



regoUniversity 2019

SAN DIEGO

Excel and Clarity PPM | Working Together

Your Guides: Emma Terzian and Josh Leone

Introduction



Let Rego be your guide.

Agenda

- Excel: Enemy or Friend?
- Integration Methods
- Guardrails
- Excel / Clarity Use Cases
- Summary



Excel: Enemy or Friend?

- Where do users leverage Excel?
- Why are they using Excel?
- How does this hurt Clarity?
- How does this help Clarity?
- Will a proclamation to use Clarity 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 Clarity 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 Clarity
 - Launch integration from Excel
 - Upload file to server
 - Attach file to object
 - Attach file to a custom upload object
- Pulling data from Clarity
 - Initiate from Clarity
 - Initiate from Excel



- How do your users use Excel along side Clarity?
- What type of integrations would you like to see between Excel and Clarity PPM?
- Have you been able to get users to stop using 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 Clarity?
- How do you prevent users from changing the Excel template?
- How do you push new templates to users when changes are needed?

Excel/Clarity Use Case #1: Excel Data Manager

Mass Update CA PPM Data in 4 Steps

The screenshot displays the PPMExcelInterface Excel spreadsheet, which is used for mass updating CA PPM data. The interface includes a ribbon with tabs for FORMULAS, DATA, REVIEW, VIEW, and ACROBAT. The spreadsheet contains a table with columns for Project Name, Status, Active, In Progress, and various dates. The process is outlined in four steps:

- 1 Get Data**: Select one of the pre-loaded interfaces. (Indicated by a blue circle with a 'Get' icon and a list of categories on the left sidebar.)
- 2&3 Modify & Validate**: Using Excel's click & drag and cut & paste functionality. (Indicated by a blue circle with a magnifying glass icon over the 'Validate' button.)
- 4 Load Data**: Send the modified data back to the source system with a single click. (Indicated by a blue circle with a 'Load' icon over the 'Load Data' button.)

- DEMO
- Free trial
- Standard edition for admins
- Enterprise Edition for bulk editing massive data

Excel/Clarity Use Case #2: 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 Clarity to create cost plan
- Future State
 - Use the Excel Data Manager

Excel/Clarity Use Case #3: Universal Import

- Import any data from CSV or Excel
- Chain import actions together
- Attach data manually or build a fully automated interface
- Verbose error trapping and conditional processing

Properties Processes

Data Processor: Transaction Interface | Data Action: Import File Data - File Data Import - Properties

General

ID DPA000045

Name Import File Data

Action Type File Data Import

Sort Order 100.00

Is Active ☒

Commit ☒

Print Results to Console ☒

Allow Exception ☐

Break after Completion ☐

Description Find file(s) to process, and import their data into a staging object.

Staging Object

Staging Object Name Transaction Staging

Staging Object ID rego_trans_staging

Field Prefix rego_

Import Type Unique Batch

File

File Path C:\Users\ldmatz\Documents\General\Data Processor\Transaction Interface

File Name Prefix Transactions

File Prefix Option Starts With

File Extension .dat

File Date Stamp Format

Compressed File(s) ☐

File(s) To Process All Files

File Already Processed Skip File

File Delimiter

File First Data Row 1

Data Embedded Character

Null Placeholder

Import Error Options Stop Importing - Rollback

Fail if No Files Found ☐

Fail on Zero Imports ☐

File Archive Directory

Delete File(s) [--Select--]

Save Save And Return Return

☒ = Required ☒ = Enter Once ☒ = Unique

Excel/Clarity 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)

Open Mic

- Do you see value in the Excel Uploaders?
- What type of data would you want to upload?

Clarity OOTB Excel Integration

- Export to Excel
 - Exports the data on the screen
 - Mimics the data and column structures
 - Limited to 300 records
- Export to Excel (data only)
 - Raw data export from a grid page
 - The data can be parsed as CSV
 - Limited to 25k records
- New UX Grids Compatible with Excel Copy and Paste
 - Resource Allocations
 - Cost Plans
 - Budget Plans (copy from)

Rego Excel Integration Plans

- Excel Data Manager
 - Standardized asset for all data management in Excel
- SQL Extracts
 - Single asset for extracting data to CSV and Excel files
 - Can email out files or drop to a file location
- Universal Importer
 - Single asset for importing all data from CSV and Excel
 - Can attach file and import from a file location

Summary

- Forcing community to use CA Clarity 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

Questions?



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Thank You For Attending regoUniversity

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- 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!
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Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com