Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

Introduction

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Agenda

- Introduction

- Demand Integration

- Change Request Integration

- Application Integration

- Time Integration

- Questions & Wrap-up

- Appendix A: Integration Details

Quick Questions

- Show of Hands:
  - How many have ServiceNow within your organization?
  - How many have formal project initiation processes that include both CA PPM and ServiceNow?
  - To initiate projects within CA PPM, are you using:
    - Ideas?
    - CA PPM Incidents?
    - Create projects directly?
  - If you are using ServiceNow
    - Are you using Incidents, Problem, Change?
    - Are you using Idea or Demand?
    - Tracking time worked?

Why Integrate ServiceNow & CA PPM

- Users are already using ServiceNow for ITSM requests, expanding to initiate Ideas/Demand may lead to higher adoption.

- Traceability of ITSM service based requests to Projects within CA PPM, and traceability of CA PPM Projects back to idea/incident/request.

- Create a unified process for end users, and a single place for interaction with the business.

- Leverage ServiceNow email survey capabilities.

- Remove dual entry when the source of a CA PPM project is initial work done in ServiceNow.
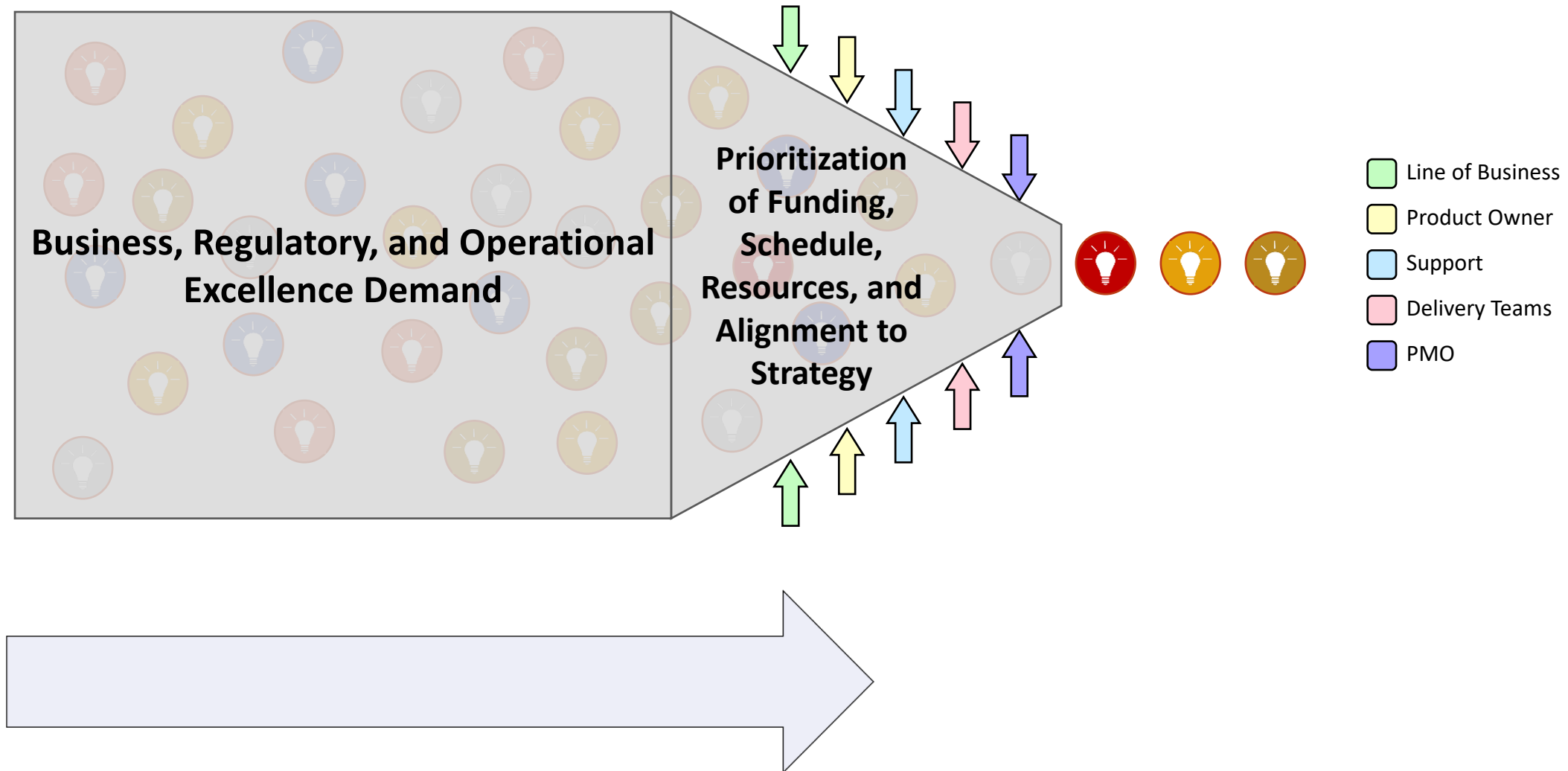
Integration Overview - Demand

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# Best Practice of Demand Process

Business, Regulatory, and Operational Excellence Demand

Prioritization of Funding, Schedule, Resources, and Alignment to Strategy

Line of Business
Product Owner
Support
Delivery Teams
PMO

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Reality of Unmanaged Demand Process

Business, Regulatory, and Operational Excellence Demand

Prioritization of Funding, Schedule, Resources, and Alignment to Strategy

Mid Year Priority Change

Annual Planning

Unplanned Operational / Vendor Impacts

- Line of Business
- Product Owner
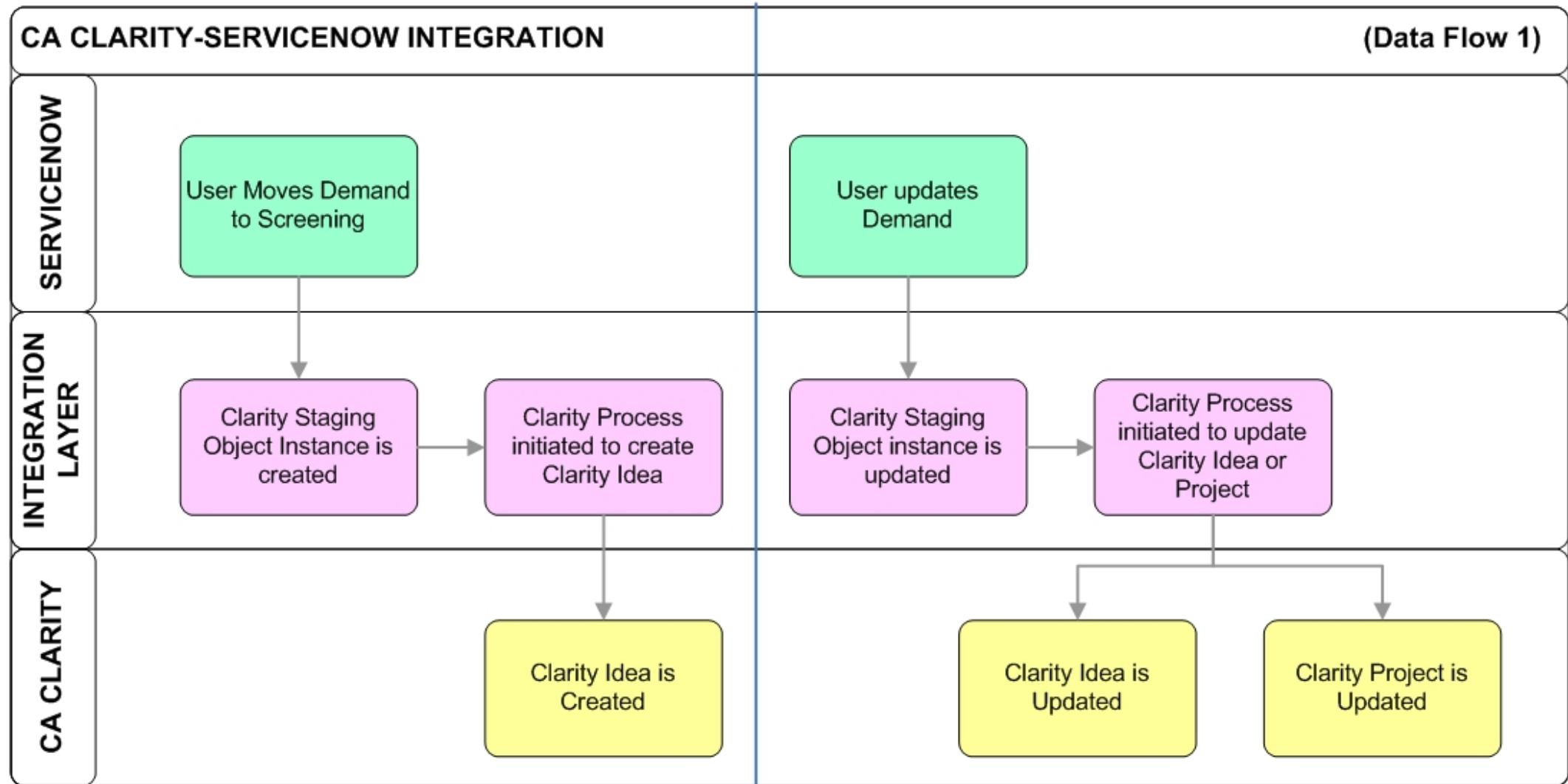- Support
- Delivery Teams
- PMO
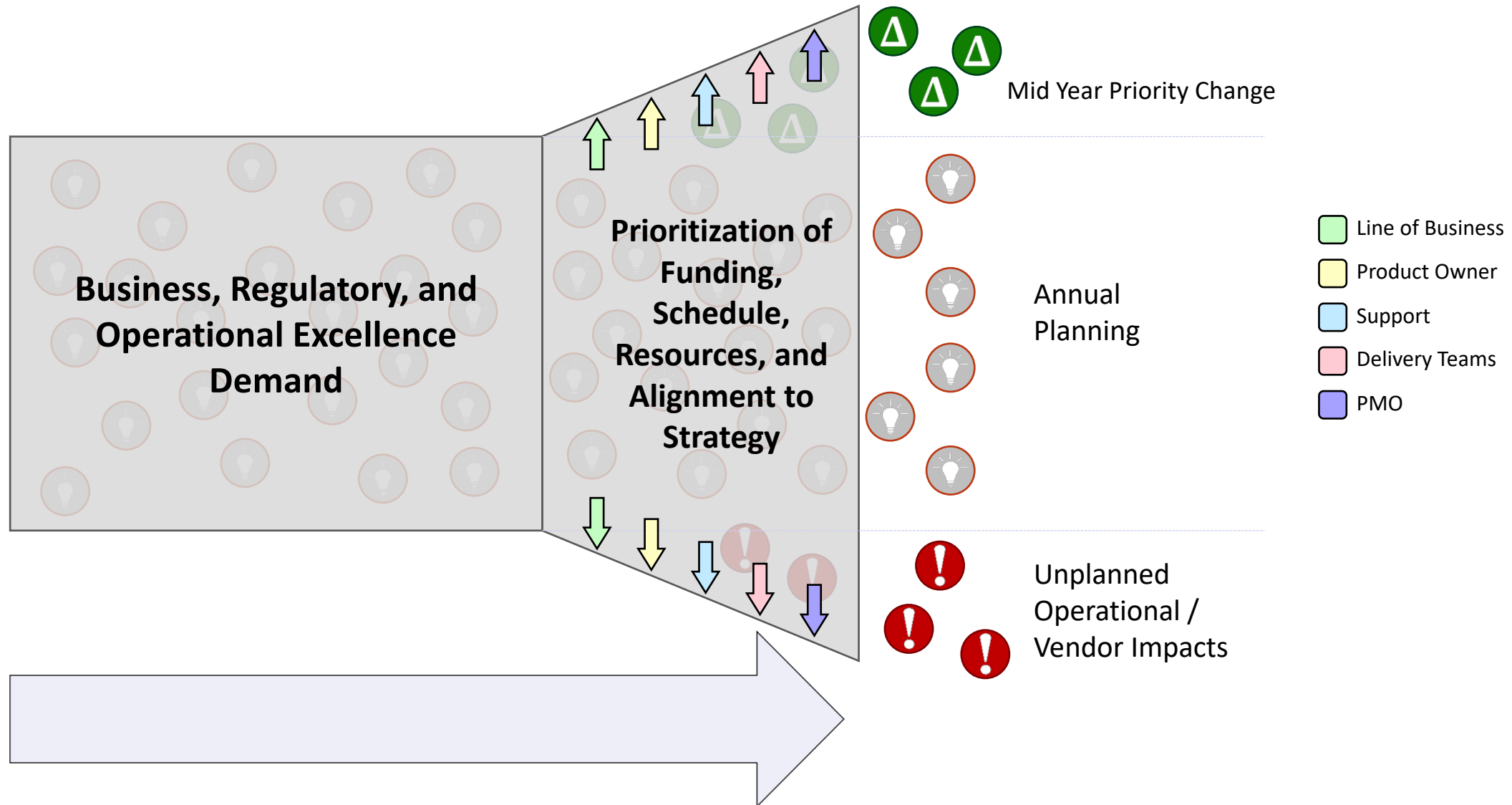
General Functionality

- Real-time interface thru SOAP
- CA PPM Ideas from ServiceNow Incidents and Idea (Red)
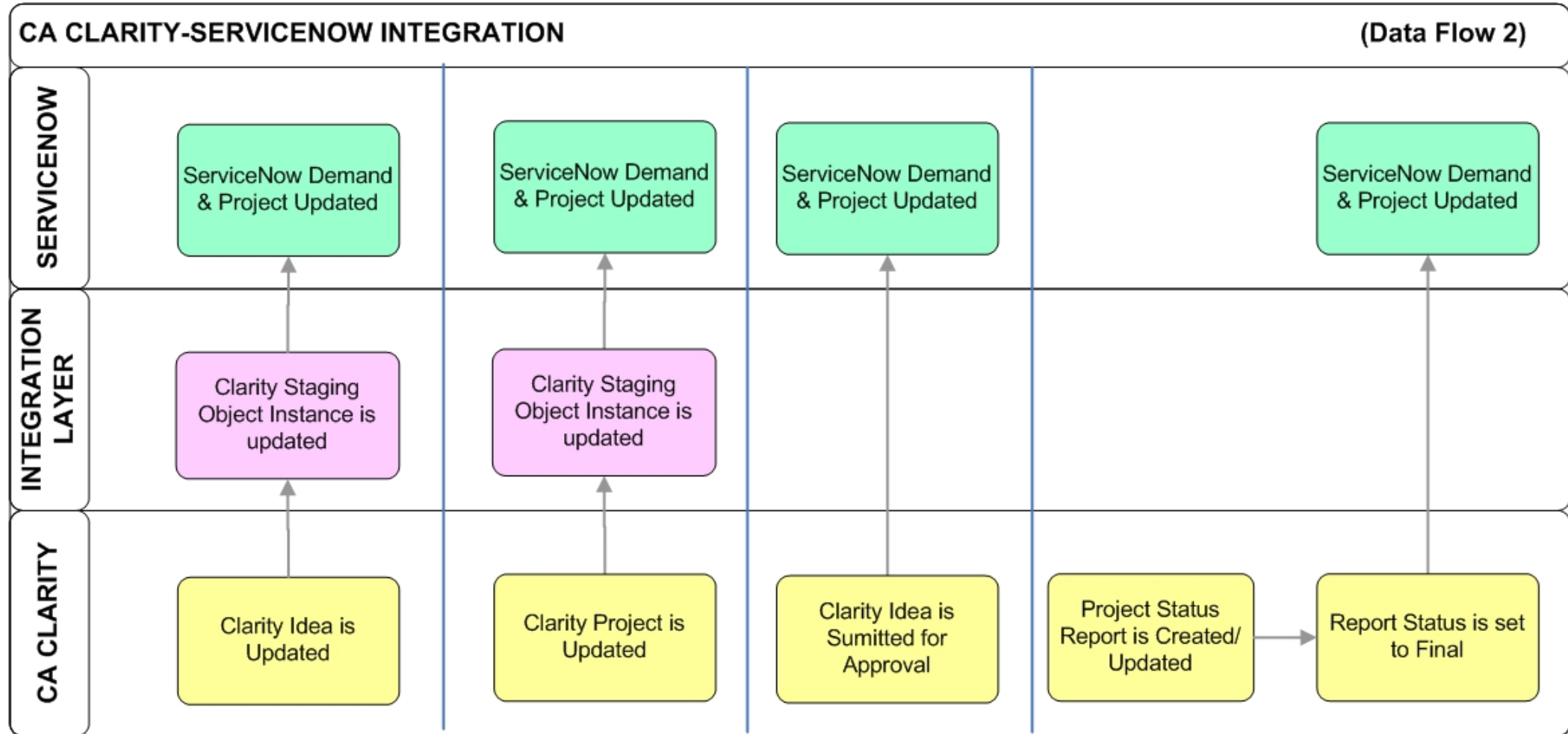- CA PPM Updates ServiceNow Demand (Green)
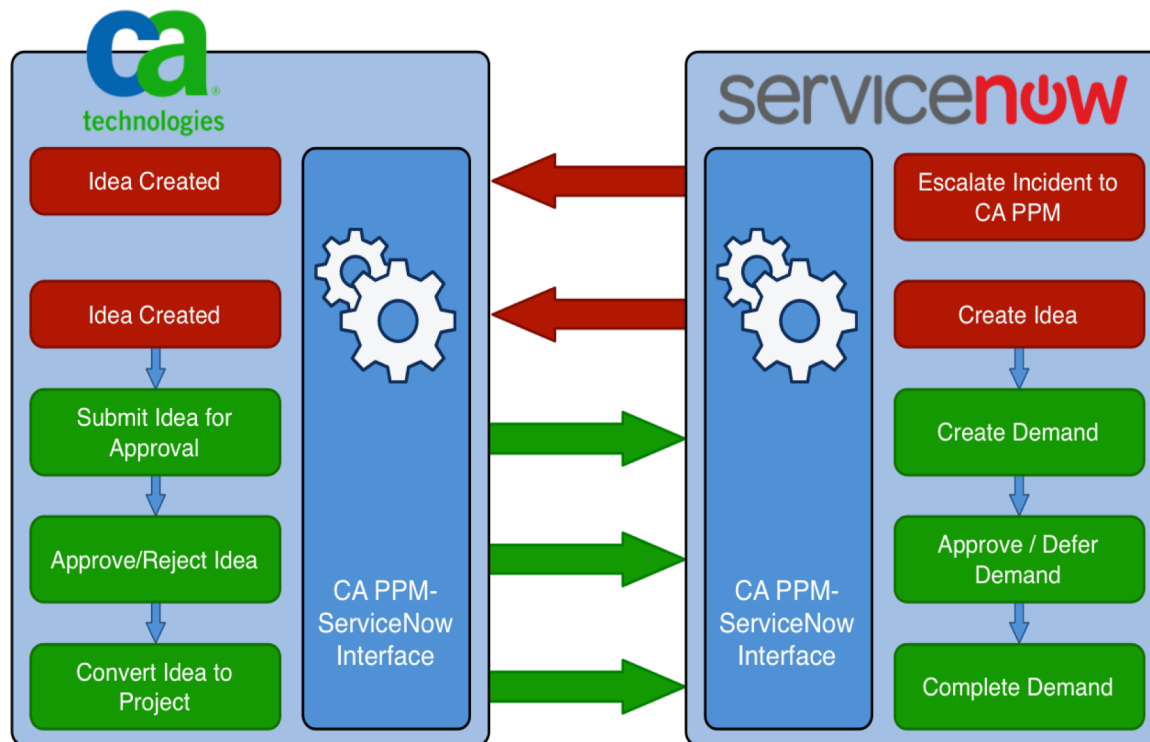
*Rego is a Certified ServiceNow partner and is authorized to Build, Test and Certify Applications on the ServiceNow platform.**
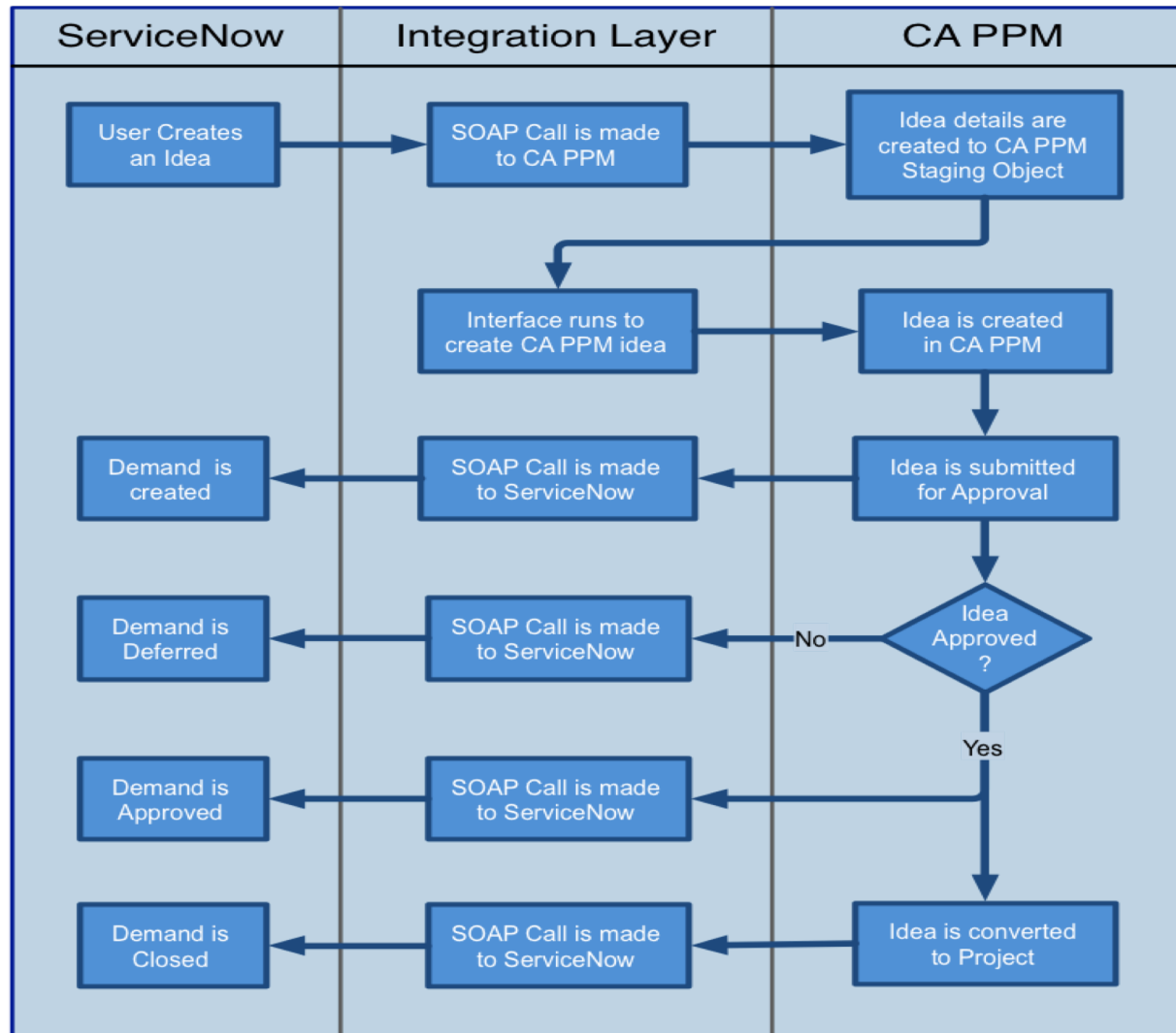
Typical Data Flow (1)

Data Flow (2)

CA CLARITY-SERVICENOW INTEGRATION (Data Flow 2)

SERVICENOW
- ServiceNow Demand & Project Updated
- ServiceNow Demand & Project Updated
- ServiceNow Demand & Project Updated
- ServiceNow Demand & Project Updated

INTEGRATION LAYER
- Clarity Staging Object Instance is updated
- Clarity Staging Object Instance is updated

CA CLARITY
- Clarity Idea is Updated
- Clarity Project is Updated
- Clarity Idea is Sumitted for Approval
- Project Status Report is Created/ Updated → Report Status is set to Final

Use Case: CA PPM Ideation Sync with ServiceNow

ServiceNow	Integration Layer	CA PPM
User Creates an Idea	SOAP Call is made to CA PPM	Idea details are created to CA PPM Staging Object
	Interface runs to create CA PPM idea	Idea is created in CA PPM
Demand is created	SOAP Call is made to ServiceNow	Idea is submitted for Approval
Demand is Deferred	SOAP Call is made to ServiceNow	Idea Approved? — No
Demand is Approved	SOAP Call is made to ServiceNow	Yes
Demand is Closed	SOAP Call is made to ServiceNow	Idea is converted to Project

Change Request Integraton

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Change Request Process

CA Clarity™ PPM

Create/Update Project

A new instance is created for ServiceNow Change Request object under the Clarity Project.

ServiceNow Change request instance from old project is deleted

ServiceNow Change request instance is created on the new Project

servicenow

Create/Update New Record in Custom Table

On Change Request, select CA PPM Project from lookup field

On Change Request, change CA PPM Project associated

- Custom Table in ServiceNow maintains the list of Projects in Clarity
- CA PPM Project Field on ServiceNow Change Request references to the custom Table
- When CA PPM Project is changed to Active/Inactive, corresponding entry in ServiceNow Custom table is updated as Active/Inactive.
- ServiceNow Change Requests is a custom object in Clarity. This is a sub-object of Clarity Project object.
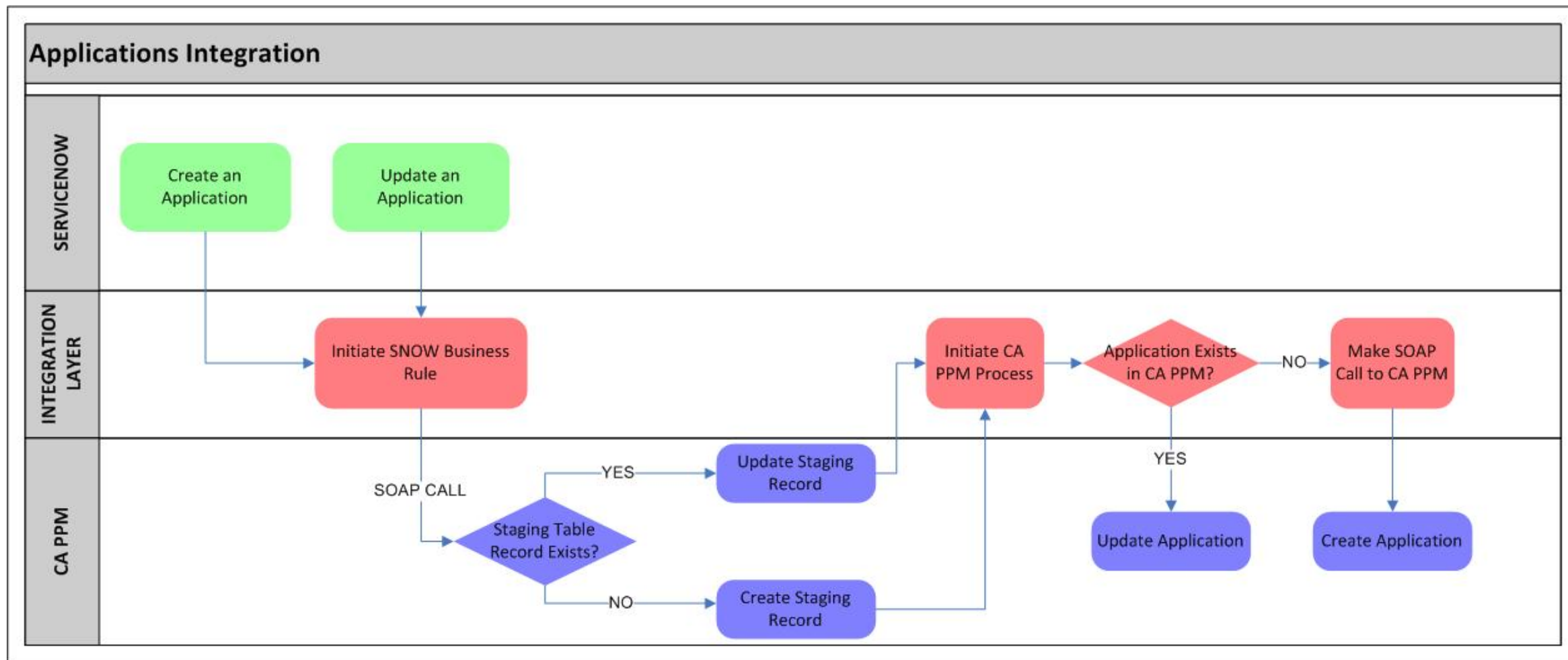
Applications Integration

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General Architecture
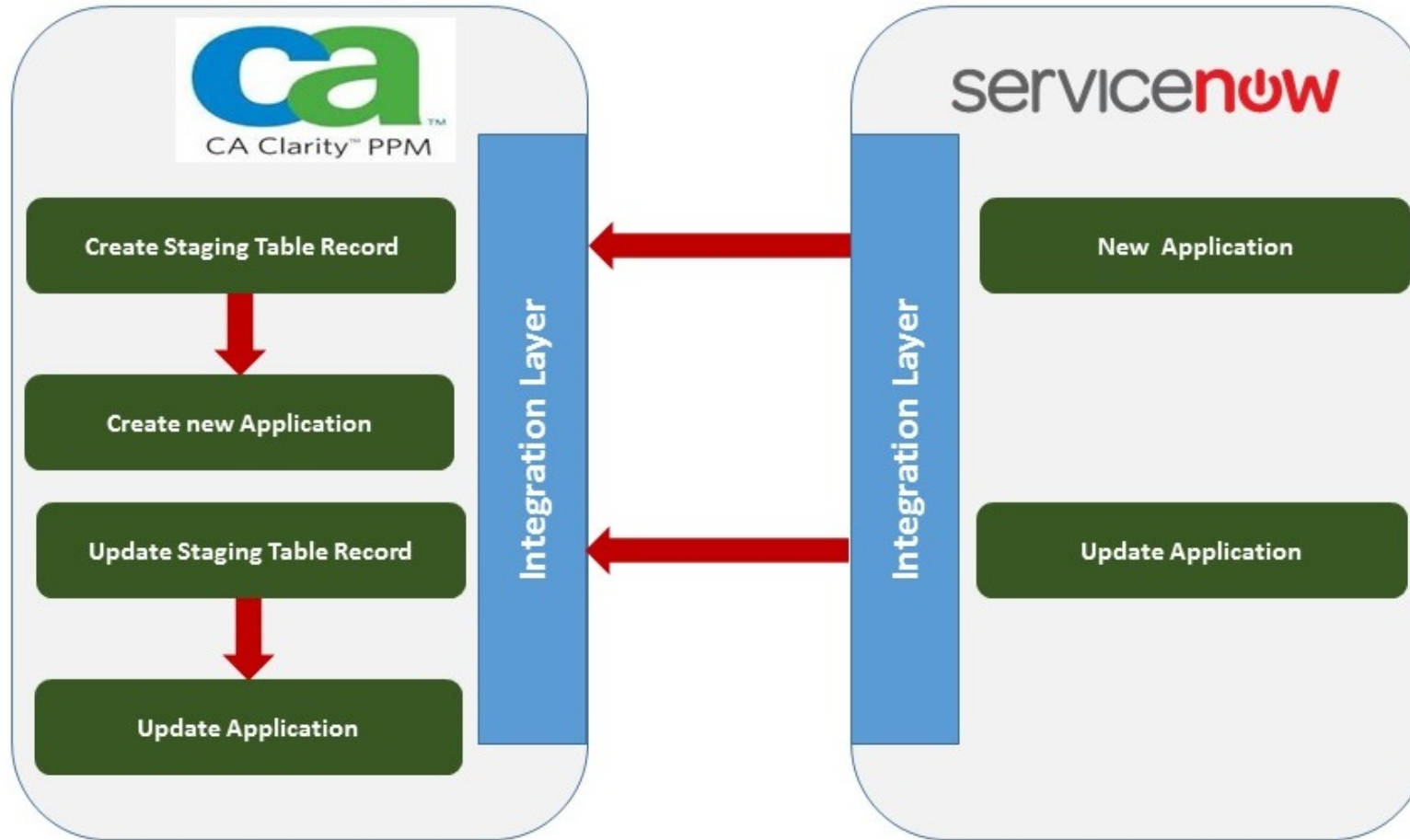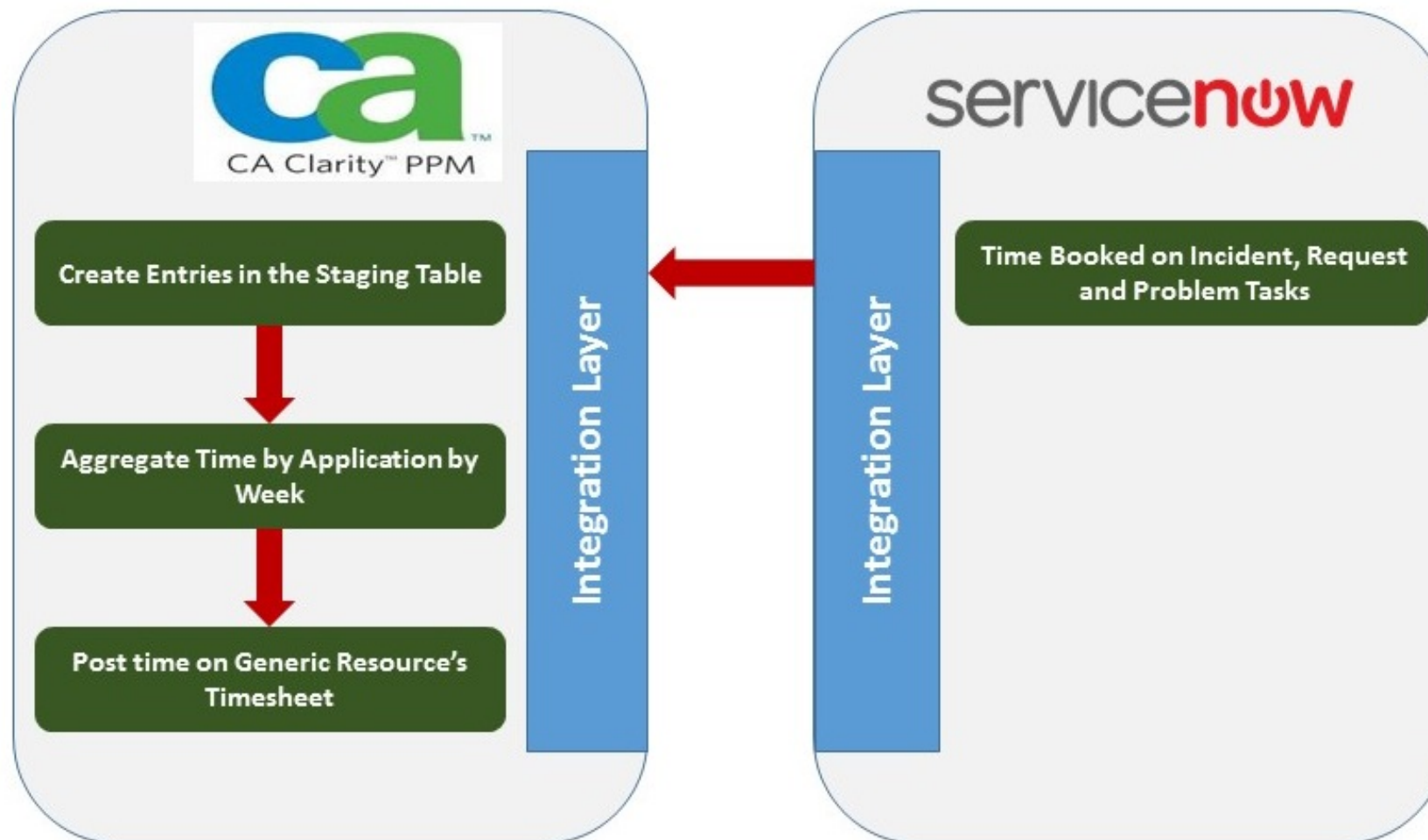
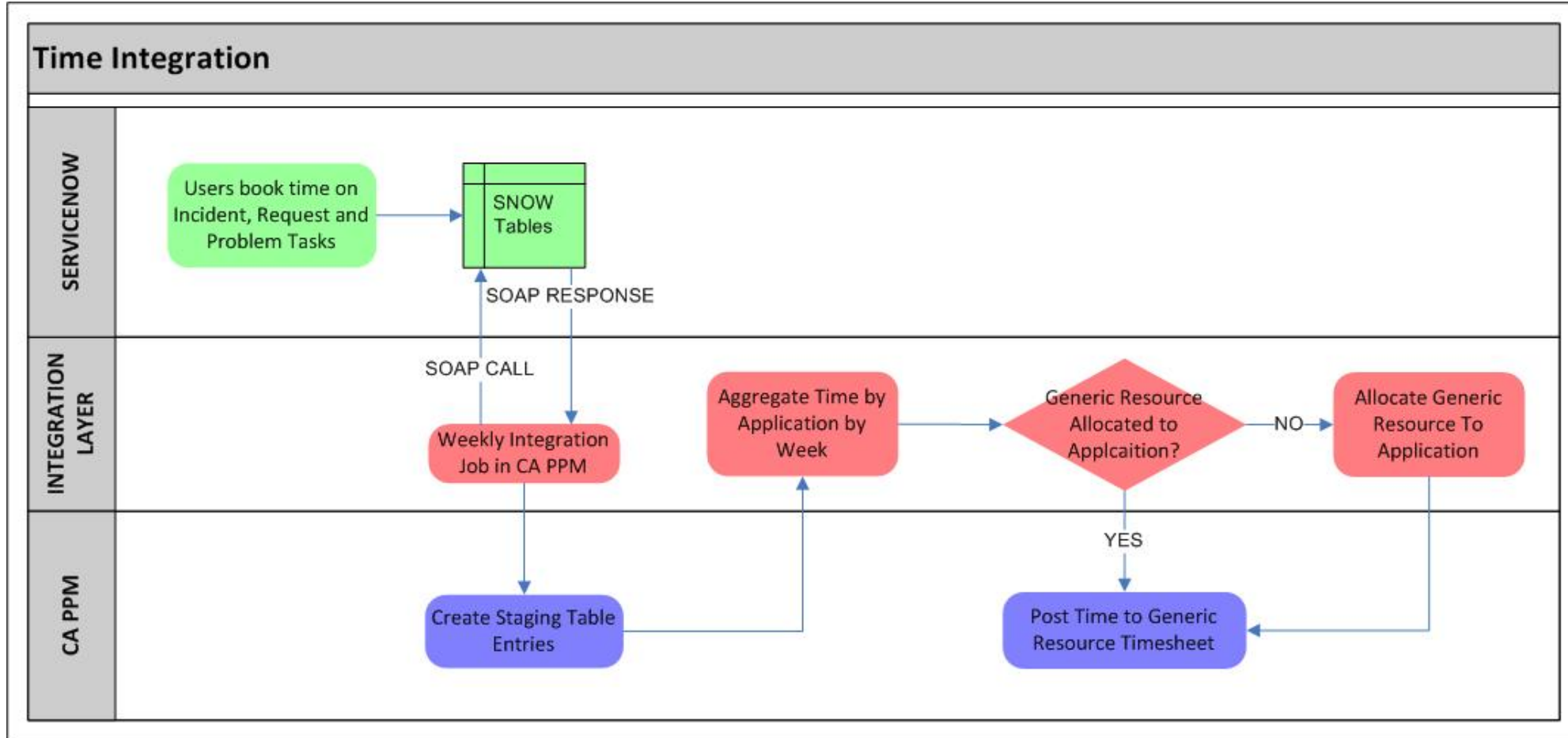# Application Integration

Time Integration

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General Architecture

Time Integration from ServiceNow

Open Mic

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Thoughts on Future Integrations

- What integrations would you like to see between ServiceNow and CA PPM?

- Have you considered a more formal alignment for Application Portfolio Management?

- Are CA PPM project financials shared to the a formal IT Financial Management tool?

- Additional Software Asset Management or Customer Service Support alignments?

Questions?

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Thank You For Attending regoUniversity

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- 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**
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