



Using MSP and Smartsheet with Clarity

Your Guide:
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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



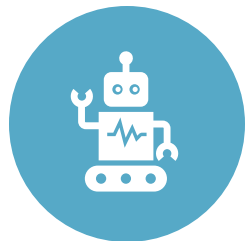
Must be able to handle export and import of 10,000 line projects



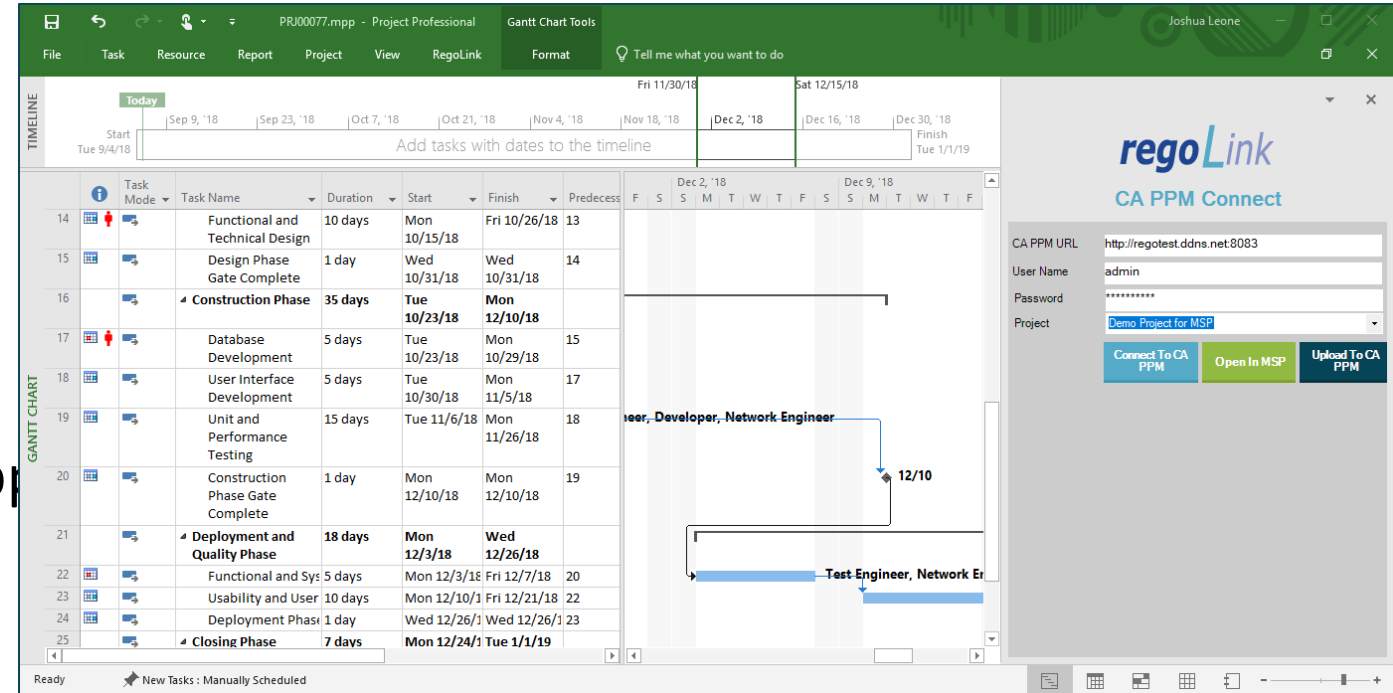
Must perform well



Must be easy to install and support

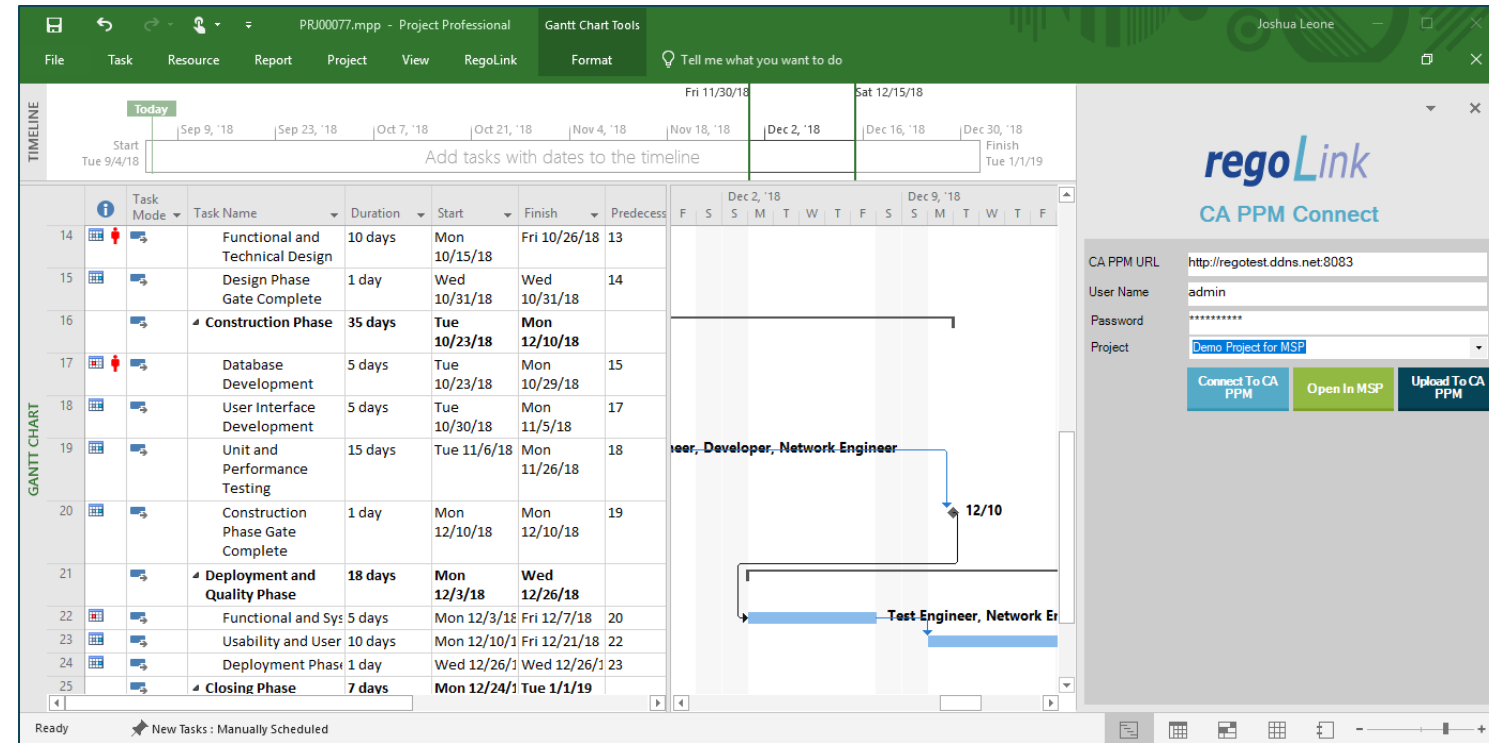


Must use the latest and greatest technology



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 and rates
 - Custom Field Support on the tasks
 - As defined in the OOTB MSP mapping object



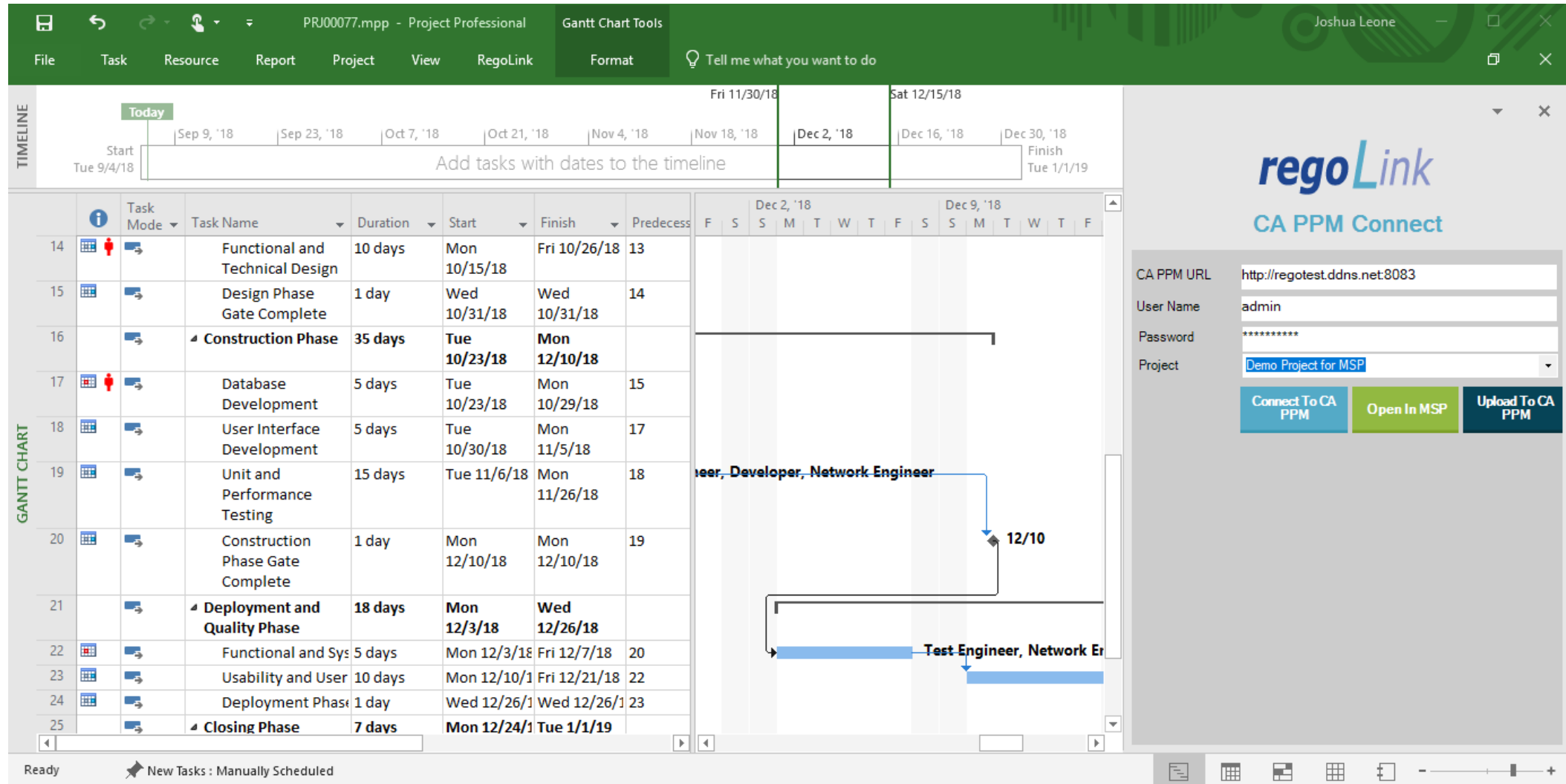
MSP – Key Differences

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

7



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

Network Diagram Calendar Other Views Task Views

Resource Usage Resource Sheet Other Views Resource Views

Sort Outline Tables Filter: Highlight: [No Highlight] [No Filter] [No Group] Timescale: Days Zoom Entire Project Selected Tasks

Timeline Timeline Details Split View New Window Macros

TIMELINE

Today

Start 11/26/18 8:00 AM 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.storage/		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

9

The screenshot shows the Microsoft Project Professional interface. The main window displays a Gantt chart and a task table. The task table lists tasks with their durations, start and finish dates, and resource names. An error dialog box is overlaid on the task table, indicating a resource assignment error.

Task Table:

Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names
0	TaunyaDemo	97 days	11/26/18 8:00 AM	4/9/19 5:00 PM		
1	Initiation Phase	1 day	11/26/18 8:00 AM	11/26/18 5:00 PM		
2	Initiating Process Con	1 day	11/26/18 8:00 AM	11/26/18 5:00 PM		
3	Planning Phase	27 days	11/27/18 8:00 AM	1/2/19 5:00 PM		
4	Define Scope Change	5 days	11/27/18 8:00 AM	12/3/18 5:00 PM		
5	Define Resource Plan	10 days	12/4/18 8:00 AM	12/17/18 5:00 PM		
6	Risk Response and M	10 days	12/4/18 8:00 AM	12/17/18 5:00 PM		
7	Identify Infrastructur	5 days	12/18/18 8:00 AM	12/24/18 5:00 PM		
8	Complete Project Pla	5 days	12/25/18 8:00 AM	12/31/18 5:00 PM		
9	Planning Phase Gate	2 days	1/1/19 8:00 AM	1/2/19 5:00 PM		
10	Design Phase	15 days	1/3/19 8:00 AM	1/23/19 5:00 PM		
11	Requirements Definit	5 days	1/3/19 8:00 AM	1/9/19 5:00 PM		Network Engineer,
12	Functional and Techn	10 days	1/10/19 8:00 AM	1/23/19 5:00 PM		Developer, Storage
13	Design Phase Gate Co	2 days	1/22/19 8:00 AM	1/23/19 5:00 PM	12FS-2 days	
14	Construction Phase	26 days	1/24/19 8:00 AM	2/28/19 5:00 PM		
15	Database Developme	5 days	1/24/19 8:00 AM	1/30/19 5:00 PM		Developer
16	User Interface Deve	5 days	1/31/19 8:00 AM	2/6/19 5:00 PM		Developer

Error Dialog Box:

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

Buttons: OK

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

- Compatible with Classic UI and MUX UI
- 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

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

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,'yyyymmdd"'"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

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 B I U

	Project Name	Project ID	Start Date	Active	Manager
1	Application COTS Tr	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 Attrit	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

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



Project Initiation

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

Compatible with both MUX and Classic UI

▼ SMARTSHEET INTEGRATION

Smartsheet Link Type ⓘ
Create New Sheet

Smartsheet Sheet Id ⓘ
6111927735740292

☒ Smartsheet Project ⓘ

Smartsheet Link
<https://app.smartsheet.com/sheets/cmqcJw6F9FfHhJr546VhcpW32XXCFxWfHFfHgM1>

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

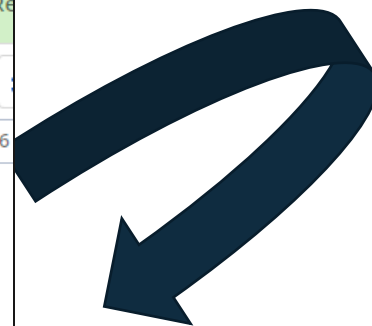
Tasks in Smartsheet

← Project SS Test 1 PRJ10398

Properties Dashboard Staff Checklists **Tasks** Risks Issues Changes Financials Project Transaction Status Report Generate Re

Actions Search... View AD Innovation View Save

WBS	Name	Start	Finish	Duration	Status	% Complete	Sep 16	Oct 16	Nov 16
1	Task 1	Oct 6, 2016	Oct 6, 2016	1	Not Started	0%			
2	Task 2	Oct 6, 2016	Oct 6, 2016	1	Not Started	0%			
3	Task 3	Oct 6, 2016	Oct 6, 2016	1	Not Started	0%			



Update and seamlessly sync using native Smartsheet functionality

Account

Help

Search...

smarts

Home

SmartSheet Demo Project

</

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	RISK-SMARTSHEET INTEGRATED BY
7521500963071876	Taunya Moore
RISK - SMARTSHEET ESTABLISH LINK/SYNCH	RISK- SMARTSHEET INETGRATION STATUS
☐	Success
RISK- SMARTSHEET LINK	RISK-SMARTSHEET INTEGRATION/IMPORT DATE
https://app.smartsheet.com/sheets/HW2WM578PWjrgX48CWWxHRCg7GqhmG6Vq3QJCP41	2022-12-01 16:09:51
RISK-SMARTSHEET INTEGRATION LOGS	RISK - SMARTSHEET IMPORT STATUS
Synch Initiated By:Tony Stark;	Success
Issue	
ISSUE - SMARTSHEET ID	ISSUE-SMARTSHEET INTEGRATED BY
219731761358724	Tony Stark
ISSUE - SMARTSHEET ESTABLISH LINK/SYNCH	ISSUE- SMARTSHEET INTEGRATION STATUS
☐	Success
ISSUE- SMARTSHEET LINK	ISSUE-SMARTSHEET INTEGRATION/IMPORT DATE
https://app.smartsheet.com/sheets/5V4q3RRP2rJwW47rFcrv5488Rv3Vj9r5QVRhH741	2022-12-01 16:09:49
ISSUE-SMARTSHEET INTEGRATION LOGS	ISSUE - SMARTSHEET IMPORT STATUS
Synch Initiated By:Tony Stark;	Success

Direct link to Risk Smartsheet

Direct link to Issue Smartsheet

Risk in Smartsheet

File Alerts & Actions Forms ☆ MK Risk Sample

Grid View Filter Arial 10 B I U S A Σ \$ % .0 .00

	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 B I U S Color Align Format Sum Percent Currency													
	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

Home

Grids

Charts

Lightbulb

Bar Chart

Monitor

+

Properties

Dashboard

Staff

Checklists

Tasks

Risks

Issues

Changes

Financials

Project Transaction

Status

Download

Search...

Select All

Deselect All

Group By

Name *

Status *

Priority * 2↑

Target Resolution Date

Resolved Date

☐ Issue 234

Open

Low

Apr 19, 2019

Questions?



Survey



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

Your feedback helps us improve future events.



Earn Rego University Certifications and Professional Specializations

Your participation in this class may count toward Rego University certification progress.

Certifications

Build recognized Clarity expertise.
Complete 10 eligible learning units
within a certification track.



**Best Practice
Clarity Administrator**



**Best Practice
Clarity Lead**

Professional Specializations

Deepen your skills in focused topic areas.
Complete 4 eligible learning units within a selected
specialization, with the option to earn multiple specializations.



**Artificial
Intelligence (AI)**



**Reporting &
Analytics**



Technical



Important: Complete the class survey in the app after each session so your credits can be tracked.

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

Earn PMI credit

Eligible Rego University sessions qualify for Professional Development Units (PDUs)

- 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!
Remember to fill out the class survey.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

<https://regouniversity.com/pmi-credits/>

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