



# Northern Trust | Client Case Study

## Your Guides:

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# Part I: Introduction



Let Rego be your guide.

# Agenda

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- Introduction
- Clarity @ Northern Trust: Environment & Value
- Focus on Integrations

# Introductions

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- Northern Trust
  - Kevin O'Donnell, Clarity Product Manager
  - Carla Kelliher, Execution Delivery Architect
  - Jan Fair, Rego Client Engagement Lead



# Part 2:

## Clarity @ Northern Trust: Environment & Value



Let Rego be your guide.

# Clarity @ Northern Trust: Environment & Value

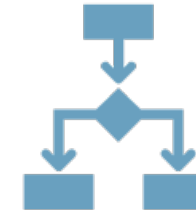
6



Leverage the Best-in-Class Clarity product capabilities

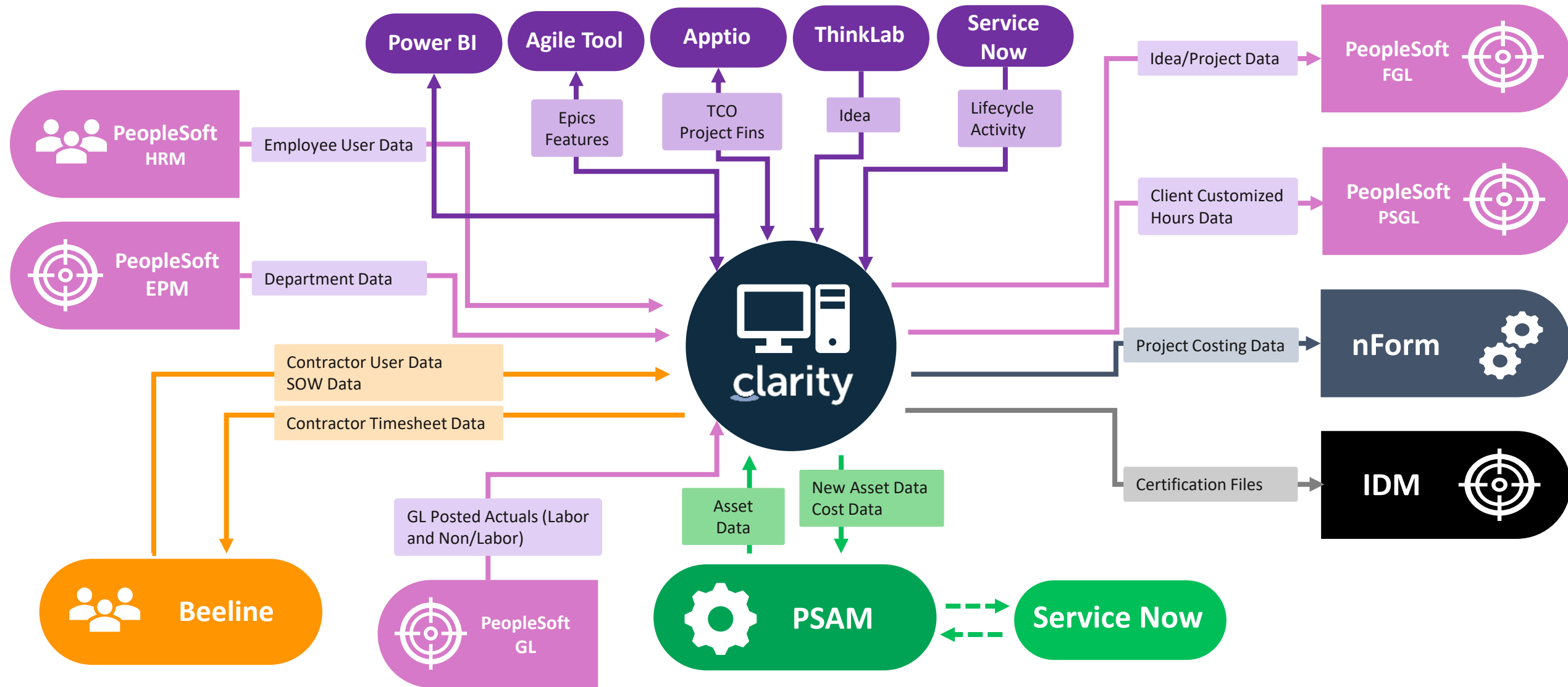
- Time Tracking
- Financial Management
- Portfolio Management / Demand Management
- Project Management / Execution
- Resource Management

Realize value in adapting legacy business processes to modern capabilities



Expand value by sharing information & being transparent in real time, with single source

# Northern Trust Clarity Integration Map



# Questions?



Let Rego be your guide.



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# Northern Trust Clarity Integration Detail

PeopleSoft HRM	Custom Process (In)
<p>Maintain roster of employee records sourced from HR</p> <ul style="list-style-type: none"> <li>One-step activation for time tracking or other role(s)</li> <li>Availability of all resources to assign roles on Investments such as Sponsors</li> <li>Automated control of Resource Class which drives Financial Costing of Employee tracked time</li> </ul>	<p>Using a text file feed supplied daily from HRM, Clarity creates and maintains accurate employee records.</p> <p>This includes calculation of the Clarity Resource Class which drives Clarity Financial costing of Employee time.</p>
Beeline	Custom Process (In)
<p>Maintain roster of contractor records sourced from Beeline</p> <ul style="list-style-type: none"> <li>One-step activation for time tracking or other role(s)</li> <li>Availability of all resources to assign roles on Investments such as Sponsors</li> <li>Automated input of Contractor rates to allow accurate Financial Costing of tracked time</li> </ul>	<p>Using a text file feed supplied daily from Beeline, Clarity creates and maintains accurate contractor records.</p> <p>The process creates Rate Matrix entries for Contractor rates so that Investment Labor costs are accurately calculated.</p>
PeopleSoft EPM	Custom Process (In)
<p>Load the NT Chart of Accounts into Clarity to populate Department OBS</p> <ul style="list-style-type: none"> <li>Cost centers for both Projects and Resources are assigned using the Department OBS</li> <li>Reporting rollup levels match the Finance organization</li> </ul>	<p>To ensure historical continuity, when Cost centers are retired, they are moved to a "Inactive" node in the OBS, never deleted.</p>
Beeline SOW	Custom Process (In)
<p>Track funding of Vendor contracts</p> <ul style="list-style-type: none"> <li>Early warning of when funding on a contract is running low</li> <li>Automated process to prevent over-spending on a vendor contract</li> </ul>	<p>NT imports (daily) the remaining funds on vendor SOW contracts. All timesheets are calculated for cost when submitted and compared to the remaining funds. Timesheets are rejected if funds are exhausted.</p>

# Northern Trust Clarity Integration Detail

PeopleSoft GL	Rego Data Processor (In)
<p>Give Project and Portfolio Managers up-to-date information about charges against their projects in one place- Clarity</p> <ul style="list-style-type: none"> <li>• PM's have budget vs. actuals available from the Clarity cost plan</li> <li>• Includes all costs, not just hourly labor, including milestone and fixed bid labor costs as well as Software, Hardware, Real Estate</li> </ul>	<p>NT imported Historical costs for all projects in the system to ensure a full picture of project costing for all projects in Clarity.</p>
Beeline Timesheet Feed	Custom Process / Rego Extractor (Out)
<p>Provide our Contractor partner, Beeline, with hours to build invoices</p> <ul style="list-style-type: none"> <li>• Daily feed of all approved hours provides accurate, timely reporting of all hours incurred</li> <li>• Any adjustments to hours are automatically included and corrected</li> <li>• Contractor assignment dates are validated</li> </ul>	<p>Overspend on Contractor assignments is not possible since assignment end dates are validated and rejected if in the past. Actual charges are calculated by Beeline including any discounts, taxes, etc. based on the feed of hours. Beeline invoices NT using the appropriate Capital or Operating GL accounts based on the designation of hours in the feed.</p>
PeopleSoft FGL- Projects and Ideas	Rego Data Extractor (Out)
<p>Maintain a list of valid open Ideas and Projects</p> <ul style="list-style-type: none"> <li>• Capital charges can only be logged to open, valid Ideas and Projects</li> <li>• This list is exported to Beeline and used to validate hourly data and build invoices</li> <li>• List is automatedly updated with new Ideas and Projects, while completed Ideas and Projects are dropped from the list</li> </ul>	<p>PeopleSoft maintains the list of Open, valid Ideas and Projects. When capital invoices are logged, the Project is checked against this list. Invoices for Capital charges cannot be entered unless a valid Idea or Project is present. Beeline uses this list, which includes the appropriate GL accounts, to build invoices for contractor labor.</p>

# Northern Trust Clarity Integration Detail

PeopleSoft FGL- Client Customized	Rego Data Extractor (Out)
Provide the Client Customized division with project costs <ul style="list-style-type: none"> <li>NT determines Client profitability by comparing the cost of Client Custom solutions against the contracts and prices paid</li> </ul>	The extract contains the costed amounts for both employee and contractor time spent on Client Custom solutions
PeopleSoft nForm	Rego Data Extractor (Out)
Calculate Department GL credits for Internally Developed Software <ul style="list-style-type: none"> <li>Supports NT accounting practice of crediting departments for the amount of hours/cost they spend building Internally Developed Software Assets</li> </ul>	The extract contains only employee costs; contractor costs are derived from the incoming invoices in GL.
Asset Management	Rego Data Extractor / Custom Process (Out)
Three-way integration between PeopleSoft Asset Management, Clarity, and ServiceNow keeps Asset Management and ServiceNow Configuration Management DB in synch with IT activity to create/enhance Software Assets <ul style="list-style-type: none"> <li>Single origination point in Clarity for new purchased or developed software, and for software enhancements.</li> <li>Supports NT in valuing Software assets for depreciation</li> </ul>	By using a system of Shell Assets NT is able to track costs of new Internally Develop Software Assets and costs of enhancing existing Software Assets.
IDM (Identity Manager)	Custom Process (In/Out)
Satisfy SOX requirements to track levels of permissions granted to Clarity users <ul style="list-style-type: none"> <li>Provides the ability to audit user levels and permissions</li> </ul>	-

# Northern Trust Clarity Integration Detail

Power BI Metrics & Dashboard	Rego Data Extractor (Out)
Supply our internally developed metrics solution with Project, Task, and Time data for various project management metrics	-
<ul style="list-style-type: none"> <li>Flexible, customizable metrics and Executive Reporting around IT activity</li> </ul>	
Agile Management (Azure Boards / Jira)	Rego Data Extractor & Rego Connector (In/ Out)
Move the IT organization further on the path to become an Agile organization by supporting synchronization of Epics and Features between Azure and Clarity.	The extract contains only employee costs; contractor costs are derived from the incoming invoices in GL.
<ul style="list-style-type: none"> <li>n/a</li> </ul>	
Apptio	Rego Data Extractor / Custom Process (Out)
Supply Clarity data to Apptio for enterprise financial reporting, TCO, Cost Transparency Project forecasting	-
<ul style="list-style-type: none"> <li>Enable Clarity as system of record for project forecasting</li> <li>Leverage &amp; share that data for robust enterprise financial reporting from Apptio</li> </ul>	
ThinkLab	Custom Process (In/Out)
Provide a channel for crowd-sourced Ideas to be created in Clarity for vetting and promotion to projects	-
<ul style="list-style-type: none"> <li>Leverage ThthinkLab crowdsourcing to enable easy Ideation to Clarity Demand Management processes</li> </ul>	