



*rego*University 2019

SAN DIEGO

Clarity – Agile Integration | Bi-Modal IT

Your Guides: Rob Greca and Karen Lifsey

Introductions

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



Agenda

- Agile Journey
- The Agile Players
 - Industry Leaders
 - Noise Makers
- Tools for Integrating
 - The Rego Way
- CA's OOTB Rally Connector
- Rego's Rally Connector
- Rego's Wagile Board

Part I: Agile Journey

Discuss where you are in your agile journey and the “why” for needed a connector.



Let Rego be your guide.

Where Are You In Agile Journey?

- What % of Your Organization is Agile?
 - <10%
 - 10-50%
 - 50-75%
 - >75%
- What Challenges Do You Face with Bi-Modal?
- How Many Have or Have Planned Agile Integrations?
 - Have? To What Tools?
 - Planned? To What Tools?

Why An Agile Integration?






















- KEY: Understand your business case
 - No integration will solve an undefined business case
 - Be prepared to make concessions
- For Those That Have or Plan Agile Integrations:
 - Why?
 - Do you want data for capitalization?
 - Do you want to monitor data for progress?
 - Do you want consolidated reporting?

Why – Capitalization

- At what level of detail do you want to capitalize time?
- Highest level – bucket task
 - Single, generic task per project
- Middle level – feature or story (Rego Recommended)
 - Time rolls up in your Agile tool to a feature or story. Import those as tasks
 - Strikes a good balance between getting required financial data and monitor at projects at a high level
- Lowest level – all tasks
 - As time is logged on Agile tasks, those are imported one-one.
 - Too much detail!

Why – Monitor Data Progress

- How healthy is my Agile project?

Project Sprint Hierarchy 						
Project / Spint / Story▲	Finish Date	Total Points	Points Complete	Points Remaining		% Complete
[-] Web Based Trading	11/22/16	98	48	50		49%
[-] Backlog	11/22/16	14	3	11		21%
[-] As a customer, the checkout process should be easy and must accept 3 forms of payment -- cash, credit, paypal	11/22/16	3	3	0		100%
[-] Create new user	11/22/16	3	0	3		0%
[-] Modify user rights	11/22/16	8	0	8		0%
[-] Sprint 1 (WBT)	9/30/16	55	26	29		47%
[-] A user needs to create a spider chart	9/30/16	5	0	5		0%
[-] A user needs to create column charts	9/30/16	5	5	0		100%
[-] As a user I would like to export reports	9/30/16	4	0	4		0%
[-] Change user rights	9/30/16	5	5	0		100%
[-] Create an option trade	9/30/16	3	3	0		100%
[-] Delete user	9/30/16	3	0	3		0%
[-] Make a stock trade	9/30/16	3	0	3		0%
[-] Modify a stock trade	9/30/16	5	5	0		100%
[-] Modify an option trade	9/30/16	3	3	0		100%
[-] Modify user	9/30/16	8	0	8		0%
[-] Recall a stock trade	9/30/16	3	0	3		0%
[-] Recall an option trade	9/30/16	5	5	0		100%
[-] Secure a new user	9/30/16	3	0	3		0%
[-] Sprint 2	10/14/16	29	19	10		66%

Why – Consolidated Reporting

- Consolidate data
- Use one system for status reports
- Leverage the power of Clarity to get the right data to the right people

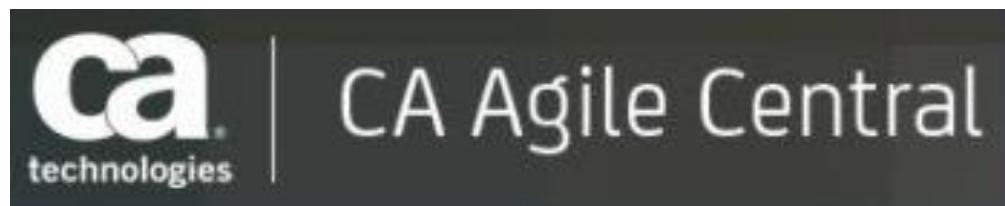
Part II: The Agile Players

Who are the Industry Leaders and Noise Makers?



Let Rego be your guide.

The Agile Players – Industry Leaders



Team Foundation Server

Rego has you covered!

The Agile Players – Noise Makers



servicenow

Part III: Tools for Integrating

Discuss the integration options and the Rego Way.



Let Rego be your guide.

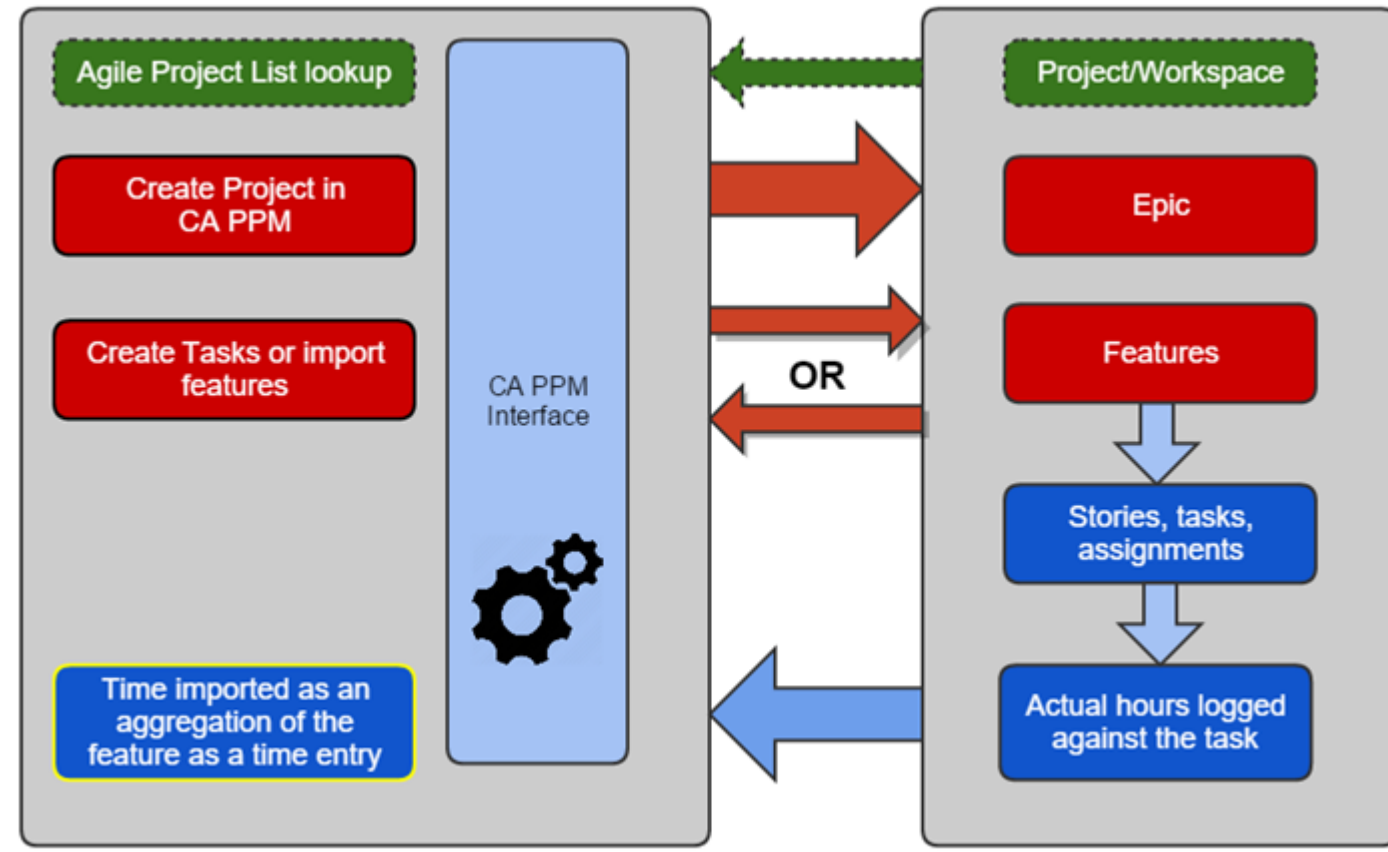
Tools for Integrating

Solution Type	Restrictions	Flexibility	Cost
Out of the box	Rally/CAAC	Low	Free
Middleware	Medium	Medium	Expensive
Point to point	Few	High	*Minor

- Cost is generically associated to knowing your business case.
- Any integration can spiral out of control

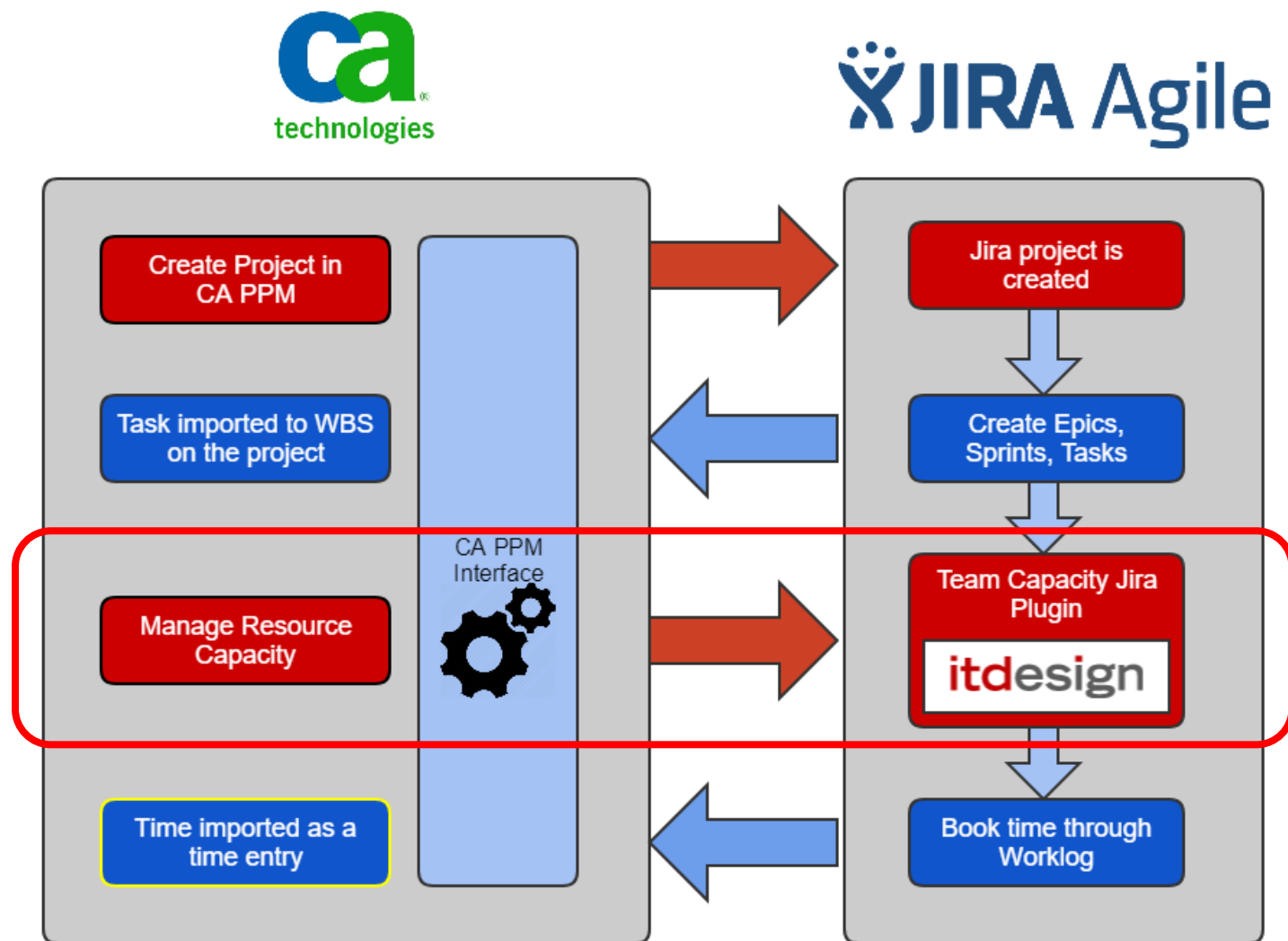
The Rego Way

- The Rego way is just one way
- Find your balance
- Tailor to your needs
- Establish
 - Business goal
 - Mapping
 - Triggers
 - Timing
- Reap the benefits of accurate data

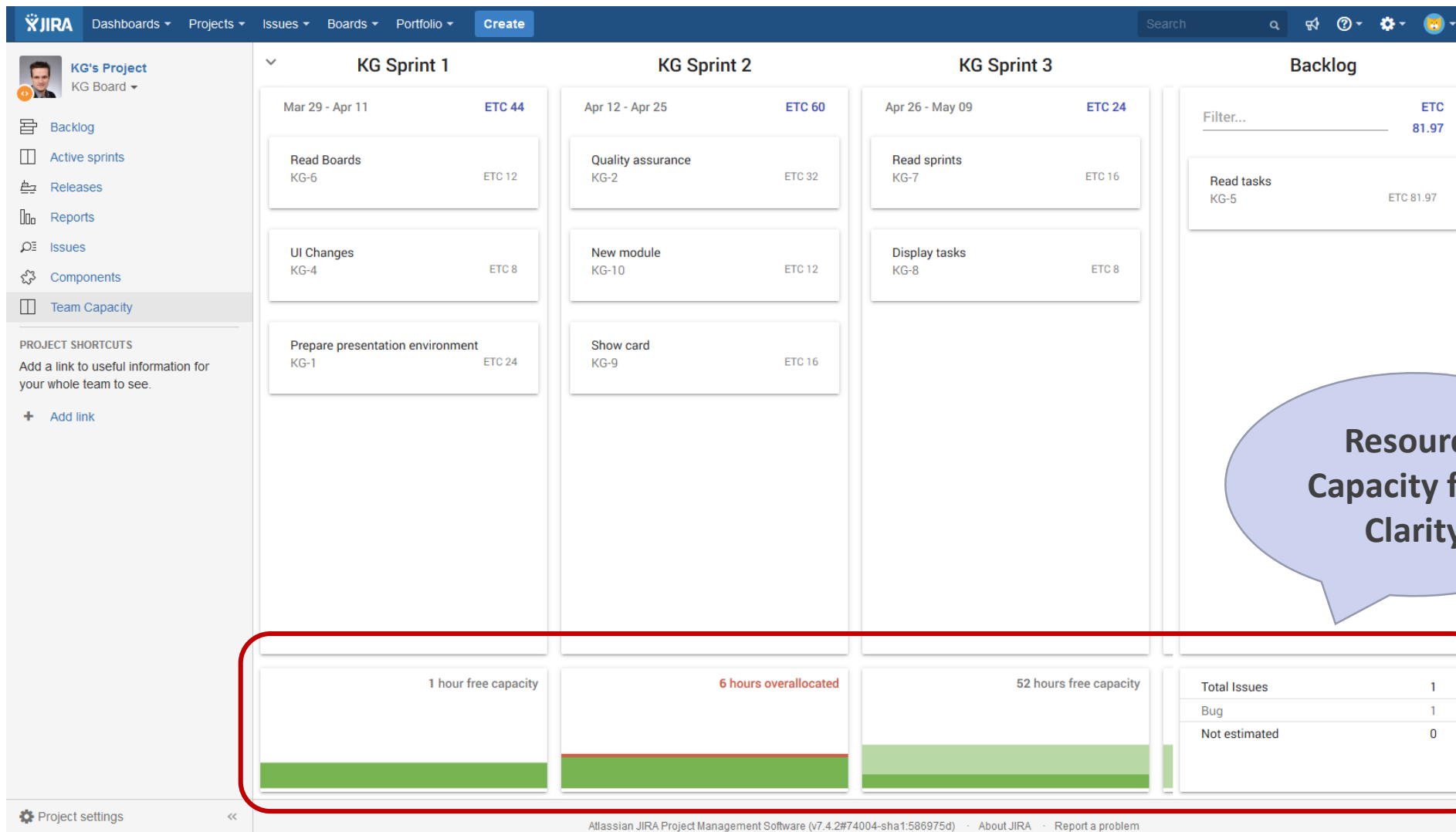


Rego + itdesign for Jira

- New Jira plugin
- Manage Resource capacity in Jira
- Use both the Rego and itdesign solutions for a complete integration.



Rego + itdesign for Jira



Part IV: CA's OOTB Rally Connector

Discuss the OOTB Rally Connector



Let Rego be your guide.

Agile Add-in

Content Add-Ins

Content Add-In Name

Status

Content Add-In ID

Version

Content Add-In Type

Filter

Show All

Clear

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

Upload Content Package

Integration Control - Federated Integration

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

One PPM and one Agile Central instance can use multiple control records, with different integration options.

Each project that integrates to Agile Central selects Control Record.

The integration for that project will use the rules defined in the Integration Control record it is linked to.

CA PPM
CA PPM Administrator Logout | Help | About

HOME | ADMINISTRATION | FAVORITES

Integrations

Filter: None

Integration Name:

Integration ID:

Active: All

Filter Show All Save Filter Clear

<input type="checkbox"/>	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	✓

Displaying 1 - 2 of 2

Save New

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)

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 the Agile Central 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"/>	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

Part V: Rego's Rally Connector

Discuss the Rego Rally Connector



Let Rego be your guide.

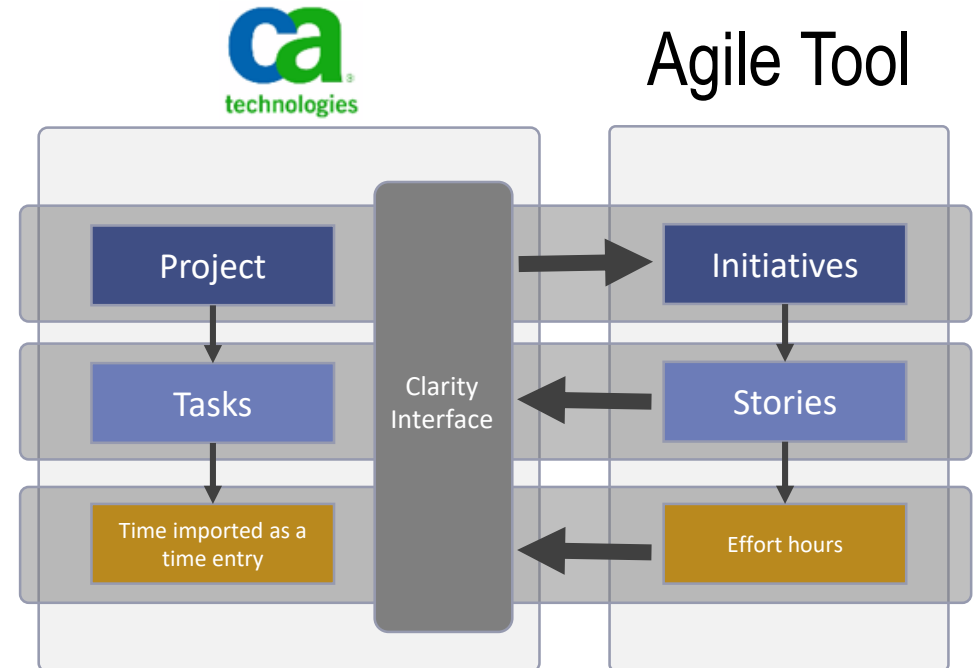
Rego's Agile Integration for Clarity

Our Clarity – 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 Clarity 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

Standard Rego Clarity – Agile connection
(but can be tailored)

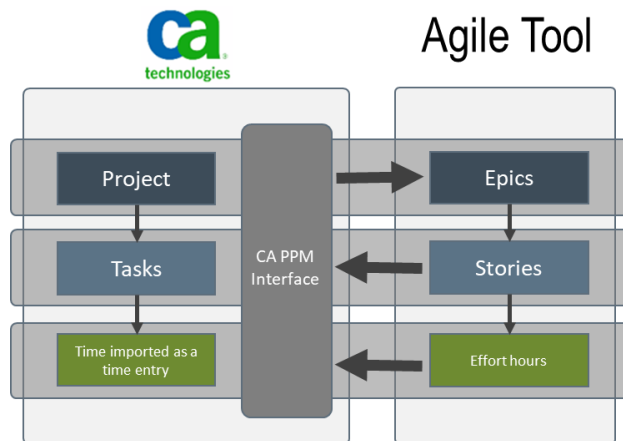


Our Experience with Agile Integrations

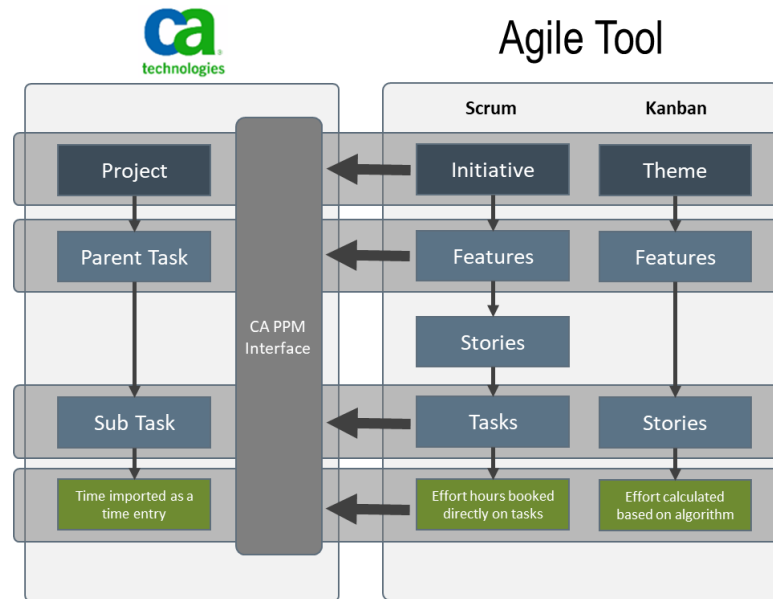


Our Experience runs the gamut of complexity

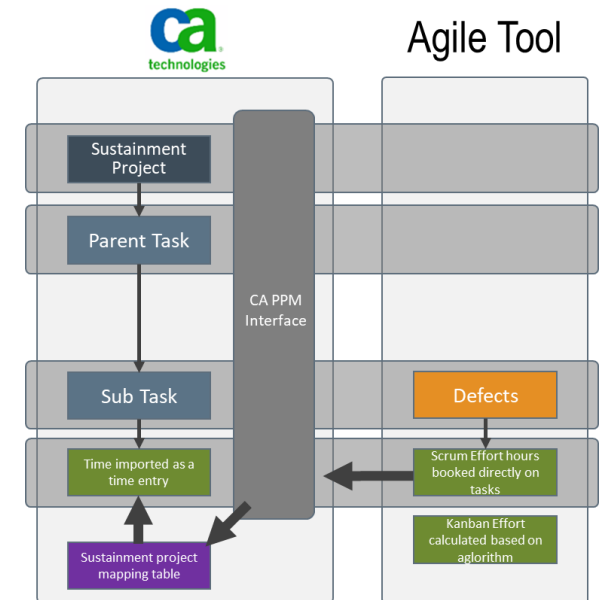
Standard PPM – Agile connection



Handling multiple Agile methods



Handling Defects



Rego's Agile Central connector vs CA's OOTB connector

CA's OOTB Agile Central integration

Pros	Cons
Comes out of the box	Requires that engineers start using Clarity timesheets which might be a new experience for engineers
Allows each project to choose the direction of the integration for the data for that project	You must switch on the new UX timesheets for everyone in order to use timetracking (the Clarity new UX timesheet is presented within Agile Central)
	Limited in what fields are mapped between applications – can't map custom fields in AC to Clarity

Rego's Agile Central 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 Clarity	
Can support any type of algorithm regarding deriving time such as tracking Kanban stories (similar to a timer, and doesn't require a user to enter actuals anywhere)	

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 have multiple Agile methods with different synchronization needs (i.e. Scrum vs Kanban)	✗	✓
If you need additional logic to control which stories can be capitalized or not without requiring manual intervention by a PM	✗	✓

Part VI: Rego's Wagile Board

Discuss the Rego Wagile Board



Let Rego be your guide.

Rally Wagile Board (Demo)

The Rego Wagile Board is a flexible, multi-dimensional Kanban-like experience for task management. The Wagile Board merges Agile and Waterfall features and offers functionality we don't have in the Modern UX task board, like custom fields and dependencies.

- Create multiple boards for a single project
- Create new tasks and stories
- Configure card layout and views
- Templatize, streamline, and drag & drop
- See Parent Tasks and Dependencies (Epic > Story > Tasks)
- @mention your team in task card conversations

The image displays two screenshots of the Rally Wagile Board interface. The top screenshot shows a 'Tasks By Workshop' board with four columns representing different workshops. The bottom screenshot shows a 'Story Board' with two columns: 'Completed' and 'Not Started'. A conversation window is overlaid on the right side of the bottom screenshot.

Tasks By Workshop Board:

Workshop	Task Name	% Complete	Finish Date
Workshop 1	Finance Tech Debt	100.00%	09/21/18
	SqLServer Support	0.00%	09/26/18
	Functional and Technic...	0.00%	09/21/18
	Database Development	1.00%	09/26/18
Workshop 2	Migrate Reports	0.00%	08/28/18
	Add Gateway object	0.00%	12/04/18
Workshop 3	Deployment and Quality...	100.00%	11/09/18
	Operational improve...	0.00%	11/26/18
Workshop 5	Planning Phase	100.00%	08/28/18
	Time Tracking portlet	0.00%	02/18/19

Story Board:

Sprint	Task Name	Parent	Task Owner	Priority	Duration
Sprint 1	Simplify Issue processing	Taunya's awesome Epic	Zellner, Josef	10.00	0.00
	Financial Transparenc...	Taunya's awesome Epic	Turner, Bruce	10.00	15.00
	Technical Debt	Taunya's awesome Epic	Walker, Terry	10.00	0.00
Sprint 2	Time Tracking	Taunya's awesome Epic	Pendulkar, Sachin	10.00	0.00
	Scheduling enhancements	Taunya's awesome Epic	Thompson, Peter	10.00	90.00
	Keep the Lights on	Taunya's awesome Epic	Training, Admin	10.00	1.00

Conversation Window:

Conversation of 'Simplify Issue processing'

- BK [Redacted]
- Kate, Berks - 03/07/19, 12:51 AM: Please look
- Kate, Berks - 01/08/19, 11:51 PM: Jason Berry take a look?

Questions?



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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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