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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.

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

The screenshot shows the Clarity PPM interface for 'Rego Test Project Level 4'. The 'RegoLink Document Manager' portlet is active, showing a document library with a dropdown menu set to 'Documents'. Below the dropdown are buttons for '+ New Folder', 'Upload File(s)', 'Delete File(s)', 'Open in SharePoint', and 'Refresh'. A table of documents is displayed with columns for Name, Owner, Modified By, and Last Modified. Two callout boxes are overlaid on the interface: one pointing to the 'Open in SharePoint' button with the text 'Open SharePoint directly. (Sync documents to your desktop)' and another pointing to the 'Upload File(s)' button with the text 'Upload or drag and drop'.

Name	Owner	Modified By	Last Modified
1. Project Charter	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
2. Business Case	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
3. Project Management	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
4. Product Build Decisions	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
5. Gate Reviews	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
6. Design Engineering	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
7. Manufacturing	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
8. Order Entry	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
9. Lab & Reliability	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
10. Controls	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
11. Product Costing	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28

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

Common Use Cases

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SharePoint – Populate List

When Does It Start...	When an instance is modified in Clarity Or on a predefined schedule
What It Does...	<ul style="list-style-type: none">- Admins can define which fields and actions will trigger the flow.- When triggered one or more instances can be sent to Flow. i.e.:<ul style="list-style-type: none">- 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:<ul style="list-style-type: none">- You are using a list to store choice values- Store data in a list, to then build charts, additional webparts or views

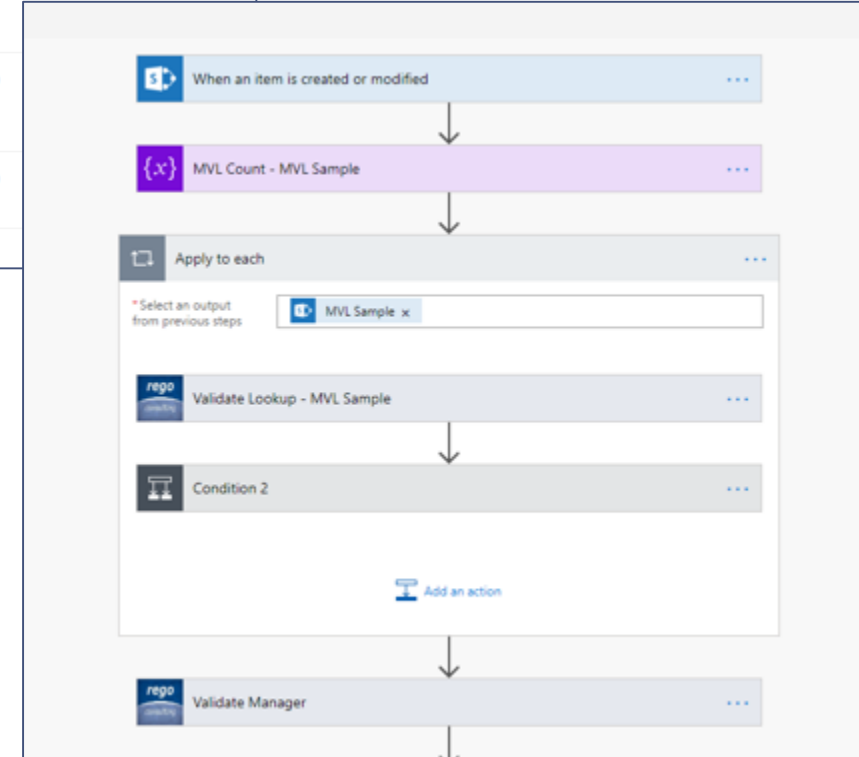
Populate List – Cont.

+ New Quick edit Export to Excel Flow PowerApps ...

CA PPM Projects

Title	Project Code	Description	Manager	Start	Finish	Active
My First Project Demo 2	PRJ0102042019	My First Project Demo 2	Luis Enrique Palacios	2/4/2019	2/9/2019	Yes
My First Failed Project	PRJ0202042019	My First Failed Project	Adriana Ramos	2/4/2019	2/23/2019	
My New Demo Project	PRJDEMO001	My New Demo Project	Luis Enrique Palacios	2/5/2019	2/23/2019	

NEEDS SOMETHING IN HERE



Clarity – Populate Idea

When Does It Start...	When an Idea is entered in SharePoint
What It Does...	<ul style="list-style-type: none">- When idea is entered into SharePoint and meets a qualifying state<ul style="list-style-type: none">- Send to Clarity an idea- Send to Clarity as a project- Update the status of the idea or project in Clarity<ul style="list-style-type: none">- Send a corresponding update back to SharePoint to update the entry

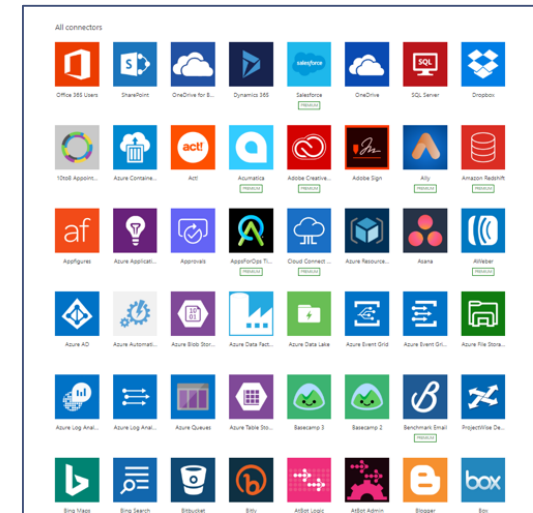
Update Clarity On Item Update or Creation

When Does It Start...	When a SharePoint List Item is Created, Modified or Deleted
What It Does...	<ul style="list-style-type: none">- 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:<ul style="list-style-type: none">- Bi-directional lists- Intake forms like Idea Intake and Approval

Additional Use Cases

Use Case	Description
Project Site Creation	<p>Automatically create a SharePoint site when an investment is created or meets a criteria.</p> <p>The flow can easily:</p> <ul style="list-style-type: none"> - Sync permissions - Select a template and location of the site
MS Teams	<p>Automatically create an MS Team or a Channel per investment, when the investment is created or meets a criteria.</p> <p>PPM can also read or post emails to a MS Team</p>
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

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

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

Get Tasks (Preview)

* Queries: RegoLink Flow - Project Tasks Calendar

param_project_code: Project code

Operation: Equals

Show advanced options

Create Task in Calendar

* Calendar id: Calendar

* Subject: Project Name - task_name

* Start time: formatDateTime(...)

* End time: formatDateTime(...)

Show advanced options

Add an expression to do basic things like access, convert, and compare values. [Learn more](#) Hide

Dynamic content **Expression**

```
formatDateTime(variables('Start date'))
```

Update

String functions See more

concat(text_1, text_2?, ...)
Combines any number of strings together

Questions?



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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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