

CA PPM Integrations | Most Common

Your Guides: Rob Greca and Wes McCoubrie

Introductions

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



Agenda

- Why Integrate?
- Integration Guardrails
- Integration Basics
 - Schedule
 - Design
 - Error Handling & Testing
- Most Popular Integrations
- Q&A with Mike Lavengood

Introduction

What integrations are the most requested and the most utilized?

This class will review the most common interfaces to and from CA PPM, including best practice use cases and lessons learned from real implementations.

Open Mic: Why Integrate?

- What has been the primary driver for integration in your environment?

Why Integrate?

- Eliminate administrative activities
- Eliminate double entry
- Introduce data consistency
- Accommodate trend towards diverse application ecosystem
- Facilitate business process
- Reduce license costs
- Enhance reporting
- The stereotype associated with developing an integration needs to be debunked.
- 10 years ago, integrations were very expensive and technically challenging. Now, with improved integration technology and frequency, integrations are much more cost effective.
- \$4-8K is the cost of a typical Rego integration

Integration Guardrails

- Who should be the source?
 - CA PPM should NOT be the source of all truth
 - CA PPM is a decision making tool
 - It needs the information to make decisions, but not necessarily the source
- Is the process mature?
 - Integrations are built to match process
 - You must detail the process and the flow of information
 - You must have a solid repeatable process and be able to identify programmatically the exceptions
- Don't over-integrate.
 - Weigh the cost (one-time and ongoing) vs. benefit of each integration opportunity
 - Understand the accuracy of the source data
 - Identify the key integration points and invest in doing it correctly

When Should An Interface Run?

- Event based
 - This type of Interface is triggered by event in the system (something got created or updated or deleted)
- Batch
 - This type of interface is scheduled and triggered at a set time (nightly or at certain interval, etc.)
 - Since, batch interfaces will handle multiple instances, you want to address transaction managements (what happens when a record fails – one fail, all fail?)
- Manual
 - This type of Interface is manually started by the user when they are ready for data transmittal

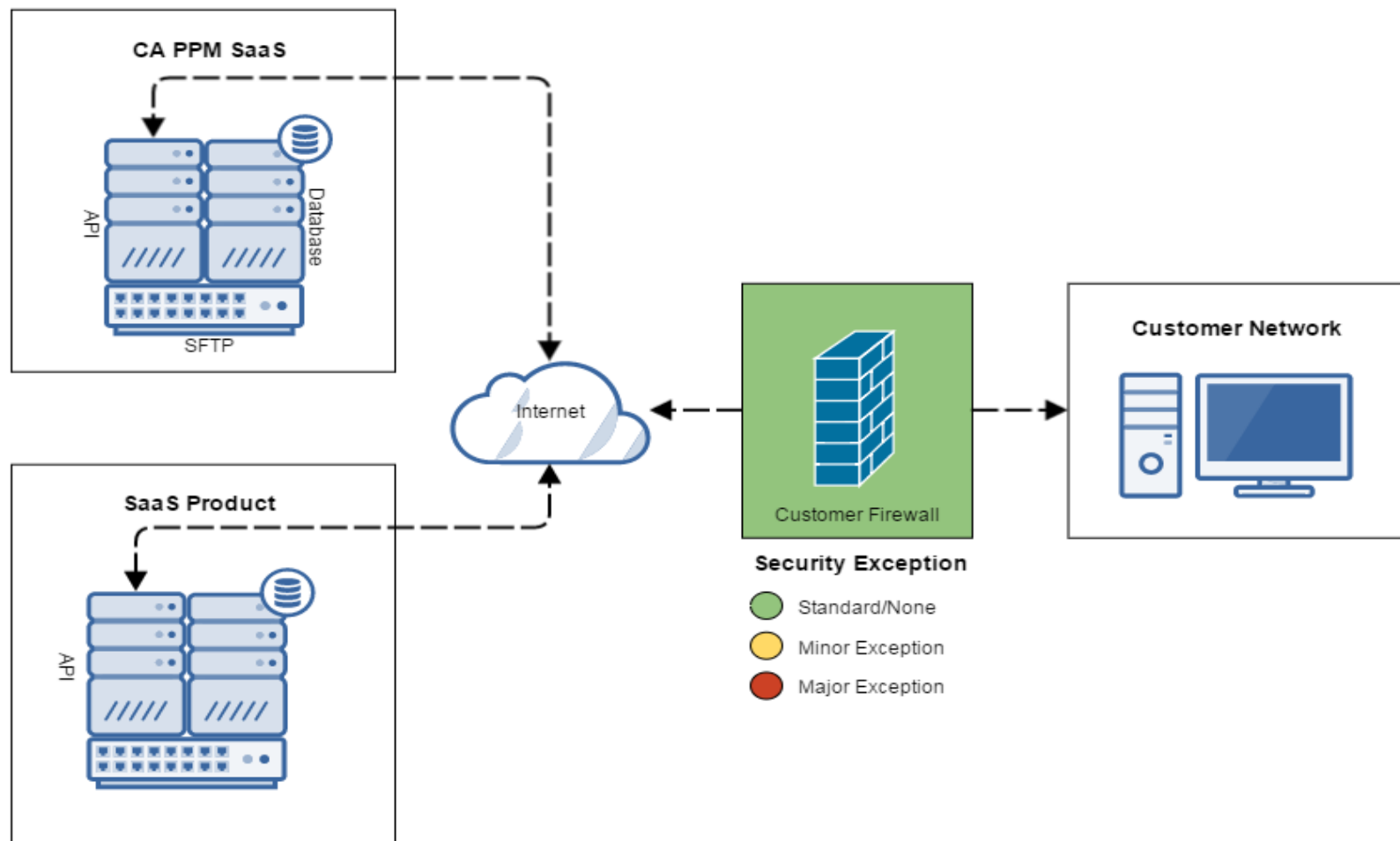
How Should An Interface Be Designed?

- Flat File: CSV export
- Web Services: REST/SOAP
- Database Links (On Premise Only): Database to Database
- Third Party Tools
 - ITROI
 - Pervasic
 - Task Top

Comparing Methods

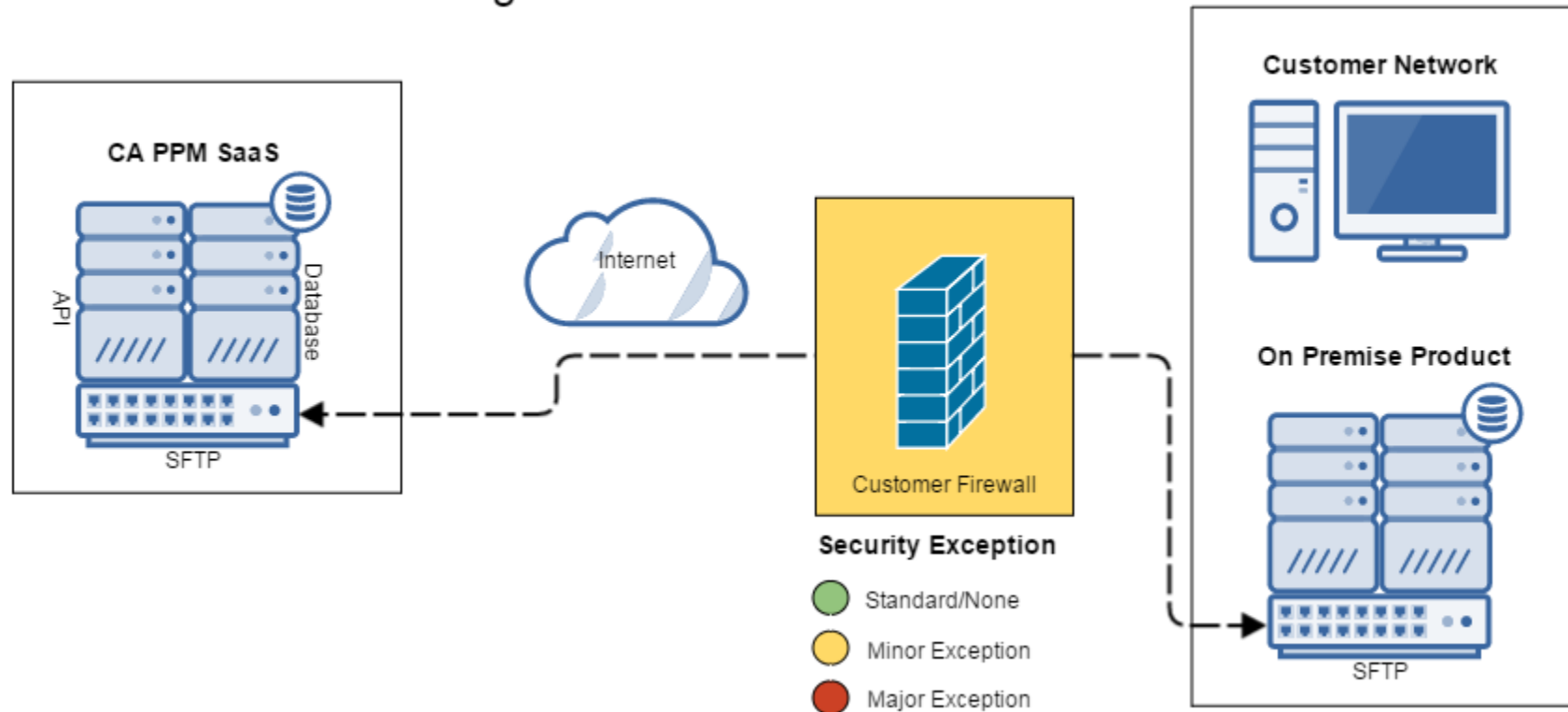
	Inbound Flat File	Web Services	Outbound Flat File
Available in SaaS	Yes	Yes	Yes
Rough effort*	60-80 hours	30-40	Fixed price
Examples	<ul style="list-style-type: none"> • Read data from any legacy system 	<ul style="list-style-type: none"> • Create SAP project from new CA PPM project • Auto create support tickets in CA PPM by reading data from ticketing system 	<ul style="list-style-type: none"> • Send journal entry for capital entry • Time data • Project/tasks
Components	<ul style="list-style-type: none"> • Process to read • Error object 	<ul style="list-style-type: none"> • Process for outbound • Java for inbound • Error Object 	<ul style="list-style-type: none"> • SQL Data Extractor

Method – SaaS API / Web Service / REST

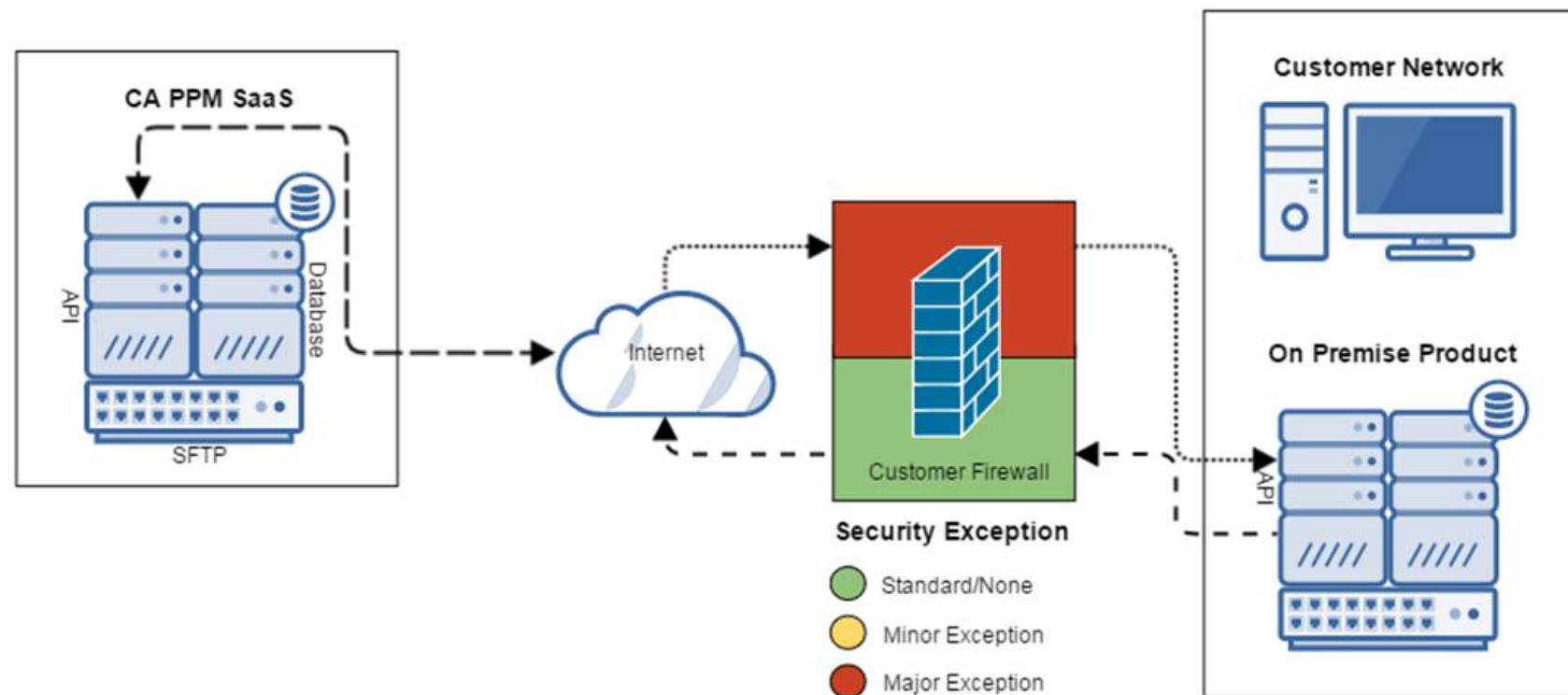


Method – Flat file / SFTP

12

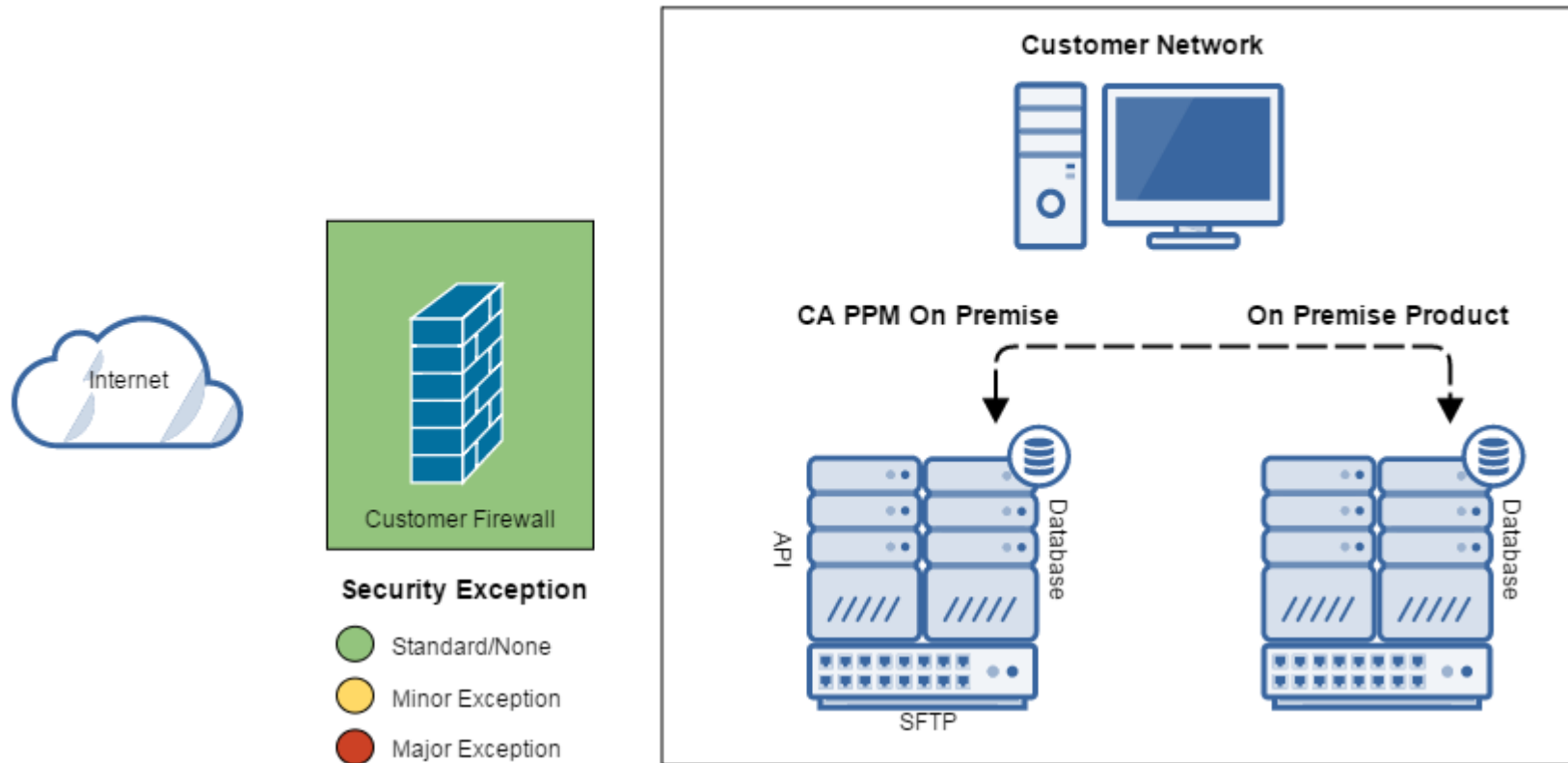


Method – On-Premise API / Web Service / REST



Method – On-Premise to On-Premise via dblink

14



Error Handling & Testing

- Error handling / transaction management
 - Errors are inevitable when two different systems are being integrated
 - Plan to develop an error handling mechanism to handle data errors, connectivity errors, and system outages
 - Equally important is transaction management and performance considerations
- Trial first to avoid errors
 - Before you build the complete interface, try a semi-automated load to ensure the “process” you have defined is correct
 - It is really important to have test environments that mirror the productions as much as possible and that the data is representative of actual production data

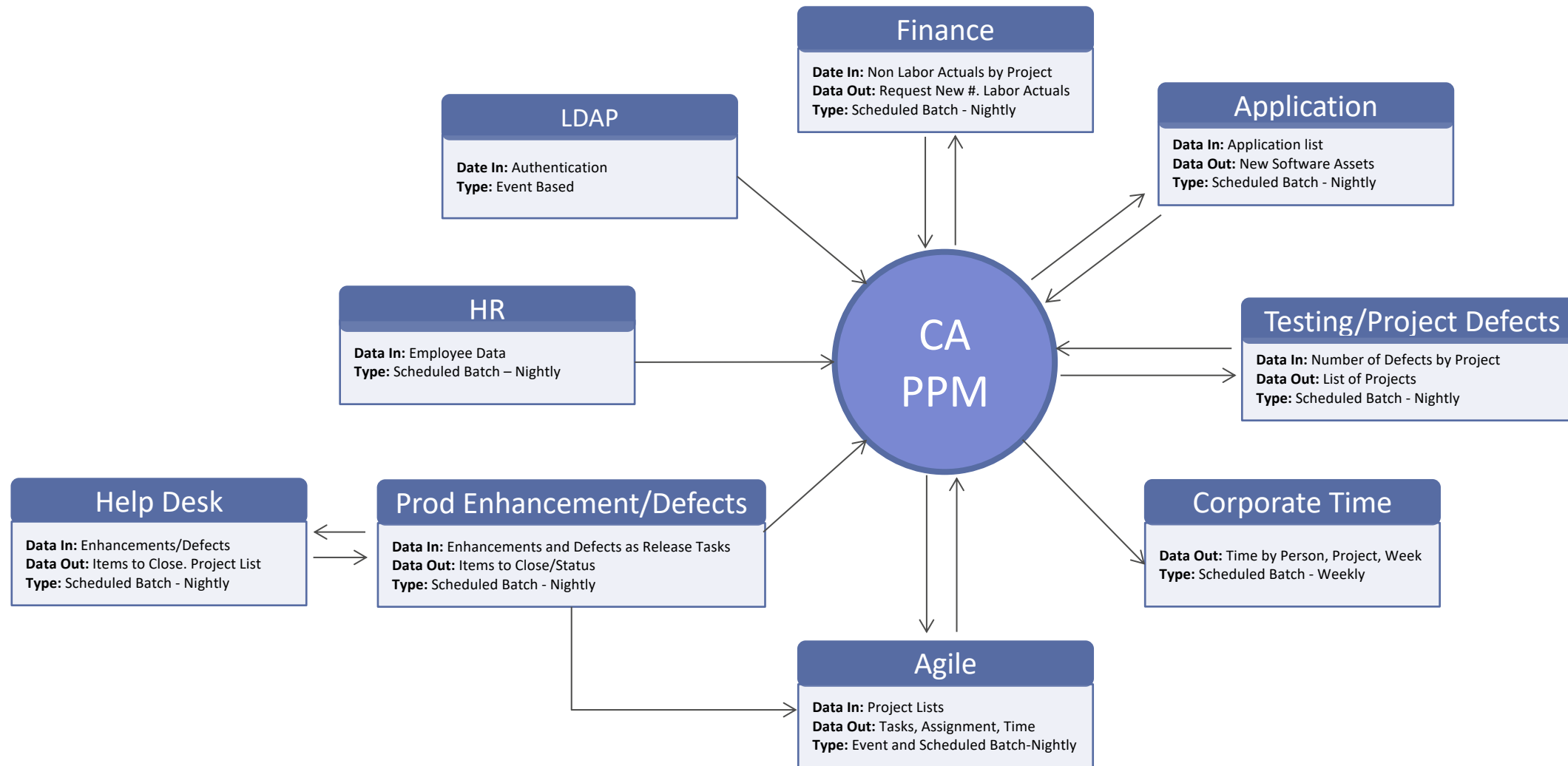
Open Mic

- What integrations do you have?
- How do they work for you?
 - Reliable?
- What did you learn from the integration?

Most Common Integrations

- Agile (Jira, Agile Central, V1, TFS, etc.) - API
 - Project lifecycle
 - Time entry
 - Capitalization expense
- Financial (SAP, Oracle, etc.) – flat file
 - Transactions and time sheets
 - Cost plans
- HR (Peoplesoft, etc.) – flat file
 - LDAP/AD, User syncing
 - Employee reporting structure, cost centers
- ITSM (SNOW, etc.) - API
 - Demand and idea management
 - Ticket escalation

Most Common Integrations



Questions?



*rego*University 2018

Let Rego be your guide.

Thank You For Attending regoUniversity

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.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com