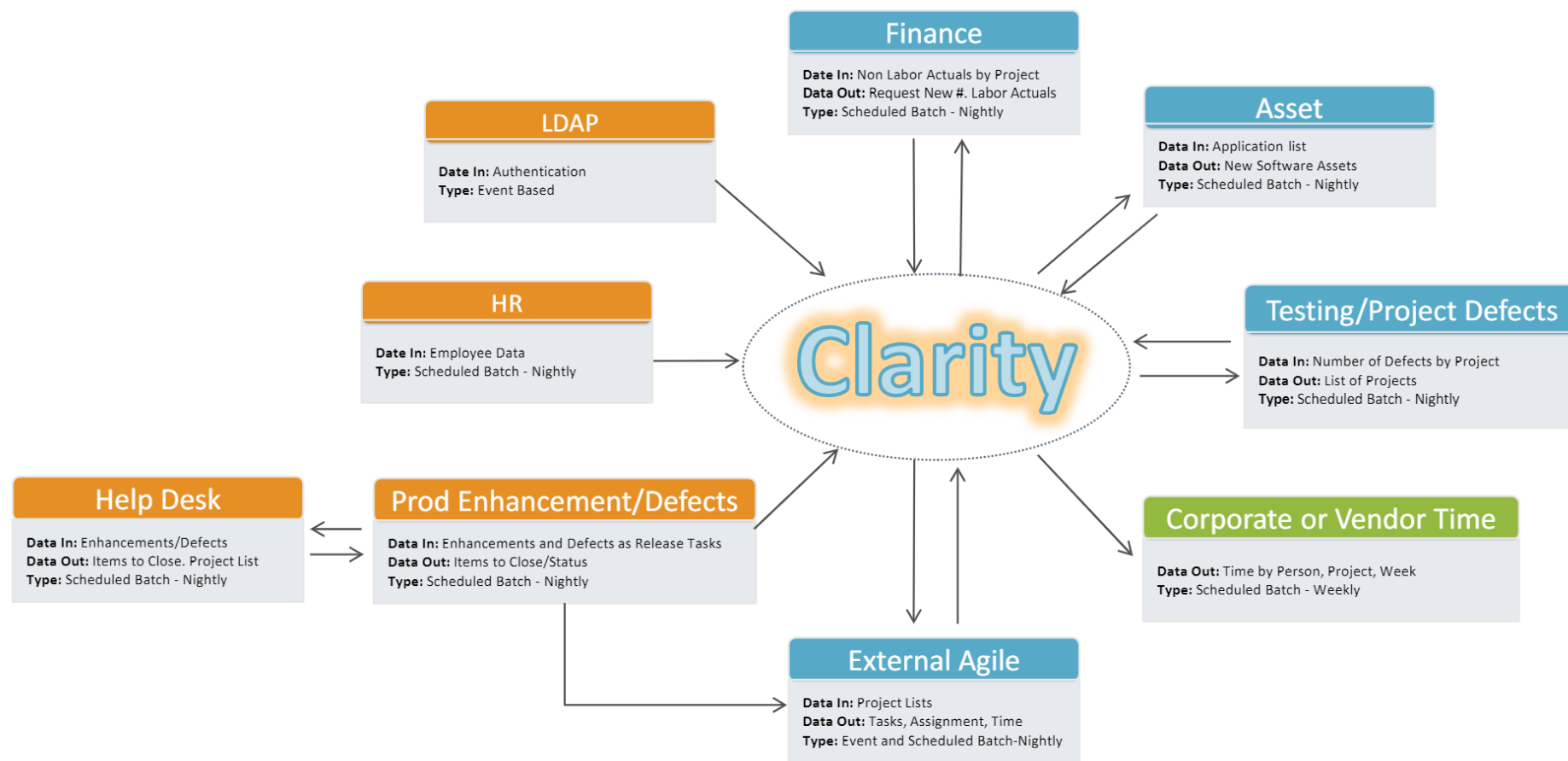
Most Common Integrations

- 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.
- AI
 - Who: ChatGPT, Gemini, Copilot.
 - How: API.
 - What: Project Descriptions, Staffing Decisions.
- HR/ Resources Systems
 - Who: ERP Systems, Active Directory, Workday.
 - How: Flat file.
 - What: LDAP/SSO, Users and Resource Data, Organizational Structure.
- ITSM
 - Who: ServiceNow, Remedy.
 - How: API.
 - What: Idea and Pipeline Management, Ticket Escalation, Enhancement Requests.

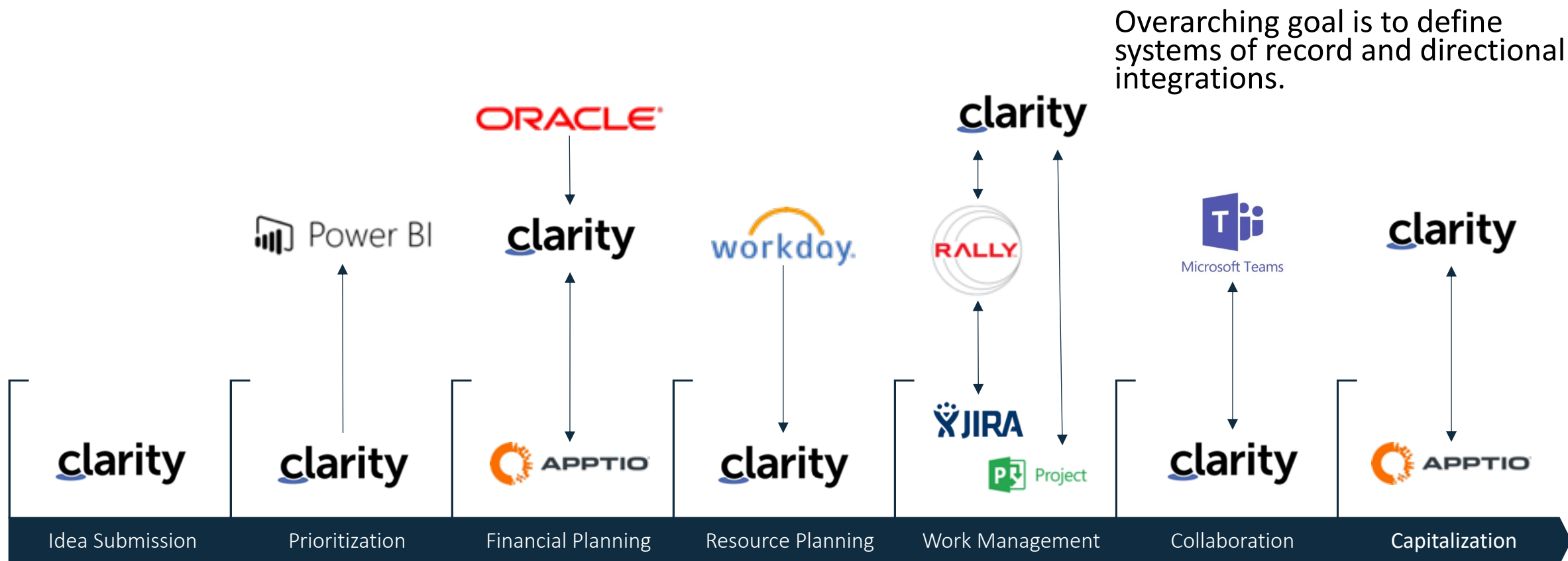
Reference Architecture



The Wheel and Spoke

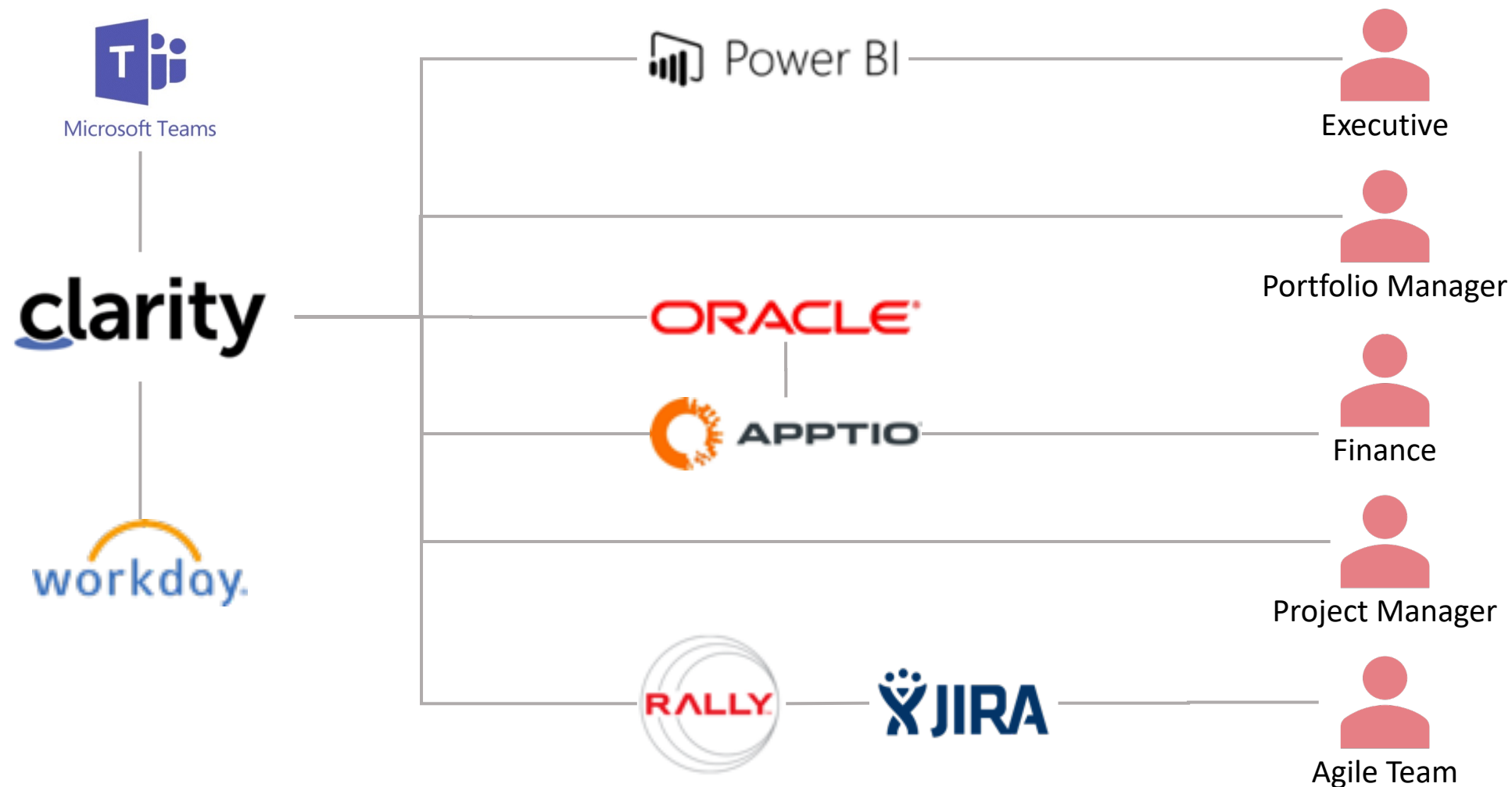


Value Stream-based Architecture



Persona-based Architecture

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

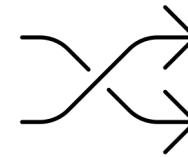
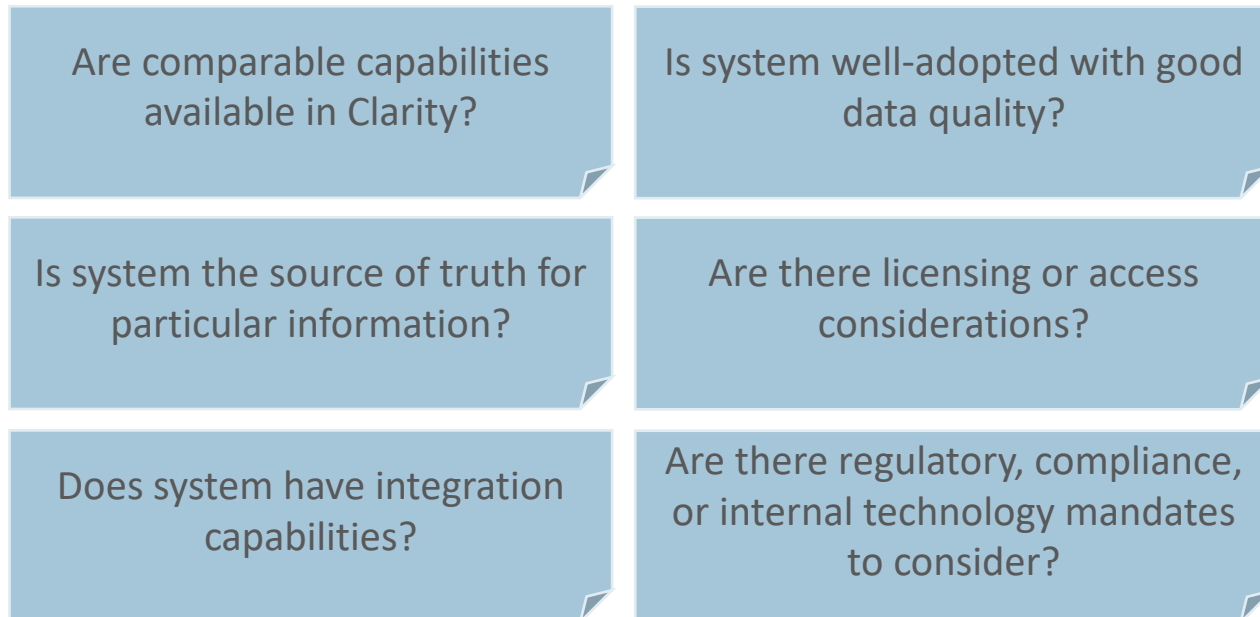


Framing the Integration

Integrate or Replace

A balanced, rationalized PPM ecosystem requires a strategic evaluation of each system and potential integration opportunity.

Understand the considerations...



...and the impacts.

Integrate		Replace
☒	Change Management	
☒	Data Migration	
	Long-Term Maintenance	☒
☐	Initial Investment	☐

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.
 - Understand the accuracy of the source data.
 - Identify the key integration points and invest in doing it correctly.

Objective: Get More Out of your PPM Investment!

Framing the Integration

- What data is being exchanged?
- Directionality (inbound, outbound, bi-directional)?
- What is the source of the data?
- Which application is considered the source of truth?
- Data volume?
- Timing (real-time, batch)?

- Is your Clarity system On Premise or SaaS?
- Is the system you are integrating to On Premise or SaaS?
- Understand the technical limitations/restrictions.
 - Protocol support (https, SFTP, etc.)
 - Firewall and security restrictions.
- Scenarios:
 - Clarity SaaS to SaaS software.
 - Common: Most SaaS products have a rich API suite for integrating.
 - Clarity On Premise to On Premise software.
 - Common: If both products are within your company borders there are more flexible options for integrating.
 - Clarity SaaS to On Premise software.
 - Uncommon: These integrations are more complex. Most will require security exceptions.

High-Level Design

- Consume the data into a staging object.
- Validate data.
 - Apply business rules.
 - Apply transformations.
 - Apply validation rules
- Process data.
 - Process only new or changed records.
 - Warnings vs critical errors.
- Error check and handling.
- Notifications and monitoring.

Error Handling and 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. Get a win!
 - 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 Methods

- Flat file.
 - Available for On-Premise and On-Demand.
 - Batch interface.
 - Large data volume.
- Web Services (REST or SOAP).
 - Available for On-Premise and On-Demand.
 - Great for real time interfaces.
 - Small to medium data volume.

Integration Tools

Excel: Enemy or Friend?

- People like to use Excel.
 - Familiar and well-understood.
 - Totally in their control.
- Replacing Excel completely with CA PPM leads to disgruntled users.
 - Find a middle ground.
 - Proclamations will not stop use anyway.
- Excel can support our overarching goals.
 - Data accuracy.
 - End user adoption.
- Understand the world of Excel interface possibilities.
 - Data Processor.
 - EDM (Excel Data Manager).
 - Out-of-the-Box CSV Import / Export.

Data Processor Overview

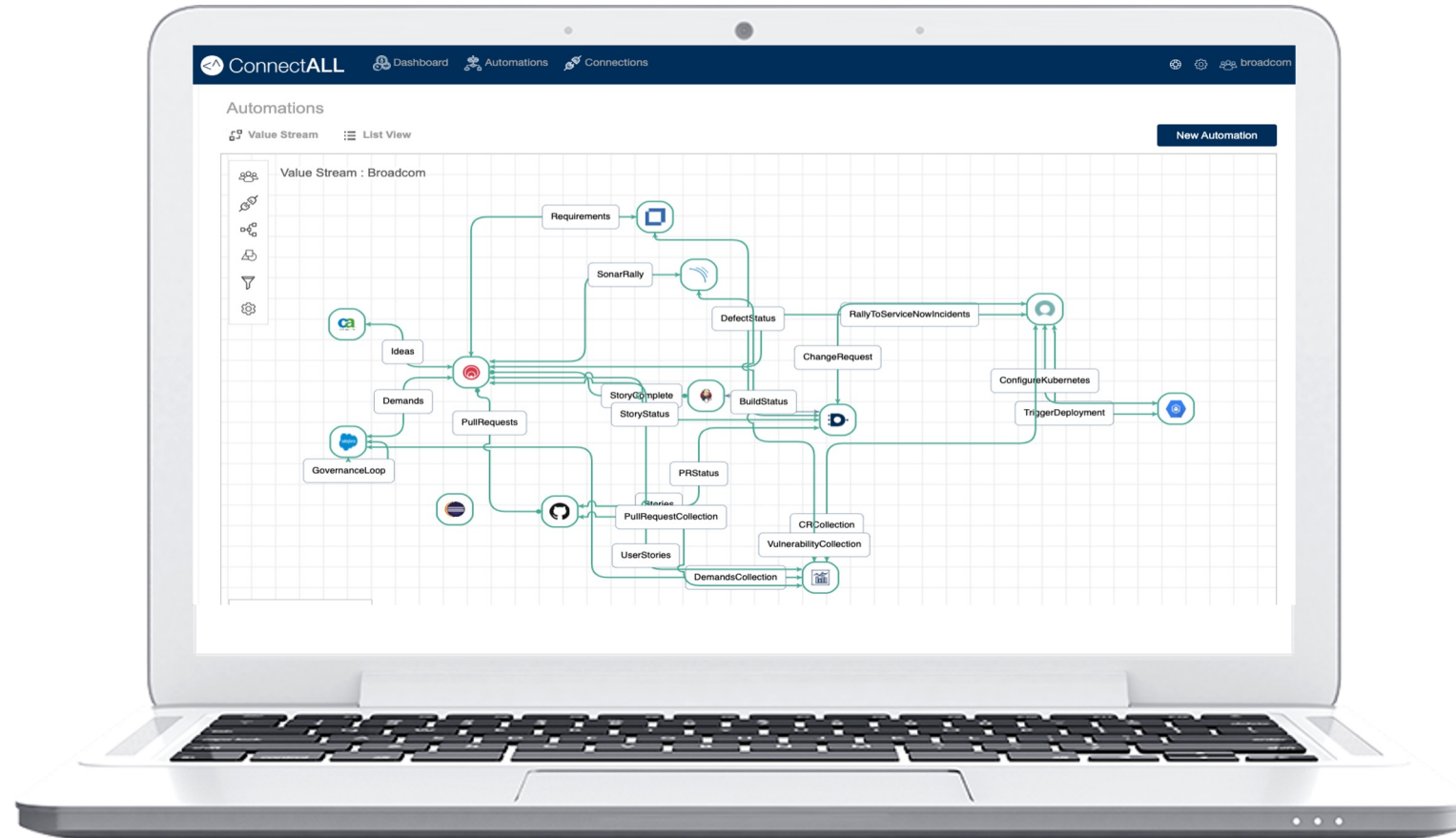
- Purpose:
 - Allow users to configure rather than code inbound integrations.
- Used For:
 - Inbound Integrations.
- Advantages:
 - Allows common integration tasks to be configured.
 - Implements best practices and standard approaches for integration tasks.
 - Avoids Clarity GEL Script limitations / governors.
 - Avoid bloating instance rights table.
 - Uses a Connection Manager to securely store authentication credentials.

Data Extractor Overview

- Purpose:
 - Efficiently pull data from Clarity into flat files.
- Used For:
 - Outbound Integrations.
 - Feed reporting tools and data warehouses.
- Advantages:
 - Highly configurable (only code required is a query).
 - Highly performant, efficient, and scalable.
 - Dynamically produce files based on the provided query.
 - Avoids Clarity GEL Script limitations / governors.
 - Standardized asset to avoid redundant GEL scripts that produce data extracts.

ConnectAll

26



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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.



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- Access your account at pmi.org
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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**
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- Training classes = **Technical**
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