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Getting More Value from SharePoint in PPM

Your Guides: Tom Santos and Luis Palacios

Introductions

- Meet your guides

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

Agenda

- What is SharePoint

- Office 365 and PPM

- RegoLink Flow Connector

- Common Use Cases

- Demo

- Q&A

What is SharePoint

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What is SharePoint?

- Highly customizable offering from Microsoft which allows your organization to easily create sites.

- Interacting with SharePoint sites allows users to:
  - Store, Organize, Share and Access Information and Files for an immersive Collaboration Experience
  - Manage Content via Document Libraries, Lists, and Applications

- Commonly used for Collaboration, Knowledge Store, Document Repository and even Org Wide Intranets

- Divided in two main offering:
  - **SharePoint Online:** Cloud based service, for all business sizes. With seamless infrastructure over head.
  - **SharePoint Server:** On-Premise version, similar to SharePoint Online, exposing the latest features and capabilities.

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Office 365 and Clarity

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Office 365 and PPM

- SharePoint and Office 365 are king in communication and collaboration vs most PPM solutions
- Not all PPM Applications allow for:
  - Seamless integrations to existing systems
  - Have the same robustness for collaboration and communication
  - Used organization-wide, they are normally restricted to a subset of users or managers.
- Collaboration and Communication are key to PPM and Organizations:
  - Skype
  - MS Teams
  - SharePoint
  - One Drive
  - Outlook
- Today's User Community can be remote and distributed, requiring mobility. Work anywhere approach:
  - Office Suite
  - Sway
- PPM for all sizes
  - To-Do: Basic check list and task management
  - Planner: Robust Board like approach
  - Project Online: Full blown PPM capabilities
- Business Management
  - Automation and Application Development via PowerApps and Flow
  - Advanced AI Features in PowerApps, and reporting via Power BI
  - Dynamics for Business Management

RegoLink Flow Connector & Document Manager

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What is it?

- Microsoft Flow based connector, certified by Microsoft. Which allows organizations:
    - Easily integrate Clarity PPM with the Office 365 ecosystem and over 500 connectors
    - Allows you to synchronize data bi-directionally with Clarity PPM using Rego's proprietary RegoLink API
    - Integrates with Clarity's Process Engine, and can easily be automated:
        - When an instance is created in PPM or a condition is met.
        - With Office 365 interactions like:
            - creating SharePoint sites
            - Interact with SharePoint lists
            - When a communication is received or to create them (MS Teams, Outlook, Calendar)
            - Synchronize data in real time
        - Allows to validate any operation and easily take action, allowing error handling and conditions
- The RegoLink connector is a Premium connector and requires either Flow Plan 1 or Plan 2 license to use.

Document Management

What It Does…	- Fully integrate Clarity with SharePoint, once a Project has a SharePoint Site or Microsoft Team created using our Flow Connector, a Portlet can be used to navigate files and folders inside of Clarity
	- The Portlet includes functionality to:
	    - Navigate all Document Libraries related to the Site
	    - Interact with files (View Online, Download, Delete, Upload)
	    - Navigate Folders and/or Create New Folders

- Supports new UX and classic
- Granular rights management via SharePoint

Common Use Cases

Let Rego be your guide.

SharePoint – Populate List

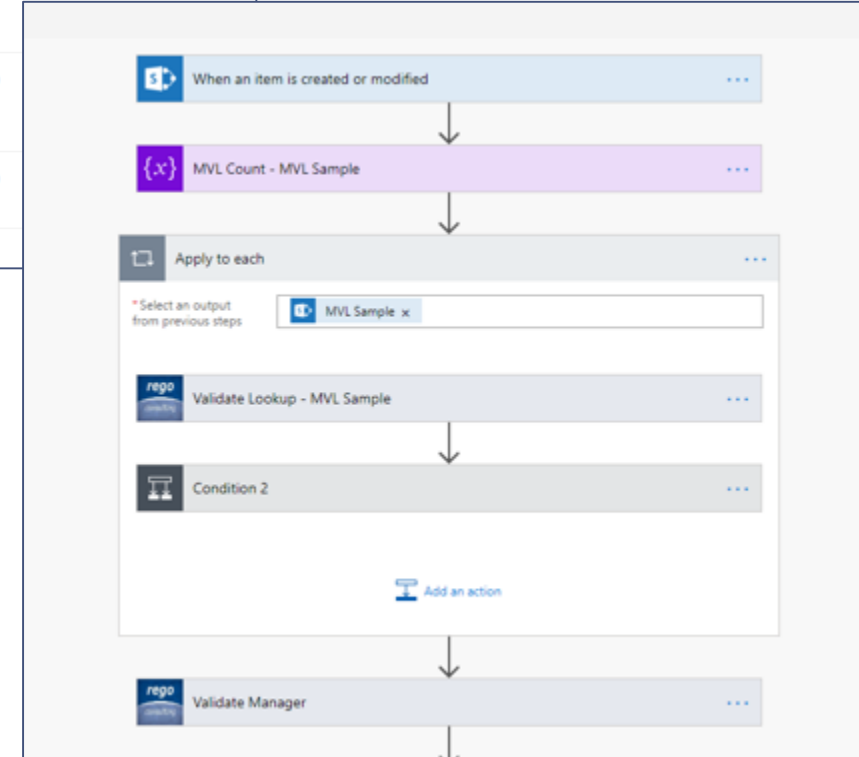| When Does It Start...	When an instance is modified in Clarity Or on a predefined schedule

What It Does...	- Admins can define which fields and actions will trigger the flow.
	- When triggered one or more instances can be sent to Flow. i.e.:
	  - Modified Projects
	  - Newly created instances like resources
	- Once data is received, it will update a SharePoint list by adding or updating existing records
	- This is great to implement, when:
	  - You are using a list to store choice values
	  - Store data in a list, to then build charts, additional webparts or views

Populate List – Cont.

NEEDS SOMETHING IN HERE

Clarity – Populate Idea

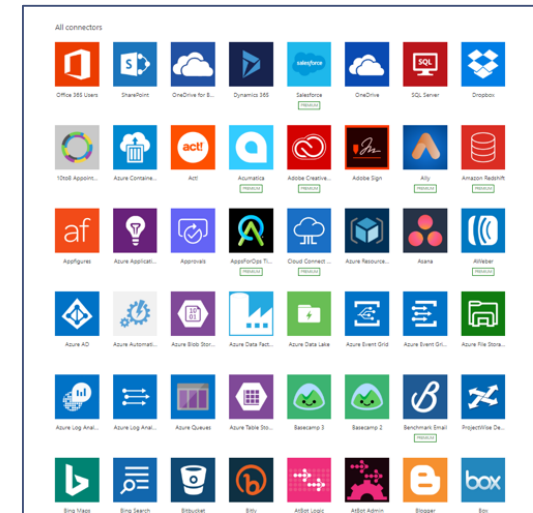| When Does It Start…	When an Idea is entered in SharePoint

What It Does…	- When idea is entered into SharePoint and meets a qualifying state
	  - Send to Clarity an idea
	  - Send to Clarity as a project
	- Update the status of the idea or project in Clarity
	  - Send a corresponding update back to SharePoint to update the entry

Update Clarity On Item Update or Creation

When Does It Start...	When a SharePoint List Item is Created, Modified or Deleted

What It Does...	- When a List Item is modified it will trigger the flow. Admins will be able to specify the mappings between SharePoint List and the Action in Clarity
	- This flows allow for transformation and validation of data to ensure mappings are valid
	- Admins will be able to add approvals or notifications throughout the flow before updating Clarity
	- Clarity response can be actioned on to trigger notifications or actions on success or failure
	- Great for:
	  - Bi-directional lists
	  - Intake forms like Idea Intake and Approval

Additional Use Cases

Use Case	Description
Project Site Creation	Automatically create a SharePoint site when an investment is created or meets a criteria. The flow can easily: - Sync permissions - Select a template and location of the site
MS Teams	Automatically create an MS Team or a Channel per investment, when the investment is created or meets a criteria. PPM can also read or post emails to a MS Team
Email Eaters	Easily parse emails, and update PPM accordingly. Useful to create risks, issues, or approve action items via email.

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Demo
Enhancing Collaboration with SharePoint

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Demo

- Walkthrough Flow UI
- Walkthrough the PPM Objects (Webhooks and Actions)
- Trigger and walkthrough the flow:
  - Create Project
  - SharePoint Site
  - Document Manager

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Demo
Milestone Calendar Sync

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Demo

- Create NSQL Query
- Create Flow:
  - Trigger on button (mobile phones included)
  - Fetch query results, and validate records are returned
  - Notify if no records
  - Add events to my calendar
- Execution
  - Create Project
  - Create Milestones
  - Trigger Flow

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Query

select

@SELECT:DIM:USER_DEF:IMPLIED:RESOURCE:tsk.prid:task_prid@,

@SELECT:DIM_PROP:USER_DEF:IMPLIED:RESOURCE:tsk.prname:task_name@,

@SELECT:DIM_PROP:USER_DEF:IMPLIED:RESOURCE:to_char(tsk.prstart, 'yyyy-mm-dd'):task_start_date@

from prtask tsk

inner join inv_investments inv on inv.id = tsk.prprojectid

where

prismilestone = 1

and @WHERE:SECURITY:PROJECT:inv.id@

and inv.code = @WHERE:PARAM:USER_DEF:STRING:project_code@

and @FILTER@

Flow Mappings

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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!
Don't forget to fill out the class survey.

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