regoUniversity 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

- 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

- 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

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Let Rego be your guide.

ITSM	Intake and Collaboration	Applications	Vendor and Time Management	Project and Resource Management
servicenow	salesforce	SharePoint	SAP Fieldglass	Project
cherwell	Excel	Troux Insight	Beeline	smartsheet
Appian	servicenow		KRONOS	SharePoint
bmc Remedy	Microsoft Teams		ADP	MEISTERPLAN
	HubSpot			Outlook
	slack			itdesign ARP
	Microsoft Flow			

regoLink

Innovation and integrations for Clarity

- Wagile Board
- Action Item Responder
- Enhanced MSP Integration
- SQL Data Extractor
- Channel Pack
- Roadmap Printer

Agile Integrations

- servicenow
- JIRA
- COLLABNET VERSIONONE
- Visual Studio Team Foundation Server
- RALLY Agile Central

HR/Resource/Financial

- ORACLE
- JDEdwards Enterprise Software
- NETSUITE
- servicenow
- LAWSON
- ADP
- workday.
- PeopleSoft.
- sage
- Microsoft Azure
- SAP
- APPTIO

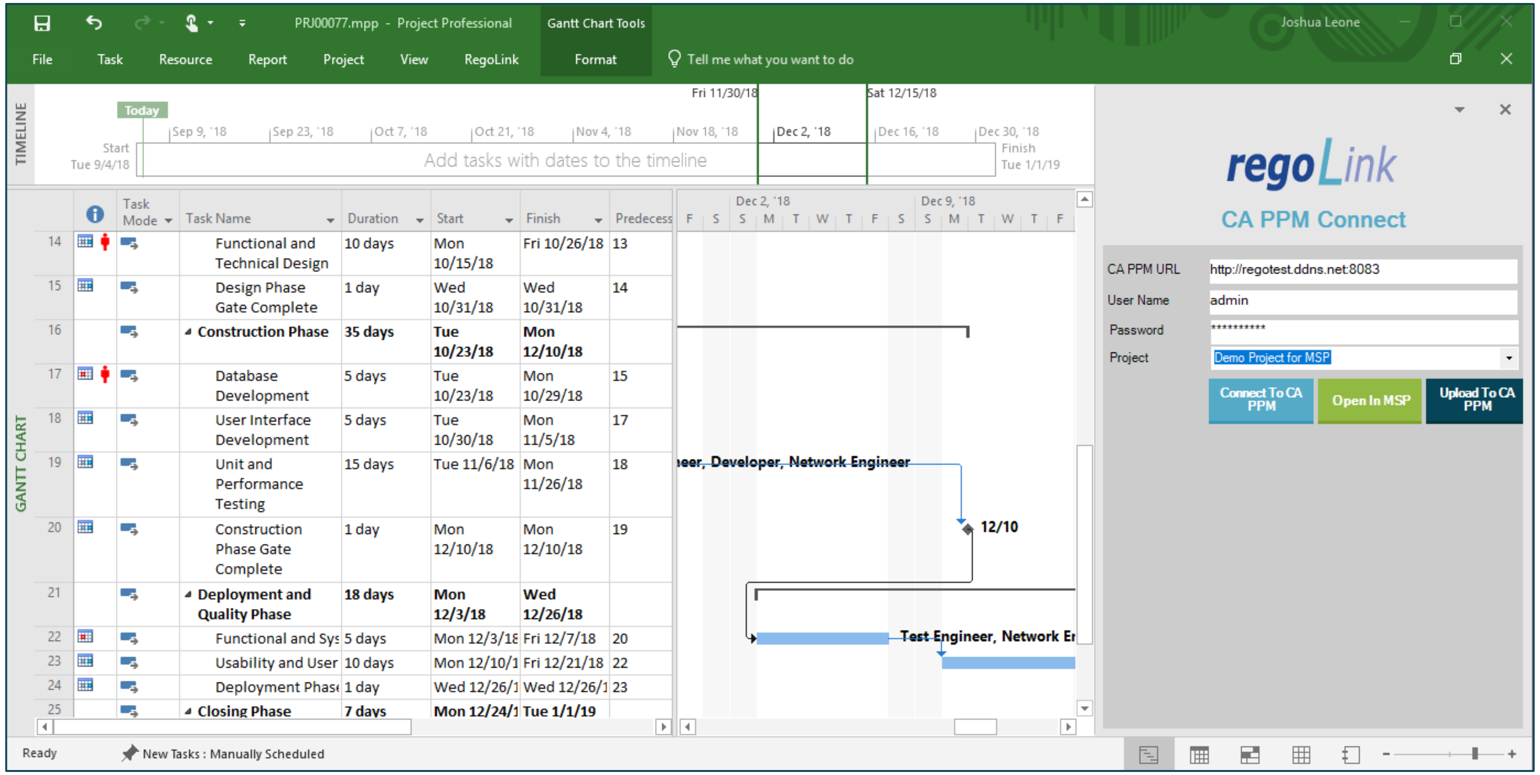
Reporting and Business Intelligence

- Power BI
- JASPERSOFT
- tableau
- Azure Data lake
- Spotfire
- QlikView

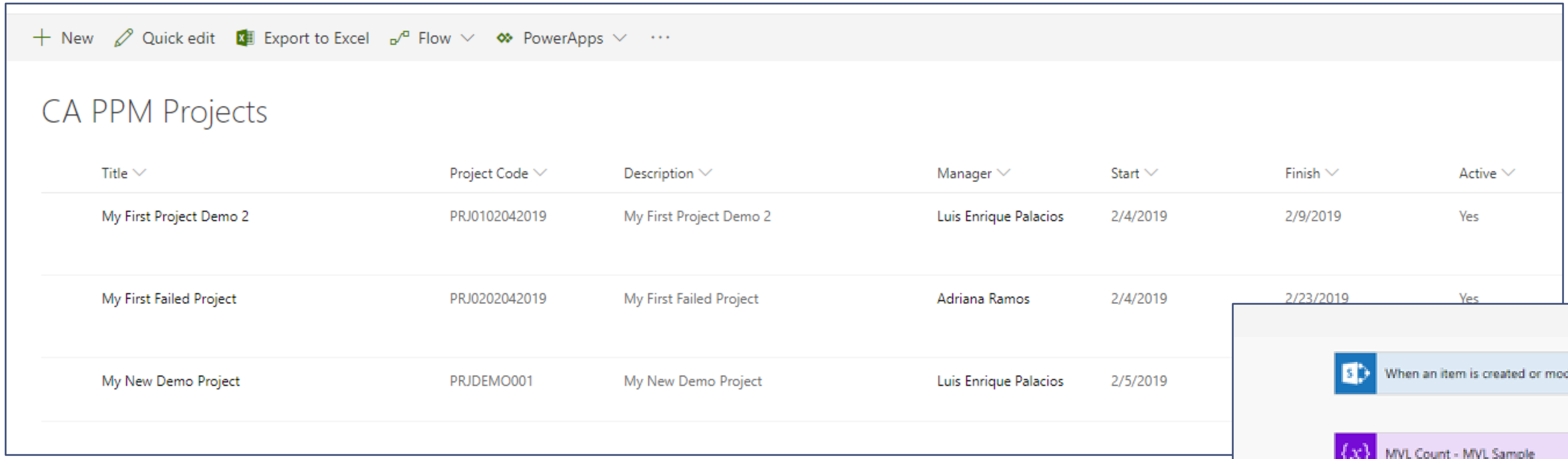
Rego Innovations: O365 / Schedule connectors

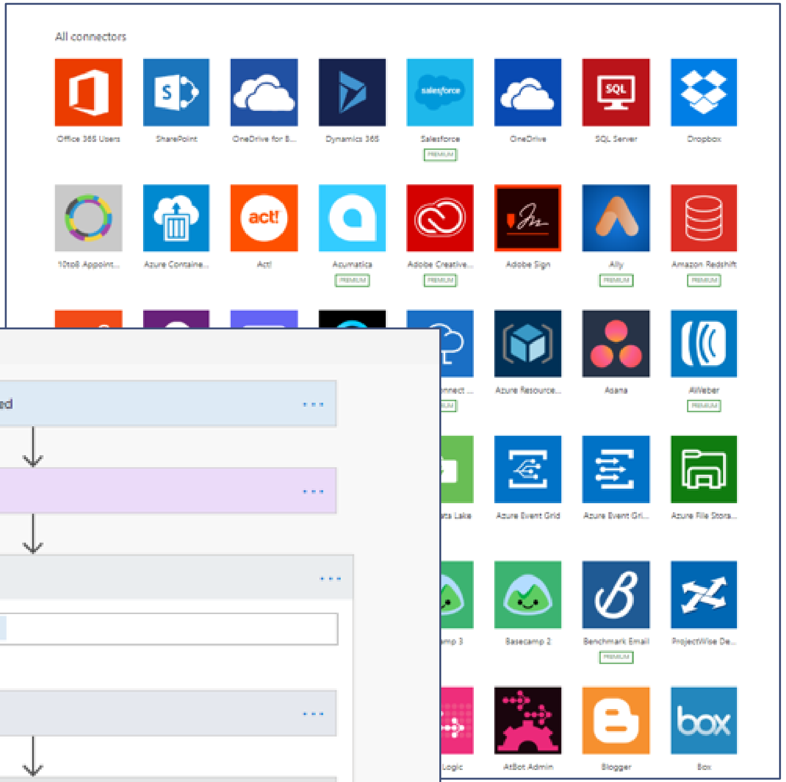
Enhanced Microsoft Project

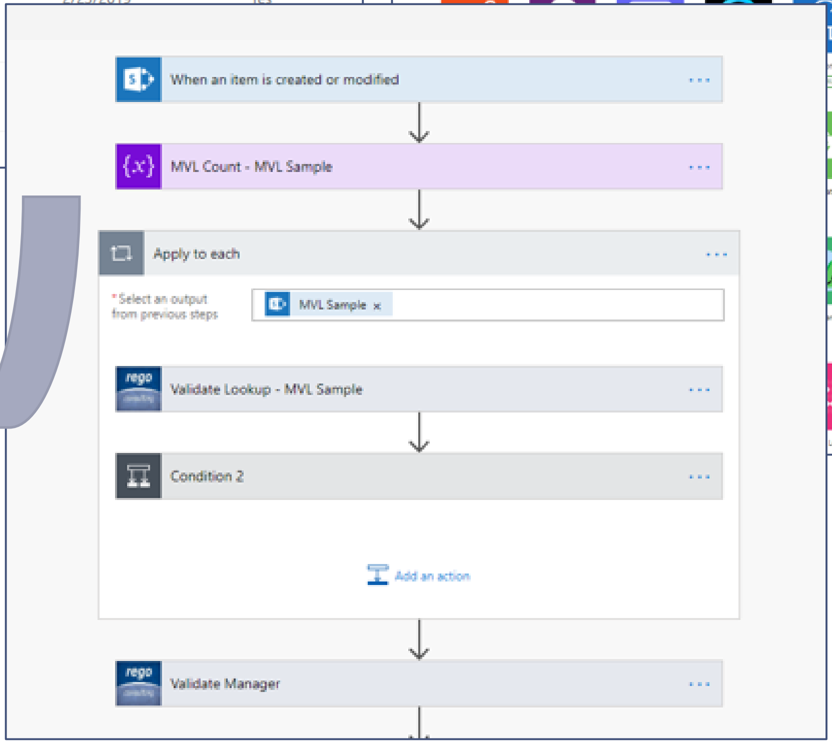
- Written from the ground up
  - Latest .NET technology used on the client side
- Optimized for fast saving
  - Reduce payload size and server side validations – twice the speed
- Enhanced Error Messaging
  - When save – identify exact errors preventing the save
- Custom Field Support on the tasks
  - 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



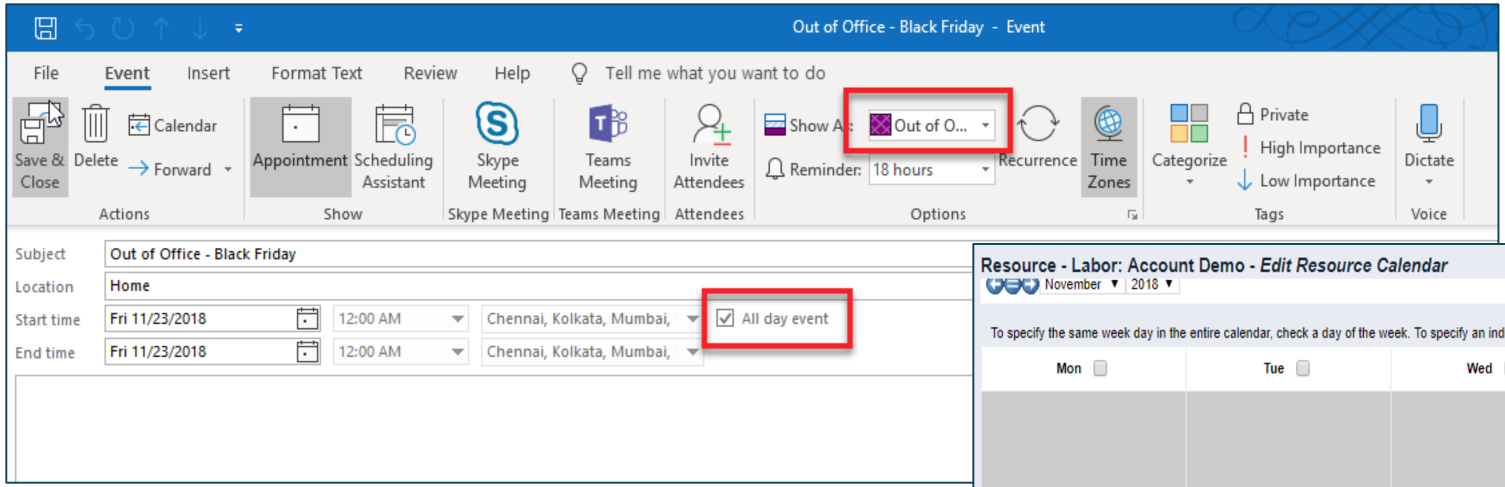


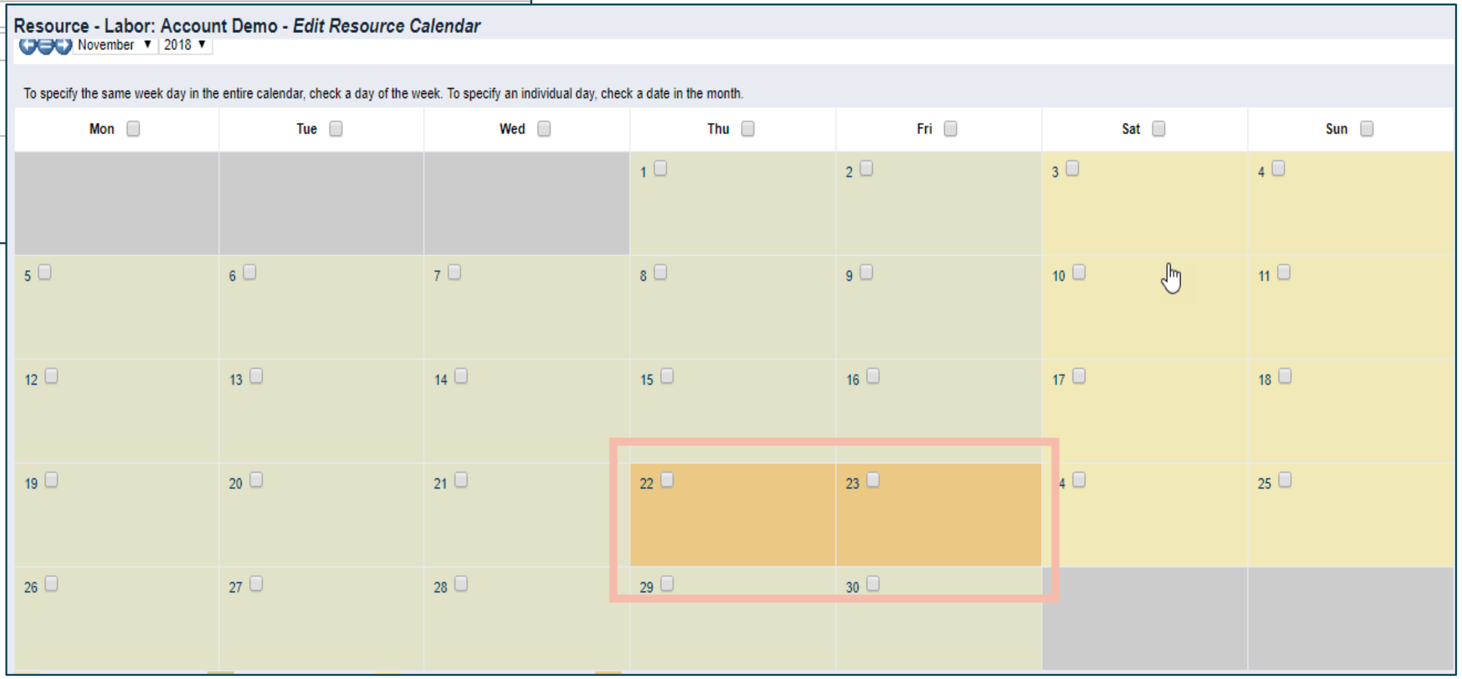


- Universal Clarity connector
  - Full SharePoint integration capabilities
- Utilize the complete MS Flow ecosystem
  - Approval Flows
  - Create MS Teams on the fly
  - Sync up conversations to Slack
  - Import marketing contacts from Hubspot
  - Hundreds more

Microsoft Outlook

- Sync Out Office events with your Clarity calendar

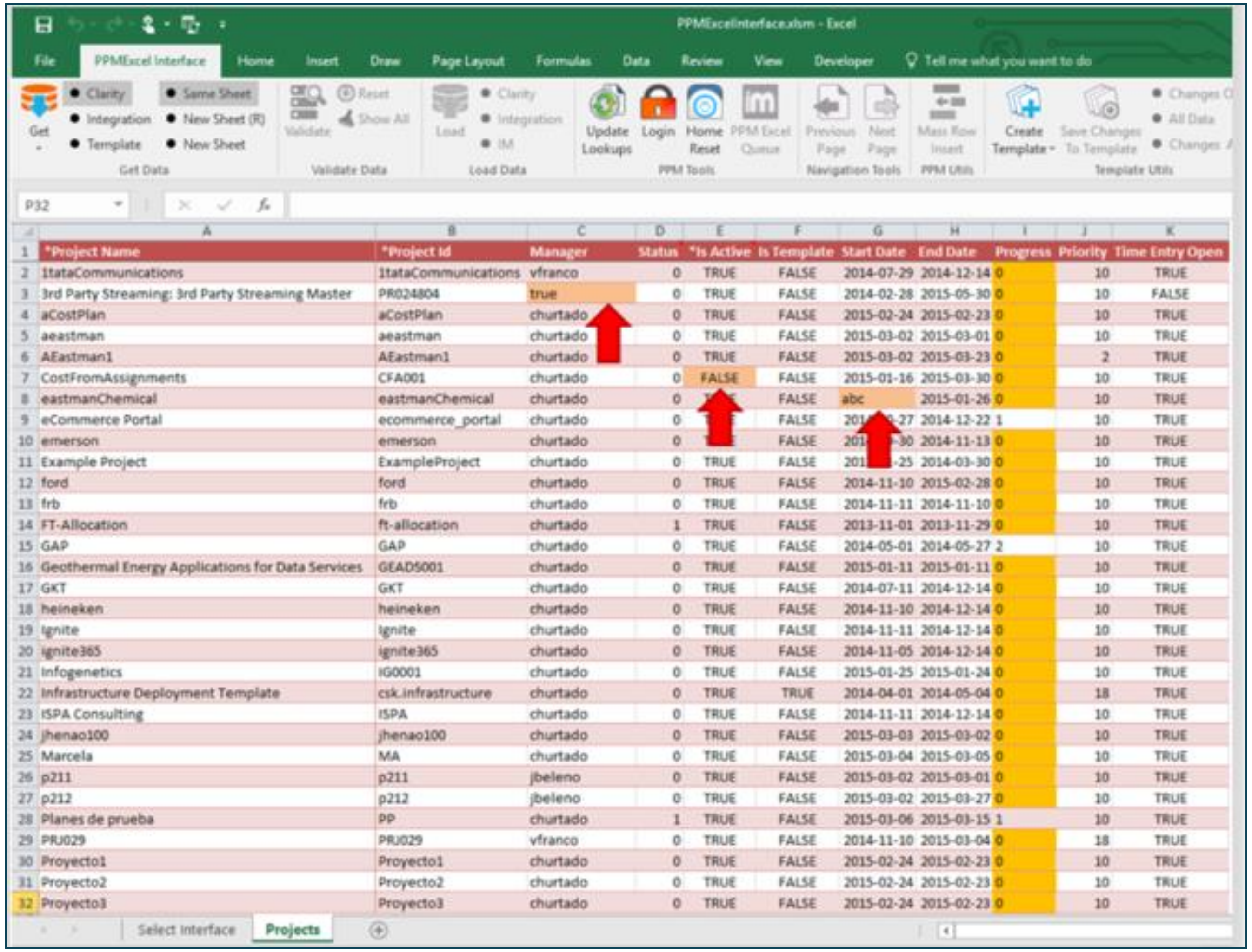




Microsoft Excel

- Attachment based uploaders
  - Cost Plans
  - Allocations

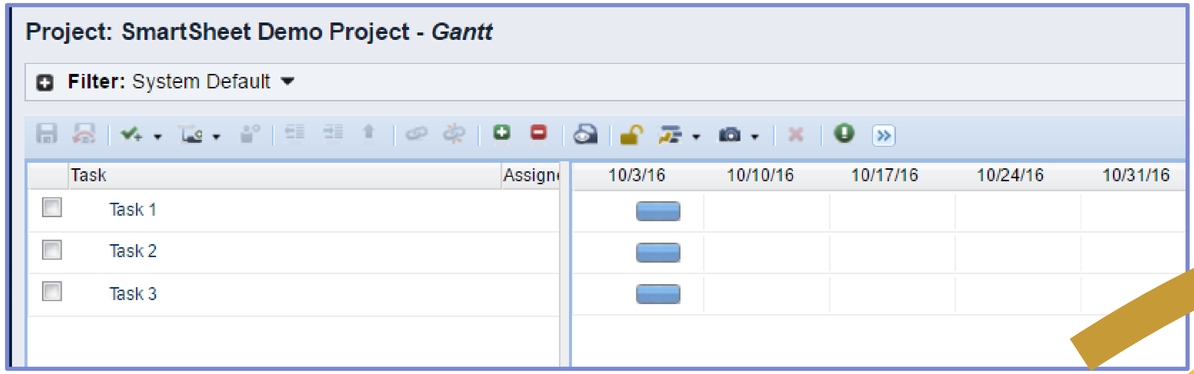
- Excel Data Manager
  - Bulk edit your Clarity data straight from Excel
  - 25 standard data interfaces included

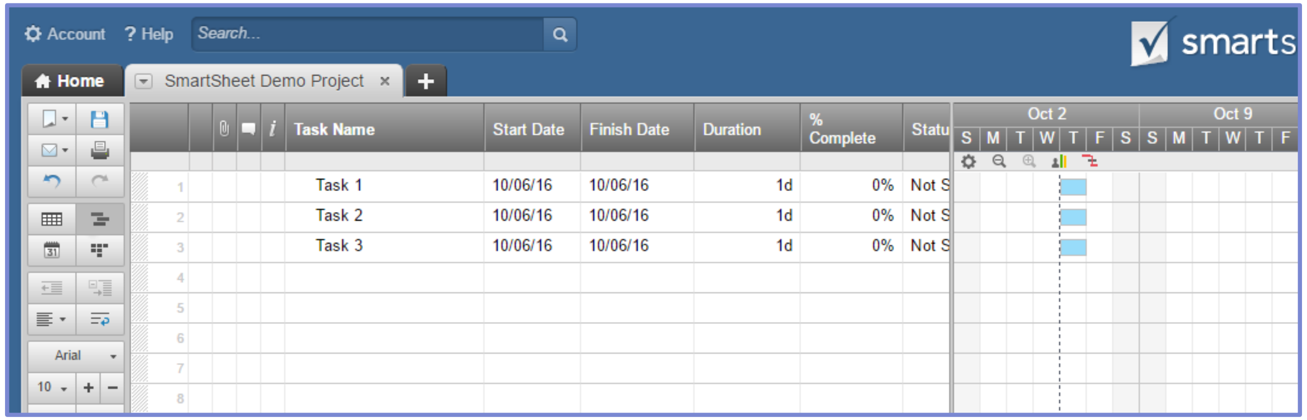


	*Project Name	*Project Id	Manager	Status	*Is Active	Is Template	Start Date	End Date	Progress	Priority	Time Entry Open
2	1tataCommunications	1tataCommunications	vfranco	0	TRUE	FALSE	2014-07-29	2014-12-14	0	10	TRUE
3	3rd Party Streaming: 3rd Party Streaming Master	PR024804	true	0	TRUE	FALSE	2014-02-28	2015-05-30	0	10	FALSE
4	aCostPlan	aCostPlan	churtado	0	TRUE	FALSE	2015-02-24	2015-02-23	0	10	TRUE
5	aeastman	aeastman	churtado	0	TRUE	FALSE	2015-03-02	2015-03-01	0	10	TRUE
6	AEastman1	AEastman1	churtado	0	TRUE	FALSE	2015-03-02	2015-03-23	0	2	TRUE
7	CostFromAssignments	CFA001	churtado	0	FALSE	FALSE	2015-01-16	2015-03-30	0	10	TRUE
8	eastmanChemical	eastmanChemical	churtado	0	[illegible]	FALSE	abc	2015-01-26	0	10	TRUE
9	eCommerce Portal	ecommerce_portal	churtado	0	[illegible]	FALSE	[illegible]	2014-12-22	1	10	TRUE
10	emerson	emerson	churtado	0	[illegible]	FALSE	[illegible]	2014-11-13	0	10	TRUE
11	Example Project	ExampleProject	churtado	0	TRUE	FALSE	[illegible]	2014-03-30	0	10	TRUE
12	ford	ford	churtado	0	TRUE	FALSE	2014-11-10	2015-02-28	0	10	TRUE
13	frb	frb	churtado	0	TRUE	FALSE	2014-11-11	2014-11-10	0	10	TRUE
14	FT-Allocation	ft-allocation	churtado	1	TRUE	FALSE	2013-11-01	2013-11-29	0	10	TRUE
15	GAP	GAP	churtado	0	TRUE	FALSE	2014-05-01	2014-05-27	2	10	TRUE
16	Geothermal Energy Applications for Data Services	GEADS001	churtado	0	TRUE	FALSE	2015-01-11	2015-01-11	0	10	TRUE
17	GKT	GKT	churtado	0	TRUE	FALSE	2014-07-11	2014-12-14	0	10	TRUE
18	heineken	heineken	churtado	0	TRUE	FALSE	2014-11-10	2014-12-14	0	10	TRUE
19	Ignite	Ignite	churtado	0	TRUE	FALSE	2014-11-11	2014-12-14	0	10	TRUE
20	ignite365	ignite365	churtado	0	TRUE	FALSE	2014-11-05	2014-12-14	0	10	TRUE
21	Infogenetics	IG0001	churtado	0	TRUE	FALSE	2015-01-25	2015-01-24	0	10	TRUE
22	Infrastructure Deployment Template	csk.infrastructure	churtado	0	TRUE	TRUE	2014-04-01	2014-05-04	0	18	TRUE
23	ISPA Consulting	ISPA	churtado	0	TRUE	FALSE	2014-11-11	2014-12-14	0	10	TRUE
24	jhenao100	jhenao100	churtado	0	TRUE	FALSE	2015-03-03	2015-03-02	0	10	TRUE
25	Marcela	MA	churtado	0	TRUE	FALSE	2015-03-04	2015-03-05	0	10	TRUE
26	p211	p211	jbeleno	0	TRUE	FALSE	2015-03-02	2015-03-01	0	10	TRUE
27	p212	p212	jbeleno	0	TRUE	FALSE	2015-03-02	2015-03-27	0	10	TRUE
28	Planes de prueba	PP	churtado	1	TRUE	FALSE	2015-03-06	2015-03-15	1	10	TRUE
29	PRJ029	PRJ029	vfranco	0	TRUE	FALSE	2014-11-10	2015-03-04	0	18	TRUE
30	Proyecto1	Proyecto1	churtado	0	TRUE	FALSE	2015-02-24	2015-02-23	0	10	TRUE
31	Proyecto2	Proyecto2	churtado	0	TRUE	FALSE	2015-02-24	2015-02-23	0	10	TRUE
32	Proyecto3	Proyecto3	churtado	0	TRUE	FALSE	2015-02-24	2015-02-23	0	10	TRUE

Smartsheet

- 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

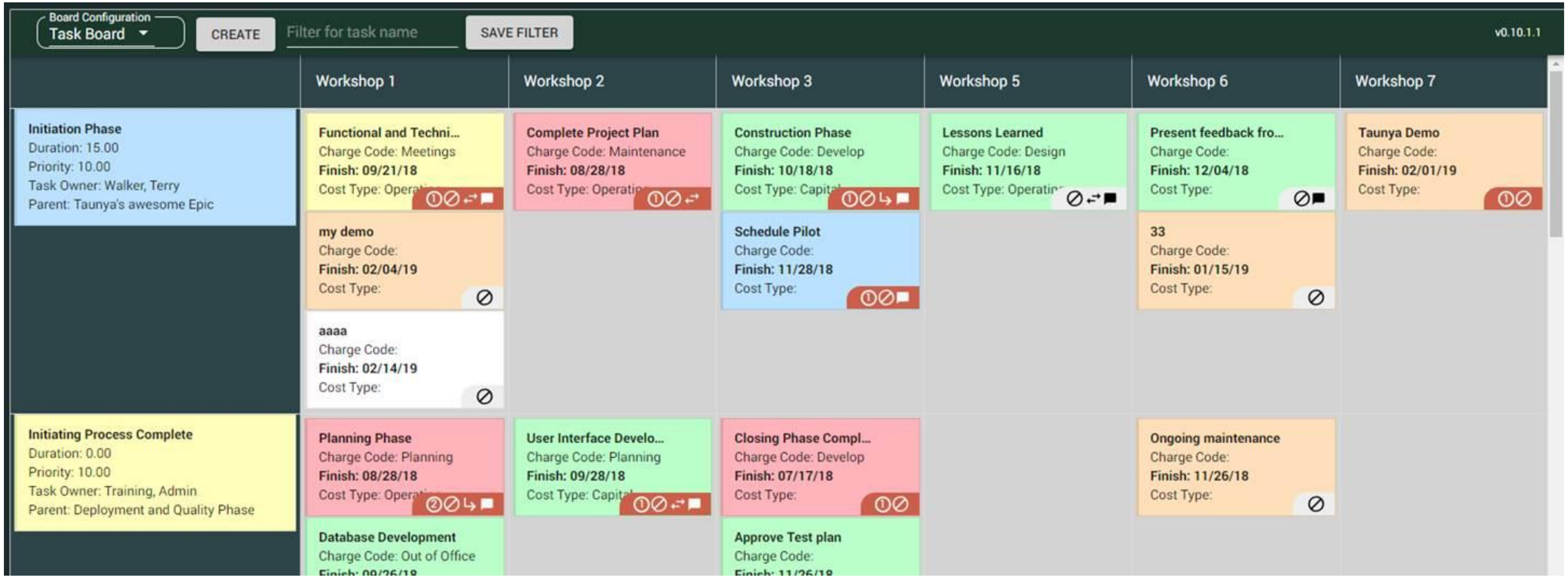




Rego Innovations: Usability and Efficiency tools

Wagile Board

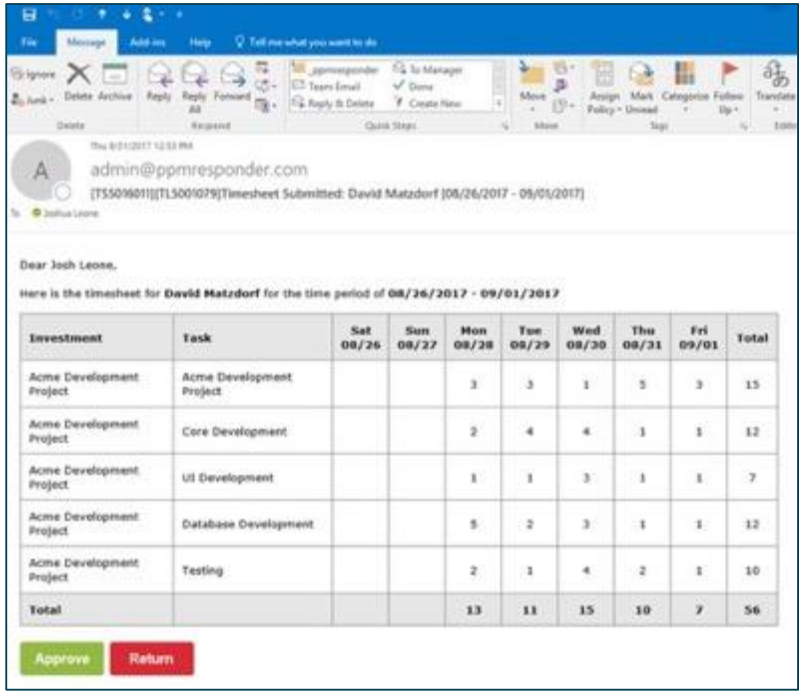
- Multi-dimensional Kanban-like experience of task management
- Conversations on tasks
- Blockers
- Dependencies
- Sub-tasks



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



admin@ppmresponder.com

[TS5016011][TL5001079]Timesheet Submitted: David Matzdorf [08/26/2017 - 09/01/2017]

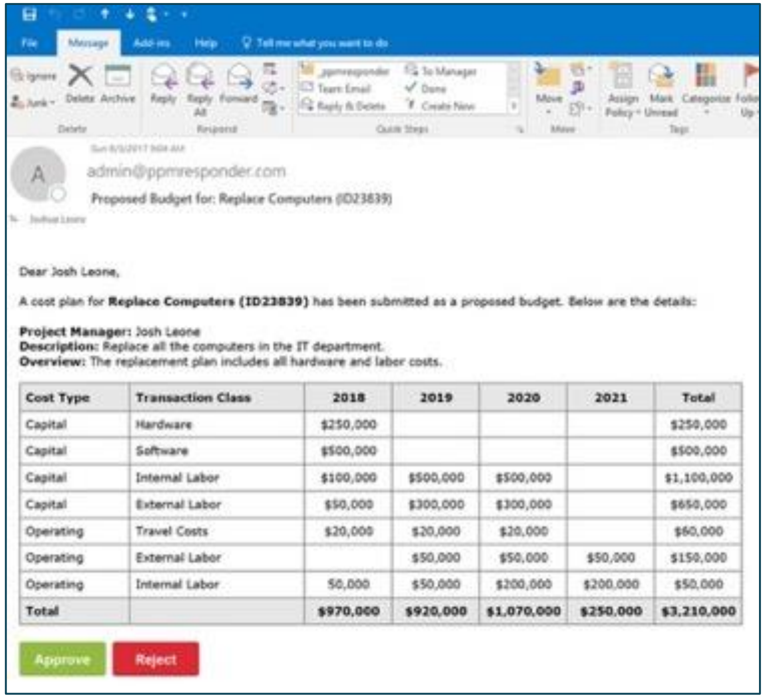
Dear Josh Leone,

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
Total				**13**	**11**	**15**	**10**	**7**	**56**

Approve Return

Example Budget Submission



admin@ppmresponder.com

Proposed Budget for: Replace Computers (ID23839)

Dear Josh Leone,

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

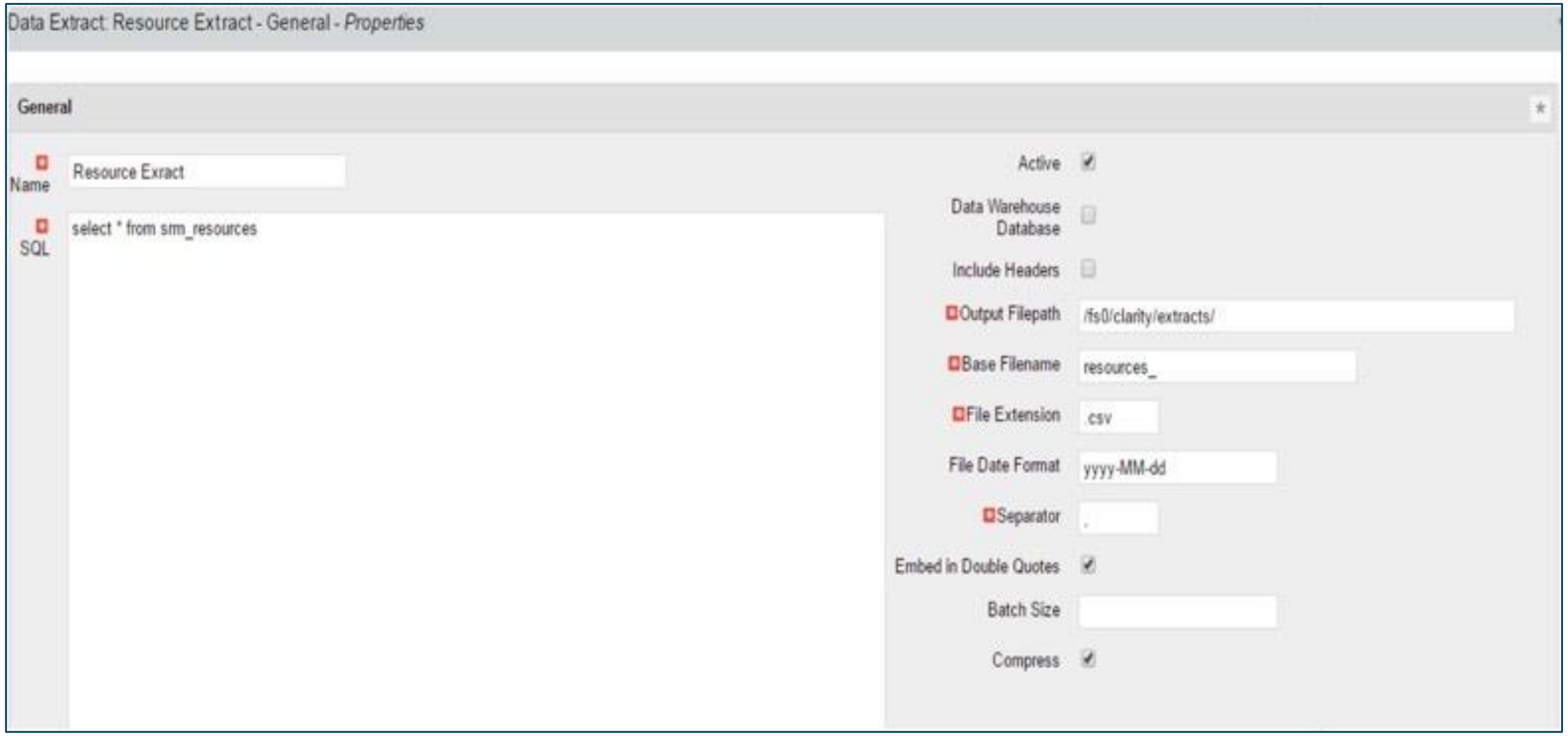
Project Manager: Josh Leone
Description: Replace all the computers in the IT department.
Overview: The replacement plan includes all hardware and labor costs.

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	50,000	$50,000	$200,000	$200,000	$50,000
Total		**$970,000**	**$920,000**	**$1,070,000**	**$250,000**	**$3,210,000**

Approve Reject

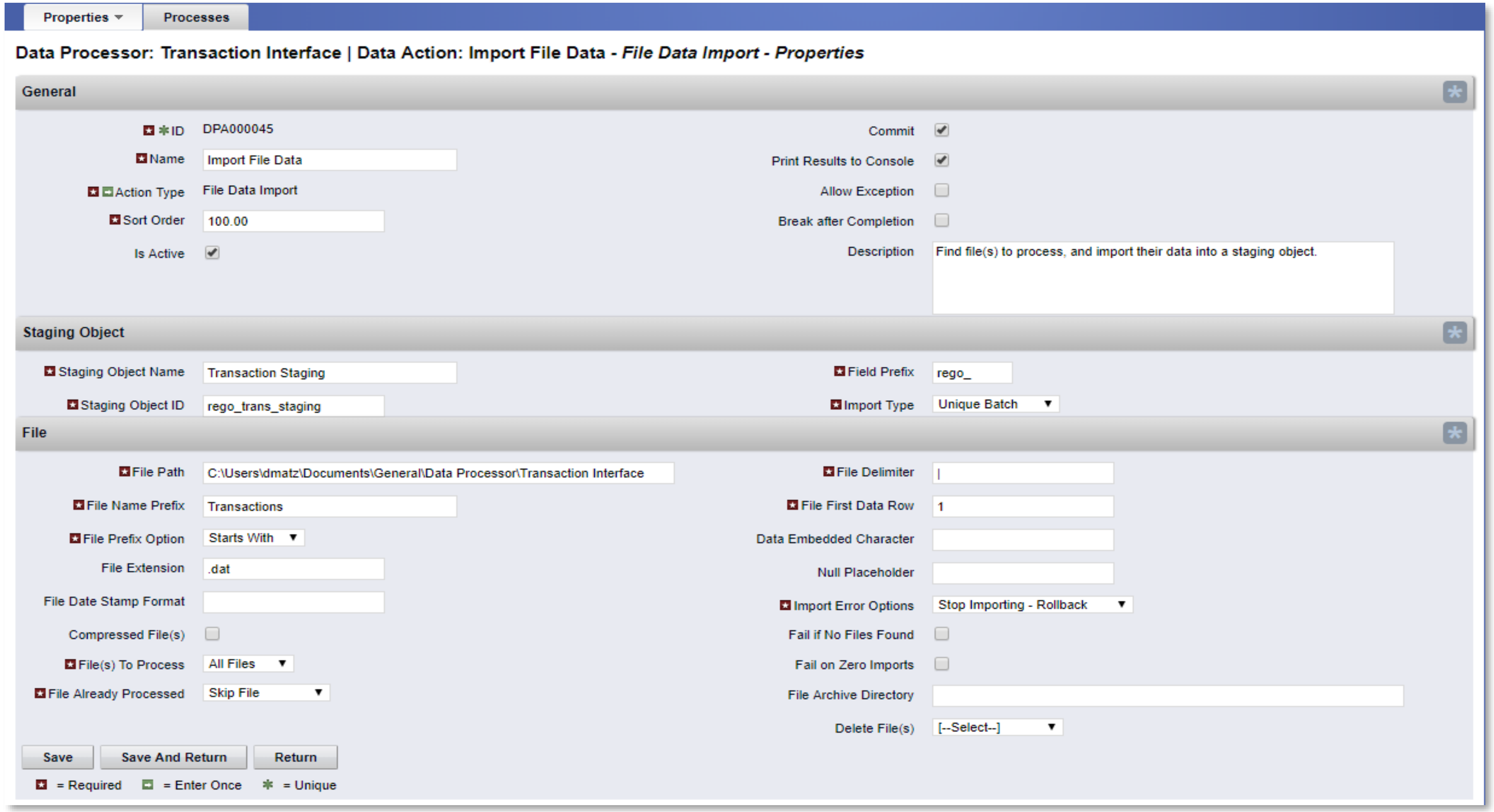
SQL Data Extractor

- Extract data using SQL language
- Create and schedule multiple extractions depending on business need
  - Files can 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



Data Importer

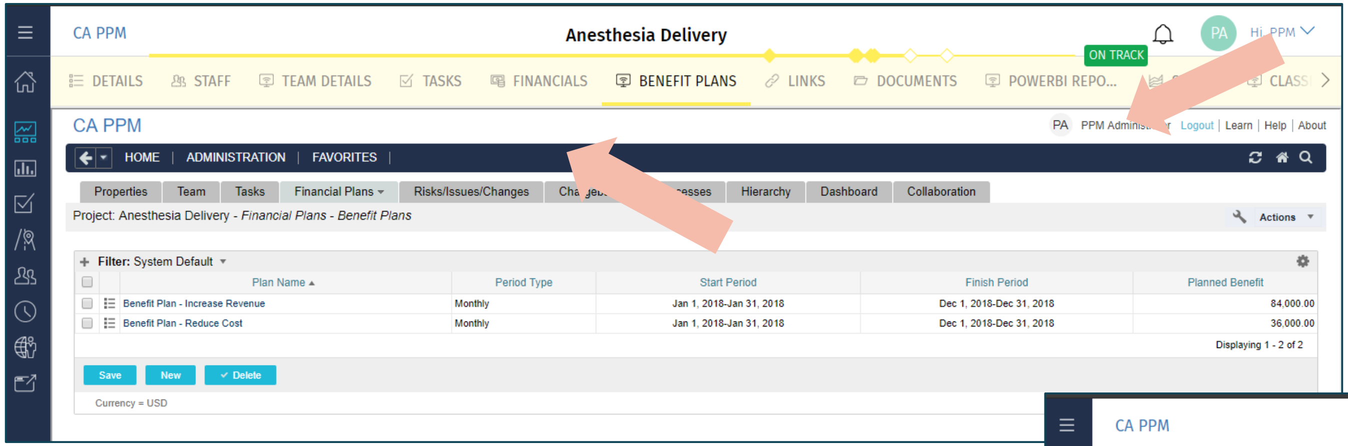
- Universal Importer
  - CSV, Excel, REST
- Used of 90% of all incoming Rego built interfaces
- Purely configuration based
- Flexible options
  - Chain workflows
  - Portal support
  - Robust data validations
  - File batch support
  - Files can be zipped
  - File encryption support



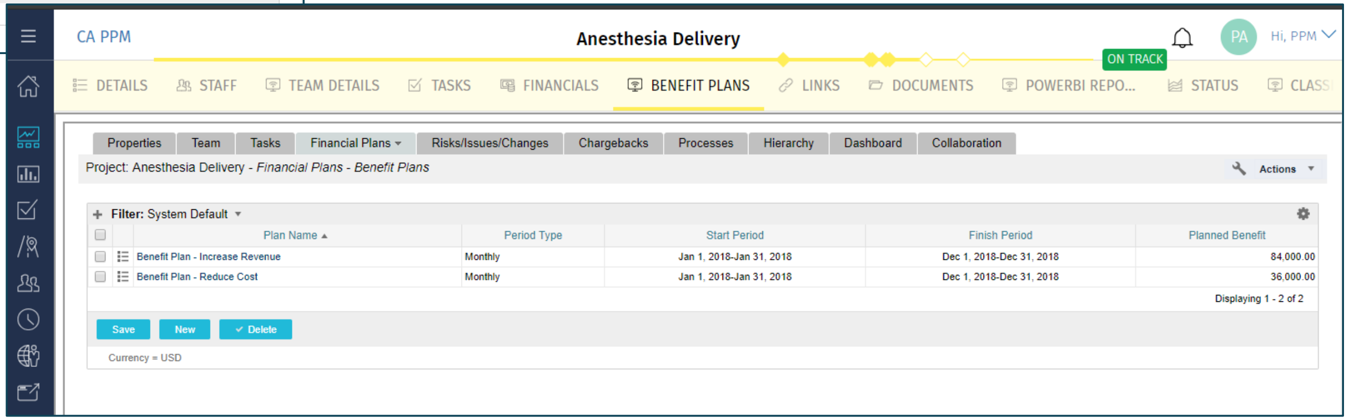
Channel Pack

- 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

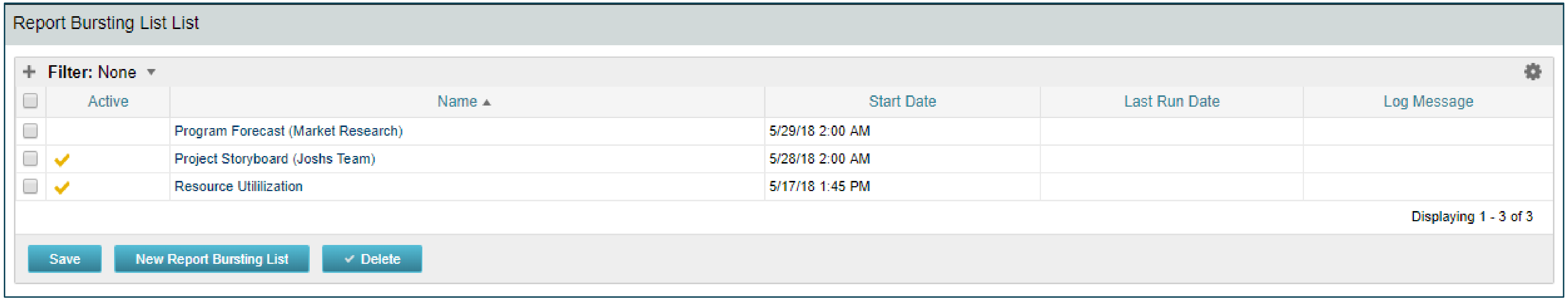


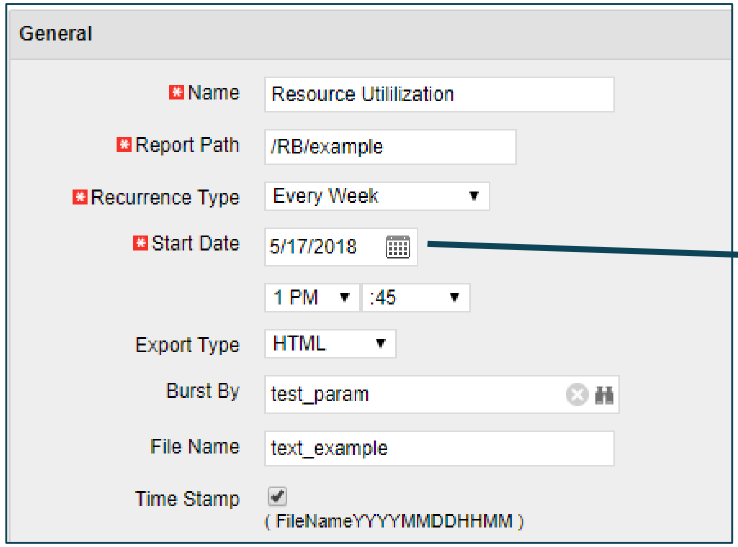
Optimized screen experience

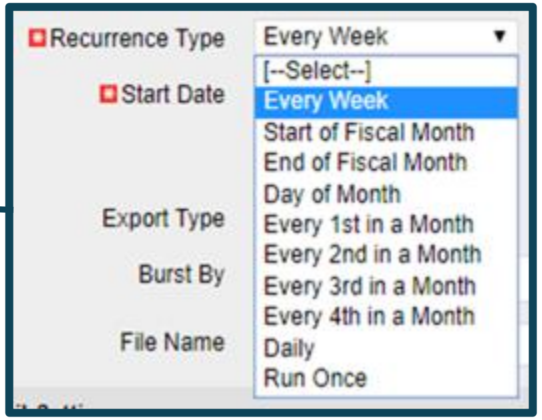
Rego Innovations: Reporting and Business Intelligence

Jasper Report Bursting

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

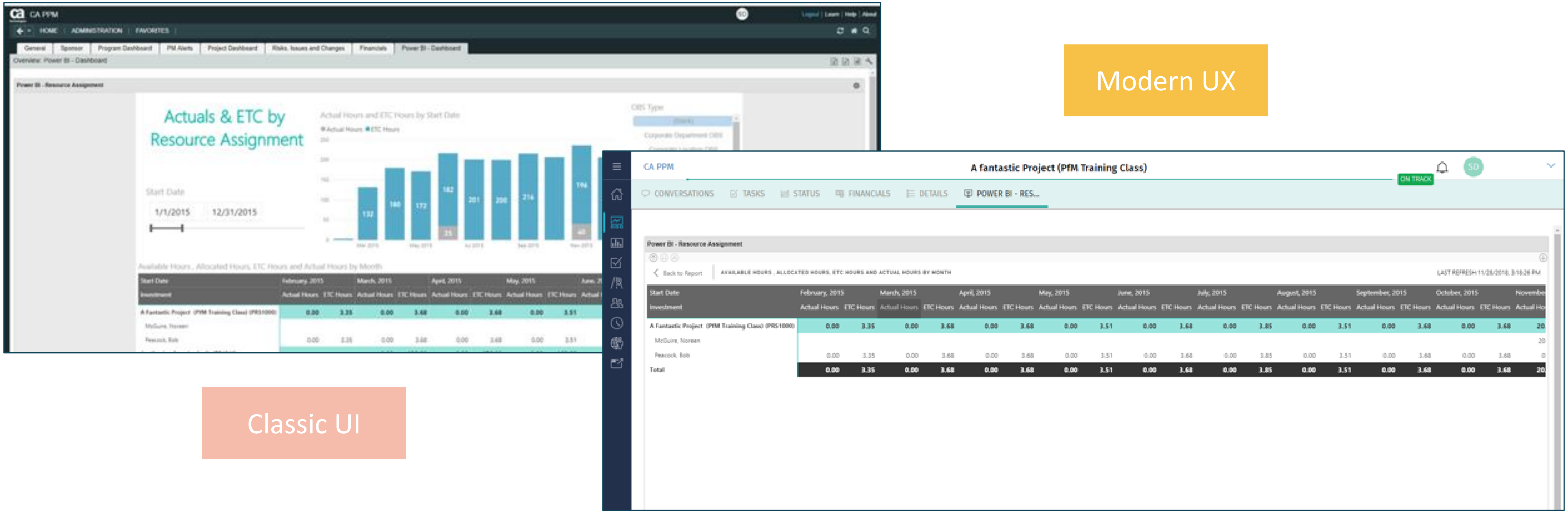






Embedded Power BI

- 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.



Modern UX

Classic UI

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

Intro
- Kick-off
- Workshop purpose/agenda review
- How we'll do this
- Critical success criteria

Review Objectives/Stories
- Review submitted user stories (if applicable)

Mapping
- Project level
- Task level
- Attributes

Financials
- How do we calculate costs
- How do we differentiate capital/operating costs if needed

Resources
- How might resources/staffing be handled

Content

Time tracking
- Are there any deviations needed to the standard connector time-tracking approach

Reporting
- What metrics are needed
- What views/reports are needed

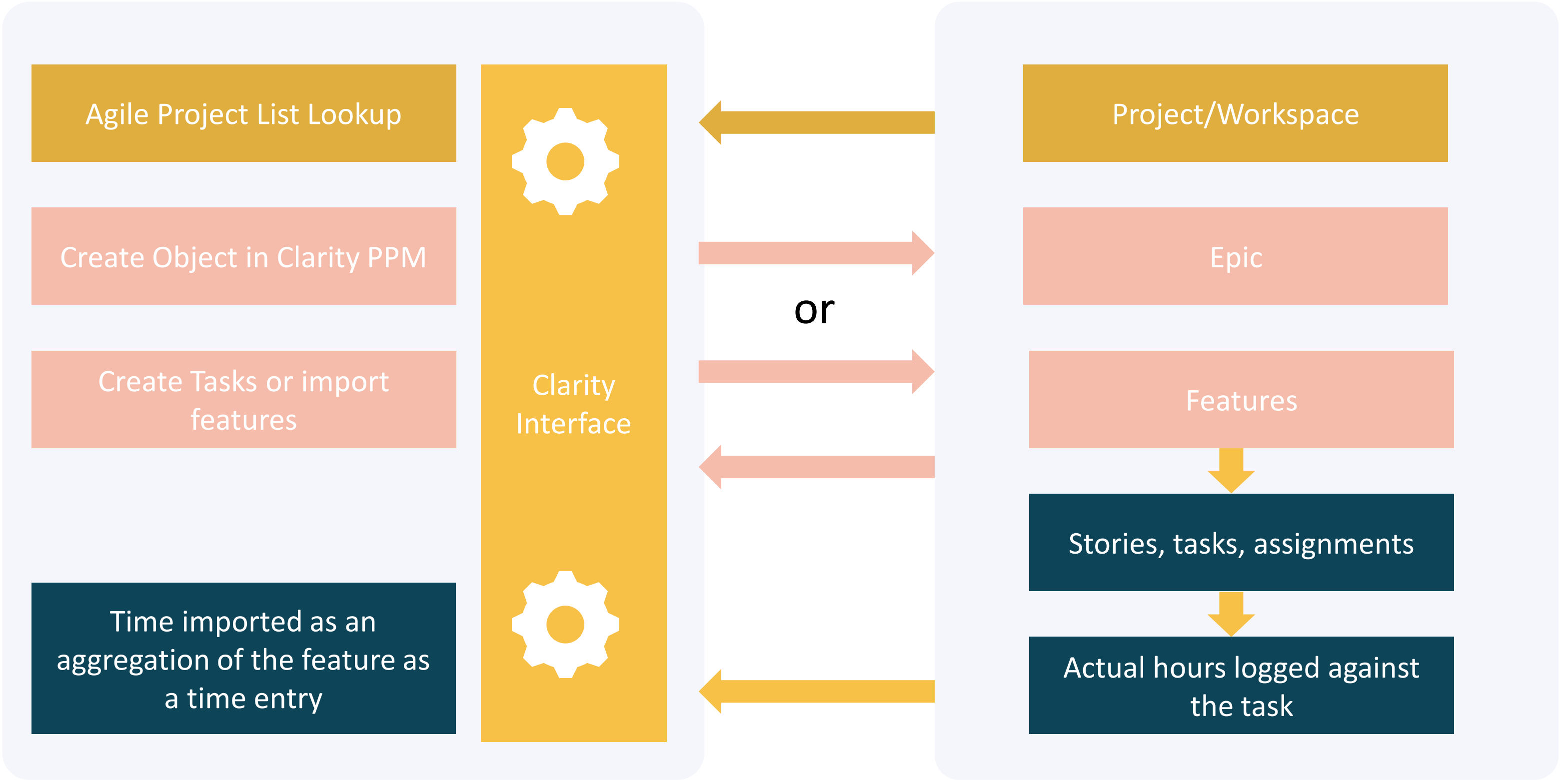
Exception processes
- How do we handle exceptions (i.e. story moves from one project to another, etc.)
- What is an error vs a warning

Data migration approach
- To go-live, how will we establish all of the connections for existing projects

Conclusion
- Review open items/parking lot
- Review captured stories
- Discuss next steps

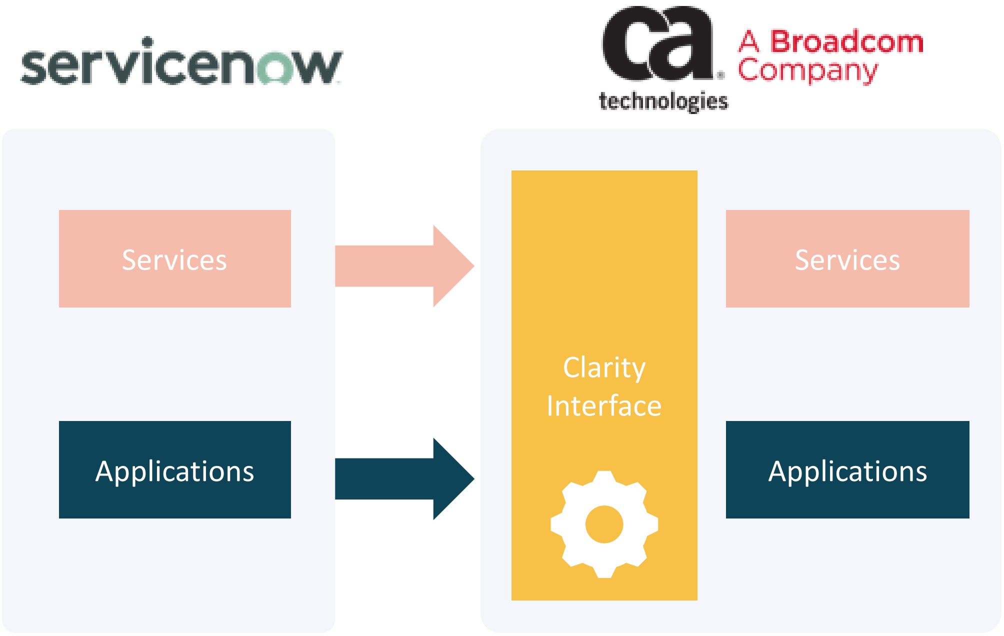
ca technologies A Broadcom Company

JIRA Visual Studio RALLY VERSIONONE

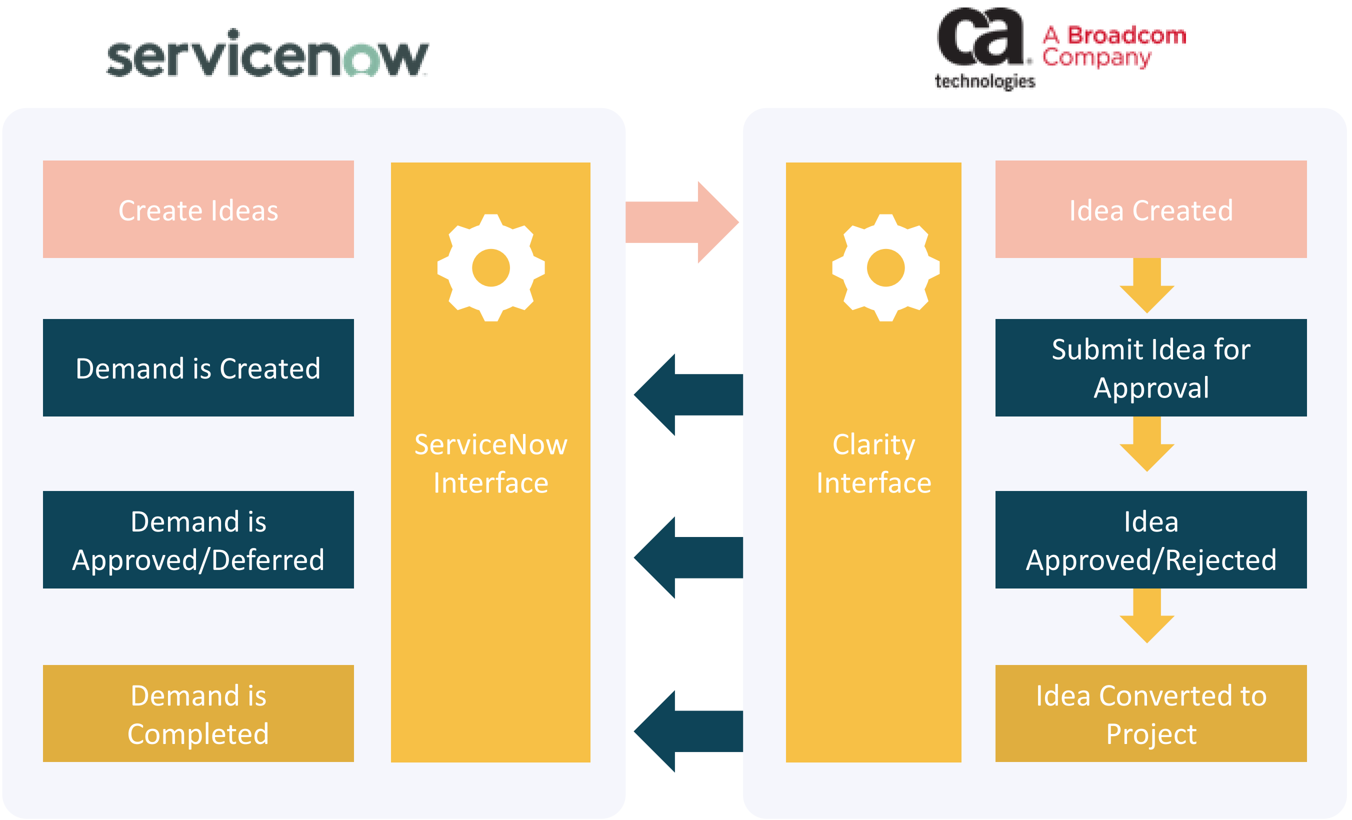


ServiceNow now

Services and Applications

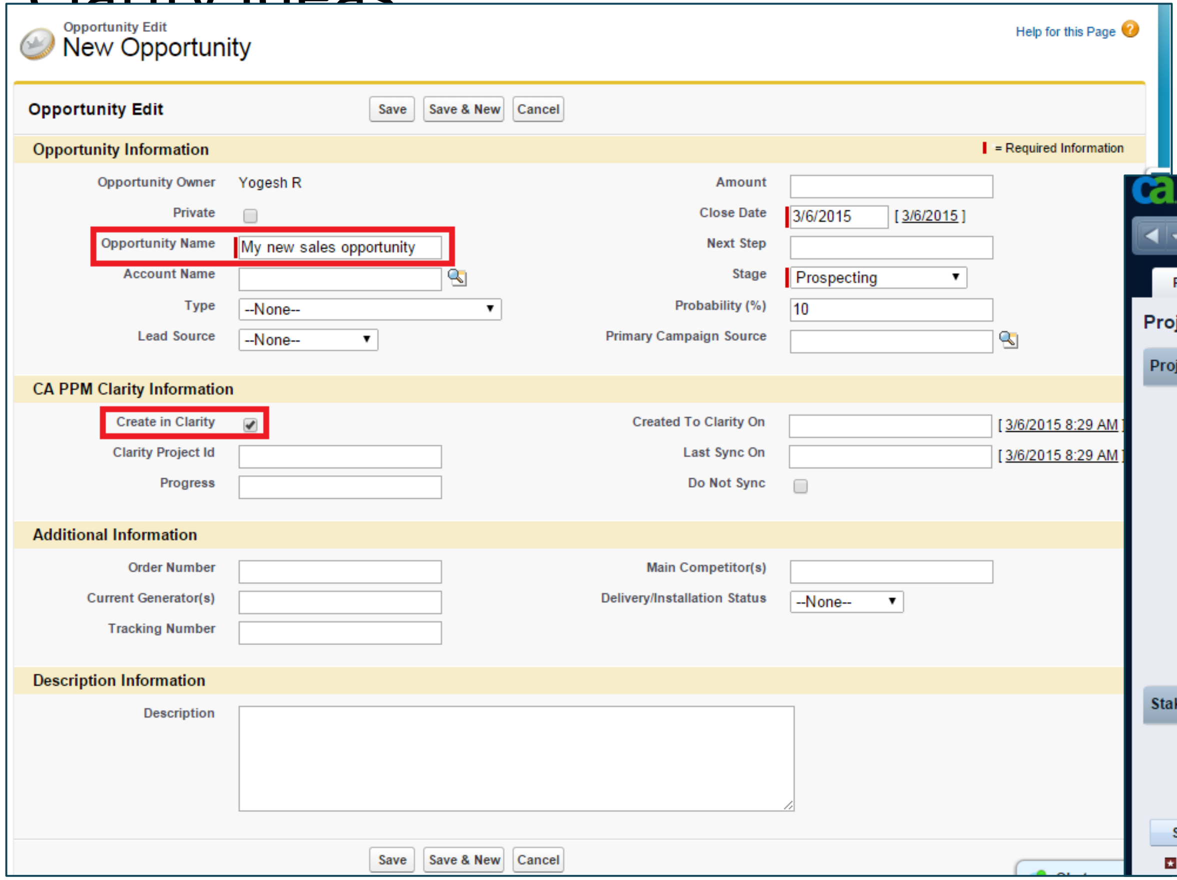


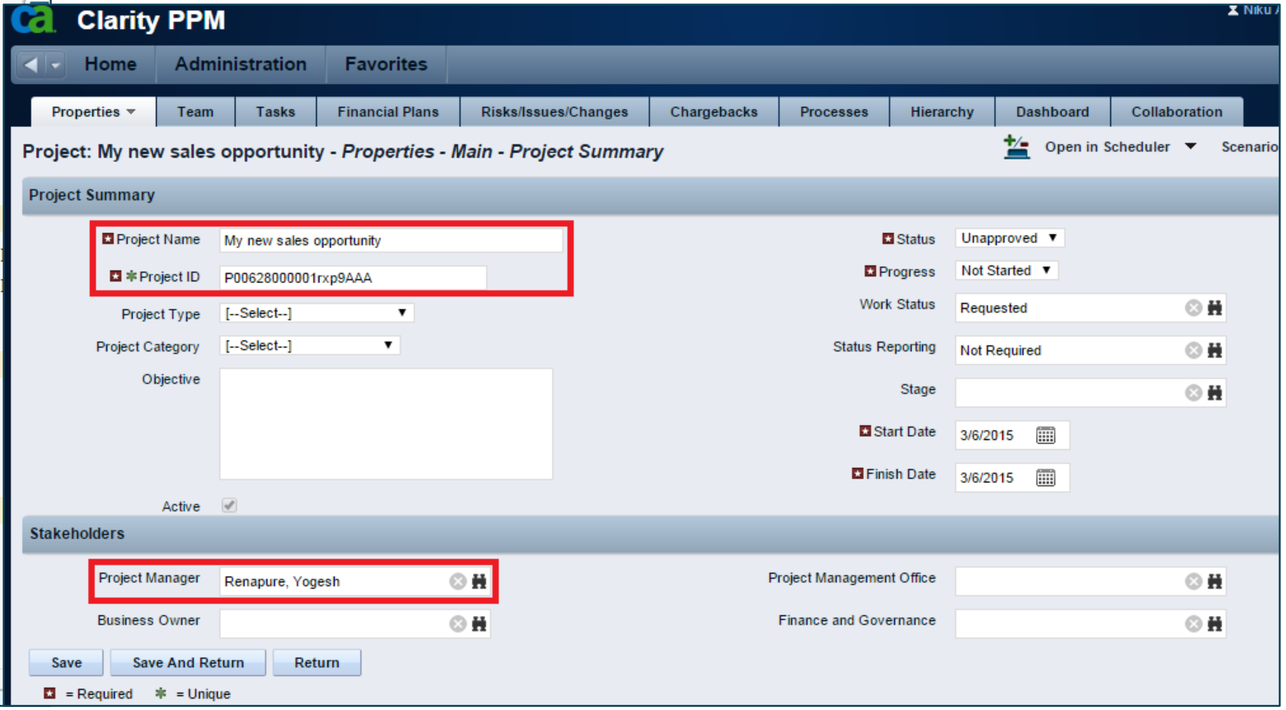
Idea/Demand Integration



Salesforce

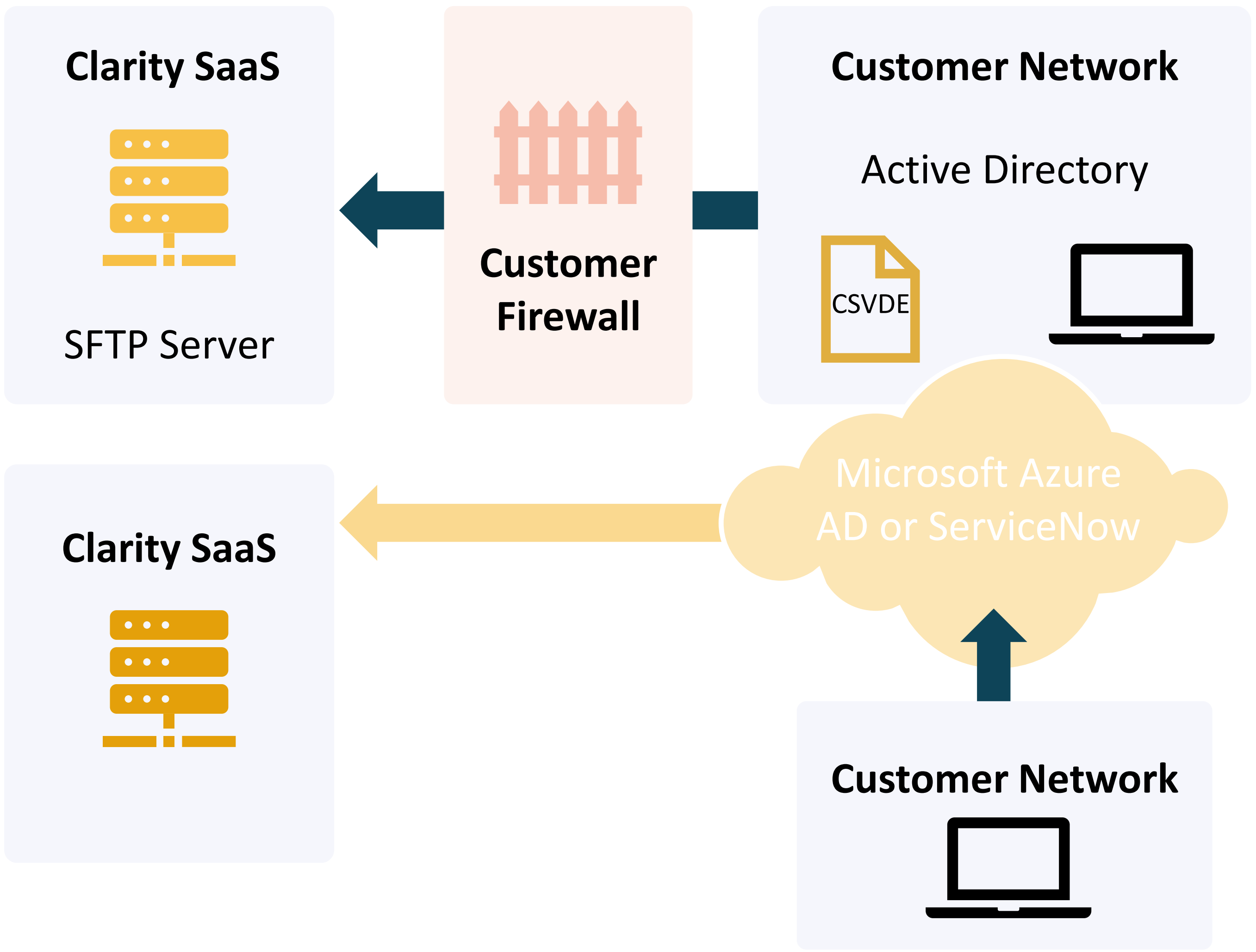
Sync Salesforce opportunities to Clarity Ideas





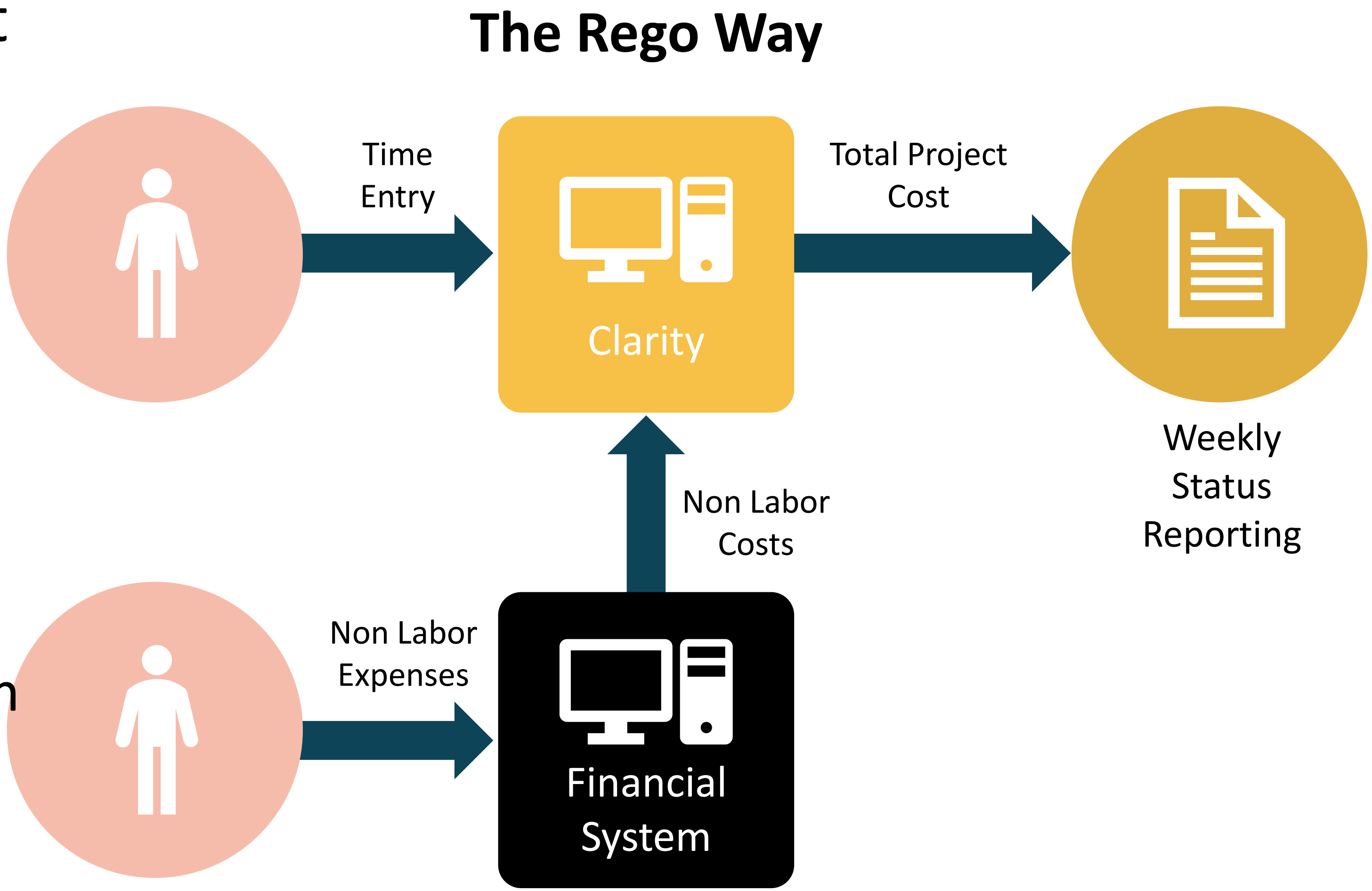
Clarity HR/Resource Interface

- 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



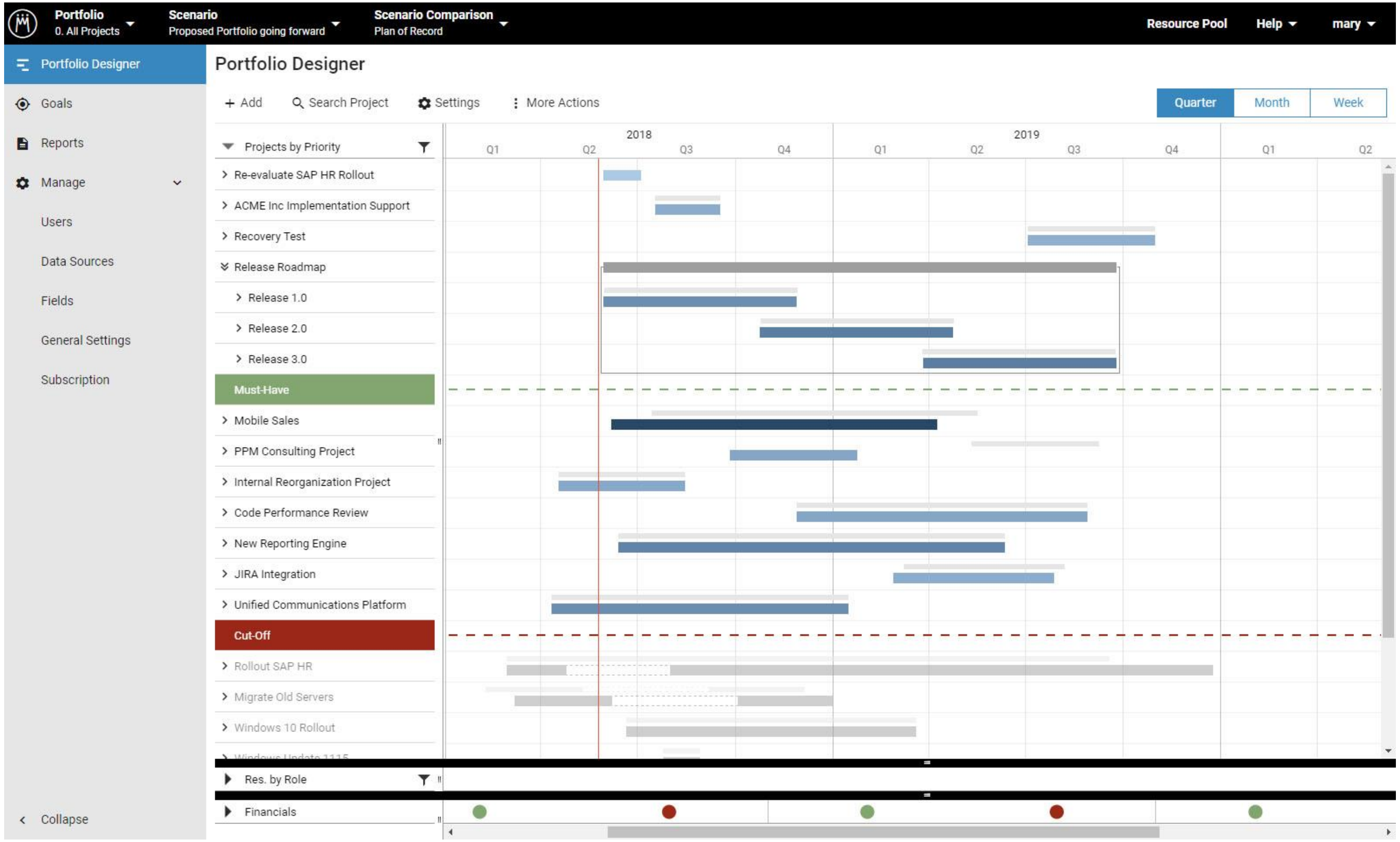
Financials Interface

- 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



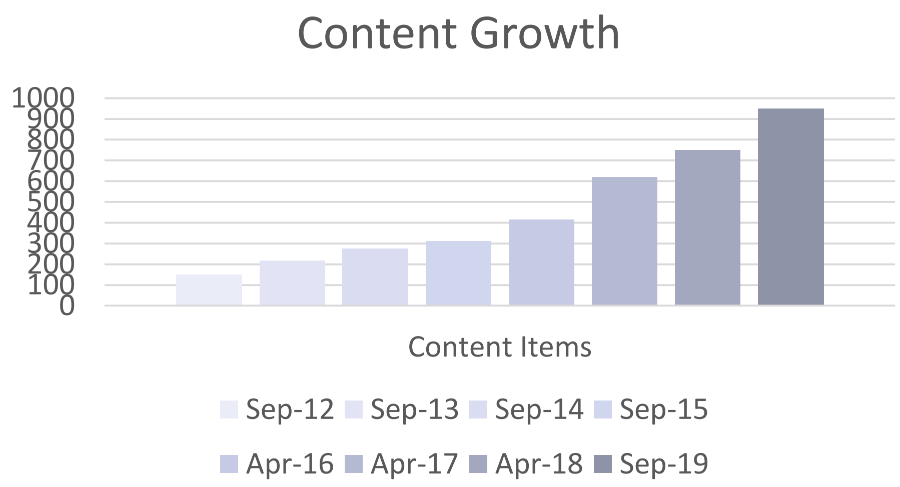
RegoXchange

RegoXchange - Reuse of Existing Solutions

- 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

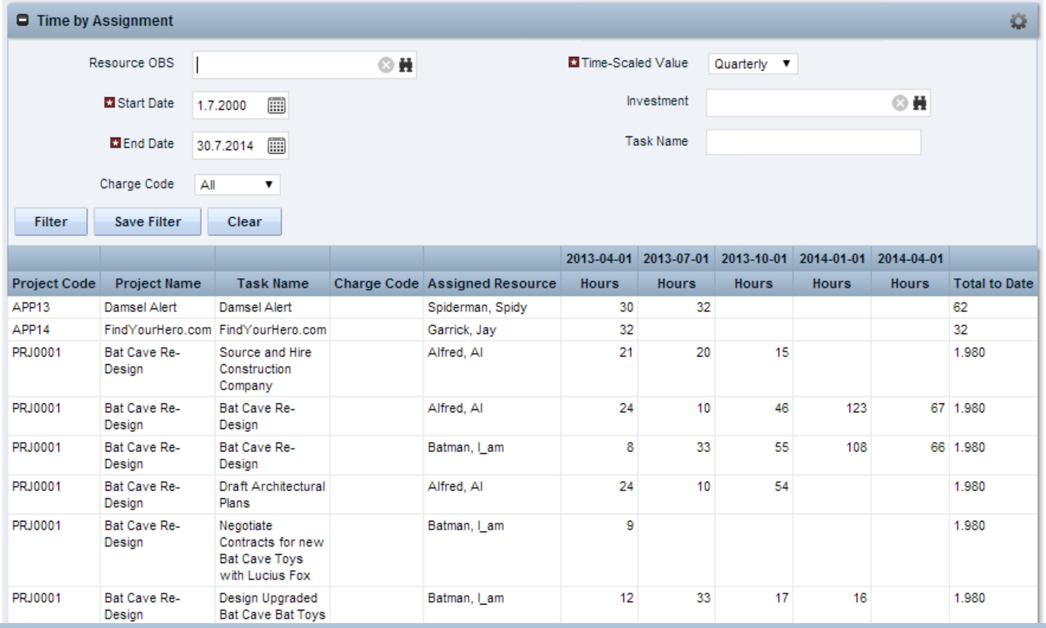
- Let's quickly review the easiest ways to find content on the site

Content Highlights

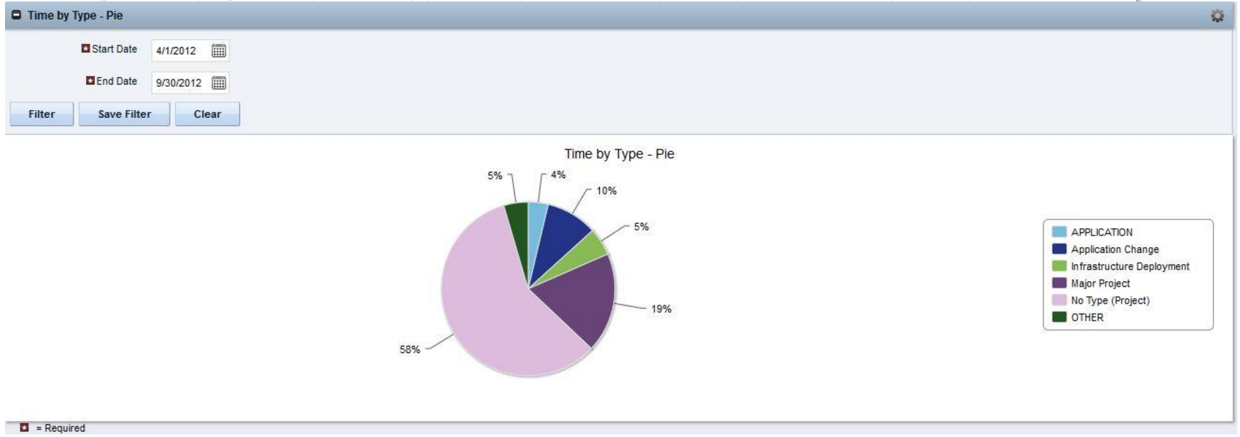
Portlets: Examples 2 of 200+

Portlets: Time by…

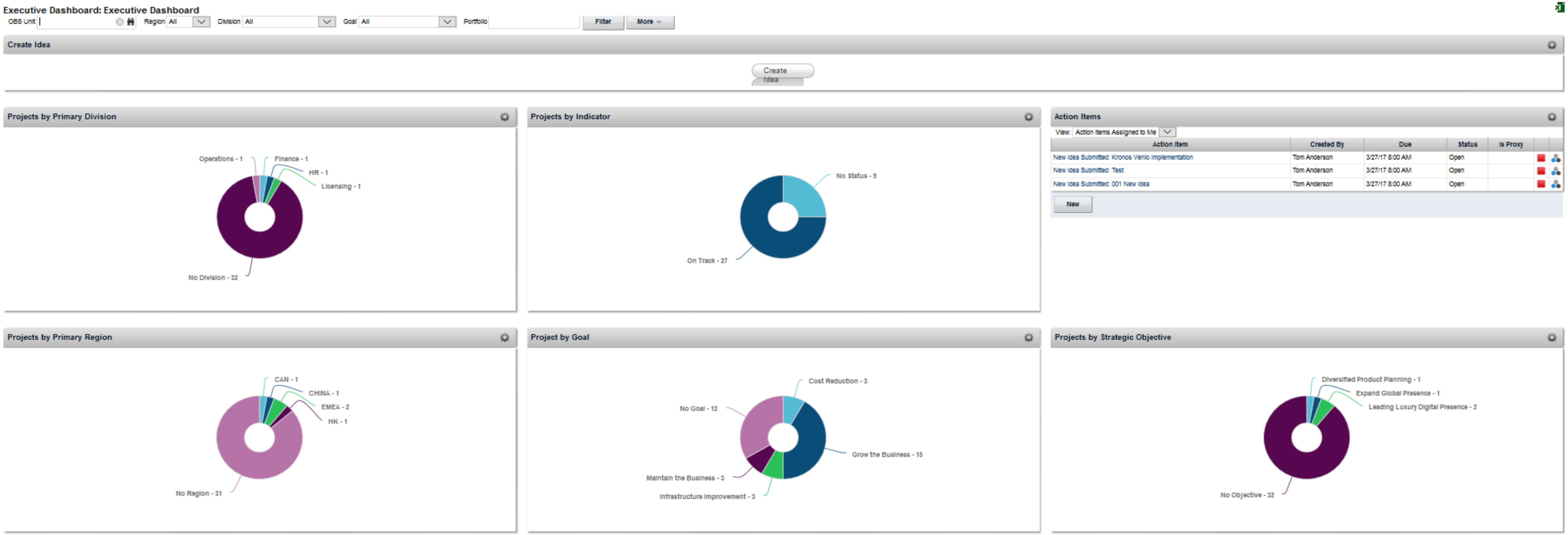
- Time by Assignment
- Time by Investment
- Time by Resource
- Time by Resource and Investment
- Time by Stage and Timescale
- Time by Task
- Time by Task Stage
- Time by Type – Pie Chart



Project Code	Project Name	Task Name	Charge Code	Assigned Resource	2013-04-01 Hours	2013-07-01 Hours	2013-10-01 Hours	2014-01-01 Hours	2014-04-01 Hours	Total to Date
APP13	Damsel Alert	Damsel Alert		Spiderman, Spidy	30	32				62
APP14	FindYourHero.com	FindYourHero.com		Garrick, Jay	32					32
PRJ0001	Bat Cave Re-Design	Source and Hire Construction Company		Alfred, Al	21	20	15			1.980
PRJ0001	Bat Cave Re-Design	Bat Cave Re-Design		Alfred, Al	24	10	46	123	67	1.980
PRJ0001	Bat Cave Re-Design	Bat Cave Re-Design		Batman, I_am	8	33	55	108	66	1.980
PRJ0001	Bat Cave Re-Design	Draft Architectural Plans		Alfred, Al	24	10	54			1.980
PRJ0001	Bat Cave Re-Design	Negotiate Contracts for new Bat Cave Toys with Lucius Fox		Batman, I_am	9					1.980
PRJ0001	Bat Cave Re-Design	Design Upgraded Bat Cave Bat Toys		Batman, I_am	12	33	17	16		1.980



Portlets: Executive Drill Down Portlets



Executive Project Drill

ID	Name	Manager	Start	Finish	CAPEX Actuals	CAPEX Planned	CAPEX Budget	OPEX Actuals	OPEX Planned	OPEX Budget	CAPEX Variance	OPEX Variance	Overall	Schedule	Scope	Cost/Effot
PRJ00063	Canada Integrated POS	Dubois, Martine	6/27/16	4/4/17	8,000	690,080	0	10,000	1,457,120	0	(690,080)	(1,457,120)				
PRJ00086	China E-Commerce	Pfeiffer, Henry	4/4/16	11/25/16	0	0	0	0	0	0	0	0				
csk.infrastructure	Infrastructure Deployment Template		2/23/16	3/28/16	0	0	0	0	0	0	0	0				
PRJ00043	Project Custom - Holiday Release	Go, Camille	6/10/16	10/28/17	0	606,000	0	0	705,605	0	(606,000)	(705,605)				
PRJ00084	Digitial Strategy - Site Redesign	Pfeiffer, Henry	6/1/16	2/10/17	0	0	0	0	0	0	0	0				
PRJ00061	China Network Setup	Myrick, Christopher	6/1/16	3/31/17	0	8,680	0	0	0	0	(8,680)	0				
PRJ00069	Japan Allocation Project	Glackin, Jerry	2/15/16	11/15/16	0	1,000,000	0	0	0	0	(1,000,000)	0				

Content Highlights

Workflow Processes: Examples 4 of 65+

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;

Reply all

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

S

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**
PRJ0185 - Admin - Technical Environment Training Admin - Technical Environmvery long text	i1	17-SEP-2015	Low	Red
PRJ0012 - Create Secret Identity	Manager Hates Me	17-APR-2013	Low	Red
Past Due Risks				
PRJ0185 - Admin - Technical Environment Training Admin - Technical Environmvery long text	r1	17-SEP-2015	Medium	Red
PRJ0012 - Create Secret Identity	Lose Powers	05-DEC-2013	Low	Red
PRJ0012 - Create Secret Identity	Somebody Knows Who I Am	05-DEC-2013	High	Red
PRJ0012 - Create Secret Identity	Lose Job	17-APR-2013	High	Red

Past Due Status Report:

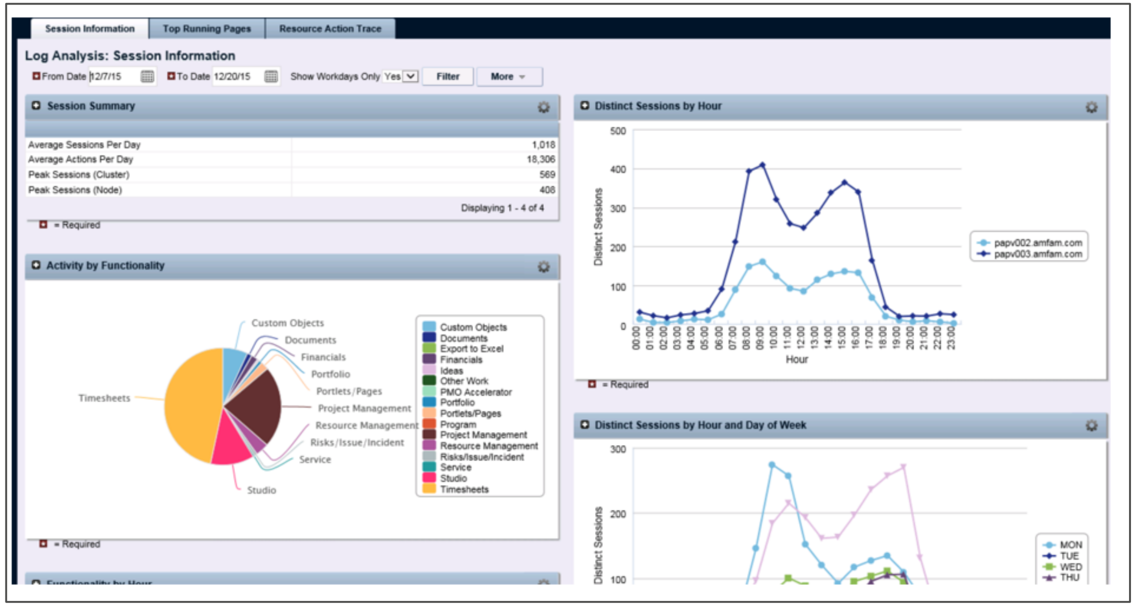
Project	Status Report	Most Recent	Overall Status	Flag
PRJ0012 - Create Secret Identity	Status on 5/24	24-MAY-2013	Critical	Red
PRJ0076 - Another Sharepoint Test	test	02-SEP-2014		Red
PRJ0185 - Admin - Technical Environment Training Admin - Technical Environmvery long text	Status 0001	15-SEP-2015		Red
PRJ0034 - JD - Test Project				Red
PRJ0135 - Milestone Type Test				Red
PRJ0075 - Sharepoint Project Test				Red

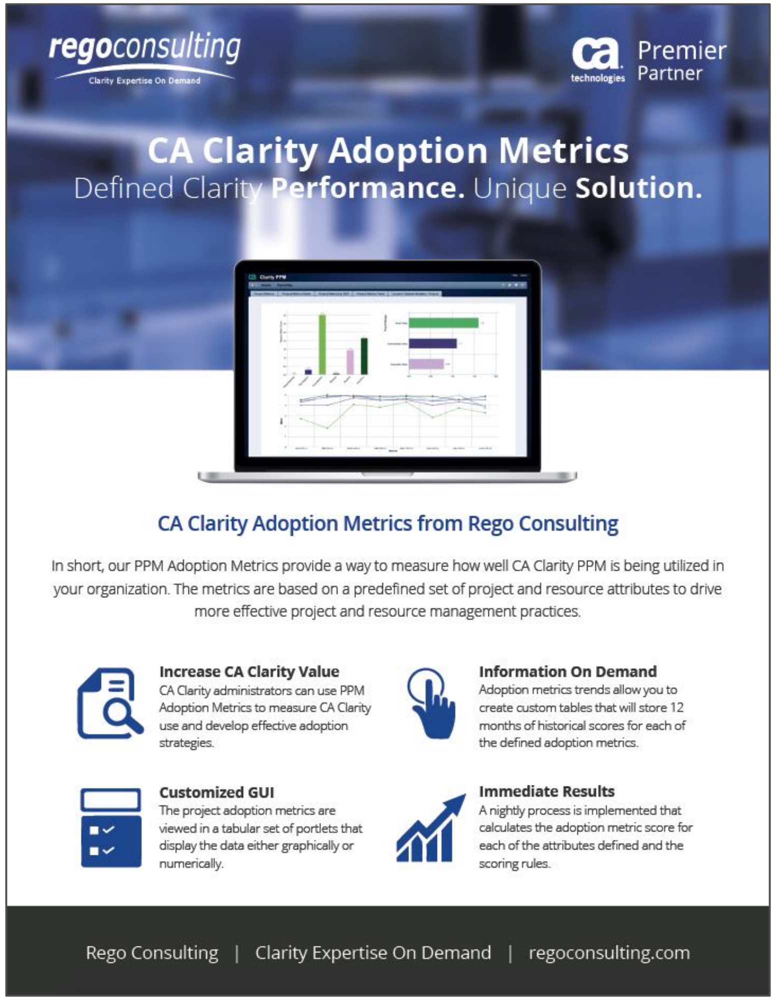
Content Highlights

Xchange+

Modules

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





Content Highlights

Training: Documents and Videos (200+ Files)

Rego Base Training: Released in Fall 2015

- 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+

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

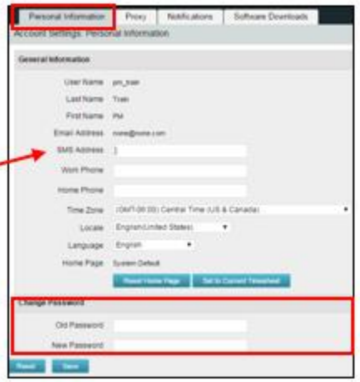
- Portlets vs. Reports, Running a Report

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
Account Settings provides quick access to your CA PPM profile. From the **Home** menu, under **Personal**, click **Account Settings.**	
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. If you would like CA PPM to send notifications to your mobile device, enter the number in the **SMS address,** and then click **Save**. *It is best practice not to manipulate the information in the Change Password section.* Your organization will have procedures in place to change your password in CA PPM.	 **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.**

Content Highlights

Jasper and PowerBI Reports

PowerBI Dashboards

Reports

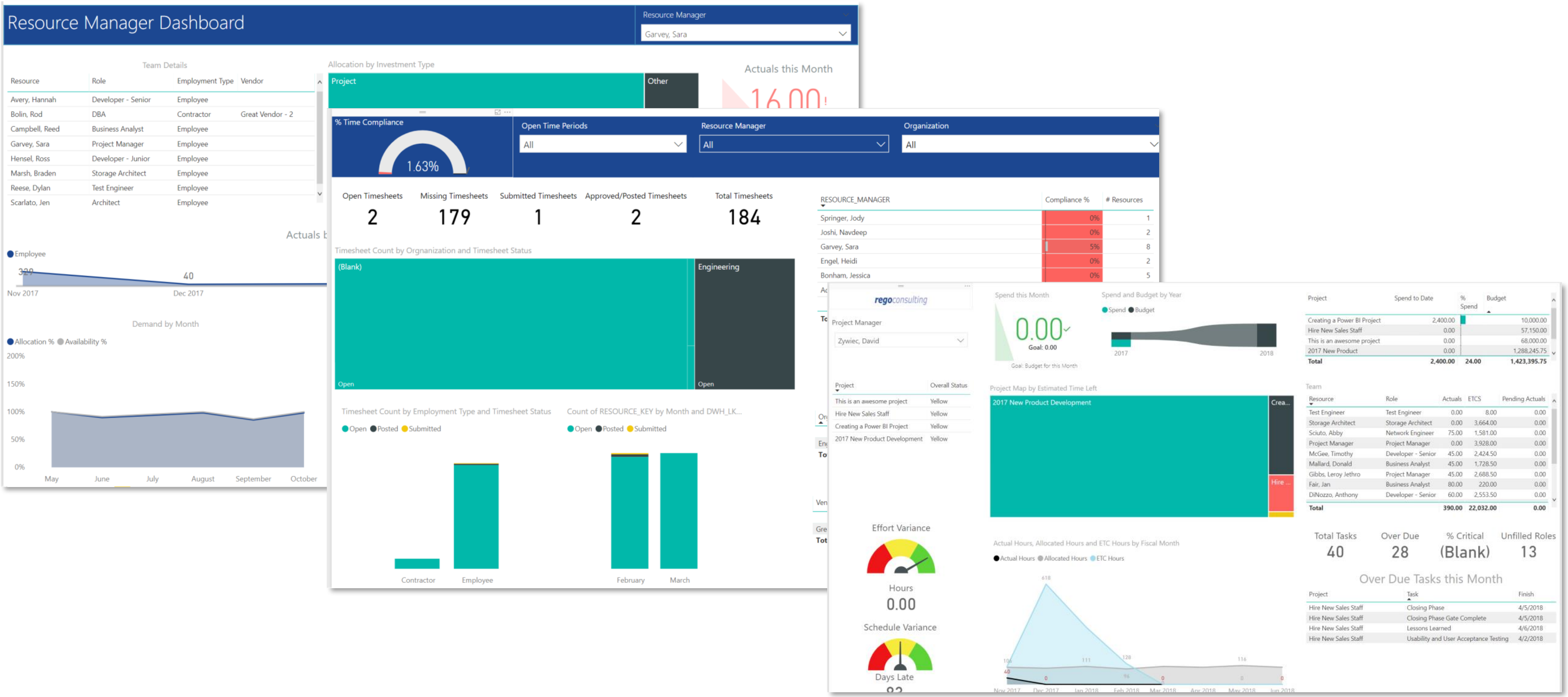
Reporting options for both Jasper and PowerBI – Most popular

- 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

PowerBI Dashboards



Questions?

regoUniversity 2019
SAN DIEGO

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at 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

Website
www.regouniversity.com