



*rego*University 2017

Excel and CA PPM | Integration

Your Guides: Dave Matzdorf, Wes McCoubrie

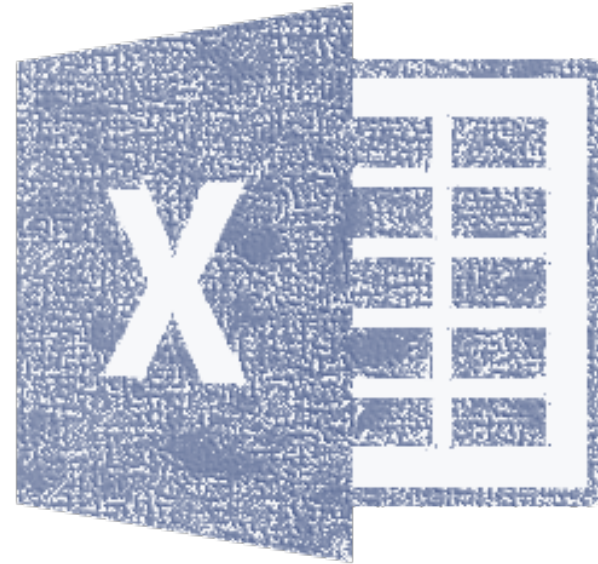
Introductions

- Take 5 minutes
- Turn to a person near you
- Introduce yourself



Agenda

- Excel: Enemy or Friend?
- Integration Methods
- Guardrails
- Excel / CA PPM Use Cases
- Demonstrations
- Summary



Excel: Enemy or Friend?

- Where do users leverage Excel?
- Why are they using Excel?
- How does this hurt CA PPM?
- How does this help CA PPM?
- Will a proclamation to use CA PPM remove Excel use?

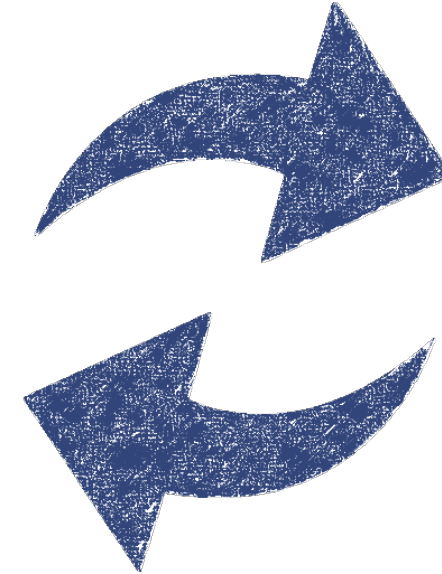


Rego Thoughts: Enemy or Friend?

- 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.

Excel Integration Methods

- Pushing data to CA PPM
 - Launch integration from Excel
 - Upload file to server
 - Attach file to object
 - Attach file to a custom upload object
- Pulling data from CA PPM
 - Initiate from CA PPM
 - Initiate from Excel



Excel Guardrails

- How do you handle authentication?
- How do you enforce user permissions?
- How do you generate unique IDs for Clarity data?
- How do you prevent data from being overwritten due to incorrect IDs?
- How do you reliably validate data going into CA PPM?
- How do you prevent users from changing the Excel template?
- How do you push new templates to users when changes are needed?

Excel/CA PPM Use Case #1: Financial Plans

- RegoXchange: Update cost and benefit plan
- Process
 1. Template created and distributed to users
 2. Users update data in Excel
 3. User uploads template to attachment field
 4. Initiates action within CA PPM to create cost plan
- Alternative
 - Attach file in the project object
 - Give access to CA PPM

Excel/CA PPM Use Case #2: Allocations

- IHG: Upload allocations for a project team
- Process
 1. Template created and distributed to users
 2. Users updated file and attach to custom upload object
 3. File data is read, validated, and uploaded CA PPM
- Alternative
 - Attach file in the project object
 - Upload right from Excel with button

Excel/CA PPM Use Case #3: Actuals Upload

- Trinity Health: Non-labor actuals loaded monthly by Administrator
- Process
 1. Export CSV from Lawson Financials
 2. Create Lawson Upload object in CA PPM
 3. Attach CSV to object instance and run validation
 4. Review error log and reload as needed
 5. Run financial posting jobs
- Alternatives
 - Interface directly with Lawson
 - Extend transaction entry capabilities to PMs

Excel/CA PPM Use Case #4: Reporting

- Chubb Insurance (On-Premise): Excel serves as ad hoc reporting medium for custom domains
- Process
 1. SQL developed by Administrator that represents the custom data set (domain).
 2. Specific user accounts granted read-only access to DWH.
 3. Data connection embedded into Excel.
 4. User refreshes Excel source table and ad hoc pivots, charts, etc. as needed.
- Alternatives
 - Jaspersoft Ad Hoc via a custom domain
 - Jaspersoft Studio report
 - Portlet-based extract (On-Demand).

Demo: Cost Plan Uploaders

*rego*University 2017

Let Rego be your guide.

Demo: Allocation Uploader

*rego*University 2017

Let Rego be your guide.

Demo:

ITROI Excel Integration Tools

*rego*University 2017

Let Rego be your guide.

Summary

- Forcing community to use CA PPM does not mean abandoning Excel.
- Excel can be your friend and your enemy; set rules of engagement accordingly.
- Think outside the box to improve adoption and data quality by any means necessary.

IT-ROI's PPM Excel Interface



Extract >> Validate >> Load



1
Get Data
Select one of the pre-loaded interfaces.

The screenshot displays the PPMExcelInterface Excel application. The left sidebar lists various data categories: Allocations, Applications, Assets, BenefitPlans, Categories, ChangeRequests, Chargebacks, Chargecodes, Companies, CostPlans, CostPlusCodes, CustomAttributes, Departments, Entities, GLAccount, Ideas, Incidents, Issues, Locations, Others, Portfolios, Products, Programs, Projects, ProjectTeams, Ratematrix, and ReleasePlans. The main area shows a large data table with columns for Project Name, Status, % Active, Is Template, Start Date, End Date, Progress, Priority, Time Entry, Open, Trackmode, Currency, ISO, and Forecast. A 'Validate' icon is overlaid on the table. The bottom navigation bar includes 'Get Data', 'Validate Data', 'Load Data', and 'PPM Tools'. A 'Load' icon is overlaid on the 'Load Data' button.

2&3
Modify & Validate

Using Excel's click & drag and cut & paste functionality.

4
Load Data
Send the modified data back to the source system with a single click.

Questions?



*rego*University 2017

Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com