



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

Your Guides:
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Agenda

- SharePoint and Microsoft Teams
- Excel Data Manager (EDM)

Enhance Collaboration with SharePoint and Microsoft Teams

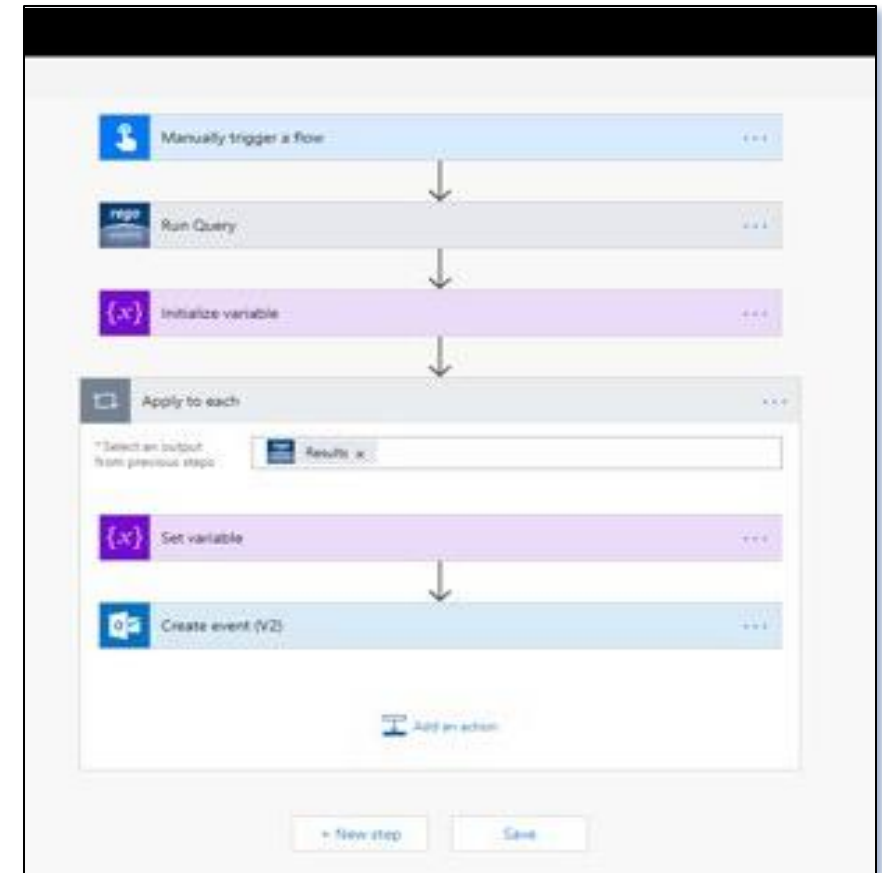
Rego's Approach

Microsoft-Certified Connector for Microsoft's Power Automate

- Power Automate is a Microsoft 365 service to build robust automations and processes through a low-code UI
- Interacts natively with the 365 ecosystem provides features to easily manage, deploy, and secure automations
- Runs within your organization's tenant and provides tools to easily manage and troubleshoot automations
- Includes powerful capabilities like notifications, approvals, and hundreds of connectors

Rego's Connector equips Power Automate to:

- ✓ Pull data from Clarity
- ✓ Save data back to Clarity
- ✓ Allow Clarity processes to trigger automations and provide real-time integrations
- ✓ Use XML Open Gateway (XOG) and REST APIs to support objects and custom investment types (CITs)



Rego's Approach



Prebuilt bundles based on common use cases empower customers to:

- Collaboration Bundle: seamlessly create Microsoft 365 location for project-related documents
- RIDAC: Synchronize risks, issues, and change requests with Clarity
- Outlook out-of-office (OOO) events: Automatically update Clarity resource calendars

Our connector also supports customer specific use cases:

- Intake via Microsoft Forms or SharePoint Lists
- Microsoft Dynamics leads to Clarity projects
- Integration with Microsoft Power Apps for interactive applications

Collaboration: The Team Space Is Created

- Easily create Microsoft 365 locations for file storage and collaboration when an investment meets a specific criterion, such as creation or approval. We can also create locations manually through actions.
- The integration will seamlessly create: SharePoint sites, document libraries, folders, Microsoft Teams, or Teams channels.

Projects ▸

Automated Security Enhancements PR1016 At Risk

Properties Conversations Staff Tasks Links Financials Risks Issues Changes Status Task List Document Manager To Dos Lessons Learned

▼ Collapse all Actions ▼

▼ Project Summary

Project Name: Automated Security Enhancements Project ID *: PR1016 Scheduler Format: Microsoft Project Bidirectional ▼

Start *: May 1, 2021 Finish *: Feb 5, 2025 % Complete: 0.00%

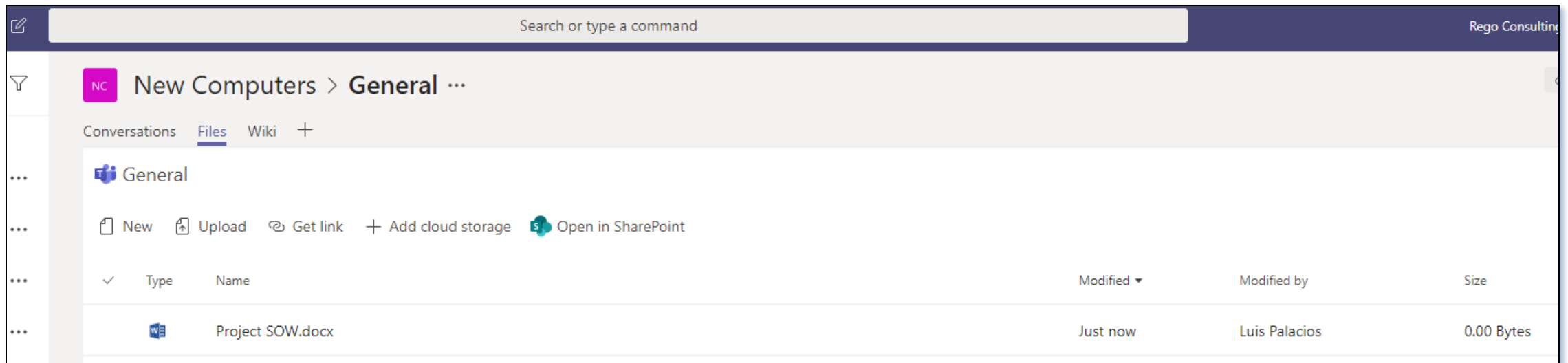
Department OBS: Corporate:IT/Shared Services ▼ Project Type: Infrastructure Deployment ▼

M Gate: ▼

Objective: Surveillance and monitoring improvements to enhance fraud and security measures on the online system.

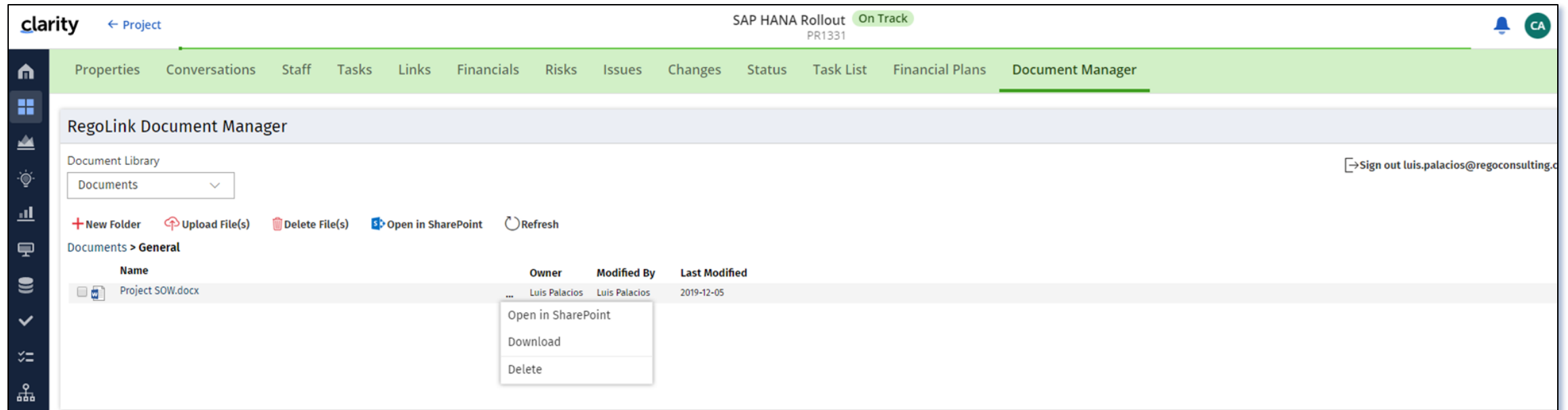
Collaboration: The Team Space Is Created

- The container will follow a predefined naming convention that reflects your organization's needs, such as the project name, department, or other fields
- Automatically pre-populate with a default folder and file structure to streamline business processes and data governance
- Users can access native Microsoft 365 functionality once the container is created
- The container continuously synchronizes permissions with Clarity, using project managers, staff, and custom fields to map additional users in Microsoft 365



Collaboration: Document Manager – Modern UX

- Seamlessly use Rego's Document Manager to browse files within Clarity without switching applications
- Document Manager works based on SharePoint, so files won't be duplicated
- It applies Microsoft 365 and SharePoint permissions so users can access only authorized documents



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 STORYBOA

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	High	High	High	8/29/21			Flexibility	Administrator, Clarity	
☐	Risk from MS Teams	1630335205	Open	Lyons, Stacy	High	High	High	9/24/21			Implementation	Flow, Clarity	
☐	Risk 2	RI0231	Open	Lyons, Stacy	High	High	High	12/31/21			Implementation	Lyons, Stacy	

Displaying 1 - 3 of 3

Create your risks and issues in Clarity or in Microsoft Teams and synchronize them with the other system.

Microsoft Teams

Search

Teams

General

Clarity Risks

Clarity Issues

Project Notes

2 more

+ New

Edit in grid view

All Items

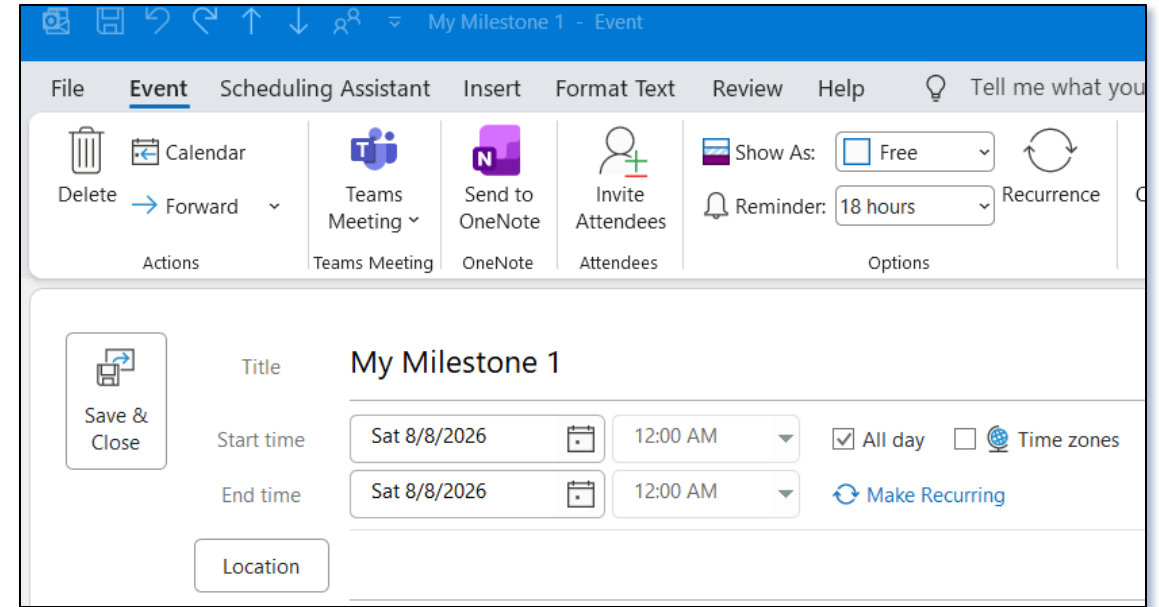
Title	Risk ID	Category	Status	Owner	Target Resolution D...
Risk 2	RI0231	Implementation	Open	Lyons, Stacy J	12/31/2021
Risk 1	RI0230	Flexibility	Open	Lyons, Stacy J	8/29/2021
Risk from MS Teams	1630335205	Implementation	Open	Lyons, Stacy J	9/24/2021

The connector can also sync other objects, including custom objects, with SharePoint Lists.

Integrate Outlook Calendars with Clarity

Easily sync:

- ✓ Key project dates with shared calendars for visibility among external users
- ✓ Out-of-office events with resource calendars and availability



Properties Tasks Baselines Financials Staff Assignments Risks Issues Changes Checklists Status Action Items Workflow Conversations Audit Agreements To Dos Experience Data Dashboard									
Actions New Task									
Q Search...									
WBS	Name *	Start *	Finish *	Status	% Complete	ETC	Duration	Jul 26	Aug 26
1	My Milestone 1	Aug 8, 2026	Aug 8, 2026	Not Started	0%	0	0		
2	My Milestone 2	Aug 29, 2026	Aug 29, 2026	Not Started	0%	0	0		

Out of Office - Event

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

Delete Calendar Forward Actions

Teams Meeting Teams Meeting

Send to OneNote OneNote

Invite Attendees Attendees

Show As: Out of... Options

Reminder: 18 hours Recurrence

Categorize Tags

Private High Importance Low Importance

Dictate Voice

Sensitivity Sensitivity

All Apps

This appointment conflicts with another one on your calendar.

Are you going to be out of office soon? Plan for your time away. [Plan](#) | [Dismiss](#)

Save & Close

Title Out of Office

Start time Thu 8/13/2026 12:00 AM ☒ All day ☐ Time zones

End time Fri 8/14/2026 12:00 AM [Make Recurring](#)

Location

Properties Investments Skills **Calendar** Classic Calendar

August 2026 152.00 hours available this month

Sunday	Monday	Tuesday
26 Non-Working Day	27 Shifts 8:00am - 12:00pm 1:00pm - 5:00pm	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm
2 Non-Working Day	3 Shifts 8:00am - 12:00pm 1:00pm - 5:00pm	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm
9 Non-Working Day	10 Shifts 8:00am - 12:00pm 1:00pm - 5:00pm	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm



Calendar Classic Calendar

August 2026 152.00 hours available this month Show Weekend Display Data All ▾

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Non-Working Day 26	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 27	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 28	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 29	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 30	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 31	Non-Working Day 1
Non-Working Day 2	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 3	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 4	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 5	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 6	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 7	Non-Working Day 8
Non-Working Day 9	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 10	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 11	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 12	Non-Working Day 13	Non-Working Day 14	Non-Working Day 15
Non-Working Day 16	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 17	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 18	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 19	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 20	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 21	Non-Working Day 22
Non-Working Day 23	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 24	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 25	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 26	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 27	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 28	Non-Working Day 29
Non-Working Day 30	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 31	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 1	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 2	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 3	Shifts 8:00am - 12:00pm 1:00pm - 5:00pm 4	Non-Working Day 5

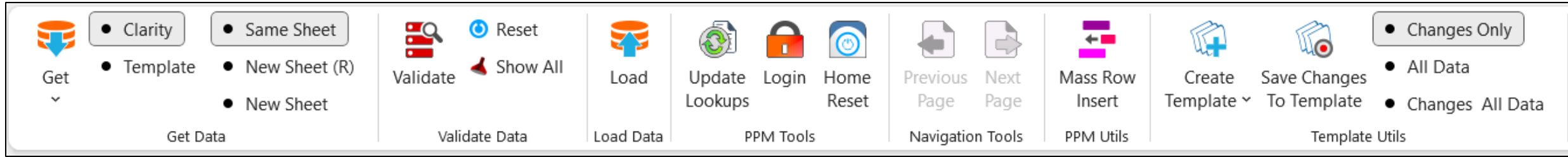
And Much More...

- Export Status Report PDFs automatically to share deliverables with stakeholders
- Capture Ideas via Microsoft Forms or SharePoint Lists
- Plus, hundreds of connectors available in Power Automate



Excel Data Manager

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
- Bidirectional utility that allows users to:
 - Extract – 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 using Clarity rules for required, lookups based, max length, numerical ranges, and 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
 - EDM communicates with Clarity through the Clarity API and Rego’s Data Processor, making it compatible with all hosting options

Get Data

Get Data interface showing a sidebar with categories (Allocations, BenefitPlans, Companies, CostPlans, Ideas, Incidents, Issues, Locations, Others, Products, Programs, Projects) and a 'Filters' dialog box. The dialog includes input fields for 'Enter Project Codes:', 'Enter Project Name:', and 'Select Manager:', along with a 'Select Status:' dropdown menu listing various statuses (Approved, Cancelled, Converted, Incomplete, On Hold, Rejected, Resumed, Submitted for Approval, Unapproved). Buttons for 'Clear Filters' and 'Get Data With Filters' are visible at the bottom of the dialog.

- Retrieve data by relying on Clarity's API and NSQL queries
- For a tailored experience, users can filter data prior to downloading
- Applies Clarity access rights so users see only the data they are authorized to view
- Easily import data from other sources by creating and populating Excel Sheet templates

Template Utils section showing options for 'Create Template' and 'Save Changes To Template'. A dropdown menu for 'Changes Only' is visible, with options for 'All Data' and 'Changes All Data'.

Edit Data

- Modify data via Excel functionality like dragging values down and/or across, copy/paste, search/replace, VLOOKUP, and formulas
- EDM changes the background color of modified cells as a visual cue
- Only modified and required fields are sent to Clarity for update
- An asterisk (*) precedes required field labels
- Lookup-based attributes use Excel data validation lists (in cell drop downs)
- Supports static, dynamic, dependent, and 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	Unapproved	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

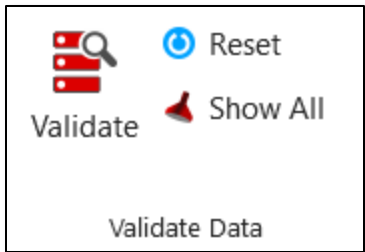
Supports Time-Scaled Values

- Includes samples for cost plans, benefit plans, allocations, and task estimate to complete (ETC)
- Extracts a fixed number of periods based on interface configuration, for a tailored experience
- Displays 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



- EDM changes the background color of cells that fail validation and adds a comment describing the error
- Provides a configurable validation message for each attribute
- Validates required fields, data types, Excel functions such as length, Clarity lookups, and custom macros that check 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

Load Data

- | A | | | | Progress Indicator | | 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 | | | 100% Completed | | 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
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5	A CMS Test Project	PR001338	Matt Young	Unapproved	TRUE	FALSE		2022-04-14	2022-04-14	Not Started

Questions?



Survey



Please take a few moments to fill out the class survey.

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within a certification track.



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Clarity Administrator**



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Clarity Lead**

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Deepen your skills in focused topic areas.
Complete 4 eligible learning units within a selected
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**Artificial
Intelligence (AI)**



**Reporting &
Analytics**



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More info: <https://regouniversity.com/certificates>

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- Access your account at pmi.org
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- 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!
Remember to fill out the class survey.



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