

*regoconsulting*

# RegoLink - Clarity

Microsoft Flow Connector



**ca** A Broadcom  
technologies Company

Winter 2019

# *rego*Link

Flow Connector



Seamless Integration and  
Automation to Office 365

# What is it?

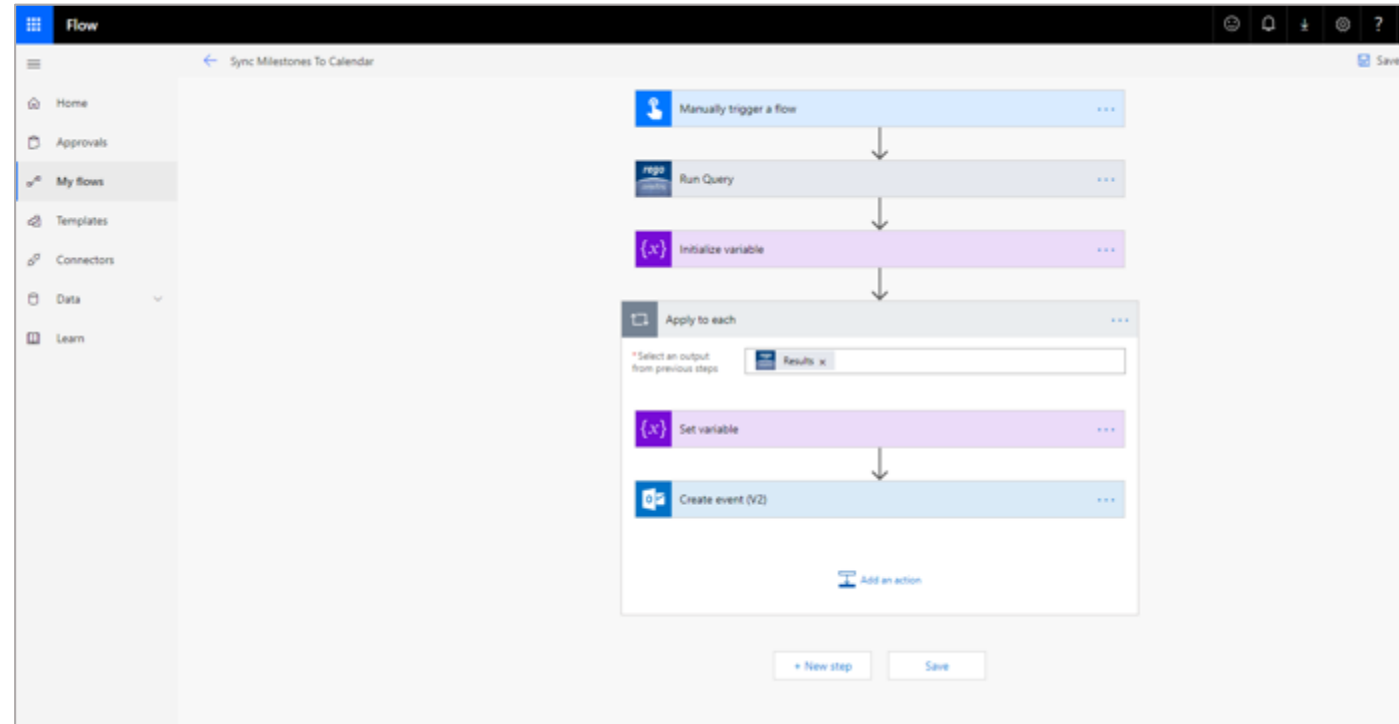
---

- Microsoft Flow
  - SaaS offering by Microsoft
  - Robust Workflow/Process based application
  - Allows you to automate and connect applications through actions and triggers
  - Simple to use UI
- Microsoft Flow Connector, allows you to:
  - Update or Create CA Clarity Object Instances
  - Synchronize CA Clarity data with Office 365 and vice versa.
  - Automate flows between Office 365, CA Clarity, and hundreds of connectors like Jira and Slack, among other applications
- Harness the power of flow for:
  - Integrations
  - Approvals
  - Notifications



# Simple to Use Interface

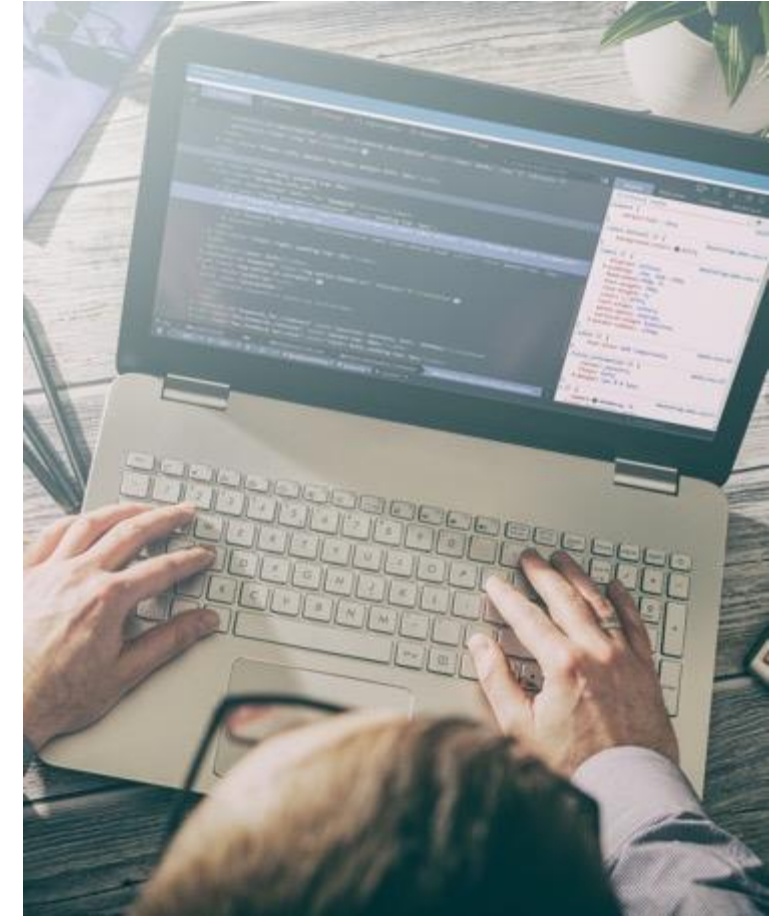
- Relies on Microsoft Flow:
  - Manage Approvals
  - Manage credentials
  - Analytics
  - Administrate your Flows, Templates, Permissions
  - Troubleshoot and Audit
  - Mobile and Desktop Applications
- Build Flows using only a UI, no coding required.



# Functionality

---

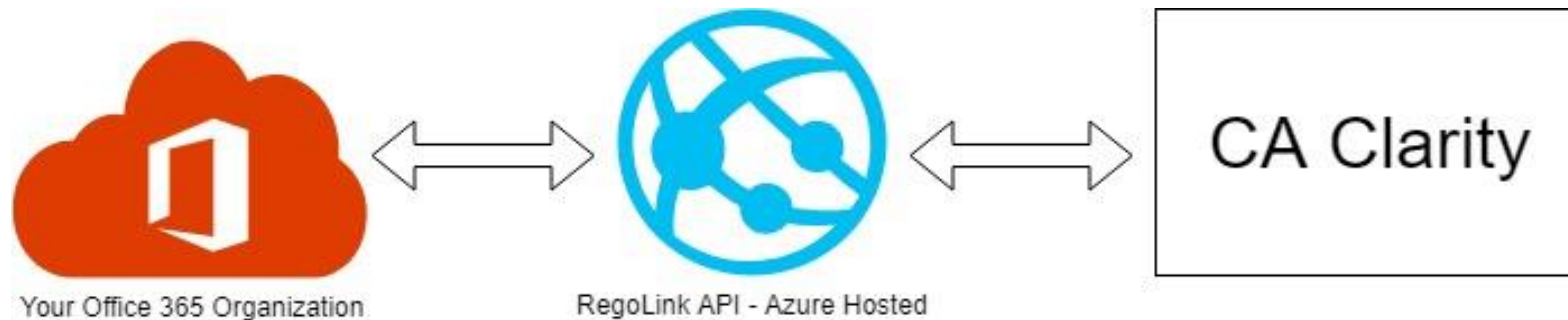
- Supports On Premise SharePoint (Office 365 Gateway) and Office 365
- Microsoft Flow Actions:
  - Validate Lookups: either to transform them into user friendly labels or webservice compatible values
  - Run Queries via XOG, and use the data returned in a Flow
  - Execute XOG Actions, like:
    - Update or create a Project
    - Create any XOG supported OOTB or Custom Object
    - Trigger a CA Clarity Process



# How It Works?

---

- The connector wraps around an API that allows you to communicate seamlessly
- This API allows the proprietary webservices to communicate with Microsoft Flow and Power Apps





# How It Works? - Execute Action

- From CA Clarity, restrict which actions your Flow users can execute via the CA Clarity UI. Defining which attributes they will be able to update
- On Flow, will allow you to select an action and define its mappings.
- Perform validations using its output to ensure the action ran as expected

Dynamic content Expression

Search dynamic content

- Execute Action Response (JSON)  
Execute Action Response (JSON)
- Failed  
Number of failure records
- Inserted  
Number of inserted records
- Messages  
Response warning messages
- Request  
Request XML definition
- Response  
Response XML
- Status  
Response Status (0: Failure - 1: Success - 2: Error)
- Total  
Total number of records
- Updated  
Number of updated records

RegoLink Flow Connector - Actions: Create/Update Project

+ Filter: System Default			
Parameter Sequence	ID	Name	Active
<input type="checkbox"/>	1	project_code	Project code
<input type="checkbox"/>	2	project_name	Project Name
<input type="checkbox"/>	3	description	Description
<input type="checkbox"/>	4	project_manager	Project Manager
<input type="checkbox"/>	5	start_date	Start Date
<input type="checkbox"/>	6	finish_date	Finish Date
<input type="checkbox"/>	7	is_active	Is Active

# How It Works? - Run Query

- By relying on NSQL Queries, a proven CA Clarity functionality you can:
  - Make queries permission aware
  - Make queries language aware
  - Use parameters
- On Flow, will allow you to define the parameters for your query. Which automatically exposes all the attributes and records available.

The screenshot shows the 'Get Project Info' configuration window in the Rego Consulting interface. It features a header with the 'rego consulting' logo and the title 'Get Project Info'. Below the header, there are three main configuration fields: 'Queries' with a dropdown menu set to 'RegoLink Flow - Project Info Calendar', 'param\_project\_code' with a text input field containing 'Project code' and a clear button, and 'Operation' with a dropdown menu set to 'Equals'. A 'Show advanced options' button is located at the bottom left of the configuration area.

The screenshot shows the 'Dynamic content' tab in the Rego Consulting interface. It features a search bar with the placeholder text 'Search dynamic content'. Below the search bar, there are four dynamic content items listed:

Dynamic content	Expression
rego Count	Number of items in the Results array
rego id	id
rego project_code	project_code
rego project_name	project_name



# How It Works? - Execute Action

- Validate lookups:
  - Using NSQL Queries
  - Static Lookups
- This allows you:
  - Transform values between their IDs and friendly labels.
  - Robust integrations, by transforming and validating data before performing any actions

The screenshot displays the Rego console interface for configuring an action. The title bar reads "Validate 'Project Manager' Lookup". The configuration fields are as follows:

* LookupType	NSQL Query
* Lookup	RegoLink Flow - Project Lookup Resources
* Operation	Equals
Label	Project Manager Value x
ID	Lookup ID

Below the configuration fields, there is a "Show advanced options" link. The interface also features a "Dynamic content" section with a search bar and a list of dynamic content items:

- Count**: Number of items in the Results array
- ID**: Item ID
- Label**: Item Label
- Validate Lookup Response (JSON)**: Validate Lookup Response (JSON)

# How It Works? - CA Clarity Webhooks

- RegoLink – Webhooks enhances CA Clarity to trigger Flows:
  - Automate from CA Clarity to Flow by triggering Flows based on process conditions.
  - Specifying which attributes will be available to be used in your flow
  - Supports one or multiple records, providing flexibility to:
    - Create processes trigger when an instance is created or meets a condition
    - Scheduled processes
    - And much more...

The screenshot shows the 'Properties' tab of the 'RegoLink Flow Connector - Webhook Configuration: Project Site - General - Properties' window. The 'General' section contains the following fields:

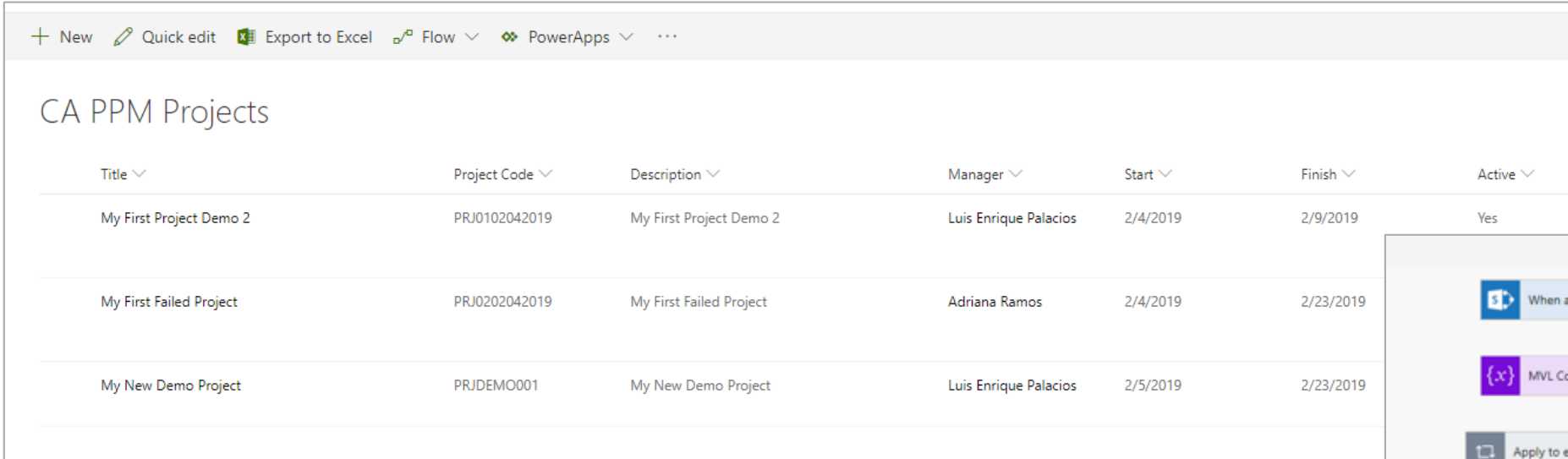
- ID:** FC-000001
- Name:** Project Site
- Active:**
- Request Template:**

```
{
  "project_id": "{code}",
  "project_name": "{name}"
}
```
- Webhook URL:** <https://prod-22.westus.logic.azure.com:443>
- SQL Statement:**

```
select code
, name
from inv_investments
where id = #OBJECTID#
```

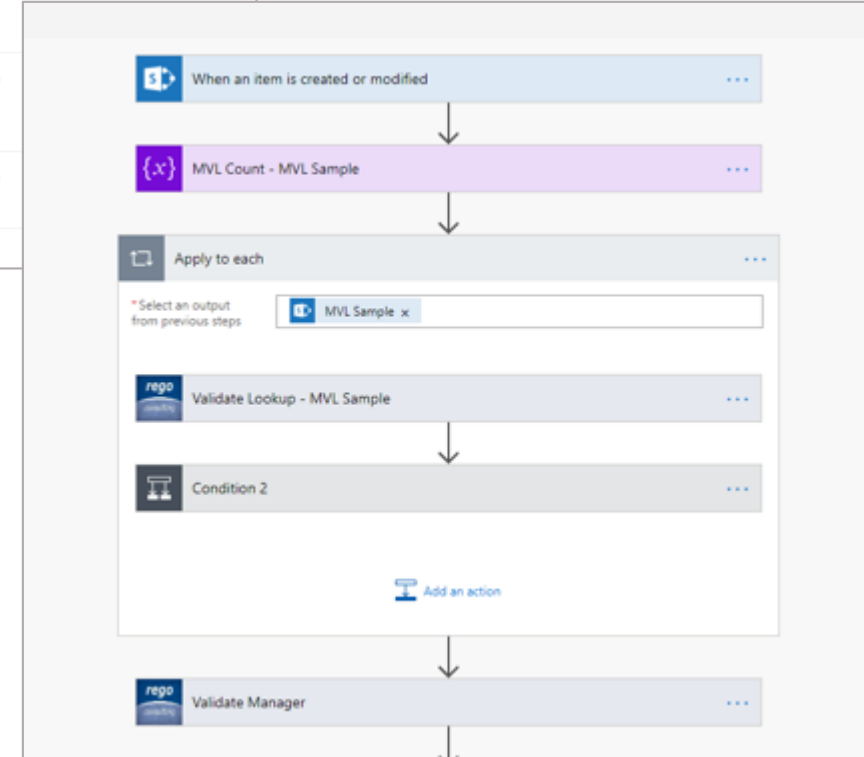
At the bottom of the window, there are three buttons: 'Save', 'Save And Return', and 'Return'.

# Examples – Bi Directional SharePoint Lists with CA Clarity



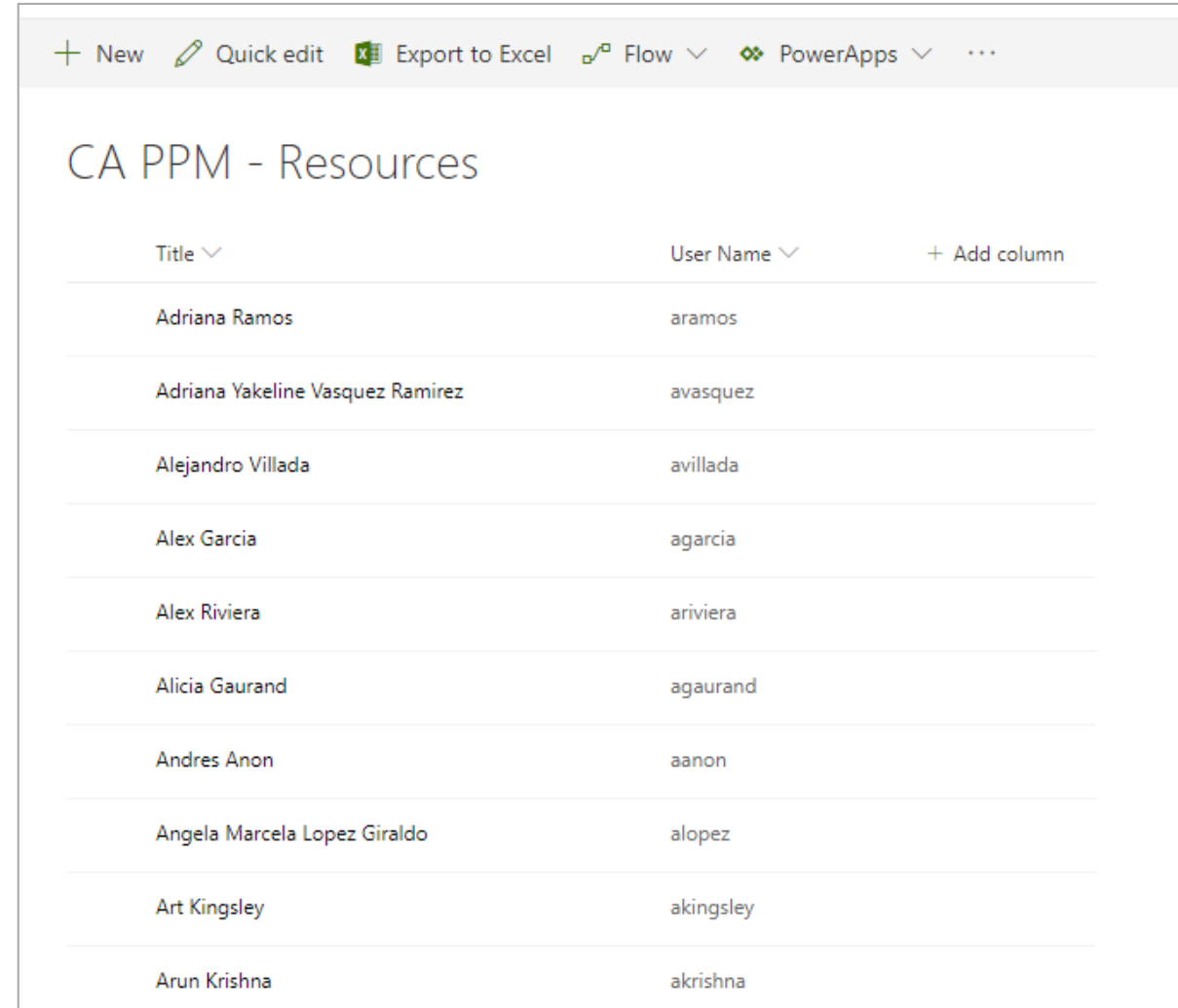
Title	Project Code	Description	Manager	Start	Finish	Active
My First Project Demo 2	PRJ0102042019	My First Project Demo 2	Luis Enrique Palacios	2/4/2019	2/9/2019	Yes
My First Failed Project	PRJ0202042019	My First Failed Project	Adriana Ramos	2/4/2019	2/23/2019	
My New Demo Project	PRJDEMO001	My New Demo 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



# Examples – Synchronize CA Clarity to SharePoint

- Allows SharePoint users to:
  - Build Lists
  - Update Groups
  - Create Sites
- Integrates with the Office 365 Ecosystem:
  - Outlook
  - SharePoint
  - Microsoft Teams
  - Among Others...



The screenshot shows a SharePoint list interface. At the top, there is a navigation bar with options: '+ New', 'Quick edit', 'Export to Excel', 'Flow', and 'PowerApps'. Below this, the list title 'CA PPM - Resources' is displayed. The list contains two columns: 'Title' and 'User Name'. The data rows are as follows:

Title	User Name
Adriana Ramos	aramos
Adriana Yakeline Vasquez Ramirez	avasquez
Alejandro Villada	avillada
Alex Garcia	agarcia
Alex Riviera	ariviera
Alicia Gaurand	agaurand
Andres Anon	aanon
Angela Marcela Lopez Giraldo	alopez
Art Kingsley	akingsley
Arun Krishna	akrishna

# 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

Tasks Only

Start  to

Finish  to

<input type="checkbox"/>	Task	Task ID	Start	Finish	Baseline Fini
<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

Critical

Milestone

Open for Time Entry

Power Filter [\[Build Power Filter\]](#)

# And Much More!

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





# Why RegoLink Flow Connector?

---

- With RegoLink Flow Connector:
  - Relies on Microsoft Flow to allow development of solutions to automate routine processes, allowing your applications to react based on triggering events.
  - Easily create new Flows or rely on existing templates.
  - Low code functionality drastically reduces development time. While making solutions more flexible and easier to modify.
  - Integrates seamlessly into its features and connectors.
  - Reduces the learning curve to support vs custom solutions.
  - Out of the box integration with 500+ third party applications and the Office 365 ecosystem.