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RegoLink
Clarity + Excel

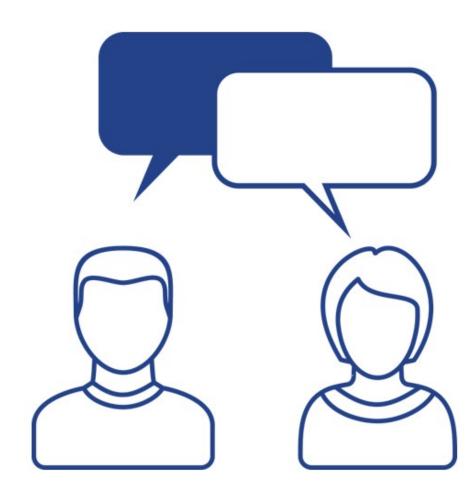**Your Guides:**
Luis Palacios & Wes McCoubrie

Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

Agenda

- Clarity and Excel

- Excel Data Manager

- Excel Data Manager Demo

Part III:
Clarity and Excel

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Clarity and Excel

- End users like to use Excel, it is one of the most well-known tools and flexible when it comes to handling data.

- Uploading Excel Data to Clarity can become a challenge, given it is not an OOTB functionality.

  - Pulling data is relatively easy given most grids in Clarity, allow for Excel/CSV exports. Still there is no easy way to modify and push back through Excel.

  - To Push Data to Clarity, an integration is needed. This normally requires the file to be uploaded either to the server, SFTP service or as an attachment through an object instance. While it processes in the background

Clarity and Excel

- Excel to Clarity pushes offer multiple benefits like:

  - Shorter turn around times for bulk uploads

  - Bulk uploads from other applications

- While at the same time, guardrails must be enforced for:

  - Authentication and interface access
  - Data validations
  - Use and maintain templates
  - Error Handling and Notifications

Clarity and Excel

- Common use cases for Excel to Clarity integrations:
  - Mass updates for Users
  - Bulk upload for financials: Financial Plans, Financial Transactions, etc.
  - Bulk upload for Resource Management: Project Teams, Allocations, etc.

Part II:
Excel Data Manager
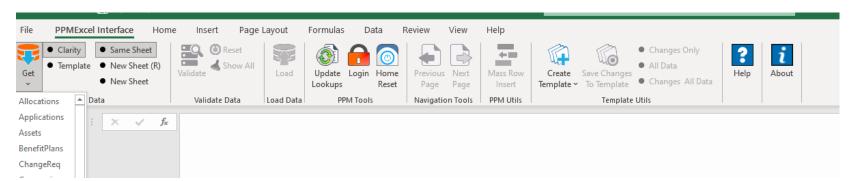
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Excel Data Manager

- Rely on one of the most popular tools in the corporate world, Excel. Allowing users to bulk update data and save time

- Allows users to process Clarity data in Microsoft Excel:
  - Extract Data: Easily Extract through predefined or custom interfaces
  - Edit Data: using Excel's functionality like (filters, sorting, copy and paste, drag and drop, etc). While enhancing the experience with Clarity specific logic like data types.
  - Validate Data: Validate the data similar to how Clarity does it: using lookups and attribute types work
  - Send Data: Send large data sets through Rego's Data Processor

Extract Data

- Extract Data
  - Using one of the 25 samples provided by Rego
  - Custom Interfaces built to match your environment
- Data is handled via XOG making it GCP, AWS and On Premise compatible
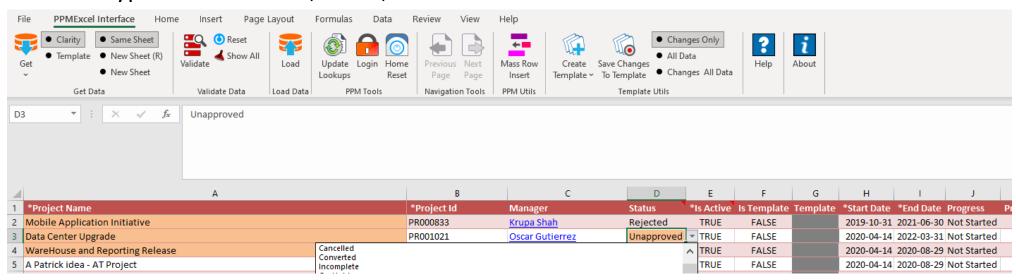- Easy to use Excel Ribbon to interact with your environment. Allows you to select the data and filtering criteria

- Applications
- Assets
- Change Requests
- Companies
- Ideas
- Incidents
- Issues
- Locations
- Lookups
- Others
- Products
- Programs

- Project Teams
- Rate Matrix
- Release Plans
- Releases
- Requirements
- Resources
- Risks
- Roles
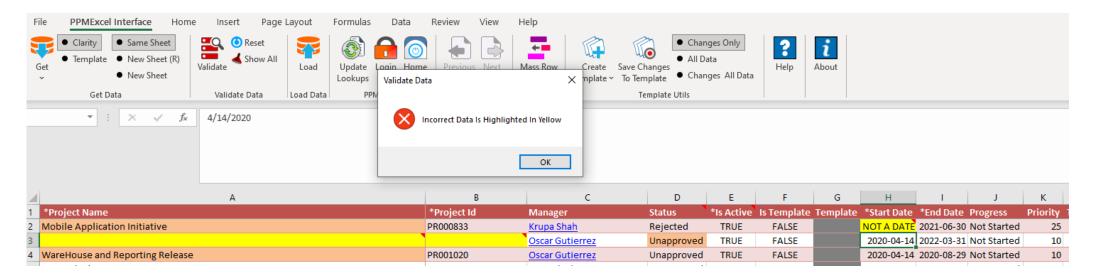- Services
- Skills
- Tasks
- Users

Edit Data

- Data is loaded as an Excel sheet, which can be easily modified, individually or with Excel Data Manager's Search and Replace functionality.

- Visual aids allow you to easily identify:

  - Modified Data

  - Read Only Data

  - Required Fields

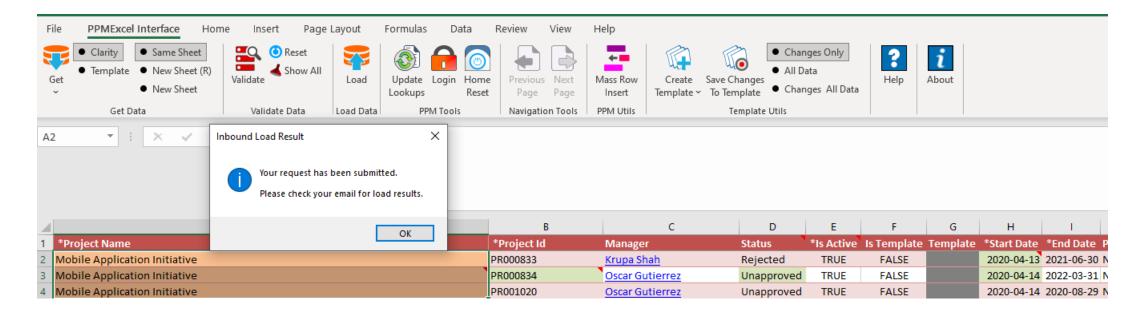 - Data types like numbers, dates, etc.

Validate Data

- Easily validate data and provide visual aids before loading data.

- EDM can easily identify:
  - Required fields
  - Data types
  - Lookups and dependent lookups
  - Use Excel Built In functions

Load Data

- Load data with the click of the button

- Avoid having to depend on end user's computers (limited resources) or networks. Rego's Data Processor will receive and process the data, ensuring optimal performance running inside of Clarity's process engine.

- Receive notifications and execution details seamlessly

Part III:
Excel Data Manager Demo

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Questions?

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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**
- 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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