

The background is a photograph of three hikers with large backpacks crossing a rocky stream in a mountainous area. The hiker on the right is wearing a red and black backpack, the middle one a black one, and the left one a black one with red pants. They are using trekking poles. The landscape features steep, rocky mountains with some snow patches and a clear sky. A complex, semi-transparent geometric overlay of white lines and polygons is present on the left side of the image.

*rego*University 2017

regoXchange | Content Review

Your Guide: Eric Taylor

Introductions

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



Introduction

regoXchange

regoUniversity 2017

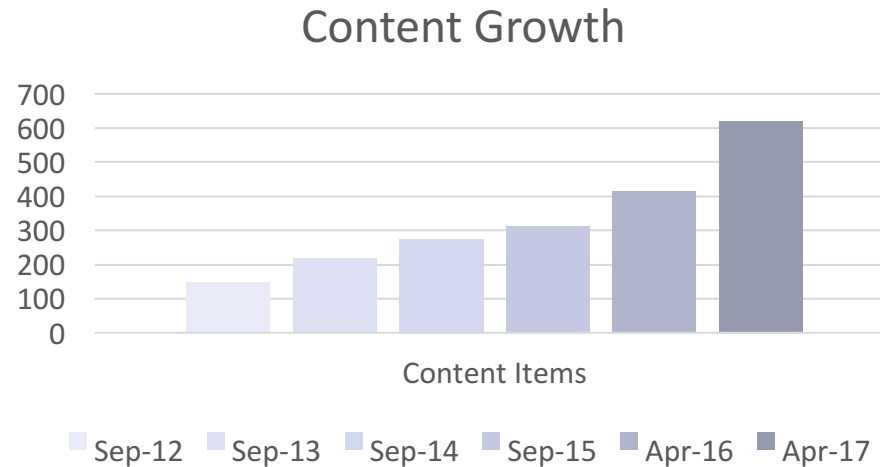
Let Rego be your guide.

- Quick Overview
- Content Highlights
 - Portlets
 - Workflow Processes
 - Training Content
- Xchange Plus
- Performance Service

Agenda

regoXchange: Quick Overview

- The regoXchange went live 4½ years ago and started with about 150 content items





- The user base consists of more than 1800 individuals representing more than 600 companies
- There are two content libraries, theBasiX (free content), and theWorX (available with subscription)


Quick Demo: Finding Content


- Let's quickly review the easiest ways to find content on the site


Work Categories



Application Management



Clarity Support



Demand

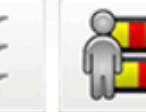

Financial Management



My Work Management

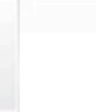

Portfolio Management


Product Management



Project Management



Quality Management



Resource Management



Time


Work Types

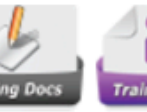

Configurations & Apps



Portlet



Presentation


Reports


Tech Trick


Training Docs


Training Video


Work Flow

Keyword

Search

Clear Filters

Need Help? Ask the Rego Librarian

Content Highlights

Portlets: Reviewing 27 of 190+

Portlets: All Action Items

REGO All Action Items

Assignee

Due Date From

Due Date To

AI Status

All

Filter

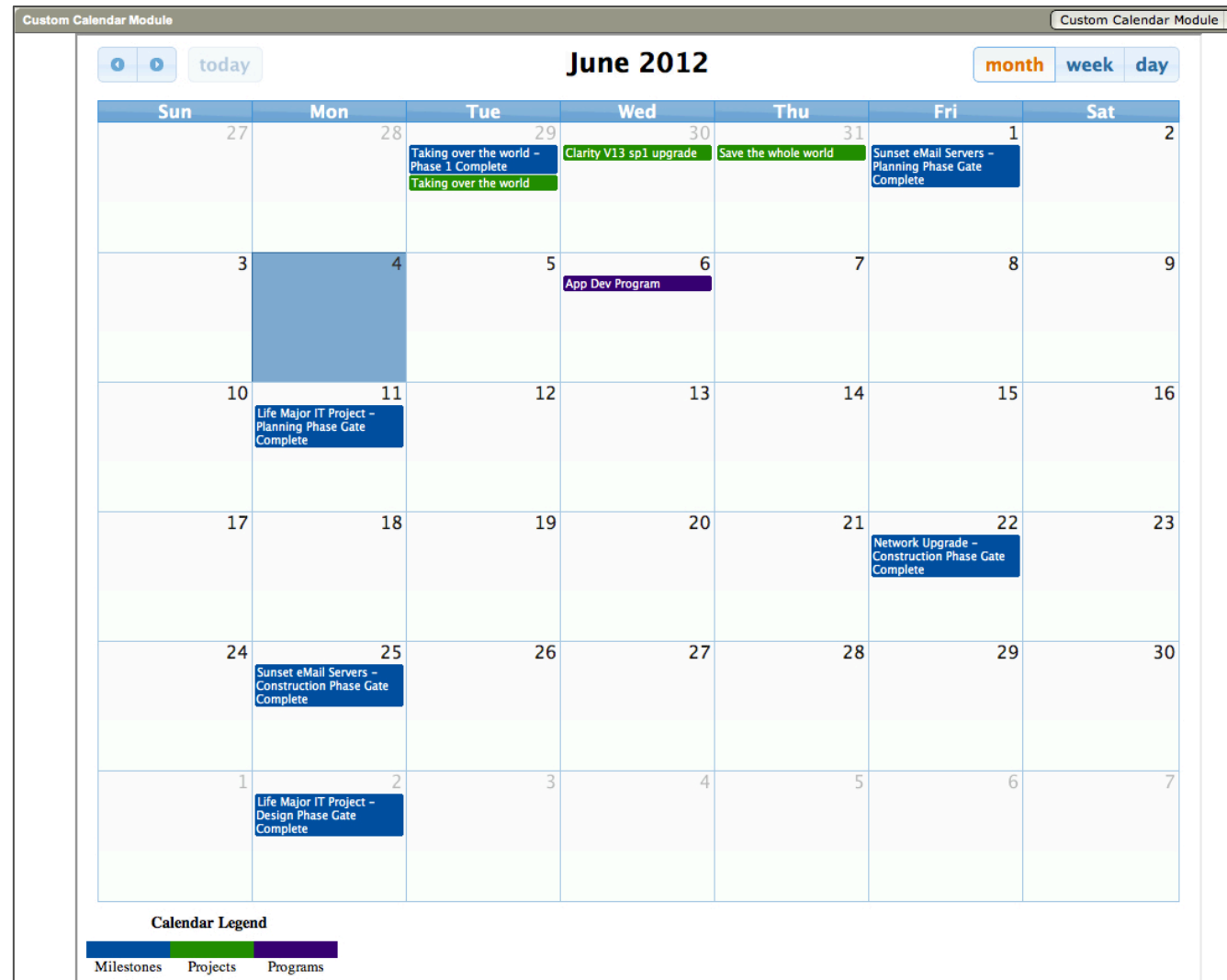
Show All

Save Filter

Clear

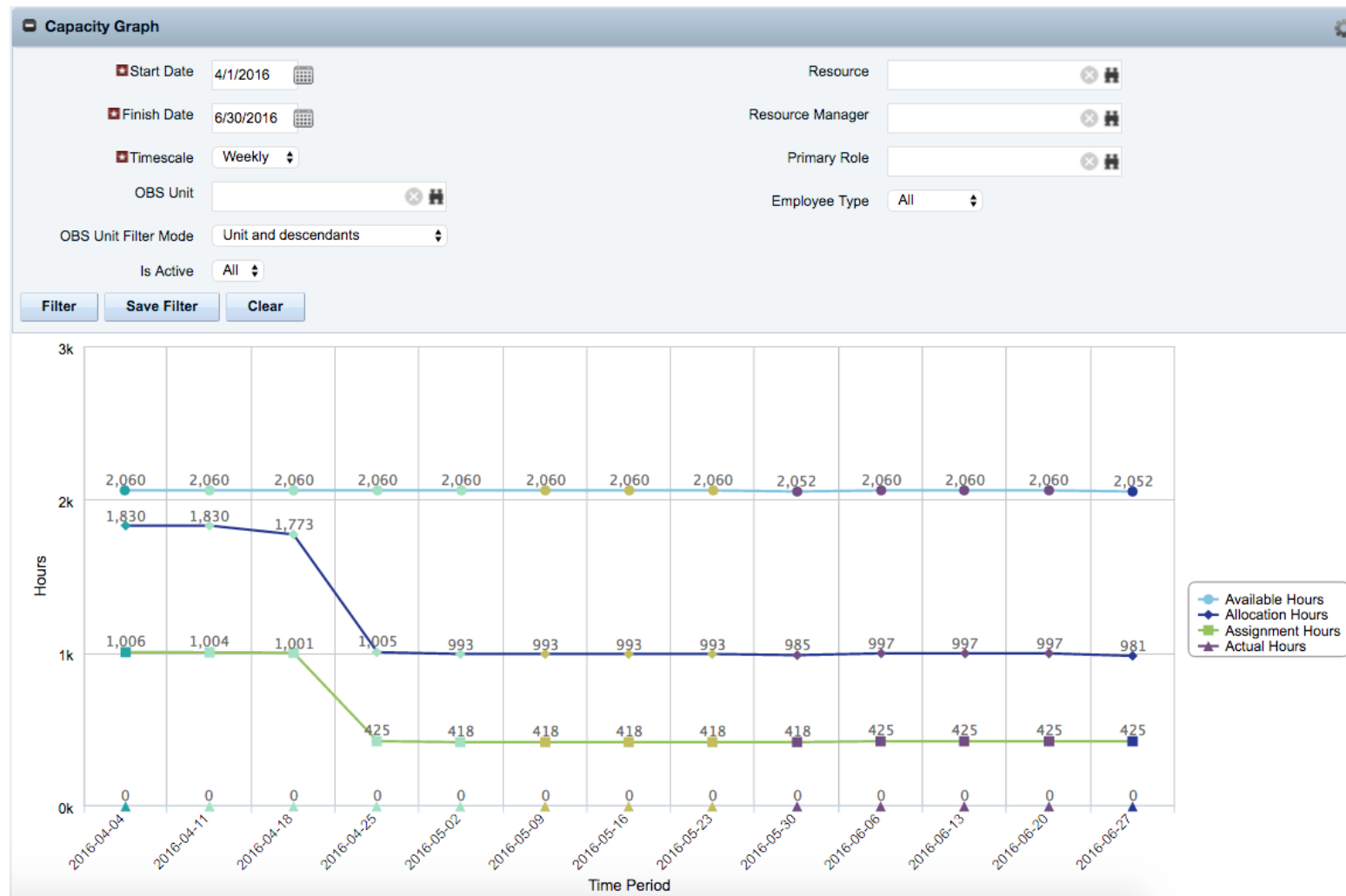
Action Item	Type	Assignee	Created By	Due Date	Health	Status ▲
Please review the project JH Test Cost Smoothing	Project	Hoaldrige, Jon	Hoaldrige, Jon	2/1/16	◆	Closed
Approve Timesheet	Timesheet	Hoaldrige, Jon	Hoaldrige, Jon	2/1/16	◆	Closed
Project Closure Survey Ready	Workflow	Hoaldrige, Jon	Administrator, Niku	4/18/16	◆	Closed
Project Closure Survey Ready	Workflow	Hoaldrige, Jon	Administrator, Niku	5/9/16	◆	Closed
Please review the project RA Test Project	Project	Agrawal, Rahul	Agrawal, Rahul	1/25/16	◆	Closed
Initial Discussions	Project	Group	Admin, Rego	3/2/15	✖	In Progress
Created Action Item	Personal	Wuenstel, Chris	Wuenstel, Chris	3/9/15	✖	In Progress
Approve Timesheet	Timesheet	Group	Joshi, Navdeep	2/8/16	✖	Open
Approve Timesheet	Timesheet	Group	Joshi, Navdeep	2/8/16	✖	Open
Approve Timesheet	Timesheet	Group	Joshi, Navdeep	2/8/16	✖	Open
Approve Timesheet	Timesheet	Group	Joshi, Navdeep	2/8/16	✖	Open
Approve Timesheet	Timesheet	Group	Joshi, Navdeep	2/8/16	✖	Open
Approve Timesheet	Timesheet	Group	Joshi, Navdeep	2/8/16	✖	Open

Portlets: Custom Calendar Module

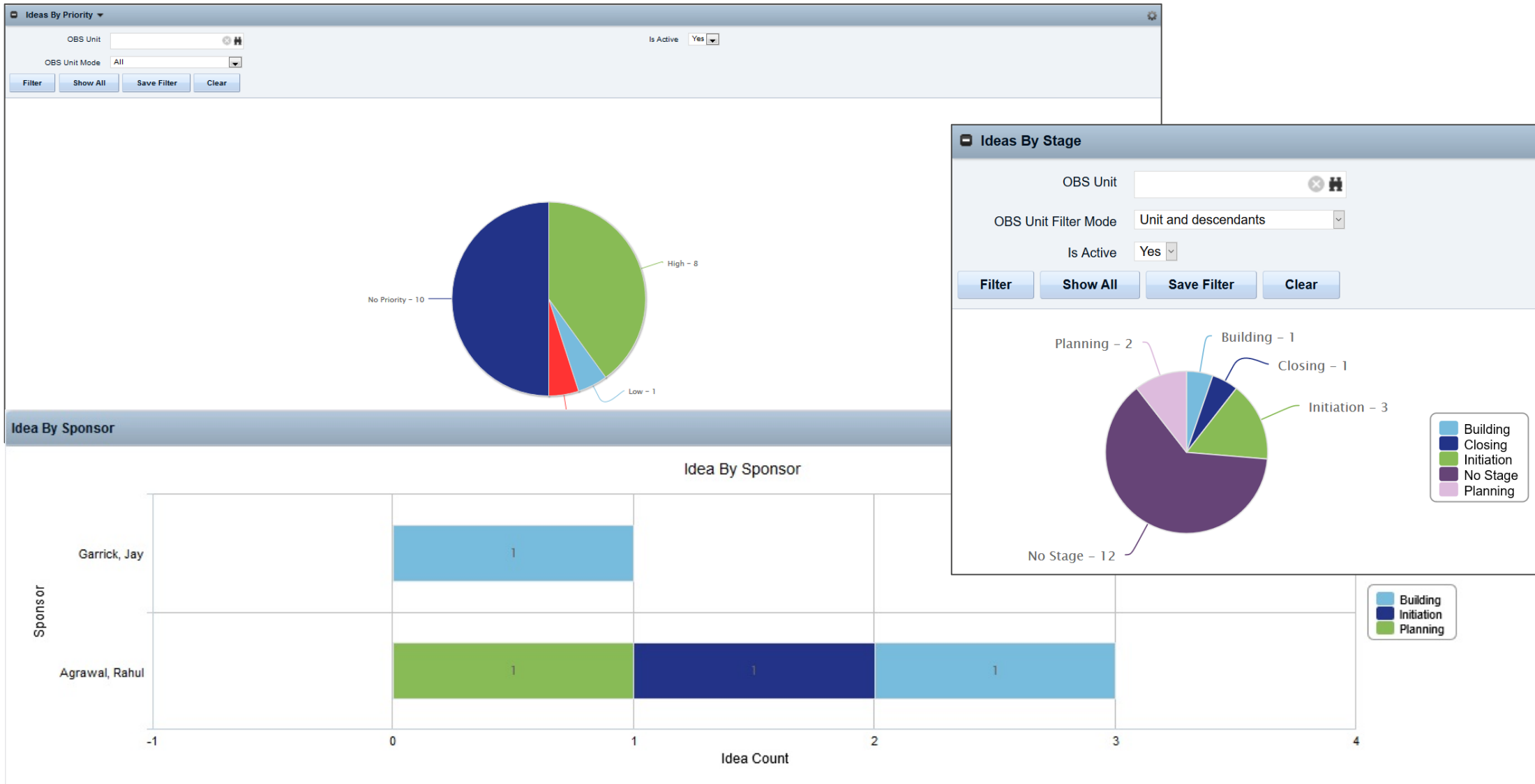


Portlets: Capacity Graph

10



Portlets: Ideas By Priority / Sponsor / Stage



Portlets: Milestone Task Dependency

Milestone Task Dependency

Project(s) Milestone Name

Project ID Project Active?

Project Name

Project ID	Project Name	Milestone Name	Dependency Count	Current Milestone Date	Earliest Dependency Date	Date Lag
PRJ0095	Test Project I	MS1	3	4/30/14	10/31/12	✖
PRJ0095	Test Project I	MS2	1	3/31/14	4/30/14	◆
PRJ0140	Build a Software Solution	Charter Approved	1	11/11/14	2/8/16	◆
PRJ0140	Build a Software Solution	Project Complete	1	1/10/15	4/24/15	◆
PRJ0144	Open super market	Plan approved	1	11/12/14	2/8/16	◆
PRJ0144	Open super market	Design approved	1	11/29/14	11/27/14	⚠










Displaying 1 - 6 of 6

Milestone Task Dependency Details

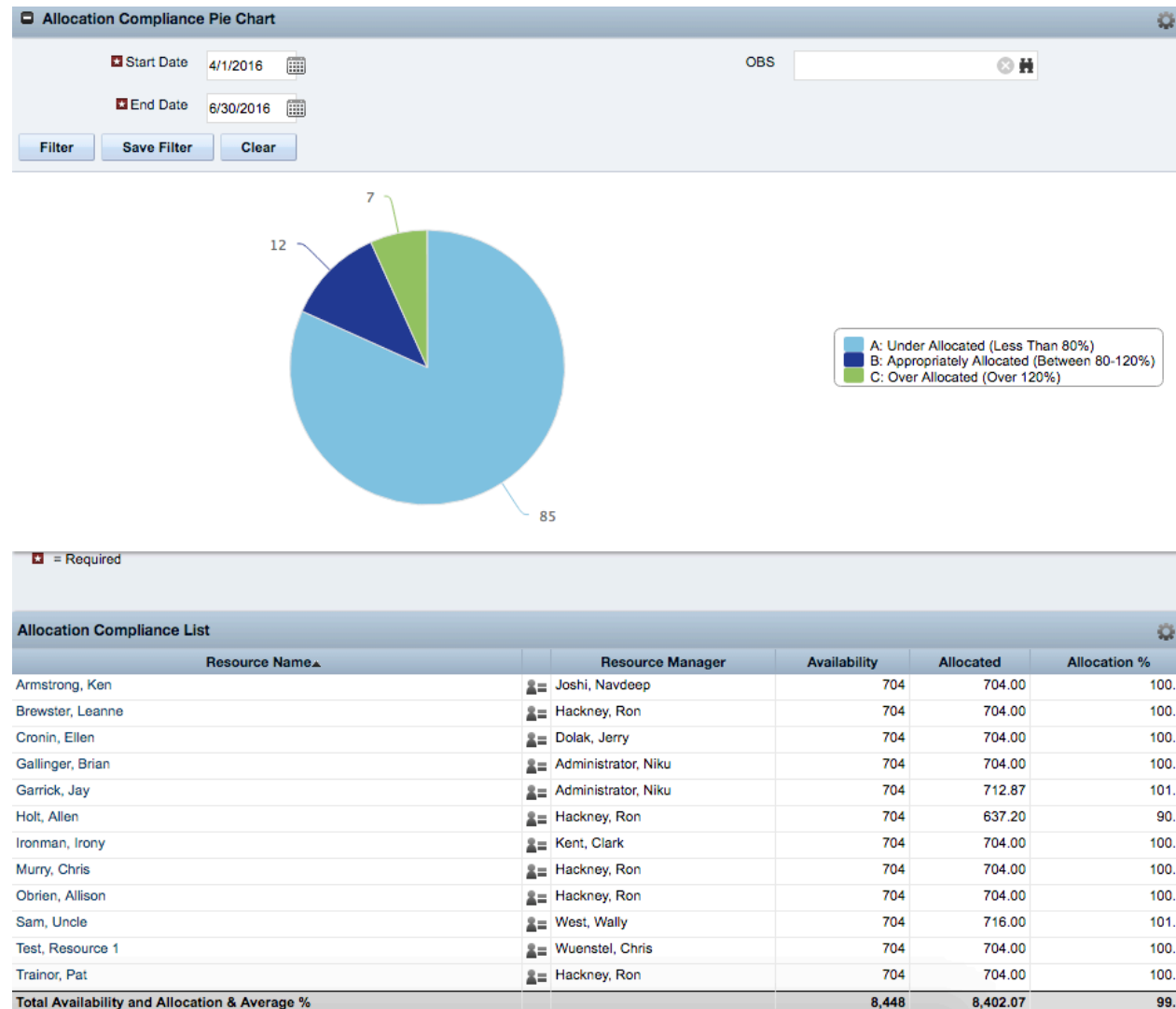
Project ID	Project Name	Milestone Name	Milestone Start	Milestone Finish	Predecessor Task Name	Predecessor Task Start	Predecessor Task Finish	Dependency Type	Date Lag
PRJ0095	Test Project I	MS1	4/30/14	4/30/14	Big Bang Theory Superhero Contest	10/29/12	4/18/16	Finish-Start	(719)
PRJ0095	Test Project I	MS1	4/30/14	4/30/14	Task 2 from OWB	8/21/13	8/30/13	Finish-Start	243
PRJ0095	Test Project I	MS1	4/30/14	4/30/14	Analysis of Test Runs	10/31/12	8/12/13	Start-Finish	546

Displaying 1 - 3 of 3

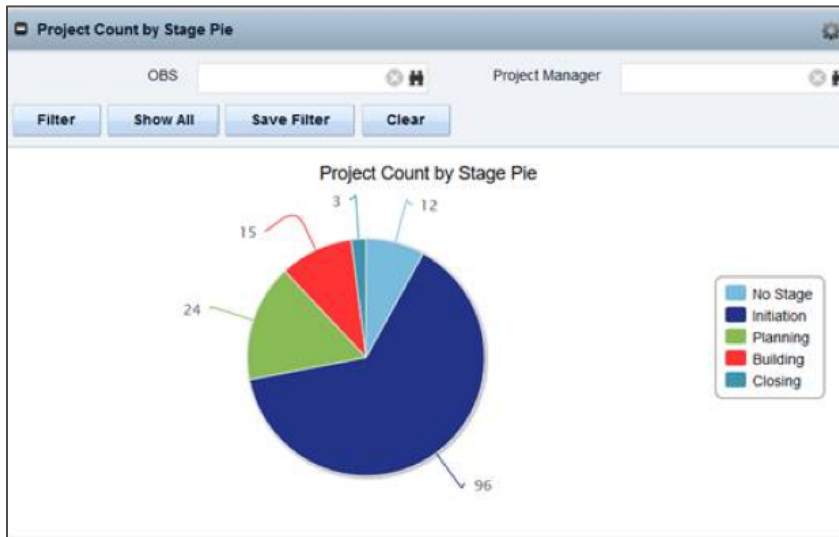
Portlets: Program Cost Plan Summary

REGO Program Costs 						
Period <input type="text" value="1/1/2016"/>  to <input type="text" value="1/31/2017"/> 						
Program <input type="text" value="All"/> 						
<input type="button" value="Filter"/> <input type="button" value="Show All"/> <input type="button" value="Save Filter"/> <input type="button" value="Clear"/>						
Program / Investments	Status	Percentage	Transclass	Actuals		
				Dec 2015	Jan 2016	Feb 2016
 Batman Program	Approved			738,000		
 Big Project Multiple Year [JS]	Approved	100%		138,000		
			Labor	71,760		
			N/A	66,240		
 Rebuild Wayne Manor	Approved	100%		600,000		

Portlets: Allocation Compliance Pie Chart with Drilldown



Portlets: Project Count By Stage w/ Drilldown



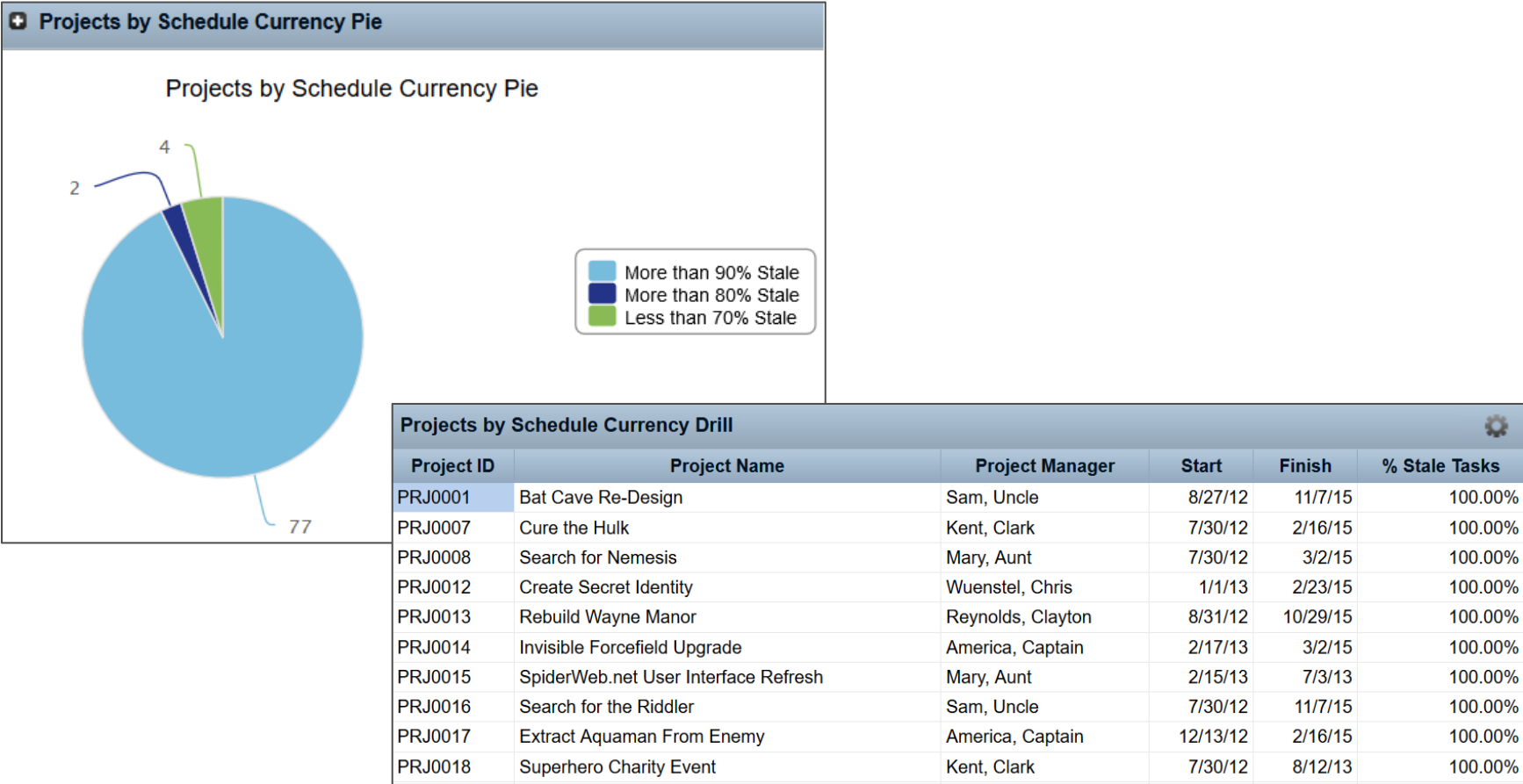
Projects by Stage Drill

Project ID	Project Name	Stage	Start	Finish	Project Manager
PRJ0014	Invisible Forcefield Upgrade	Planning	2/17/13	3/2/15	America, Captain
PRJ0019	Develop Transporters	Planning	10/29/12	9/2/13	Admin, Rego
PRJ0022	Big Bang Theory Superhero Contest	Planning	10/29/12	2/23/15	Spiderman, Spidy
PRJ0031	Upgrade Justice League Lounge Security	Planning	10/1/12	2/16/15	West, Wally
PRJ0043	CER Test Program	Planning	7/30/12	12/23/17	Reynolds, Clayton
PRJ0054	SN Test Project 2	Planning	8/1/13	12/31/13	Test, PM 1
PRJ0061	Training Project for Xchange Content	Planning	11/1/13	6/1/14	Schmenk, Ann
PRJ0068	Wachsmann	Planning	12/10/13	12/19/13	Wachsmann, David
PRJ0070	Sharepoint Project Name	Planning	12/13/13	12/13/14	Wuenstel, Chris
PRJ0077	sharepoint	Planning	1/7/14	1/7/15	Wuenstel, Chris
PRJ0078	Final Sharepoint Test	Planning	1/8/14	1/8/15	Wuenstel, Chris
PRJ0080	Sharepoint 3	Planning	1/9/14	1/9/14	Wuenstel, Chris
PRJ0137	RM TEST	Planning	10/30/14	3/13/15	Dolak, Jerry
PRJ0141	Build home	Planning	11/2/14	11/30/15	Reynolds, Clayton
PRJ0146	New great idea	Planning	10/28/13	4/21/14	Administrator, Niku
PRJ0185	Admin - Technical Environment Training	Planning	11/20/14	11/7/15	Wuenstel, Chris
PRJ0189	2015 Integration Project	Planning	2/25/15	8/21/15	Admin, Rego
PRJ0194	2015 Test Project	Planning	7/14/15	2/6/16	Admin, Rego
PRJ0203	test est	Planning	4/3/15	5/2/16	Administrator, Niku
PRJ0211	JAlmeida Test	Planning	4/10/15	5/31/15	Almeida, Joe

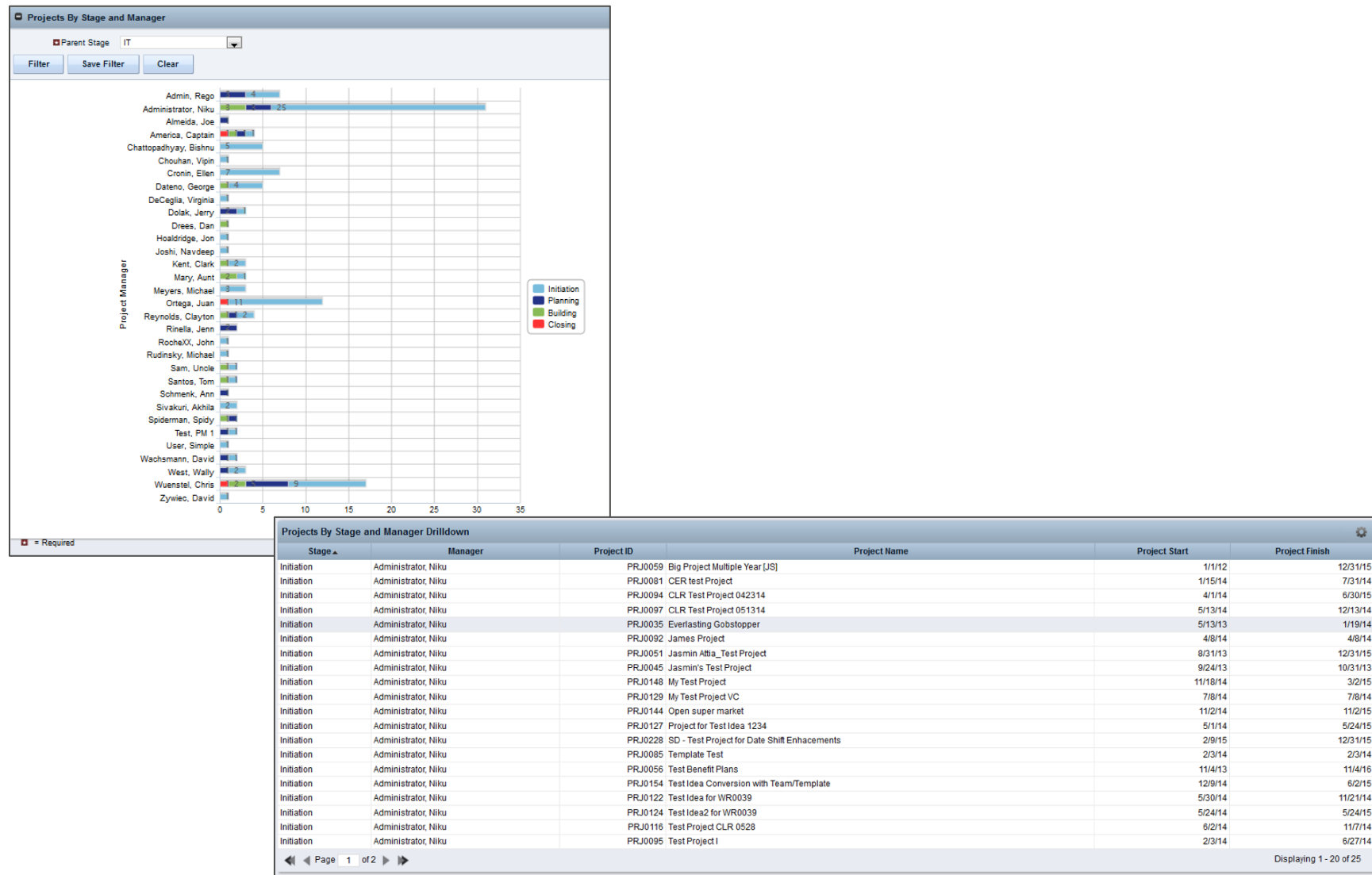
Page 1 of 2

Displaying 1 - 20 of 24

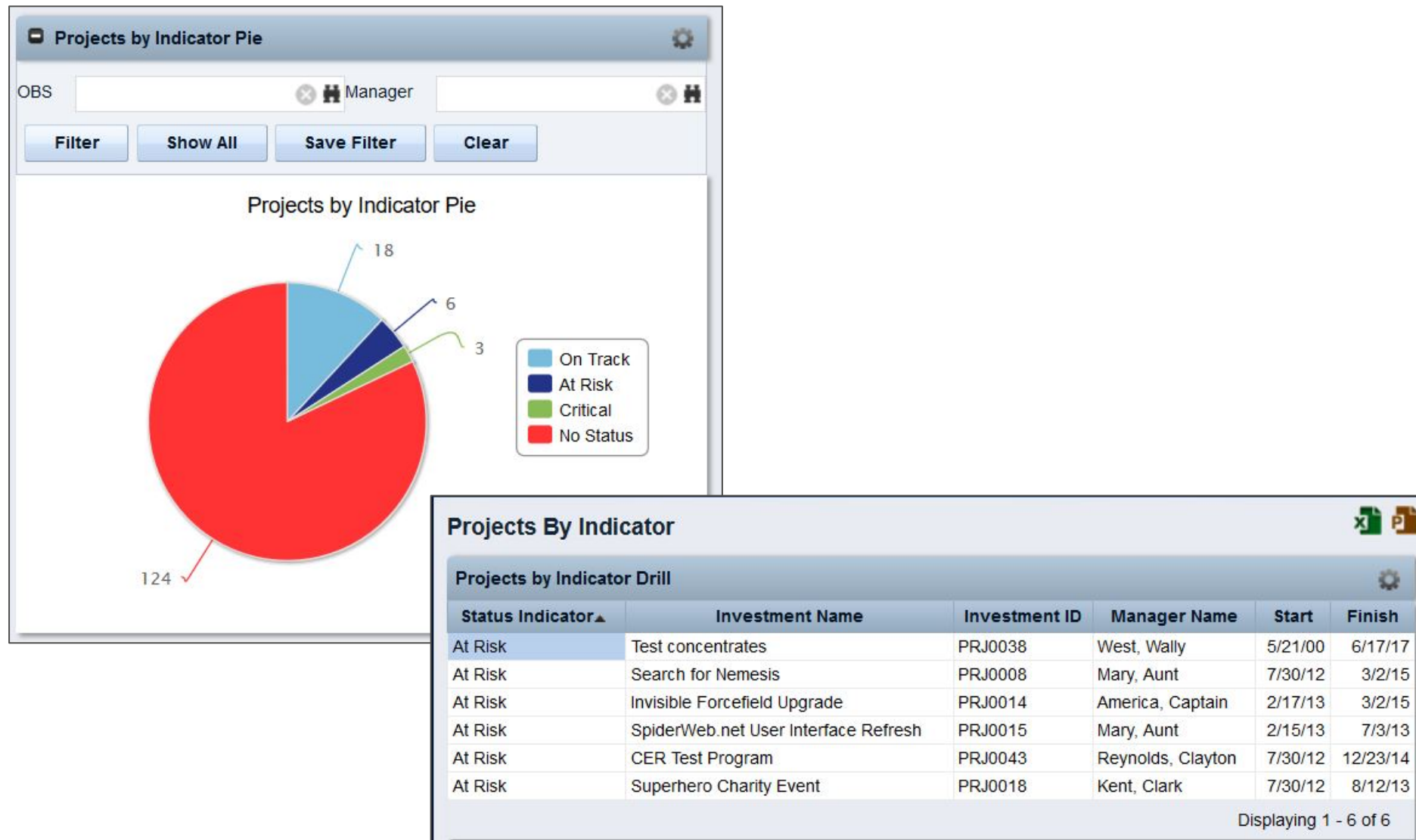
Portlets: Projects By Schedule Currency – Pie w/ Drilldown



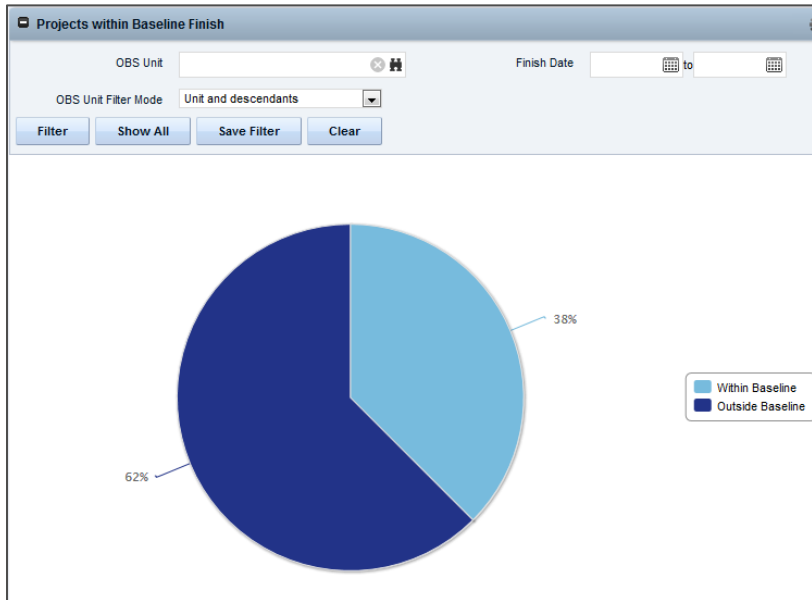
Portlets: Projects By Stage And Manager w/ Drilldown



Portlets: Projects By Status Indicator



Portlets: Projects Within Baseline Finish w/ Drilldown



Projects Within Baseline Finish Drill					
Baseline Category	Project ID	Project Name	Project Manager	Start	Finish
Within Baseline	PRJ0001	Bat Cave Re-Design	Sam, Uncle	8/27/12	7/8/15
Within Baseline	PRJ0005	Spiderman Training Program	Mary, Aunt	3/1/13	6/30/13
Within Baseline	PRJ0019	Develop Transporters	Admin, Rego	10/29/12	9/2/13
Within Baseline	PRJ0020	Ironman Wonder Woman Wedding	America, Captain	4/18/12	7/20/13
Within Baseline	PRJ0023	Make Clark Kent Cool	Kent, Clark	9/1/12	11/26/13
Within Baseline	PRJ0095	Test Project I	Administrator, Niku	2/3/14	6/27/14
Within Baseline	PRJ0193	Wiki Service Improvement	Admin, Rego	2/3/15	7/22/16
Within Baseline	PRJ0216	Advanced Capabilities Enhancement	Dateno, George	4/22/15	6/30/16
Within Baseline	PRJ0242	A JR Material Test	Rinella, Jenn	8/1/15	12/31/15



Displaying 1 - 9 of 9



Portlets: Proposed Estimates vs. Task Estimates

Proposed Estimates vs Task Estimates



Investment Name:

Investment ID:

Project OBS Unit:  

Project OBS Unit Filter Mode:  

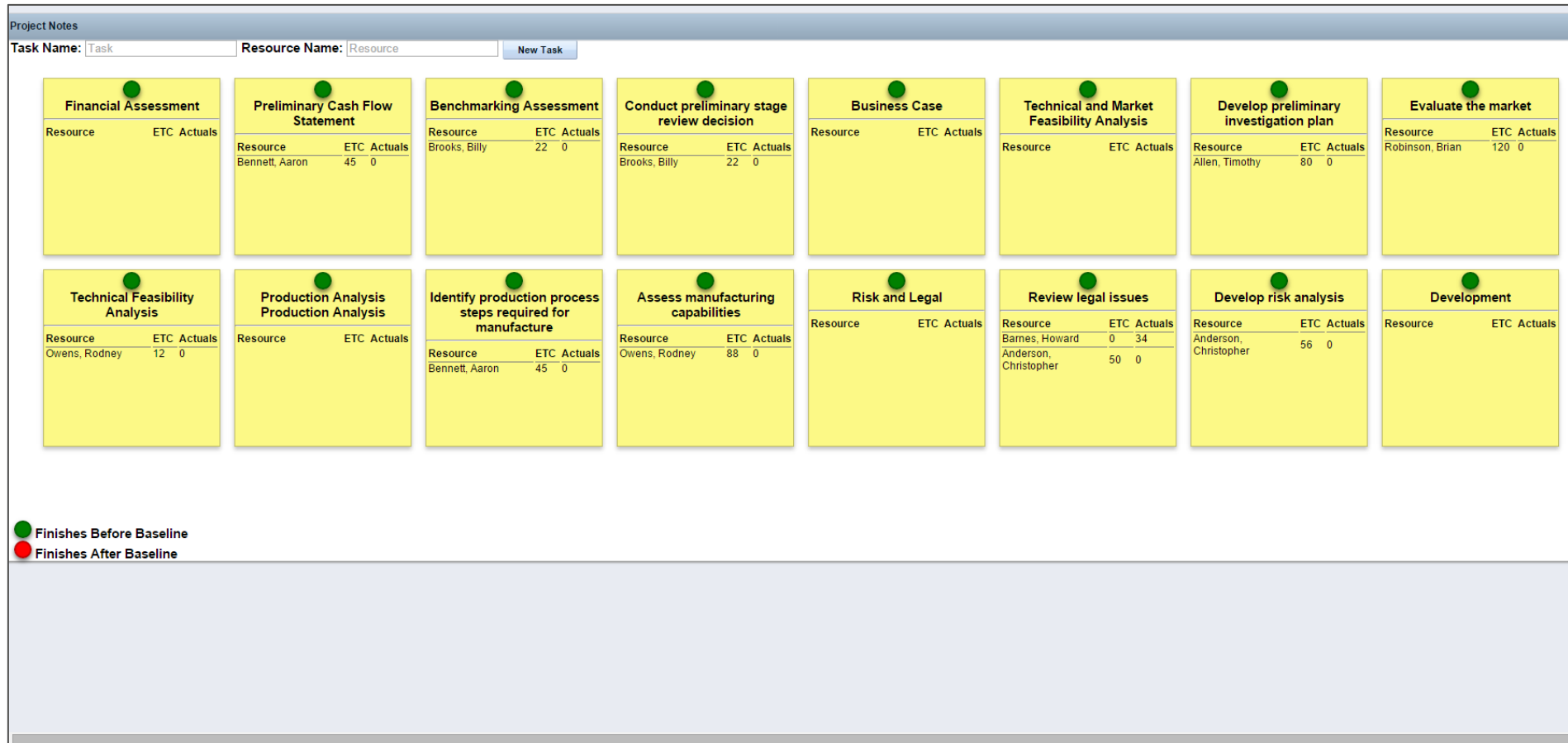
Investment Active:

Investment Manager:  

Proposed ETC Greater Than Task ETC:

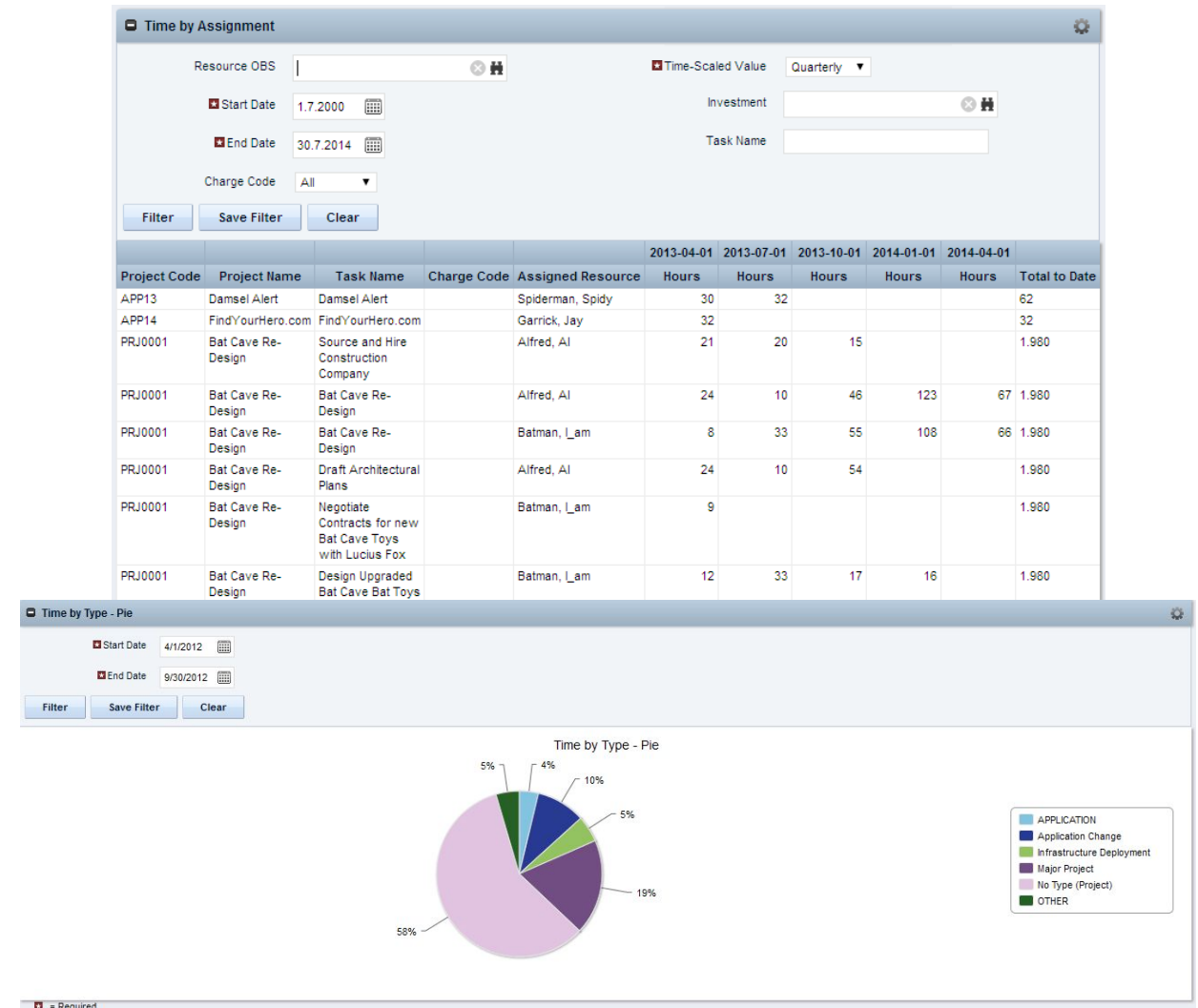
Investment Name	Investment ID	Investment Active	Investment Start	Investment Finish	Task	Resource	Resource Active	Resource Manager	Total Actual Hours	Proposed ETC > Task ETC	Total ETC Hours	Pending Actual Hours	Proposed ETC Hours
Bat Cave Re-Design	PRJ0001	✓	8/27/12	9/2/13	Bat Cave Re-Design	Alfred, Al	✓	Kent, Clark	27.00	✓	5.70	60.00	500
Bat Cave Re-Design	PRJ0001	✓	8/27/12	9/2/13	Bat Cave Re-Design	Batman, Lam	✓	Spiderman, Spidy	17.00		335.00	103.00	
Bat Cave Re-Design	PRJ0001	✓	8/27/12	9/2/13	Bat Cave Re-Design	Garrick, Jay	✓	Administrator, Niku	40.00		496.00	276.00	

Portlets: Task At-A-Glance Dashboard



Portlets: Time by...

- Time by Assignment
- Time by Investment
- Time by Resource
- Time by Resource and Investment
- Time by Stage and Timescale
- Time by Task
- Time by Task Stage
- Time by Type – Pie Chart



Portlets: Timesheet Audit

Resource

Resource ID

OBS Unit

OBS Unit Filter Mode

Unit and descendants

Resource Manager

Timesheet Status

All

Project

Task

Start Date

2/1/2016

Finish Date

2/7/2016

Filter

Save Filter

Clear

Resource	Resource ID	Resource Active	Resource Open For Time	Time Period	Timesheet Status	Is Adjustment	Timesheet Modified Date	Timesheet Posted Date	Timesheet Submitted By	Timesheet Approved By	Project	Task	Proposed ETC Hours	Pending Actual Hours	Total Actual Hours	Total ETC Hours	Timesheet Hours
America, Captain	captain_america		✓	02/01/2016 - 02/07/2016	Posted		2/4/16	2/4/16	Joshi, Navdeep	Administrator, Process	Bat Cave Re-Design	Bat Cave Re-Design		0.00	30.00	1,688.50	10.00
America, Captain	captain_america		✓	02/01/2016 - 02/07/2016	Posted		2/4/16	2/4/16	Joshi, Navdeep	Administrator, Process	Infrastructure Deployment Project	Project Costs by Vendor		24.00	62.00	0.00	10.00
America, Captain	captain_america		✓	02/01/2016 - 02/07/2016	Posted		2/4/16	2/4/16	Joshi, Navdeep	Administrator, Process	Akhila's XOGGED Project	test		0.00	30.00	0.00	10.00
America, Captain	captain_america		✓	02/01/2016 - 02/07/2016	Posted		2/4/16	2/4/16	Joshi, Navdeep	Administrator, Process	Big Project Multiple Year [JS]	Big Project Multiple Year [JS]	1,319.00	57.00	100.00	1,625.60	10.00
Armstrong, Ken	kena		✓	02/01/2016 - 02/07/2016	Posted		2/4/16	2/4/16	Joshi, Navdeep	Administrator, Process	Infrastructure Deployment Project	Project Costs by Vendor		0.00	305.00	500.00	20.00

Portlets: Timesheet Compliance Summary

Overview: Portlet Test1

Timesheet Compliance Summary

☒ Start Date: 6/1/2016 
☒ End Date: 7/10/2016 
☒ OBS: 
☒ OBS Type: Resource OBS 

OBS Path	Noncompliant Resources	Compliant Resources	Resources 	PCT Resources Compliant	Availability Hours	Actual Hours	Actual Days	Missing Hours	Entered Days	Entered Hours	Overtime Hours (by week)	PCT Hours Compliant	Noncompliant Timesheets	Compliant Timesheets	Unsubmitted Timesheets	Submitted Timesheets	Total Timesheets	PCT Timesheets Compliant
Unit1	5	0	5	0.0%	975	0	0	975	0	0	0	0.0%	25	0	25	0	25	0.0%

☒ = Required

Displaying 1 - 1 of 1

Portlets: Timesheet Compliance Portlet Suite

Timesheet Submission Compliance by RM				
Timesheet Submission Compliance by OBS				
Timesheet Approval Compliance by RM				
Timesheet Approval Compliance by OBS				
Timesheet Compliance: Timesheet Submission Compliance by RM				
Timesheet Submission Compliance by RM				
Resource Manager	Timesheets Not Compliant (as of Monday 12PM EST)	Total Timesheets Required (as of Monday 12PM EST)	Current Week Compliance Percentage (as of Monday 12PM EST)	Jun 08
Abbiati, Stefano	2	2	0	100
Adams, John	0	13	100	100
Akella, Prasad	0	7	100	71
Alcayna, Salvador	0	11	100	82
Alfaro, Eric	2	7	71	71
Anderson, Paul	3	10	70	60
Aniruddha Mascreeen, Naveen	1	1	0	0
Appelgren, Christophe	0	3	100	100
Armstrong, Don	8	8	0	0
Assam, Youcef	0	8	100	100
Augier, Isabelle	4	9	56	89
Ayewa, David	1	7	86	86
Badowski, Jeff	0	2	100	100
Ballekens, Joeri	0	9	100	89
Bantle, Mirko	0	5	100	100

Content Highlights

Workflow Processes: Reviewing 13 of 60+

Workflows: Action Items Overdue Stalker Email

Resource: Scarlato, Jennifer

Resource Manager: Scarlato, Jennifer

You are receiving this email because you have at least one Action Item(s) Open with Due date past:

Action Item	Description	Status
Test AI	Test AI	Open

Your name will continue to appear on exception reports provided to management until the Action Item it is Open or Work in Progress after the Due Date.

This is an automated message. Please do not reply.

Workflows: Pending Contractor Termination Stalker

clarity@regoconsulting.com clarity@regoconsulting.com via amazonses.com
to me ▾

Resource Manager: Arya, Vishal

The contracts for the following resources will terminate on the identified date:

Resource	Termination Date	Email
Armstrong, Ken	12/03/2015	ken.armstrong@regoconsulting.comZZZZZZZZZZZZ
Alfred, Al	14/03/2015	regopm@gmail.comZZZZZZZZ
Allen, Barry	20/03/2015	flash@example.comZZZZZZZZ
Banner, Bruce	13/03/2015	regouser@gmail.comZZZZZZZZ

...

Technical issues should be reported to Clarity administrators. Thank you in advance for your time and attention.

This is an automated message. Please do not reply.

Workflows: PM Stalker Projects Past Due

clarity@regoconsulting.com

clarity@regoconsulting.com

3:08 PM (8 minutes ago)

☆

↩

▼




to me ▼


Clark,

The following project(s) that you manage have been identified as being active and past the scheduled finish date.

ID	Project Name	Scheduled Finish
PRJ0007	Cure the Hulk	09/29/2013
PRJ0018	Superhero Charity Event	08/12/2013
PRJ0023	Make Clark Kent Cool	11/26/2013

Workflows: Project Compliance Stalker (PM)

Clarity - Project Compliance  Inbox x  

 **clarity@ca.com** <clarity@ca.com> 1:53 PM (1 minute ago) ☆ << >>
to chris ▾

Project Manager: Wuenstel, Chris

You are receiving this email because at least one project currently assigned to you has data that is out of compliance. Please review the list below and address all compliance issues ASAP.

These projects have data compliance issues:

Project ID	Project Name	Stale Task Count	Late Issue Count	Late Risk Count	Late Status Report	Total Count
PR9232	Deploy Windows 7	18			No Status Reports created	19
PRJ03	Create Webcam Conference	3	1	2	No Status Reports created	7

This is an automated message. Please do not reply.

Workflows: Allocation Confirmation Notification

Allocation Confirmation Notification - Mozilla Firefox

https://outlook.office365.com/owa/projection.aspx

Reply all | Delete | Junk | ...

Clarity Admin <[REDACTED]>

To: Navdeep Joshi

Thu 1/28/2016 4:29 PM

Inbox

Action Items

Hi Navdeep

Below are your weekly allocation hours for the next 6 weeks, please verify and update as appropriate. [Click here](#) for Resource Allocation page.

Project ID	Project Name	01 Feb 2016	08 Feb 2016	15 Feb 2016	22 Feb 2016	29 Feb 2016	07 Mar 2016
PR2480	RegoXchange Development	0.40	0.40	0.40	0.40	0.40	0.40
PR2493	Solution Oversight - Knowledge Management	14.80	14.80	14.80	14.40	14.40	14.40
PR2494	Admin - Internal Environments	1.40	1.40	1.40	1.40	1.40	1.40
PR2486	Admin - Internal Training				9.78	9.78	9.78
PR2492	Solution Oversight - Support	1.40	1.40	1.40	1.40	1.40	1.40
PR2641	Go To Market Solution - Communities	10.00	10.00	10.00	10.00	10.00	10.00
PR1664	Solution Oversight - Innovation	12.00	12.00	12.00	12.00	12.00	12.00
	Total	40.00	40.00	40.00	49.38	49.38	49.38

Thanks.

Note: This is a system generated notification, please do not reply to this email.

Workflows: PM Time Notification Process

To: PM Name

You are receiving this email because you have at least one person who tracked time to this project last week. PLEASE review this time and validate that the time was spent on your project. If you disagree with the time, please contact the resource.

Here is the detail:

Resource	Task	Hours
Resource 1	Deployment Support - Test to Prod	9.0
Resource 1	Design/Build - East	3.0
Resource 1	Design/Build - West	30.0
Resource 2	Design/Build - East	2.5
Resource 2	Design/Build - West	10.0
Resource 2	Deployment Support - Test to Prod	10.0
Resource 3	Data Migration - East	4.0
Resource 3	Deployment Support - Test to Prod	2.0
Resource 3	Design/Build - East	4.0
Resource 3	Design/Build - West	3.0
Resource 3	Meetings with Client	4.0

This is an automated message. Please do not reply.

Workflows: Populate Resource Calendar Data

Properties Skills Allocations Document Manager Calendar Audit

Resource-Labor: Jon Hoaldrige - Main - Resource Calendar List

Filter: None

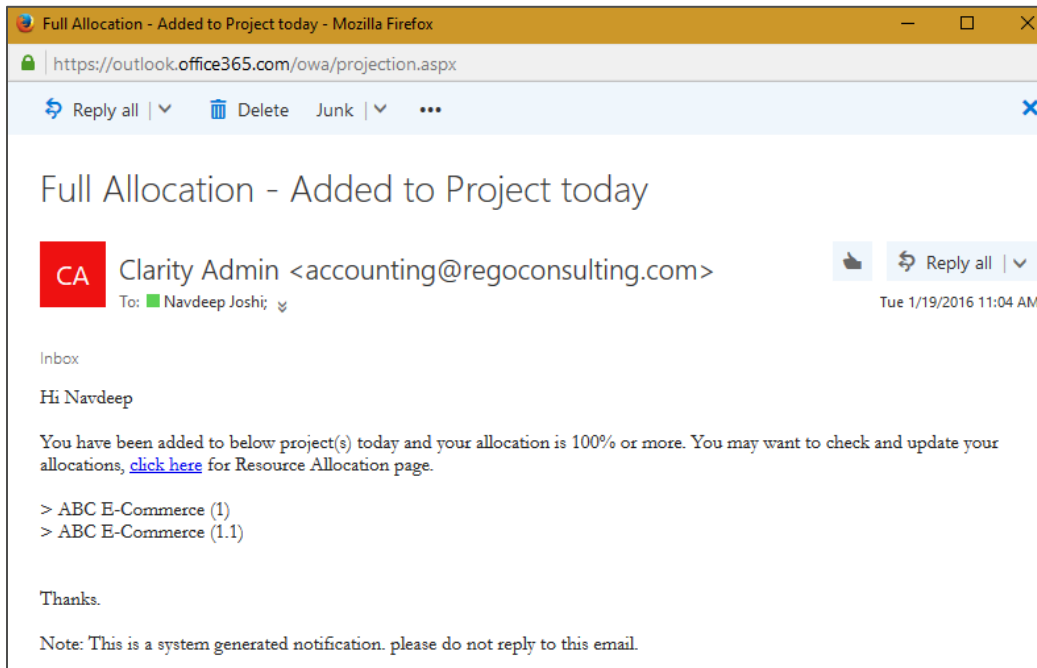
Calendar Entry Type: All
Day of Week: All
Exception Date: to
Is Workday: All
Is Exception: All
Is PTO: All
Power Filter: [Build Power Filter]

Filter Show All Save Filter Clear

	Calendar Entry Type	Day of Week	Exception Date	Is Workday	Is Exception	Is PTO	Shifts	Shifts Duration (Hours)
<input type="checkbox"/>	Day of Week	Sunday						0.00
<input type="checkbox"/>	Day of Week	Monday		✓			1) 08:00 - 12:00; 2) 13:00 - 17:00;	8.00
<input type="checkbox"/>	Day of Week	Tuesday		✓			1) 08:00 - 12:00; 2) 13:00 - 17:00;	8.00
<input type="checkbox"/>	Day of Week	Wednesday		✓			1) 08:00 - 12:00; 2) 13:00 - 17:00;	8.00
<input type="checkbox"/>	Day of Week	Thursday		✓			1) 08:00 - 12:00; 2) 13:00 - 17:00;	8.00
<input type="checkbox"/>	Day of Week	Friday		✓			1) 08:00 - 12:00; 2) 13:00 - 17:00;	8.00
<input type="checkbox"/>	Day of Week	Saturday						0.00
<input type="checkbox"/>	Calendar Exception	Monday	5/30/16		✓	✓		0.00
<input type="checkbox"/>	Calendar Exception	Saturday	6/4/16	✓	✓		1) 08:00 - 12:00; 2) 13:00 - 17:00;	8.00
<input type="checkbox"/>	Calendar Exception	Monday	6/13/16		✓	✓		0.00
<input type="checkbox"/>	Calendar Exception	Tuesday	6/14/16		✓	✓		0.00
<input type="checkbox"/>	Calendar Exception	Wednesday	6/15/16		✓	✓		0.00
<input type="checkbox"/>	Calendar Exception	Thursday	6/16/16		✓	✓		0.00
<input type="checkbox"/>	Calendar Exception	Friday	6/17/16		✓	✓		0.00
<input type="checkbox"/>	Calendar Exception	Monday	7/4/16		✓	✓		0.00

Displaying 1 - 15 of 15

Workflows: Resource Over-Allocation Notification



Properties

Skills

Allocations

Document Manager

Calendar

Audit

Resource-Labor: Navdeep Joshi - Resource/Role Allocations

Scenario: [-Select-]

Actions

Filter: System Default

											Allocation By Period					
		Investment	Investment Manager	Investment Role	Booking Status	Allocation Start	Allocation Finish	Allocation	Actuals	ETC	Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16
<input type="checkbox"/>		ABC E-Commerce (1)	Administrator, Niku		Soft	6/9/14	9/28/17	6,912.00	0.00	0.00	168.00	168.00	184.00	168.00	176.00	176.00
<input type="checkbox"/>		ABC E-Commerce (1.1)	Drees, Dan		Soft	6/9/14	9/28/17	6,912.00	0.00	0.00	168.00	168.00	184.00	168.00	176.00	176.00
Total								13,824.00	0.00	0.00						

Save

Add

Remove

Highlighted rows = Approved Flag

Displaying 1 - 2 of 2

Workflows: Set Resource Daily Availability

- This process must be run using the “Execute a Process” job. Job may be scheduled or run on-demand.
- Process pulls Availability Rate from the availability blob for each resource, where blob is not null. Then it populates this value into a custom Daily Availability attribute (Number field with 2 decimals) on the Resource object. This field does not have to be displayed to be used for reporting.
- Because the OOB Availability Rate field is stored only in a blob, it is difficult to include in portlet or report output. The use of this custom attribute makes the value easily reportable.

Workflows: Create Cost Plan from Assignment and Actuals

- Creates a cost plan to mimic a true forecast. This means that all actual cost in the previous full months will be created as planned cost and future months will utilize the ETCs assigned to the resource on the assignment level.*
- *coming soon

Workflows: Timesheet Smoothing

Timesheet												
Time Period: 1/4/16 - 1/10/16												
Resource Name Jon Hoaldrige			Modified by Jon Hoaldrige									
Timesheet Status Returned			Last Modified 2/7/16 2:34 PM									
Investment	Description	Input Type Code	Mon 1/4	Tue 1/5	Wed 1/6	Thu 1/7	Fri 1/8	Sat 1/9	Sun 1/10	Total		
JH Test Timesheet Splits	Task 1	bill	5.00	4.00	5.00		5.00			19.00		
JH Test Timesheet Splits	task 2	bill	4.00	5.00		5.00				14.00		
JH Test WBS Levels	Level 7	bill	3.00		4.00	4.00	4.00			15.00		
	Total		12.00	9.00	9.00	9.00	9.00	0.00	0.00	48.00		

Timesheet

Time Period: 1/4/16 - 1/10/16

Resource Name Jon Hoaldridge

Submitted by Jon Hoaldridge

Timesheet Status Submitted

Last Modified 2/7/16 2:37 PM

Investment	Description	Input Type Code	Mon 1/4	Tue 1/5	Wed 1/6	Thu 1/7	Fri 1/8	Sat 1/9	Sun 1/10	Total
Tasks										
JH Test Timesheet Splits	Task 1	bill	4.17	3.33	4.17		4.17			15.83
JH Test Timesheet Splits	Task 1(split)	nonbill	0.83	0.67	0.83		0.83			3.17
JH Test Timesheet Splits	task 2	bill	3.33	4.17		4.17				11.67
JH Test Timesheet Splits	task 2(split)	nonbill	0.67	0.83		0.83				2.33
JH Test WBS Levels	Level 7	bill	2.50		3.33	3.33	3.33			12.50
JH Test WBS Levels	Level 7(split)	nonbill	0.50		0.67	0.67	0.67			2.50
	Total		12.00	9.00	9.00	9.00	9.00	0.00	0.00	48.00

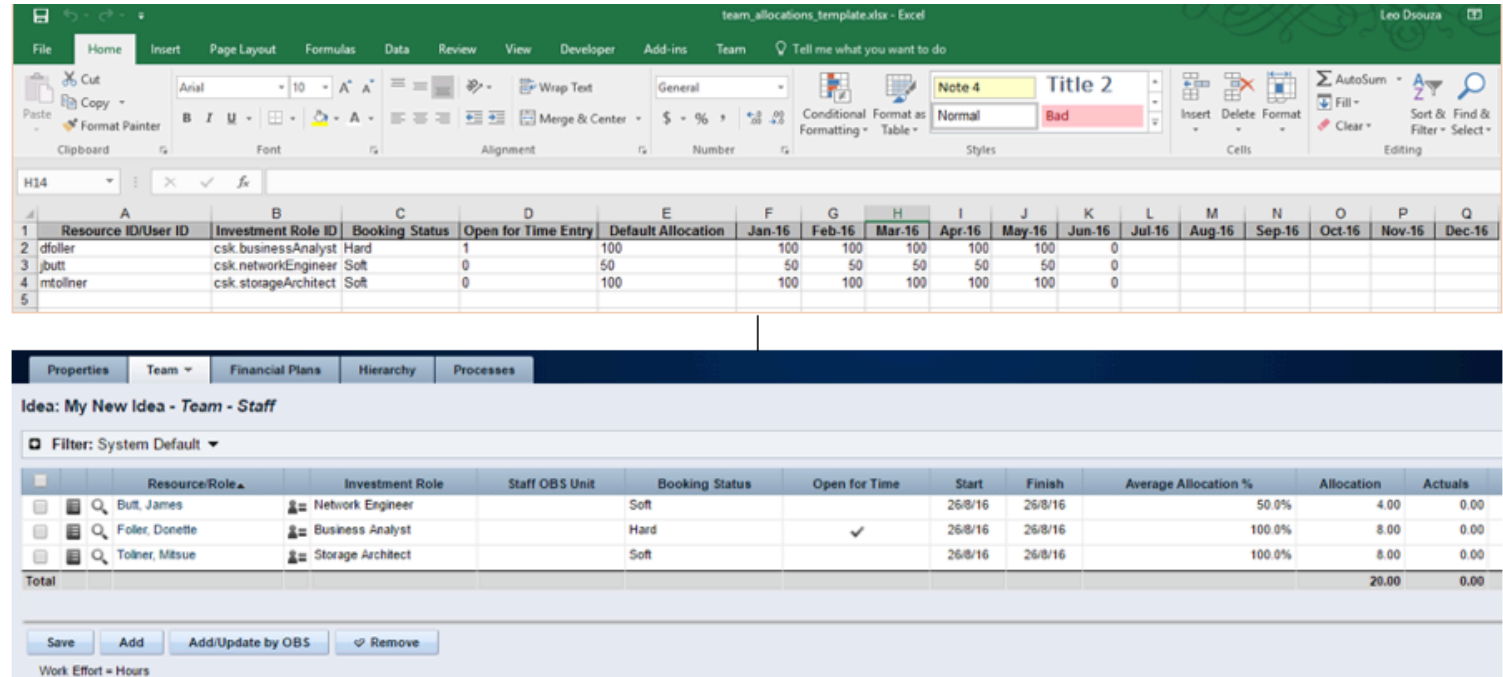
Workflows: Timesheet Split Process

Timesheet												
Time Period: 4/21/14 - 4/27/14												
Resource Name Jon Hoaldrige					Modified by Jon Hoaldrige							
Timesheet Status Returned					Last Modified 8/26/16 12:00 PM							
Investment	Description	Input Type Code	Charge Code	Mon 4/21	Tue 4/22	Wed 4/23	Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Total	
Tasks												
JH Demo to Tammi	task 1	bill	Expense	8.00		1.00	8.00				17.00	
JH Demo to Tammi	task 2	bill	Expense	2.00		1.00			4.00		7.00	
JH End-to-End Test Project Closure	task 3	bill	Expense		3.00	1.00					4.00	
JH End-to-End Test Project Closure	task 4	bill	Expense		3.00	1.00		8.00			12.00	
JH Test Cost Smoothing	task	bill	Expense		3.00	1.00					4.00	
	Total			10.00	9.00	5.00	8.00	8.00	4.00	0.00	44.00	

Timesheet												
Time Period: 4/21/14 - 4/27/14												
Resource Name Jon Hoaldrige					Submitted by Jon Hoaldrige							
Timesheet Status Submitted					Last Modified 8/24/16 6:16 PM							
Investment	Description	Input Type Code	Charge Code	Mon 4/21	Tue 4/22	Wed 4/23	Thu 4/24	Fri 4/25	Sat 4/26	Sun 4/27	Total	
Tasks												
JH Demo to Tammi	task 1	bill	Expense	7.27	0.91	7.27					15.45	
JH Demo to Tammi	task 1(split)	nonbill	Expense	0.73	0.09	0.73					1.55	
JH Demo to Tammi	task 2	bill	Expense	1.82	0.91			3.64			6.36	
JH Demo to Tammi	task 2(split)	nonbill	Expense	0.18	0.09			0.36			0.64	
JH End-to-End Test Project Closure	task 3	bill	Expense		2.73	0.91					3.64	
JH End-to-End Test Project Closure	task 3(split)	nonbill	Expense		0.27	0.09					0.36	
JH End-to-End Test Project Closure	task 4	bill	Expense		2.73	0.91	7.27				10.91	
JH End-to-End Test Project Closure	task 4(split)	nonbill	Expense		0.27	0.09	0.73				1.09	
JH Test Cost Smoothing	task	bill	Expense		2.73	0.91					3.64	
JH Test Cost Smoothing	task(split)	nonbill	Expense		0.27	0.09					0.36	
	Total			10.00	9.00	5.00	8.00	8.00	4.00	0.00	44.00	

regoXchange Plus: Uploaders

- Idea Allocation Uploader
- Project Allocation Uploader



The top part of the image shows an Excel spreadsheet titled 'team_allocations_template.xlsx'. The spreadsheet has columns for Resource ID/User ID, Investment Role ID, Booking Status, Open for Time Entry, Default Allocation, and monthly allocations from Jan-16 to Dec-16. The bottom part shows the RegoXchange Plus web interface for 'Idea: My New Idea - Team - Staff'. It displays a table with columns for Resource/Role, Investment Role, Staff OBS Unit, Booking Status, Open for Time, Start, Finish, Average Allocation %, Allocation, and Actuals. The table lists three resources: Butt, James; Foler, Donette; and Tolner, Mitsue. Below the table are buttons for Save, Add, Add/Update by OBS, and Remove.

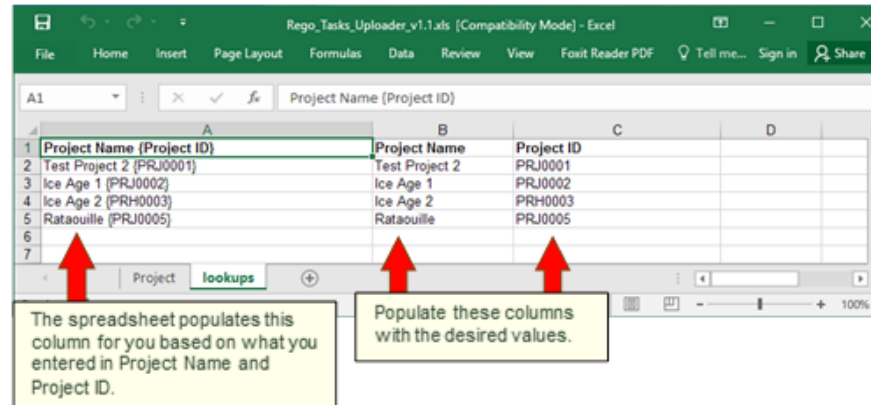
Resource ID/User ID	Investment Role ID	Booking Status	Open for Time Entry	Default Allocation	Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16
dfoller	csk.businessAnalyst	Hard	1	100	100	100	100	100	100	100	0					
jbutt	csk.networkEngineer	Soft	0	50	50	50	50	50	50	0						
mtolner	csk.storageArchitect	Soft	0	100	100	100	100	100	100	0						

Resource/Role	Investment Role	Staff OBS Unit	Booking Status	Open for Time	Start	Finish	Average Allocation %	Allocation	Actuals
Butt, James	Network Engineer		Soft		26/8/16	26/8/16	50.0%	4.00	0.00
Foler, Donette	Business Analyst		Hard	✓	26/8/16	26/8/16	100.0%	8.00	0.00
Tolner, Mitsue	Storage Architect		Soft		26/8/16	26/8/16	100.0%	8.00	0.00
Total								20.00	0.00

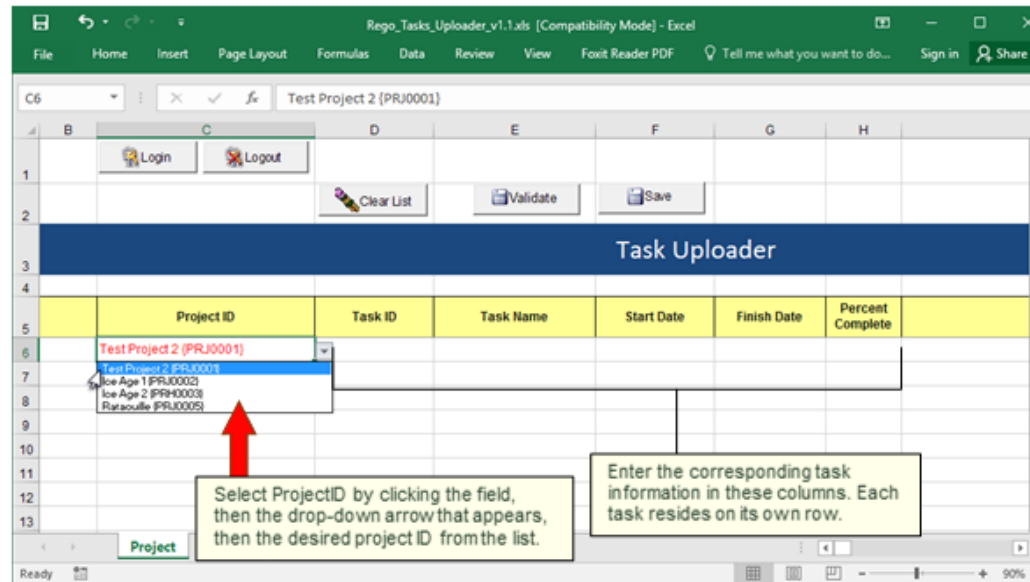
Investment ID	Investment Name	Resource ID	Resource Name	Staff OBS	Comments	1/1/2016	1/2/2016	1/3/2016	1/4/2016	1/5/2016	1/6/2016
PRJ0030	Invest1	jdoe	John Doe	Staff1	Comment1	10	25		40		50
PRJ0030	Invest1	jsmith	Jim Smith	Staff2	Comment2		100	150		200	
PRJ0030	Invest1	csk.dba	DBA	Staff3		50	55	60	65	70	75
idea1	Ideal	jdoe	John Doe	Staff1	Comment3	10	25	35		45	
idea1	Ideal	jsmith	Jim Smith	Staff2	Comment4	17	27	37			47

regoXchange Plus: Uploaders

- Rego Task Uploader



- Transaction Uploader from Excel*



Content Highlights

Training: Documents and Videos (200+ Files)

Rego Base Training: Released in Fall 2015

- Advanced CA PPM Administration
- Advanced Data Model Training
- Crystal Reports Development
- Intro to CA PPM Application Administration
- Introduction to CA PPM Financials
- Introduction to CA PPM Open Workbench
- Jaspersoft Development
- Managing Portfolios with CA PPM
- Managing Projects with CA PPM
- Managing Resources with CA PPM
- Using Jaspersoft with CA PPM

Introduction To CA PPM Video Series: V14.2+

Module 1

- CA PPM Components, Navigating the User Interface and Configuring the Overview Page

Module 2

- List Views and Filters, Actions Drop Down Menus, and the Options Icon

Module 3

- Account Settings, the Organizer and Notifications

Module 4

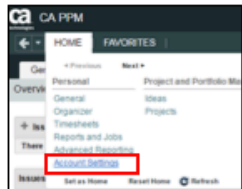
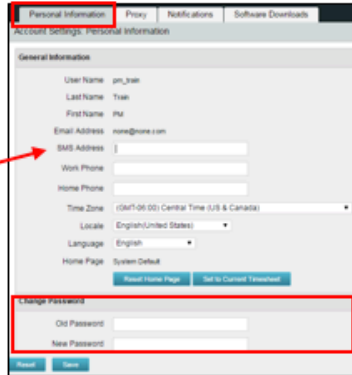
- Portlets vs. Reports, Running a Report

Quick Reference Cards


- CA PPM Basics – 10
- Demand Management – 5
- Financial Management – 4
- Program Management – 3
- Project Management – 26
- Resource Management – 7
- Time Management - 6

CA PPM Quick Reference Card

✓ Account Settings


Instructions	Screen
<p>Account Settings provides quick access to your CA PPM profile.</p> <p>From the Home menu, under Personal, click Account Settings.</p>	
<p>The first tab is Personal Information and may be updated with your preferences. You'll notice that some fields are not editable, and updates to these fields must be made by your system administrator.</p> <p>If you would like CA PPM to send notifications to your mobile device, enter the number in the SMS address, and then click Save.</p> <p><u>It is best practice not to manipulate the information in the Change Password section.</u> Your organization will have procedures in place to change your password in CA PPM.</p>	 <p>Tips: CA PPM supports multiple languages, select your Language from the drop-down and click Save. You can also set your Home Page to the current week's timesheet.</p>

Adoption Metrics




CA Clarity Adoption Metrics

Defined Clarity Performance. Unique Solution.



CA Clarity Adoption Metrics from Rego Consulting

In short, our PPM Adoption Metrics provide a way to measure how well CA Clarity PPM is being utilized in your organization. The metrics are based on a predefined set of project and resource attributes to drive more effective project and resource management practices.




Increase CA Clarity Value

CA Clarity administrators can use PPM Adoption Metrics to measure CA Clarity use and develop effective adoption strategies.



Information On Demand

Adoption metrics trends allow you to create custom tables that will store 12 months of historical scores for each of the defined adoption metrics.



Customized GUI

The project adoption metrics are viewed in a tabular set of portlets that display the data either graphically or numerically.



Immediate Results

A nightly process is implemented that calculates the adoption metric score for each of the attributes defined and the scoring rules.

Rego Consulting | Clarity Expertise On Demand | regiconsulting.com

Defined CA Clarity Metrics Reporting

A set of predefined project attributes, resource attributes, and portlets.

Project Metrics		Resource Metrics
Project Status Reporting	Project Milestone/Key Tasks	Project Resource Clarity Usage
Project Risk Adoption	Project Schedule Variance	Resource Timesheet
Project Issue	Project Effort Variance	Resource Allocation
Project Schedule	Project Budget Variance	Resource Actual Utilization
Project Baseline	Project Unfilled Roles	Resource Allocation Date in the Past
Project Zero ETCs	Project Data	Resource Data Quality
Project Past ETCs	Project Commitment	Resource Commitment



Metrics Defined

Rego's CA Clarity PPM Adoption Metrics package consists of two sets of metrics: Project metrics and Resource metrics. Project metrics measure how effectively project managers are using CA Clarity to manage their projects. Resource metrics measure how effectively resource managers are using CA Clarity to manage resources.



Scoring System

Metrics are scored on a scale of 0-5, with higher scores indicating greater adoption and use. All metrics can be viewed numerically or graphically, and can be broken out by OBS. Metric data can display as a 12-month rolling history to help identify trends. Project metrics can also be displayed by lowest and highest adoption rates.

REGOEXCHANGE SUBSCRIBERS
\$5,000

Includes: Content
Installation Package
Training
Light Configuration

NON-SUBSCRIBERS
\$10,000

Includes: Content
Installation Package
Training
Light Configuration

Contact us today to get started with CA Clarity Adoption Metrics.



www.regiconsulting.com

info@regiconsulting.com

888.813.0444

Let Rego be your guide.

45

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Xchange Plus: Adoption Metrics

- Rego's CA PPM Adoption Metrics package consists of two sets of metrics: Project metrics, and Resource metrics. Project metrics measure how effectively project managers are using CA PPM to manage their projects. Resource metrics measure how effectively resource managers are using CA PPM to manage resources.
- Metrics are scored on a scale of 0 to 5, with higher scores indicating greater adoption and use. All metrics can be viewed numerically or graphically, and can be broken out by OBS. In addition, metric data can display as a 12-month rolling history to help identify trends. Project metrics can also display by lowest / highest adoption rates for a specific resource metric or all resource metrics.
- There are a variety of ways to view the Adoption Metric data, therefore, Rego has made this simple by creating an Adoption Metrics object that contains multiple tabs. Each tab displays one or more of the Project or Resource Adoption Metrics. Based on the nature of the Metrics some tabs will allow the ability to use a pull down menu to select a specific Adoption Metric. There is also a Metrics trending view that pulls monthly snapshots of the metrics.

Part II : Performance Management Service

A Proactive Performance Subscription Service For CA PPM

Your Guide: Joshua Leone




*rego*University 2017

Visibility Into Actionable Performance Data




- Rego's Performance Management Service:

✓	Centers around proactive performance subscription health checks based on real end user experience and usage.
✓	Identifies known performance issues, defects, and “gotchas”.
✓	Stops the guessing and pinpoints the slowest pages and portlets—whether reported by end users or not.
✓	Benchmarks client performance compared to other similar sized customers.
✓	Includes an annual environmental health check to ensure environment is in line with growth.
✓	Analyzes real end-user experience.
✓	Allows us to leverage our experience and knowledge in looking at hundreds of CA PPM systems, including the world’s largest and most complex.

Service Overview: Initial Assessment

	Collect	Full day session to: <ul style="list-style-type: none">✓ Assist in completing environment info✓ Review current usage from CA PPM usage reports✓ Review scheduled jobs✓ Knowledge transfer
	Output	<ul style="list-style-type: none">✓ CA PPM Usage profile reports/slowest actions reports✓ Quick wins / “safe” recommendations✓ Recommended best practices✓ Workarounds to known defects
	Internal Resources Needed	<ul style="list-style-type: none">✓ Database Administrator (1-2 hours)✓ Server Administrator (1-2 hours)✓ Network Administrator (1 hour)✓ CA PPM Administrators (1-2 hours)✓ CA PPM Business Owner (1-2 hours)

Service Overview: Monthly Data Analysis

	Review Usage	<ul style="list-style-type: none">✓ Check on trending from previous reports✓ Compare/benchmark to other customer user of similar size
	Analyze the Output	<ul style="list-style-type: none">✓ Slow Actions✓ Average Action Time✓ Sessions Trending✓ Duplicate Actions
	Meet/Explain Results	<ul style="list-style-type: none">✓ One hour meeting with a performance expert✓ Review Rego generated CA PPM usage reports✓ Check in on previous recommendations

Sample Report: Slow Actions

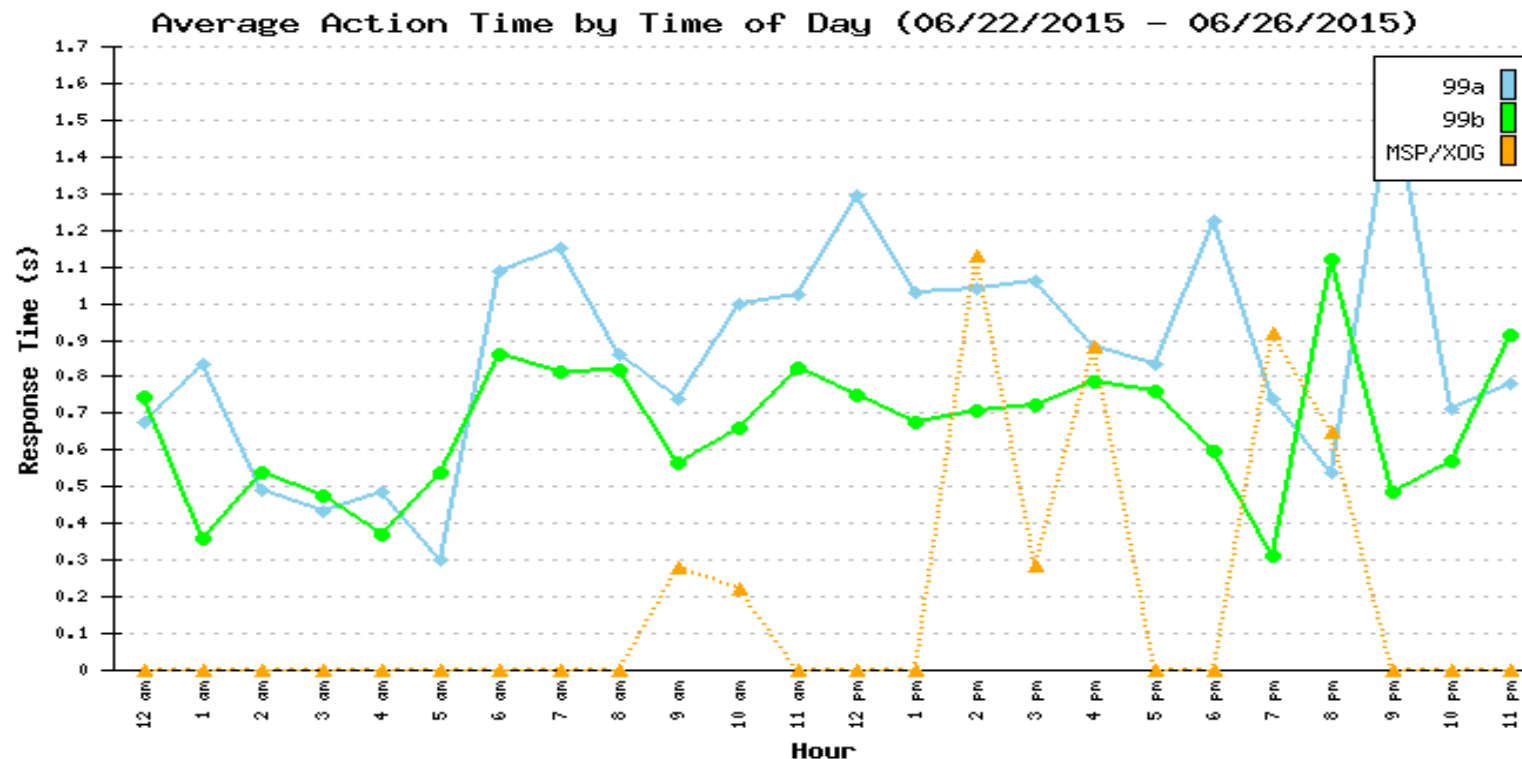
- Simple but effective – A list of slowest action across multiple days and all application servers
- Highlight problem areas even if the end user never reported an issue or waited for the action to complete

Average Page Load Times (Top 50)

#	Page/Action	Max Duration	Average Duration	Number of Executions
1	npt.gridExcelExport	00:02:24	00:00:32	17
2	odf.savePropertiesPageAndExit	00:00:25	00:00:25	1
3	copProjectManagerDashboard	00:00:25	00:00:23	2
4	odf.saveObjectUserListFilterLayoutAndExit	00:00:46	00:00:19	4
5	copSponsor	00:00:12	00:00:12	1
6	cop.page.tsOverview	00:00:11	00:00:11	1
7	odf.saveObjectUserListFilterLayout	00:00:10	00:00:10	1
8	odf.viewSubmitExpression	00:00:11	00:00:09	2
9	projmgr.projectNewPost	00:00:17	00:00:07	9
10	odf.objectUserFilterLayout	00:00:07	00:00:06	14
11	odf.propertiesSectionProperties	00:00:06	00:00:06	1
12	projmgr.allocations	00:00:09	00:00:05	3
13	mainnav.work	00:00:24	00:00:04	624
14	npt.sortGrid	00:00:09	00:00:04	52
15	copProgramDashboard	00:00:04	00:00:04	1
16	projmgr.projectPropertiesPost	00:00:10	00:00:03	453
17	search.basicSearchValidate	00:00:05	00:00:03	3
18	npt.setPage	00:00:09	00:00:03	290
19	npt.getPages	00:00:03	00:00:03	1
20	projmgr.wbsMoveTasksCheck	00:00:03	00:00:03	2

Sample Report: Average Action Time

- Average response time by application server or time of day
- Can pin point the slowest hour of the day by server. From there the Rego team can drill into the specific actions showing performance issues



Performance portlets

- CA now includes some basic performance portlets
- Aggregates data from the access logs
 - System stats by hour/day
 - System stats by month
 - Daily page/xog views
 - Log Data Export

Questions?



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Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Select **Education-Category B-Continuing Education or Category C-Self-Directed Learning**
- 1 PDU per hour
- 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**



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