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# Clarity and Rally Integration | OOTB and Rego

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# Introductions

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



# Agenda

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- Introduction/overview
- Context: Waterfall vs Agile
- Agile Team Level
- SAlFe
- Tools

# Why Integrate

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# Primary objectives for integrating

(ordered by popularity)

- Performance monitoring
  - Decision-makers want a one-stop-shop for monitoring investments
- Timetracking
  - Avoid duplicate time-entry systems
  - Avoid requiring staff to track work in one tool and charge time in another
- Financial
  - Use Clarity as the source to track funding, forecasted costs, actual costs, etc.
  - Labor capitalization
- Resource management
  - Generate an understanding of where people are spending their time

# Rego's Rally connector vs CA's OOTB connector

## CA's OOTB Rally integration

Pros	Cons
Comes out of the box	You must switch on the new UX timesheets for everyone in order to use timetracking (the CA PPM new UX timesheet is presented within Agile Central)
Allows each project to choose the direction of the integration for the data for that project	Limited in what fields are mapped between applications – can't map custom fields in AC to CA PPM
	Must be using CA PPM 15.4 to map user stories to CA PPM tasks
	If Initiatives are already created in AgileCentral it's a bit cumbersome to map those existing Initiatives to CA PPM projects

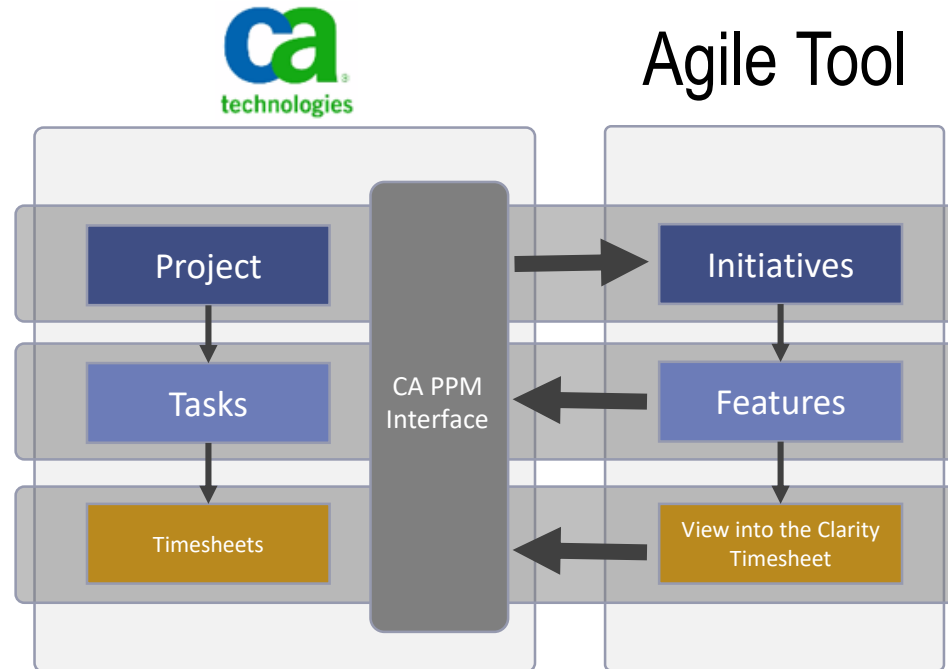
## Rego's Rally integration

Pros	Cons
Complete control around data attribute mapping	Additional cost
Much more flexibility and options around mapping the project hierarchy	Requires some design and decisions
Can continue to use the classic interface for timetracking	
Engineers do not even have to know their time is being pulled into CA PPM	
Can support any type of algorithm regarding deriving time such as tracking Kanban stories (similar to a stopwatch), and doesn't require a user to enter actuals anywhere	
Can easily map existing AgileCentral Initiatives to CA PPM projects	

# CA's OOTB Agile Central Connector

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# CA's OOTB Agile Central Connector





# Agile Add-in

To get started, the Agile Addin must first be installed.

For SaaS customers, a ticket to CA is placed.

OnDemand customers can review the documentation on [docops.ca.com](http://docops.ca.com) for their version.

### Content Add-Ins

Content Add-In Name

Content Add-In ID

Content Add-In Type





Status

Version

Filter

Show All

Clear

Content Add-In		ID	Description
Agile Addin	<input checked="" type="checkbox"/> 	agl	Integration between PPM and Agile System
Application Portfolio Management	<input checked="" type="checkbox"/> 	apm	A collection of dashboard and reporting content to be used in conjunction with the PMO Accelerator
Accelerator: Program Management Office	<input checked="" type="checkbox"/> 	csk	A generic collection of portlets, queries, reports and other content designed to jumpstart your PPM implementation
System: PPM content	<input checked="" type="checkbox"/> 	clarityContent	General content for the PPM application. These items are automatically installed when the PPM application is installed.

Upload Content Package

# Multiple integration options

Multiple integration control records can be created. One for each type of integration.

For example, some projects can pull information from AgileCentral while others might push information back to AgileCentral.

The screenshot shows the 'Integrations' page in the CA PPM Administrator interface. The page has a dark header with the CA PPM logo and navigation links (HOME, ADMINISTRATION, FAVORITES). Below the header, there's a section titled 'Integrations' with a filter dropdown set to 'None'. There are input fields for 'Integration Name' and 'Integration ID', and an 'Active' dropdown set to 'All'. Below these are buttons for 'Filter', 'Show All', 'Save Filter', and 'Clear'. A table lists two integrations: 'Agile Central to PPM' (AGL0001) and 'PPM to Agile Central' (AGL0002), both with the URL 'https://rally1.rallydev.com' and marked as 'Active' with yellow checkmarks. At the bottom, there are 'Save' and 'New' buttons. The status 'Displaying 1 - 2 of 2' is shown at the bottom right of the table area.

	Integration Name ▲	Integration ID	Integration URL	Active
<input type="checkbox"/>	Agile Central to PPM	AGL0001	https://rally1.rallydev.com	✓
<input type="checkbox"/>	PPM to Agile Central	AGL0002	https://rally1.rallydev.com	✓

# Creating an Integration Control Instance

General Rally

Integration - Agile Central Integration Properties - Rally

**Policy Details**

Portfolio Item Type Map (Project) Initiative  
( Recommend not to change this value after synchronizing with Rally. See documentation for more details )

Portfolio Item Type Map (Task) Feature  
( Recommend not to change this value after synchronizing with Rally. See documentation for more details )

Create and Sync Team ☒

Create and Sync Tasks ☒

→ Create Direction ☒ [--Select--]  
Agile Central to PPM ( Agile Central to PPM direction during synchronization )  
PPM to Agile Central

**Team - Create Defaults**

Open for Time Entry Yes

**Task - Create Defaults**

Open for Time Entry ☒

Cost Type [--Select--]

Charge Code [--Select--]


Time Tracking Project Template  
( Not enabled for PPM to Agile Central create direction )

# Link the PPM Project to Agile Central

- When you're ready to launch the integration, check Synchronize
- The next time the sync job runs, this project will synchronize.
- The rest of the fields displayed here are updated from AgileCentral Portfolio Item during each sync.

Dashboard | Properties ▾ | Team | Tasks | Financial Plans | Chargebacks | Hierarchy | Risks/Issues/Changes | Collabor

Project: eCommerce Portal - Properties - Main - Agile Summary

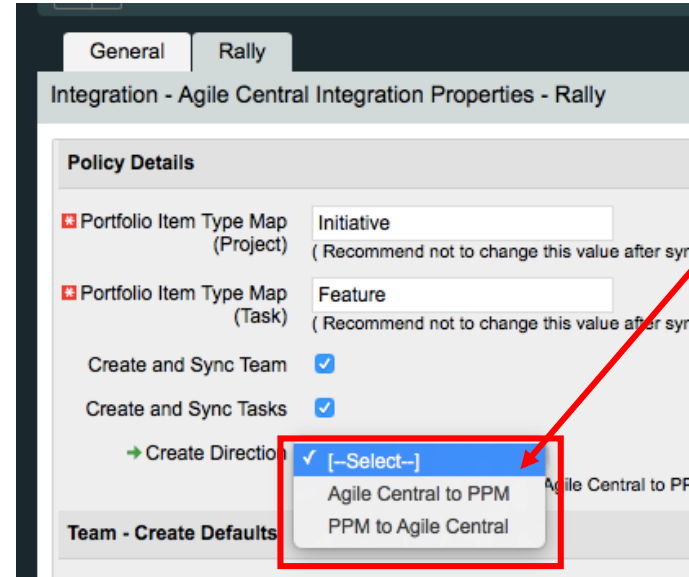
Agile	
Synchronize <input type="checkbox"/>	Agile Investment Category
 → Agile System <input type="text" value=""/>	Agile Risk Score
Initiative ID	Agile Value Score
Agile State	WSJF Score (SAFe scoring attribute)
Agile Preliminary Estimate	
Schedule	
Agile Planned Start	Agile Actual Start
Agile Planned Finish	Agile Actual Finish
Agile Release	Agile Milestones
Story Metrics	
Estimated Story Points	Estimated User Stories
Accepted Story Points	Accepted User Stories
% Done By Agile Plan Estimate	% Done by Story Count
Sync Job Information	

# What are we hearing/experiencing with clients

- Many are still not ready to switch over to the new UX for timesheets
- Some want more control around what fields and values get mapped between tools
- Some want more control around where and how to place tasks from AgileCentral into CA PPM
  - OOTB connector just placed everything at the highest level of the WBS
  - Rego connector can use logic to place things anywhere in the WBS, for example directly into the “Development Phase”
- Some want more control around labor capitalization logic
  - OOTB connector uses a default value for everything when importing—each task will either default to Capex or Opex
  - Rego connector can use logic to determine capitalization, for example, one client had a custom attribute in AgileCentral, and based on which value was selected, the Rego connector sets whether it is Capex or not in CA PPM
- Some other constraints we’ve run into
  - Required values for custom attributes in AgileCentral make it impossible to feed information from CA PPM to AgileCentral

# Another important consideration

- Regardless of which direction is created...
  - The typical flow is to create Initiatives in Rally from Clarity Projects
  - However, with a few Admin tweaks, existing Rally Initiatives can be linked to Clarity projects



Even if "Agile Central to PPM" is selected, CA PPM will create a new Initiative in AgileCentral



# Rego's Agile Central Connector

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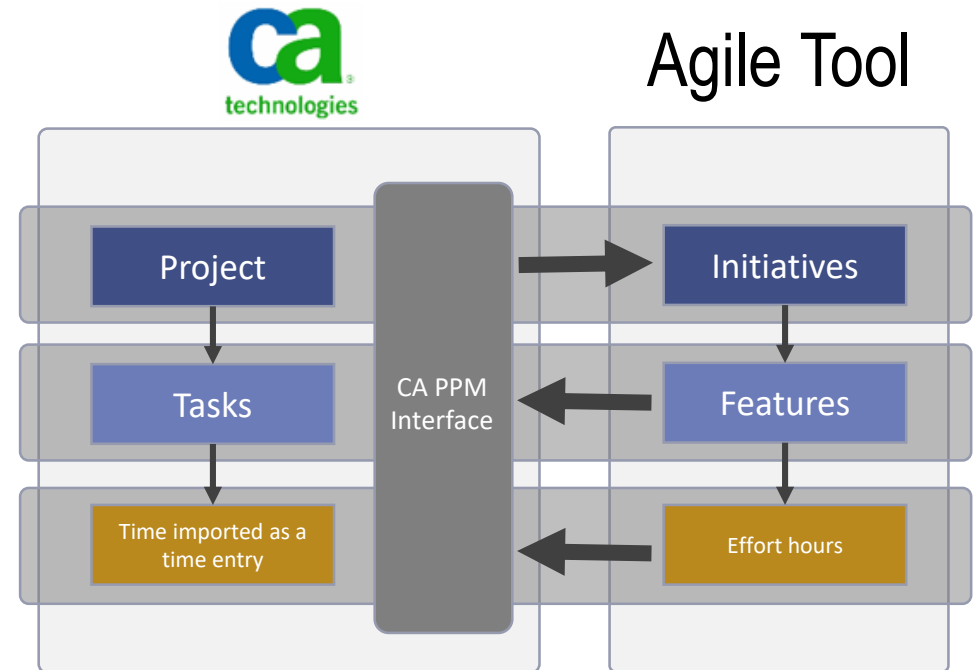
# Rego's Agile Integration for CA PPM

Our CA PPM – Agile tool base integration has been crafted based on numerous client integrations.

While the direction of the feeds shown in this image are fairly standard, our connector allows us to switch direction and meet other needs such as:

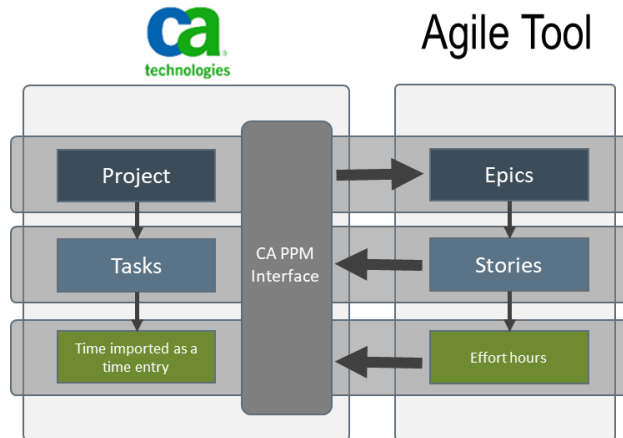
- Map Parent Tasks and Sub Tasks in CA PPM to a hierarchical structure in the Agile tool
- Switch direction of the feeds
- Capture time in non-traditional ways such as through queuing in Kanban approaches
- Create any set of data attribute mapping between systems
- Support timesheets in a number of different ways
  - Including timesheets without timesheet entry
- Allow you to map existing AgileCentral Initiatives to CA PPM projects

Standard Rego CA PPM – Agile connection  
(but can be tailored)

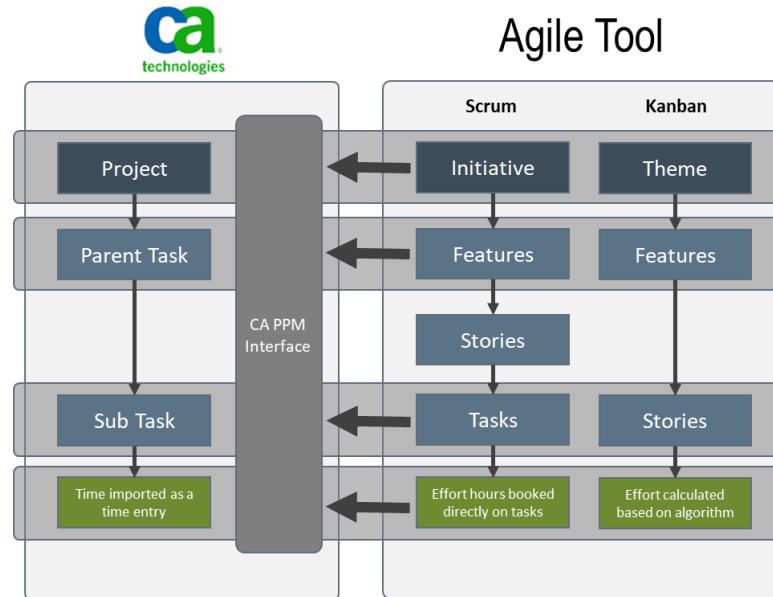


# Our Experience runs the gamut of complexity

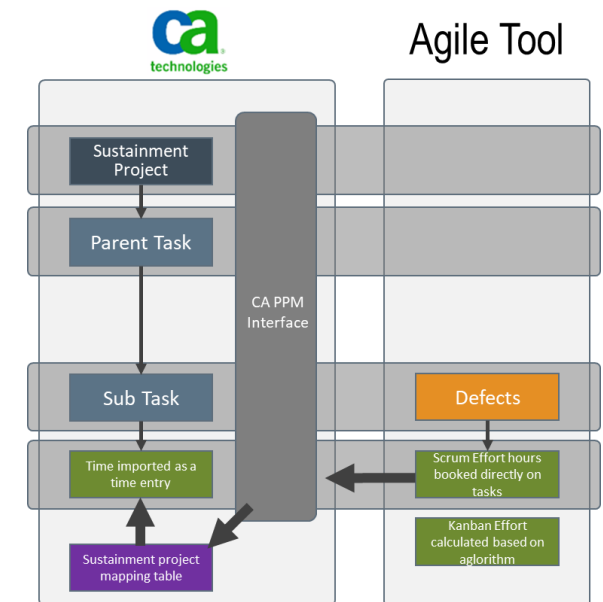
Standard PPM – Agile connection



Handling multiple Agile methods



Handling Defects



# Time-tracking method

- Our connector monitors the “Actual” or “Time Spent” field in AC at the Task or User Story
- Each day it checks that value and looks for the delta of that value from the previous day and derives a daily actual amount

**Monday:** The developer documents 8 hours to this Task in AgileCentral

ca technologies | Sample Project | Plan | Track | Quality | Portfolio | Reports

TA12 Task - Browse safaris

Details

STATE \* STATUS TASK EST TO DO ACTUAL TIME SPENT COLOR

D 20 20 8 0

**Tuesday:** The developer documents the accumulated hours to the Task in AgileCentral

ca technologies | Sample Project | Plan | Track | Quality | Portfolio | Reports

TA12 Task - Browse safaris

Details

STATE \* STATUS TASK EST TO DO ACTUAL TIME SPENT COLOR

D 20 20 16 0

User stories or user story tasks are often aggregated at a higher level such as the Feature level when fed into CA PPM (but they don't have to be)

Timesheet

Time Period: 3/26/18 - 4/1/18

Resource Name Robert Greca Modified by Robert Greca

Timesheet Status Open Last Modified 3/28/18 11:04 AM

Investment	Description	Input Type Code	Mon 3/26	Tue 3/27	Wed 3/28	Thu 3/29	Fri 3/30	Sat 3/31	Sun 4/1	Total	ETC
<input type="checkbox"/>	Feature A	Feature Description	Off-Site Hours	8	8					0.00	0.00
Total				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Add Task Add Incident Split Delete

Save Submit for Approval Populate Cancel

Work Effort = Hours

The connector figures out the delta and creates a daily timesheet entry

A powerful one-two punch

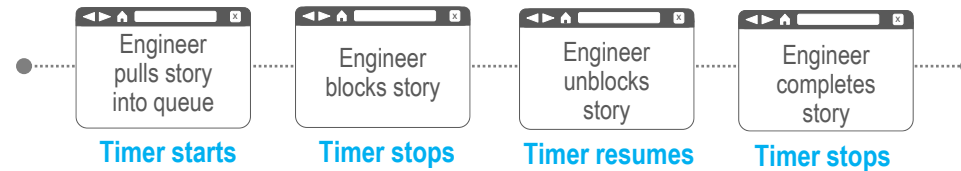
# The Regolink AgileCentral – CA PPM Connector & The Rego Action Item Responder



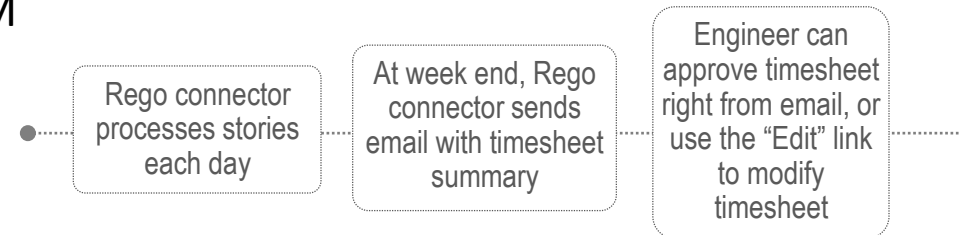
# Timesheets without timesheet entry

- One of our clients wanted a solution that created timesheets without their engineers having to fill out a timesheet
- We built a solution that acts similarly to a stopwatch

## Rally



## Clarity PPM





# Timesheet Email Sample

Personalized timesheets allow engineers to bypass PPM altogether by enabling One-Click Approvals of timesheets directly from their inbox.

Thu 12/21/2017 4:52 PM  
do-not-reply-ondemand@ca.com  
Timesheet: Michael Nachtigal [12/03/2017 - 12/09/2017]  
To: Leo D'souza

Dear Michael Nachtigal,

Please validate your timesheet below for the week of 12/03/2017 - 12/09/2017. If the time displayed is correct then select the **Approve** button below.  
select the **Edit** button below.

Investment	Phase	Task	Chargecode	Sun 12/03	Mon 12/04	Tue 12/05	Wed 12/06	Thu 12/07	Fri 12/08	Sat 12/09	Total
Vacation Time		Vacation 1 Scale document down			8.6						8.6
Training		Training	Regular								0
API Modernization 2017	F1870 - Buyer Pricing Service - Infra	Development / Implementation	Regular			4.3	4.3	2.55			11.15
API Modernization 2017	F1914 - /items API - Support pricebook scenario in Buyer Pricing Service	Development / Implementation	Regular			4.3	4.3	6.05	8.6		23.25
API Modernization 2017	F2262 - Buyer-pricing services infrastructure	Development / Implementation	Regular		0						0
<b>Total</b>				8.6	8.6	8.6	8.6	8.6		43	

**Approve** **Edit**

Clicking the Approve button will open a new email where you can enter Timesheet notes.  
Click send on that email to submit.

Thank you!  
CA PPM Admin

# Deciding factors

Factor	CA's OOTB connector	Rego's connector
If you just want to use OOTB functionality and avoid any additional services costs	✓	✗
If you don't have any needs to tailor the connector (see factors below) or are comfortable to remain within any constraints of the connector	✓	✗
If you do not want to switch timesheets for your entire population over to the new UX (use of this connector with timesheets requires that the entire population start using the new UX)	✗	✓
If you have added custom attributes to Agile Central that are required values, the OOTB connector may not work for you	✗	✓
If you need more control around what items get synchronized (i.e. hierarchy items, tasks vs phases, etc.)	✗	✓
If you need additional logic to control which stories can be capitalized or not without requiring manual intervention by a PM	✗	✓
If you want more control to place an item from AgileCentral into a particular WBS elements (i.e. "Development Phase" in CA PPM)	✗	✓
If you already have Initiatives created in AgileCentral that need to be mapped to CA PPM projects, you will need to use the Rego connector	✗	✓

# Questions?



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Let Rego be your guide.

# Thank You For Attending regoUniversity

## Instructions for PMI credits

- 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 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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