

# CA PPM – Agile Integration Bi-Modal IT

Your Guides: Rob Greca, Doug Greer and Josh Leone

# Introductions

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



# 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?

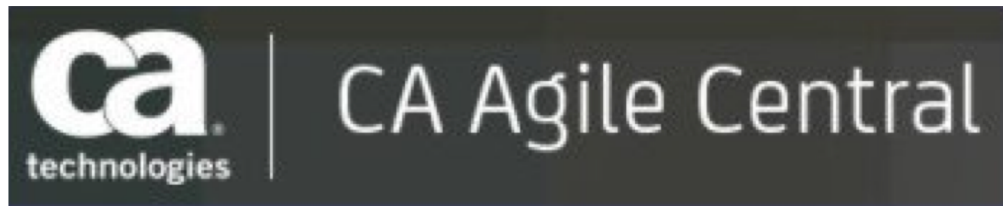
Project Sprint Hierarchy 						
Project / Sprint / Story ▲	Finish Date	Total Points	Points Complete	Points Remaining		% Complete
Web Based Trading	11/22/16	98	48	50		49%
Backlog	11/22/16	14	3	11		21%
As a customer, the checkout process should be easy and must accept 3 forms of payment -- cash, credit, 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 CA PPM to get the right data to the right people



# The Agile Players – Industry Leaders



Rego has you covered!

# The Agile Players – Noise Makers

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service**now**

# Tools for Integrating

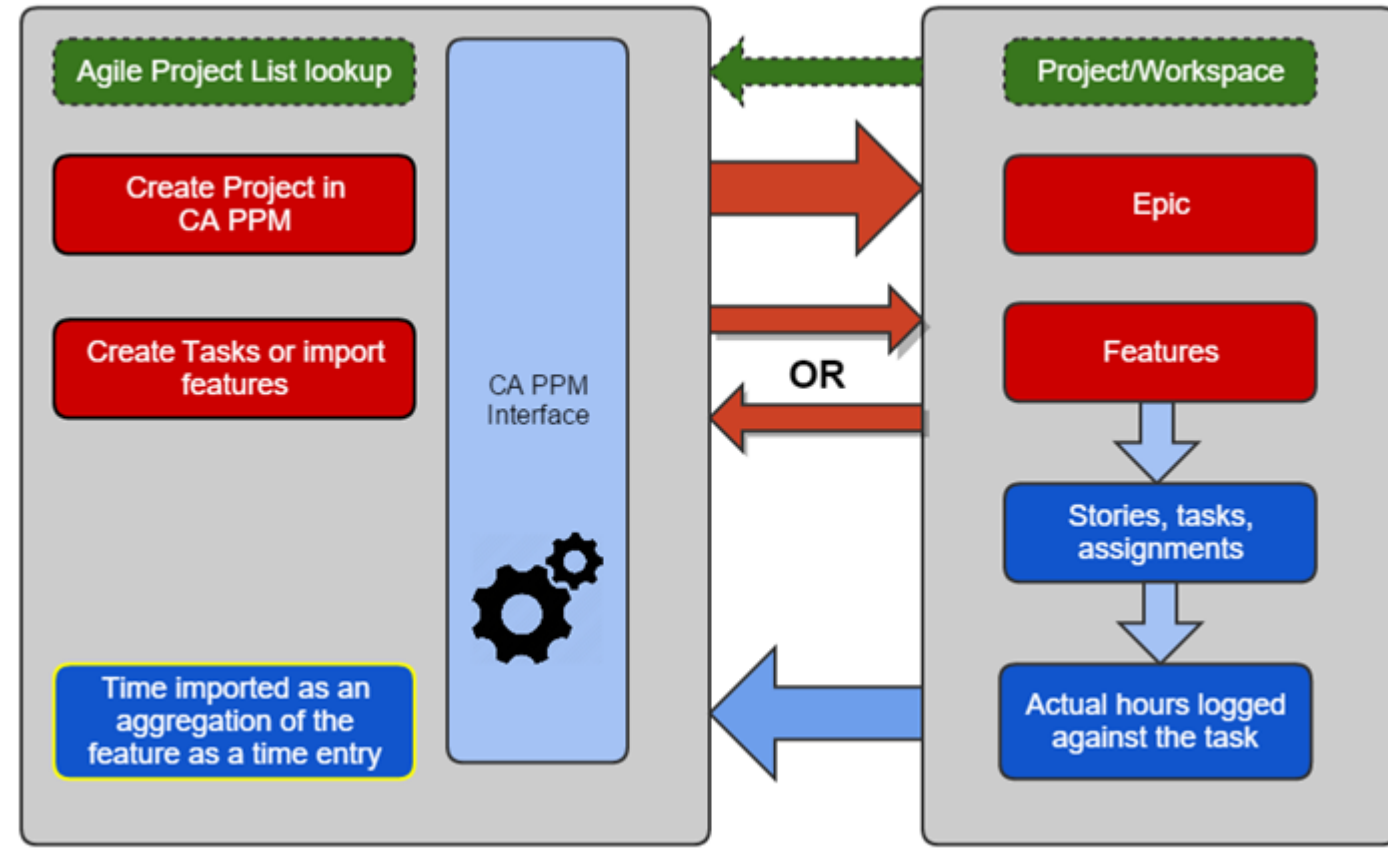
Solution Type	Restrictions	Flexibility	Cost
Out of the box	Rally/CAAC	Low	Free
Middleware	Medium	Medium	Expensive
Point to point	Few	High	*Minor

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



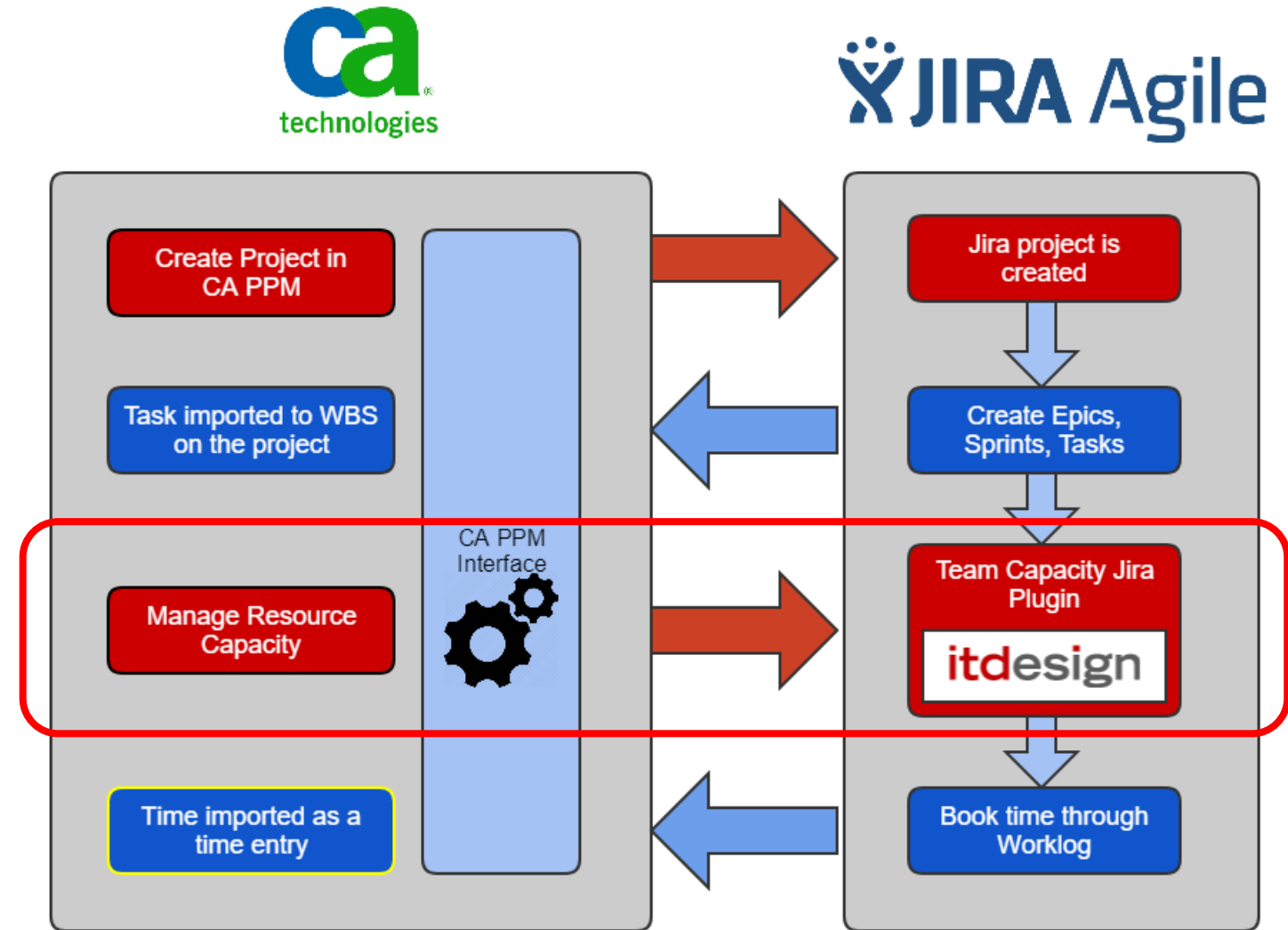
# The Rego Way

- 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

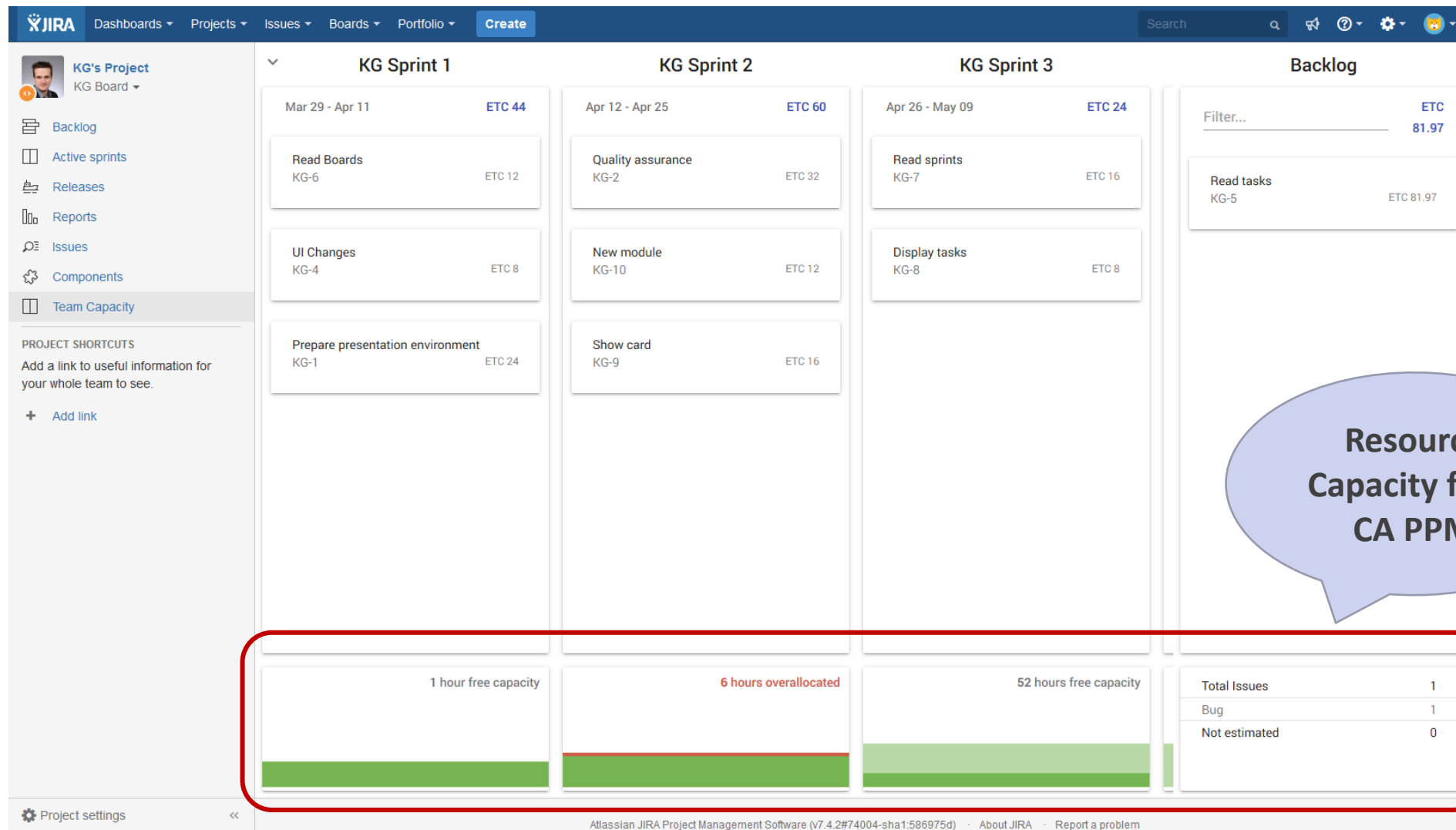


# Rego + itdesign for Jira

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



# Rego + itdesign for Jira





# CA's OOTB Agile Central Connector

# Agile Add-in

Content Add-Ins

Content Add-In Name

Content Add-In ID

Content Add-In Type

Content Add-In

Status





All

Version

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.

The screenshot shows the CA PPM Administrator interface. The top navigation bar includes the CA PPM logo, the user role 'CA PPM Administrator', and links for 'Logout', 'Help', and 'About'. Below the navigation bar, the 'Integrations' page is displayed. It features a search filter section with 'Filter: None', input fields for 'Integration Name' and 'Integration ID', and an 'Active' dropdown set to 'All'. Below these are buttons for 'Filter', 'Show All', 'Save Filter', and 'Clear'. The main content area is a table with columns: 'Integration Name', 'Integration ID', 'Integration URL', and 'Active'. It lists two integrations: 'Agile Central to PPM' (AGL0001) and 'PPM to Agile Central' (AGL0002), both with URLs pointing to 'https://rally1.rallydev.com' and marked as 'Active' with yellow checkmarks. At the bottom right of the table, it says 'Displaying 1 - 2 of 2'. Below the table are 'Save' and 'New' buttons.

Integration Name	Integration ID	Integration URL	Active
Agile Central to PPM	AGL0001	https://rally1.rallydev.com	✓
PPM to Agile Central	AGL0002	https://rally1.rallydev.com	✓



# 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 )  
PPM to Agile Central

**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

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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

# Rego's Agile Central Connector

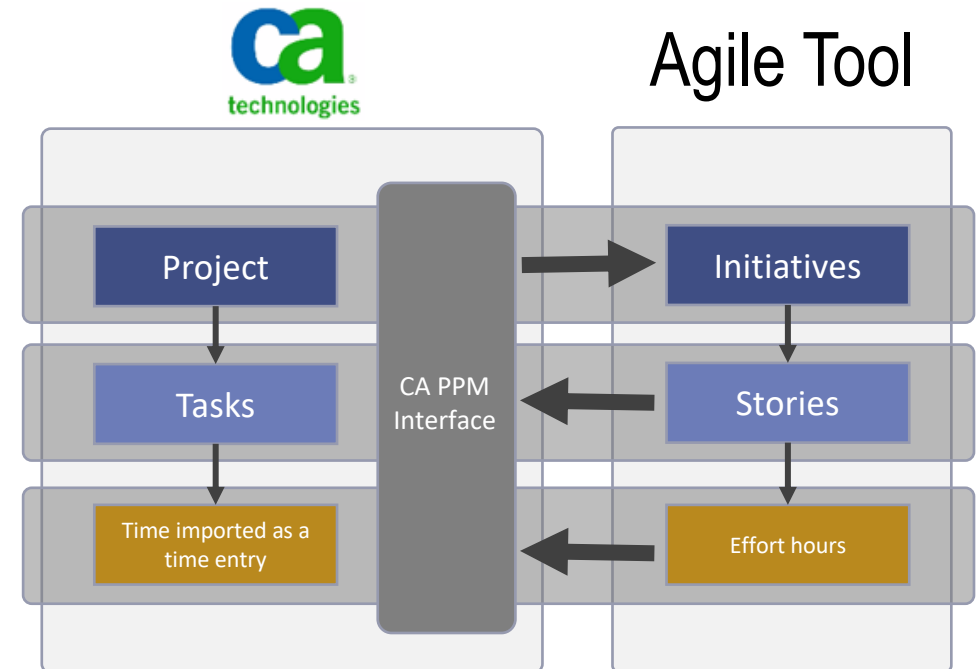
# Rego's Agile Integration for CA PPM

Our CA PPM – 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 CA PPM 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 CA PPM – Agile connection  
(but can be tailored)



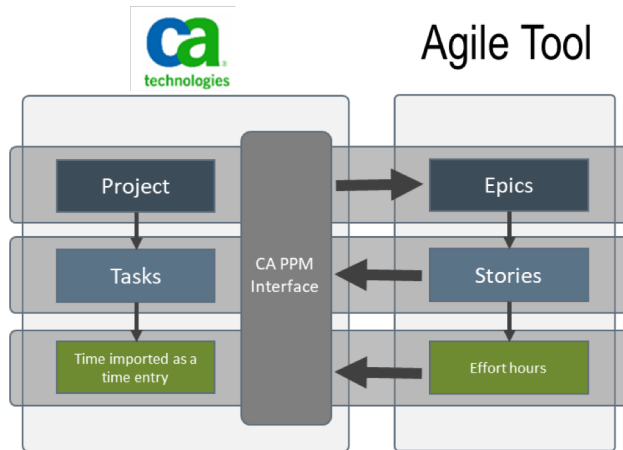
# Our Experience with Agile Integrations



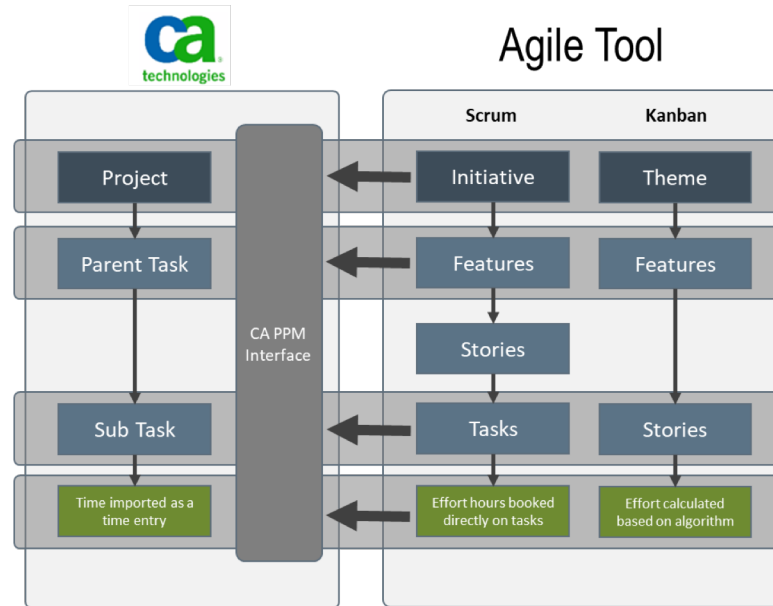


# Our Experience runs the gamut of complexity

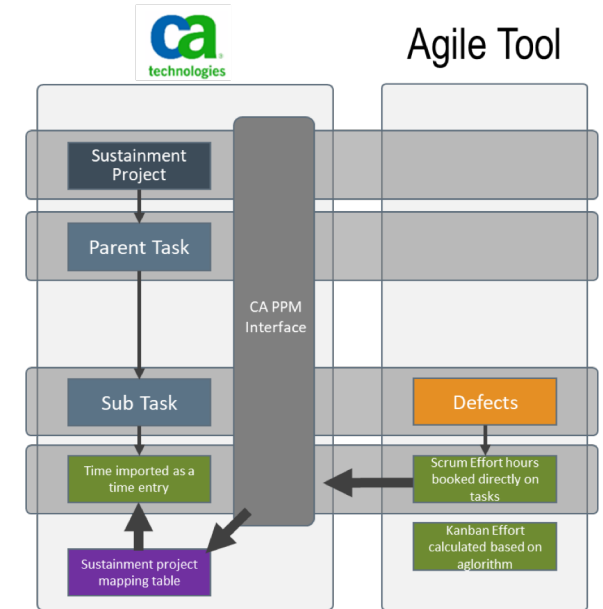
Standard PPM – Agile connection



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 CA PPM 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 CA PPM new UX timesheet is presented within Agile Central)
	Limited in what fields are mapped between applications – can't map custom fields in AC to CA PPM

## 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 CA PPM	
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	✗	✓

# Questions?



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Let Rego be your guide.

# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at [pmi.org](http://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.



### Phone

888.813.0444



### Email

[info@regouniversity.com](mailto:info@regouniversity.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)