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Excel and Clarity PPM | Working Together

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Introduction

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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?

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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
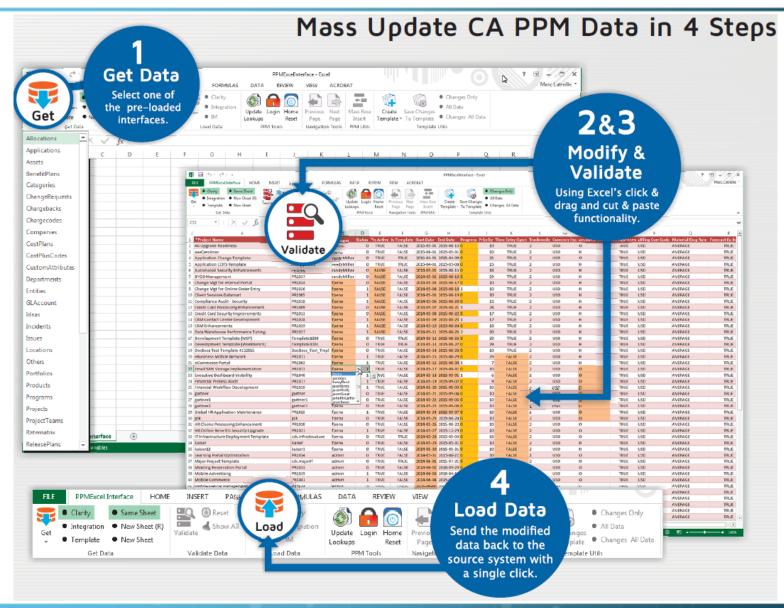
Open Mic

- 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?

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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?

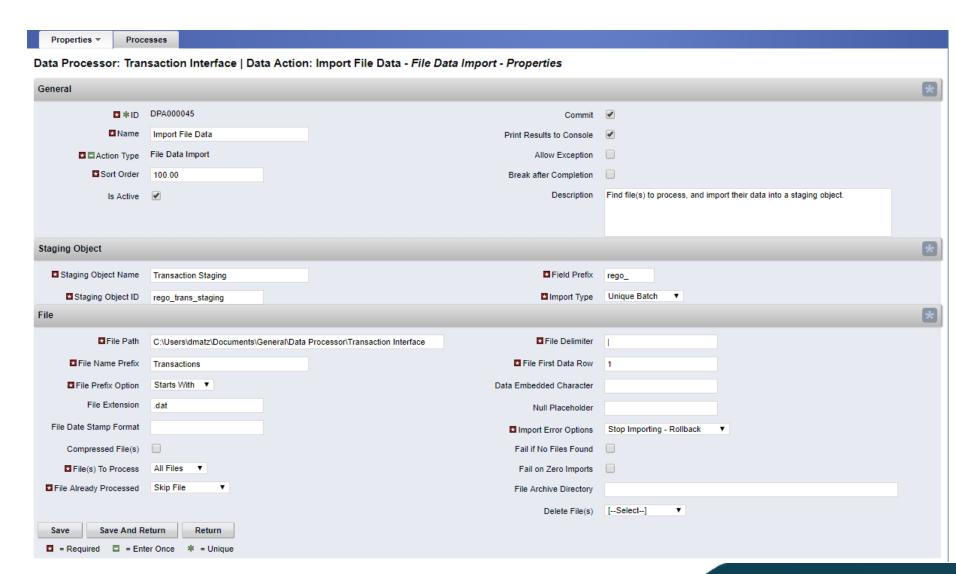# Excel/Clarity Use Case #1: Excel Data Manager

- 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

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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?

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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

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Questions?

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Let us know how we can improve!
Don't forget to fill out the class survey.

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