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Smart Integrations for a Single Source of Truth

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 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

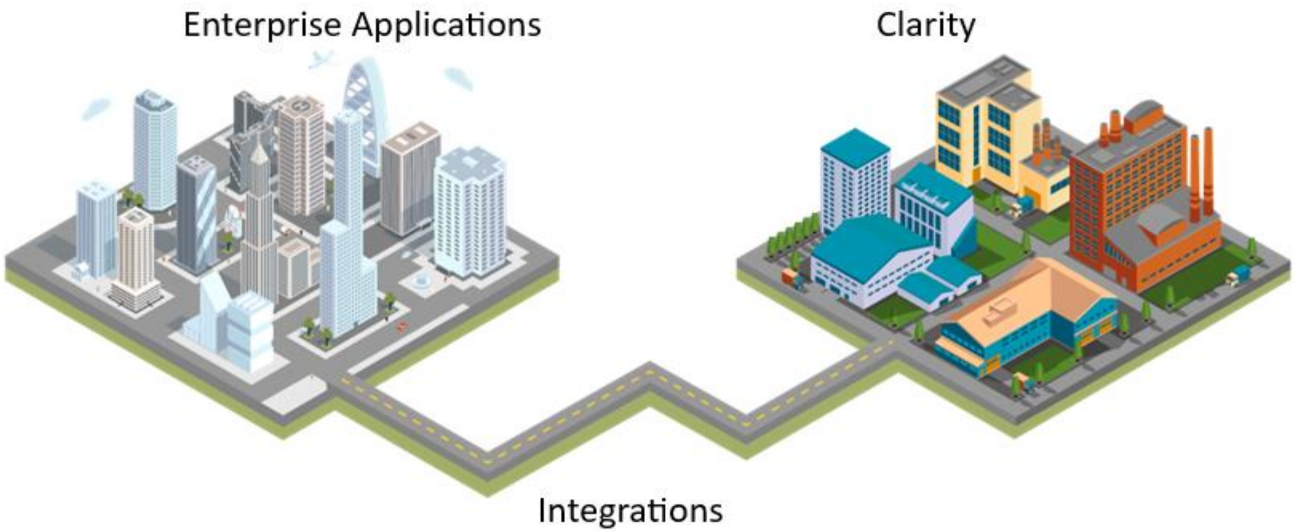
- Shifts in management models and remote work increase reliance on interconnected data and workflows.
- Real-time application syncing and workflow automation are essential for staggered work schedules.

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.
- Unlock the value of AI.
- Eliminating admin activities.
- Eliminate double entry.
- Data consistency.
- Proving a one-stop-shop.
- Reduction of license costs.
- Data is a valuable asset.

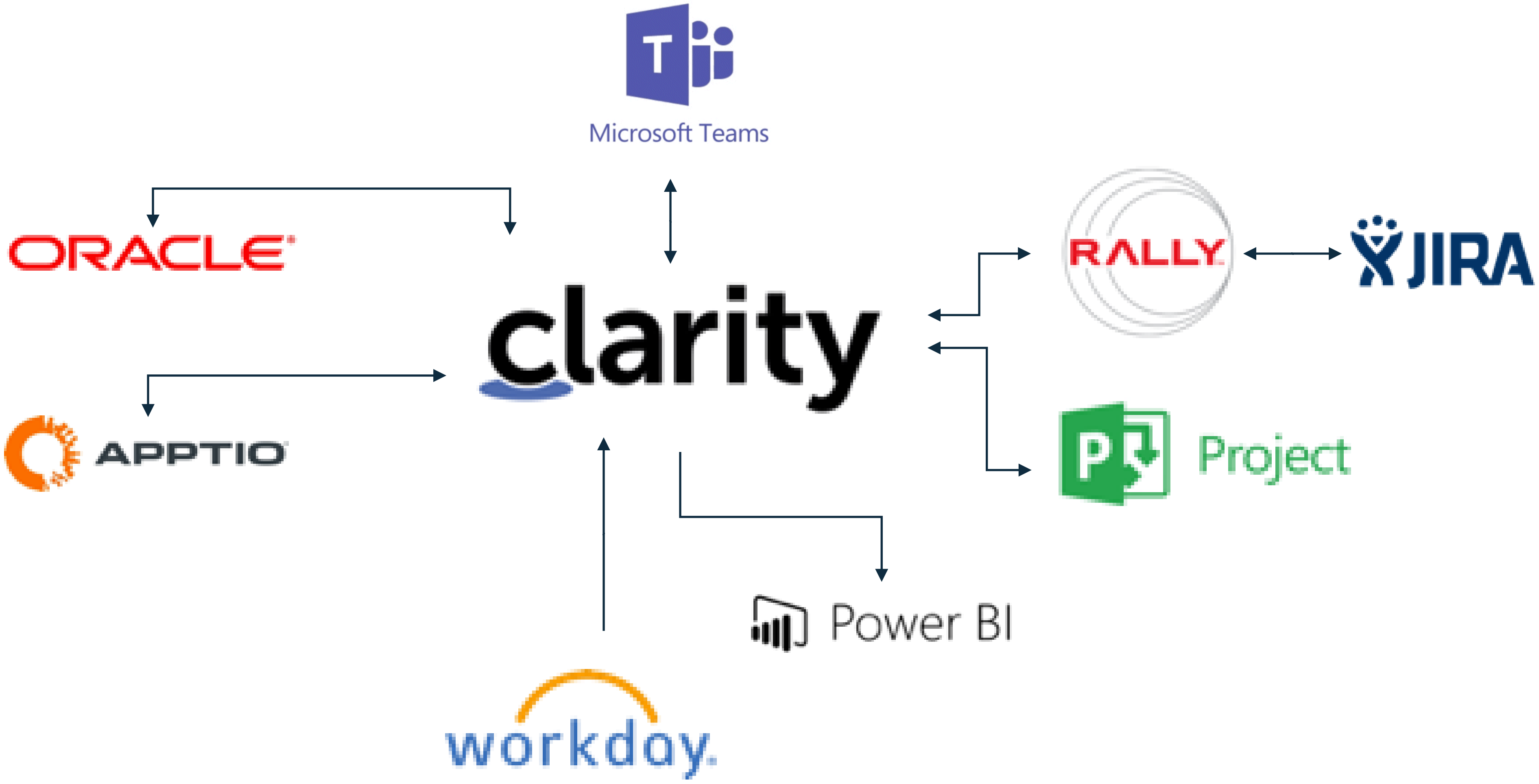


Most Common Integrations

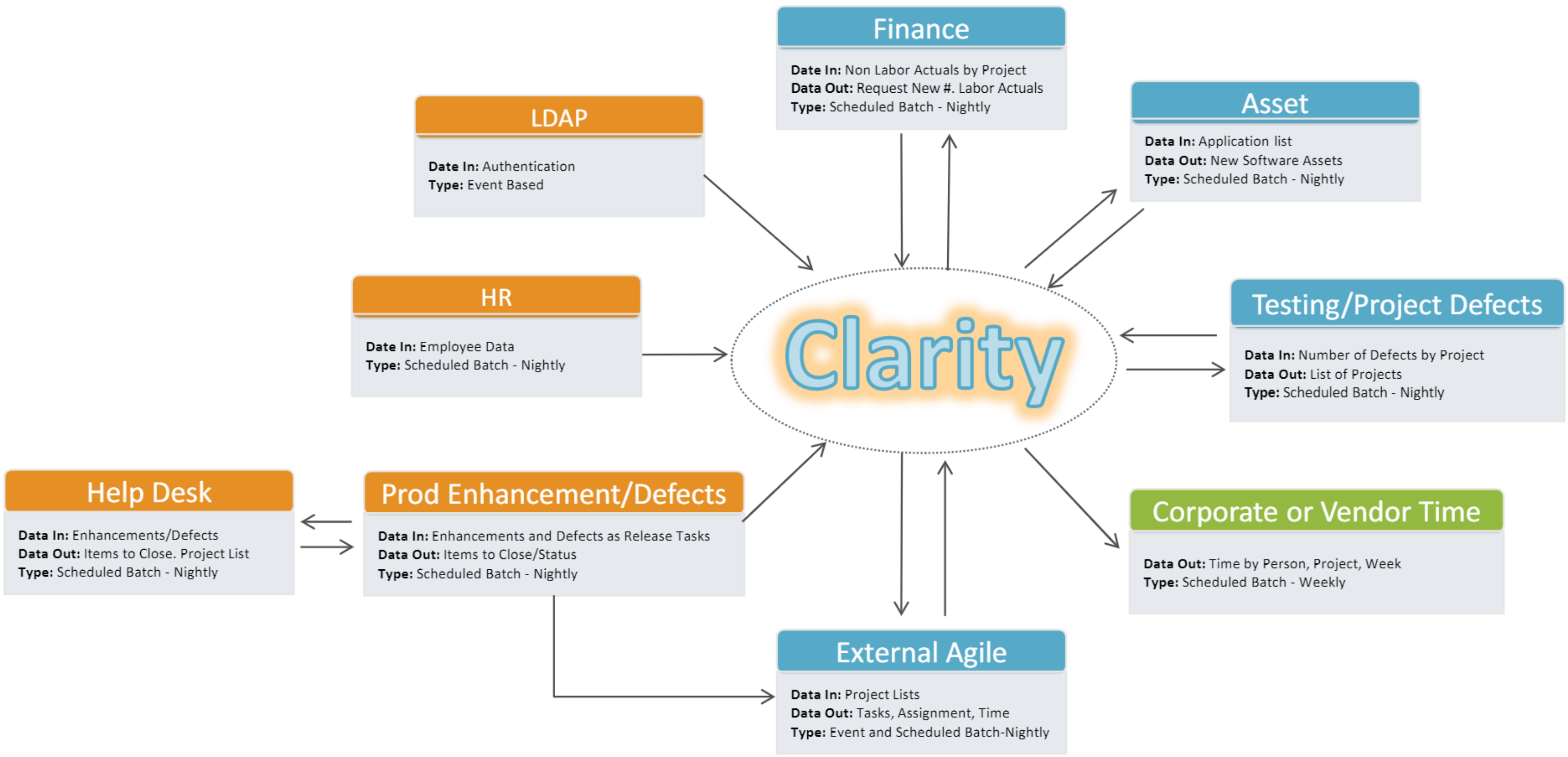
- Agile Tools
  - Who: Rally, Jira, ADO
  - How: API
  - What: Project Lifecycle, Time Entry, Capitalization Data
- ERP/Financial Systems
  - Who: SAP, Oracle, Microsoft Dynamics
  - How: Flat file
  - What: Direct Expenses, Time Entry, Cost Centers Forecasts, Budgets.
- AI
  - Who: ChatGPT, Gemini, Copilot
  - How: API
  - What: Data Analysis and Recommendations
- HR/Resources Systems
  - Who: Workday, Active Directory
  - How: Flat file
  - What: LDAP/SSO, Resource and Security Data, Organizational Structure
- ITSM
  - Who: ServiceNow, Jira, BMC
  - How: API
  - What: Pipeline Management, Ticket Escalation, Enhancement Requests

*With the enablement of MCP servers, we see this accelerating exponentially. Focus shifts from analysis to agentic action

Reference Architecture

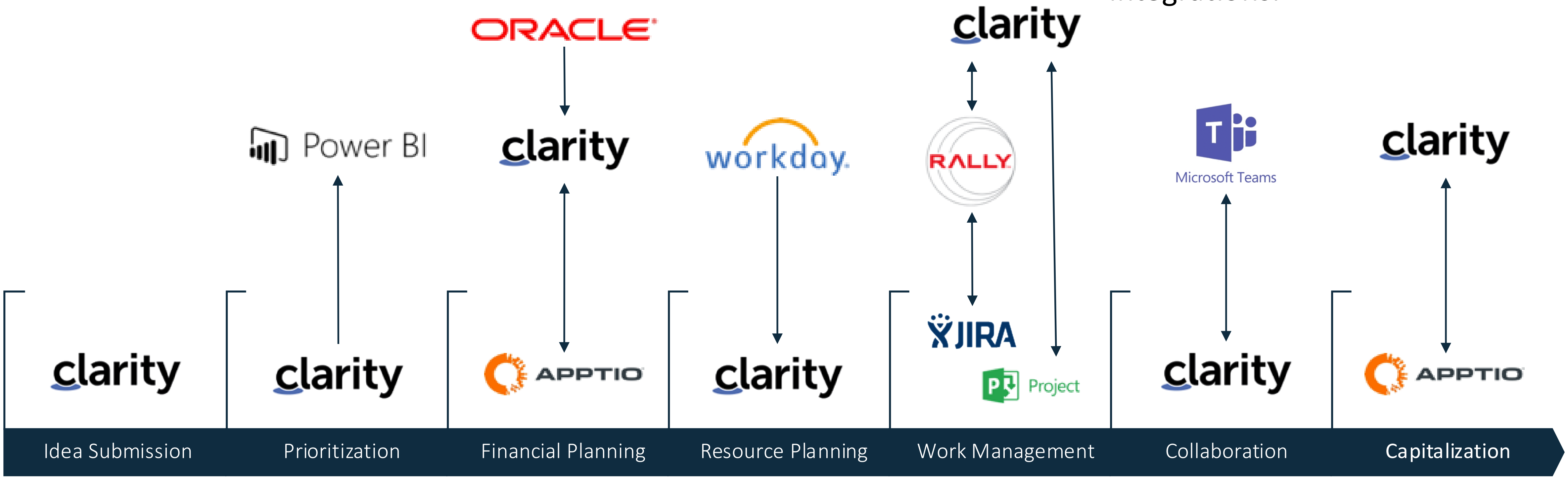


The Wheel and Spoke



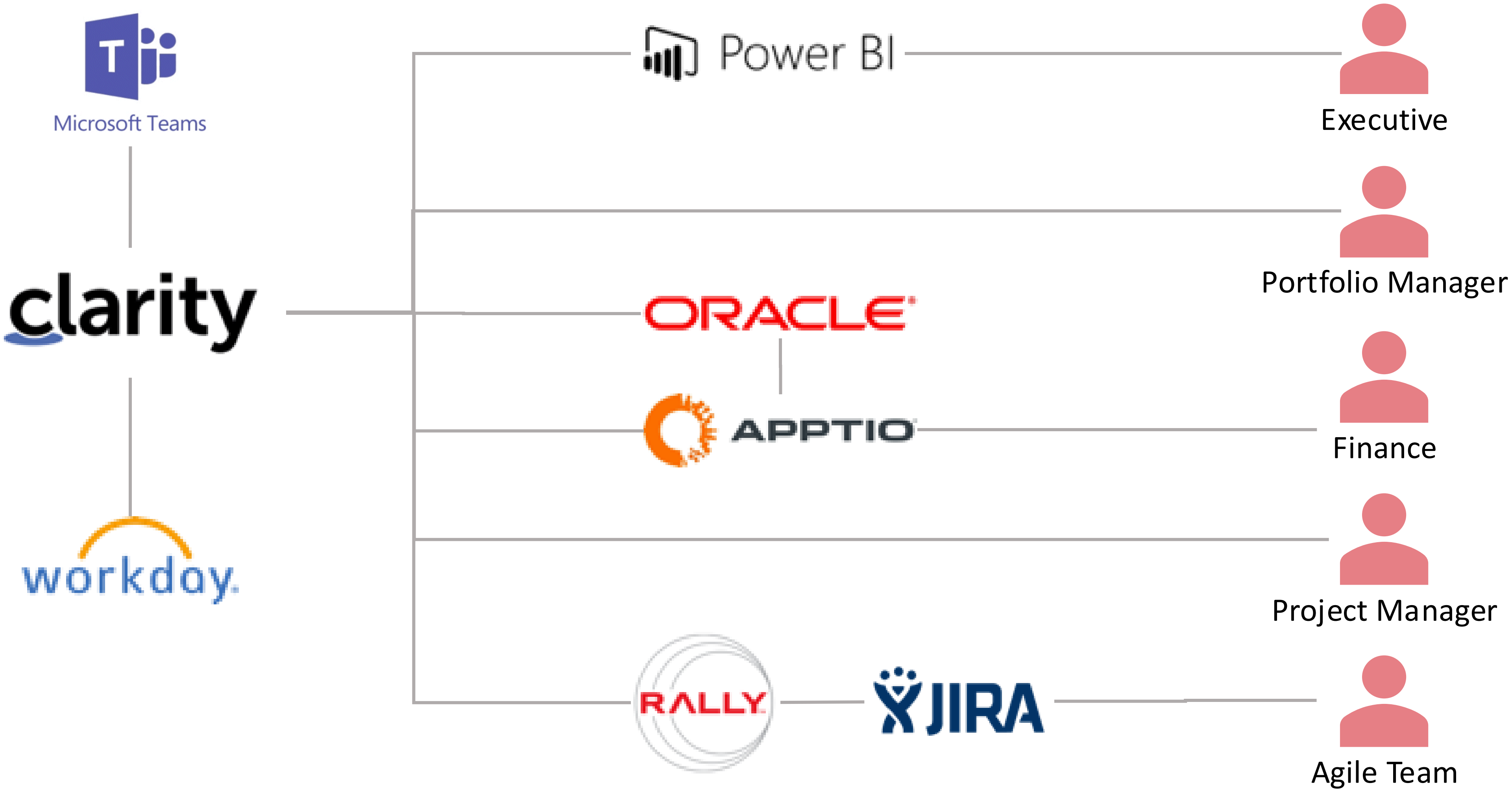
Value Stream-based Architecture

Overarching goal is to define systems of record and directional integrations.



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…

- Are comparable capabilities available in Clarity?
- Is system well-adopted with good data quality?
- Is system the source of truth for particular information?
- Are there licensing or access considerations?
- Does system have integration capabilities?
- Are there regulatory, compliance, or internal technology mandates to consider?

…and the impacts.

Integrate	Impact	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)?

Location, Location, Location

- 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 handing 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

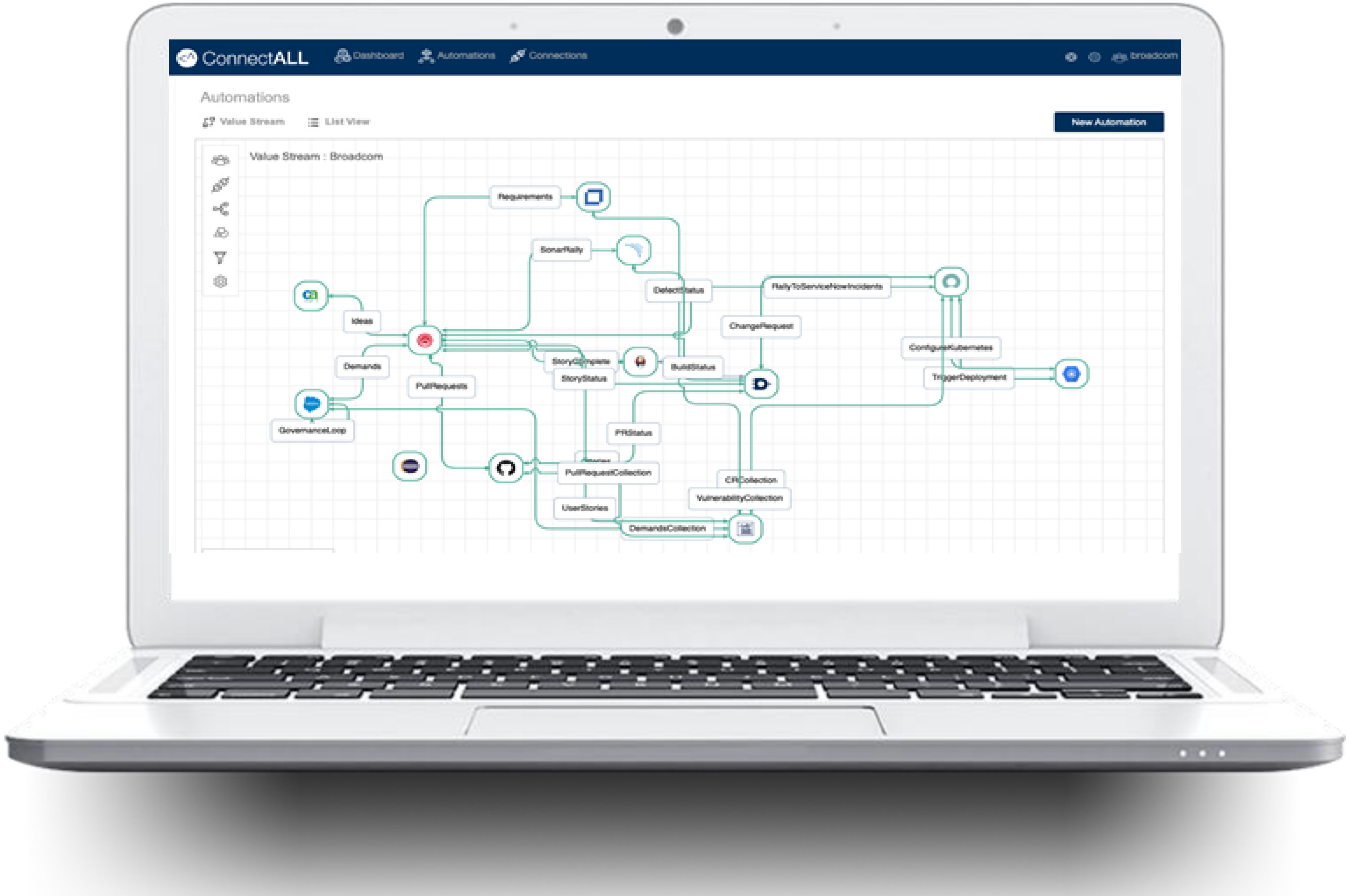
- Purpose:
  - Allow users to configure rather than code inbound integrations.
- Used For:
  - Inbound Integrations.
- Advantages:
  - Allows common integration tasks to be configured.
  - Implements best practices and standard approaches for integration tasks.
  - Avoids Clarity GEL Script limitations / 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


Visibility
Alignment
Efficiency
Release Tracking


ConnectALL
Dashboard
Automations
Connections
broadcom
Automations
Value Stream
List View
New Automation
Value Stream : Broadcom
Requirements
SonarRally
DefectStatus
RallyToServiceNowIncidents
ChangeRequest
ConfigureKubernetes
TriggerDeployment
Ideas
Demands
PullRequests
StoryComplete
StoryStatus
BuildStatus
GovernanceLoop
PRStatus
PullRequestCollection
UserStories
DemandsCollection
CRCollection
VulnerabilityCollection

Questions?

Survey

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

Your feedback is extremely important for future events.

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