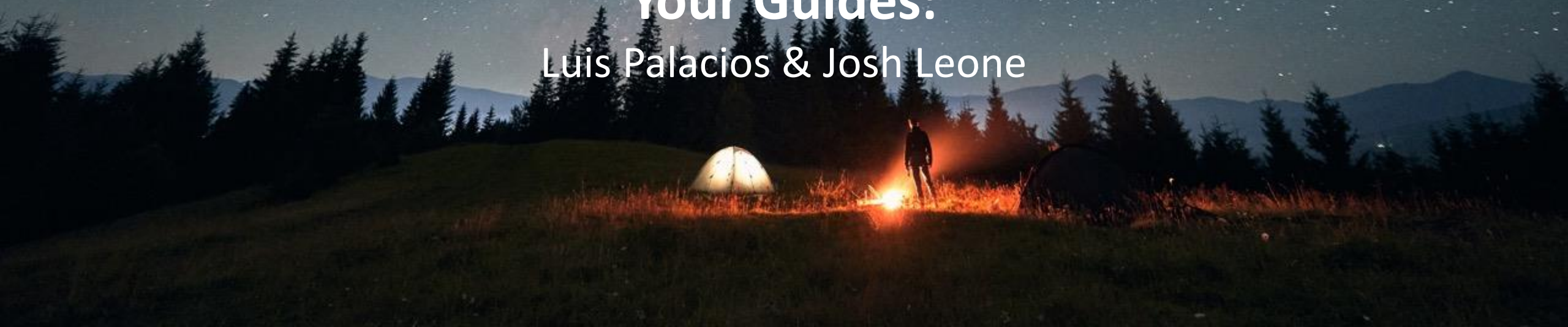




RegoLink Clarity + Teams/SharePoint

Your Guides:

Luis Palacios & Josh Leone



Introductions

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



Agenda

- Introduction
- Samples and Use Cases
- Demo

Part I: Introduction



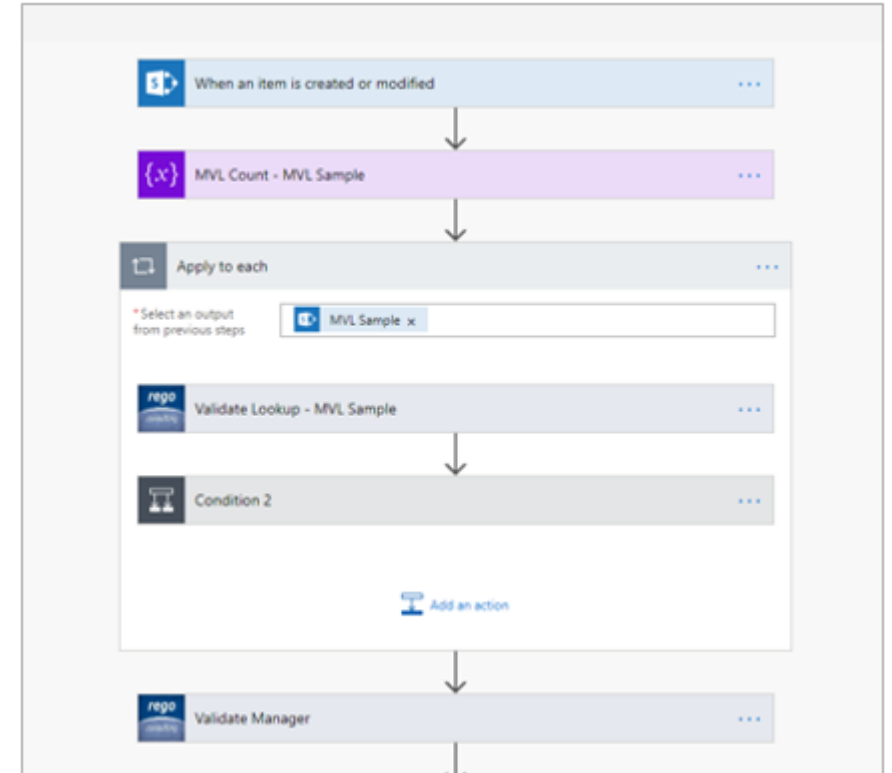
Let Rego be your guide.

RegoLink – MS Ecosystem Connector

- Power Automate (A.K.A Microsoft Flow) Connector created by Rego, certified by Microsoft.
- Allows Office 365 Organizations to create automation flows via a Browser based UI, with robust processing power and capabilities. While using a No-Code approach.
- RegoLink – MS Ecosystem Connector
 - Universal Clarity connector to read or write data to Clarity PPM, using XOG. (GCP and AWS compliant)
 - Integrates with Clarity's Process Engine to trigger workflows
- Natively integrates with the Office 365 ecosystem:
 - Other Office 365 services like: SharePoint, Teams, Outlook, MS Forms, Power Automate, Approvals, Power BI, etc.
 - Easily request approvals, send notifications and error handling.

RegoLink – MS Ecosystem Connector

- Additional benefits:
 - Empower Users
 - Manage Approvals
 - Manage credentials
 - Analytics
 - Administrate your Flows, Templates, Permissions
 - Troubleshoot and Audit
 - Mobile and Desktop Applications



Part II:

Samples and Use Cases

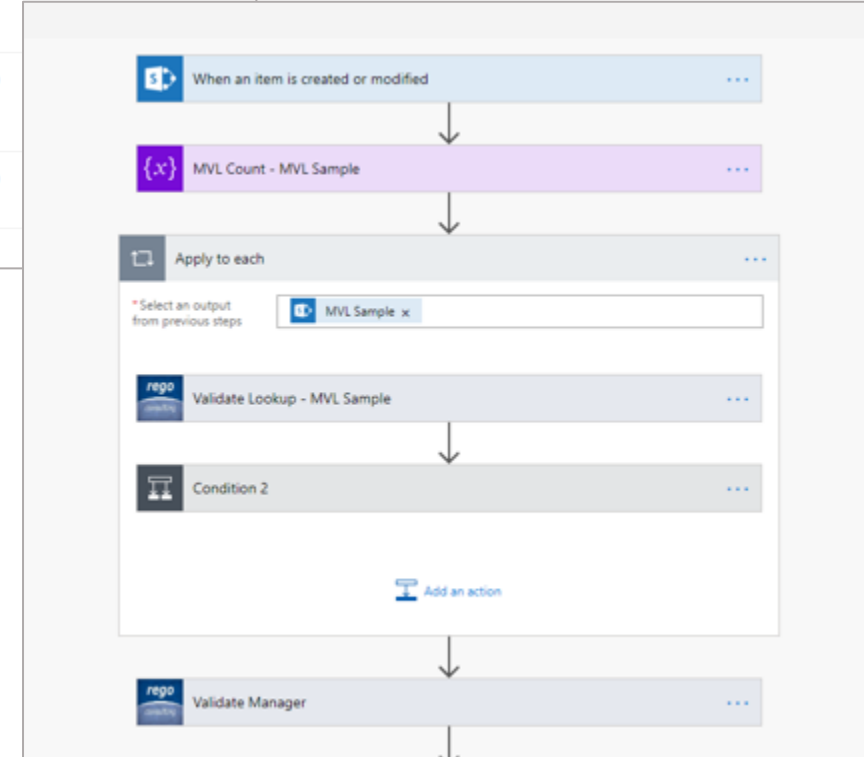


Let Rego be your guide.

Examples –SharePoint Lists with CA Clarity

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	

- Allows users:
 - Automation to and from CA Clarity
 - Transforms the user-friendly values into valid CA Clarity lookup values
 - Intake Ideas, Projects or other investments via SharePoint Lists or Forms



Examples – Synchronize Outlook Calendar

- From CA Clarity to Outlook:
 - Milestone Dates
 - Tasks
 - Target Dates like Risks, Issues, Change Requests
- From Outlook to CA Clarity:
 - Out of Office Dates to Resource Calendars
 - Extend Tasks or Project Dates

Filter: None ▾

Task Name

Task ID

Key Task All ▾

Tasks Only All ▾

Start to

Finish to

Filter Show All Save Filter Clear

<input type="checkbox"/>	Task	Task ID	Start	Finish	Baseline Finish
<input type="checkbox"/>	My Milestone 1	TSK001	2/6/19	2/6/19	
<input type="checkbox"/>	My Milestone 2	TSK002	2/12/19	2/12/19	

My Milestone 1 - Event

File **Event** Insert Format Text Review Help Tell me what y

Appointment Scheduling Assistant

Skype Meeting Online Meeting Teams Meeting Meeting Notes

Subject **My Milestone 1**

Location

Start time **Wed 2/6/2019** 12:00 AM ☒ All day event

End time **Wed 2/6/2019** 12:00 AM

Is Late All ▾

Critical All ▾

Milestone All ▾

Open for Time Entry All ▾

Power Filter [Build Power Filter]

Examples – Create SharePoint Sites / Team Spaces

- 1 to 1 mappings of Clarity Projects to a SharePoint Site or Team space
- Seamlessly provide access to the Project Manager, Team Members and additional Clarity users. While allowing SharePoint/Teams admins to invite additional members or rely on native functionality like sharing
- Access SharePoint Sites or Teams documents within Clarity

Clarity PPM

PROPERTIES TEAM TASKS FINANCIAL PLANS RISKS/ISSUES/CHANGES CHARGEBACKS PROCESSES HIERARCHY COLLABORATION DASHBOARD ITD VISUAL TASK BOARD **REGOLINK DOCUMENT MANAGER**

Project: New Computers - *RegoLink Document Manager*

RegoLink Document Manager

Document Library

Documents

+ New Folder Upload File(s) Delete File(s) Open in SharePoint Refresh

Documents > General

Name	Owner	Modified By	Last Modified
Project SOW.docx	Luis Palacios	Luis Palacios	2019-12-05

Open in SharePoint
Download
Delete

Sign out luis.palacios@regoconsulting.com

And Much More!

- Create Risks or Issues via email
- Improve Collaboration Manager by creating Microsoft Teams or SharePoint Sites
- Handle Approvals
- Hundred of Connectors



Part III: Demo



Let Rego be your guide.

Questions?



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