



regoUniversity

NASHVILLE • 2022

**RegoXchange + AIR + EDM
+ Office 365**

Your Guides:

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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
   	      	 	   	       

regoLink

integrations for Clarity

Agile Integrations



HR/Resource/Financial



Reporting and Business Intelligence



Rego Add-ons

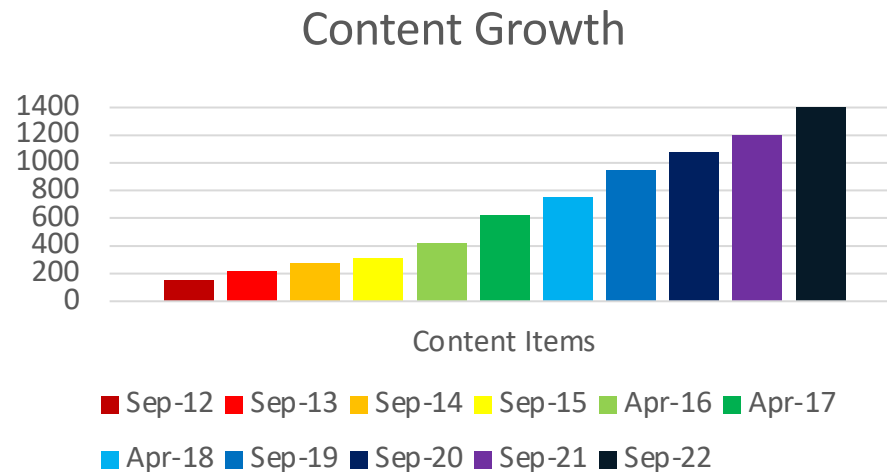
- All inbound connectors have the same base foundation
- Excel Data Manager
- Action Item Responder
- Office 365
 - SharePoint/MS Teams and Collaboration
 - Outlook Calendar Sync
 - Microsoft Project
- Scheduler Connectors
 - Microsoft Project Smartsheet
- Office 365 – Outlook and PPT Plugins

The future...

- Mobile
- Augmented Intelligence

regoXchange: 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

The screenshot displays a navigation menu with three main sections:

- Work Categories:** A row of 11 icons with labels: Application Management, Clarity Support, Demand, Financial Management, My Work Management, Portfolio Management, Product Management, Project Management, Quality Management, Resource Management, and Time.
- Work Types:** A row of 8 icons with labels: Configurations & Apps, Portlet, Presentation, Reports, Tech Track, Training Docs, Training Video, and Work Flow.
- Keyword:** A search bar with a "Search" button, a "Clear Filters" button, and a "Need Help? Ask the Rego Librarian" button.

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

Time by Assignment

Resource OBS:

Start Date: 3/1/2022

End Date: 7/31/2022

Charge Code: All

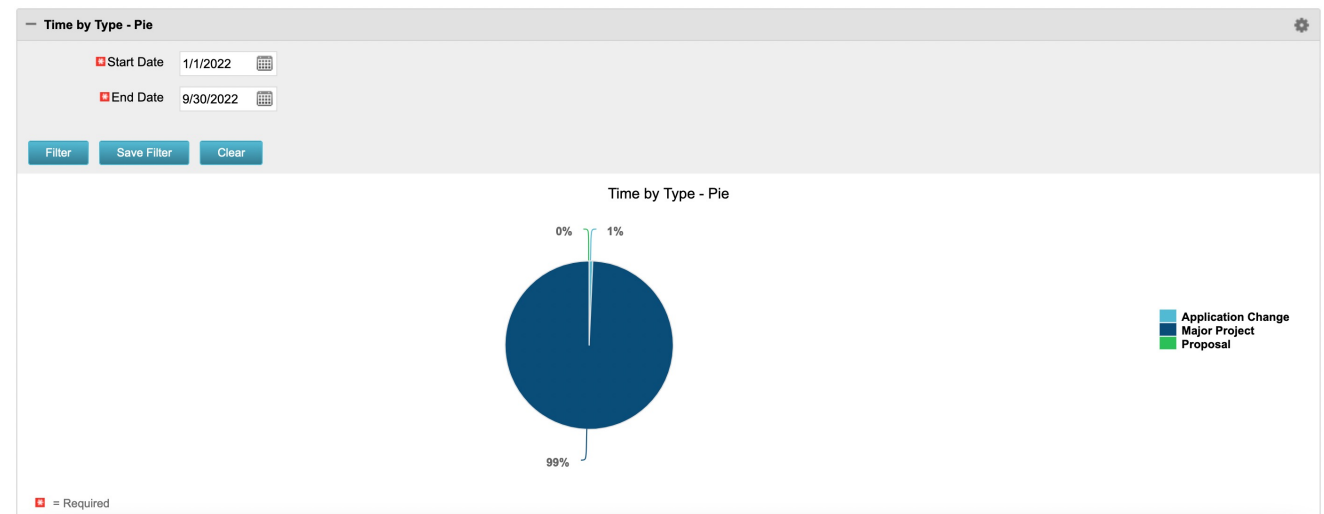
Timescale: Monthly

Investment:

Task Name:

Filter Save Filter Clear

Investment ID	Investment Name	Task Name	Charge Code	Assignend Resource	Proposed ETC	Pending Actuals	Notes	2022-03-01		2022-04-01		2022-05-01		2022-06-01		2022-07-01		Total Actuals	Total ETC
								Actuals	ETCs	Actuals	ETCs	Actuals	ETCs	Actuals	ETCs	Actuals	ETCs		
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

Milestone Task Dependency

Project(s) Milestone Name

Project ID Project Active? All

Project Name

Filter Show All Save Filter Clear

Project ID	Project Name	Milestone Name	Dependency Count	Current Milestone Date	Earliest Dependency Date	Date Lag
PRJ0095	Test Project I	MS1	3	4/30/14	10/31/12	
PRJ0095	Test Project I	MS2	1			
PRJ0140	Build a Software Solution	Charter Approved	1			
PRJ0140	Build a Software Solution	Project Complete	1			
PRJ0144	Open super market	Plan approved	1			
PRJ0144	Open super market	Design approved	1			

Milestone Task Dependency Details

Project ID	Project Name	Milestone Name	Milestone Start	Milestone Finish	Predecessor Task Name
PRJ0095	Test Project I	MS1	4/30/14	4/30/14	Big Bang Theory Superhero Contest
PRJ0095	Test Project I	MS1	4/30/14	4/30/14	Task 2 from OWB
PRJ0095	Test Project I	MS1	4/30/14	4/30/14	Analysis of Test Runs

Allocation Compliance Pie Chart

Start Date: 4/1/2016 End Date: 6/30/2016

Filter Save Filter Clear

A: Under Allocated (Less Than 80%)
 B: Appropriately Allocated (Between 80-120%)
 C: Over Allocated (Over 120%)

Allocation Compliance List

Resource Name	Resource Manager	Availability	Allocated	Allocation %
Armstrong, Ken	Joshi, Navdeep	704	704.00	
Brewster, Leanne	Hackney, Ron	704	704.00	
Cronin, Ellen	Dolak, Jerry	704	704.00	
Gallinger, Brian	Administrator, Niku	704	704.00	
Garrick, Jay	Administrator, Niku	704	712.87	
Holt, Allen	Hackney, Ron	704	637.20	
Ironman, Irony	Kent, Clark	704	704.00	
Murry, Chris	Hackney, Ron	704	704.00	
Obrien, Allison	Hackney, Ron	704	704.00	
Sam, Uncle	West, Wally	704	716.00	101.7
Test, Resource 1	Wuenstel, Chris	704	704.00	100.0
Trainer, Pat	Hackney, Ron	704	704.00	100.0
Total Availability and Allocation & Average %		8,448	8,402.07	99.5

Projects by Indicator Pie

OBS Manager

Filter Show All Save Filter Clear

Projects by Indicator Pie

On Track
 At Risk
 Critical
 No Status

Projects By Indicator

Projects by Indicator Drill

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

Displaying 1 - 6 of 6

New Portlets – 2022

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

Resource Team Allocation

Start Date: 6/1/2022
 End Date: 10/31/2022
 Resource OBS: Organization OBS:Organizat
 Resource OBS Mode: Unit and descendants
 Active: All
 Open For Time Entry: All
 Project(s):

Resource Manager:
 Resource(s):
 Team:

Filter Save Filter Clear

Resource	Team	Project	Resource to Team Allocation %	Resource to Project Allocation %	Total Allocation %	Remaining Capacity	Over / Under
Account Manager		Build a Software Solution	0%		0.00%	100.00%	Under
Account Manager		XYZ Commercial Properties	0%		0.00%	100.00%	Under
Administrator, Niku		XYZ Commercial Properties	0%		0.00%	100.00%	Under
Alfred, Al		ABC E-Commerce Delivery	0%		0.00%	200.00%	(100.00%) Over
Alfred, Al		Save the World	0%	100.00%	200.00%	200.00%	(100.00%) Over

Process Run Metrics

Process Name:
 Start Date:
 End Date:

Filter Show All Save Filter Clear

Process Name	Process Code	Description	# Running	# Completed	# Errored	Last Ran
Project Survey Instance Lock	rego_survey_lock	Process locks the survey record after it is submitted as complete.	0	12	0	5/4/16 4:09 PM
DWH Process	rego_dwh_process		0	0	1	2/4/16 10:08 AM
Excel From Query and Email	rego_excel_from_qry_and_email		0	0	0	12/31/15 5:01 PM
Project Survey Distribution	rego_prj_survey_dist	Creates Project Closure Survey instances for each survey participant selected by the PM.	0	6	0	5/4/16 3:55 PM
Project Closure Survey Notification	rego_ll_svy_notify		0	4	0	5/4/16 3:55 PM
Reset User and Resource Email	son_res_user_email	Run this process only in DEV!!!! This will reset the email address to an invalid email to avoid email notifications from non-PROD environment.	0	1	0	9/8/16 11:22 AM
Add Form Users to Collaboration	cu_add_users_to_collab	Process will check new users added to forms and set them as participant in collaboration and add project view and form edit rights.	0	1	0	10/10/16 3:23 PM
Rego - Convert Idea to Project	rego_convert_idea_prj	Converts the Idea to a Project. Will transfer the Idea Values from the Idea directly to a project and copy the Team over to the Project. If a Template is selected it will copy the Templates Tasks to the Project.	0	9	0	4/5/17 10:03 PM

Revenue Forecast

OBS: Organization OBS:Organizat
 Status: Approved
 Closure Probability: to
 Month:

Filter Show All Save Filter Clear

			2025-04		2024-10		2023-10		2022-12		2022-11		2022-09		
	Engagement	Status	Closure Probability	Hours	Revenue	Hours	Revenue	Hours	Revenue	Hours	Revenue	Hours	Revenue	Hours	Revenue
✓	DW	Approved		880	0	920	0	880	0	880	0	880	0	880	0
✓	Save the World	Approved								295.170791	22,137.809325	295.170791	22,137.809325	295.170791	22,137.809325
✓	Search for the Riddler	Approved								79.2	5,940	79.2	5,940	79.2	5,940
✓	Big Bang Theory Superhero Contest	Approved								406.272604	28,947.3684	406.272604	28,947.3684	405.964912	28,947.3684
✓	Build a Software Solution	Approved								1,408	105,600	1,408	105,600	1,408	105,600

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

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](mailto:sayantana.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	1	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

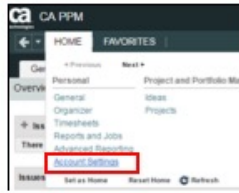
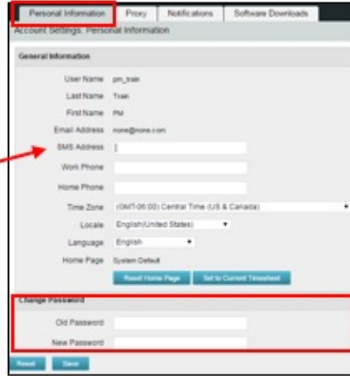
- Advanced Clarity Administration
- Advanced Data Model Training
- Crystal Reports Development
- Intro to Clarity Application Administration
- Introduction to Clarity Financials
- Introduction to Clarity Open Workbench
- Jaspersoft Development
- Managing Portfolios with Clarity
- Managing Projects with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

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

Anesthesia Delivery (PJM Training Class)

Select OBS Type: Corporate Department OBS

Select OBS: Product Development | NPN

Select Project: 2015 eCommerce Portal Proposal, 2015 Infrastructure Improvements, 2015 Lean Six Sigma Project, 2015 Mobile Advertising, 2015 New Product Development, 2015 Restructure Architecture virtual..., 2015 Security Compliance, 2015 Spring Franchise Manager Rel..., 4G Upgrade Readiness

Select RIC Status: Open

Overall Status:

Latest Status Report:

Overall Status Trend:

Effort Variance: 40.17K

Schedule Variance: 0

Change Request:

Adams, Benjamin

TASK_NAME	ASSIGNMENT...	START_DATE	FINISH_DATE
Barney Enhancements (PJM Train...	Not Started	01-Jan-15	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 (PJM Training Class)	Not Started	01-Oct-15	31-Dec-19
Cloud Pathfinder (PJM Training C...	Not Started	01-Jan-16	29-Dec-17
Iron Innovator (PJM Training Class)	Not Started	01-Jan-16	01-Jun-18

Task Performance:

Timesheet Performance:

Actuals by Type:

Allocation by Type:

Late Milestones

OBS Type: Corporate Department OBS

Investment Manager: All

Investment Name: All

Investment ID	Investment Name	Milestone Name	Investment Manager	Status	Start Date	Finish Date	Days Off	Days Late
PR51000	A Fantastic Project (PJM Tr...	Analyze Phase Complete	Flanagan, Christopher	Not Started	Monday, April 20, 2015	Friday, May 8, 2015	819	18
PD1012	Atropia Retina Scan - Proje...	Business Case Complete and Go to Development	Miles, Paul	Not Started	Monday, April 13, 2015	Monday, April 13, 2015	844	843
PD1002	Aurascopy XA - Project	Business Case Complete and Go to Development	Miles, Paul	Not Started	Monday, August 10, 2015	Monday, August 10, 2015	725	724
PD1003	Brightlight 3000 - Project	Business Case Complete and Go to Development	Miles, Paul	Not Started	Friday, October 9, 2015	Friday, October 9, 2015	665	664
enwvca	Diagnostic ECG - Project	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Thursday, September 10, 2015	Thursday, September 10, 2015	694	693
Echo Cardiology 3000 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Thursday, September 10, 2015	Thursday, September 10, 2015	694	693	
Fluorescope Imaging 1000 ...	Business Case Complete and Go to Development	Miles, Paul	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723	
Magnifica 4000 - Project	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723	
Molecular Imaging 4000 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723	
Molecular Imaging 6000 - ...	Business Case Complete and Go to Development	Nunez, Angie	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723	
MPI 3000 - Project	Business Case Complete and Go to Development	Terryson, Peter	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723	
Nuclear Cardiology 2200 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723	
PET A+ - Project	Business Case Complete and Go to Development	Craig, Allen	Not Started	Tuesday, June 9, 2015	Tuesday, June 9, 2015	787	786	
Sonaxy XT - Project	Business Case Complete and Go to Development	Miles, Paul	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723	
Ultrasound V4000 - Project	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723	
Vividium 2000 - Project	Business Case Complete and Go to Development	Craig, Allen	Not Started	Monday, November 9, 2015	Monday, November 9, 2015	634	633	
2015 eCommerce Portal Pr...	Closing Phase Gate Complete	Arya, Vishal	Not Started	Friday, February 19, 2016	Friday, February 19, 2016	531	531	
4G Upgrade Readiness	Closing Phase Gate Complete	Reed, Henry	Not Started	Thursday, September 15, 2015	Thursday, September 15, 2015	689	688	
Automated Security Enhanc...	Closing Phase Gate Complete	Berks, Paul	Not Started	Thursday, September 17, 2015	Thursday, September 17, 2015	687	686	

All Risks

Target Resolution Date: 10/10/2015 to 4/24/2017

OBS Type: Business Transformation Group

OBS Path: Corporate Department OBS

Risk Count: 11

Risk by Priority:

Risk by Status:

Risk by Target Resolution Date:

Investment ID	Investment Name	Risk Name	Investment Manager	Risk ID	Owner	Status	Priority	Target Resolution Date
PN1011	Anesthesia Delivery (PJM Training Class)	Test Risk Objectives	Terryson, 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 frozen 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	Hoaldridge, Jon	RS1082	Hoaldridge, Jon	Open	High	Thursday, February 11, 2016
PR1083	JH Project-Financial Mgmt Overview	Risk 2	Hoaldridge, Jon	RS1083	Hoaldridge, Jon	Closed	Low	Thursday, February 11, 2016
PR1114	Bigfish Automation (PJM Training Class)	may run over allocated budget	Scarlato, Jennifer	RS1084	Calderson, 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 (PJM Training Class)	High Risk Sample	Flanagan, Christopher	RS1080	Administrator, System	Open	High	Tuesday, November 10, 2015
PR51000	A Fantastic Project (PJM Training Class)	Low Risk Sample	Flanagan, Christopher	RS1078	Administrator, System	Open	Low	Tuesday, November 10, 2015

Issues

Issues: 5, Risks: 11, Demands: 110

Actuals by Type:

Allocation by Type:

Investment ID	Issue ID	Issue Name	Target Resolution Date	Probability	Priority
PR1052	IS1089	Requirements to be frozen 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	aspodgajgdj	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 frozen on time	13-Oct-15	Medium	High
PR1052	RS1075	Resource availability	13-Oct-15	High	Medi
PN1011	RS1077	Test Risk Objectives	23-Oct-15	High	Medi
PR51000	RS1078	Low Risk Sample	10-Nov-15	Low	Low
PR51000	RS1079	Medium Risk Sample	10-Nov-15	Medium	Medi
PR51000	RS1080	High Risk Sample	10-Nov-15	High	High
PR1083	RS1082	Risk 1	11-Feb-16	Medium	High

Issues

Issue Count: 4

Risk by Priority:

Risk by Status:

Risk by Target Resolution Date:

Investment Name	Issue Name	Investment Manager	Issue ID	Owner	Target Resolution Date	Status	Priority
KL OWB Project 1234	aspodgajgdj	Lockwood, Karl	IS1092	Lockwood, Karl	Wednesday, April 27, 2016	WIP	Low
CLR Demo Project	new issue from the risk	Rice, Christi	IS1094	Rice, Christi	Monday, April 24, 2017	Open	Medium
JH Project-Financial Mgmt Overview	Risk 1 to Issue 1	Hoaldridge, Jon	IS1091	Hoaldridge, Jon	Thursday, February 11, 2016	WIP	High
Anesthesia Delivery (PJM Training Class)	Test Issue Objectives from Risk	Terryson, Peter	IS1090	Joshi, Navdeep	Friday, October 23, 2015	Open	Low

PowerBI Dashboards

Resource Manager Dashboard
Resource Manager
Garvey, Sara

Resource	Role	Employment Type	Vendor
Avery, Hannah	Developer - Senior	Employee	
Bolin, Rod	DBA	Contractor	Great Vendor - 2
Campbell, Reed	Business Analyst	Employee	
Garvey, Sara	Project Manager	Employee	
Hensel, Ross	Developer - Junior	Employee	
Marsh, Braden	Storage Architect	Employee	
Reese, Dylan	Test Engineer	Employee	
Scarlato, Jen	Architect	Employee	

Allocation by Investment Type

Actuals this Month: 16.00

% Time Compliance

1.63%

Open Timesheets: 2

Missing Timesheets: 179

Submitted Timesheets: 1

Approved/Posted Timesheets: 2

Total Timesheets: 184

Timesheet Count by Organization and Timesheet Status

RESOURCE_MANAGER	Compliance %	# Resources
Springer, Jody	0%	1
Joshi, Navdeep	0%	2
Garvey, Sara	5%	8
Engel, Heidi	0%	2
Bonham, Jessica	0%	5

Demand by Month

Timesheet Count by Employment Type and Timesheet Status

Project Manager: Zywiec, David

Project Overall Status

This is an awesome project	Yellow
Hire New Sales Staff	Yellow
Creating a Power BI Project	Yellow
2017 New Product Development	Yellow

Spend and Budget by Year

Goal: Budget for this Month

Project Map by Estimated Time Left

Project	Spend to Date	% Spend	Budget
Creating a Power BI Project	2,400.00		10,000.00
Hire New Sales Staff	0.00		57,150.00
This is an awesome project	0.00		68,000.00
2017 New Product	0.00		1,288,245.75
Total	2,400.00	24.00	1,423,395.75

Effort Variance

Hours: 0.00

Schedule Variance

Days Late: 0.00

Actual Hours, Allocated Hours and ETC Hours by Fiscal Month

Resource	Role	Actuals	ETCS	Pending Actuals
Test Engineer	Test Engineer	0.00	8.00	0.00
Storage Architect	Storage Architect	0.00	3,664.00	0.00
Sciuto, Abby	Network Engineer	75.00	1,581.00	0.00
Project Manager	Project Manager	0.00	3,928.00	0.00
McGee, Timothy	Developer - Senior	45.00	2,424.50	0.00
Mallard, Donald	Business Analyst	45.00	1,728.50	0.00
Gibbs, Leroy Jethro	Project Manager	45.00	2,688.50	0.00
Fair, Jan	Business Analyst	80.00	220.00	0.00
DiNozzo, Anthony	Developer - Senior	60.00	2,553.50	0.00
Total		390.00	22,032.00	0.00

Total Tasks: 40

Over Due: 28

% Critical: (Blank)

Unfilled Roles: 13

Over Due Tasks this Month

Project	Task	Finish
Hire New Sales Staff	Closing Phase	4/5/2018
Hire New Sales Staff	Closing Phase Gate Complete	4/5/2018
Hire New Sales Staff	Lessons Learned	4/6/2018
Hire New Sales Staff	Usability and User Acceptance Testing	4/2/2018

Let Rego be your guide.

regoUniversity2022

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

Clarity PPM					
Personal	Portfolio Management	Strategic Alignment	Organization	External Value Management	IT Service Management
General	Estimate Details	Strategic Review	Departments	Agencies	Services
Organizer	Portfolio	Strategic Items	Knowledge Store	Contracts	
Dashboards	Programs	Strategic Indicators	Project Idea	Control Accounts	
Portlets	Projects	Strategic Perspectives	XOS page		
Advanced Reporting	Applications	Alignment Metrics			
Account Settings	Assets	Evaluation Cycles			
Reports and Jobs	Products	Strategic Evaluations			
Timecharts	Other Work				
Link to New User Experience					
New Product Development					
Gate Scoring	Release Planning	Ideas	Resources	Transaction Entry	Portfolio Dashboard
Executive Dashboard	Releases	Incidents	Resource Planning	Post to WIP	Status Report Review
Stage Review	Requirements		Capacity Overview	Create WIP Adjustment	PPM Dashboards
Idea Management Dashboard			Resource Finder	Approve WIP Adjustment	SP - Portfolio View
Portfolio Management Dashboard			Resource Requisitions	Transactions	Training Portlet Session
Portfolio/Executive Dashboard			Allocation Editor	Assignments	Assignment Metrics
			Timesheet Overview	Work Request Portlets	PPM Request Dashboard
			Capacity by Role and Skill	Contracts	Service Request Dashboard
			Capacity by Skill		Incident Dashboard
					Product Roadmap
					Application Dashboard
					Assessment Review
					Link to Modern UX Timecharts

Rego New Phoenix UI Menu

Clarity PPM						
Personal	Portfolio Management	Strategic Alignment	Organization	External Value Management	IT Service Management	New Product Development
General	Estimate Details	Strategic Review	Departments	Agencies	Services	Gate Scoring
Organizer	Portfolio	Strategic Items	Knowledge Store	Contracts		Executive Dashboard
Dashboards	Programs	Strategic Indicators	Project Idea	Control Accounts		Stage Review
Portlets	Projects	Strategic Perspectives	XOS page			Idea Management Dashboard
Advanced Reporting	Applications	Alignment Metrics				Portfolio Management Dashboard
Account Settings	Assets	Evaluation Cycles				Portfolio/Executive Dashboard
Reports and Jobs	Products	Strategic Evaluations				
Timecharts	Other Work					
Link to New User Experience						
Requirements Planning						General Objects
Release Planning	Ideas	Resources	Transaction Entry	Portfolio Dashboard	Lookup Mapping	
Releases	Incidents	Resource Planning	Post to WIP	Status Report Review	ADR to Lookup Mapping	
Requirements		Capacity Overview	Create WIP Adjustment	PPM Dashboards	FAQ List	
		Resource Finder	Approve WIP Adjustment	SP - Portfolio View	PI Attachments	
		Resource Requisitions	Transactions	Training Portlet Session	Studio Test List	
		Allocation Editor	Assignments	Adoption Metrics	Timechart Staging List	
		Timesheet Overview	Work Request Portlets	PPM Request Dashboard	BC Hours Log List	
		Capacity by Role and Skill	Contracts	Incident Dashboard	HR Hours Log List	
		Capacity by Skill		Product Roadmap	DAF Hours Log List	
				Application Dashboard	HR Hours Log List	
				Assessment Review	Strategic View Log List	
				Link to Modern UX Timecharts	Strategic View Log List	
					HRM - Role List	
					Strategic Risk and Issue Category List	
					Element Objects List	
					Customer Object List	
					Child - object List	
					Group Objective List	
					PI Lessons List	

OOTB Phoenix UI – Project List Filter

Clarity PPM					
Projects					
Filter: System Default					
PROJECT NAME		MANAGER			
PROJECT ID		STAGE			
OBS UNIT		SCHEDULER	All		
OBS UNIT - FILTER MODE	Unit only	APPROVED STATUS	All		
PROJECT TYPE	All	TEMPLATE	No		
PROJECT CATEGORY	All	ACTIVE	Yes		
		POWER FILTER	[Build Power Filter]		
<input type="button" value="FILTER"/> <input type="button" value="SHOW ALL"/> <input type="button" value="SAVE FILTER"/> <input type="button" value="CLEAR"/>					
<input type="checkbox"/>	Project	Red Flag	Stage	Stage Review	Product Category
				Risk Status	Planned Cost
				Schedule	Project Status Summary Report
				Feb 20	Mar 20
				Apr 20	May 20
				Jun 20	Jul 20
				Blueprint	Product Type
				Product Line	

Rego New Phoenix UI - Project List Filter

Clarity PPM					
Projects					
Filter: System Default					
PROJECT NAME		MANAGER			
PROJECT ID		STAGE			
OBS UNIT		SCHEDULER	All		
OBS UNIT - FILTER MODE	Unit only	APPROVED STATUS	All		
PROJECT TYPE	All	TEMPLATE	No		
PROJECT CATEGORY	All	ACTIVE	Yes		
		POWER FILTER	[Build Power Filter]		
<input type="button" value="FILTER"/> <input type="button" value="SHOW ALL"/> <input type="button" value="SAVE FILTER"/> <input type="button" value="CLEAR"/>					
<input type="checkbox"/>	Project	Red Flag	Stage	Stage Review	Product Category
				Risk Status	Planned Cost
				Schedule	Project Status Summary Report
				Feb 20	Mar 20
				Apr 20	May 20
				Jun 20	Jul 20
				Blueprint	Product Type
				Product Line	

Rego AddOns

Excel Data Manager



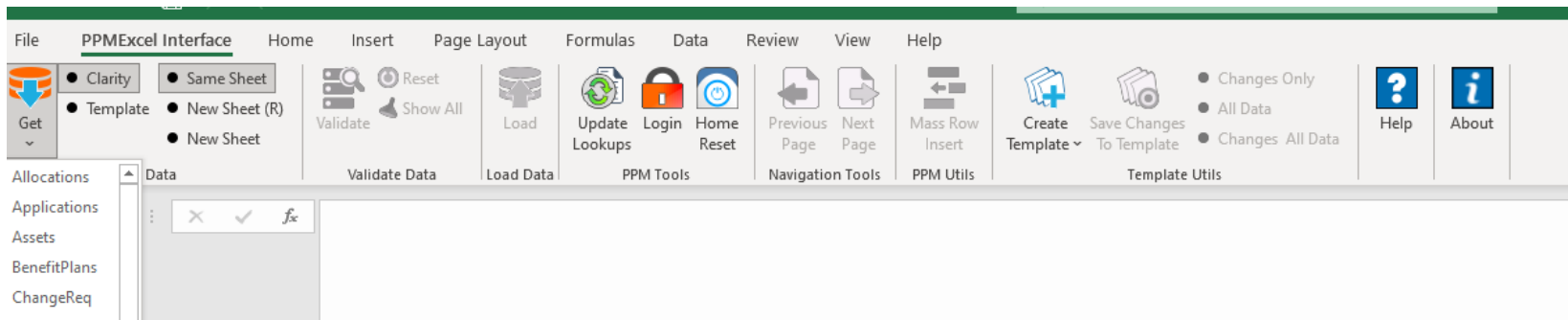
Excel Data Manager

- 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

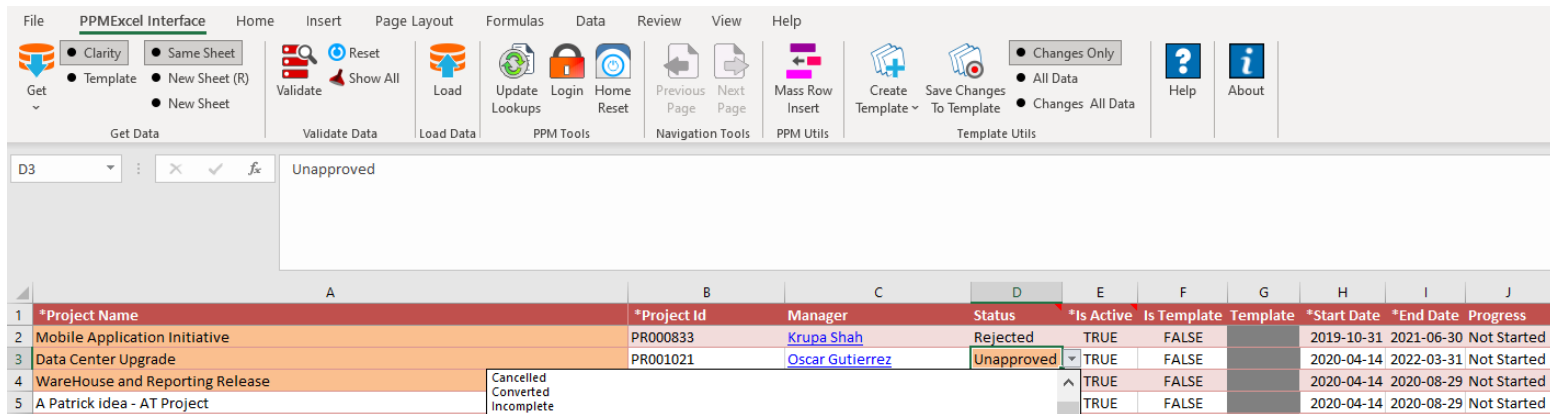
- Extract Data
 - Using one of the 25 samples provided by Rego
 - Custom Interfaces built to match your environment
- Data is handled via XOG making it GCP, AWS and On Premise compatible
- Easy to use Excel Ribbon to interact with your environment. Allows you to select the data and filtering criteria

- 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

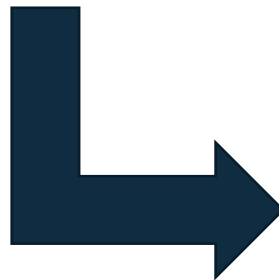
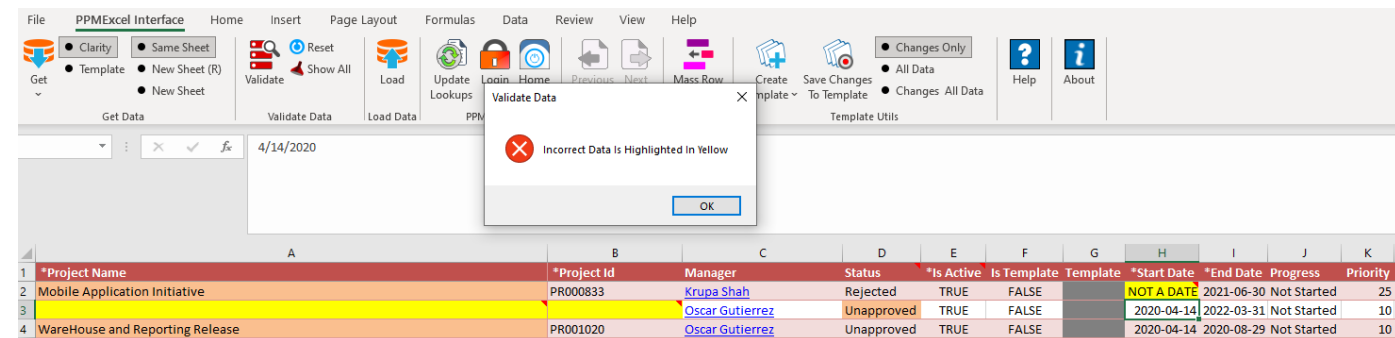


Load Data

- Modify Data via Excel functionality like formulas, copy/paste, 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.



*Project Name	*Project Id	Manager	Status	*Is Active	Is Template	Template	*Start Date	*End Date	Progress	Priority
Mobile Application Initiative	PR000833	Krupa Shah	Rejected	TRUE	FALSE		2019-10-31	2021-06-30	Not Started	
Data Center Upgrade	PR001021	Oscar Gutierrez	Unapproved	TRUE	FALSE		2020-04-14	2022-03-31	Not Started	
WareHouse and Reporting Release			Cancelled Converted Incomplete	TRUE	FALSE		2020-04-14	2020-08-29	Not Started	
A Patrick idea - AT Project				TRUE	FALSE		2020-04-14	2020-08-29	Not Started	

*Project Name	*Project Id	Manager	Status	*Is Active	Is Template	Template	*Start Date	*End Date	Progress	Priority
Mobile Application Initiative	PR000833	Krupa Shah	Rejected	TRUE	FALSE		NOT A DATE	2021-06-30	Not Started	25
Data Center Upgrade	PR001021	Oscar Gutierrez	Unapproved	TRUE	FALSE		2020-04-14	2022-03-31	Not Started	10
WareHouse and Reporting Release	PR001020	Oscar Gutierrez	Unapproved	TRUE	FALSE		2020-04-14	2020-08-29	Not Started	10

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



Approval/Rejection of a Change Request or Budget Revision



Ideation Validation and Conversion Approval



Stage Gate Reviews

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 Timesheet Submission

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 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 Budget Submission

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	\$500,000
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

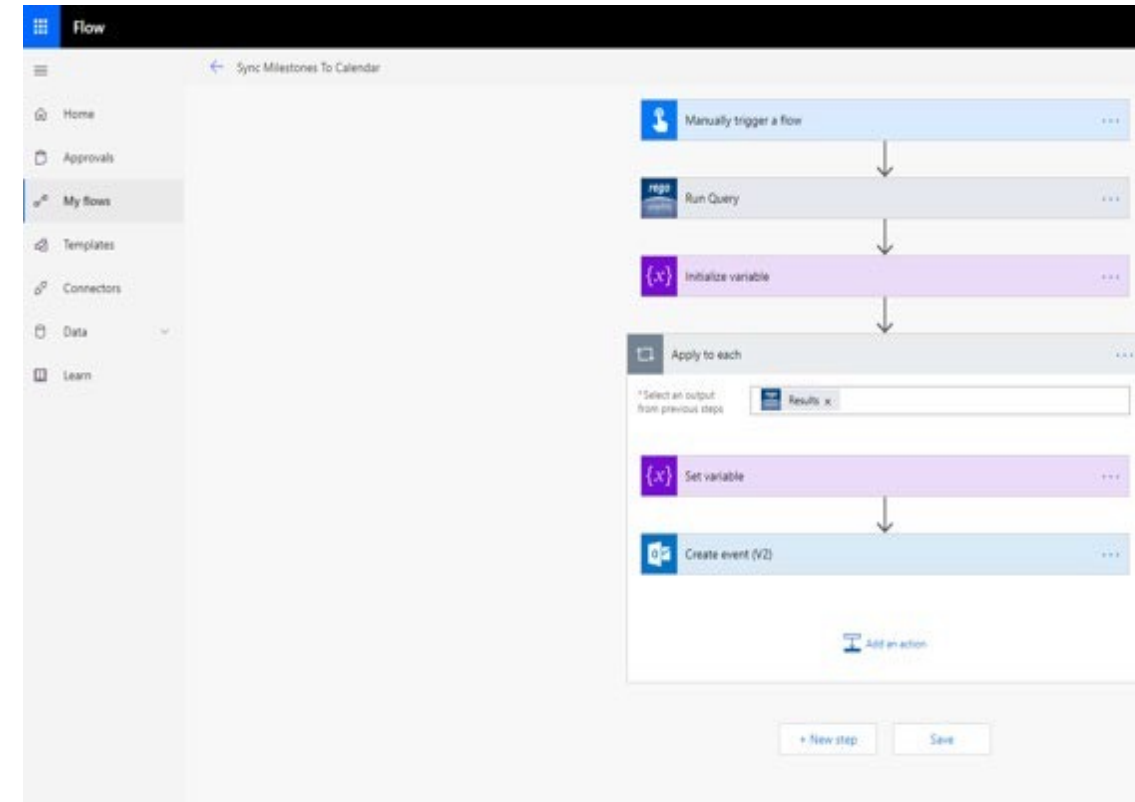


- **Using Microsoft Flows**

- 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:**

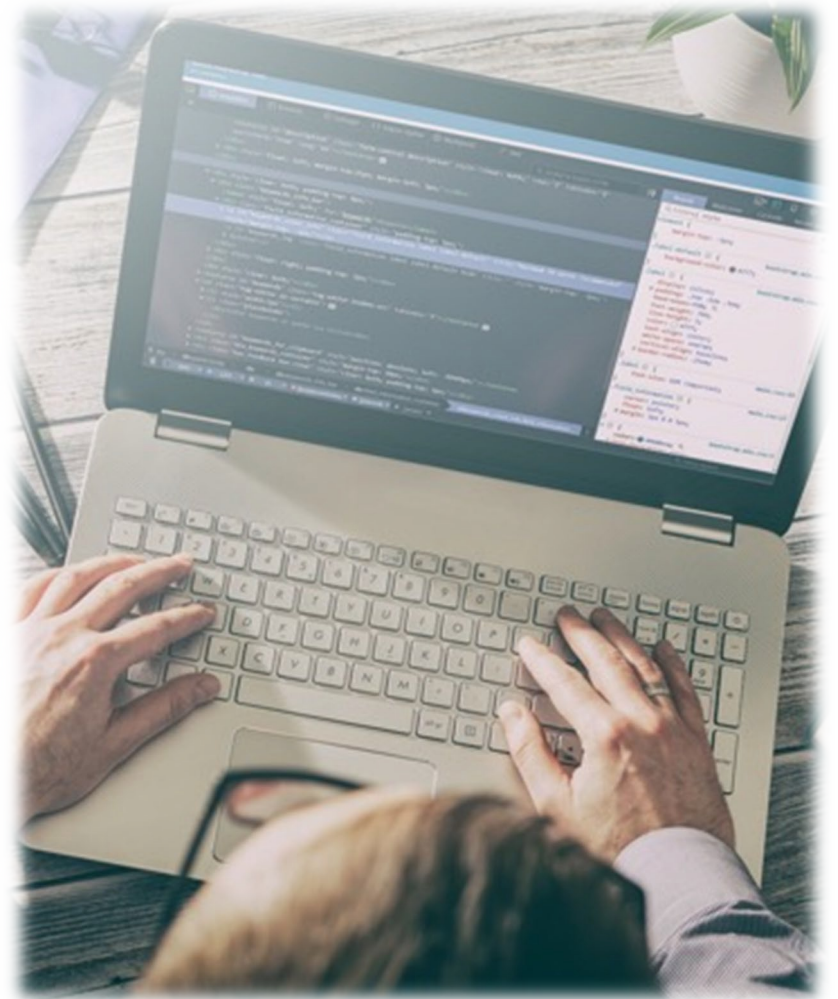
- Integrations
- Approvals and Notifications



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

clarity [← Project](#) SAP HANA Rollout On Track PR1331

Properties Conversations Staff Tasks Links Financials Risks Issues Changes Status Task List Financial Plans Document Manager

▼ Collapse All Actions ▼

- SP Site Creation
- MS Team Creation

▼ Project Summary

Project Name * SAP HANA Rollout Project ID * PR1331 Scheduler Format Workbench Work Status Requested

Start * Jun 14, 2022 Finish * Oct 8, 2022 % Complete 0% Project Type Search... Status Reporting Not Required

Department OBS Search... M Gate Search...

Objective

Document Management and Collaboration

Search or type a command Rego Consulting

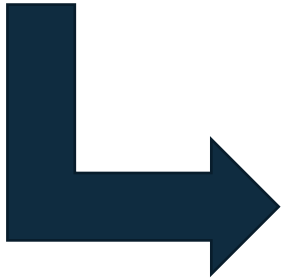
NC New Computers > General ...

Conversations Files Wiki +

General

New Upload Get link Add cloud storage Open in SharePoint

Type	Name	Modified	Modified by	Size
Word	Project SOW.docx	Just now	Luis Palacios	0.00 Bytes



clarity < Project SAP HANA Rollout On Track PR1331

Properties Conversations Staff Tasks Links Financials Risks Issues Changes Status Task List Financial Plans Document Manager

RegoLink Document Manager

RegoLink Document Manager Sign out msdemo@regiconsulting.com

Document Library
Documents

+ New Folder Upload File(s) Delete File(s) Open in Teams Refresh

Name	Owner	Modified By	Last Modified
General	Microsoft Demo	Microsoft Demo	2022-06-14

Integrate RIDAC

Clarity PPM - DEV

DASHBOARD PROPERTIES TEAM TASKS FINANCIAL PLANS HIERARCHY **RISKS/ISSUES/CHANGES** COLLABORATION ON GOING COSTS CHARGEBACKS PROJECT STORYBOA

Project: Clarity MS Teams Integration Testing - *Risks/Issues/Changes* - Risks

Filter: System Default

Risk	ID	Status	Owner	Priority	Probability	Calculated Risk	Target Resolution Date	Resolved Date	Resolved By	Category	Last Updated By	Originating Issue/Risk
Risk 1	RI0230	Open	Lyons, Stacy	High	High	Low	8/29/21			Flexibility	Administrator, Clarity	
Risk from MS Teams	1630335205	Open	Lyons, Stacy	High	High	High	9/24/21			Implementation	Flow, Clarity	
Risk 2	RI0231	Open	Lyons, Stacy	Critical	High	Critical	12/31/21			Implementation	Lyons, Stacy	

Displaying 1 - 3 of 3

SAVE NEW DELETE

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

Microsoft Teams

Teams

General Posts Files Wiki **Clarity Risks** Clarity Issues Project Notes 2 more +

+ New Edit in grid view

Title	Risk ID	Category	Status	Owner	Target Resolution Date
Risk 2	RI0231	Implementation	Open	Lyons, Stacy J	12/31/2021
Risk 1	RI0230	Flexibility	Open	Lyons, Stacy J	8/29/2021
Risk from MS Teams	1630335205	Implementation	Open	Lyons, Stacy J	9/24/2021

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

My Milestone 1 - Event

File Event Insert Format Text Review Help Tell me what y

Appointment Scheduling Assistant

Skype Meeting Online Meeting Teams Meeting Meeting Notes

Subject My Milestone 1

Location

Start time Wed 2/6/2019 12:00 AM All day event

End time Wed 2/6/2019 12:00 AM

Filter: None

Task Name

Task ID

Key Task All

Tasks Only All

Start to

Finish to

Filter Show All Save Filter Clear

Task	Task ID	Start	Finish	Baseline Fini
My Milestone 1	TSK001	2/6/19	2/6/19	
My Milestone 2	TSK002	2/12/19	2/12/19	

Status All

Is Late All

Critical All

Milestone All

Open for Time Entry All

Power Filter [Build Power Filter]

Azure Resource Interface / MS365 Directory Sync

Clarity PPM LP Luis Palacios Logout | Help | About

HOME | ADMINISTRATION | FAVORITES

Resource List

Filter: None

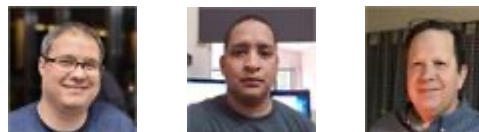
Resource/Role Name: [input]
OBS Unit: [input] [x] [i]
OBS Unit - Filter Mode: Unit only

Contractor Type: All
Employment Type: All
Active: Yes

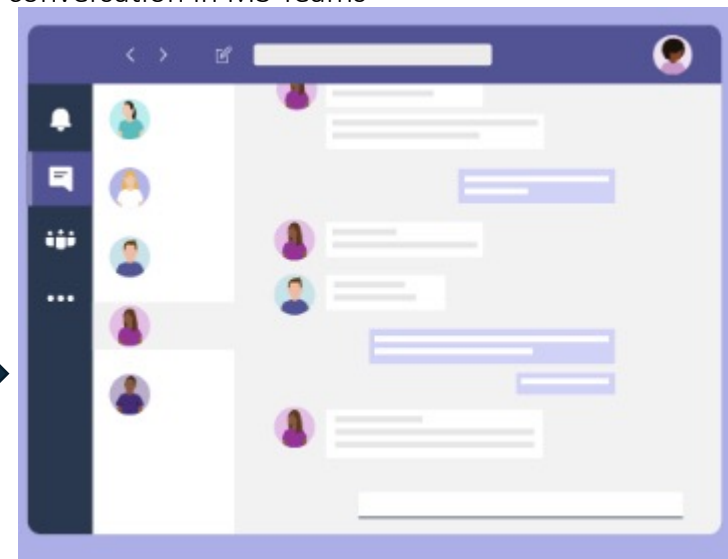
SME Finder

Resource	LOB	Role	Bio
 George Trainor	Clarity	Sales/BusDev	Experienced Software and Services executive with a demonstrated track record of managing rapidly growing services organizations. Expertise in all areas of sales, proposal development and contract management.
 Ann Schmenk	Clarity	Functional	Ann Schmenk is a Senior Instructional Designer and Senior Educator with over 25 years of experience developing and delivering instructor led, client customized training on CA PPM both virtually and in a classroom setting. She has extensive experience creating user documentation and training materials including facilitator guides, presentations, user training guides, and quick reference cards. In addition, Ann has a strong background in project management and business analysis with proficiency in developing requirements, functional specifications, and standard operating procedures.
 Daniel Greer	zADMIN	Office	Daniel Greer is one of the founders of Rego Consulting and is an expert in process improvement, business strategy, and financial analysis. Dan's skills and expertise have made Rego the largest independent CA PPM consulting company in the world.

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

The top screenshot shows the Resource Sheet view for project PRJ00226.mpp. The Resource Sheet table is as follows:

Resource Name	Type	Material	Initials	Group	Max	Base	Code
Developer	Work		csk.develop		100%	Standard	csk.developer
Project Manager	Work		csk.projectM		100%	Standard	csk.projectManager
Test Engineer	Work		csk.testEngi		100%	Standard	csk.testEngineer
Architect	Work		csk.architec		100%	Standard	csk.architect
Business Analyst	Work		csk.business		100%	Standard	csk.businessAnalyst
Network Engineer	Work		csk.network		100%	Standard	csk.networkEngineer
Storage Architect	Work		csk.storageA		100%	Standard	csk.storageArchitect
Sridhar Bandaru	Work		sri		100%	Standard	sri
James Butt	Work		jbutt		100%	Standard	jbutt
Joshua Leone	Work		jleone		100%	Standard	jleone
Taunya Moore	Work		tmoore		100%	Standard	tmoore

The bottom screenshot shows the Gantt Chart view for project PRJ00077.mpp. The task list is as follows:

Task Name	Duration	Start	Finish	Predecessors
Functional and Technical Design	10 days	Mon 10/15/18	Fri 10/26/18	13
Design Phase Gate Complete	1 day	Wed 10/31/18	Wed 10/31/18	14
Construction Phase	35 days	Tue 10/23/18	Mon 12/10/18	
Database Development	5 days	Tue 10/23/18	Mon 10/29/18	15
User Interface Development	5 days	Tue 10/30/18	Mon 11/5/18	17
Unit and Performance Testing	15 days	Tue 11/6/18	Mon 11/26/18	18
Construction Phase Gate Complete	1 day	Mon 12/10/18	Mon 12/10/18	19
Deployment and Quality Phase	18 days	Mon 12/3/18	Wed 12/26/18	
Functional and Sys	5 days	Mon 12/3/18	Fri 12/7/18	20
Usability and User	10 days	Mon 12/10/18	Fri 12/21/18	22
Deployment Phase	1 day	Wed 12/26/18	Wed 12/26/18	23
Closing Phase	7 days	Mon 12/24/18	Tue 1/1/19	

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

File Home Insert Draw Design Transitions Animations Slide Show Record Review View Clarity Add-In Help

Record Share

Themes Variants Customize Designer

1 Stakeholder Weekly Report

2 PD1003 - Brightlight - Project Status Report

3 PD1003 - Brightlight - Project Overview

4 PD1003 - Brightlight - Project Status Report

PD1003 - Brightlight - Project Status Report

Investment ID	Report Date	Investment Manager	
PD1003	07-01-2022	Miles, Paul	
Overall Status	Schedule Status	Scope Status	Cost and Effort Status
Needs Help	Needs Help	At Risk	On Track
Status Report Update		Key Accomplishments	
Due to new customer requirements, we might have to provide a CR by end of July		Delivered phase 1 on 06/31	

Add Slide

Project: PD1003 - Brightlight - Project

Add Slide: Custom

Generate Slide

Slide 4 of 4 English (United States) Accessibility: Investigate

Notes 62%

Rego's Power Point Add-In

File Home Insert Draw Design Transitions Animations Slide Show Record Review View **Clarity Add-In** Help

Record Settings Open Slide Creator

Custom Toolbars RegoLink

PD1003 - Brightlight - Project Financials

Planned

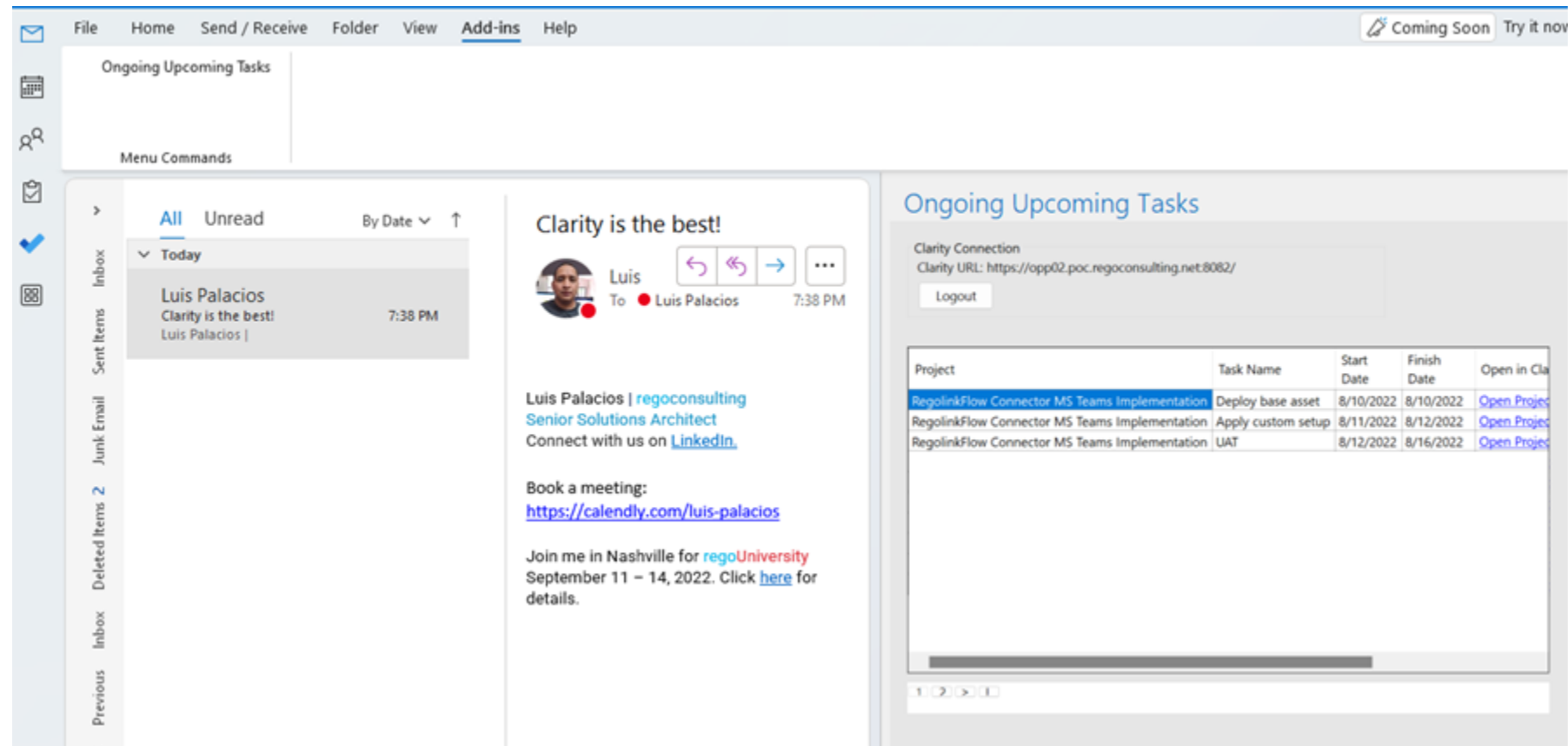
Date	Planned
8/1/2021	35000
9/1/2021	38000
10/1/2021	45000
11/1/2021	42000
12/1/2021	48000
1/1/2022	10000
2/1/2022	10000
3/1/2022	5000
4/1/2022	15000
5/1/2022	70000
6/1/2022	80000
7/1/2022	20000
8/1/2022	10000
9/1/2022	12000
10/1/2022	10000
11/1/2022	10000
12/1/2022	5000
1/1/2023	10000
2/1/2023	5000
3/1/2023	8000
4/1/2023	5000
5/1/2023	12000
6/1/2023	10000
7/1/2023	5000
8/1/2023	10000
9/1/2023	10000
10/1/2023	10000

Project: PD1003 - Brightlight - Project
Add Slide: Financials
Generate Slide

Slide 3 of 4 English (United States) Accessibility: Investigate

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



File Home Send / Receive Folder View Add-ins Help

Coming Soon Try it now

Ongoing Upcoming Tasks

Menu Commands

All Unread By Date ↑

Today

Luis Palacios
Clarity is the best!
Luis Palacios | 7:38 PM

Clarity is the best!

Luis Palacios
To Luis Palacios 7:38 PM

Luis Palacios | [regoconsulting](#)
Senior Solutions Architect
Connect with us on [LinkedIn](#).

Book a meeting:
<https://calendly.com/luis-palacios>

Join me in Nashville for [regoUniversity](#)
September 11 – 14, 2022. Click [here](#) for details.

Ongoing Upcoming Tasks

Clarity Connection
Clarity URL: <https://opp02.poc.regoconsulting.net:8082/>
Logout

Project	Task Name	Start Date	Finish Date	Open in Clarity
RegolinkFlow Connector MS Teams Implementation	Deploy base asset	8/10/2022	8/10/2022	Open Project
RegolinkFlow Connector MS Teams Implementation	Apply custom setup	8/11/2022	8/12/2022	Open Project
RegolinkFlow Connector MS Teams Implementation	UAT	8/12/2022	8/16/2022	Open Project

Easily Navigate to Clarity

Ongoing Upcoming Tasks

Clarity Connection
Clarity URL: <https://opp02.poc.regoconsulting.net:8082/>
[Logout](#)

	Task Name	Start Date	Finish Date	Open in Clarity	Action	Open in Outlook
Implementation	Deploy base asset	8/10/2022	8/10/2022	Open Project in Clarity	Add as Task	Open Task
Implementation	Apply custom setup	8/11/2022	8/12/2022	Open Project in Clarity	Add as Task	Open Task
Implementation	UAT	8/12/2022	8/16/2022	Open Project in Clarity	Add as Task	Open Task

clarity ← Project **RegolinkFlow Connector MS Teams Impl...** Needs Help

PR1313

Details Conversations Staff Tasks Links Financials Risks | >

[Collapse All](#)

Project Summary

Project Name * Project ID *

Scheduler F... Work Status

Start * Finish * % Complete

Project Type Status Repo...

Department OBS M Gate

Objective

Track your key tasks via Outlook Tasks

The screenshot displays the Outlook Task interface for a task titled "Deploy base asset". The task is overdue by 14 days. The task details include:

- Subject: Deploy base asset
- Start date: Wed 8/10/2022
- Due date: Wed 8/10/2022
- Status: Not Started
- Priority: Normal
- Reminder: None

The right-hand pane shows "Ongoing Upcoming Tasks" for the Clarity Connection. The Clarity URL is <https://opp02.poc.regoconsulting.net:8082/>. A table lists tasks added to Outlook:

Task Name	Start Date	Finish Date	Open in Clarity	Action	Open in Outlook
Deployment	8/10/2022	8/10/2022	Open Project in Clarity	Remove Task	Open Task
Deployment	8/11/2022	8/12/2022	Open Project in Clarity	Add as Task	Open Task
Deployment	8/12/2022	8/16/2022	Open Project in Clarity	Add as Task	Open Task

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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