



*rego*University 2019

SAN DIEGO

# RegoLink and RegoXchange | Offering Review

Your Guides: Josh Leone and Eric Taylor

# Introductions

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



# Agenda

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- Rego Innovation Overview
- RegoLink - Integrations
  - Overview
  - Samples
- Other Innovation Items
  - SQL Extractor
  - Action Item Responder
  - MSP Connector
  - Functional Modules
  - Excel Uploaders
- RegoXchange

# Overview of Rego Innovation

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- Rego Goals:
  1. Reduce the Cost to Implement & Support a PPM tool
  2. Add new functionality that is not part of the core tool
- All solutions use OOTB capabilities – no customizations
- No ongoing maintenance costs – free upgrades forever, except where we have some ongoing costs – then move to subscription



# RegoLink – Integrations and Innovation



Let Rego be your guide.

## ITSM



## Intake and Collaboration



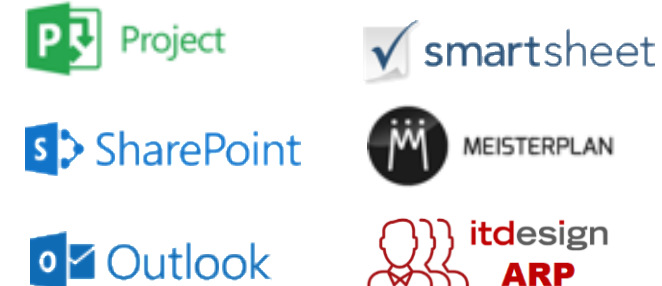
## Applications



## Vendor and Time Management



## Project and Resource Management



Wagile Board

Action Item  
ResponderEnhanced MSP  
Integration

# regoLink

Innovation and integrations for Clarity

SQL Data  
ExtractorChannel  
PackRoadmap  
Printer

## Agile Integrations



## HR/Resource/Financial



## Reporting and Business Intelligence

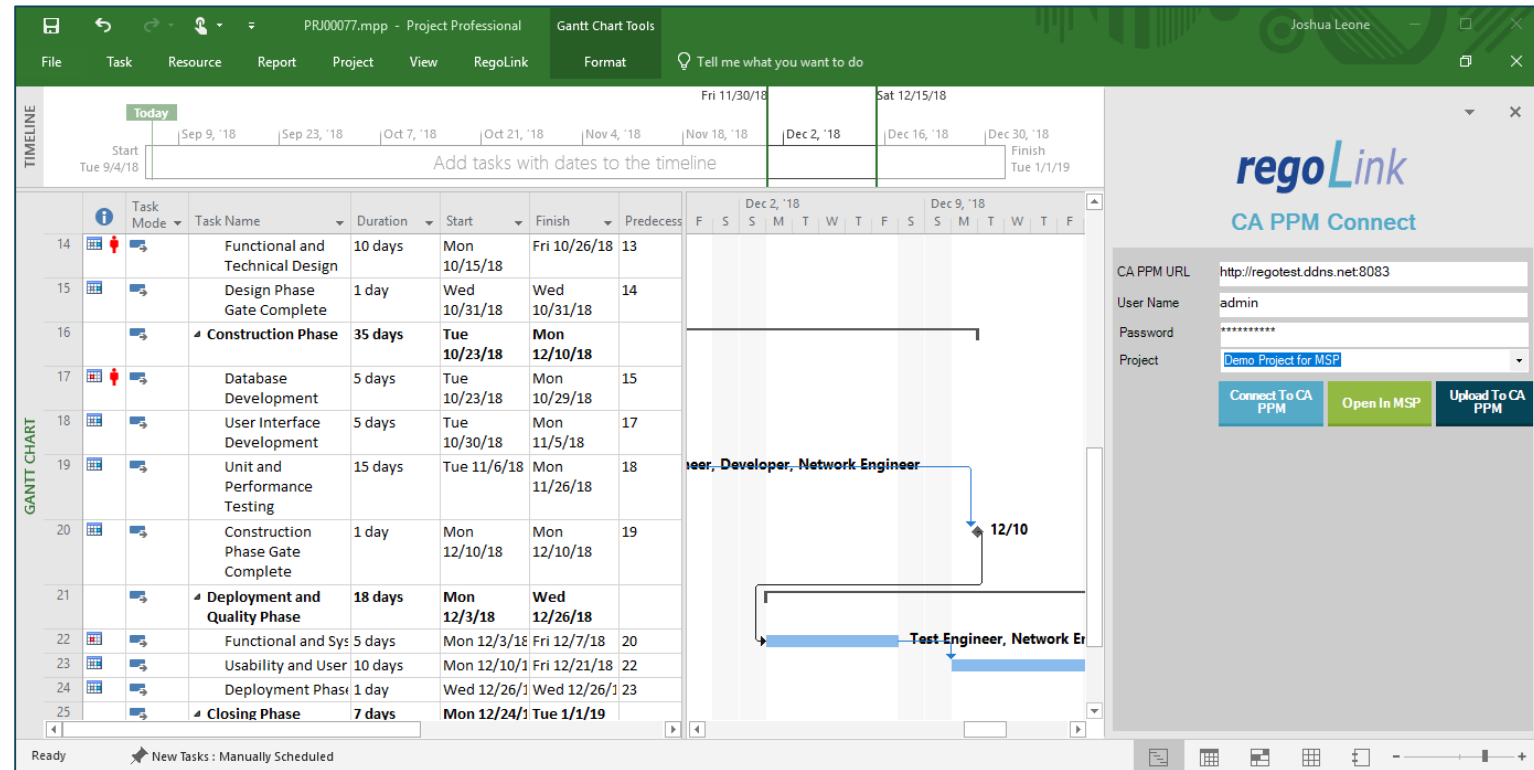


# Rego Innovations: O365 / Schedule connectors

# Enhanced Microsoft Project



- Written from the ground up
  - Latest .NET technology used on the client side
- Optimized for fast saving
  - Reduce payload size and server side validations – twice the speed
- Enhanced Error Messaging
  - When save – identify exact errors preventing the save
- Custom Field Support on the tasks
  - MSP Labels
- Lookups
  - Supports lookups in MSP for task/assignment – traditional and dynamic
  - MSP has a lookup vs. a text field
- Future Release Items
  - Resource Lookups
  - Partial Plan Save – just key tasks and milestones
  - Master/Sub

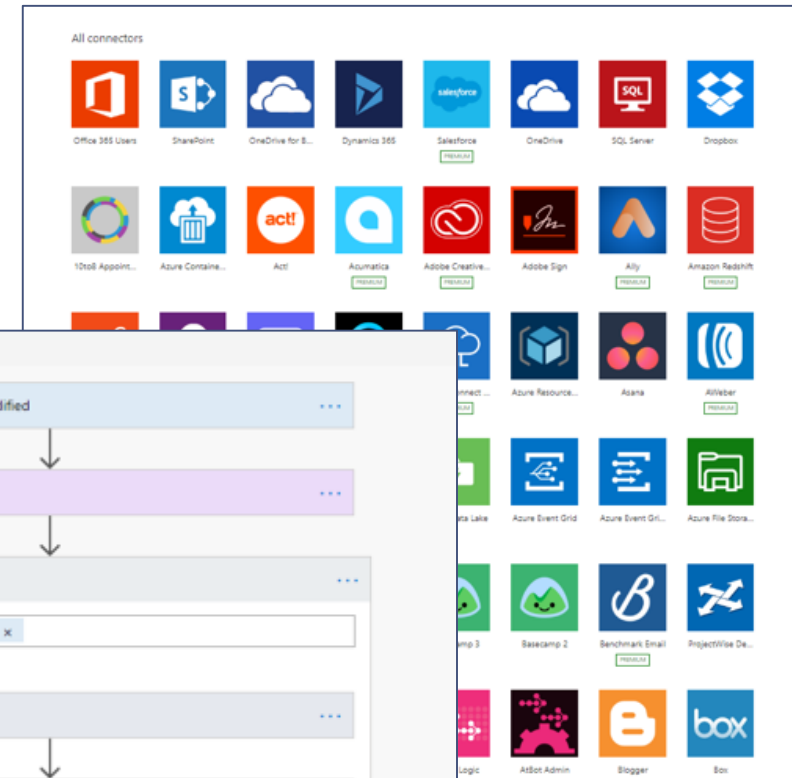




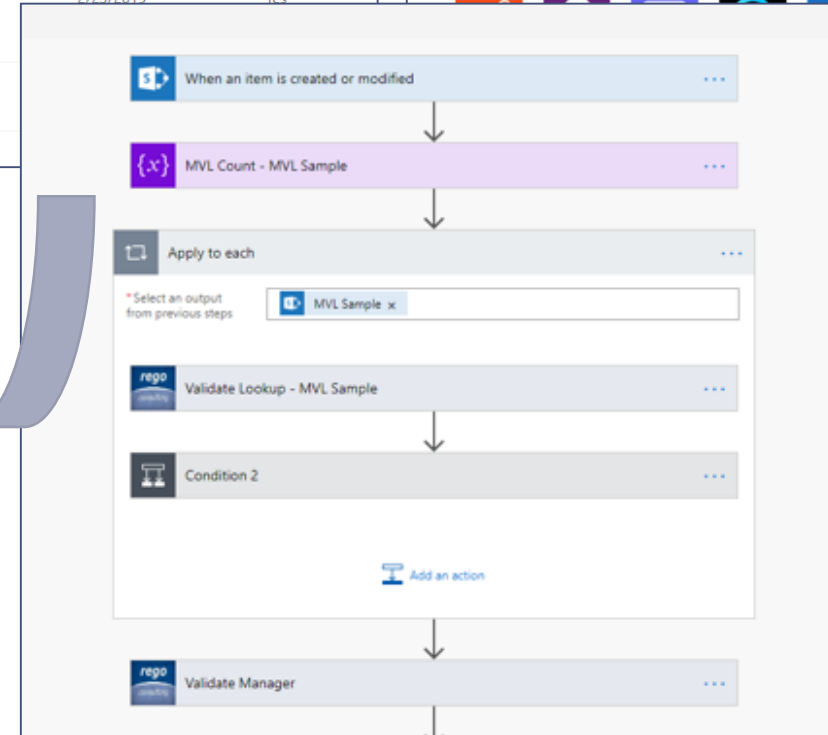
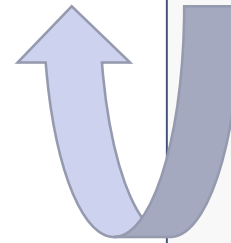
# Microsoft Flow and SharePoint



+ New Quick edit Export to Excel Flow PowerApps ...						
CA PPM Projects						
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	Yes
My New Demo Project	PRJDEMO001	My New Demo Project	Luis Enrique Palacios	2/5/2019		



- Universal Clarity connector
  - Full SharePoint integration capabilities
- Utilize the complete MS Flow ecosystem
  - Approval Flows
  - Create MS Teams on the fly
  - Sync up conversations to Slack
  - Import marketing contacts from Hubspot
  - Hundreds more



# Microsoft Outlook



- Sync Out Office events with your Clarity calendar

Out of Office - Black Friday - Event

File Event Insert Format Text Review Help Tell me what you want to do

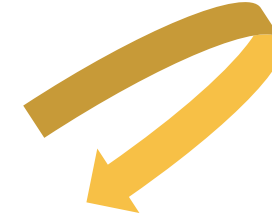
Save & Close Delete Forward Appointment Scheduling Assistant Skype Meeting Teams Meeting Invite Attendees Show As Out of O... Reminder: 18 hours Recurrence Time Zones Categorize High Importance Low Importance Dictate Voice

Subject: Out of Office - Black Friday

Location: Home

Start time: Fri 11/23/2018 12:00 AM Chennai, Kolkata, Mumbai ☒ All day event

End time: Fri 11/23/2018 12:00 AM Chennai, Kolkata, Mumbai



Resource - Labor: Account Demo - Edit Resource Calendar

November 2018

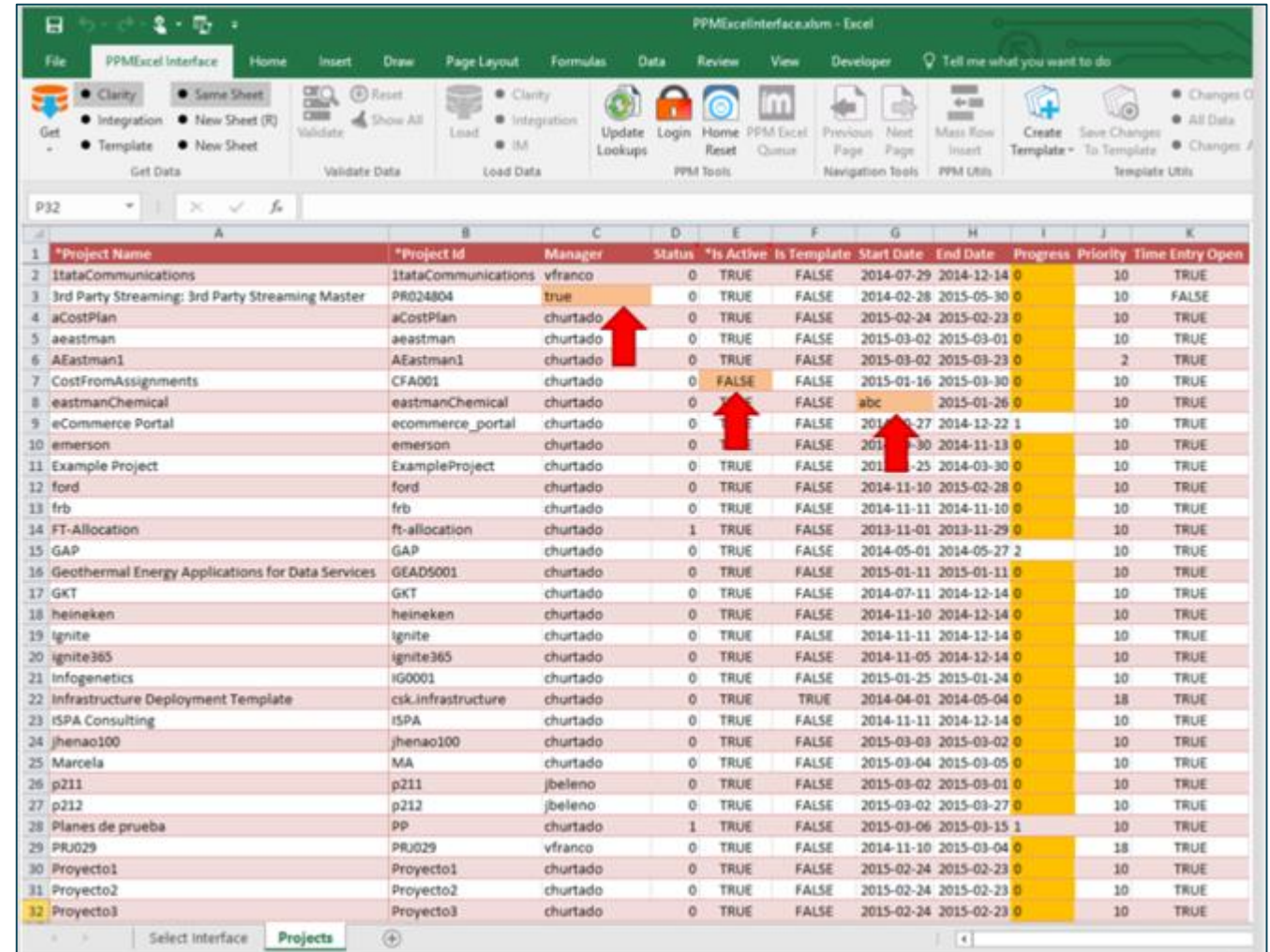
To specify the same week day in the entire calendar, check a day of the week. To specify an individual day, check a date in the month.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

# Microsoft Excel

11

- Attachment based uploaders
  - Cost Plans
  - Allocations
- Excel Data Manager
  - Bulk edit your Clarity data straight from Excel
  - 25 standard data interfaces included



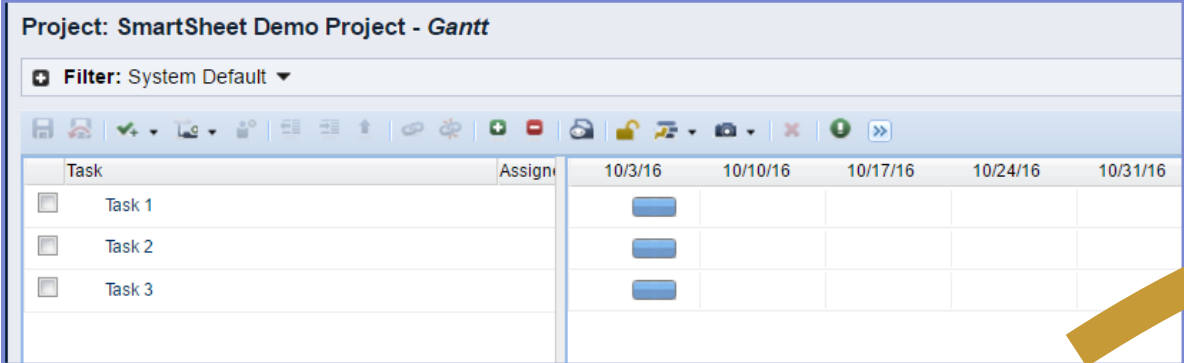
PPMExcelInterface.xlsm - Excel

	A	B	C	D	E	F	G	H	I	J	K
	*Project Name	*Project Id	Manager	Status	*Is Active	Is Template	Start Date	End Date	Progress	Priority	Time Entry Open
1	ItataCommunications	ItataCommunications	vfranco	0	TRUE	FALSE	2014-07-29	2014-12-14	0	10	TRUE
2	3rd Party Streaming: 3rd Party Streaming Master	PR024804	true	0	TRUE	FALSE	2014-02-28	2015-05-30	0	10	FALSE
3	aCostPlan	aCostPlan	churtado	0	TRUE	FALSE	2015-02-24	2015-02-23	0	10	TRUE
4	aEastman	aEastman	churtado	0	TRUE	FALSE	2015-03-02	2015-03-01	0	10	TRUE
5	AEastman1	AEastman1	churtado	0	TRUE	FALSE	2015-03-02	2015-03-23	0	2	TRUE
6	CostFromAssignments	CFA001	churtado	0	FALSE	FALSE	2015-01-16	2015-03-30	0	10	TRUE
7	eastmanChemical	eastmanChemical	churtado	0	FALSE	FALSE	abc	2015-01-26	0	10	TRUE
8	eCommerce Portal	ecommerce_portal	churtado	0	FALSE	FALSE	2014-08-27	2014-12-22	1	10	TRUE
9	emerson	emerson	churtado	0	FALSE	FALSE	2014-11-30	2014-11-13	0	10	TRUE
10	Example Project	ExampleProject	churtado	0	TRUE	FALSE	2014-11-25	2014-03-30	0	10	TRUE
11	ford	ford	churtado	0	TRUE	FALSE	2014-11-10	2015-02-28	0	10	TRUE
12	frb	frb	churtado	0	TRUE	FALSE	2014-11-11	2014-11-10	0	10	TRUE
13	FT-Allocation	ft-allocation	churtado	1	TRUE	FALSE	2013-11-01	2013-11-29	0	10	TRUE
14	GAP	GAP	churtado	0	TRUE	FALSE	2014-05-01	2014-05-27	2	10	TRUE
15	Geothermal Energy Applications for Data Services	GEADS001	churtado	0	TRUE	FALSE	2015-01-11	2015-01-11	0	10	TRUE
16	GKT	GKT	churtado	0	TRUE	FALSE	2014-07-11	2014-12-14	0	10	TRUE
17	heineken	heineken	churtado	0	TRUE	FALSE	2014-11-10	2014-12-14	0	10	TRUE
18	ignite	ignite	churtado	0	TRUE	FALSE	2014-11-11	2014-12-14	0	10	TRUE
19	ignite365	ignite365	churtado	0	TRUE	FALSE	2014-11-05	2014-12-14	0	10	TRUE
20	Infogenetics	IG0001	churtado	0	TRUE	FALSE	2015-01-25	2015-01-24	0	10	TRUE
21	Infrastructure Deployment Template	csk.Infrastructure	churtado	0	TRUE	TRUE	2014-04-01	2014-05-04	0	18	TRUE
22	ISPA Consulting	ISPA	churtado	0	TRUE	FALSE	2014-11-11	2014-12-14	0	10	TRUE
23	jhenao100	jhenao100	churtado	0	TRUE	FALSE	2015-03-03	2015-03-02	0	10	TRUE
24	Marcela	MA	churtado	0	TRUE	FALSE	2015-03-04	2015-03-05	0	10	TRUE
25	p211	p211	jbeleno	0	TRUE	FALSE	2015-03-02	2015-03-01	0	10	TRUE
26	p212	jbeleno	jbeleno	0	TRUE	FALSE	2015-03-02	2015-03-27	0	10	TRUE
27	Planes de prueba	PP	churtado	1	TRUE	FALSE	2015-03-06	2015-03-15	1	10	TRUE
28	PRU029	PRU029	vfranco	0	TRUE	FALSE	2014-11-10	2015-03-04	0	18	TRUE
29	Proyecto1	Proyecto1	churtado	0	TRUE	FALSE	2015-02-24	2015-02-23	0	10	TRUE
30	Proyecto2	Proyecto2	churtado	0	TRUE	FALSE	2015-02-24	2015-02-23	0	10	TRUE
31	Proyecto3	Proyecto3	churtado	0	TRUE	FALSE	2015-02-24	2015-02-23	0	10	TRUE

- Create your projects in Clarity
  - All initial tasks will seed Smartsheet
- Use Smartsheet as your scheduling tool
  - Use the power of all of Smartsheets' features and only sync back the data you need
  - Use Clarity as the governing data repository
- Data will be updated in Clarity on a set schedule
  - 5, 10, 15 minutes or on demand

Project: SmartSheet Demo Project - Gantt

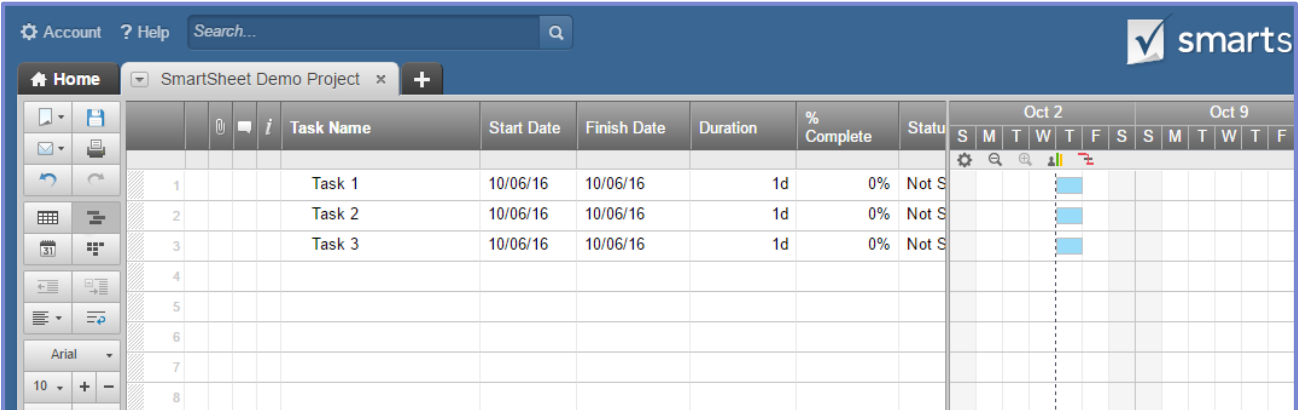
Filter: System Default



Task	Assign	10/3/16	10/10/16	10/17/16	10/24/16	10/31/16
Task 1						
Task 2						
Task 3						

Account ? Help Search...

Home SmartSheet Demo Project



	Task Name	Start Date	Finish Date	Duration	% Complete	Status
1	Task 1	10/06/16	10/06/16	1d	0%	Not S
2	Task 2	10/06/16	10/06/16	1d	0%	Not S
3	Task 3	10/06/16	10/06/16	1d	0%	Not S
4						
5						
6						
7						
8						

Oct 2 Oct 9

S M T W T F S S M T W T F

# Rego Innovations: Usability and Efficiency tools



# Wagile Board



- Multi-dimensional Kanban-like experience of task management
- Conversations on tasks
- Blockers
- Dependencies
- Sub-tasks

Board Configuration Task Board						
Filter for task name						
v0.10.1.1						
	Workshop 1	Workshop 2	Workshop 3	Workshop 5	Workshop 6	Workshop 7
<b>Initiation Phase</b> Duration: 15.00 Priority: 10.00 Task Owner: Walker, Terry Parent: Taunya's awesome Epic	<b>Functional and Techni...</b> Charge Code: Meetings Finish: 09/21/18 Cost Type: Operati...	<b>Complete Project Plan</b> Charge Code: Maintenance Finish: 08/28/18 Cost Type: Operati...	<b>Construction Phase</b> Charge Code: Develop Finish: 10/18/18 Cost Type: Capital	<b>Lessons Learned</b> Charge Code: Design Finish: 11/16/18 Cost Type: Operatin...	<b>Present feedback fro...</b> Charge Code: Finish: 12/04/18 Cost Type:	<b>Taunya Demo</b> Charge Code: Finish: 02/01/19 Cost Type:
	<b>my demo</b> Charge Code: Finish: 02/04/19 Cost Type:		<b>Schedule Pilot</b> Charge Code: Finish: 11/28/18 Cost Type:		<b>33</b> Charge Code: Finish: 01/15/19 Cost Type:	
	<b>aaaa</b> Charge Code: Finish: 02/14/19 Cost Type:					
<b>Initiating Process Complete</b> Duration: 0.00 Priority: 10.00 Task Owner: Training, Admin Parent: Deployment and Quality Phase	<b>Planning Phase</b> Charge Code: Planning Finish: 08/28/18 Cost Type: Operati...	<b>User Interface Develo...</b> Charge Code: Planning Finish: 09/28/18 Cost Type: Capital	<b>Closing Phase Compl...</b> Charge Code: Develop Finish: 07/17/18 Cost Type:		<b>Ongoing maintenance</b> Charge Code: Finish: 11/26/18 Cost Type:	
	<b>Database Development</b> Charge Code: Out of Office Finish: 09/25/18		<b>Approve Test plan</b> Charge Code: Finish: 11/26/18			

# Action Item Responder (AIR)



- Respond to action items from your email
- Supports any custom workflow
- Works wherever email works for desktop, mobile, and tablet

*Example Timesheet Submission*

Thu 8/31/2017 12:53 PM  
admin@ppmresponder.com  
[TS5096011][TL5001079] Timesheet Submitted: David Matzdorf [08/26/2017 - 09/01/2017]

To: Josh Leone

Dear Josh Leone,

Here is the timesheet for **David Matzdorf** for the time period of **08/26/2017 - 09/01/2017**

Investment	Task	Sat 08/26	Sun 08/27	Mon 08/28	Tue 08/29	Wed 08/30	Thu 08/31	Fri 09/01	Total
Acme Development Project	Acme Development Project			3	3	1	5	3	15
Acme Development Project	Core Development			2	4	4	1	1	12
Acme Development Project	UI Development			1	1	3	1	1	7
Acme Development Project	Database Development			5	2	3	1	1	12
Acme Development Project	Testing			2	1	4	2	1	10
<b>Total</b>				<b>13</b>	<b>11</b>	<b>15</b>	<b>10</b>	<b>7</b>	<b>56</b>

Approve Return

*Example Budget Submission*

Sun 8/31/2017 10:04 AM  
admin@ppmresponder.com  
Proposed Budget for: Replace Computers (ID23839)

To: Josh Leone

Dear Josh Leone,

A cost plan for **Replace Computers (ID23839)** has been submitted as a proposed budget. Below are the details:

**Project Manager:** Josh Leone  
**Description:** Replace all the computers in the IT department.  
**Overview:** The replacement plan includes all hardware and labor costs.

Cost Type	Transaction Class	2018	2019	2020	2021	Total
Capital	Hardware	\$250,000				\$250,000
Capital	Software	\$500,000				\$500,000
Capital	Internal Labor	\$100,000	\$500,000	\$500,000		\$1,100,000
Capital	External Labor	\$50,000	\$300,000	\$300,000		\$650,000
Operating	Travel Costs	\$20,000	\$20,000	\$20,000		\$60,000
Operating	External Labor		\$50,000	\$50,000	\$50,000	\$150,000
Operating	Internal Labor	\$0,000	\$50,000	\$200,000	\$200,000	\$550,000
<b>Total</b>		<b>\$970,000</b>	<b>\$920,000</b>	<b>\$1,070,000</b>	<b>\$250,000</b>	<b>\$3,210,000</b>

Approve Reject

# SQL Data Extractor



- Extract data using SQL language
- Create and schedule multiple extractions depending on business need
  - Files can be dropped to file server locations, the Clarity knowledge store or emailed out
- Flexible options
  - Batch data for large exports
  - Zip files
  - Custom separators
  - Date formats
- Performance metrics
  - The amount of data extracted
  - Time of extraction
  - Success Failures
- Test cases for extracts up to
  - 40 million records per day
  - 20 extracts per day

A screenshot of a software interface titled "Data Extract: Resource Extract - General - Properties". The interface is divided into two main sections. The left section, labeled "General", contains a "Name" field with the value "Resource Extract" and an "SQL" field with the query "select \* from smm\_resources". The right section contains various configuration options: "Active" (checked), "Data Warehouse Database" (unchecked), "Include Headers" (unchecked), "Output Filepath" (set to "/fs0/clarity/extracts/"), "Base Filename" (set to "resources\_"), "File Extension" (set to ".csv"), "File Date Format" (set to "yyyy-MM-dd"), "Separator" (set to a comma), "Embed in Double Quotes" (checked), "Batch Size" (empty field), and "Compress" (checked).

# Data Importer



- Universal Importer
  - CSV, Excel, REST
- Used of 90% of all incoming Rego built interfaces
- Purely configuration based
- Flexible options
  - Chain workflows
  - Portal support
  - Robust data validations
  - File batch support
  - Files can be zipped
  - File encryption support

The screenshot shows the 'Properties' tab of the 'Data Processor: Transaction Interface' configuration window. The 'Data Action' is 'Import File Data'. The configuration is organized into three main sections: General, Staging Object, and File.

**General Section:**

- ID: DPA000045
- Name: Import File Data
- Action Type: File Data Import
- Sort Order: 100.00
- Is Active: ☒
- Commit: ☒
- Print Results to Console: ☒
- Allow Exception: ☐
- Break after Completion: ☐
- Description: Find file(s) to process, and import their data into a staging object.

**Staging Object Section:**

- Staging Object Name: Transaction Staging
- Staging Object ID: rego\_trans\_staging
- Field Prefix: rego\_
- Import Type: Unique Batch

**File Section:**

- File Path: C:\Users\dmatz\Documents\General\Data Processor\Transaction Interface
- File Name Prefix: Transactions
- File Prefix Option: Starts With
- File Extension: .dat
- File Date Stamp Format:
- Compressed File(s): ☐
- File(s) To Process: All Files
- File Already Processed: Skip File
- File Delimiter: |
- File First Data Row: 1
- Data Embedded Character:
- Null Placeholder:
- Import Error Options: Stop Importing - Rollback
- Fail if No Files Found: ☐
- Fail on Zero Imports: ☐
- File Archive Directory:
- Delete File(s): [--Select--]

Buttons at the bottom: Save, Save And Return, Return.

Legend: ☒ = Required, ☒ = Enter Once, \* = Unique

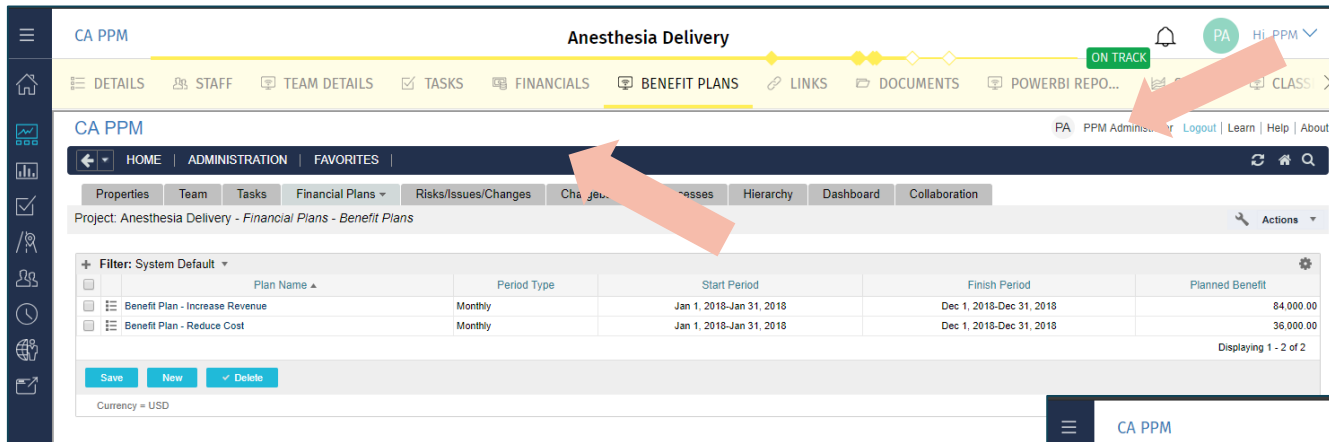
# Channel Pack



18

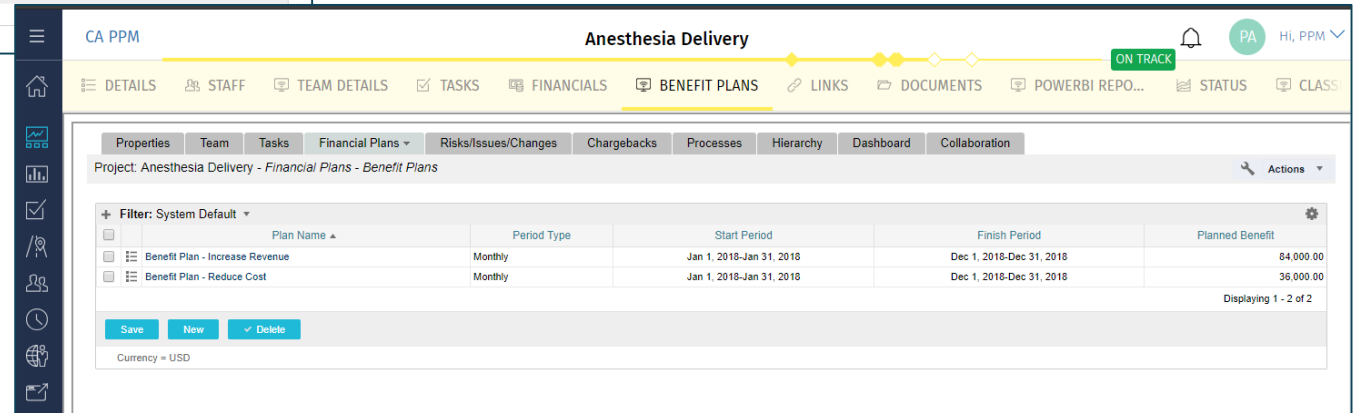
- Bring the classic Clarity pages into the Modern UX with an optimized screen layout

Without the Channel pack



Duplicate header and navigation bars make for a confusing end user experience

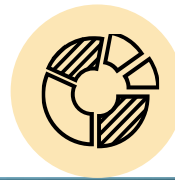
Optimized screen experience





# Rego Innovations: Reporting and Business Intelligence

# Jasper Report Bursting



- Schedule bursts of reports to run at a set time, delivered to specific groups of people.

Report Bursting List List					
+ Filter: None ▾					
<input type="checkbox"/>	Active	Name ▲	Start Date	Last Run Date	Log Message
<input type="checkbox"/>		Program Forecast (Market Research)	5/29/18 2:00 AM		
<input checked="" type="checkbox"/>	✓	Project Storyboard (Joshs Team)	5/28/18 2:00 AM		
<input checked="" type="checkbox"/>	✓	Resource Utilization	5/17/18 1:45 PM		
Displaying 1 - 3 of 3					
Save New Report Bursting List ✓ Delete					

**General**

✚ Name

✚ Report Path

✚ Recurrence Type

✚ Start Date

Export Type

Burst By

File Name

Time Stamp ☒   
 ( FileNameYYYYMMDDHHMM )

✚ Recurrence Type

✚ Start Date

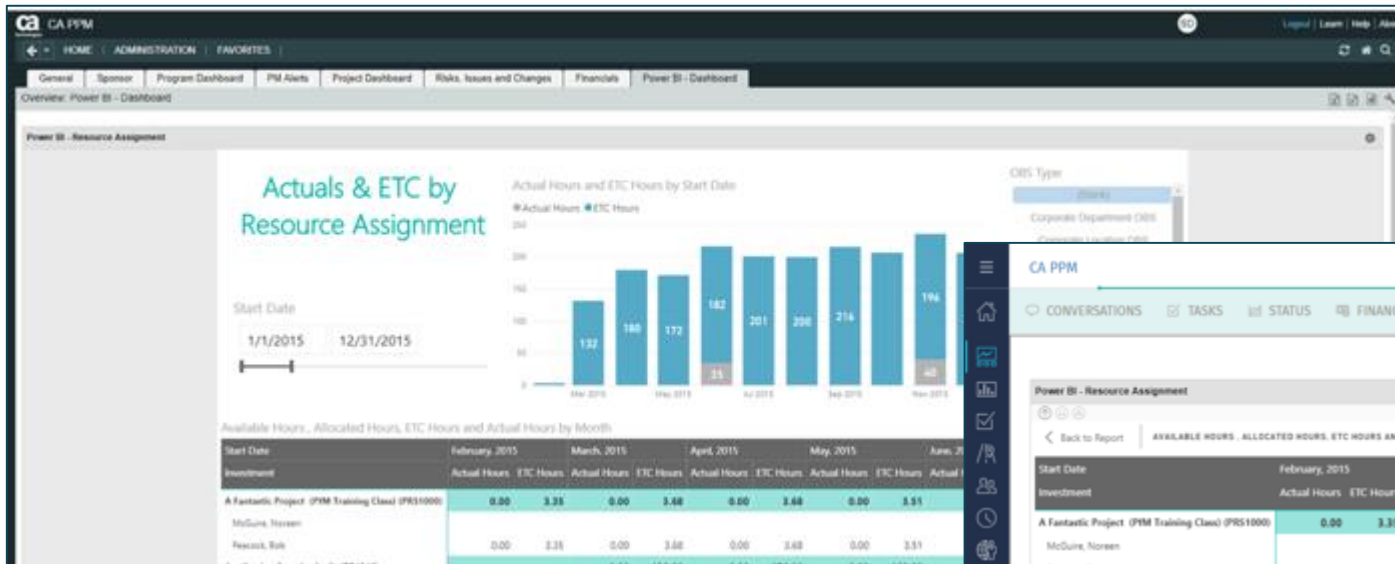
Export Type

Burst By

File Name

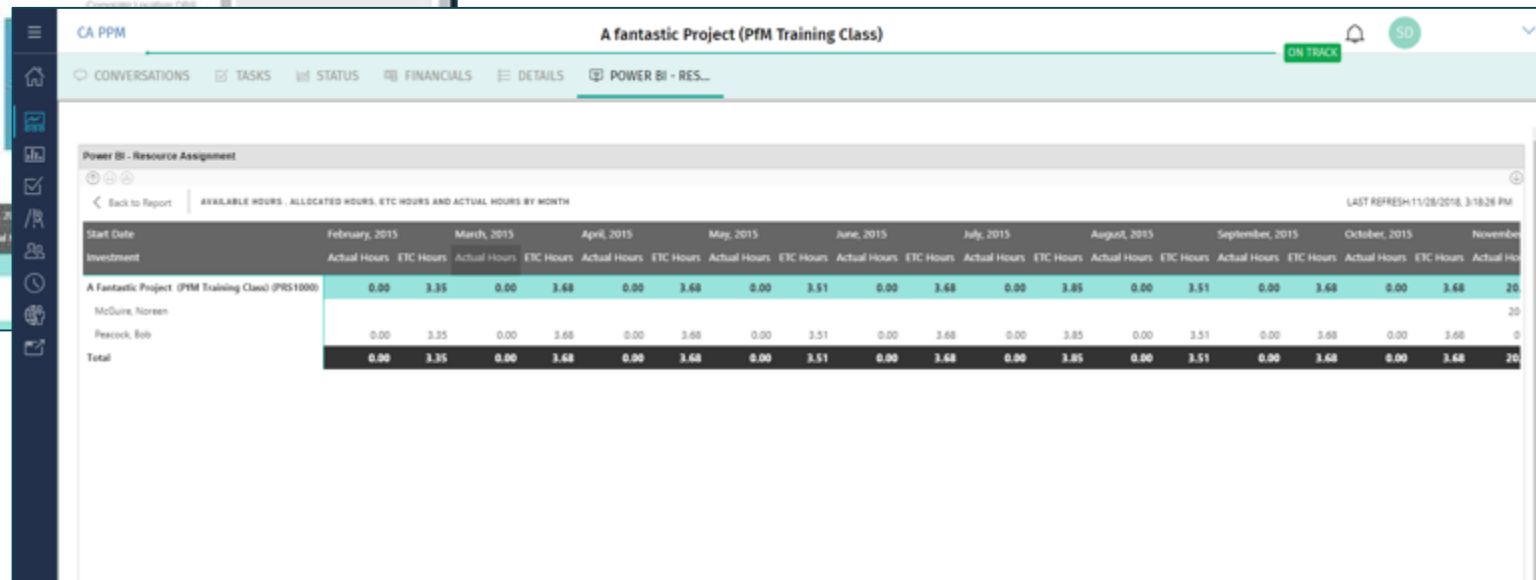
# Embedded Power BI

- Display live Power BI Reports in the Classic UI and the Modern UX. Clarity users do not need to be in the Power BI service.



Classic UI

Modern UX



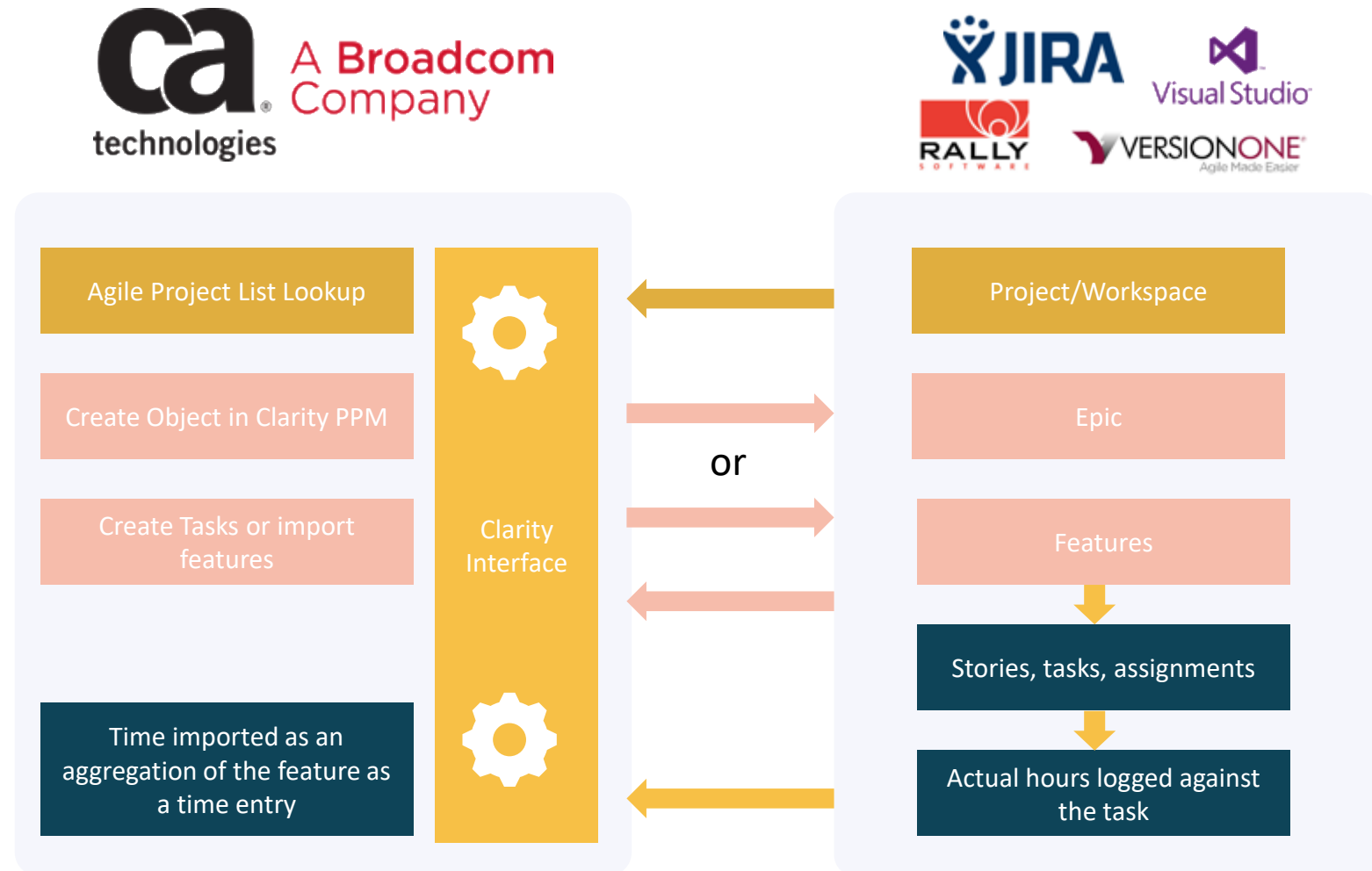
# Rego Standard Integrations

# Agile Integrations

- 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

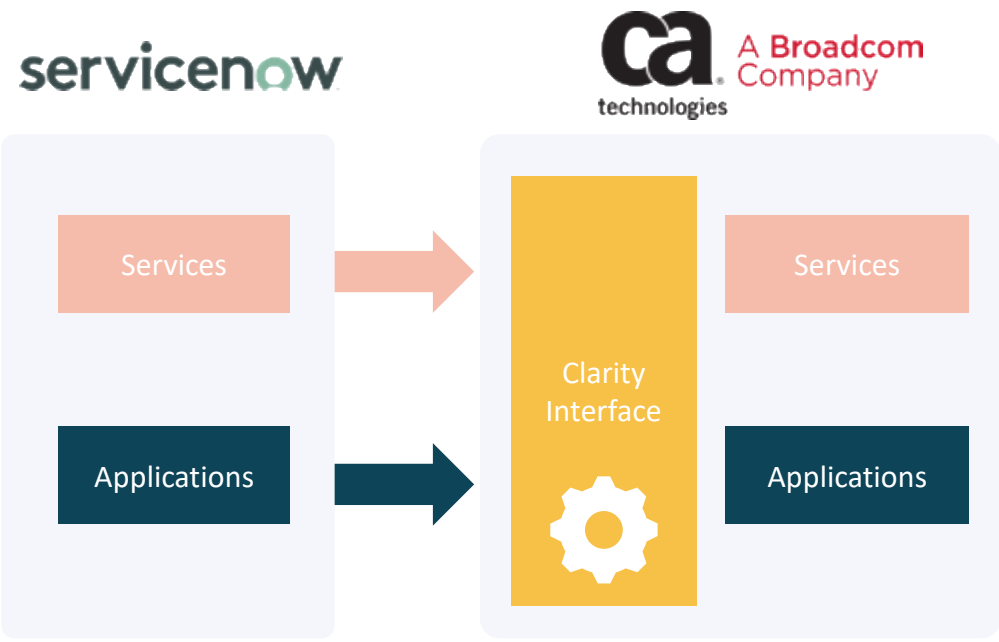
Content
<b>Intro</b> <ul style="list-style-type: none"> <li>Kick-off</li> <li>Workshop purpose/agenda review</li> <li>How we'll do this</li> <li>Critical success criteria</li> </ul>
<b>Review Objectives/Stories</b> <ul style="list-style-type: none"> <li>Review submitted user stories (if applicable)</li> </ul>
<b>Mapping</b> <ul style="list-style-type: none"> <li>Project level</li> <li>Task level</li> <li>Attributes</li> </ul>
<b>Financials</b> <ul style="list-style-type: none"> <li>How do we calculate costs</li> <li>How do we differentiate capital/operating costs if needed</li> </ul>
<b>Resources</b> <ul style="list-style-type: none"> <li>How might resources/staffing be handled</li> </ul>

Content
<b>Time tracking</b> <ul style="list-style-type: none"> <li>Are there any deviations needed to the standard connector time-tracking approach</li> </ul>
<b>Reporting</b> <ul style="list-style-type: none"> <li>What metrics are needed</li> <li>What views/reports are needed</li> </ul>
<b>Exception processes</b> <ul style="list-style-type: none"> <li>How do we handle exceptions (i.e. story moves from one project to another, etc.)</li> <li>What is an error vs a warning</li> </ul>
<b>Data migration approach</b> <ul style="list-style-type: none"> <li>To go-live, how will we establish all of the connections for existing projects</li> </ul>
<b>Conclusion</b> <ul style="list-style-type: none"> <li>Review open items/parking lot</li> <li>Review captured stories</li> <li>Discuss next steps</li> </ul>

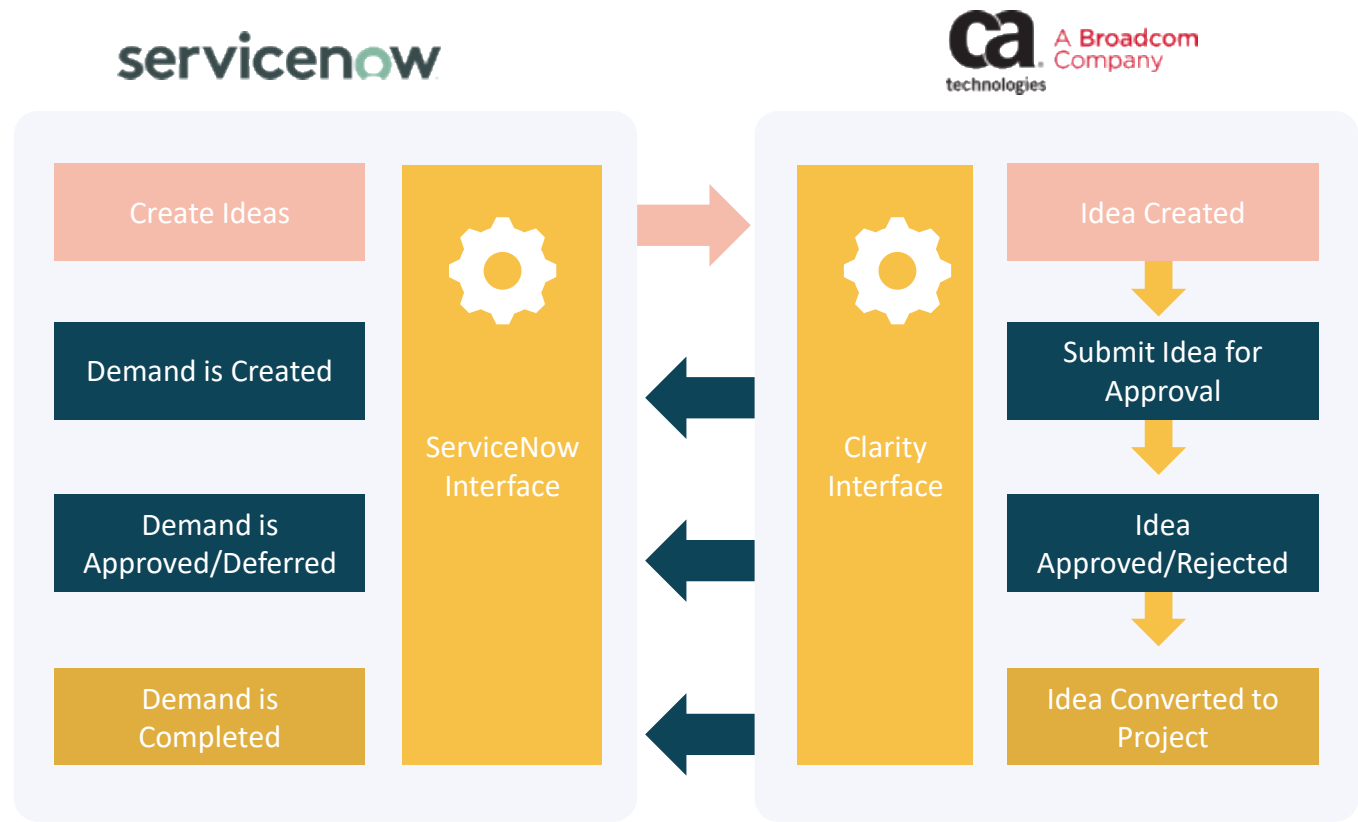




Services and Applications



Idea/Demand Integration



## Sync Salesforce opportunities to Clarity Ideas

Opportunity Edit Help for this Page

New Opportunity

Opportunity Edit Save Save & New Cancel

**Opportunity Information** = Required Information

Opportunity Owner: Yogesh R

Private: ☐

Opportunity Name: My new sales opportunity

Account Name:

Type: --None--

Lead Source: --None--

Amount:

Close Date: 3/6/2015 [3/6/2015]

Next Step:

Stage: Prospecting

Probability (%): 10

Primary Campaign Source:

**CA PPM Clarity Information**

Create in Clarity: ☒

Clarity Project Id:

Progress:

Created To Clarity On:  [3/6/2015 8:29 AM]

Last Sync On:  [3/6/2015 8:29 AM]

Do Not Sync: ☐

**Additional Information**

Order Number:

Current Generator(s):

Tracking Number:

Main Competitor(s):

Delivery/Installation Status: --None--

**Description Information**

Description:

Save Save & New Cancel

**Clarity PPM** Home Administration Favorites

Properties Team Tasks Financial Plans Risks/Issues/Changes Chargebacks Processes Hierarchy Dashboard Collaboration

Project: My new sales opportunity - Properties - Main - Project Summary Open in Scheduler Scenario

**Project Summary**

☒ Project Name: My new sales opportunity

☒ \*Project ID: P00628000001rxp9AAA

Project Type: [--Select--]

Project Category: [--Select--]

Objective:

Active: ☒

**Stakeholders**

Project Manager: Renapure, Yogesh

Business Owner:

Project Management Office:

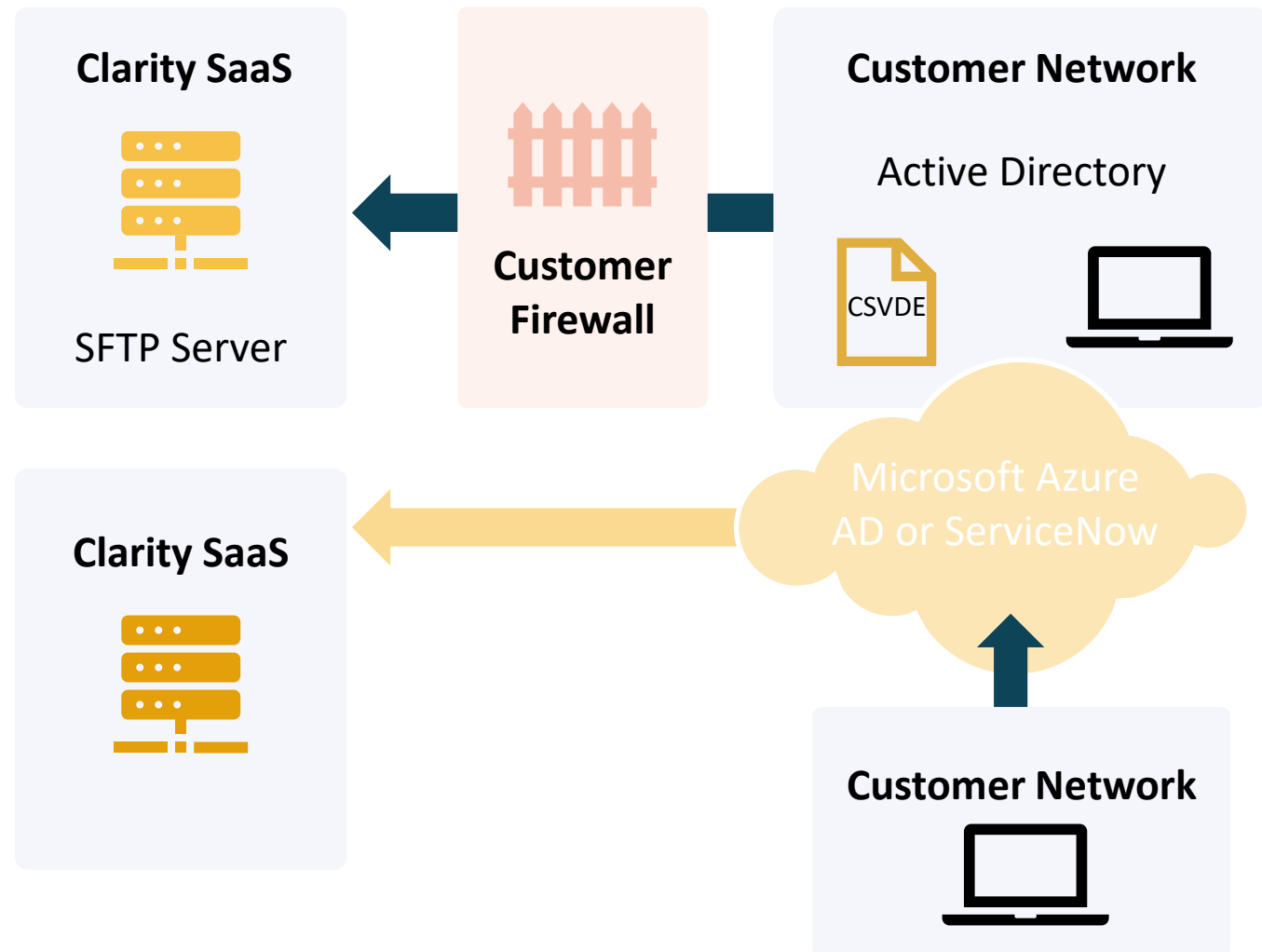
Finance and Governance:

Save Save And Return Return

= Required \* = Unique

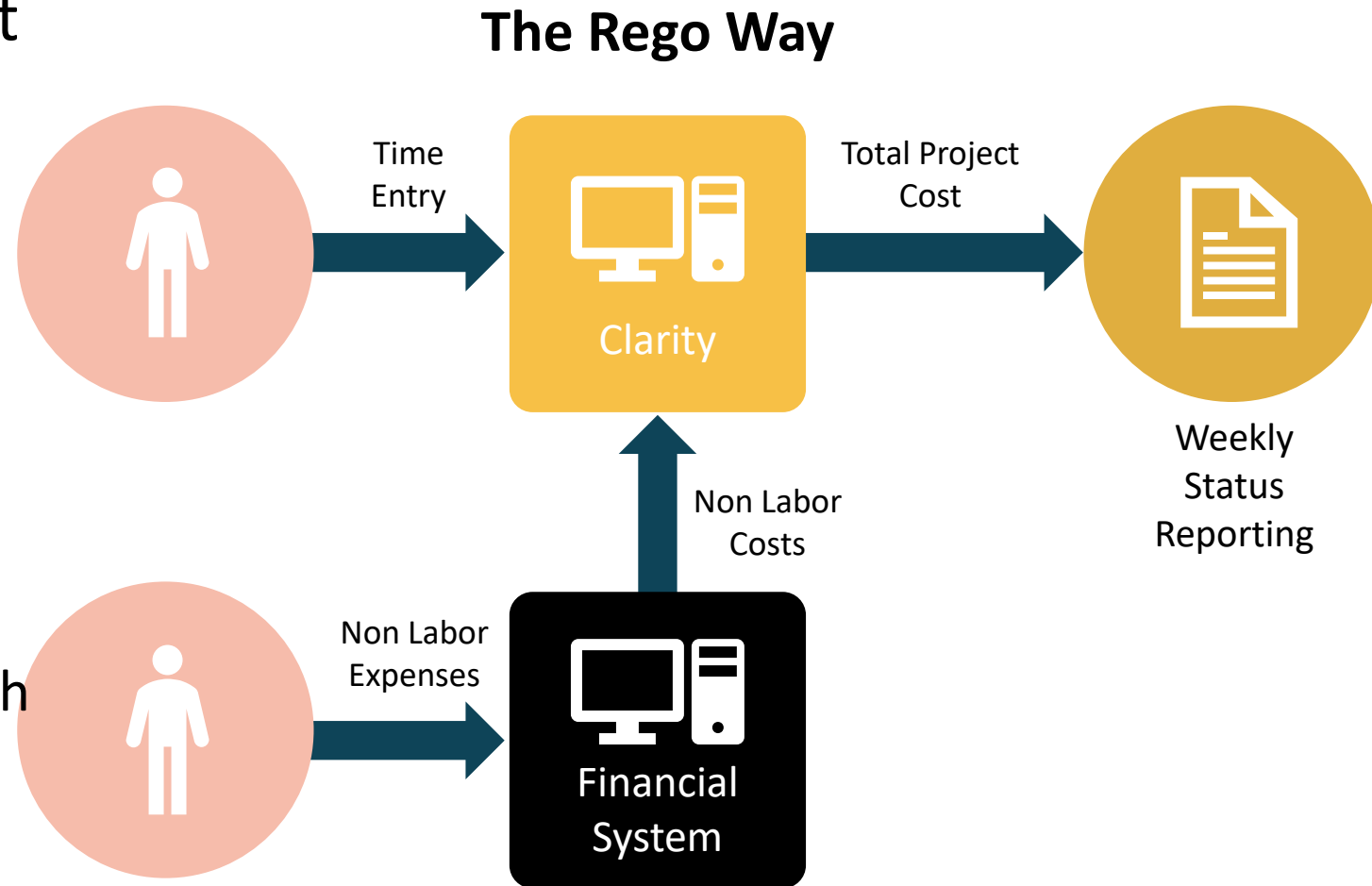
# Clarity HR/Resource Interface

- Multiple options
  - Flat file consumption
  - Azure Active Directory (API based)
  - ServiceNow (API based)
- Support for the CA Portal
  - Can additionally add users to the CA Portal



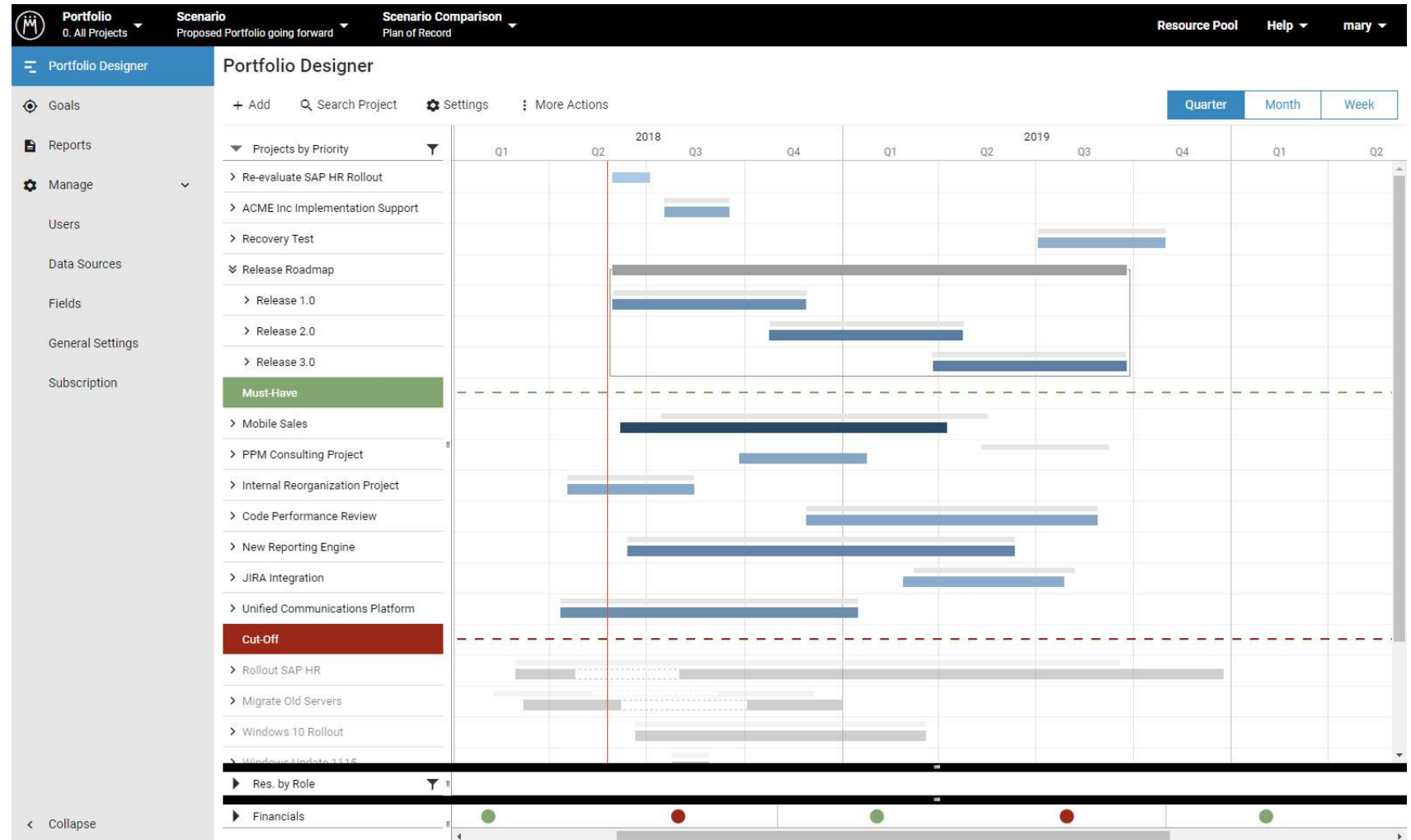
# Financials Interface

- Import interface or attachment option
  - Automated or manual
  - CSV file based
- Basic business rules included
  - Valid object mappings
  - Non-zero amounts
- Reporting portlets included
  - Project Cost by Vendor by Month
  - Cost by Project by Month
  - Transaction Details



# Meisterplan – Advanced Portfolio Management

- Manage portfolio scenarios
- Edit resource allocations
- View over allocated resources
- Manage project timelines
- Manage milestones and dependencies
- Use the OOTB integration or the Rego GEL based integration for additional flexibility





# RegoXchange

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Let Rego be your guide.

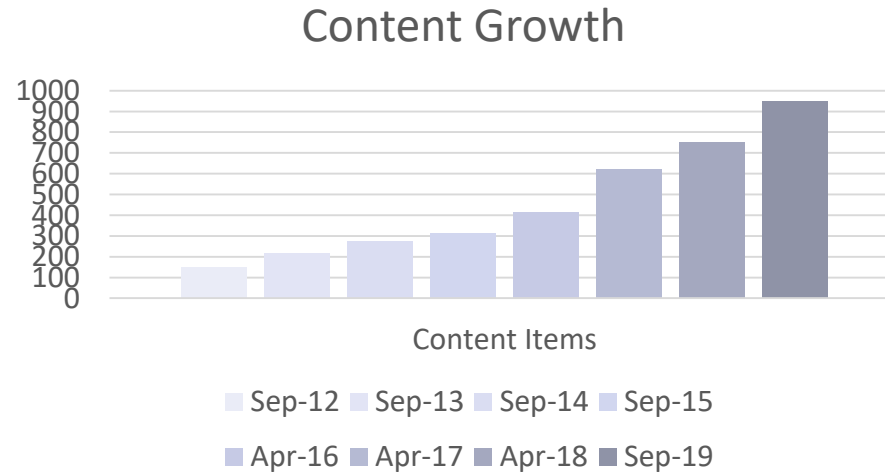
# RegoXchange - Reuse of Existing Solutions

- [www.regoxchange.com](http://www.regoxchange.com)
- Revolutionary knowledge-sharing application – a “co-op” or Shareware site containing hundreds of ready-to-use solutions including portlets, reports, processes, training material, etc.
- Populated with content that Rego has built over the past 12 years
- Library constantly grows (at least 1 new content item added every week)
- Low annual subscription fee will provide unlimited access to the entire RegoXchange library (1,000+ solutions)



# regoXchange: Quick Overview

- The regoXchange went live 7 years ago and started with about 150 content items





- The user base consists of more than 2800 individuals representing more than 950 companies
- There are two content libraries, theBasiX (2/3 free content), and theWorX (1/3 available with subscription)


# 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 Tick

  
Training Docs

  
Training Video

  
Work Flow

### Keyword

Search

Clear Filters

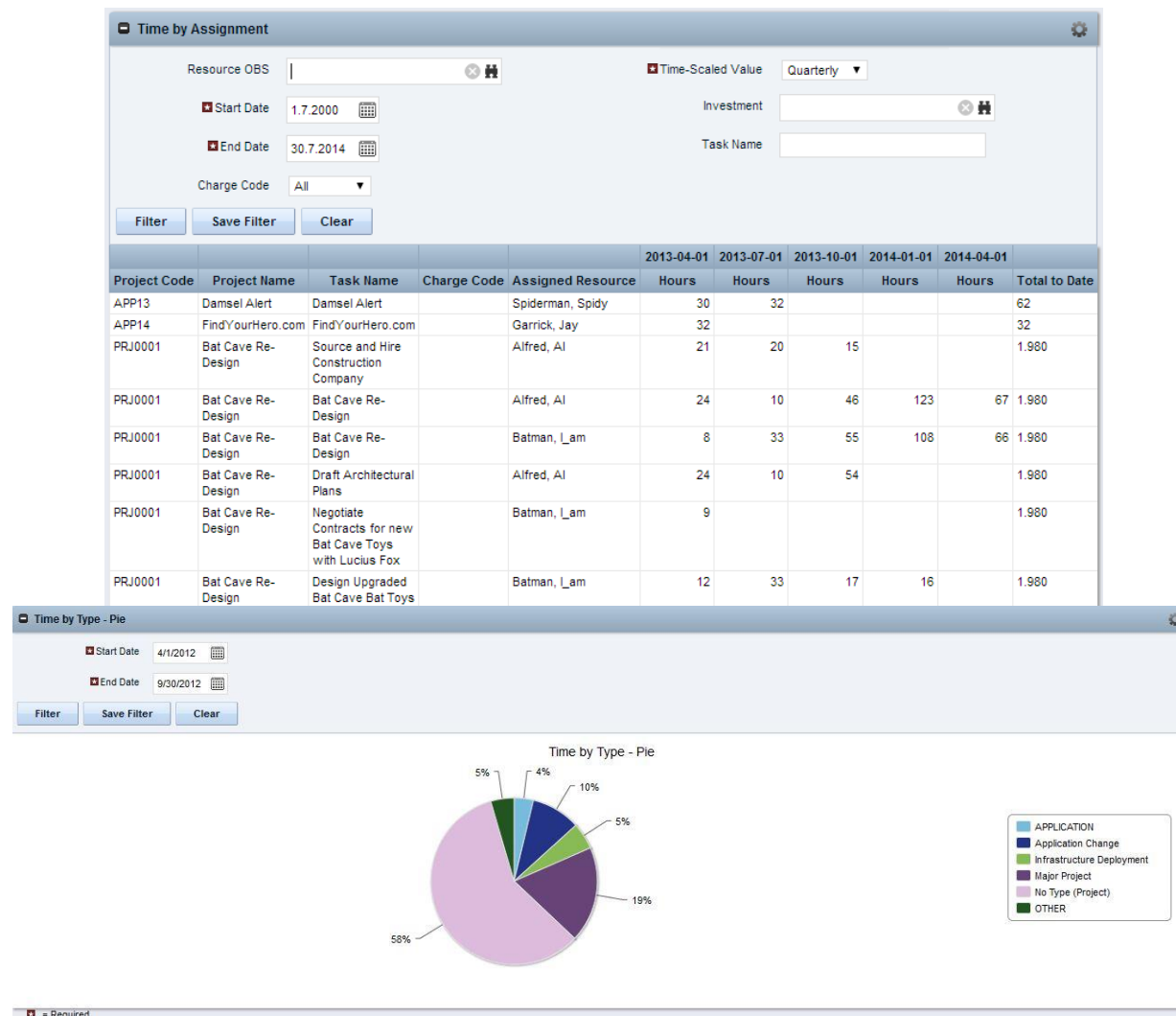
Need Help? Ask the Rego Librarian

# Content Highlights

Portlets: Examples 2 of 200+

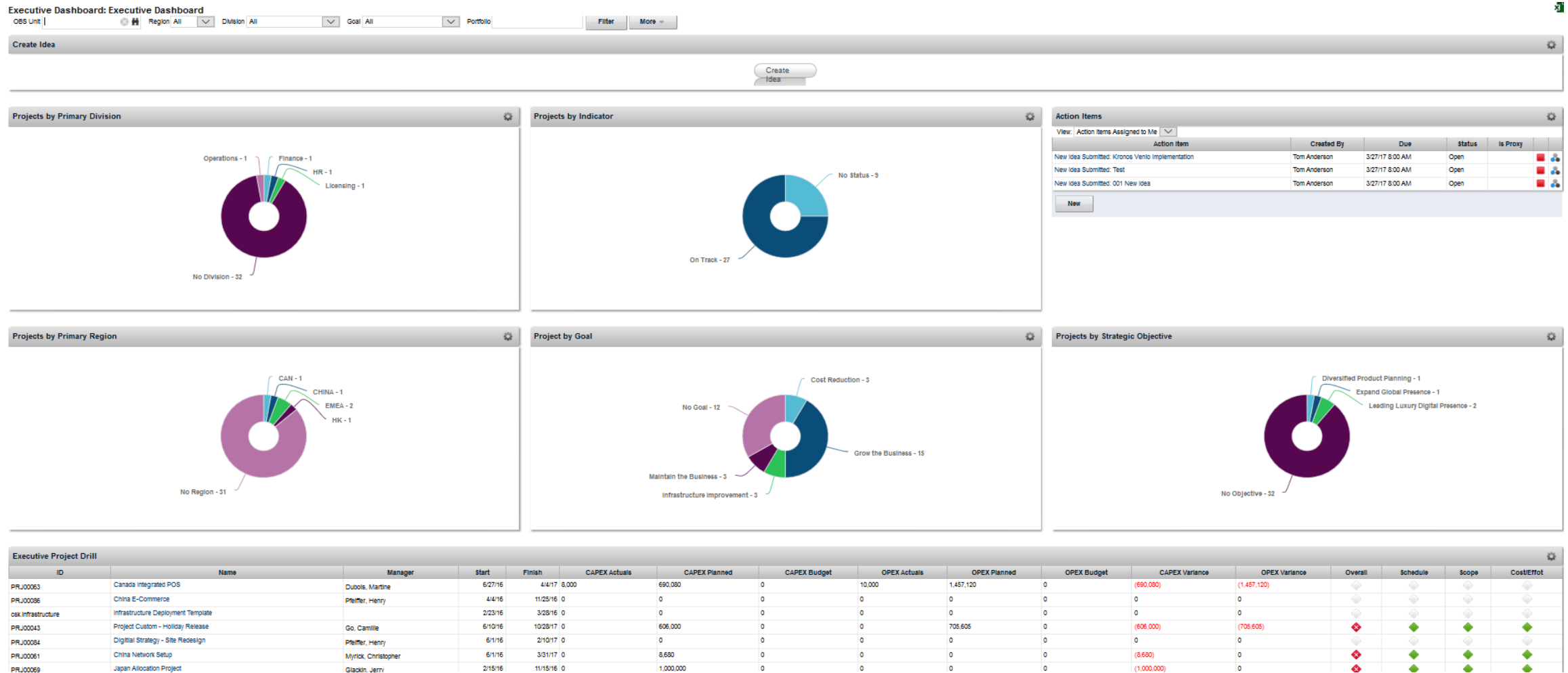
# Portlets: Time by...

- 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: Executive Drill Down Portlets





# Content Highlights


Workflow Processes: Examples 4 of 65+



# Workflows: Project Compliance Stalker - PM

Clarity - Project Compliance

Inbox x

 clarity@ca.com <clarity@ca.com>  
to chris

1:53 PM (1 minute ago) ☆  

**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
<a href="#">PR9232</a>	Deploy Windows 7	<a href="#">18</a>			<a href="#">No Status Reports created</a>	19
<a href="#">PRJ03</a>	Create Webcam Conference	<a href="#">3</a>	<a href="#">1</a>	<a href="#">2</a>	<a href="#">No Status Reports created</a>	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: Time Validation to PMs

Mon 7/24/2017 7:00 PM

**Cerner - Deployment to IP and Consulting: PLEASE REVIEW time tracked last week**

To  Daniel Greer


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
Chouhan, Vipin	INT: Cons Get PNs R1	2.0
Chouhan, Vipin	INT: Proj Roles	4.0
Garvey, Sara	CONR1: Training Materials (PPT, 15 Videos, 4 QRG)	4.0
Gillespie, Mike	Gov: Project/Account Management (6 hrs/week)	10.0
Greer, Daniel	Gov: Project/Account Management (6 hrs/week)	5.0
Karunakaran, Nadarajah	CONR1: Configuration Items (Portlet/WF/Objects/Security)	0.5
Meyers, Michael	CONR1: Training Materials (PPT, 15 Videos, 4 QRG)	4.5
Renapure, Yogesh	Gov: Project/Account Management (6 hrs/week)	2.5
Rinella, Jenn	Con R2: MSP Support and Testing	0.5
Schmenk, Ann	CONR1: Training Materials (PPT, 15 Videos, 4 QRG)	0.5

# Workflows: Weekly PM Reminder

Project Manager :: Weekly Email Reminder

 **sayantan.gupta@regoconsulting.com** <regodevsys@gmail.com>  
 Sayantan Gupta  
 Tuesday, October 17, 2017 at 8:49 AM  
[Show Details](#)

Dear Chris Wuenstel,

Below are the consolidated reminders:

Past Due Issues:				
Project		Target Date	Priority	Flag
<a href="#">PRJ0185</a> - Admin - Technical Environment Training Admin - Technical Environmvery long text	<a href="#">1</a>	17-SEP-2015	Low	Red
<a href="#">PRJ0012</a> - Create Secret Identity	<a href="#">Manager Hates Me</a>	17-APR-2013	Low	Red
Past Due Risks				
<a href="#">PRJ0185</a> - Admin - Technical Environment Training Admin - Technical Environmvery long text	<a href="#">r1</a>	17-SEP-2015	Medium	Red
<a href="#">PRJ0012</a> - Create Secret Identity	<a href="#">Lose Powers</a>	05-DEC-2013	Low	Red
<a href="#">PRJ0012</a> - Create Secret Identity	<a href="#">Somebody Knows Who I Am</a>	05-DEC-2013	High	Red
<a href="#">PRJ0012</a> - Create Secret Identity	<a href="#">Lose Job</a>	17-APR-2013	High	Red
Past Due Status Report:				
Project	Status Report	Most Recent	Overall Status	Flag
<a href="#">PRJ0012</a> - Create Secret Identity	<a href="#">Status on 5/24</a>	24-MAY-2013	Critical	Red
<a href="#">PRJ0076</a> - Another Sharepoint Test	<a href="#">test</a>	02-SEP-2014		Red
<a href="#">PRJ0185</a> - Admin - Technical Environment Training Admin - Technical Environmvery long text	<a href="#">Status 0001</a>	15-SEP-2015		Red
<a href="#">PRJ0034</a> - JD - Test Project				Red
<a href="#">PRJ0135</a> - Milestone Type Test				Red
<a href="#">PRJ0075</a> - Sharepoint Project Test				Red

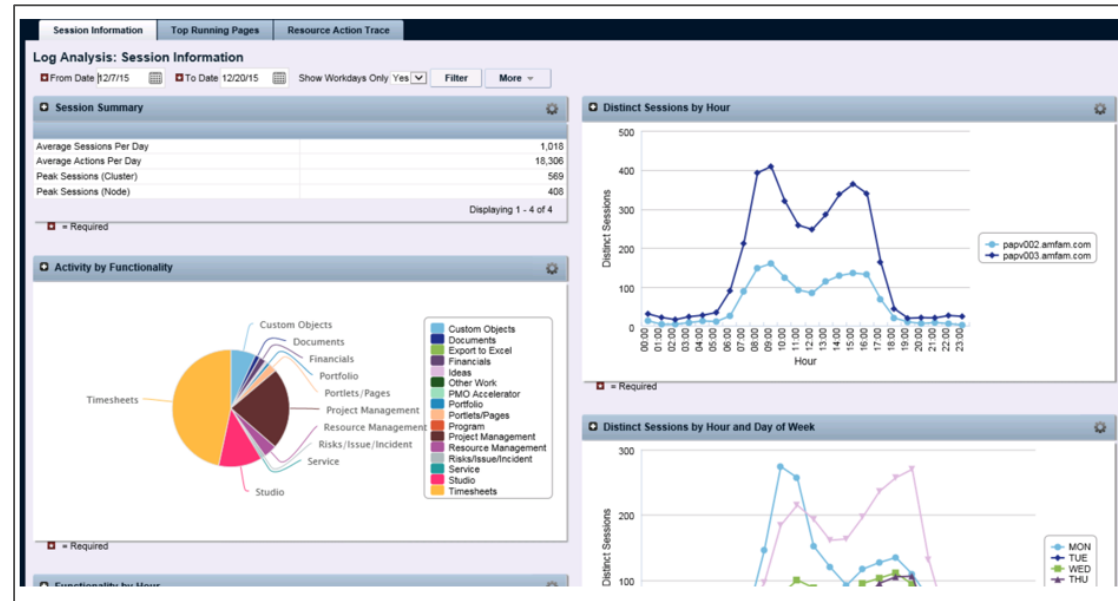


# Content Highlights

Xchange+

# Modules

- Business Transformation
- Performance Monitoring
- Adoption Metrics
- Contract Management
- Estimation





## 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 | [regoconsulting.com](http://regoconsulting.com)

# Content Highlights

Training: Documents and Videos (200+ Files)

# Rego Base Training: Released in Fall 2015

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

# Introduction To Clarity Video Series: V14.2+

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## Classic UI

### Module 1

- Clarity 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

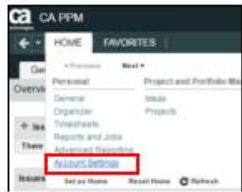
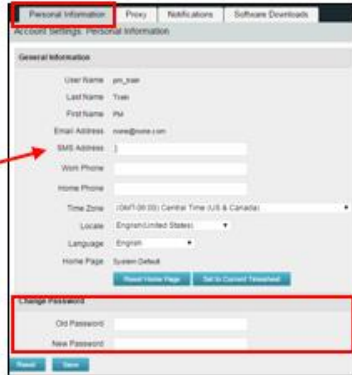
- Portlets vs. Reports, Running a Report

# Quick Reference Cards

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

## CA PPM Quick Reference Card

### ✓ Account Settings

Instructions	Screen
<p><b>Account Settings</b> provides quick access to your CA PPM profile.</p> <p>From the <b>Home</b> menu, under <b>Personal</b>, click <b>Account Settings</b>.</p>	
<p>The first tab is <b>Personal Information</b> 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 <b>SMS address</b>, and then click <b>Save</b>.</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><b>Tips:</b> CA PPM supports multiple languages, select your <b>Language</b> from the drop-down and click <b>Save</b>. You can also set your <b>Home Page</b> to the current week's timesheet.</p>



# Content Highlights

Jasper and PowerBI Reports

PowerBI Dashboards

# Reports

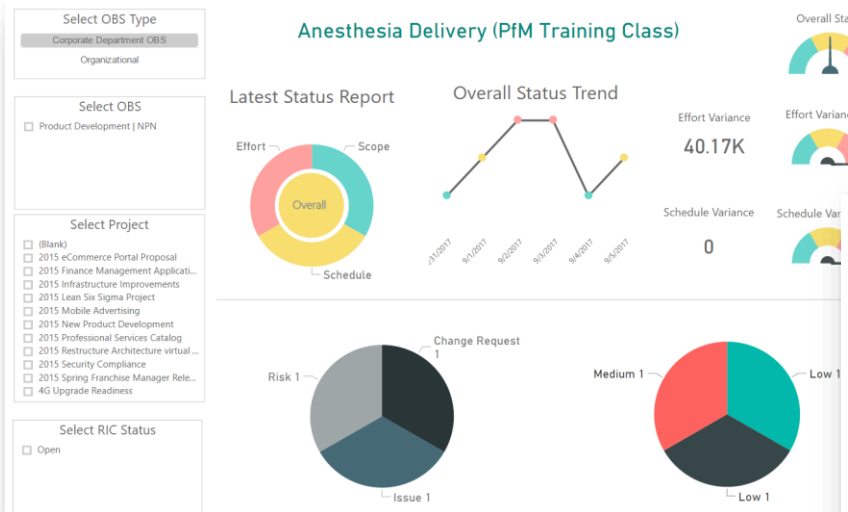
## Reporting options for both Jasper and PowerBI – Most popular

- Project Count by Stage (JS/PBI)
- Projects by Status Indicator - Pie (JS)
- Projects within Baseline Finish (JS)
- Project Budget vs Planned vs Actual by Mon. (JS/PBI)
- All Issues (JS/PBI)
- All Tasks (JS/PBI)
- All Assignments (JS/PBI)
- Time by Investment (JS)
- Project Status and Costs (JS/PBI)
- Data Issues - Projects (JS)
- Capacity Graph (JS/PBI)
- Project Time Summary (JS/PBI)
- Assignment by Task Over Time (JS)
- Project Cost Within Budget (JS/PBI)
- Projects by Stage and Manager (JS/PBI)
- Allocation Compliance by Mon. Pie Chart (JS/PBI)
- Allocation Compliance by Mon. Area Chart (JS)
- Time by Stage and Timescale – Graph (JS)
- Time by Stage and Timescale – Grid (JS)
- Ideas by Stage (JS)
- Ideas by Priority – Pie (JS)
- Ideas by Department – Pie (JS)
- Ideas by Business Unit – Pie (JS)
- All Change Requests (JS/PBI)
- Late Tasks with Assignments (JS)
- All Risks (JS/PBI)
- Time by Task (JS)
- Time by Assignment (JS)
- Resource Availability - 4 Weeks (JS)
- Allocation Compliance for PM (JS/PBI)
- Allocation Compliance Pie Chart (JS)

Over 40 reports now in PowerBi!

# PowerBI Reports - Examples

49



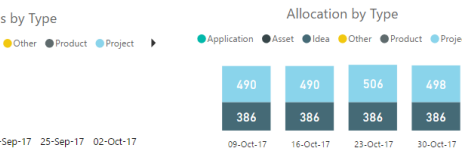
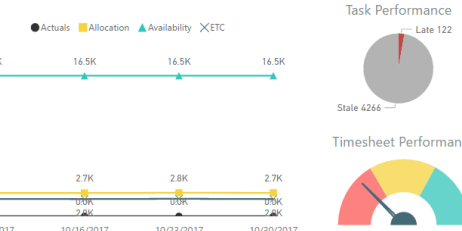
Investment ID	Investment Name	Risk Name	Investment Manager	Risk ID	Owner	Status	Priority	Target Resolution Date
PN1011	Anesthesia Delivery (PfM Training Class)	Test Risk Objectives	Tennison, Peter	RS1077	Joshi, Navdeep	Open	Medium	Friday, October 23, 2015
PR1016	Automated Security Enhancements	Key Resource not available	Berks, Paul	RS1073	Administrator, System	Open	High	Saturday, October 10, 2015
PR1052	Test-MK	Requirements to be freed on time	Administrator, System	RS1074	Administrator, System	Open	High	Tuesday, October 13, 2015
PR1052	Test-MK	Resource availability	Administrator, System	RS1075	Administrator, System	Open	Medium	Tuesday, October 13, 2015
PR1083	JH Project-Financial Mgmt Overview	Risk 1	Hoaldrige, Jon	RS1082	Hoaldrige, Jon	Open	High	Thursday, February 11, 2016
PR1083	JH Project-Financial Mgmt Overview	Risk 2	Hoaldrige, Jon	RS1083	Hoaldrige, Jon	Closed	Low	Thursday, February 11, 2016
PR1114	Bigfish Automation (PfM Training Class)	may run over allocated budget	Scarlato, Jennifer	RS1084	Calderon, Mindy	Open	High	Friday, June 3, 2016
PR1165	CLR Demo Project	new risk	Rice, Christi	RS1085	Rice, Christi	WIP	Medium	Monday, April 24, 2017
PR51000	A Fantastic Project (PfM Training Class)	High Risk Sample	Flanagan, Christopher	RS1080	Administrator, System	Open	High	Tuesday, November 10, 2015
PR51000	A Fantastic Project (PfM Training Class)	Low Risk Sample	Flanagan, Christopher	RS1078	Administrator, System	Open	Low	Tuesday, November 10, 2015

## Adams, Benjamin

TASK_NAME	ASSIGNMENT...	START_DATE	FINISH_DATE
Barney Enhancements (PfM Train...	Not Started	01-Jan-13	29-Dec-17
MRI Redesign	Not Started	02-Apr-15	10-May-19
Ultrasound V5010 Project	Not Started	08-Apr-15	17-Jul-18
Idea Evaluation	Not Started	15-Apr-15	24-Jul-18
Defibrillator Improvements	Not Started	17-Apr-15	27-Jul-18
Ultrasound V5010 Project	Started	01-Jun-15	17-Jul-18
Crusader Photogrammetry and 3...	Not Started	01-Oct-15	01-Jun-18
Deepmind Augmented Reality a...	Not Started	01-Oct-15	31-Dec-19
Odyssey (PfM Training Class)	Not Started	01-Oct-15	31-Dec-19
Cloud Pathfinder (PfM Training C...	Not Started	01-Jan-16	29-Dec-17
Ira Upgrade (PfM Training Class)	Not Started	01-Jan-16	01-Jun-18

Issues	Risks	Demands
5	11	110

Investment ID	Issue ID	Issue Name	Target Resolution Date	Probability	Priority
PR1052	IS1089	Requirements to be freed on time		Low	Low
PN1011	IS1090	Test Issue Objectives from Risk	23-Oct-15		Low
PR1083	IS1091	Risk 1 to Issue 1	11-Feb-16		High
PR1084	IS1092	a1spodgajidj	27-Apr-16		Low
PR1165	IS1094	new issue from the risk	24-Apr-17		Medium



Investment ID	Risk ID	Risk Name	Target Resolution Date	Probability	Priority
PR1016	RS1073	Key Resource not available	10-Oct-15	Low	High
PR1052	RS1074	Requirements to be freed on time	13-Oct-15	Medium	High
PR1052	RS1075	Resource availability	13-Oct-15	High	Medium
PN1011	RS1077	Test Risk Objectives	23-Oct-15	High	Medium
PR51000	RS1078	Low Risk Sample	10-Nov-15	Low	Low
PR51000	RS1079	Medium Risk Sample	10-Nov-15	Medium	Medium
PR51000	RS1080	High Risk Sample	10-Nov-15	High	High
PR1083	RS1082	Risk 1	11-Feb-16	Medium	High

Late Milestones

OBS Type

Corporate Department

OBS Path

All

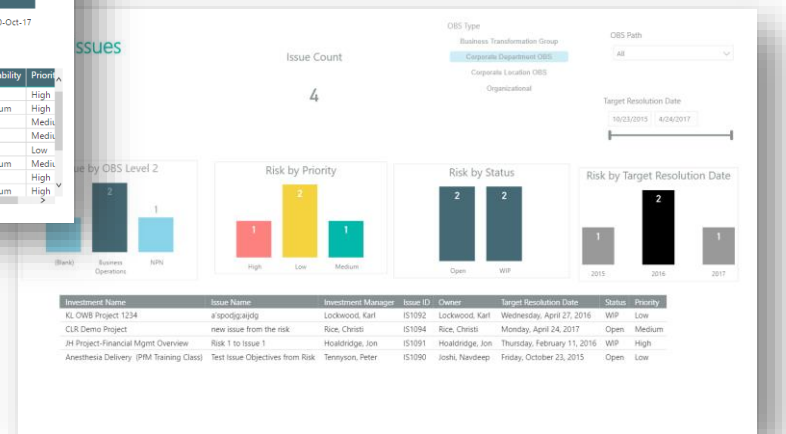
Investment Manager

All

Investment Name

All

Investment ID	Investment Name	Milestone Name	Investment Manager	Status	Start Date	Finish Date	Open Date	Days Left
PR51000	A Fantastic Project (PfM Tr...	Analyze Phase Complete	Flanagan, Christopher	Not Started	Monday, April 20, 2015	Friday, May 8, 2015		819
PR1012	Atropia Retina Scan - Proj...	Business Case Complete and Go to Development	Miles, Paul	Not Started	Monday, April 13, 2015	Monday, April 13, 2015		844
PR1002	Aurascopes XA - Project	Business Case Complete and Go to Development	Miles, Paul	Not Started	Monday, August 10, 2015	Monday, August 10, 2015		723
PR1003	Brighlight 3000 - Project	Business Case Complete and Go to Development	Miles, Paul	Not Started	Friday, October 9, 2015	Friday, October 9, 2015		665
Diagnostic ECG - Project	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Thursday, September 10, 2015	Thursday, September 10, 2015		694	
Echo Cardiography 3000 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Thursday, September 10, 2015	Thursday, September 10, 2015		694	
Fluorescein Imaging 1000 - ...	Business Case Complete and Go to Development	Miles, Paul	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015		724	
Megaflex 4000 - Project	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015		724	
Molecular Imaging 4000 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015		724	
Molecular Imaging 4000 - ...	Business Case Complete and Go to Development	Nunes, Angie	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015		724	
Molecular Imaging 4000 - ...	Business Case Complete and Go to Development	Tennison, Peter	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015		724	
Nuclear Cardiology 2200 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015		724	
PET 4x - Project	Business Case Complete and Go to Development	Craig, Allen	Not Started	Tuesday, June 9, 2015	Tuesday, June 9, 2015		787	
Summa XT - Project	Business Case Complete and Go to Development	Miles, Paul	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015		724	
Ultrasound V4000 - Project	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015		724	
Ultrasonix 2000 - Project	Business Case Complete and Go to Development	Craig, Allen	Not Started	Monday, November 9, 2015	Monday, November 9, 2015		434	
2015 eCommerce Portal Pr...	Closing Phase Gate Complete	Arya, Vishal	Not Started	Friday, February 19, 2016	Friday, February 19, 2016		532	
4G Upgrade Readiness	Closing Phase Gate Complete	Reed, Harry	Not Started	Tuesday, September 15, 2015	Tuesday, September 15, 2015		689	
Automated Security Enhanc...	Closing Phase Gate Complete	Berks, Paul	Not Started	Thursday, September 17, 2015	Thursday, September 17, 2015		687	

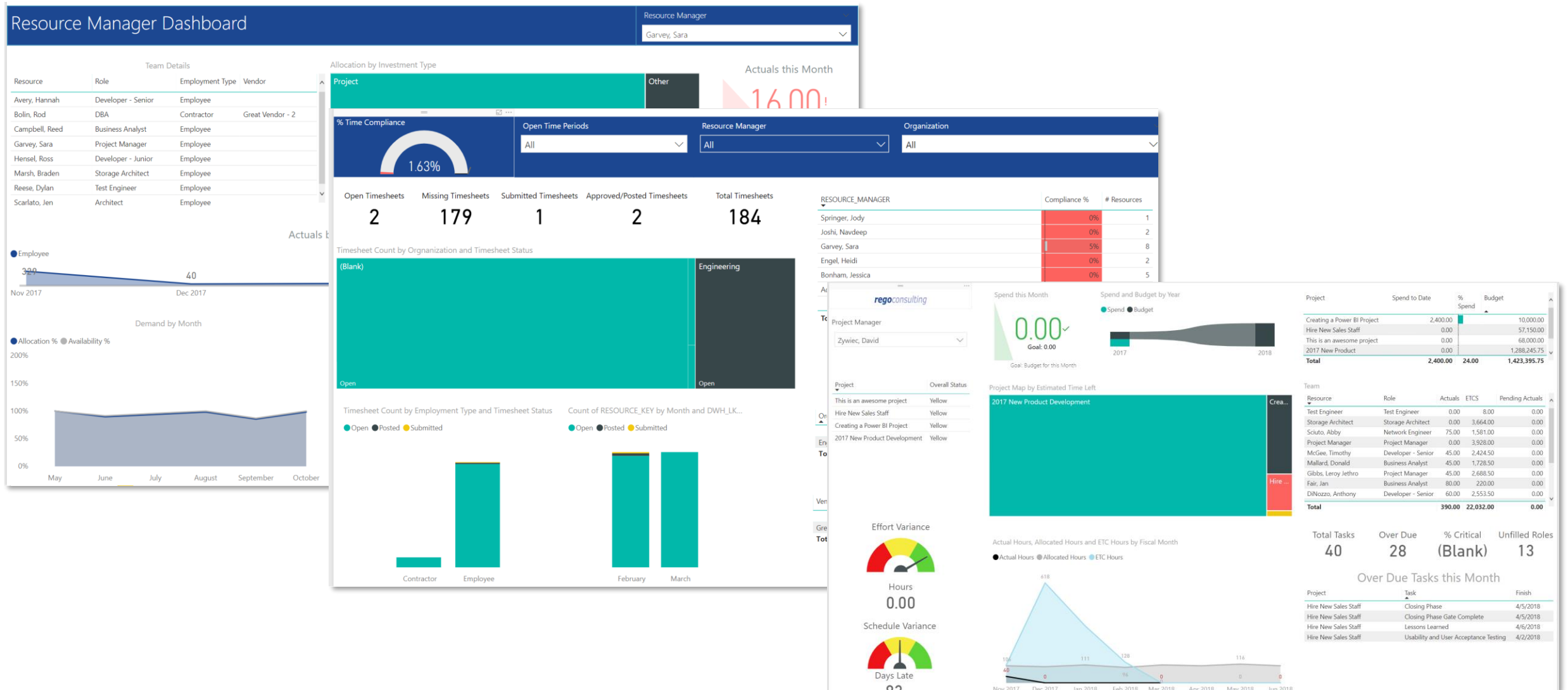


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regoUniversity 2019

# PowerBI Dashboards

50



Let Rego be your guide.

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# Questions?



*rego*University 2019  
SAN DIEGO

Let Rego be your guide.

# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at [pmi.org](http://pmi.org)
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- 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**



Let us know how we can improve!  
Don't forget to fill out the class survey.



### Phone

888.813.0444



### Email

[info@regouniversity.com](mailto:info@regouniversity.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)