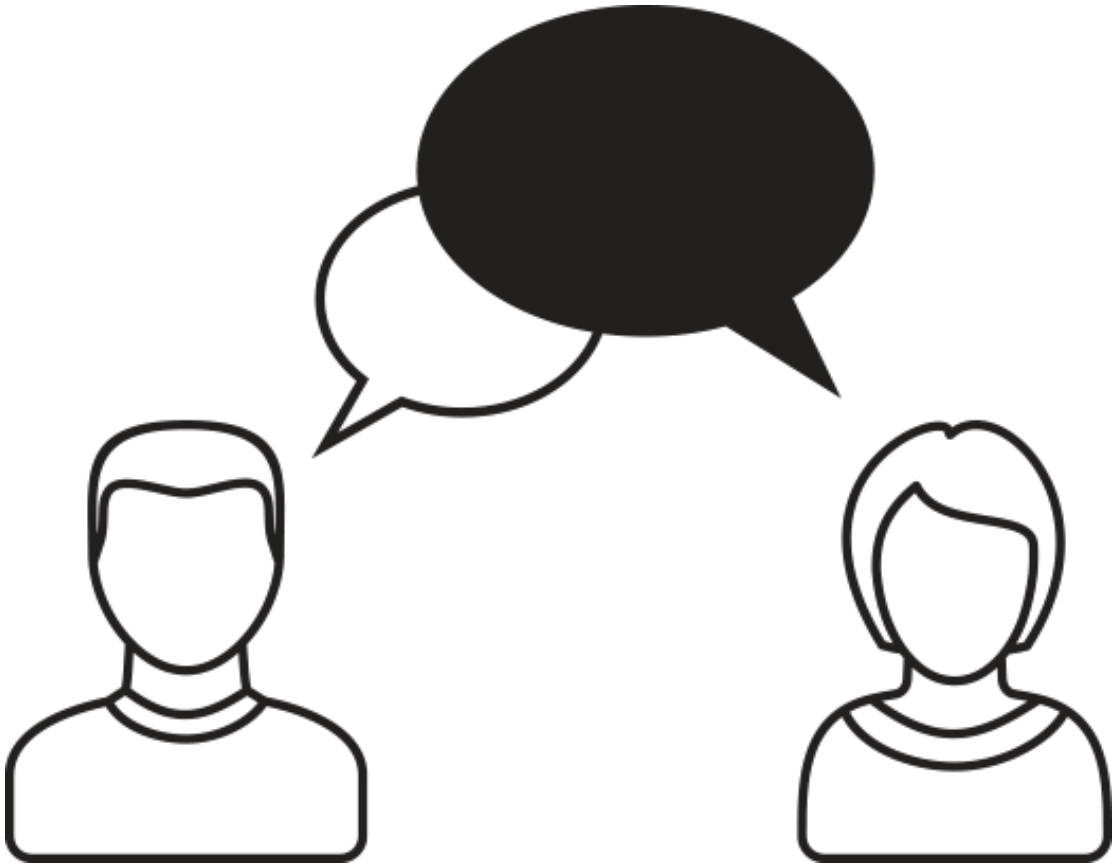

regoUniversity 2017
Integrations | Most Popular
Your Guides: Doug Greer, Wes McCoubrie

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Why Integrate?
- Integration Guardrails
- Integration Basics
  - Schedule
  - Design
  - Error Handling & Testing
- Most Popular Integrations
- Q&A with Mike Lavengood

Open Mic: Why Integrate?

- What has been the primary driver for integration in your environment?

Why Integrate?

- Eliminate administrative activities
- Eliminate double entry
- Introduce data consistency
- Accommodate trend towards diverse application ecosystem
- Facilitate business process
- Reduce license costs
- Enhance reporting

- The stereotype associated with developing an integration needs to be debunked.
- 10 years ago, integrations where very expensive and technically challenging. Now, with improved integration technology and frequency, integrations are much more cost effective.
- $10K is the cost of a typical Rego integration

Integration Guardrails

- Who should be the source?
  - CA PPM should NOT be the source of all truth
  - CA PPM is a decision making tool
  - It needs the information to make decisions, but not necessarily the source
- Is the process mature?
  - Integrations are built to match process
  - You must detail 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

Integration Guardrails

- Simpler is better
  - With integrations, the more complex the interface is the more difficult it will be to build and maintain
  - One direction vs. bi-direction is simpler
- Get it right the first time
  - We love agile and iterative development, but not when building an interface
  - Interfaces are best done with solid waterfall requirements and signoffs
- Integrations are recurring jobs
  - Integrations are not for performing one time data loads
  - Integrations are for exchanging data between two systems on a regular basis
- Data ownership is key
  - You must determine which system is the “source” vs. the “non-source” of the data
  - One source must be the owner of the data in case of conflict
  - Do not make the mistake to think CA PPM will be the “source” of everything
  - Leverage other systems to pull summarized data vs. all detail

Integration Basics

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When Should An Interface Run?

- Event based
  - This type of Interface is triggered by event in the system (something got created or updated or deleted)
- Batch
  - This type of interface is scheduled and triggered at a set time (nightly or at certain interval, etc.)
  - Since, batch interfaces will handle multiple instances, you want to address transaction managements (what happens when a record fails – one fail, all fail?)
- Manual
  - This type of Interface is manually started by the user when they are ready for data transmittal

How Should An Interface Be Designed?

- Flat File: CSV export
- Web Services: REST/SOAP
- Database Links (On Premise Only): Database to Database
- Third Party Tools
  - ITROI
  - Pervasic
  - Task Top

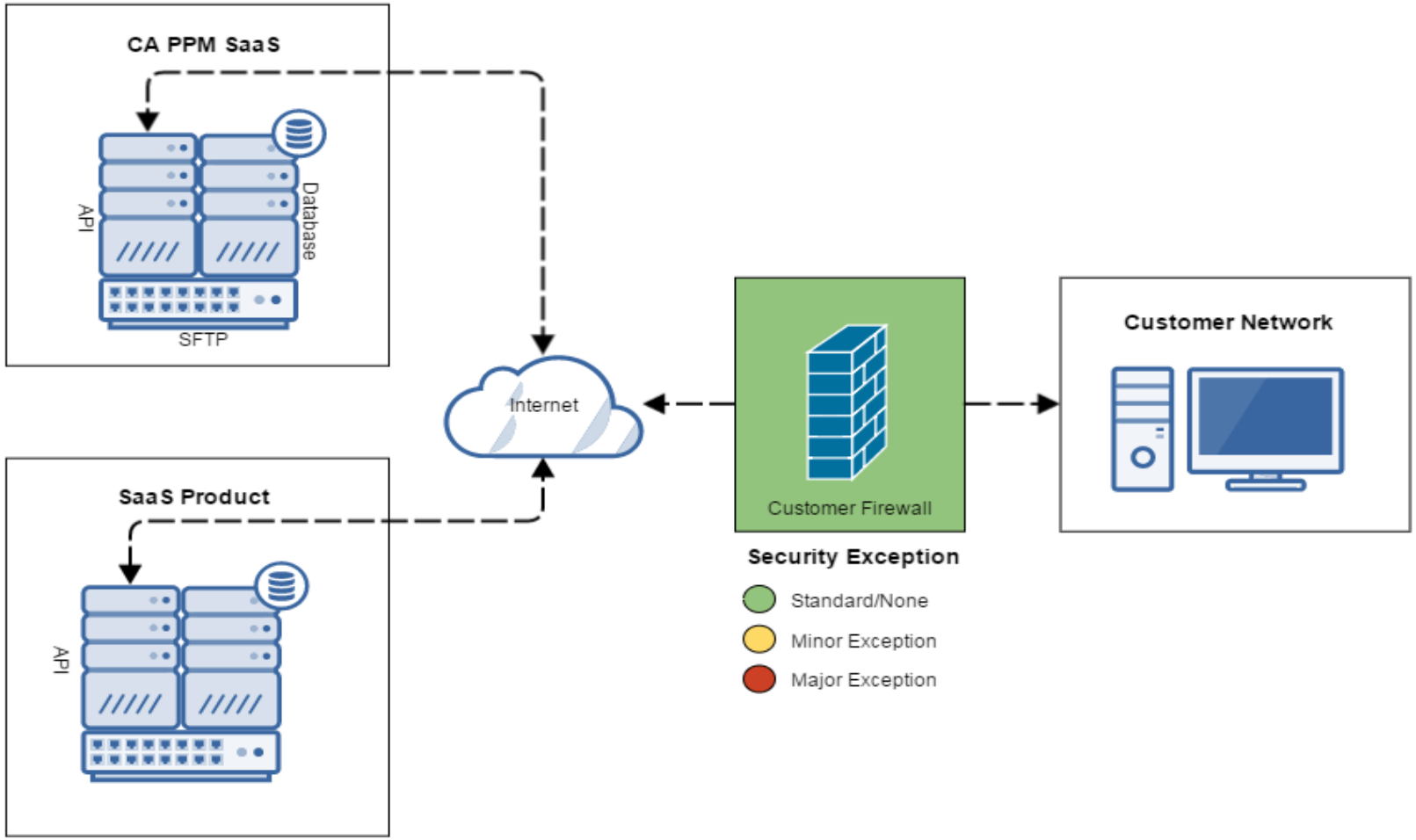
Comparing Methods

	Flat File	Web Services	DB Link
Available in SaaS	Yes	Yes	No
Rough effort*	40-60 hours	60-80 hours	40-60 hours
Examples	• Send journal entry for capital entry • Read data from any legacy system	• Create SAP project from new CA PPM project • Auto create support tickets in CA PPM by reading data from ticketing system	• Pull non-labor financials to CA PPM • Pull resources into CA PPM • Push assignment data from CA PPM
Components	• Process to read • Error object	• Process for outbound • Java for inbound • Error Object	• View to read • Process to move from view to object • Error object

*With an integration, effort is needed on both the sending and receiving application. This means that any CA PPM integration will require some effort form the support team of the system you are integrating to. The level of effort depends on the type of interface.

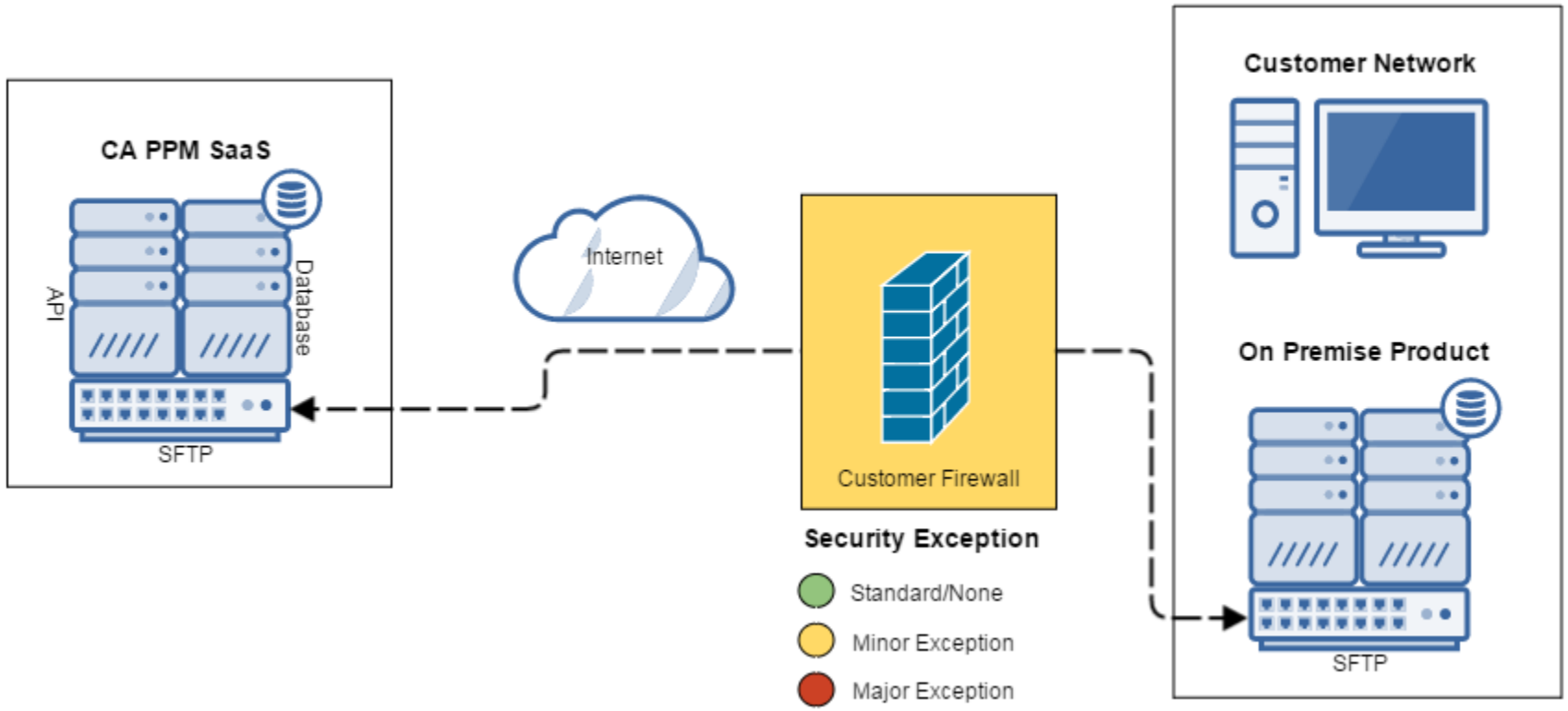
Methods

SaaS API/Web Service/REST



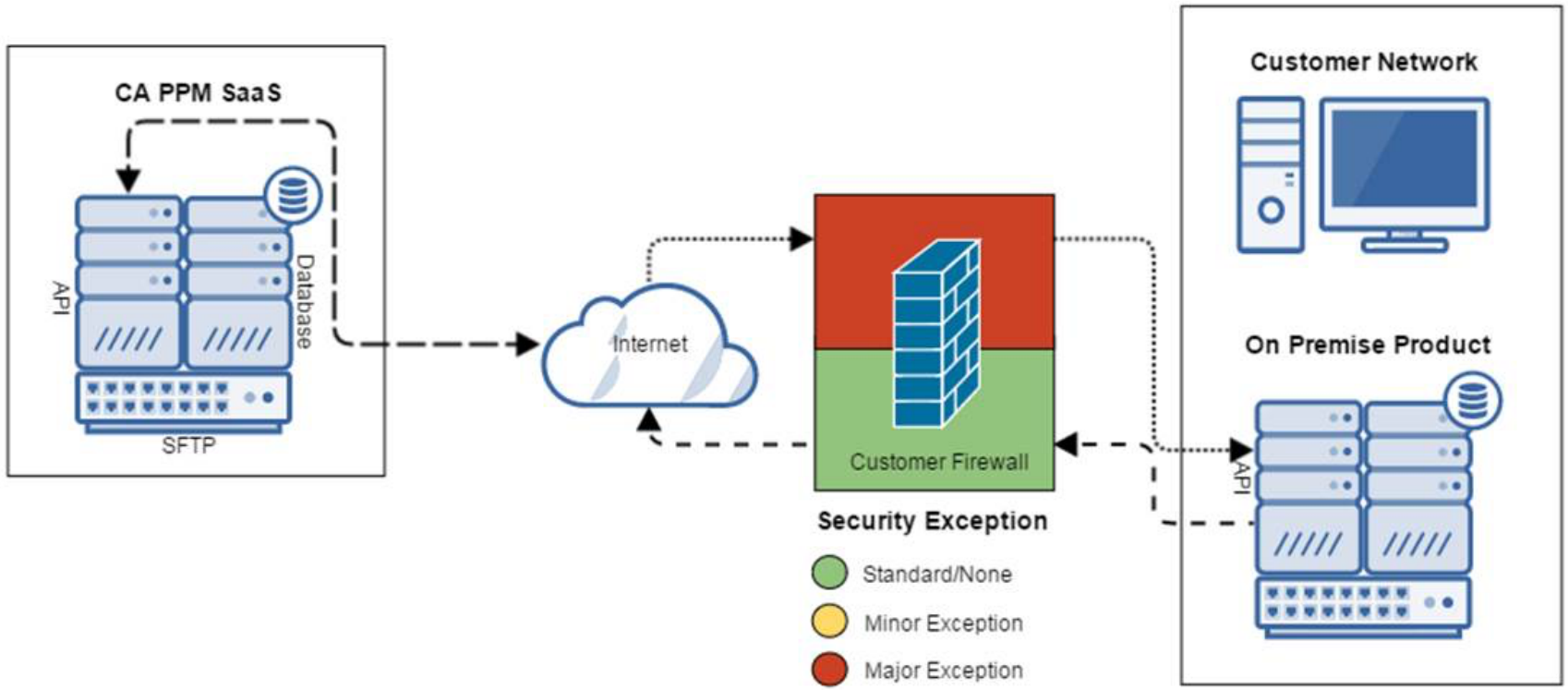
Methods

Flat file/SFTP



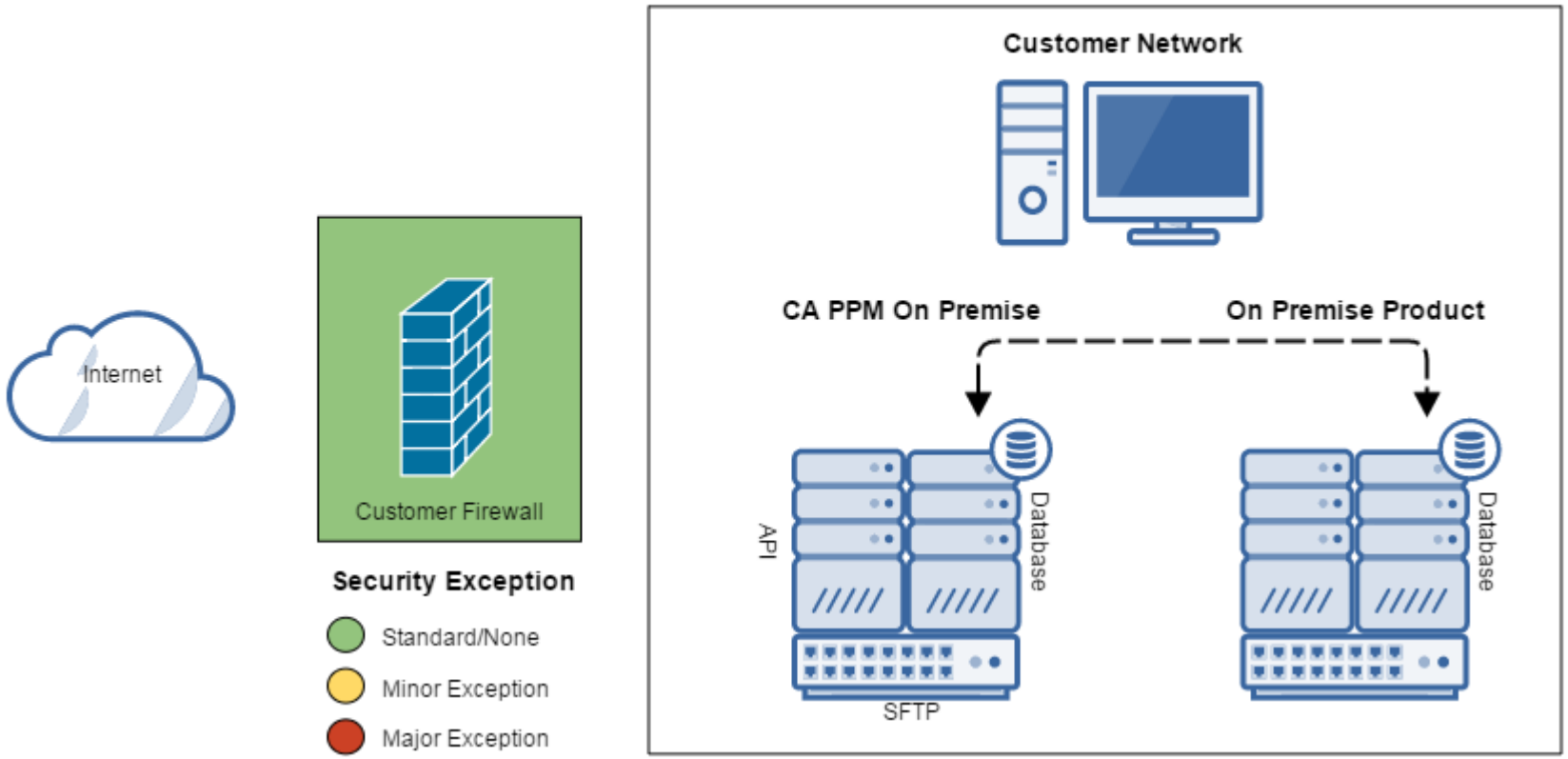
Methods

On-Premise API/Web Service/REST



Methods

On-Premise to On-Premise via dblink



Error Handling & 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
  - 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

Most Popular

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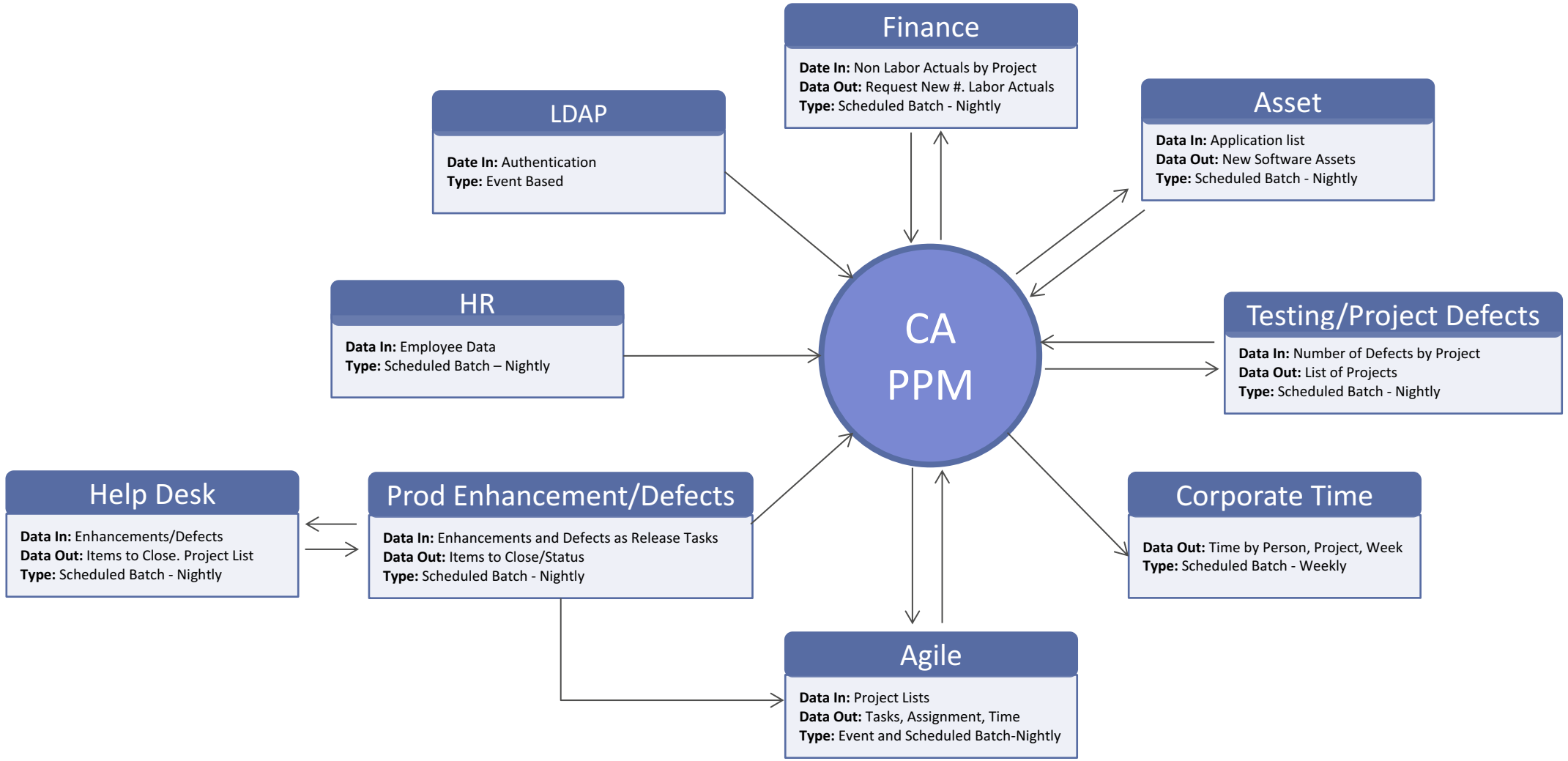
Most Common Integrations

- Agile (Jira, Agile Central, V1, TFS, etc.) - API
  - Project lifecycle
  - Time entry
  - Capitalization expense
- Financial (SAP, Oracle, etc.) – flat file
  - Transactions and time sheets
  - Cost plans
- HR (Peoplesoft, etc.) – flat file
  - LDAP/AD, User syncing
  - Employee reporting structure, cost centers
- ITSM (SNOW, etc.) - API
  - Demand and idea management
  - Ticket escalation

Most Common Integrations



Questions?

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Q&A with Mike Lavengood

- Mike originally developed and managed an in-house PPM tool (PIMS) for Mylan Pharmaceuticals. He then served as the lead administrator and technical resource on their subsequent CA PPM deployment that went live in January 2017. Mike developed all the system integrations, both inbound and outbound.
- Who thinks they have “over-integrated”? Why?
- Who thinks they have “under-integrated”? Why?
- Any interfaces in your environment not discussed today?

Appendix

Know The Source: Examples

CA PPM is NOT the Source

- Demand Management
  - Demand fed from SharePoint or SalesForce
- Project Management
  - Tasks fed from Agile Tool
  - Issues, risks fed from SharePoint site
- Time Management
  - Time fed from corporate system or Agile system
- Financial Management
  - Non-labor actuals fed from financial system
  - Contractor actuals fed from vendor management system
- Resource Management
  - Resources fed from HR System

CA PPM is the Source

- Demand Management
  - Resource and financial forecast for demand
- Project Management
  - Project information
  - Tasks and/or milestones (except Agile and ITSM)
  - Resource and Financial Forecast
  - IRC + Status
- Time Management
  - Actual time
- Financial Management
  - Average rates for forecasting
  - Financial forecast
- Resource Management
  - Idea and project demand
  - Resource information

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