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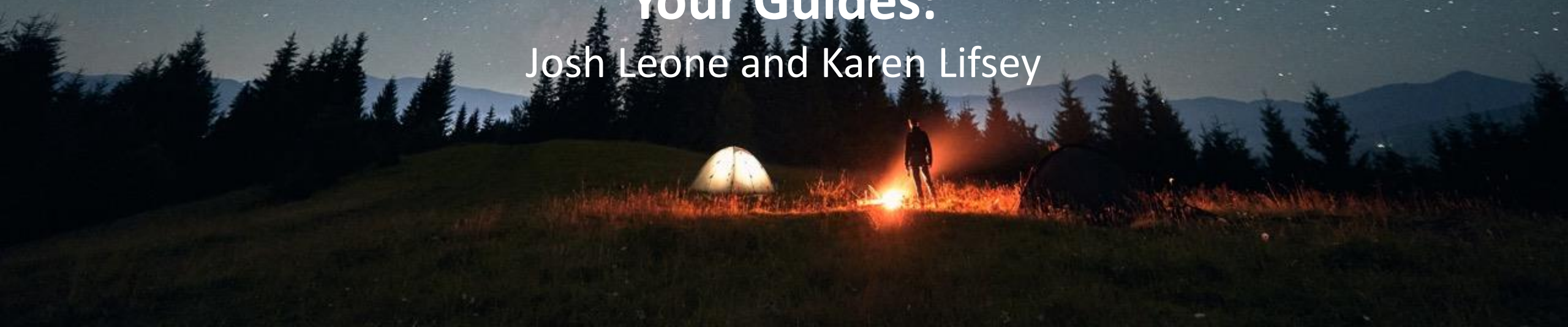# Clarity Integrations | Most Common

Your Guides:

Josh Leone and Karen Lifsey

Agenda

- Why Integrate?

- How you Integrate

- Most common Integrations

- Lessons Learned

Part I:
Why Integrate?

Why Integrate?

- What do clients cite as are the primary drivers for integration?

  - Optimize business processes and reduce costs
    - Reduce "bottlenecks" by eliminating administrative activities and double entry
  - Integrate instead of replacing legacy systems
    - Integration is more affordable than purchasing new systems
  - Generate competitive advantage
    - Speed to delivery
  - Connect and advance the company
    - Inspire collaboration
  - Foster a "global" vision of the company
    - Improved visibility of data sets, enable data consistency

Why Integrate Is Important

System integration is becoming more important due to the increasing advances in automation technology, and the associated need to simplify processes for easier management. An **integrated system** will streamline your processes, reduce costs and ensure efficiency.
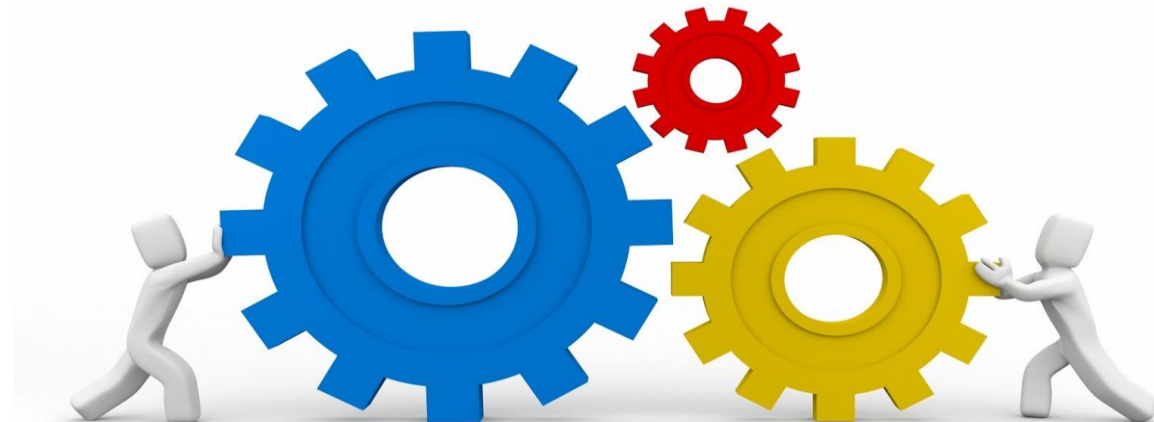
Benefits Of Integration

- **Easier for Administrators and Users**
  - Eliminates use of multiple tools, reducing training time and lessens change of human error
- **Cost and Storage Savings**
  - Reduce time spent on upkeep and troubleshooting
  - Decrease storage and application costs
- **Better Analysis**
  - Easier access to centralized and normalized data
- **Improved System Security**
  - Fewer points of access to protect
- **Opportunity for Real Time Data**
  - Improved visibility for more accurate and timely decisions
- **Accelerated Growth and innovation**
  - Reduce process steps to allow more time for value add activities

Part II:
How you integrate

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Integrations Have Come A Long Way

- Ten years ago integrations were very expensive and technically challenging

- Integration technology has evolved becoming more dependable, timely and cost effective
  - Web Services
    - SOAP
    - REST
    - GraphQL – Bleeding edge
  - 3rd Party Services
    - IAAS
    - Webhooks
  - The cost of a typical Rego Integration is $8K inbound and $6K outbound

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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

Transport

- API
  - REST
  - SOAP
- Flatfile
  - Inbound
  - Outbound
- Direct
- Integration Bridge products
  - Mulesoft
  - Snaplogic
  - Tasktop
  - Dell Boomi
  - Relevus
  - Etc.

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Location, location, location

- Is CA PPM On-Premise or SaaS?

- Is the system being integrated with On-Premise or SaaS

- Technical / Security Limitations
  - CA PPM SaaS to SaaS
    - Most SaaS applications have a rich API suite to facilitate integrations
    - Beware of security limitations of outbound web service calls from CA PPM
  - CA PPM SaaS to On-Premise
    - Cannot pull data from On-Premise
    - Cannot push data to On-Premise
  - CA PPM On-Premise to On-Premise
    - Many options

Data flow when a hybrid SaaS/OP model

On Premise API/Web Service/REST based integration
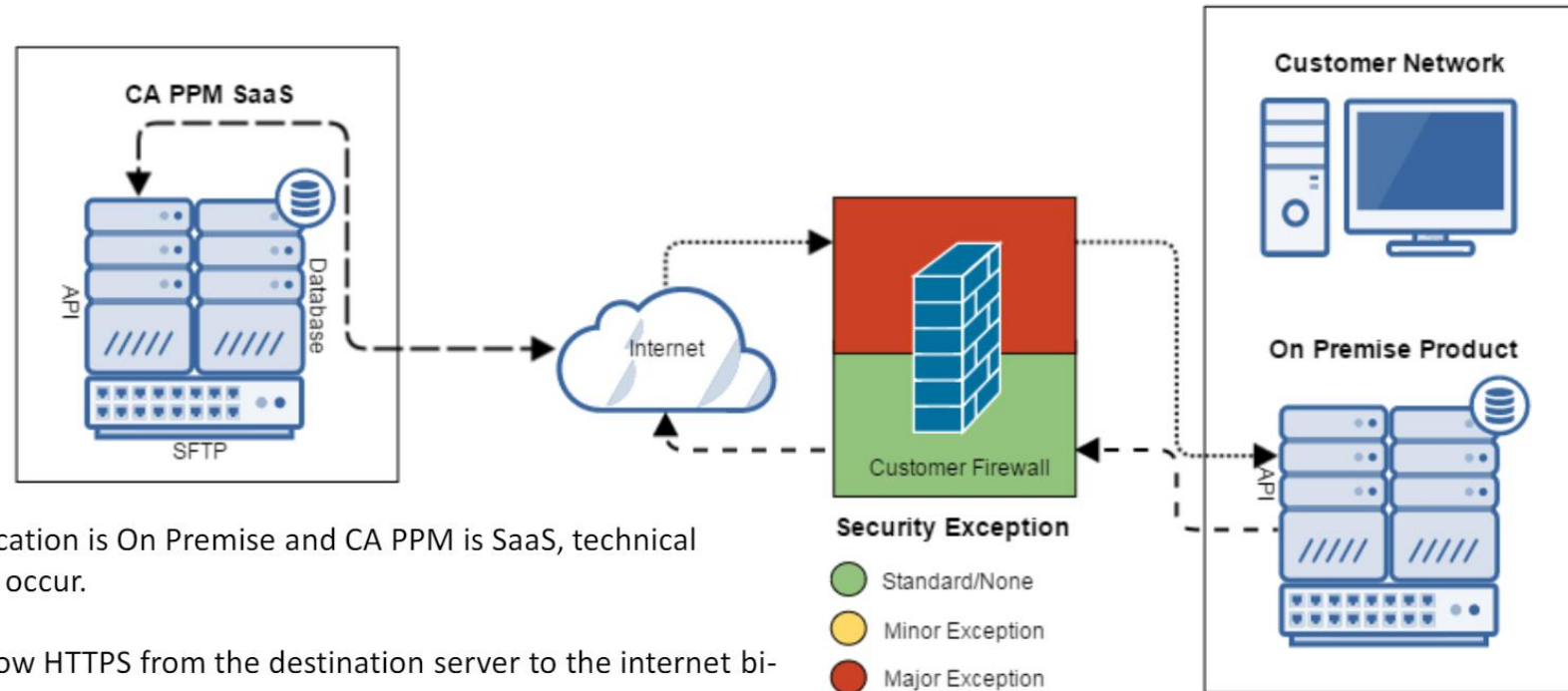
If the destination application is On Premise and CA PPM is SaaS, technical considerations need to occur.

1. The firewall must allow HTTPS from the destination server to the internet bi-directionally.
2. The destination server must be protected by a SSL cert from a Certificate Authority (not self signed.)

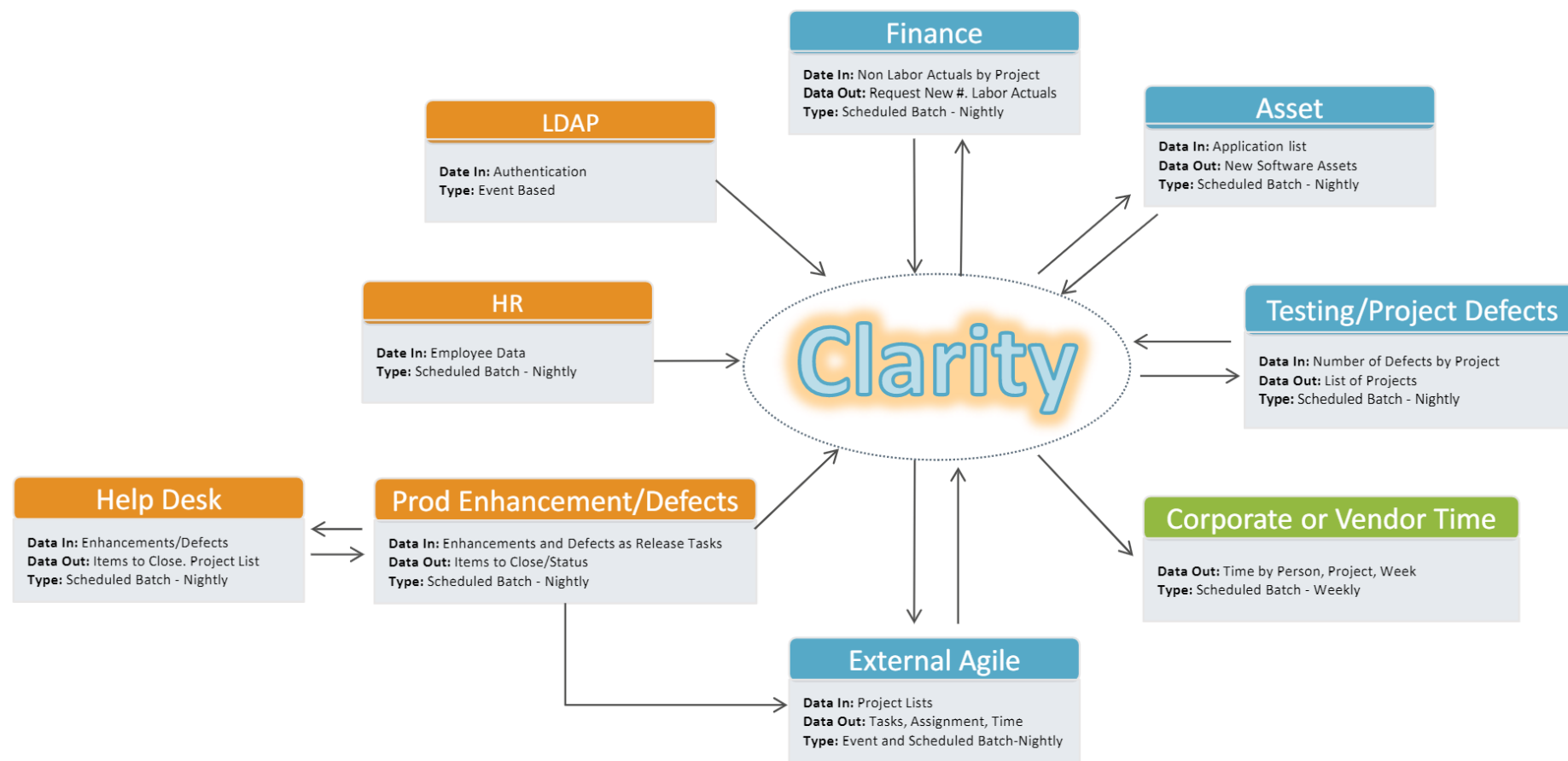# Method –API / Web Service / REST
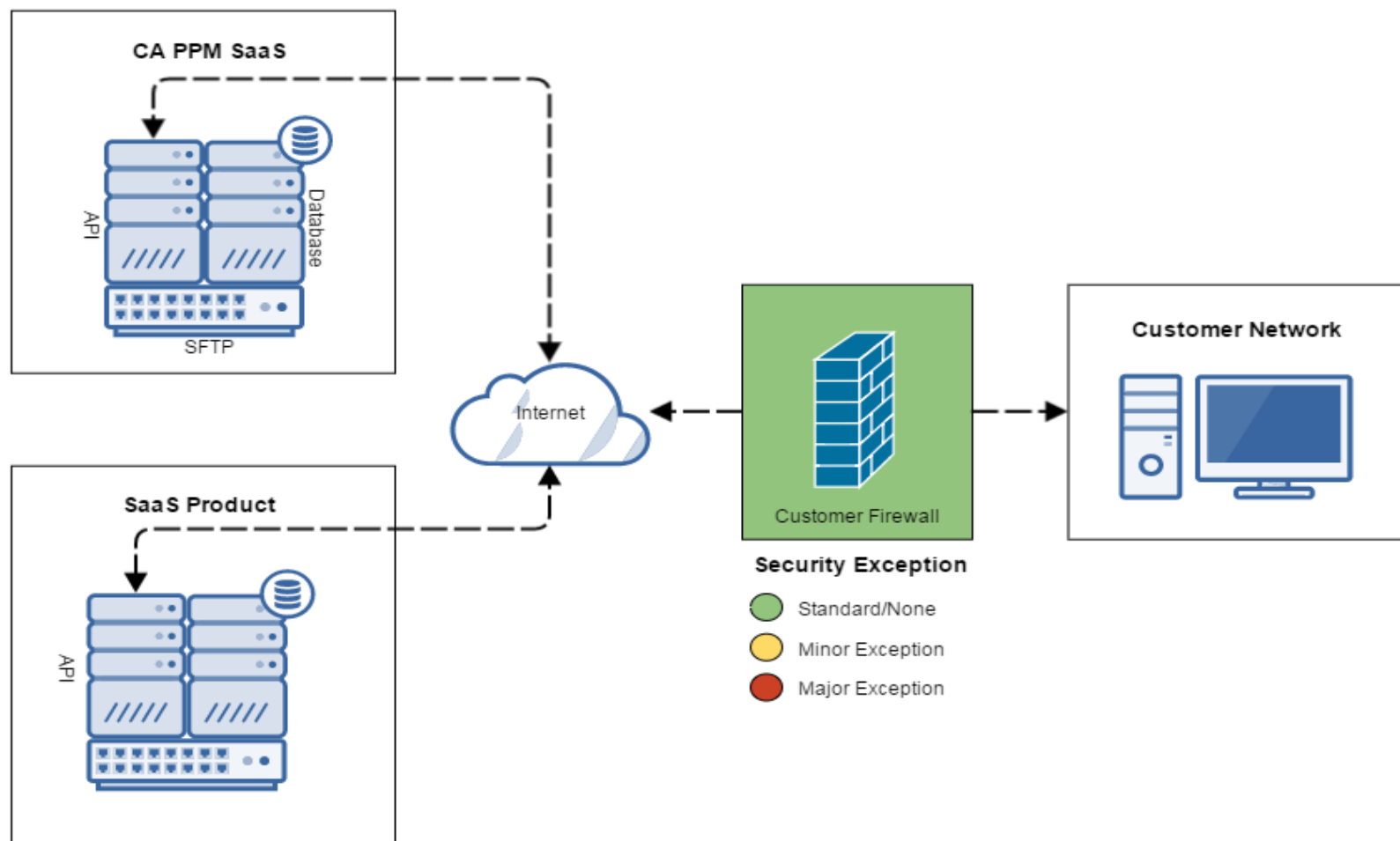
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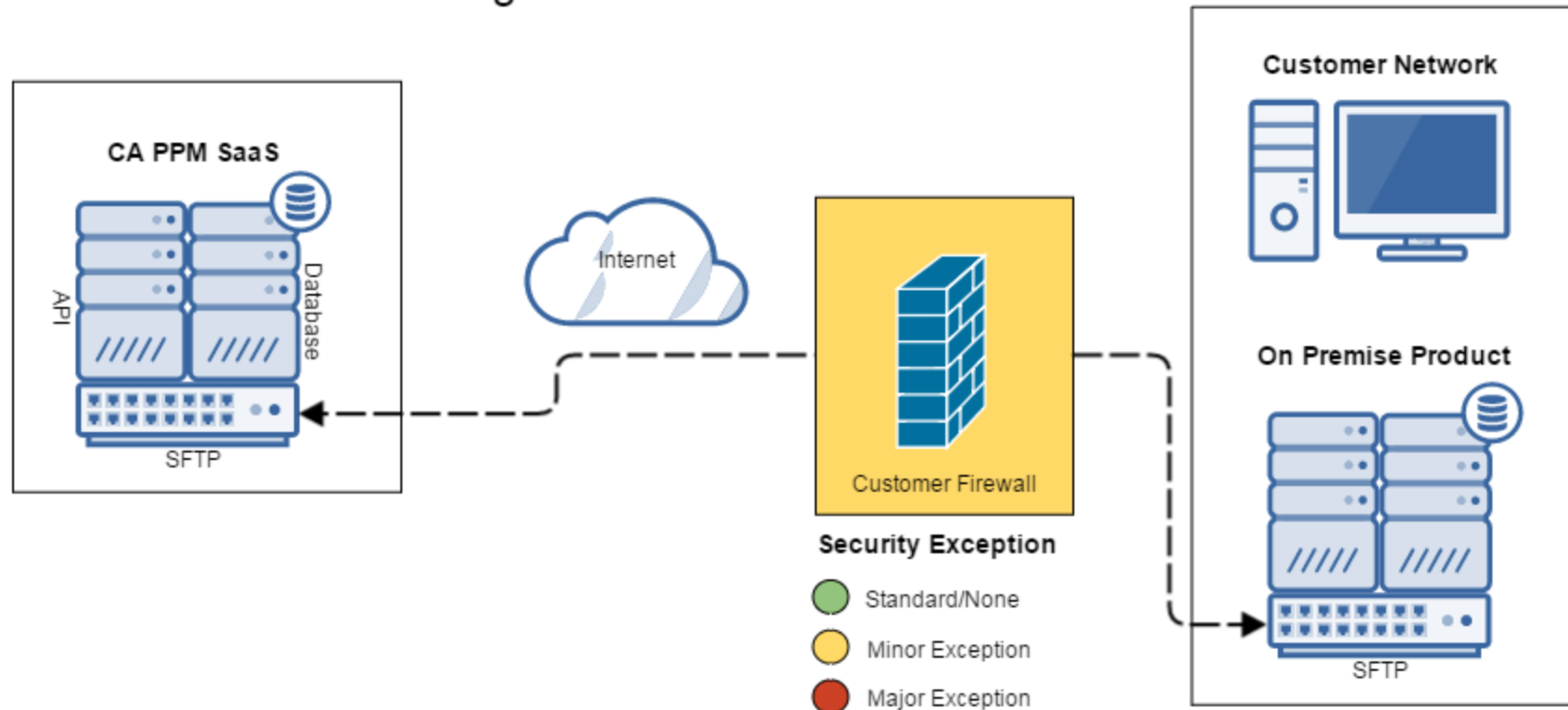
Part III:
Most Common Use Cases

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The wheel and spoke

Most Common Integrations

Import Interfaces
- HR/Resource/Portal
- Financials/Non labor
- Ideas
- Time
- Vendor

Export Interfaces
- Fieldglass/Contractor
- SAP/Finance
- Apptio
- Time
- Enterprise DWH

Clarity

Agile
- Jira
- Rally
- VersionOne
- MS TFS/VSTS

Uploaders
- Excel
- Cost plan
- Idea allocations
- Project Allocations

Business Applications
- SharePoint
- ServiceNow
- Smartsheet
- Trello
- Salesforce
- Transparent Choice
- Meisterplan

Rego Standard Agile Integration– 80% of implementations

- Govern and report from Clarity
- Execute in the Agile tool
- Customizable any workflow
- Connect to multiple Agile tools at once
- Optional - Agile workshop
  - Onsite or offsite

Content
Intro
• Kick-off
• Workshop purpose/agenda review
• How we'll do this
• Critical success criteria
Review
Objectives/Stories
• Review submitted user stories (if applicable)
Mapping
• Project level
• Task level
• Attributes
Financials
• How do we calculate costs
• How do we differentiate capital/operating costs if needed
Resources
• How might resources/staffing be handled

Content
Time tracking
• Are there any deviations needed to the standard connector time-tracking approach
Reporting
• What metrics are needed
• What views/reports are needed
Exception processes
• How do we handle exceptions (i.e. story moves from one project to another, etc.)
• What is an error vs a warning
Data migration approach
• To go-live, how will we establish all of the connections for existing projects
Conclusion
• Review open items/parking lot
• Review captured stories
• Discuss next steps

Agile Project List Lookup

Create Object in Clarity PPM

Create Tasks or import features

Time imported as an aggregation of the feature as a time entry

Clarity Interface

or

Project/Workspace

Epic

Features

Stories, tasks, assignments

Actual hours logged against the task

Part V:
Lessons Learned

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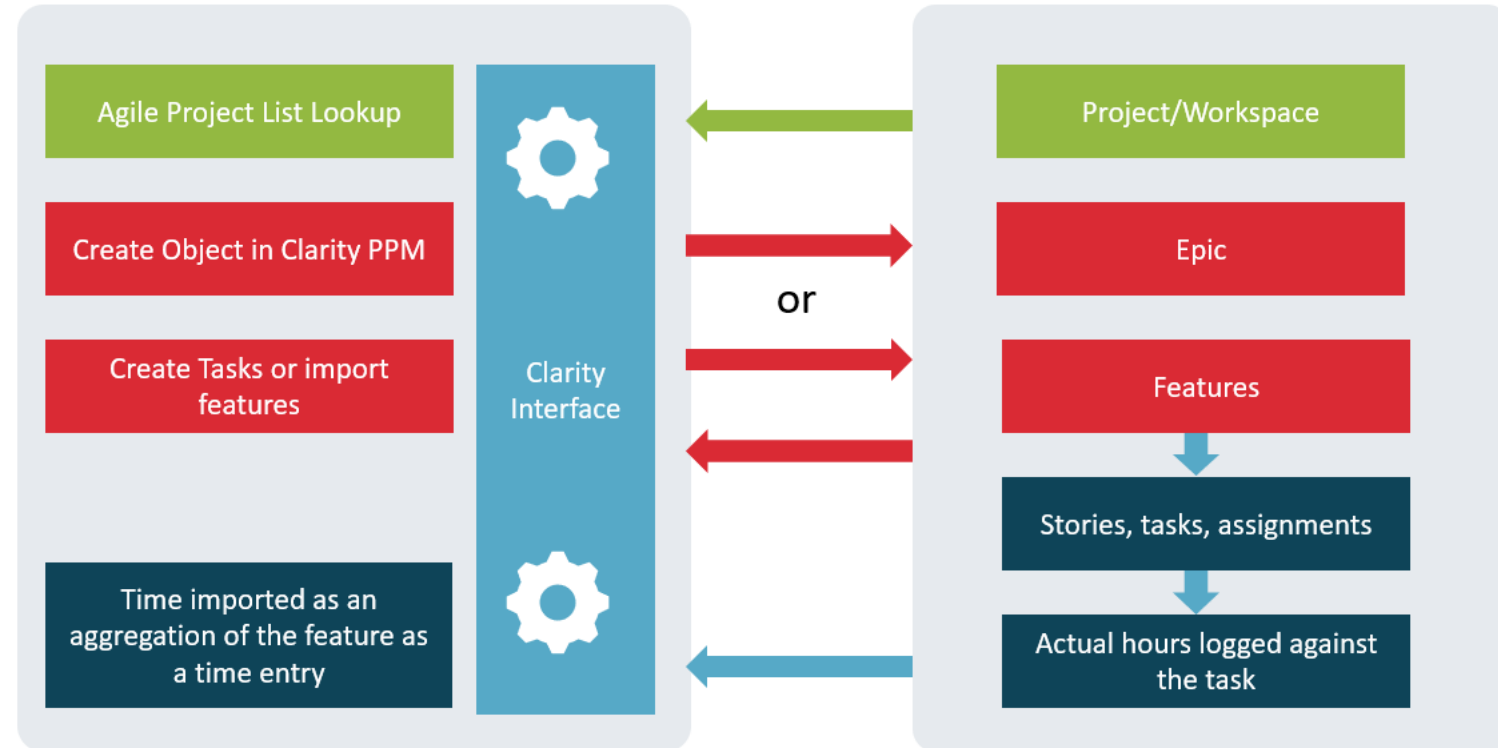
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Integration Guidelines

- Is there a Single Source of Truth (SSOT)?
  - Ensure that everyone uses the same data when making business decisions
  - Understand the accuracy and value of the source data
  - Differentiate between data creation/maintenance and data usage

- Is the process mature?
  - Integrations are built to match process
  - You must understand 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

Objective: Get More Out of your PPM Investment!

Error Handling & Testing

- Error handling / transaction management
  - Errors are inevitable when two different systems are being integrated
  - Plan to develop an error handing 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
    - Get a "win"
  - 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

Questions?

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- 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**

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