



regoUniversity 2019

SAN DIEGO

# Clarity Integrations | Most Common

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# Introductions

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



# Agenda

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- Why Integrate?
- How you Integrate
- Most common Integrations
- Lessons Learned

# Part I: Why Integrate?



Let Rego be your guide.



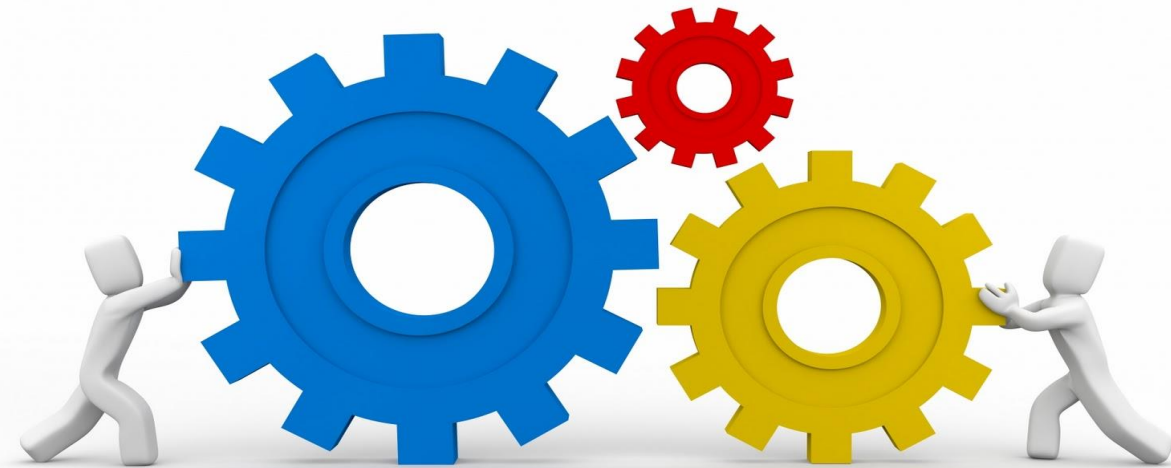
# Open Mic: Why Integrate?

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

# Why Integrate Is Important

**System integration** is becoming more important due to the increasing advances in automation technology, and the associated need to simplify processes for easier management. An **integrated system** will streamline your processes, reduce costs and ensure efficiency.



# Benefits Of Integration

- **Easier for Administrators and Users**
  - Eliminates use of multiple tools, reducing training time and lessens change of human error
- **Cost and Storage Savings**
  - Reduce time spent on upkeep and troubleshooting
  - Decrease storage and application costs
- **Better Analysis**
  - Easier access to centralized and normalized data
- **Improved System Security**
  - Fewer points of access to protect
- **Opportunity for Real Time Data**
  - Improved visibility for more accurate and timely decisions
- **Accelerated Growth and innovation**
  - Reduce process steps to allow more time for value add activities

# Part II: How you integrate



Let Rego be your guide.



# Integrations Have Come A Long Way

- Ten years ago integrations were very expensive and technically challenging
- Integration technology has evolved becoming more dependable, timely and cost effective
  - Web Services
    - SOAP
    - REST
    - GraphQL – Bleeding edge
  - 3<sup>rd</sup> Party Services
    - IAAS
    - Webhooks
- The cost of a typical Rego Integration is \$8K inbound and \$6K outbound

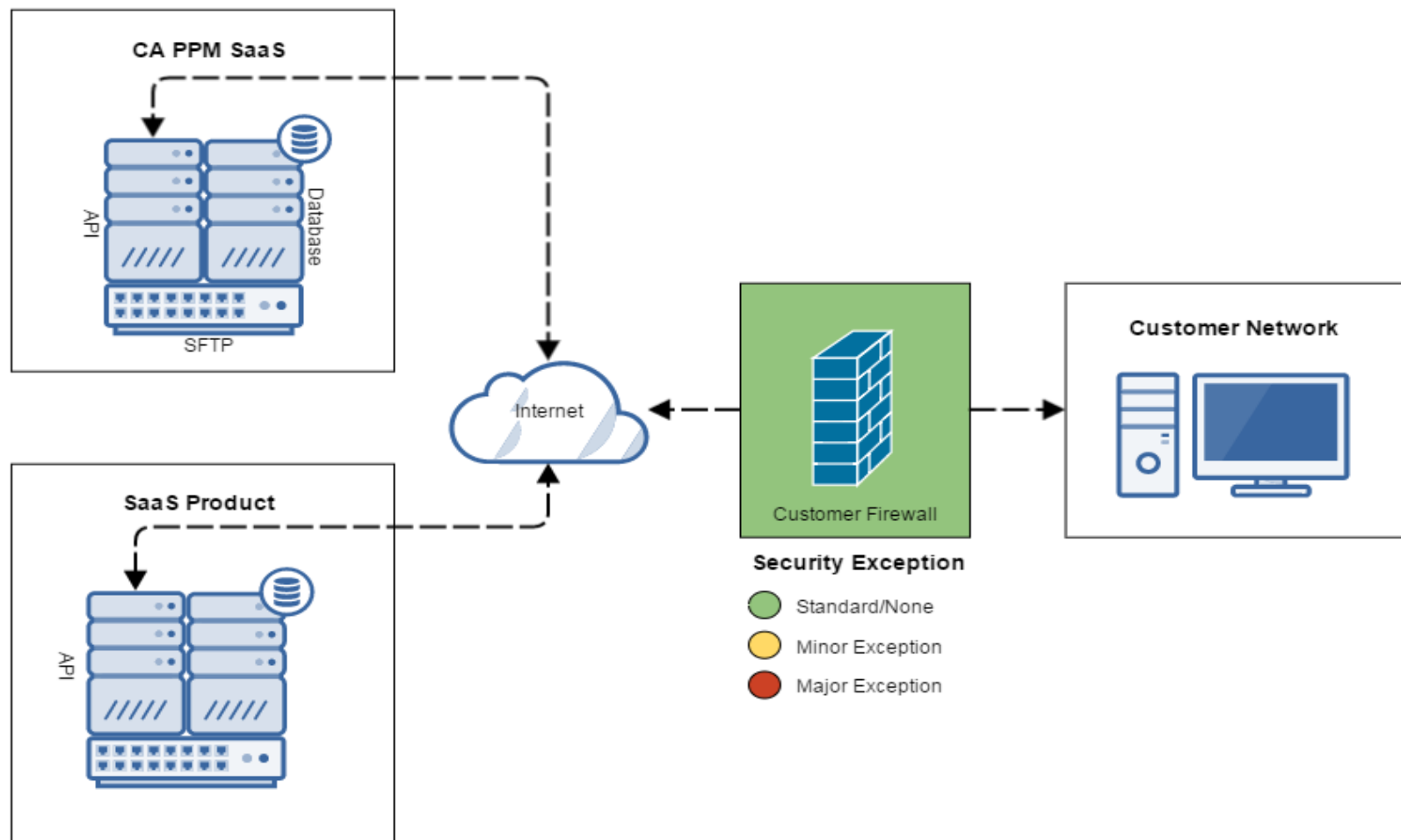
# When Should An Interface Run?

- 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

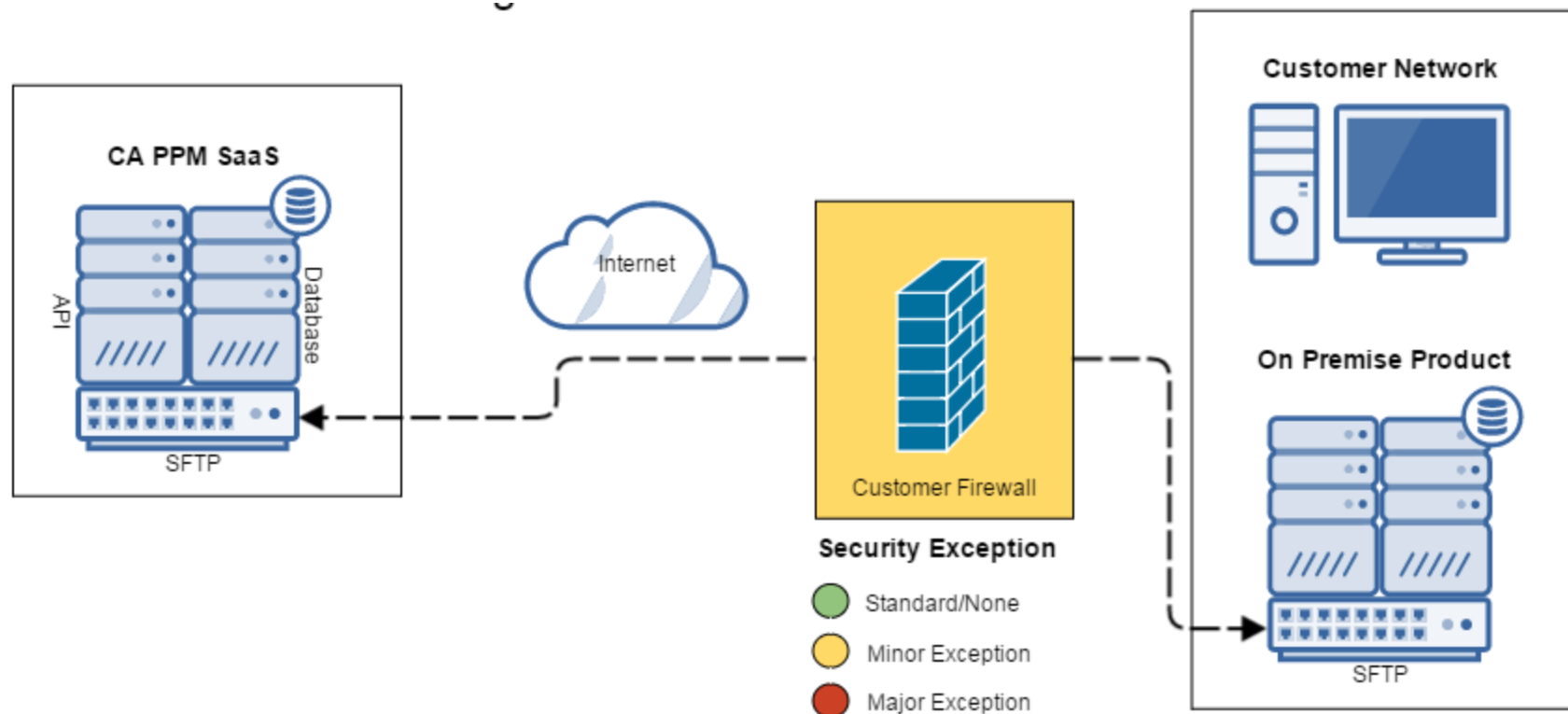
# How Should An Interface Be Designed?

- Flat File: CSV export
- Web Services: REST/SOAP
- Third Party Tools
  - Dell Boomi
  - Cast Iron
  - Tasktop

# Method –API / Web Service / REST



# Method – Flat file / SFTP





# Part III:

# Most Common Use Cases



Let Rego be your guide.

# Open Mic

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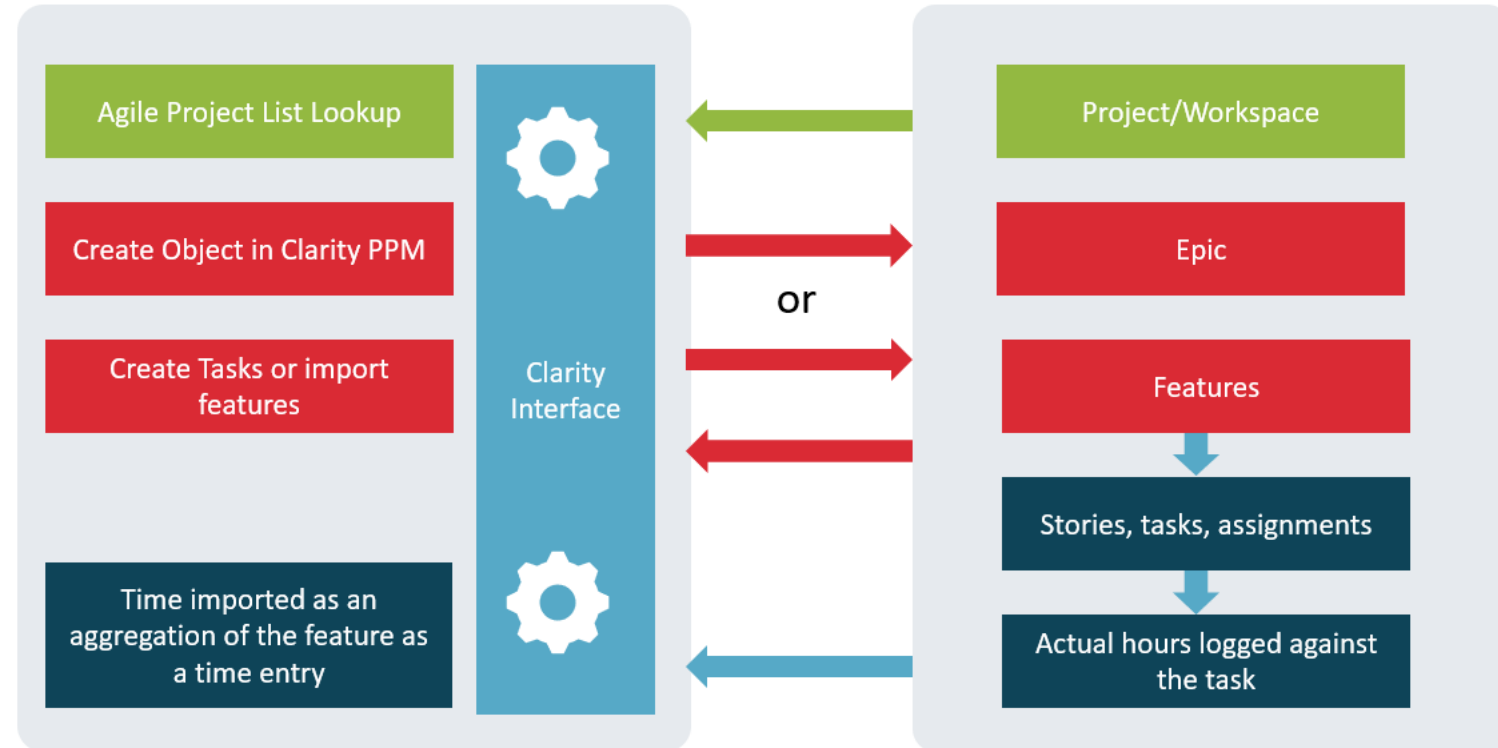
- What integrations do you have in place today?
- How do they work for you?
- What integrations do you have on your roadmap for the next year?

# Rego Standard offering – 80% of implementations

- Govern and report from Clarity
- Execute in the Agile tool
- Customizable any workflow
- Connect to multiple Agile tools at once
- Optional - Agile workshop
  - Onsite or offsite

Content
<b>Intro</b> <ul style="list-style-type: none"><li>• Kick-off</li><li>• Workshop purpose/agenda review</li><li>• How we'll do this</li><li>• Critical success criteria</li></ul>
<b>Review</b>
<b>Objectives/Stories</b> <ul style="list-style-type: none"><li>• Review submitted user stories (if applicable)</li></ul>
<b>Mapping</b> <ul style="list-style-type: none"><li>• Project level</li><li>• Task level</li><li>• Attributes</li></ul>
<b>Financials</b> <ul style="list-style-type: none"><li>• How do we calculate costs</li><li>• How do we differentiate capital/operating costs if needed</li></ul>
<b>Resources</b> <ul style="list-style-type: none"><li>• How might resources/staffing be handled</li></ul>

Content
<b>Time tracking</b> <ul style="list-style-type: none"><li>• Are there any deviations needed to the standard connector time-tracking approach</li></ul>
<b>Reporting</b> <ul style="list-style-type: none"><li>• What metrics are needed</li><li>• What views/reports are needed</li></ul>
<b>Exception processes</b> <ul style="list-style-type: none"><li>• How do we handle exceptions (i.e. story moves from one project to another, etc.)</li><li>• What is an error vs a warning</li></ul>
<b>Data migration approach</b> <ul style="list-style-type: none"><li>• To go-live, how will we establish all of the connections for existing projects</li></ul>
<b>Conclusion</b> <ul style="list-style-type: none"><li>• Review open items/parking lot</li><li>• Review captured stories</li><li>• Discuss next steps</li></ul>



# Most Common Integrations

- Agile Tools
  - Who - Jira, Agile Central, V1, TFS, Rational
  - How - API
  - What - Project Lifecycle, Time Entry, Capitalization Data
- ERP/Financial Systems
  - Who - SAP, Oracle, JD Edwards, Lawson, Sage, Great Plains, Infinium, Peoplesoft
  - How - Flat file
  - What – Direct Expenses, Time Entry, Cost Centers Forecasts, Budgets
- HR/ Resources Systems
  - Who – ERP Systems, Active Directory, Workday, CA On Demand Portal
  - How – Flat file
  - What - LDAP/SSO, Users and Resource Data, Organizational Structure,
- ITSM
  - Who – ServiceNow, CA Service Desk, Remedy
  - How - API
  - What - Idea and pipeline management, Ticket Escalation, Enhancement requests

# Other Integrations

- Schedulers
  - Smartsheet
- Vendor Management
  - Beeline, Deltek, Fieldglass, Ariba
- Time Management
  - Kronos, Smart Track
- Demand Intake
  - SharePoint, Webforms, Salesforce
- Applications
  - Troux
- Reporting Extracts
  - Cognos, Power BI, Generic Data Warehouses



## ITSM



## Intake and Collaboration



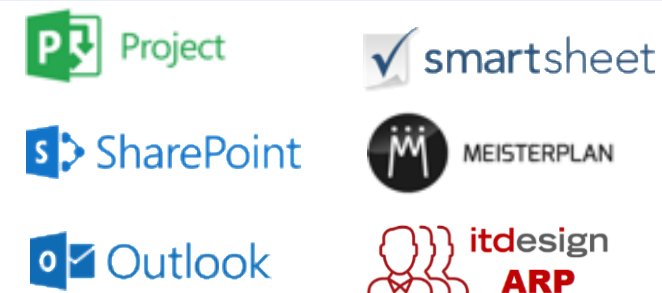
## Applications



## Vendor and Time Management



## Project and Resource Management



Wagile Board

Action Item  
ResponderEnhanced MSP  
Integration

# regoLink

Innovation and integrations for Clarity

SQL Data  
ExtractorChannel  
PackRoadmap  
Printer

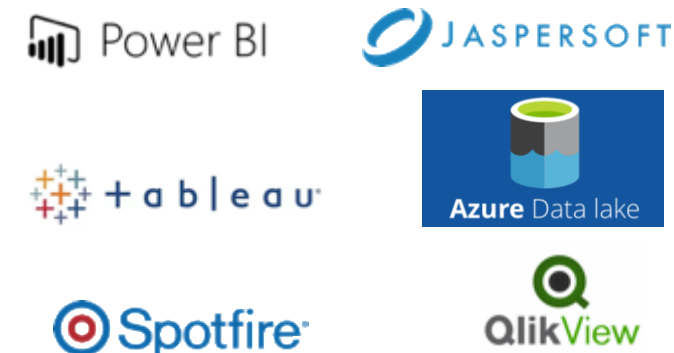
## Agile Integrations



## HR/Resource/Financial



## Reporting and Business Intelligence



# Part V: Lessons Learned



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# 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
  - Identify the key integration points and invest in doing it correctly

Objective: Get More Out of your PPM Investment!

# Error Handling & Testing

- Error handling / transaction management
  - Errors are inevitable when two different systems are being integrated
  - Plan to develop an error handling 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

# Questions?



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- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- 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!  
Don't forget to fill out the class survey.



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