



*rego*University 2017

regoXchange | Content Review

Your Guides: Eric Taylor & Joshua Leone

Introductions

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



Part I : Introduction to regoXchange

regoUniversity 2017

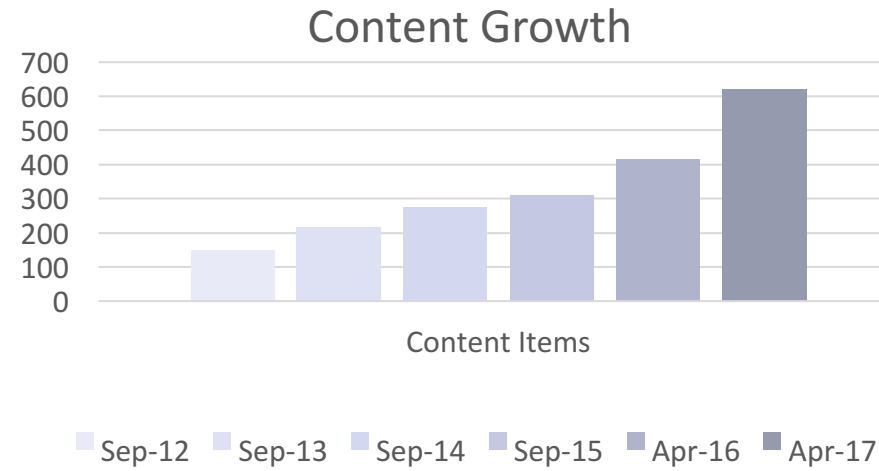
Let Rego be your guide.

- Quick Overview of regoXchange
- Content Highlights
 - Portlets
 - Tech Tricks
 - Workflows
- Performance Management

Agenda

regoXchange: Quick Overview

- The regoXchange went live 4 ½ years ago and started with about 150 content items



- The user base consists of more than 1,800 individuals representing more than 600 companies
- There are two content libraries, theBasiX (free content), and theWorX (available with subscription)

Quick Demo: Finding Content

The easiest ways to find content on the site

Work Categories



Work Types



Keyword

Content Highlights

Portlets: Reviewing 8 of 190+

Portlets: Attributes On Portlets

Attributes on Portlets

Portlet NameAll Assignments

Field Name

Portlet Code

Field Code

VirtualAll

Filter

Show All

Save Filter

Clear

Portlet Name▲	Portlet Code	Field Name	Field Code	Virtual
All Assignments	rego_all_assignments	Actuals	actual_hours	
All Assignments	rego_all_assignments	Days Late	days_late_number	
All Assignments	rego_all_assignments	Days Old	days_old_number	
All Assignments	rego_all_assignments	ETC	etc_hours	
All Assignments	rego_all_assignments	Finish Date	prfinish	
All Assignments	rego_all_assignments	Internal Assignment ID	assignment_id	
All Assignments	rego_all_assignments	Internal Manager ID	manager_id	
All Assignments	rego_all_assignments	Internal Project ID	project_id	
All Assignments	rego_all_assignments	Internal Resource ID	resource_id	
All Assignments	rego_all_assignments	Internal Resource Manager ID	resource_mgr_id	
All Assignments	rego_all_assignments	Is Active	is_active	
All Assignments	rego_all_assignments	Is Late	is_late	
All Assignments	rego_all_assignments	Manager Name	manager_name	
All Assignments	rego_all_assignments	Pending Hours	pending_hours	
All Assignments	rego_all_assignments	Percent Expended	percent_expended	
All Assignments	rego_all_assignments	PR Status	prstatus	
All Assignments	rego_all_assignments	Project ID	project_code	
All Assignments	rego_all_assignments	Project Name	project_name	
All Assignments	rego_all_assignments	Rate Location Code	rate_location_code	
All Assignments	rego_all_assignments	Resource	resource_name	

◀◀

Page 1 of 2

▶▶

Displaying 1 - 20 of 24

Portlets: Job Schedule

Job Schedule Details

Name

delete

CA Job

Description

Active

Scheduled

Yes

Type

Filter

Show All

Save Filter

Clear

Name ▲	Description	CA Job?	Scheduled	Months	Days	Hours	Minutes	Active	Last Updated
Delete Investments	Delete selected investments and their associated data including investment hierarchy, financial data, tasks, timesheets and documents etc.	Yes	Yes	*	*	2	0	Yes	7/31/14

Displaying 1 - 1 of 1

Portlets: CA PPM Schema

Clarity Schema

Table Links

Clarity Schema Tabs: Clarity Schema

Clarity Schema

Table

INV_INVESTMENTS

Type

NUMBER

Field

*C

Description

The

Grouping

Investments

Filter

Show All

Save Filter

Clear

Link	Table▲	Field	Description	Type
	INV_INVESTMENTS	CREATED_BY	The resource that created this row. This refers to CMN_SEC_USERS.ID. Red X(Checked): 1	NUMBER
	INV_INVESTMENTS	IS_ACTIVE	This column indicates if the investment is active. Values are: 1 = Active(true), 0 = Inactive(false)	NUMBER
	INV_INVESTMENTS	SLA_COMPLIANCE	The spotlight used to indicate the level of SLA compliance. Values are: 0-33 = Green, 34-67 = Yellow, 68-100 = Red	NUMBER
	INV_INVESTMENTS	SLICE_STATUS	This column indicates if the information in this table is out-of-date, currently updating, or up-to-date. Values are: Null = Up-to-date, 1 = Out-of-date with the PRJ_BLB_SLICES table, 2 = Time slicing background process is currently updating the PRJ_BLB_SLICES table	NUMBER
	INV_INVESTMENTS	STATUS_INDICATOR	A "Green," "Yellow," or "Red" value that indicates the overall status of the project (or some other investment). This refers to the INVESTMENT_STATUS_INDICATOR lookup.	NUMBER
	INV_INVESTMENTS	SYNC_INV_N_BDG_DATES	Indicates if the planned cost (start/finish) dates should be kept in sync with the investment(start/finish) dates. Values are: 0 = False, 1 = True	NUMBER

Clarity Schema

Table Links

Clarity Schema Tabs: Table Links

Clarity Schema Links

Table▲	To Table	Link
FIN_COST_PLAN_DETAILS	cmn_lookups_v	lov1_ID or lov2_ID = Lookup_code
FIN_COST_PLAN_DETAILS	fin_plans	plan_ID = ID
FIN_COST_PLAN_DETAILS	prChargeCode	prChargeCode_ID = prID
FIN_COST_PLAN_DETAILS	srm_resources	prRole_ID = ID
FIN_COST_PLAN_DETAILS	transclass	transclass_ID = ID

Displaying 1 - 5 of 5

Portlets: Custom Attributes In System

Custom Attributes in System

Object Name

company

Last Updated Date

to

Attribute Name

Created By

Attribute Code

Created Date

to

Data Type

Filter

Show All

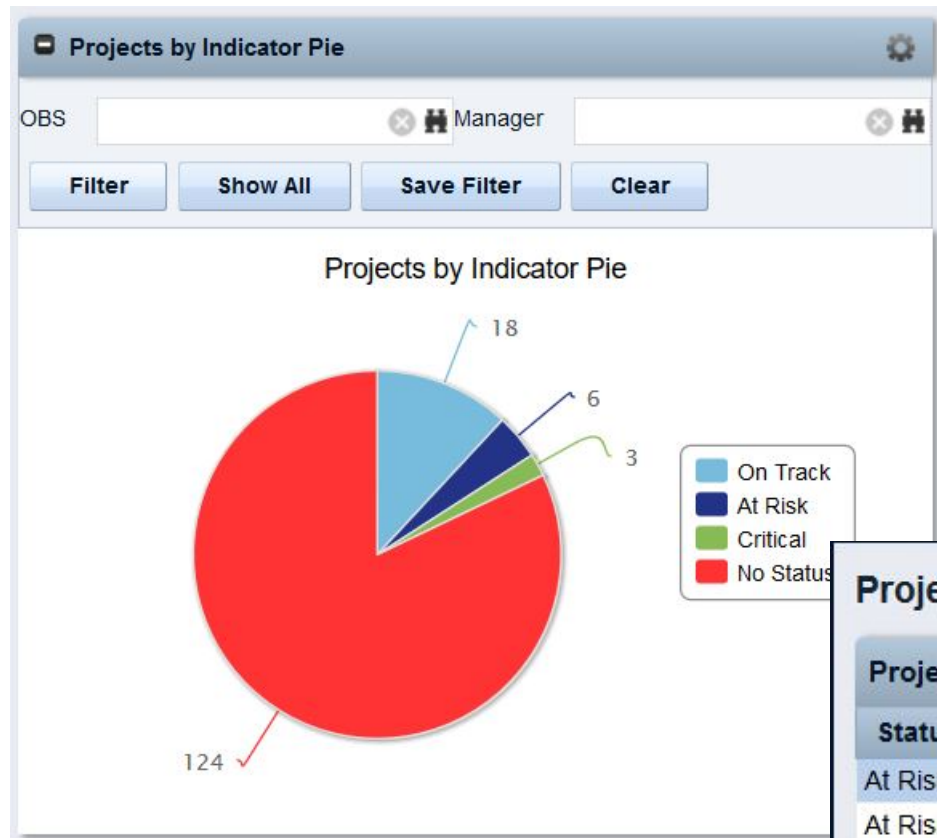
Save Filter

Clear

Object Name▲	Object Code	Attribute Name	Attribute Code	Created Date	Is Required	Data Type	Data Size	Lookup Type Code	Lookup Type Name	Partition Code	Is Active
COMPANY	ODF_CA_COMPANY	Financial Entity	odf_entity_code	12/4/11	NO	string	30	SCH_BROWSE_ENTITY_LOC	Entity browse	NIKU.ROOT	YES
COMPANY	ODF_CA_COMPANY	Fiscal Period End Date	odf_period_end	12/4/11	NO	number	30	FISCAL_PERIOD_BROWSE	Fiscal Time Period Browse	NIKU.ROOT	YES
COMPANY	ODF_CA_COMPANY	Fiscal Period Start Date	odf_period_start	12/4/11	NO	number	30	FISCAL_PERIOD_BROWSE	Fiscal Time Period Browse	NIKU.ROOT	YES
COMPANY	ODF_CA_COMPANY	Fiscal Period Type	odf_period_type	12/4/11	NO	string	30	PERIOD_TYPE	Period Type	NIKU.ROOT	YES

Displaying 1 - 4 of 4

Portlets: Projects By Status Indicator



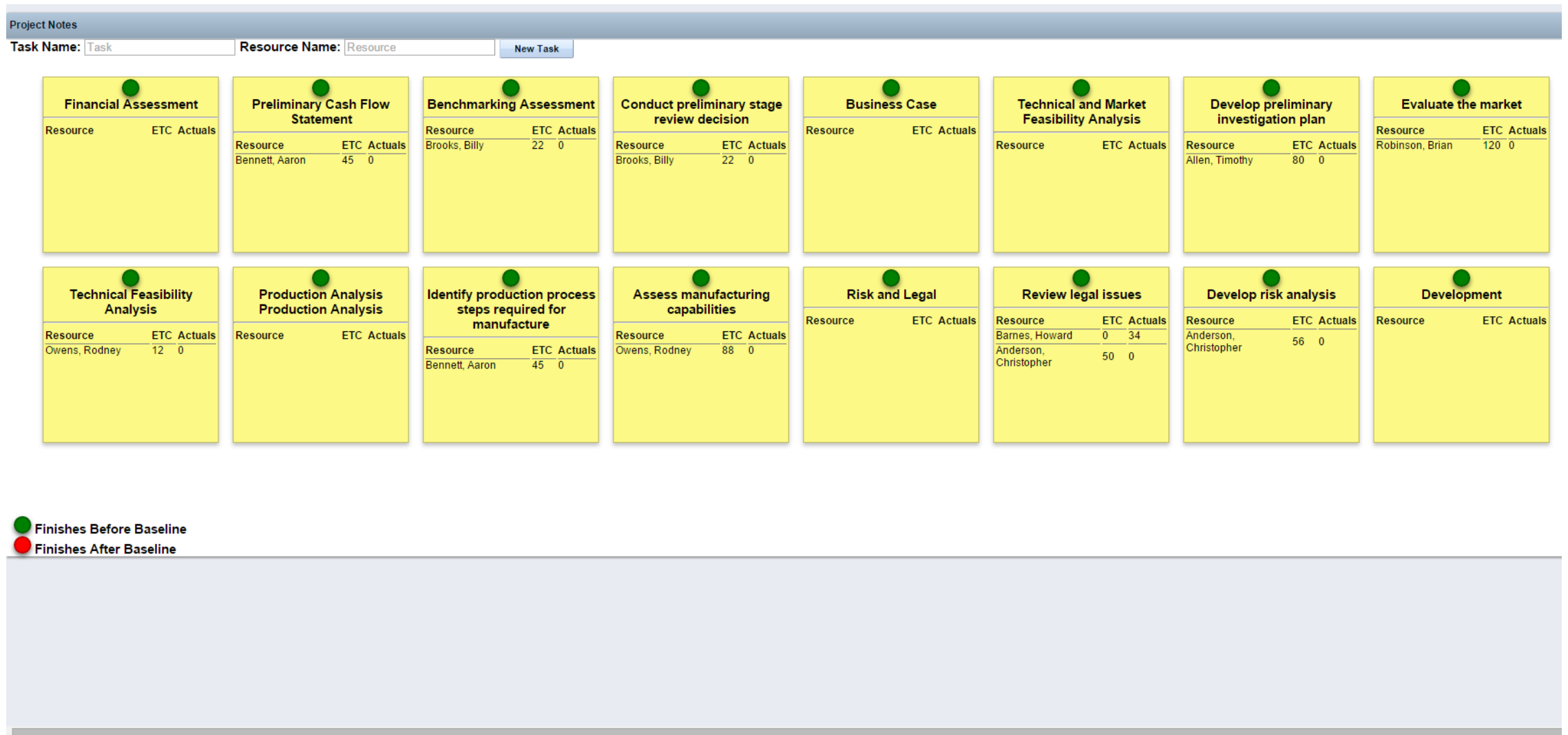
Projects By Indicator

Projects by Indicator Drill

Status Indicator▲	Investment Name	Investment ID	Manager Name	Start	Finish
At Risk	Test concentrates	PRJ0038	West, Wally	5/21/00	6/17/17
At Risk	Search for Nemesis	PRJ0008	Mary, Aunt	7/30/12	3/2/15
At Risk	Invisible Forcefield Upgrade	PRJ0014	America, Captain	2/17/13	3/2/15
At Risk	SpiderWeb.net User Interface Refresh	PRJ0015	Mary, Aunt	2/15/13	7/3/13
At Risk	CER Test Program	PRJ0043	Reynolds, Clayton	7/30/12	12/23/14
At Risk	Superhero Charity Event	PRJ0018	Kent, Clark	7/30/12	8/12/13

Displaying 1 - 6 of 6

Portlets: Task At A Glance Dashboard



Portlets: Milestone Task Dependency

Milestone Task Dependency

Project(s)

Milestone Name

Project Active?

All

Project ID

Project Name

Filter

Show All

Save Filter

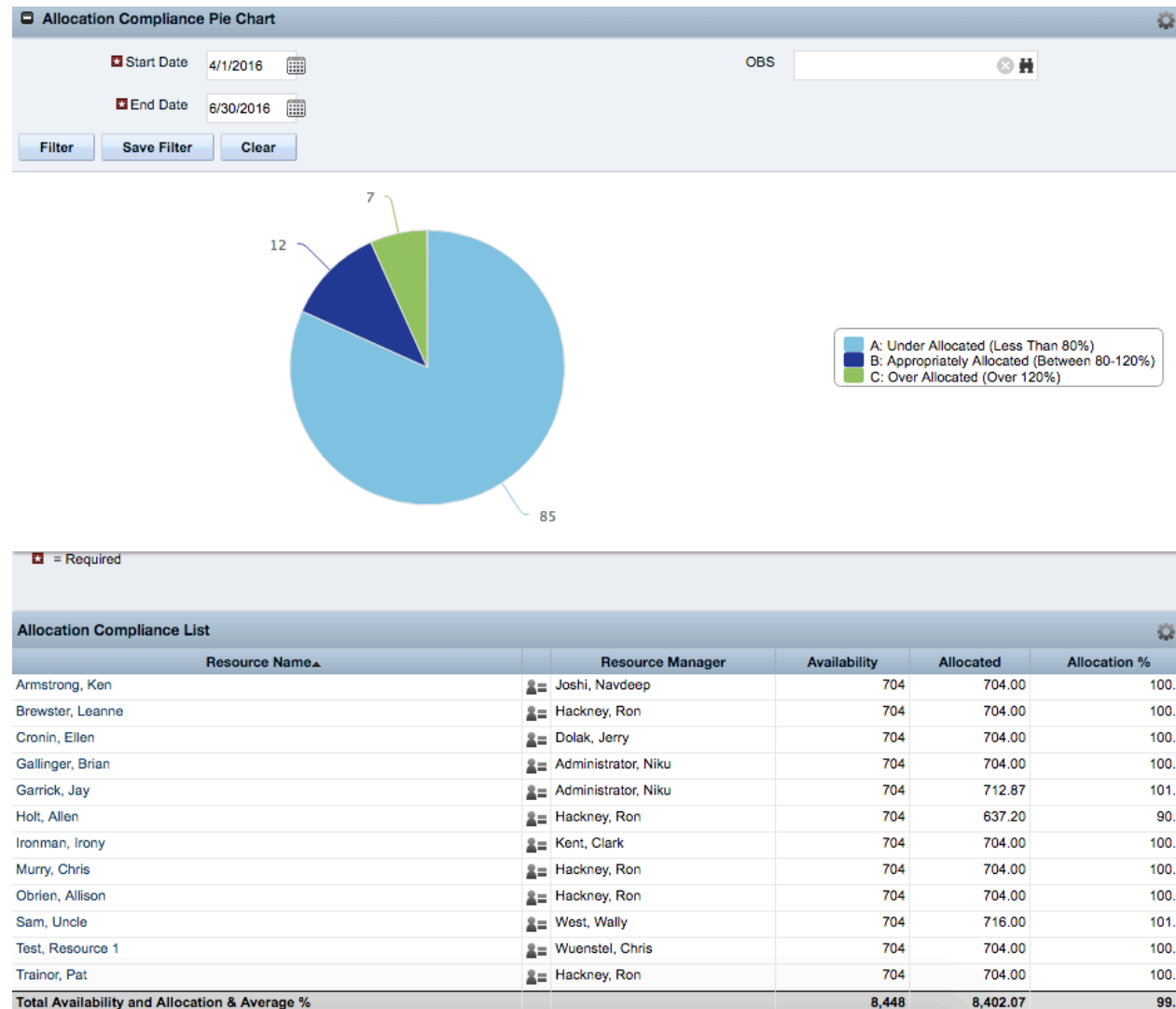
Clear

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: Allocation Compliance Pie Chart with Drilldown



Content Highlights

Technical Tricks – Reviewing 6 of 40+

Tech Tricks: Dynamic Links in Portlets

- This Tech Trick allows the ability to link anywhere within the CA PPM environment from a custom portlet link, even if it is not a standard OOTB link option
- For example, you could link to a Departments page or directly to a timesheet even though these are not standard OOTB links to choose from when creating custom portlets
- This trick works in CA PPM versions 12, 13 and 14 for both SQL and Oracle environments

Tech Tricks: Export Hierarchical Portlet To Excel

Projects and Tasks Hierarchy

Project(s):

Project ID:

Project Manager(s):

Project/Task Name	Project ID	WBS Level	Task Status	Open for Time Entry?	Start Date	Finish Date	Actuals (Hours)	ETC (Hours)	EAC (Hours)	EAC Percent Complete	Percent Complete	Schedule					
												Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15
[-] Bat Cave Re-Design (PRJ0001)	PRJ0001	0	Not Started	✓	8/27/12	7/8/15	277.00	10,569.05	10,846.05	2.55%	0.00%						
[-] Bat Cave Re-Design	PRJ0001	1	Started	✓	8/27/12	7/8/15	123.00	10,468.68	10,591.68	1.16%	0.00%						
[-] Architecture	PRJ0001	1	Not Started	✓	4/1/13	3/2/15	0.00	0.00	0.00	0.00%	0.00%						
[-] Design	PRJ0001	1	Not Started	✓	2/25/13	5/19/14	0.00	0.00	0.00	0.00%	0.00%						
[-] Build	PRJ0001	1	Not Started	✓	5/21/13	5/31/13	0.00	0.00	0.00	0.00%	0.00%						
[-] Negotiations	PRJ0001	1	Not Started	✓	2/27/13	3/2/15	0.00	0.00	0.00	0.00%	0.00%						
[-] Negotiate Contracts for new Bat Cave Toys with Lucius Fox	PRJ0001	2	Started	✓	2/27/13	8/28/13	0.00	0.00	0.00	0.00%	0.00%						
[-] Source and Hire Construction Company	PRJ0001	2	Started	✓	4/1/13	3/2/15	36.00	3.00	39.00	92.31%	100.00%						
[-] Contact Penguin for Air Conditioning Pricing	PRJ0001	2	Started	✓	2/27/13	4/24/14	42.00	0.00	42.00	100.00%	0.00%						
[-] Source and Hire Tunnel Diggers	PRJ0001	2	Started	✓	4/1/13	5/26/14	0.00	0.00	0.00	0.00%	100.00%						
[-] Source and Hire Interior Designers	PRJ0001	2	Started	✓	4/1/13	5/26/14	0.00	0.00	0.00	0.00%	100.00%						
[-] Negotiate Secure Broadband Connection	PRJ0001	2	Started	✓	2/27/13	8/28/13	0.00	0.00	0.00	0.00%	0.00%						
[-] Deploy Milestone	PRJ0001	1	Not Started	✓	8/12/14	8/12/14	0.00	0.00	0.00	0.00%	0.00%						
[-] Deployment Complete	PRJ0001	1	Not Started	✓	8/21/14	8/21/14	0.00	0.00	0.00	0.00%	0.00%						

Highlighted rows = is_open_te

Tech Tricks: JasperSoft Dev Tricks

- Adding an Extension Font for PDF Export
 - <http://regoxchange.com/show/1021/>
- Adding JasperSoft Reports to HTML Portlet
 - <http://regoxchange.com/show/1019/>
- Conditional Styles – Override Issue
 - <http://regoxchange.com/show/1020/>

Tech Tricks: Linking to Individual Timesheets from a Custom Portlet

- Tech Trick provides details instruction to link timesheets to custom portlets.
- <http://regoxchange.com/show/1014/>

Content Highlights

Workflow Processes – Reviewing 12 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 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

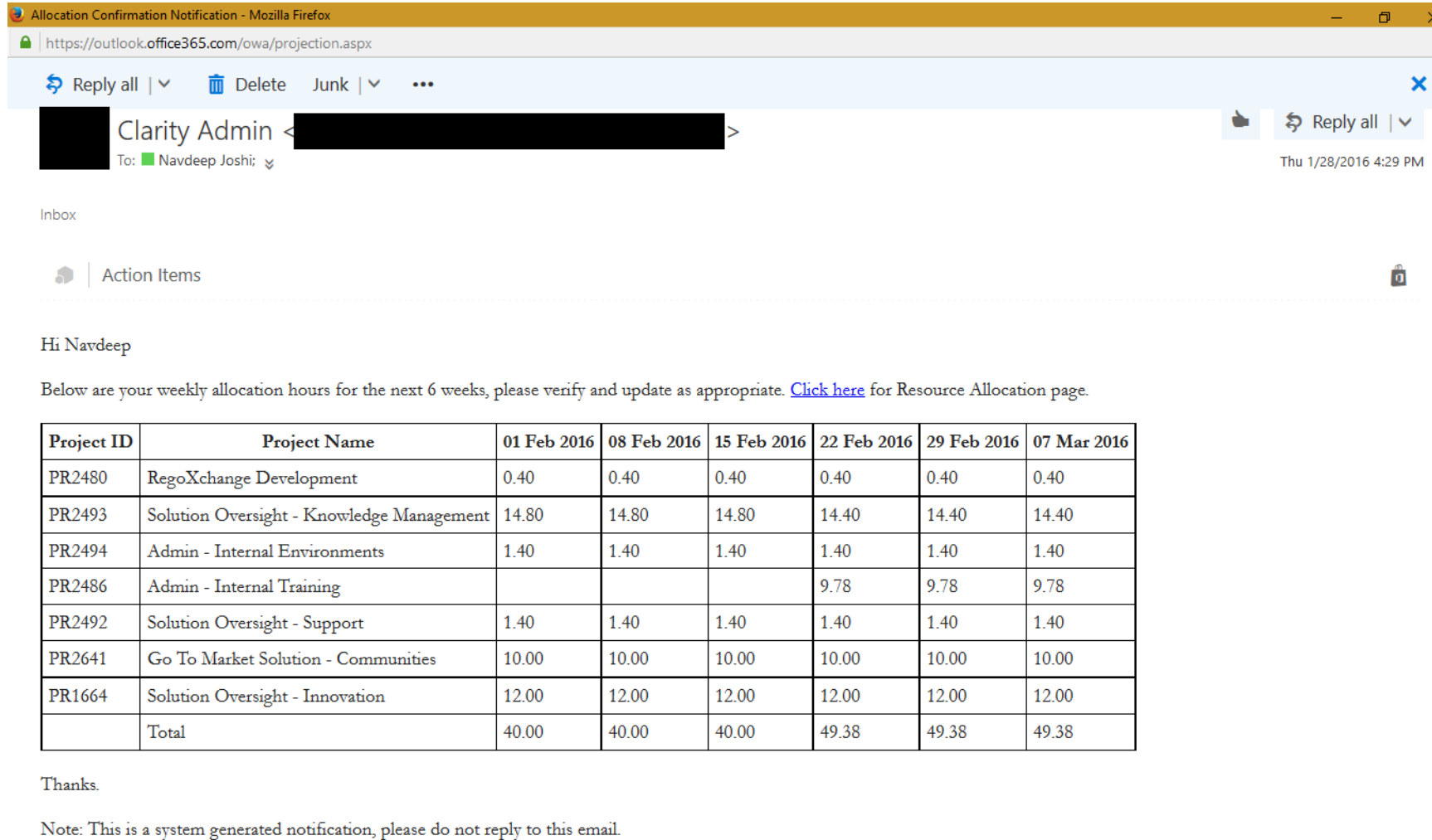
You are receiving this email because at least one project currently assigned to you has data that is out of compliance. Please review the list below and address all compliance issues ASAP.

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: Resource Over-Allocation Notification

Full Allocation - Added to Project today - Mozilla Firefox

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

Reply all | Delete | Junk | ...

Full Allocation - Added to Project today

CA Clarity Admin <accounting@regoconsulting.com>
To: Navdeep Joshi; Tue 1/19/2016 11:04 AM

Inbox

Hi Navdeep

You have been added to below project(s) today and your allocation is 100% or more. You may want to check and update your allocations, [click here](#) for Resource Allocation page.

- > ABC E-Commerce (1)
- > ABC E-Commerce (1.1)

Thanks.

Note: This is a system

Properties

Skills

Allocations

Document Manager

Calendar

Audit

Resource-Labor: Navdeep Joshi - Resource/Role Allocations

Scenario: [--Select--] Actions

Filter: System Default

			Investment▲	Investment Manager	Investment Role	Booking Status	Allocation Start	Allocation Finish	Allocation	Actuals	ETC	Allocation By Period					
												Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16
<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<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						

Displaying 1 - 2 of 2

Save

Add

Remove

Highlighted rows = Approved Flag

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: 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		
<input type="checkbox"/>	JH Test Timesheet Splits	Task 1	bill	5.00	4.00	5.00		5.00			19.00		
<input type="checkbox"/>	JH Test Timesheet Splits	task 2	bill	4.00	5.00		5.00				14.00		
<input type="checkbox"/>	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 Hoaldrige				Submitted by Jon Hoaldrige									
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		
<input type="checkbox"/>	JH Test Timesheet Splits	Task 1	bill		4.17	3.33	4.17		4.17		15.83		
<input type="checkbox"/>	JH Test Timesheet Splits	Task 1(split)	nonbill		0.83	0.67	0.83		0.83		3.17		
<input type="checkbox"/>	JH Test Timesheet Splits	task 2	bill		3.33	4.17		4.17			11.67		
<input type="checkbox"/>	JH Test Timesheet Splits	task 2(split)	nonbill		0.67	0.83		0.83			2.33		
<input type="checkbox"/>	JH Test WBS Levels	Level 7	bill		2.50		3.33	3.33	3.33		12.50		
<input type="checkbox"/>	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		

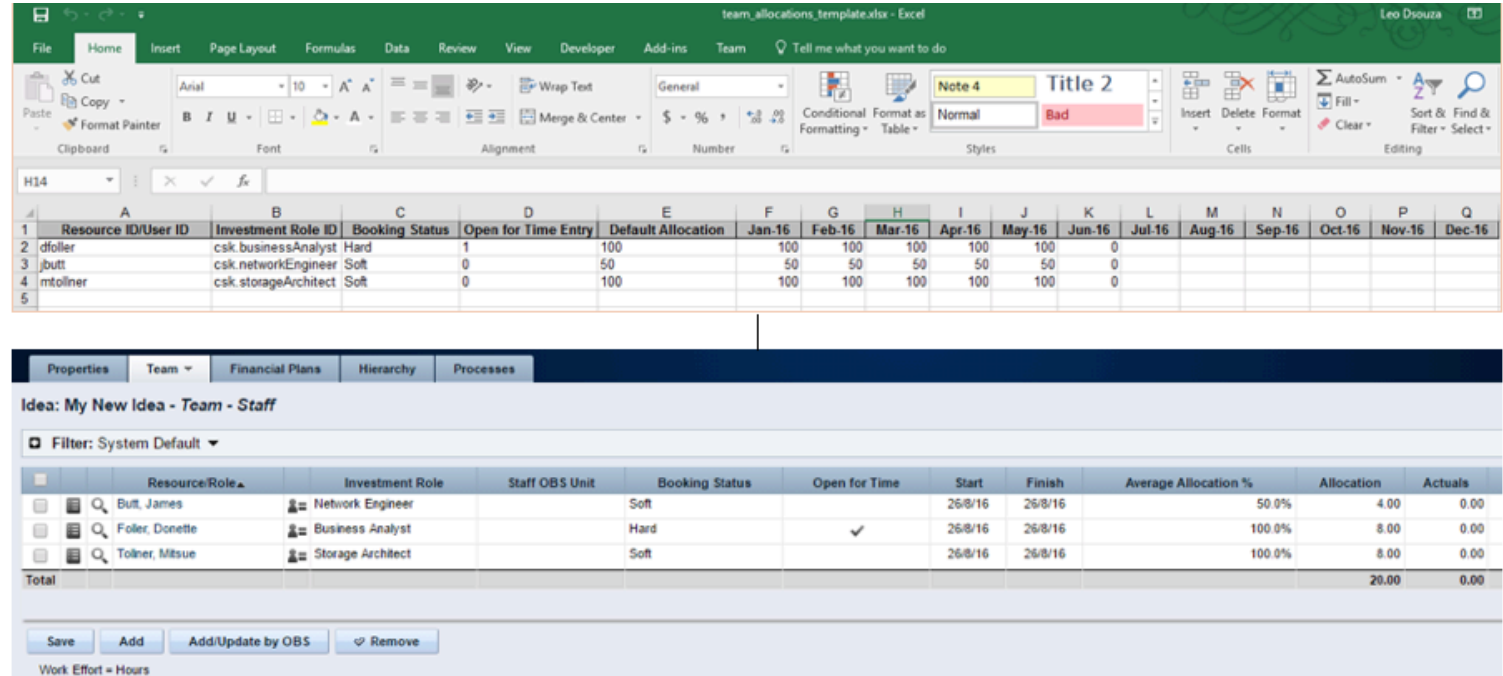
Workflows: Timesheet Split Process

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	
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.

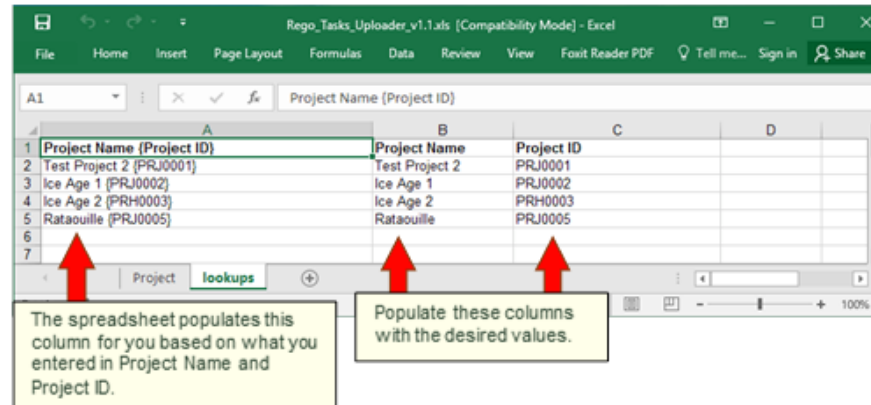
Resource ID/User ID	Investment Role ID	Booking Status	Open for Time Entry	Default Allocation	Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16
dfoller	csk.businessAnalyst	Hard	1	100	100	100	100	100	100	100	0					
jbutt	csk.networkEngineer	Soft	0	50	50	50	50	50	50	0	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

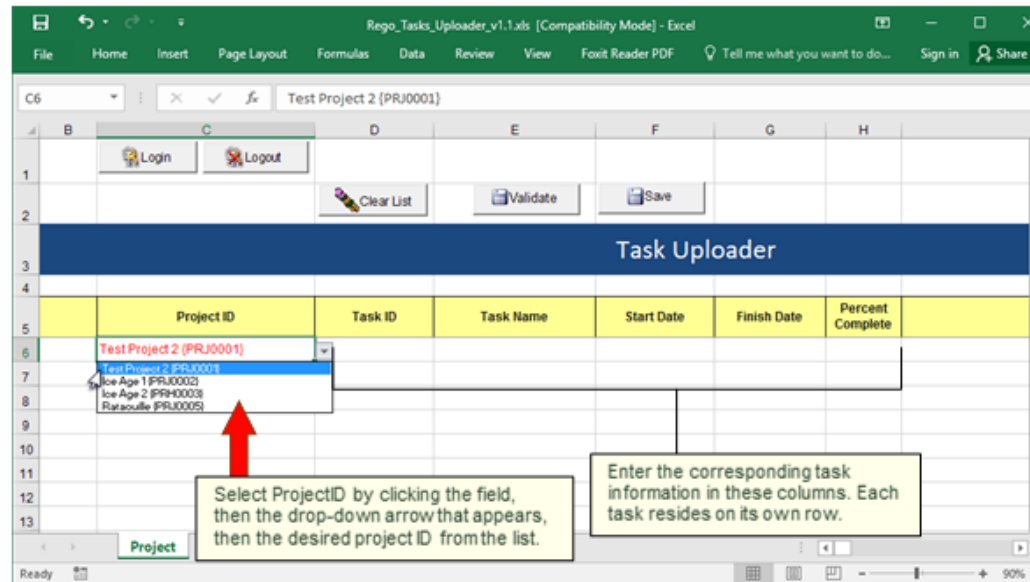
Investment ID	Investment Name	Resource ID	Resource Name	Staff OBS	Comments	1/1/2016	1/2/2016	1/3/2016	1/4/2016	1/5/2016	1/6/2016
PRJ0030	Invest1	jdoe	John Doe	Staff1	Comment1	10	25		40		50
PRJ0030	Invest1	jsmith	Jim Smith	Staff2	Comment2		100	150		200	
PRJ0030	Invest1	csk.dba	DBA	Staff3		50	55	60	65	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*



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

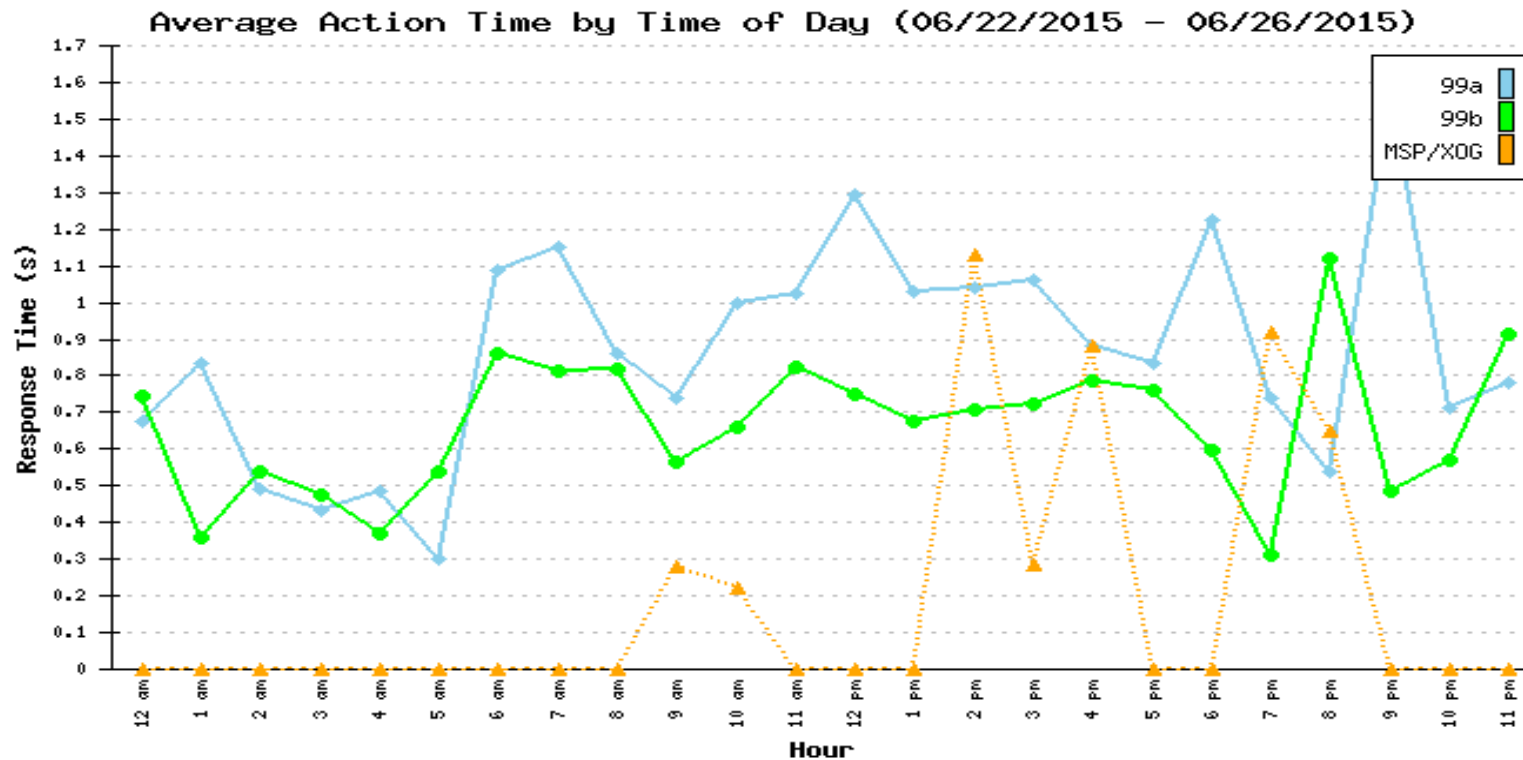
- Simple but effective – A list of slowest action across multiple days and all application servers
- Highlight problem areas even if the end user never reported an issue or waited for the action to complete

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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