regoUniversity
NASHVILLE · 2022
RegoXchange + AIR + EDM
+ Office 365
Your Guides:
Josh Leone, Luis Palacios, and Eric Taylor

Agenda

- Introduction
- Rego Innovations – Overview
- RegoXchange
- Rego Add Ons
  - Excel Data Manager
  - Action Item Responder
  - Office 365 and Microsoft Office

Introduction

Introductions

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

Overview of Rego Innovations

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

- Leverage solutions that use OOTB capabilities or well-known technologies
- Try to lower or avoid maintenance costs
- Three Areas:
  - RegoXchange – Individual content
  - RegoXchange – Complex Configuration Modules
  - Integrations
  - AddOns

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 15 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 (1,400+ solutions)

RegoXchange complex Configuration Modules

- MUX Migrator
- Communication Object
- Roles in Roadmaps
- Business Transformation
- Contract Management
- Performance Monitoring
- Adoption Metrics
- Lessons Learned Module

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

regoLink

integrations for Clarity

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

+ableau Azure Data lake

Spotfire QlikView

Rego Add-ons

- All inbound connectors have the same base foundation
- Excel Data Manager
- Action Item Responder
- Office 365
  - SharePoint/MS Teams and Collaboration
  - Outlook Calendar Sync
  - Microsoft Project
- Scheduler Connectors
  - Microsoft Project Smartsheet
- Office 365 – Outlook and PPT Plugins

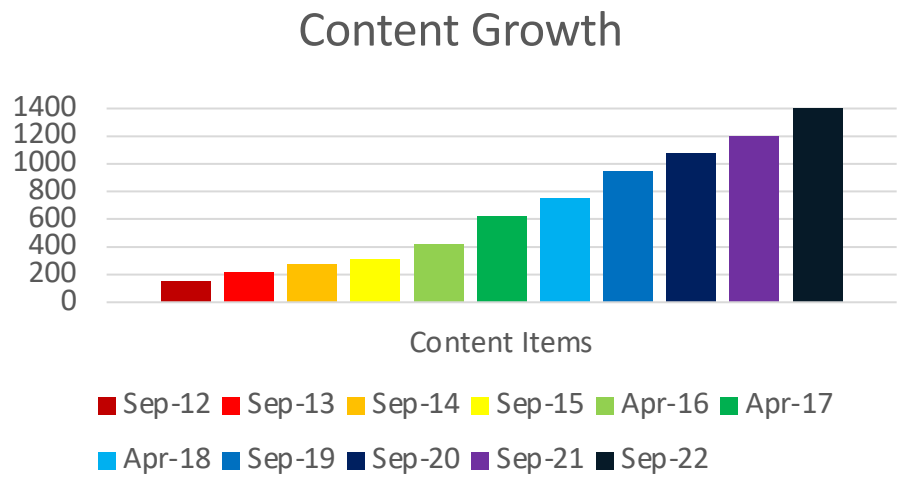
The future…

- Mobile
- Augmented Intelligence

RegoXchange

regoXchange: Quick Overview

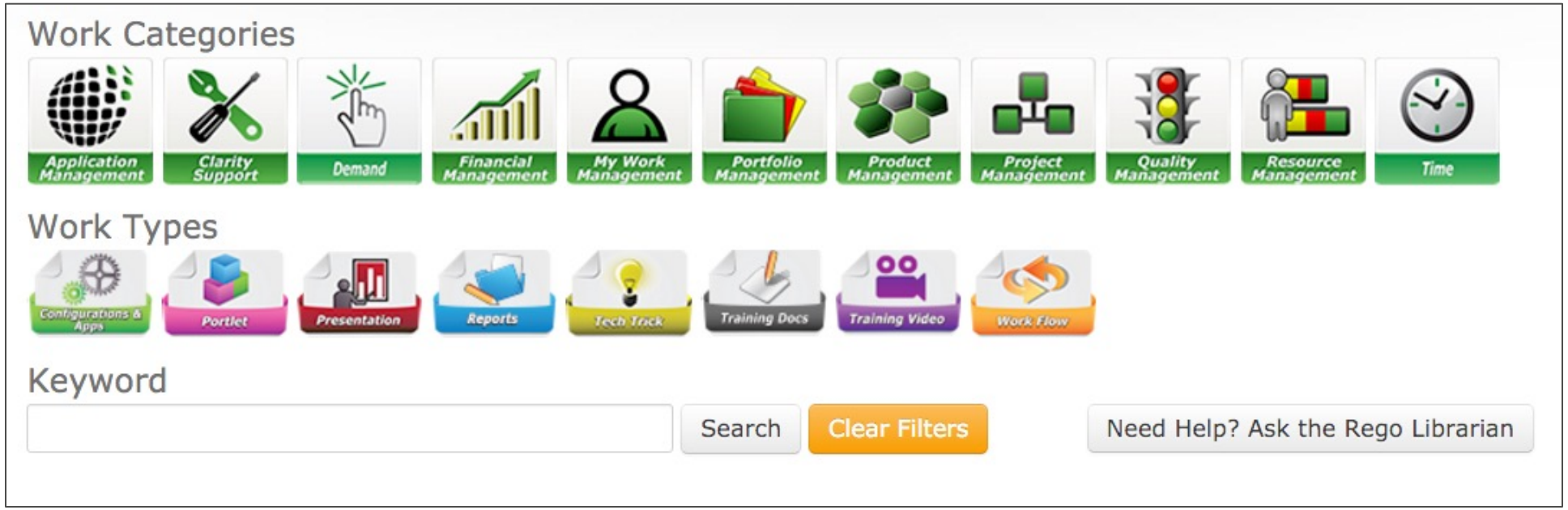
- The regoXchange went live 10 years ago and started with about 150 content items



- The user base consists of more than 3400 individuals representing more than 1100 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

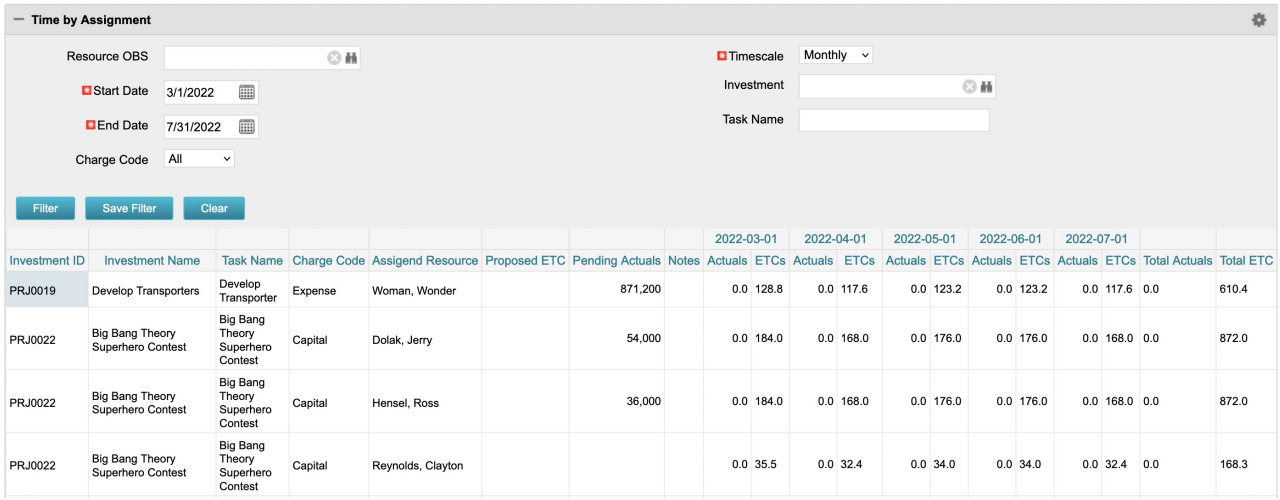


Content Highlights

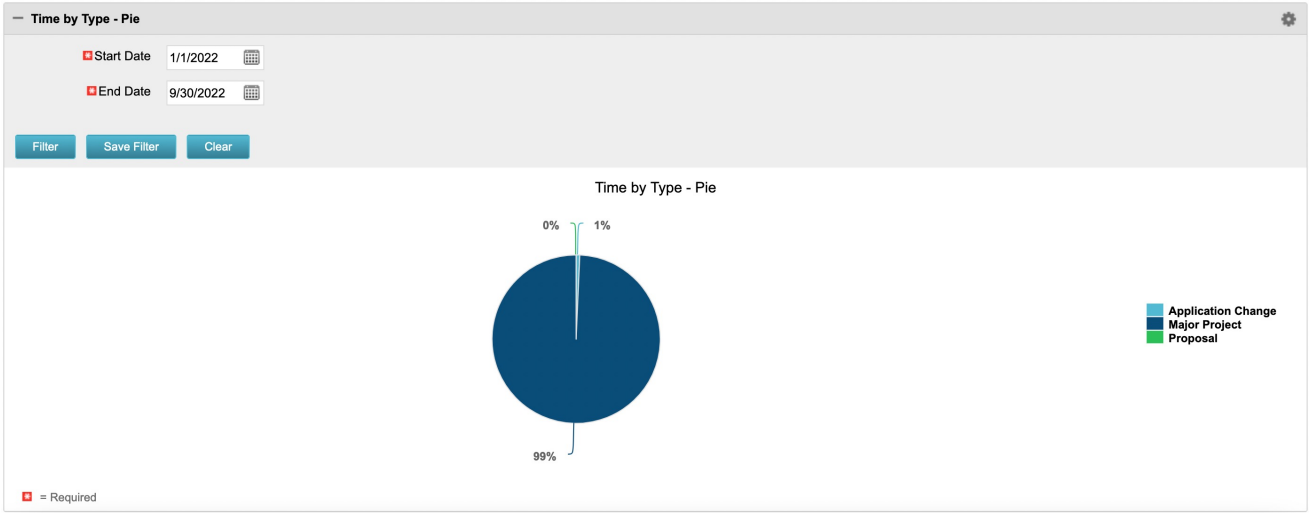
Portlets: Examples 2 of 200+

Portlets: Time by…

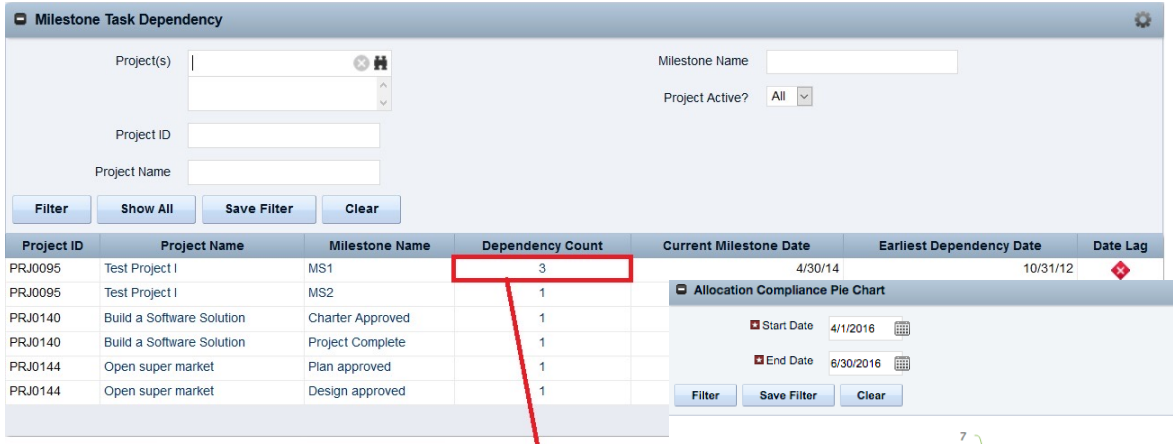
- Time by Assignment
- Time by Investment
- Time by Resource
- Time by Resource and Investment
- Time by Stage and Timescale
- Time by Task
- Time by Task Stage
- Time by Type – Pie Chart

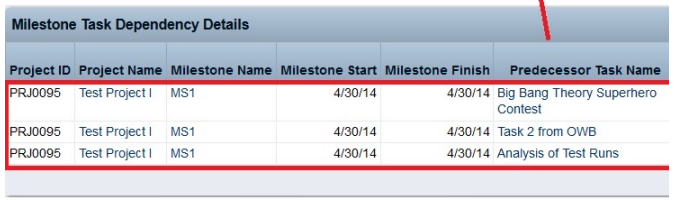


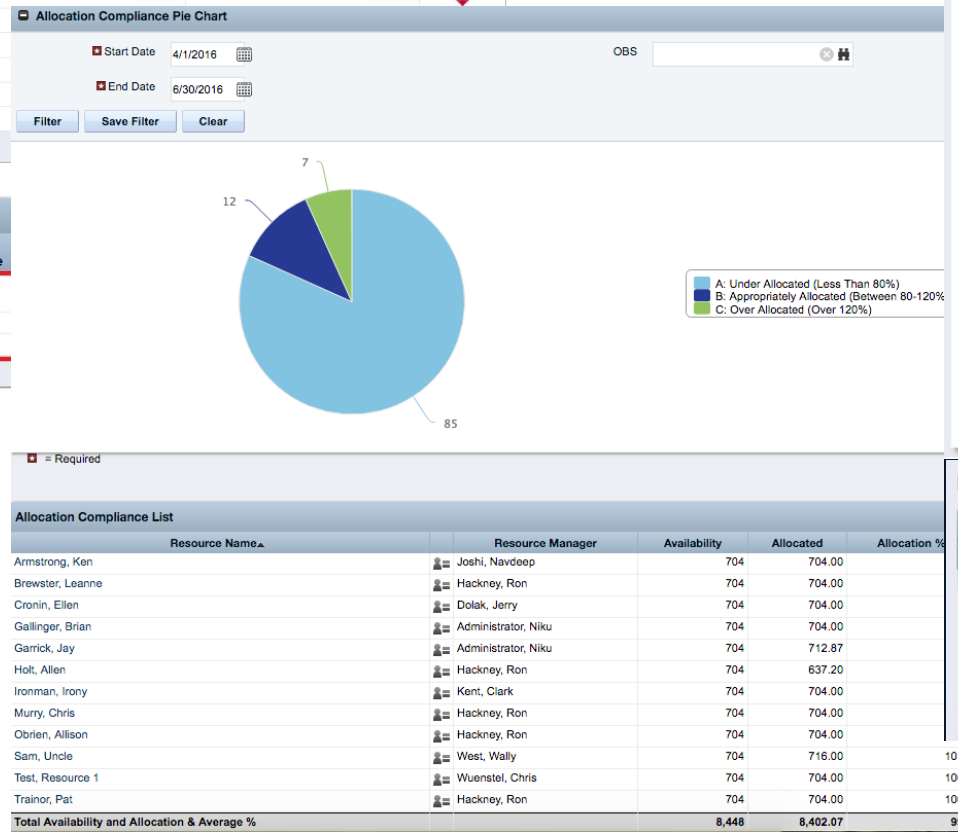
Investment ID	Investment Name	Task Name	Charge Code	Assigend Resource	Proposed ETC	Pending Actuals	Notes	2022-03-01 Actuals	2022-03-01 ETCs	2022-04-01 Actuals	2022-04-01 ETCs	2022-05-01 Actuals	2022-05-01 ETCs	2022-06-01 Actuals	2022-06-01 ETCs	2022-07-01 Actuals	2022-07-01 ETCs	Total Actuals	Total ETC
PRJ0019	Develop Transporters	Develop Transporter	Expense	Woman, Wonder		871,200		0.0	128.8	0.0	117.6	0.0	123.2	0.0	123.2	0.0	117.6	0.0	610.4
PRJ0022	Big Bang Theory Superhero Contest	Big Bang Theory Superhero Contest	Capital	Dolak, Jerry		54,000		0.0	184.0	0.0	168.0	0.0	176.0	0.0	176.0	0.0	168.0	0.0	872.0
PRJ0022	Big Bang Theory Superhero Contest	Big Bang Theory Superhero Contest	Capital	Hensel, Ross		36,000		0.0	184.0	0.0	168.0	0.0	176.0	0.0	176.0	0.0	168.0	0.0	872.0
PRJ0022	Big Bang Theory Superhero Contest	Big Bang Theory Superhero Contest	Capital	Reynolds, Clayton				0.0	35.5	0.0	32.4	0.0	34.0	0.0	34.0	0.0	32.4	0.0	168.3

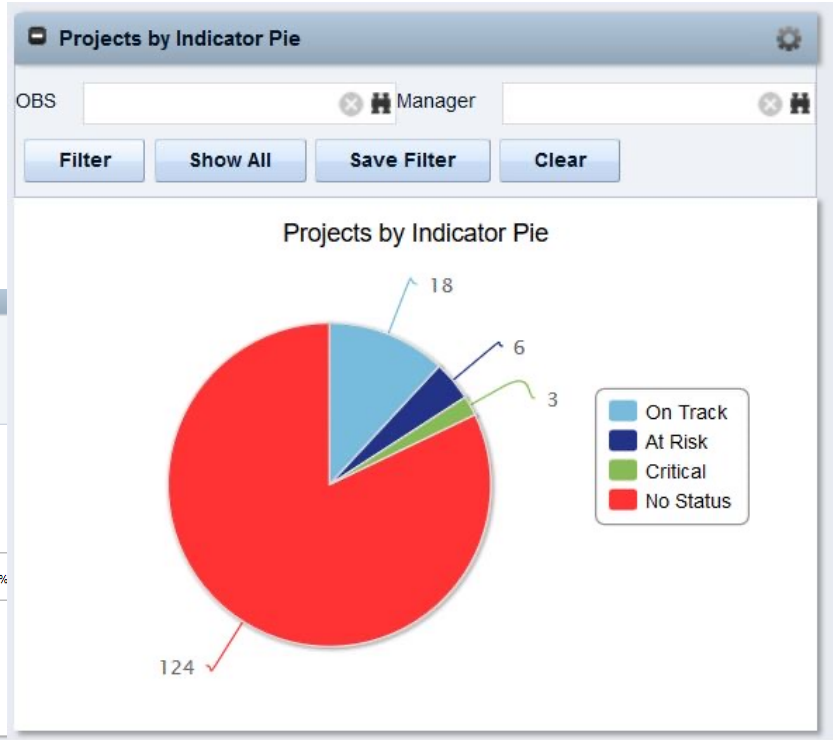


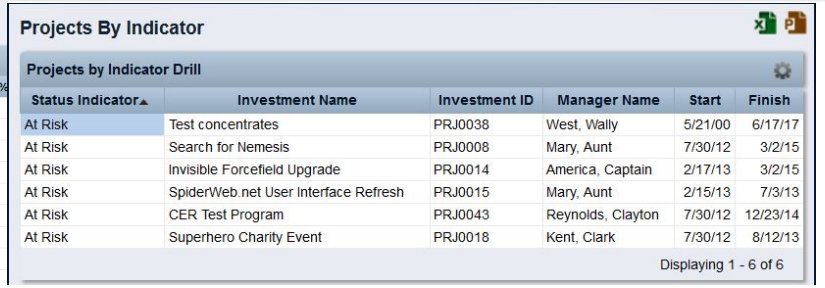
Portlets: Drill Down Portlets





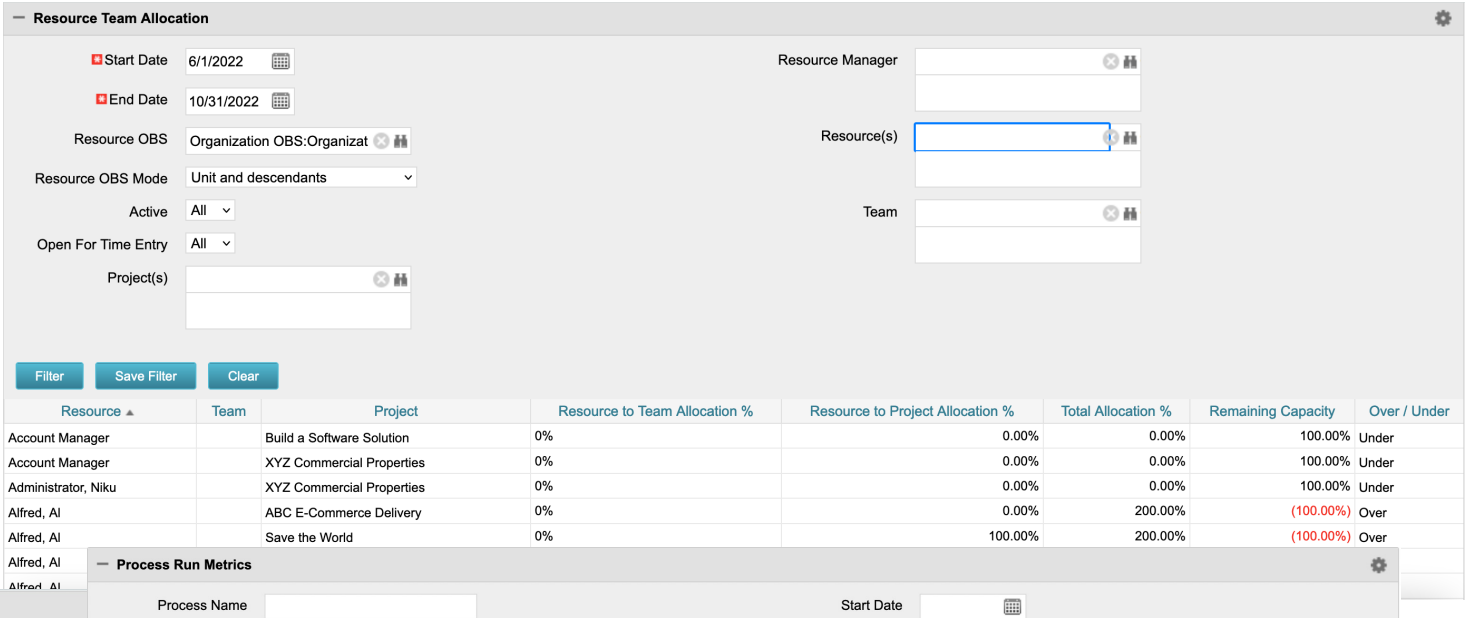


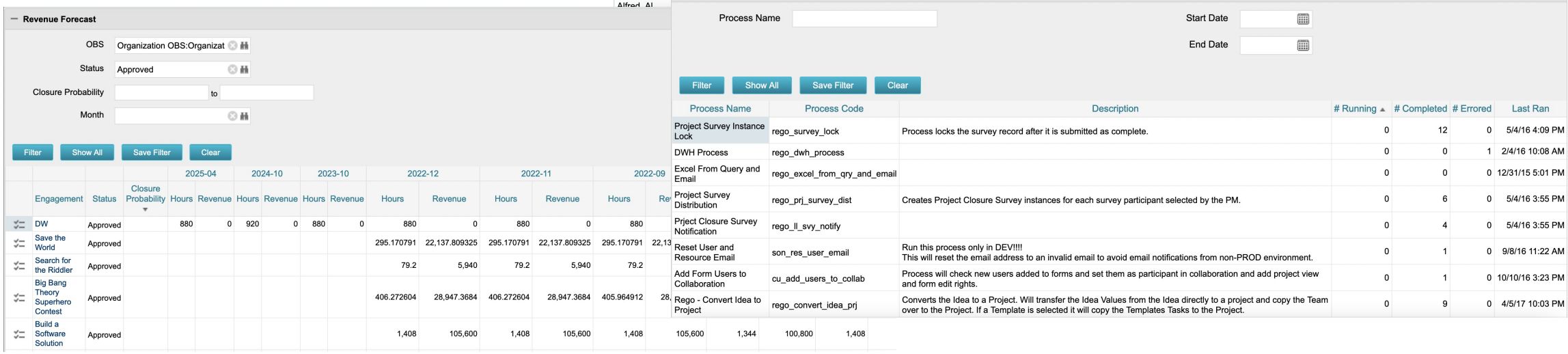




New Portlets – 2022

- Resource Team Allocation
- Group Rights
- Process Run Metrics
- Revenue Forecast





Content Highlights

Workflow Processes: Examples 11 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

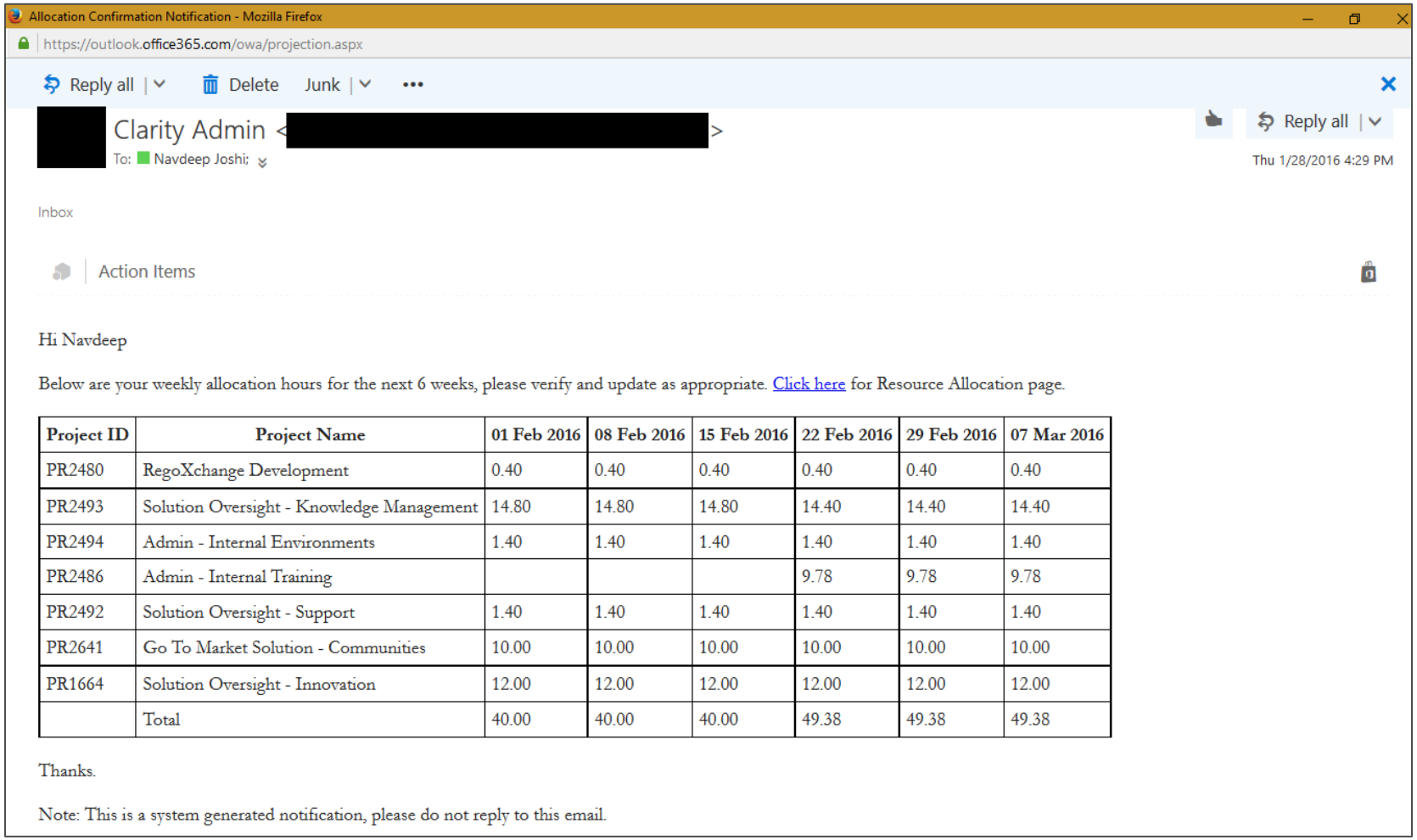
You are receiving this email because at least one project currently assigned to you has data that is out of compliance. Please review the list below and address all compliance issues ASAP.

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

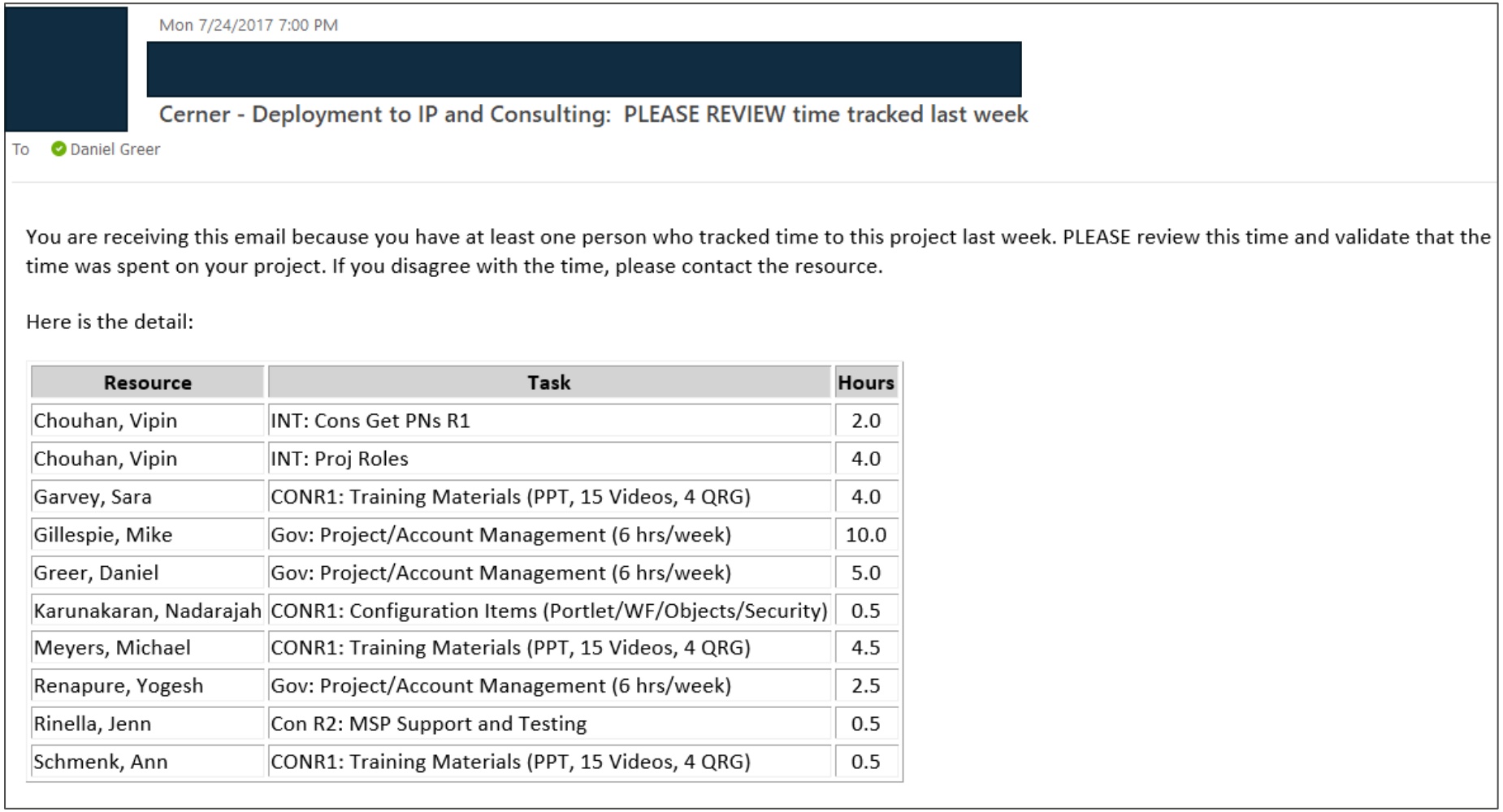
Below are your weekly allocation hours for the next 6 weeks, please verify and update as appropriate. Click here for Resource Allocation page.

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

[redacted]

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

Additional Popular Workflows

- Create Forecast from Actuals and Allocations
- PM Task Time Notification
- Cost Plan Population Process
- Action Item Reassignment
- Timesheet Approval – Auto
- Auto-Approve Old Timesheets
- Open and Close Periods

Content Highlights

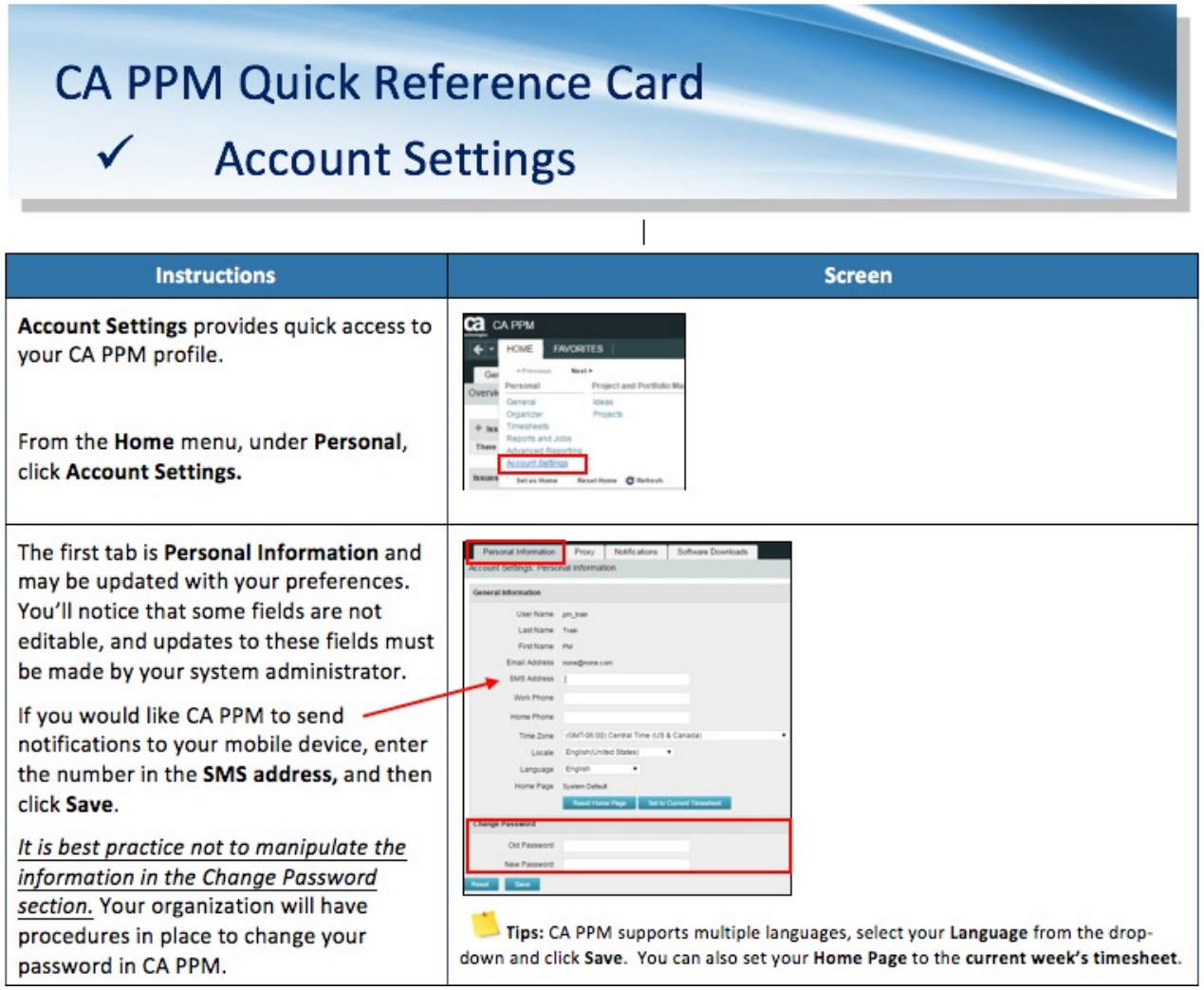
Training: Documents and Videos (300+ Files)

Rego Base Training

- 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

Quick Reference Cards

- Clarity Basics – 26
- Demand Management – 11
- Financial Management – 10
- Portfolio Management - 5
- Program Management – 6
- Project Management – 54
- Resource Management – 16
- Time Management – 11
- Modern UX Specific – 100+



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.**

Modern UX Training Content

- We recently released over 100 new training documents, many of which are related to the Modern UX, v16.0++
  - Time Entry and Approval – 9 docs
  - Roadmaps – 5 docs
  - Resource Management – 14 docs
  - Project Management – 26 docs
  - Portfolio Management – 5 docs
  - Navigation – 11 docs
  - Financials – 15 docs
  - Demand Management / Ideation – 10 docs
  - Blueprints – 6 docs
  - New Jaspersoft Training – 9 docs
  - Hierarchies, Custom Investments and more – 29 docs

Content Highlights

Jasper and PowerBI Reports

PowerBI Dashboards

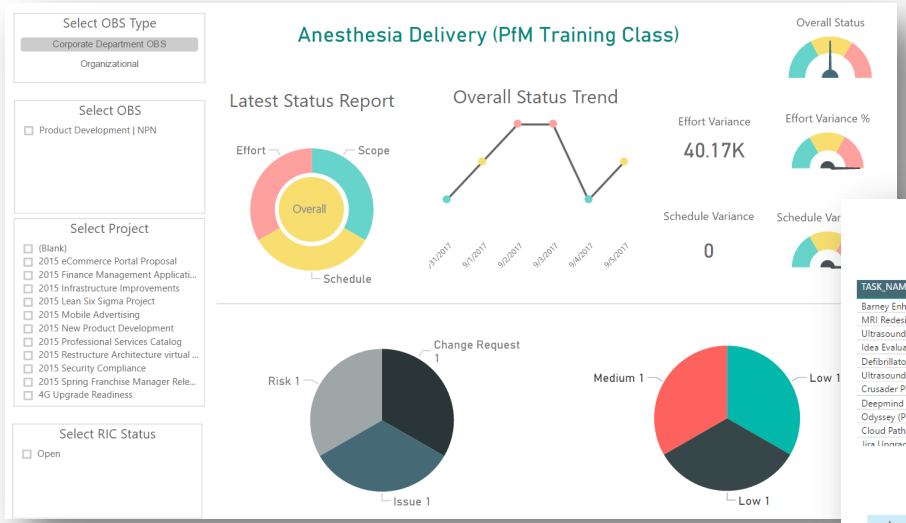
Reports

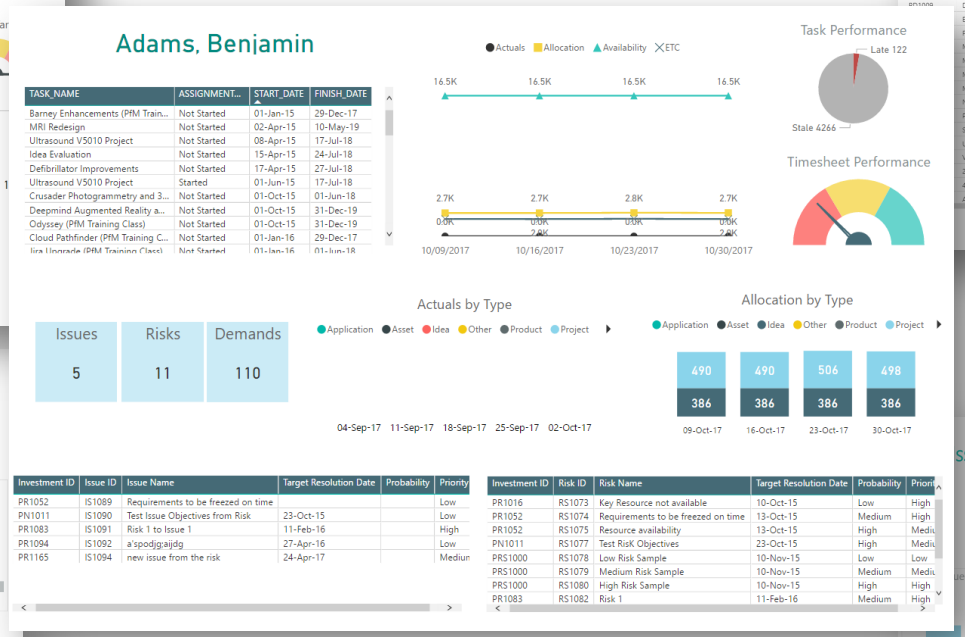
Reporting options for both Jasper and PowerBI – Most popular

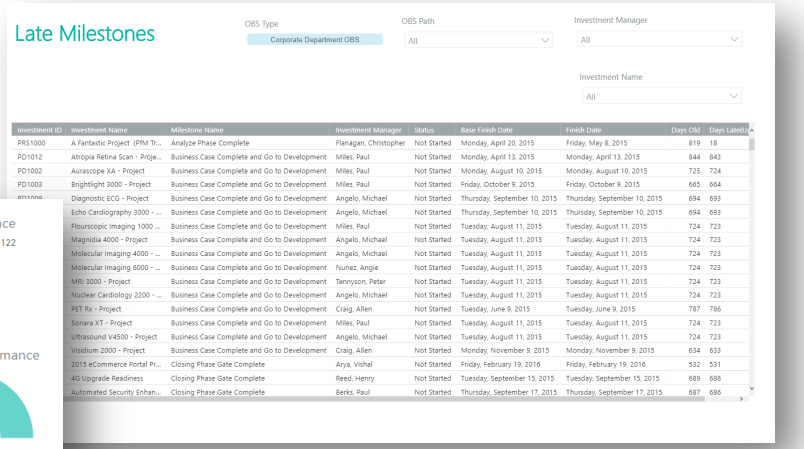
- Project Count by Stage (JS/PBI)
- Projects by Status Indicator - Pie (JS)
- Projects within Baseline Finish (JS)
- Project Budget vs Planned vs Actual by Mon. (JS/PBI)
- All Issues (JS/PBI)
- All Tasks (JS/PBI)
- All Assignments (JS/PBI)
- Time by Investment (JS)
- Project Status and Costs (JS/PBI)
- 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)

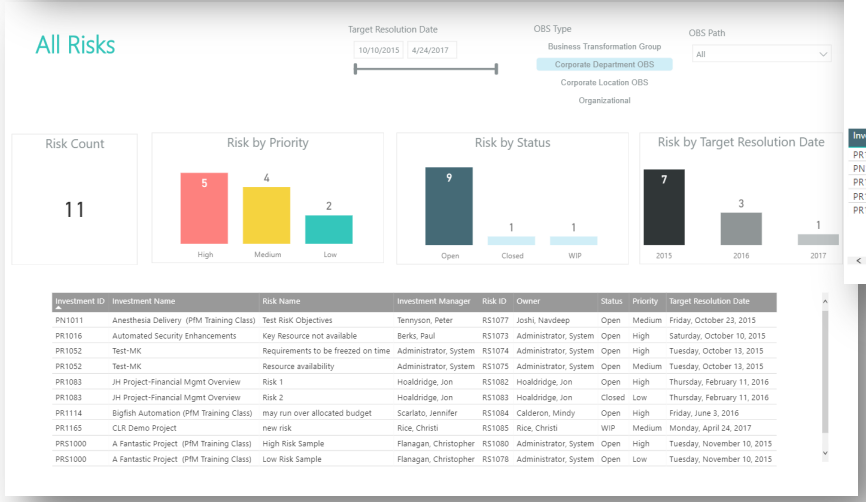
Over 40 PowerBi Reports!

PowerBI Reports - Examples

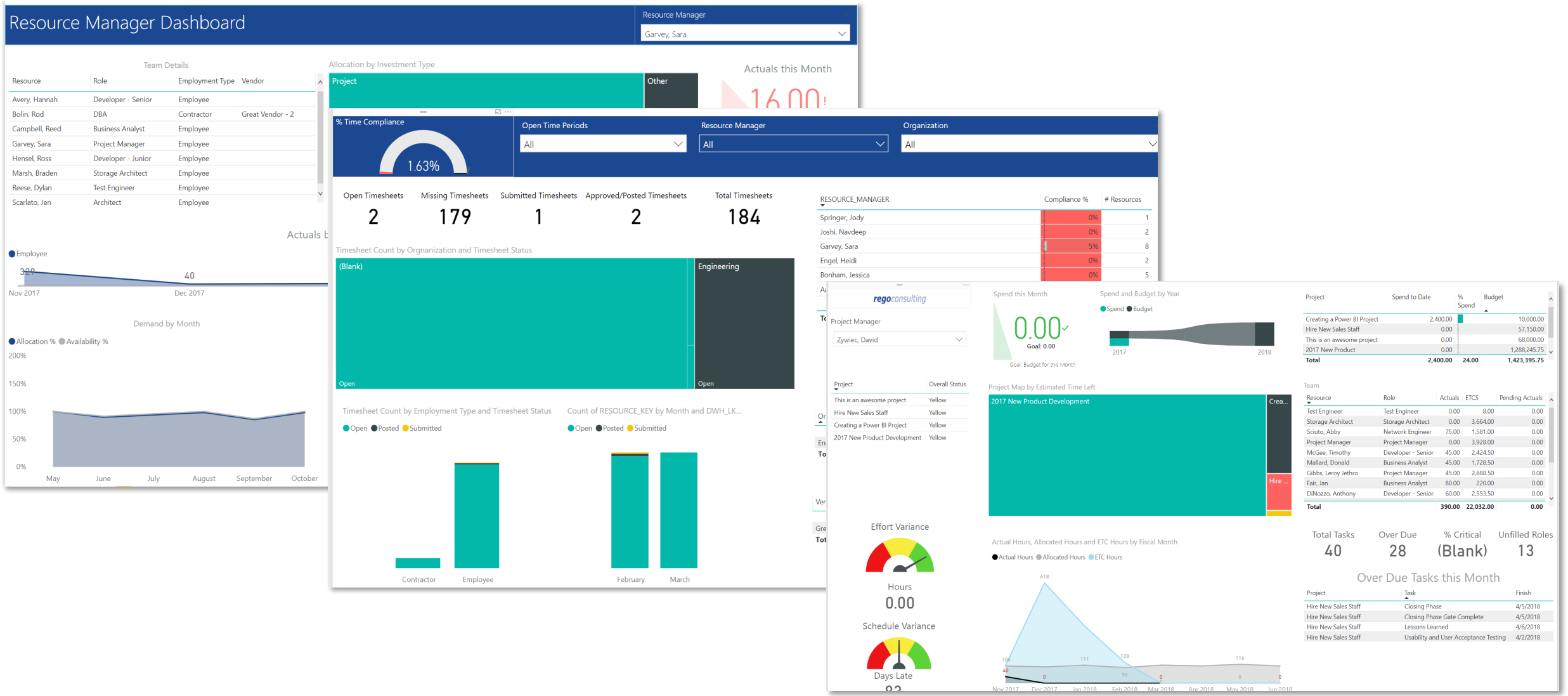








PowerBI Dashboards

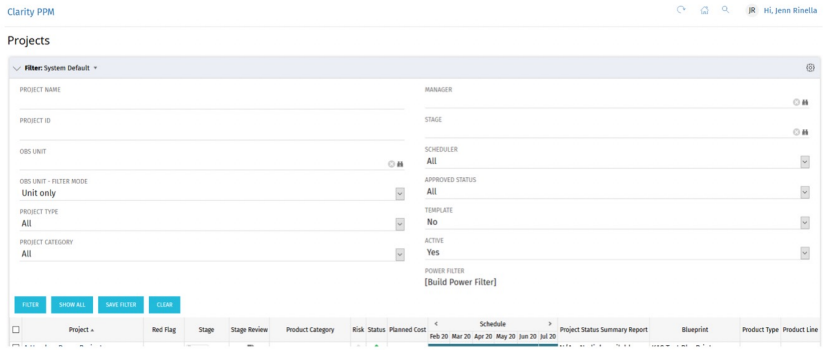


Rego's Version of the Phoenix UI

- We modified the OOTB Phoenix UI to clean it up and eliminate some of the dead space.

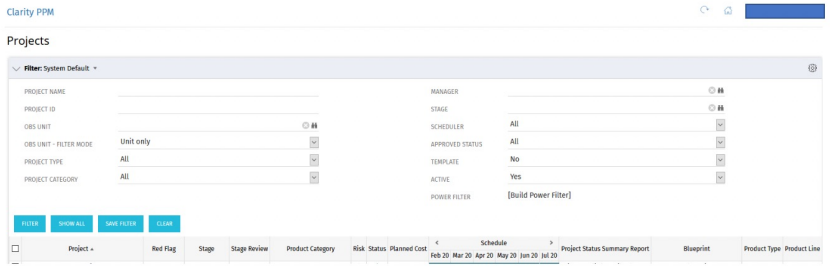
Out of the Box Phoenix UI Menu

OOTB Phoenix UI – Project List Filter



Rego New Phoenix UI Menu

Rego New Phoenix UI - Project List Filter



Rego AddOns

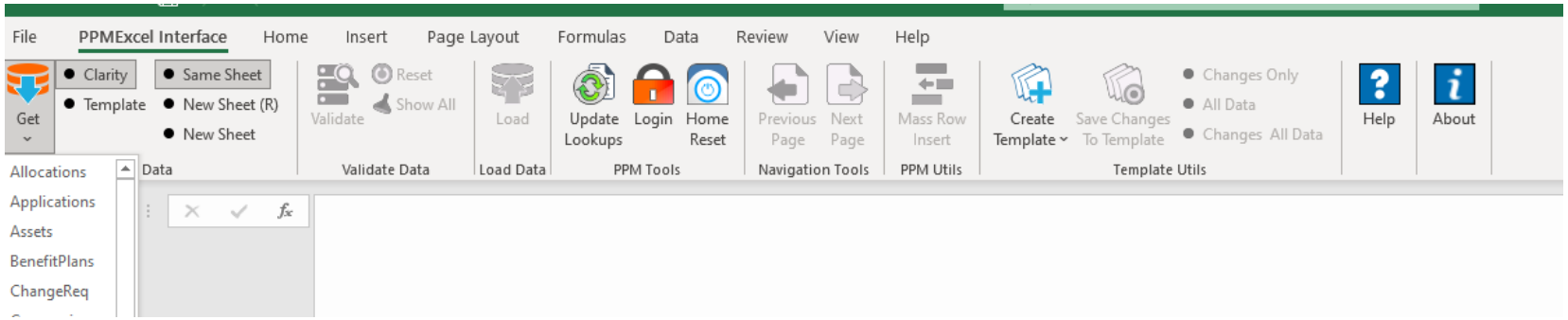
Excel Data Manager

Excel Data Manager

- Allows users to process Clarity data in Microsoft Excel:
  - Extract Data: Easily Extract through predefined or custom interfaces
  - Edit Data: using Excel's functionality like (filters, sorting, copy and paste, drag and drop, etc). While enhancing the experience with Clarity specific logic like data types.
  - Validate Data: Validate the data similar to how Clarity does it: using lookups and attribute types work
  - Send Data: Send large data sets through Rego's Data Processor
- While at the same time, guardrails must be enforced for:
  - Authentication and interface access
  - Data validations
  - Use and maintain templates
  - Error Handling and Notifications

Extract Data

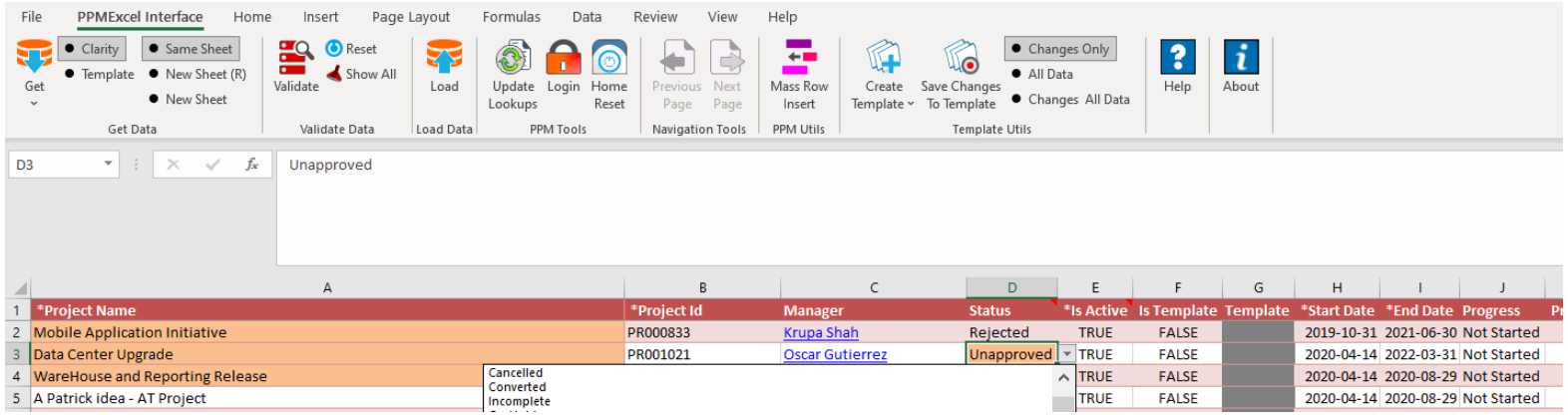
- Extract Data
  - Using one of the 25 samples provided by Rego
  - Custom Interfaces built to match your environment
- Data is handled via XOG making it GCP, AWS and On Premise compatible
- Easy to use Excel Ribbon to interact with your environment. Allows you to select the data and filtering criteria

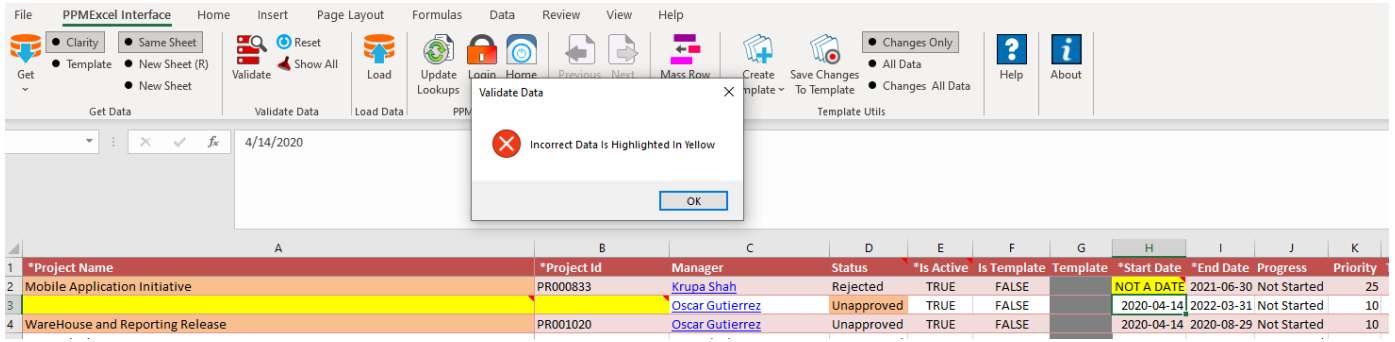


- Applications
- Assets
- Change Requests
- Companies
- Ideas
- Incidents
- Issues
- Locations
- Lookups
- Others
- Products
- Programs
- Project Teams
- Rate Matrix
- Release Plans
- Releases
- Requirements
- Resources
- Risks
- Roles
- Services
- Skills
- Tasks
- Users

Load Data

- Modify Data via Excel functionality like formulas, copy/pate, search/replace, etc.
- Visual aids to show modified, validated (invalid and valid records) and loaded data
- Enhanced validations: Required fields data types, Clarity Lookups (Static, Dynamic, Dependent), etc.





Rego AddOns

Action Item Responder

Why this Solution?

- Clarity's workflow engine is one of the most powerful on the market, allowing all types of invested stakeholders the opportunity to participate directly in process-driven activities, reviews, and approvals.
- The stock solution that facilitates this interaction, however, is inefficient, rooted in the Classic UX, and requires licenses for each participant:
    1. Log into the system.
    2. Navigate to a workflow-generated action item.
    3. Click into the associated object to see its details.
    4. Return to the action item to finally provide an assessment.
- Solving this challenge was a top priority for Rego as a means to unlock the potential of Clarity's workflow engine, and why we have spent hundreds of hours researching for a simple way to respond directly within email to action items. This research has led to a solution that meets our high standards - simple, fast, and inexpensive.
- This service allows users to respond to actions simply and easily within their email - eliminating the extra login step while presenting all the information needed to make the decision within the body of the email. Some examples include:

Review/Approval/Rejection of Timesheets

Ideation Validation and Conversion Approval

Approval/Rejection of a Change Request or Budget Revision

Stage Gate Reviews

Overview

What You Can Do

- Create workflow process actions that route to anyone via email, embedded with all necessary contextual details and attachments.
- Allow those participants in the workflow processes to respond to action items simply and easily within email directly.
- Add notes to the response that are passed back to Clarity along with the outcome.

Limitations = NONE

- 100% out-of-the-box capabilities, leveraging workflows with GEL and standard APIs
- On-Premise and On-Demand (GCP, AWS)
- Any supported version of Clarity

Value to Customers

- Improve adoption & perception; simple and easy to use.
- Reduce cycle time; responses can be provided anywhere / anytime.

What You Get with Subscription

- Unlimited use in any workflow for any object; no restrictions
- Rego kick-off assistance; knowledge transfer and support creating the first workflow response

Email Examples

Example Idea Submission

Dear Leo Dsouza,

The **Idea** below has been submitted for your approval.
You may mark this Idea **Approved**, **Rejected** or **Incomplete** with the buttons below.
A new email will be generated where you can add notes. Click send on that email to submit.

Idea Name	Requestor	Type	Priority	Goal	Planned Cost	Planned Benefit	Department
Build a bunker	Josh Leone	Survival	3	Survive bad stuff	$30,000	$10,000	Infrastructure
Description							
In order to survive the pending nuclear disaster, we need build a bunker to store all the important stuff.							
Objective							
If we keep the important stuff safe it will allow us to survive longer.							

Approve | Reject | Incomplete

If you have questions or comments regarding this notification, please contact CA PPM Support.

Thank you!
CA PPM Admin

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

Rego Add-ons

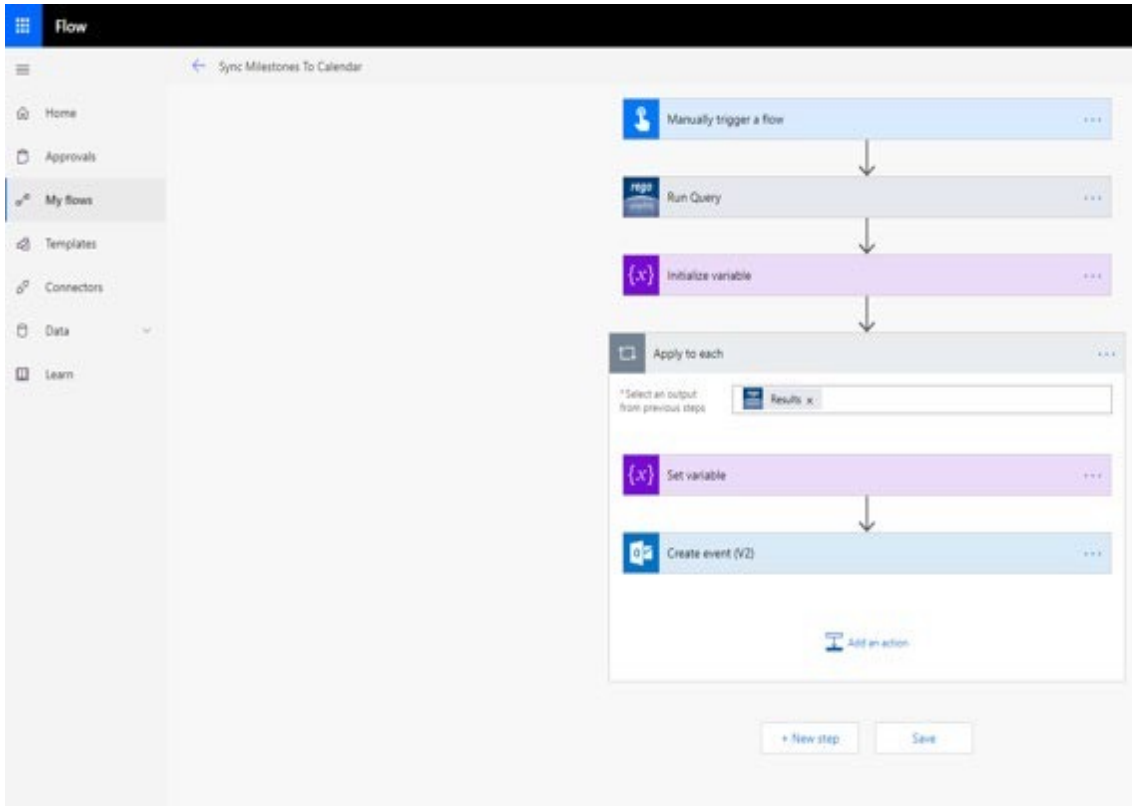
Microsoft Solutions

Relies on MS Power Automate

Power Automate

Microsoft Flow

- **Using Microsoft Flows**
  - Robust Workflow/Process based application via a browser UI
  - No-Code approach, mainly drag and drop
  - Allows you to automate and connect applications through actions and triggers
  - Includes all of 365's functionality for administrators, end users and governance
  - Has over 500 connectors to MS Services and third party apps:
    - Sharepoint and SP Lists
    - MS Forms
    - Dynamics
    - Power Apps
    - Outlook/Calendars
- **Harness the power of Microsoft Flow for**:
  - Integrations
  - Approvals and Notifications

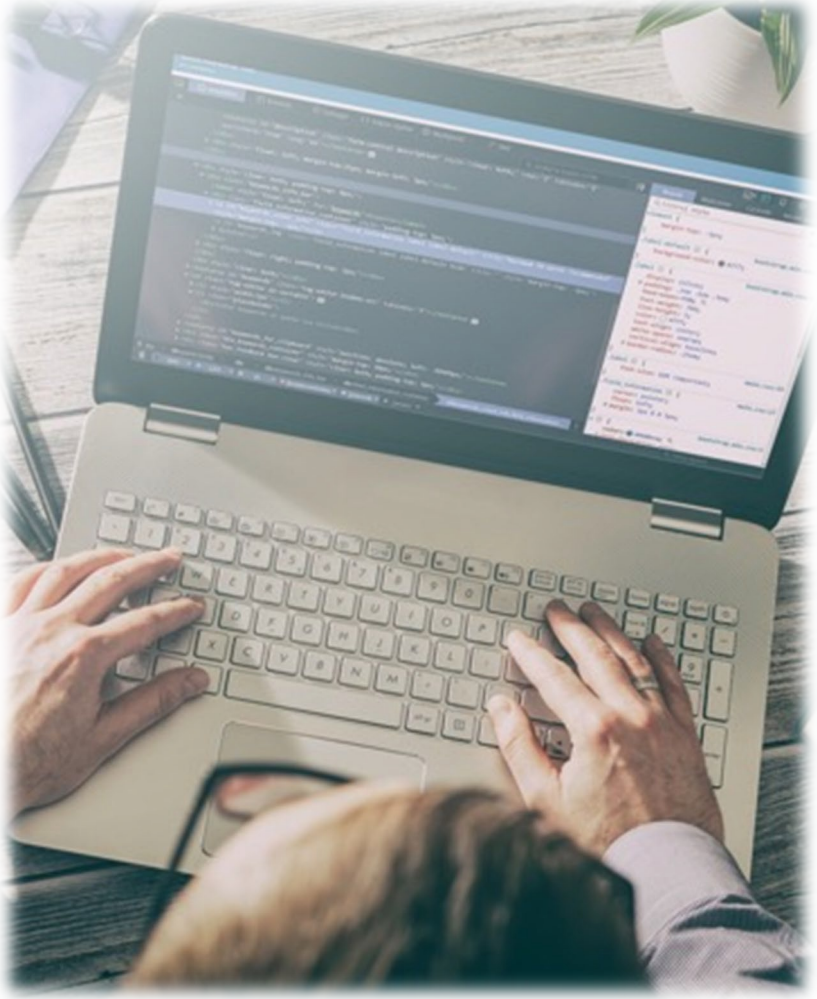


RegoLink Connector

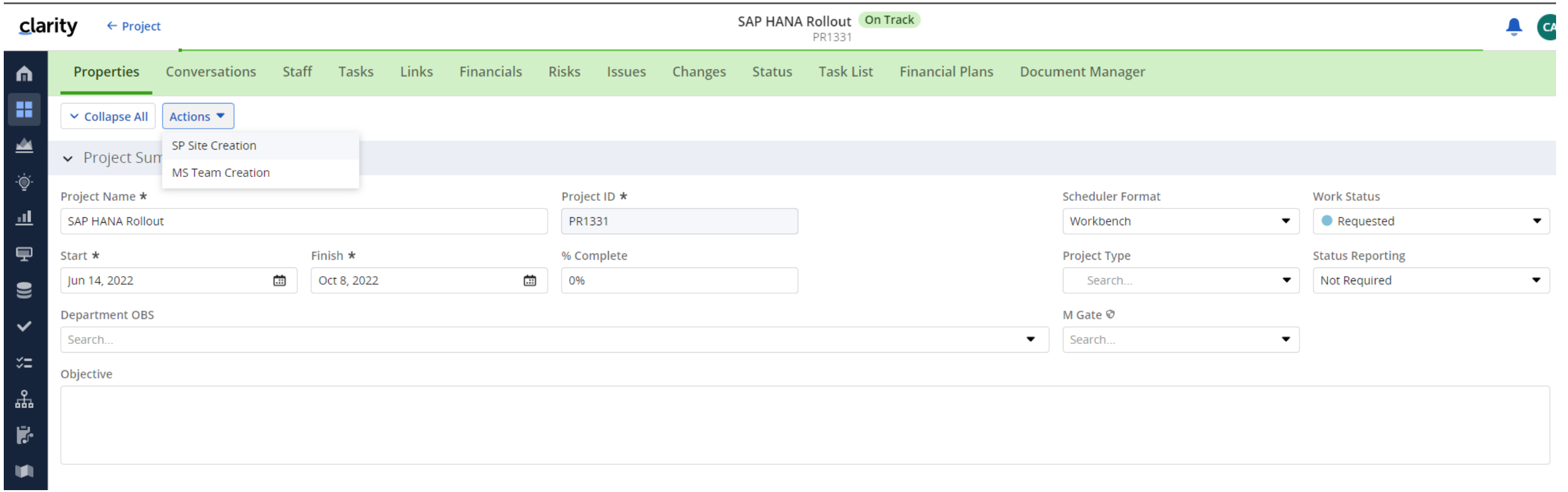
- Supports On-Premise SharePoint
  - (Office 365 Gateway) and Office 365

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

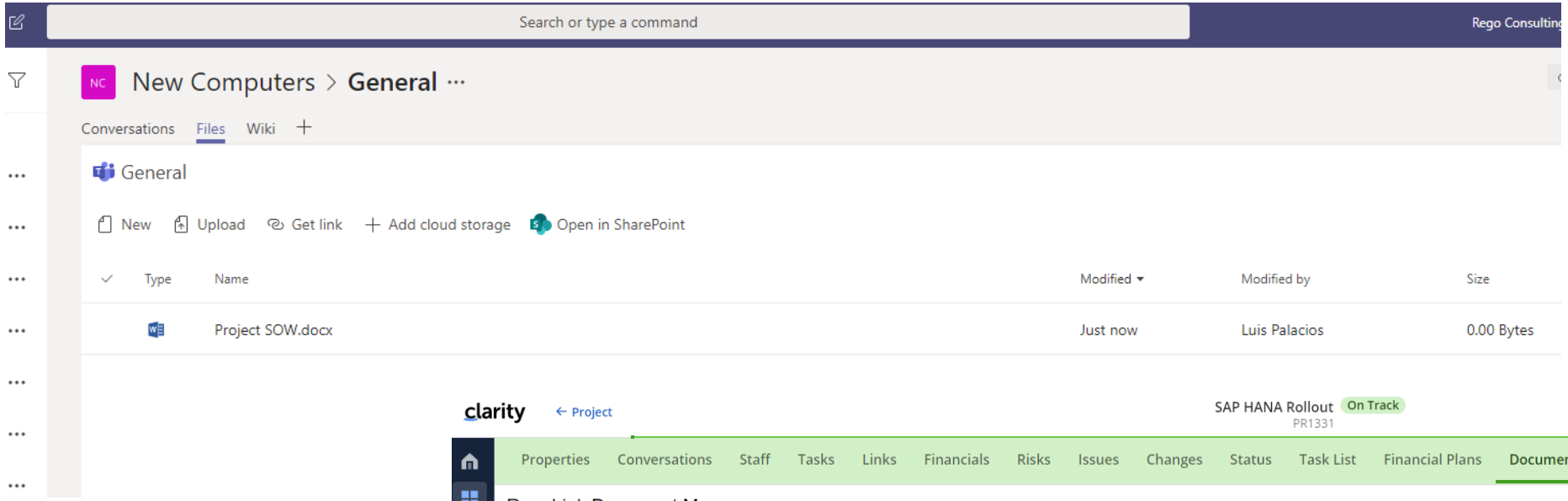
- Enable Webhook Support for Clarity PPM

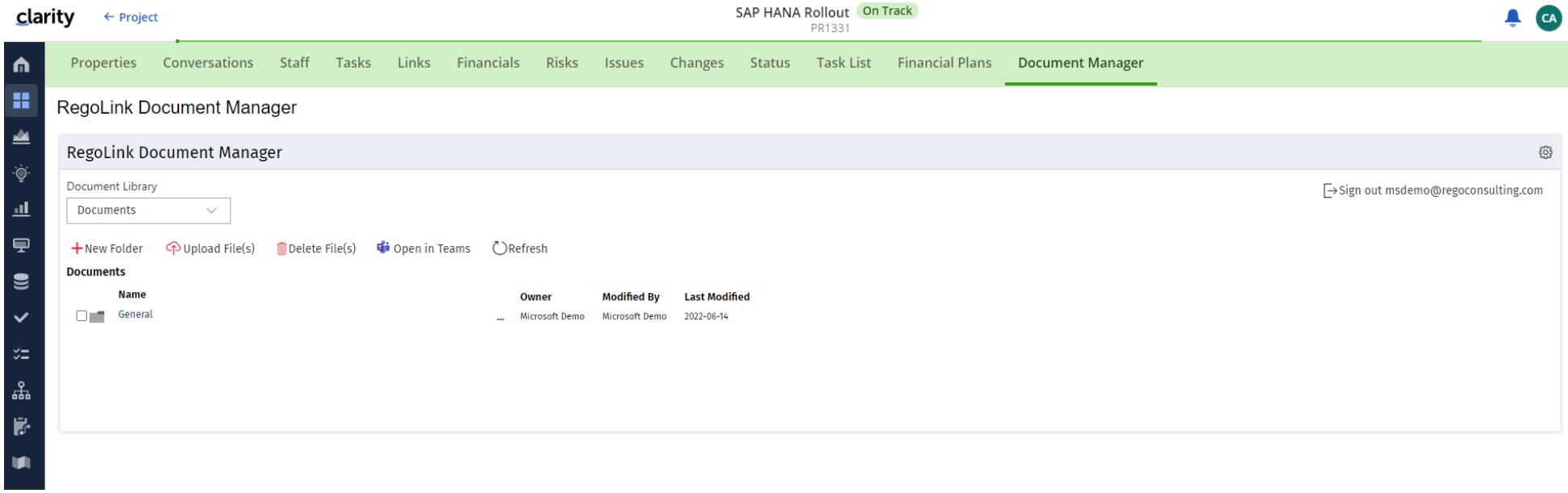


Document Management and Collaboration

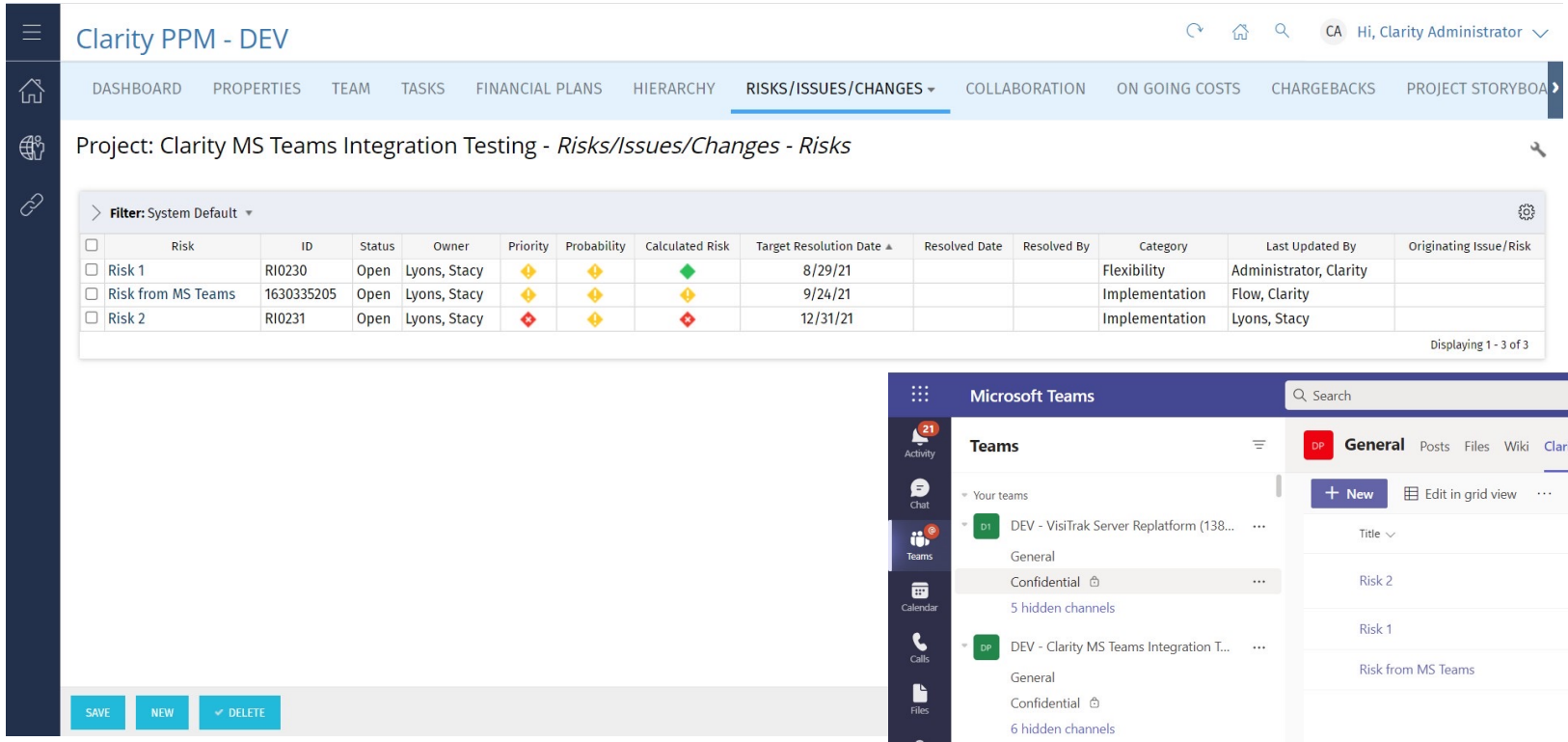


Document Management and Collaboration

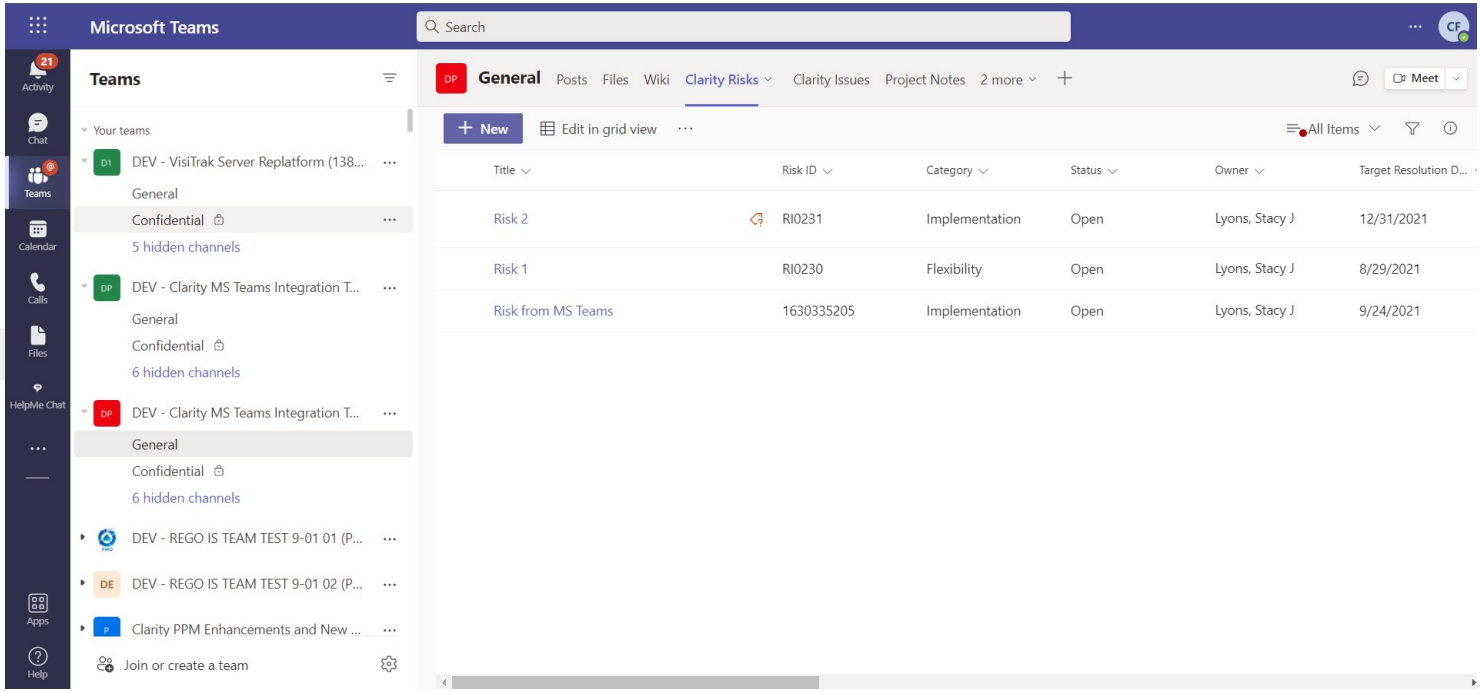




Integrate RIDAC



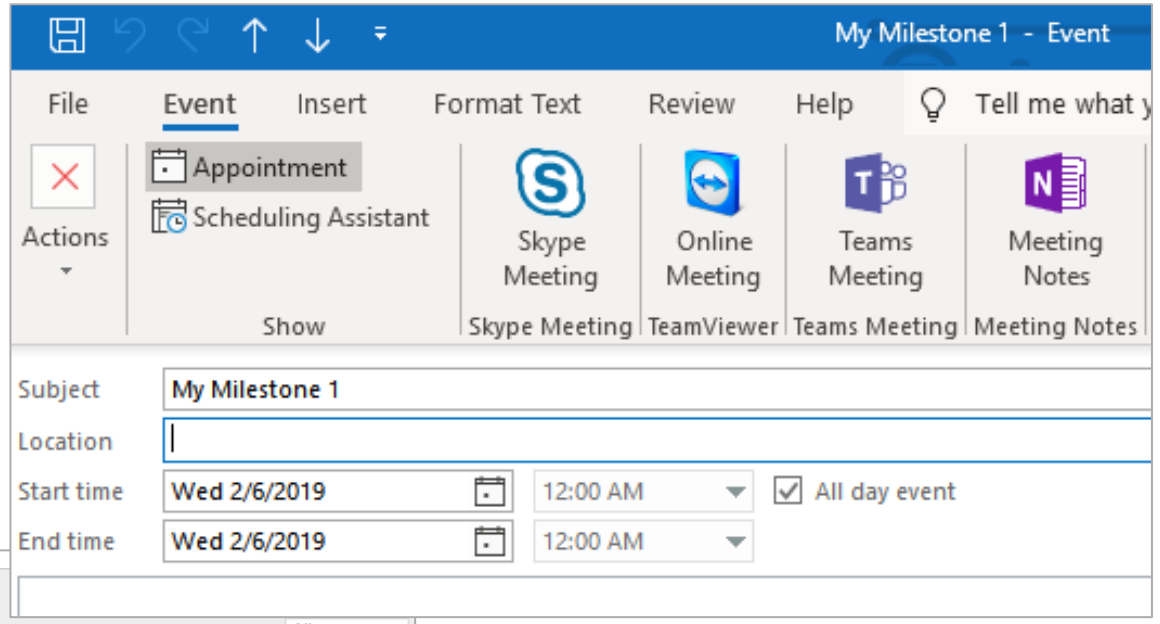
Create your risks/issues in Clarity or in Teams and have them reflected in the Other system.

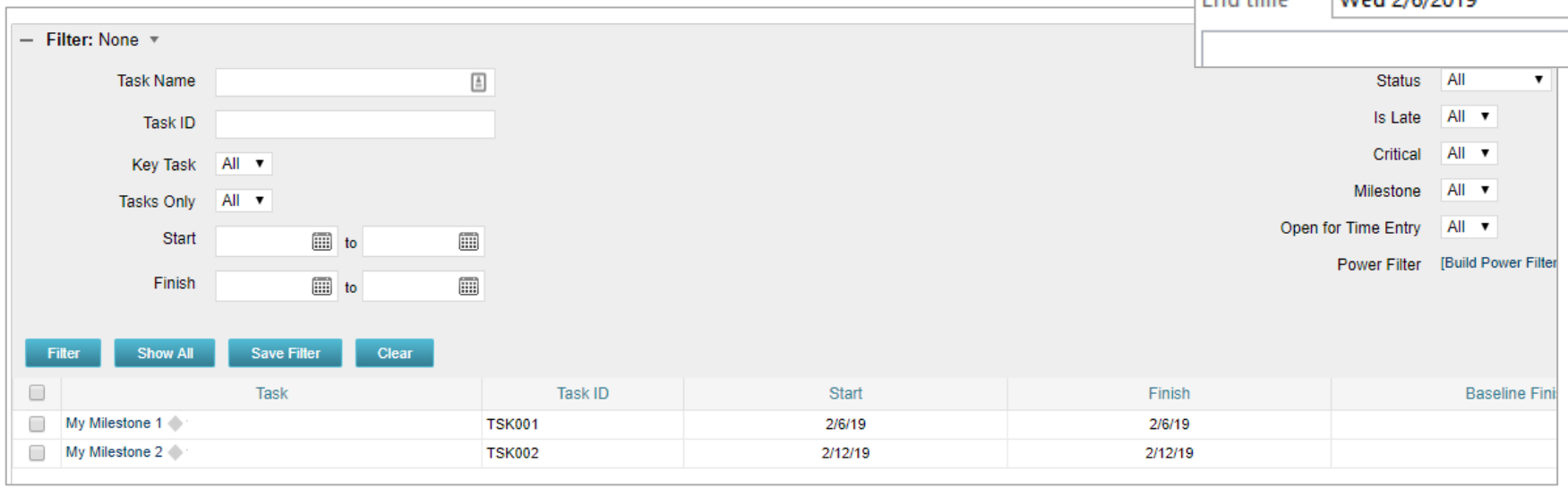


rego consulting | clarity

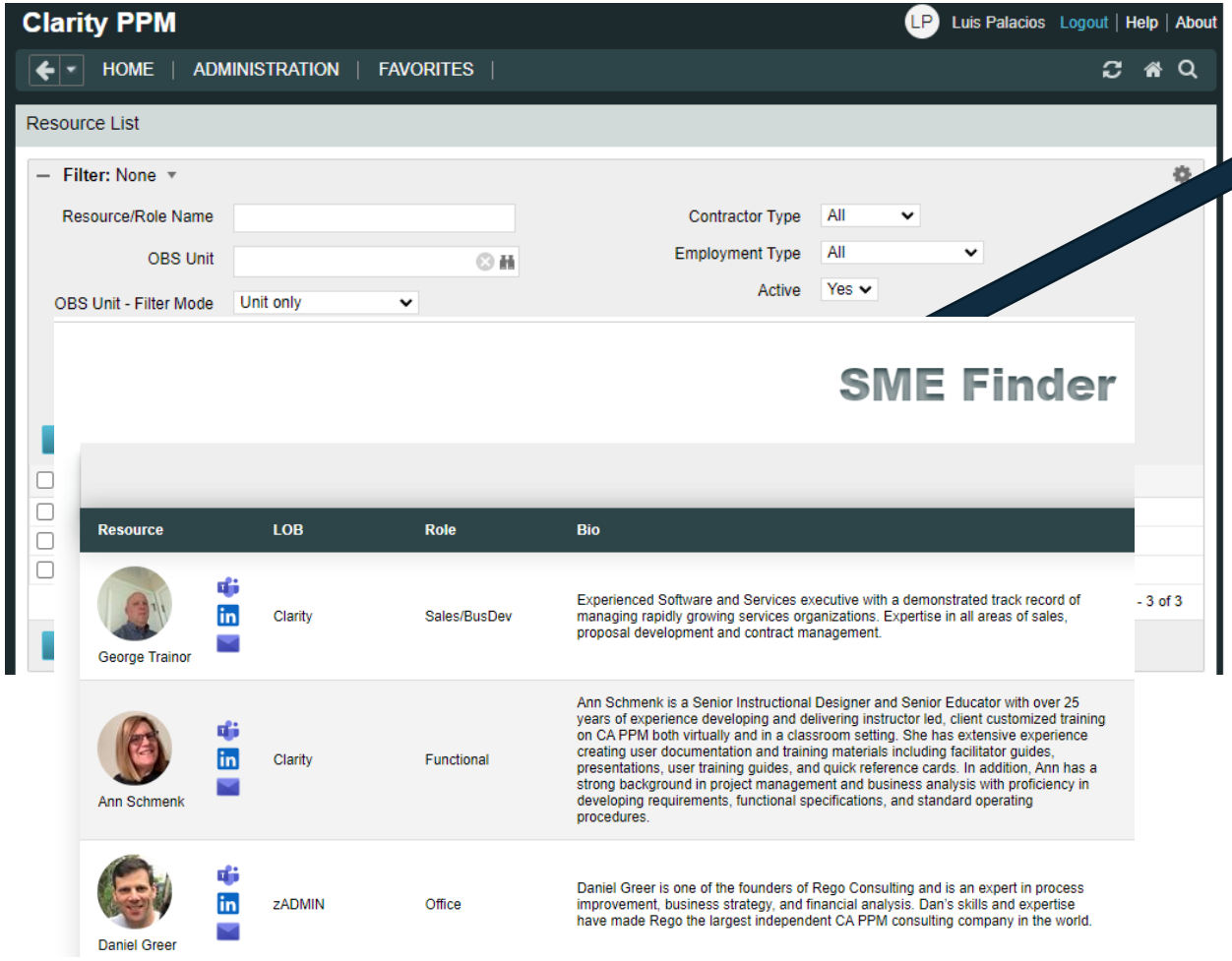
Outlook calendar synchronization

- From Clarity PPM to Outlook
  - Milestone Dates
  - Tasks
  - Target Dates like Risks, Issues, Change Requests
- From Outlook to Clarity PPM
  - Out of Office Dates to Resource Calendars
  - Extend Tasks or Project Dates



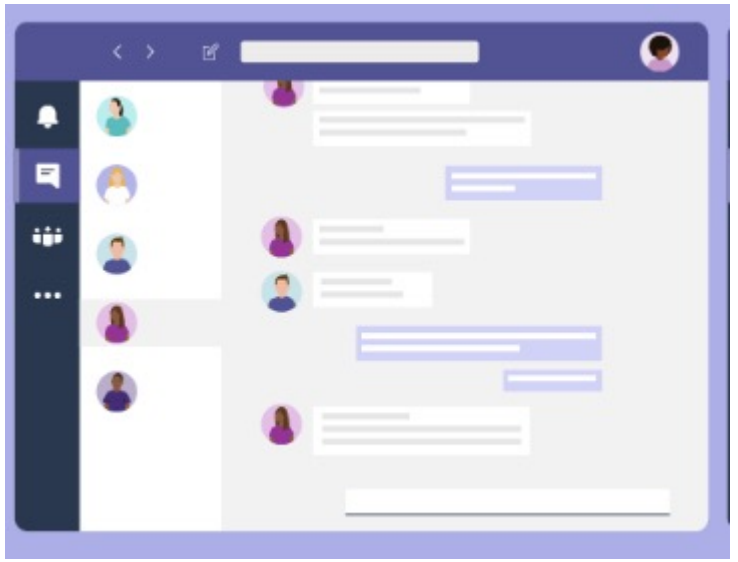


Azure Resource Interface / MS365 Directory Sync



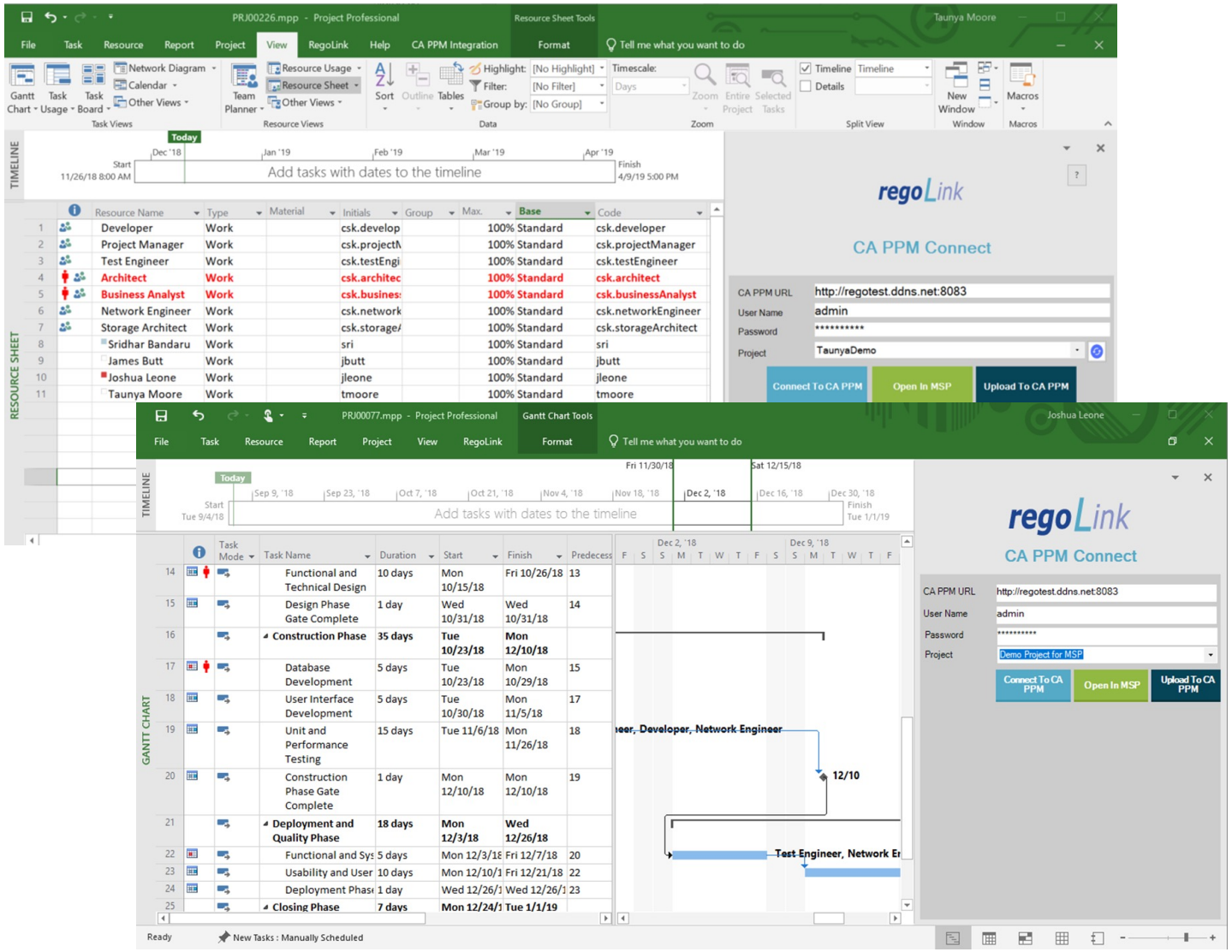
Meet your co-workers

Seamlessly start a conversation in MS Teams



Enhanced Microsoft Project

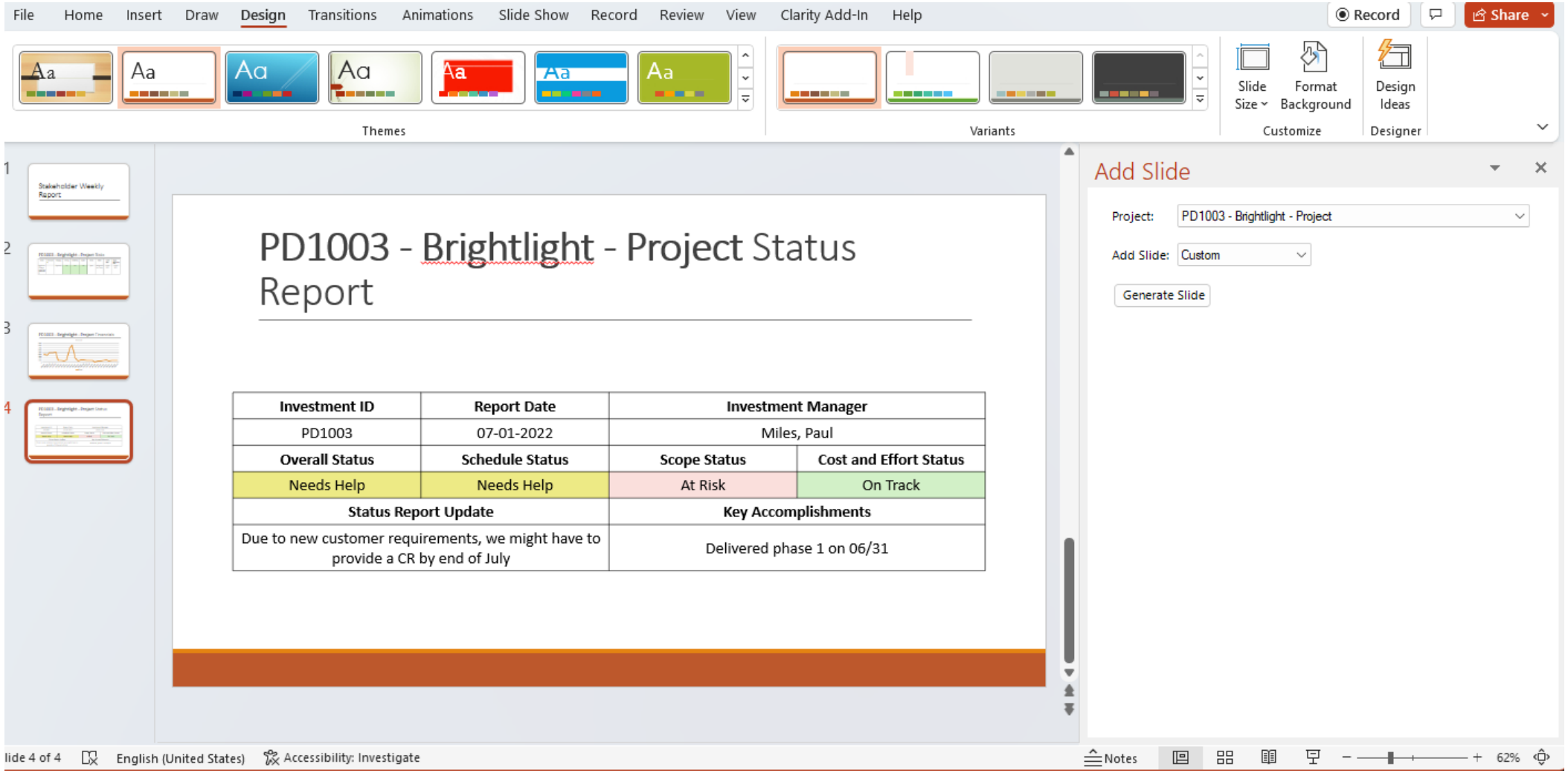
- Written from the ground up
  - Latest .NET technology used on the client side
- Optimized for fast saving to the CA PPM Server
  - Reduce payload size and server side validation
- Support for 2013 & 2016 Standard, Professional, and Click-to-Run versions
- Designed to be nimble; partial project export & import
- Features
  - Task Management
    - Phase, Tasks, Milestones
  - Dependencies
    - All types supported
  - Team & Resource Assignment Custom Field Support on task, team, & assignments
    - As defined in the OOTB MSP mapping object



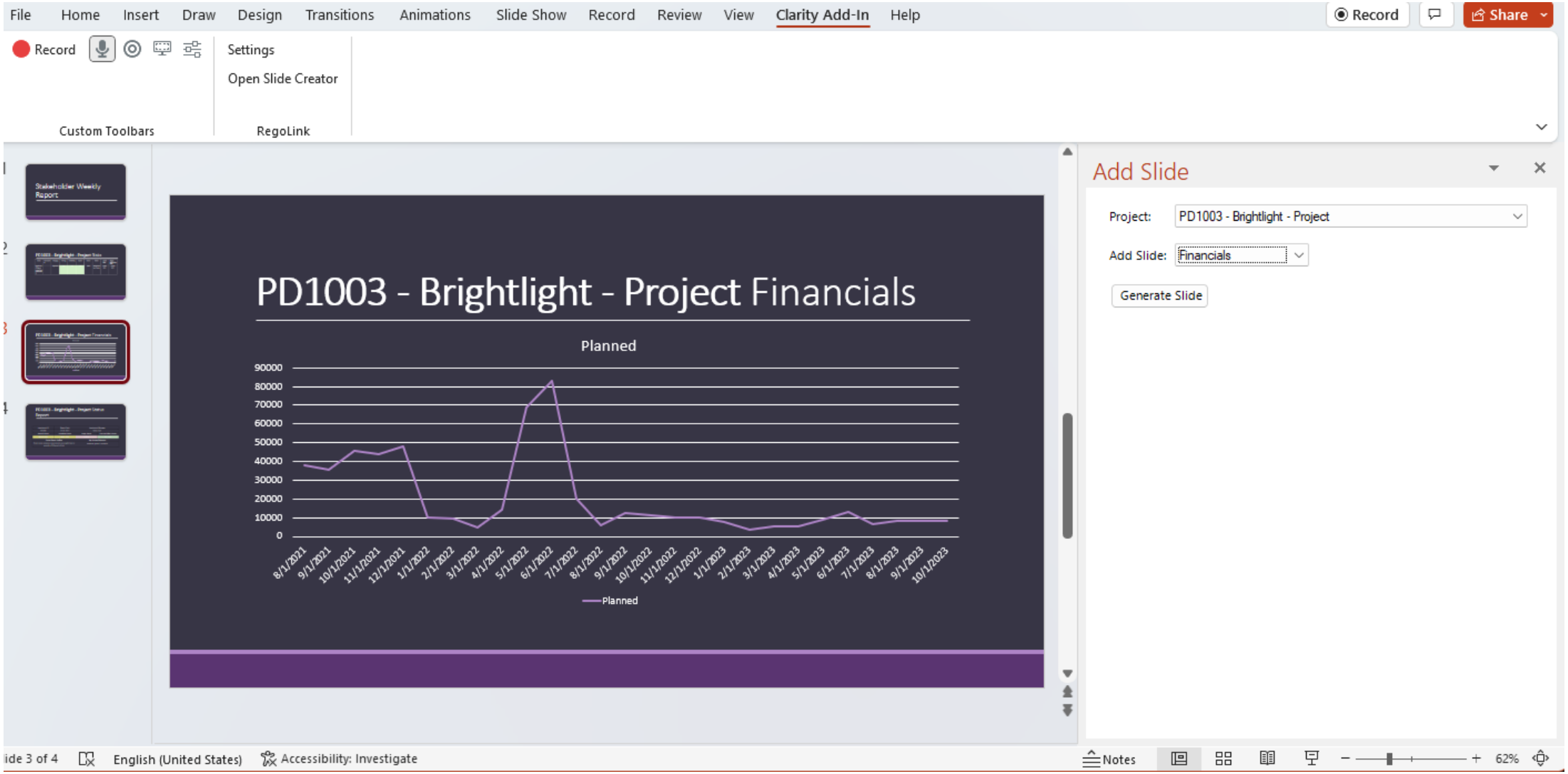
Rego's Power Point Add-In

- RegoLink Power Point Add-In seamlessly allows you to create slides based on your Clarity projects and data
- Easily login to your environment, pick the desired slide template and add to your presentation
- Relies on Clarity NSQL queries, easily convert existing portlets to slides or create new slide templates. It can support:
  - Tables
  - Line Charts
  - Custom defined slides
- It works seamlessly with Power Point themes and styles, inheriting based on your presentation

Rego's Power Point Add-In

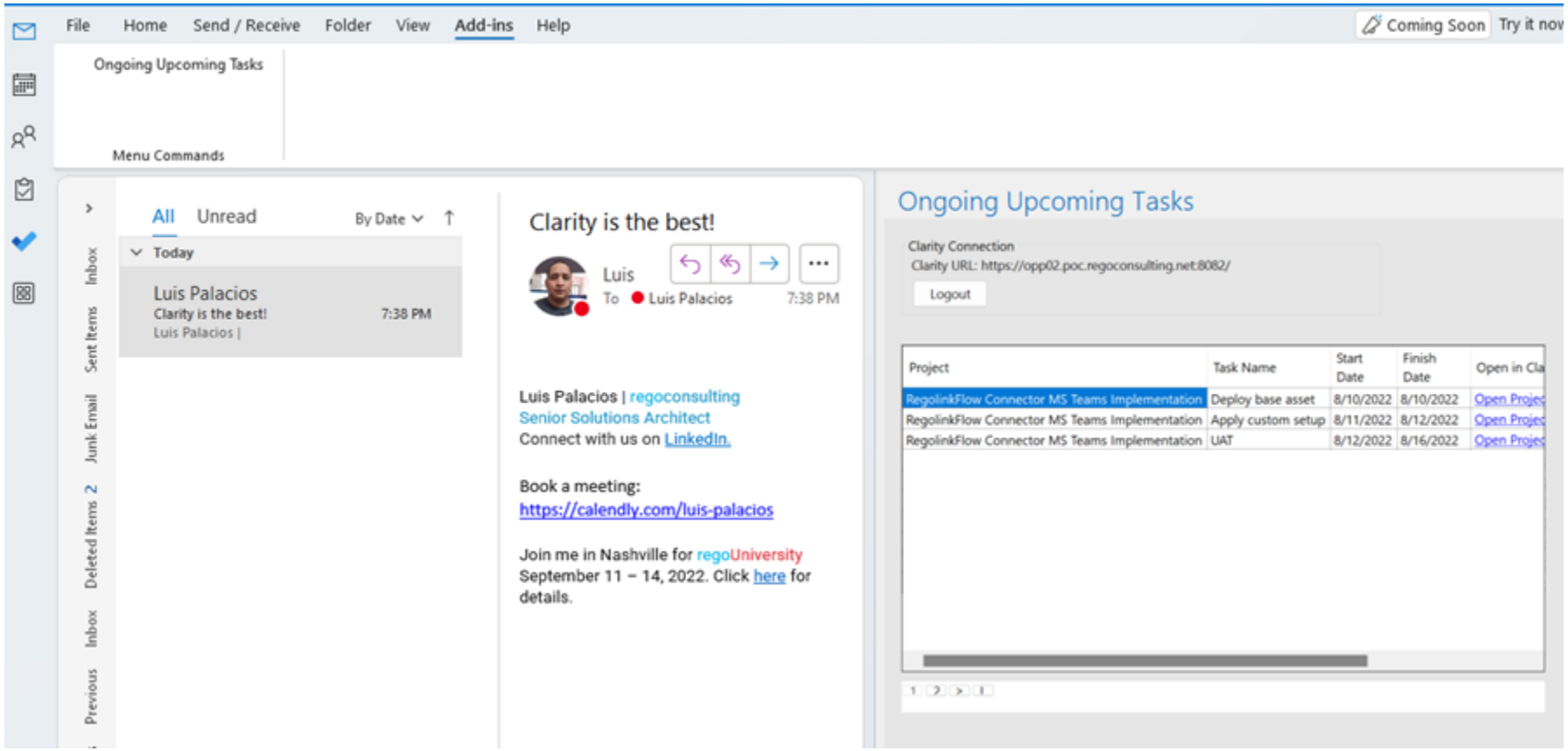


Rego's Power Point Add-In

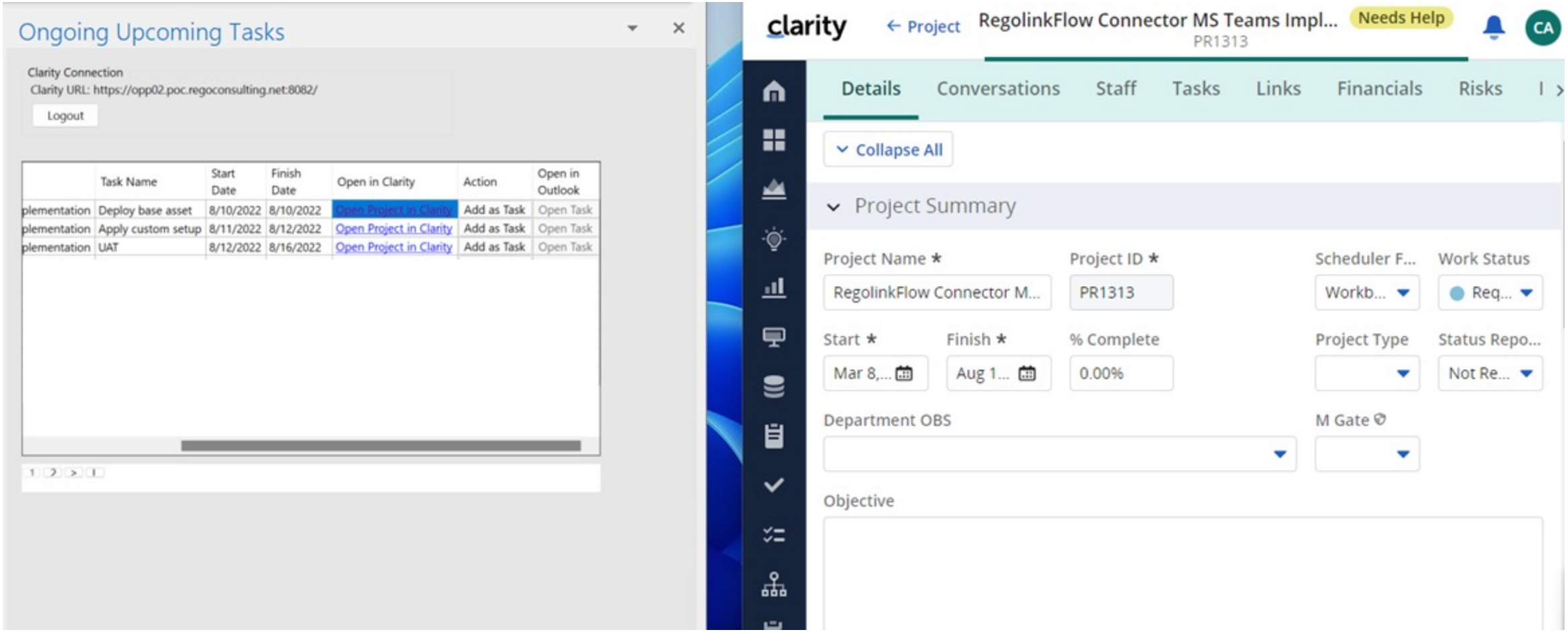


Rego's Outlook Add-In

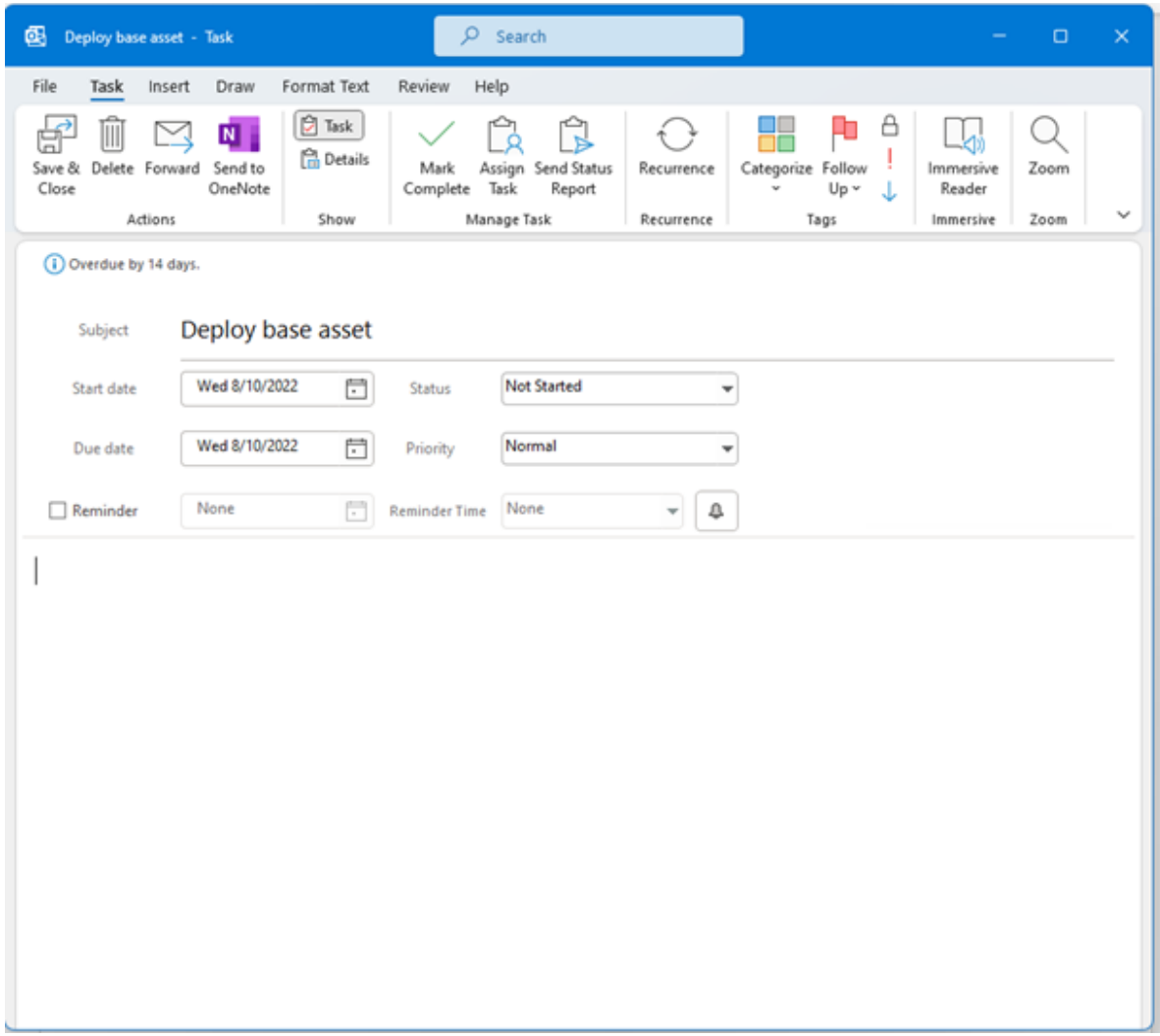
- **RegoLink Outlook Add-In lets you seamlessly interact with Clarity within Outlook's task pane. Allowing you to navigate your current workload**

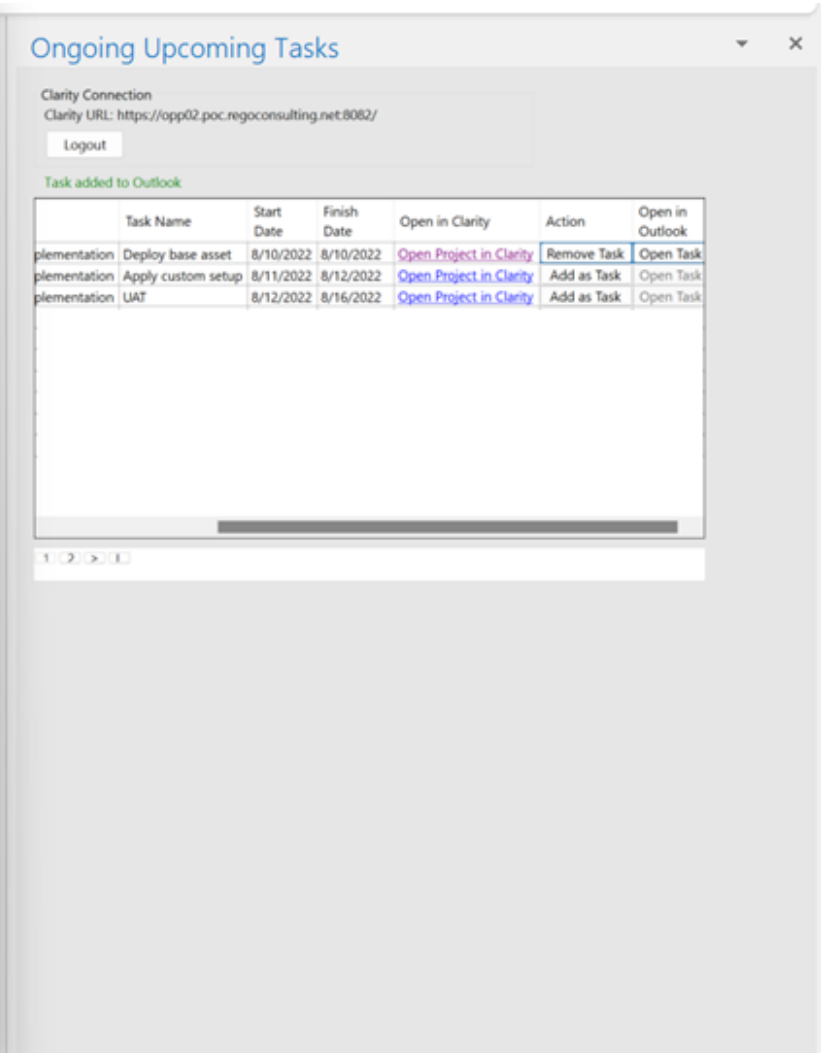


Easily Navigate to Clarity



Track your key tasks via Outlook Tasks





Rego Add-ons

Upcoming

Upcoming*

- Webhook support
- Roadmap auto-slotting
- Mobile
  - AIR 2.0
  - New methods of portfolio prioritization
  - Others...
- Predictive/Augmented intelligence
  - Assessing project risk based off past resource usage, staffing and baselines
  - Analyzing past status reports and RIDAC

* maybe, maybe not

Questions?

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 Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- 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.

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