regoUniversity 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?

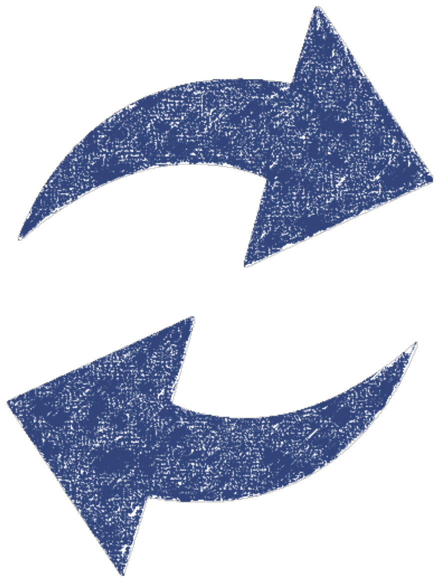
- Where do users leverage Excel?
- Why are they using Excel?
- How does this hurt CA PPM?
- How does this help CA PPM?
- Will a proclamation to use CA PPM remove Excel use?

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

Demo:
Allocation Uploader

Demo:

ITROI Excel Integration Tools

Summary

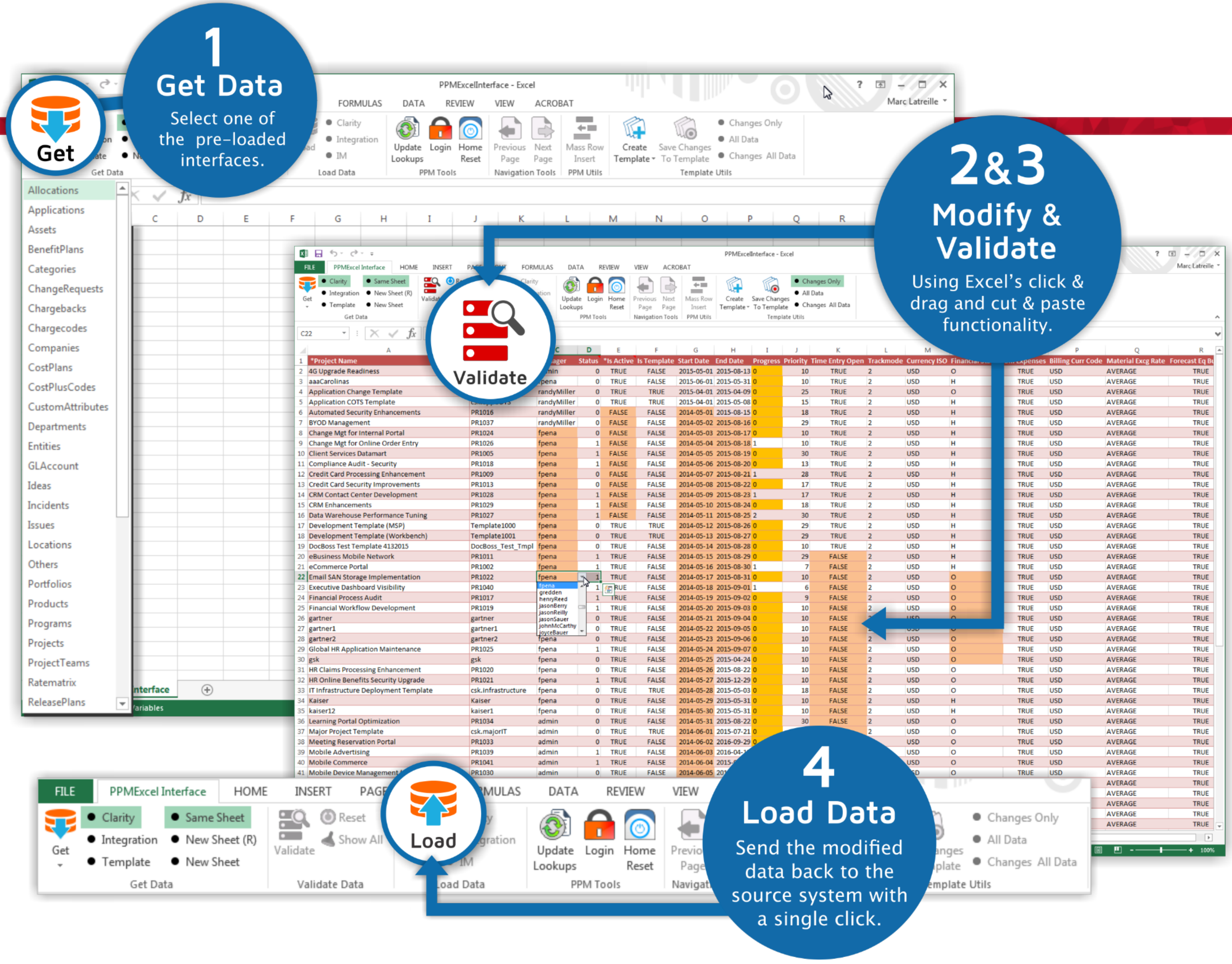
- Forcing community to use CA PPM does not mean abandoning Excel.
- Excel can be your friend and your enemy; set rules of engagement accordingly.
- Think outside the box to improve adoption and data quality by any means necessary.

IT-ROI’s PPM Excel Interface

PPM Excel Interface

Extract >> Validate >> Load

PPM Excel Interface



Questions?

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- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
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Phone
888.813.0444

Email
info@regouniversity.com

Website
www.regouniversity.com