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Rego Xchange, MUX Migrator and Surveys ... Oh My!

Your Guides:
James Gille and Ross Hensel

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Rego Xchange

One-stop-shop for the best training, workflows, reports!

<https://xchange.regoconsulting.com/>

Rego Xchange Overview

- Hundreds of items including:
 - Portlets
 - Workflows
 - Reports
 - Training
 - Modules
- Recently updated website for navigation and searching
- Self-Service with Instant Downloads
 - Find items to download...
 - Click “add to cart”
 - Click download for all
 - Immediate .ZIP file sent!



The banner features an illustration of three people (two men and one woman) sitting around a table, discussing a project. Above them are logos for 'theWorX' and 'theBasiX', with a large green question mark between them. The text 'theWorX or theBasiX?' is prominently displayed. Below this, a paragraph explains the benefits of signing up for theBasiX account, mentioning access to a wealth of invaluable assets and the power of Clarity PPM. Two green buttons are provided: 'Register for theBasiX' and 'Register for theWorX'. At the bottom, a blue navigation bar contains five icons and labels: Portlets, Reports, Presentations, Training, and Workflows.

theWorX or theBasiX?

Signing up for theBasiX account at RegoXchange gives you immediate access to a wealth of invaluable assets, allowing you to explore the possibilities and experience the power of Clarity PPM like never before. For those seeking an even deeper level of customization and specialization, our paid account, theWorX, offers premium content that goes beyond the basics, giving you an edge over the competition and accelerating your journey towards project excellence.

[Register for theBasiX](#)

[Register for theWorX](#)

Portlets **Reports** **Presentations** **Training** **Workflows**

Sample Rego Xchange Items



- [Rego Power Filter Sync](#)

- Automatically sync in new investments to Roadmaps and Hierarchies based upon filters



- [Roadmap Ranking Rules](#)

- Setup rules that align with your organization's priorities and systematically prioritize them as a starting point



- [Quick Reference Guides](#)

- Don't start your training from scratch! Pull training materials and quickly modify for your organization's needs



- [Roles in Roadmaps](#)

- Pull in allocation information and see it in timescale across the investments included in your Roadmap

MUX Migrator

Save time and energy!

<https://regoconsulting.com/clarity-ppm-innovation/#mux>

MUX Migrator Overview

- Allows clients to migrate MUX configurations between environments and to push default views to Resources, Security Groups, and OBS Units. These configurations include:
 - Blueprints
 - Field Level Security
 - Views
- Creates packages of one-to-many components (Blueprints, FLS and Views)
- Migrations are done via JSON import/export
- Define and reset default grid views across objects
- Simple and easy to use UI

MUX Migrator Sample

- Save time and effort and keep track of deployment items utilizing the MUX Migrator custom object.
- Easily import the file into your environments to rapidly deploy changes.

Export FLS

MUX00000032

Properties

MUX Configuration

>>

< Collapse all

Actions

Ge...

< Summary

Name *

Export FLS

Integration Approach *

JSON

Process Status

Success

Description

Process Message

FLS Json Export Started Object : project
FLS Json Export Completed Object : project
File Uploaded

< JSON

JSON File

mux_file.txt

Survey Module

Collect all the feedback!

<https://regoconsulting.com/clarity-ppm-innovation/#survey>

Survey Module Overview

- It's built for quick **one** question surveys. One clickable item (i.e., 1-5 ranking) and one open text field
 - Survey team members
 - Survey project stakeholders
 - Survey Clarity users
 - Survey Project Managers, Resource Managers, Timesheet users, and more
- Choose from several premade survey types:
 - Emojis
 - Stars
 - Numbers
 - Thumbs-up/down
- Customize the verbiage and even use custom variables within the emails to call out specific users, project names or IDs
- Built on Rego's Action Item Responder

Sample Survey Email from Template

clarity

Survey Template

IT Project: Project Manager Feedback
TMP000007

Properties

Collapse All

Send Sample Email

Summary

Name *

IT Project: Project Manager Feedback

ID *

TMP000007

Survey Type *

Project

Active

Survey Content

Subject

Project Manager Feedback Requested - \${code}

From Name

\${manager}

Email Body - Upper

\${firstName} \${lastName},

The PMO is requesting feedback on [PR1095 - A Collaboration Initiative](#). Using the emoji icons below, ranked from least satisfied to most satisfied, please click the emoji. Once selected, enter any feedback on this project in the email reply.

Project Manager: Fleming, Nicole

Survey Response Type

Emoji (1-5)

Email Body - Lower

Customer satisfaction is a top priority for our organization. Your feedback help reward, drive change and improve future project execution. We appreciate your participation.

Thank you,
Clarity Administration
Clarity Application at \${appUrl}

Built-In Variables

General Variables:

\${appUrl}

 - Application URL for the current environment

\${firstName}

 - First Name of the resource being surveyed

\${lastName}

 - Last Name of the resource being surveyed

Investment Specific Variables:

\${id}

 - Internal DB ID of the investment

\${code}

 - External ID of the investment

\${name}

 - Name of the investment

\${manager}

 - Manager of the investment

Project Manager Feedback Requested - PR1095 - Clarity Survey - ross.hensel@regoc...

Delete

Archive

Move

...

Project Manager Feedback Requested - PR1095

FN

Fleming, Nicole <no-reply@regiconsultin...>

Monday, February 20, 2023 at 10:49 PM

To: Ross Hensel

clarity

Ross Hensel,

The PMO is requesting feedback on [PR1095 - A Collaboration Initiative](#). Using the emoji icons below, ranked from least satisfied to most satisfied, please click the emoji. Once selected, enter any feedback on this project in the email reply.

Project Manager: Fleming, Nicole

Unsatisfied

Slightly Dissatisfied

Indifferent

Slightly Satisfied

Satisfied

Customer satisfaction is a top priority for our organization. Your feedback help reward, drive change and improve future project execution. We appreciate your participation.

Thank you,
Clarity Administration
Clarity Application at <https://opp02.poc.regiconsulting.net:8082>

Please do not respond to this email as this is an automatically generated message.

Schedule Surveys and Select Recipient(s)

- Send surveys to specific groups, users, and investment level fields.
- Schedule surveys to be sent.
- Anonymize results.
- Max surveys to be sent if sending to a large group for feedback.

The screenshot shows the 'clarity' interface for configuring a 'Project Survey' (ID: S000001). The interface includes a left sidebar with navigation icons and a main content area with the following sections:

- Properties**: Includes a 'Survey Response' tab and a 'Collapse All' button.
- Summary**: Contains fields for 'Name *' (Project Survey), 'ID *' (S000001), 'Survey Type *' (Project), 'Survey Template' (Clarity: Project Manager ...), 'Survey Date' (Feb 13, 2023), and an 'Anonymize' checkbox.
- Investments**: A text field containing 'Survey Test Project 1; Survey Test Project 2'.
- Survey Recipients**: A section with three sub-sections:
 - Groups**: An empty text field.
 - Resources**: A text field containing 'Gille, James'.
 - Resource Fields**: A text field containing 'Investment Team; Manager; Sponsor'.

Survey Responses

- View Survey responses within the survey itself, or via a portlet looking across all surveys.
- Export data to analyze and triage feedback.
- Uses Clarity's existing security model so administrators may customize who is able to view results.

The screenshot displays the Survey Dashboard interface. At the top, four summary boxes show: Surveys Sent (10), Responses (7), Outstanding (3), and Avg Score (57). Below these, a table lists individual survey responses with columns for Name, Investment, Score, and Feedback. The table includes entries for Cooper, Andy (Score 100), Hensel, Ross (Score 50), and Roberts, Beth (Score 75). A sidebar on the left shows a list of surveys with checkboxes. The main content area is titled 'Survey Dashboard: All Surveys' and includes a table with columns for Created By, Survey, Template, Survey Date, Response Type, Response Status, Survey Type, Investment, Email, Resource, Score, and Feedback. The table displays seven rows of survey data.

Surveys Sent	Responses	Outstanding	Avg Score
10	7	3	57

Name *	Investment	Score	Feedback
☐ Cooper, Andy	A Collaboration Initiative	100	Game-changer for our organization. It streamlined our processes and saved us valuable time and resources. Highly recommend!
☐ Hensel, Ross	A Collaboration Initiative	50	The project was implemented as expected, but it didn't bring any significant improvements to our operations. It was just okay
☐ Roberts, Beth	AC SAFE Implementation	75	The team did an excellent job with the project. They were responsive to our needs and provided creative solutions to our challenges. Thank you!

Created By	Survey	Template	Survey Date	Response Type	Response Status	Survey Type	Investment	Email	Resource	Score	Feedback
Hensel, Ross	Stakeholder Feedback	Project Stakeholder Survey	2/21/23	Thumbs (Up/Sideways/Down)	Responded	Project	A Collaboration Initiative	andy.cooper@mailserver.com	Cooper, Andy	100	Game-changer for our organization. It streamlined our processes and saved us valuable time and resources. Highly recommend!
Hensel, Ross	Stakeholder Feedback	Project Stakeholder Survey	2/21/23	Thumbs (Up/Sideways/Down)	Responded	Project	A Collaboration Initiative	ross.hensel@regoconsulting.com	Hensel, Ross	50	The project was implemented as expected, but it didn't bring any significant improvements to our operations. It was just okay
Hensel, Ross	Stakeholder Feedback	Project Stakeholder Survey	2/21/23	Thumbs (Up/Sideways/Down)	Responded	Project	AC SAFE Implementation	pam.olney@mailserver.com	Olney, Pam	50	Minor glitches, but overall it was functional. It didn't wow us, but it didn't disappoint us either.
Hensel, Ross	Stakeholder Feedback	Project Stakeholder Survey	2/21/23	Thumbs (Up/Sideways/Down)	Responded	Project	Allocation Material Tracker	pam.olney@mailserver.com	Olney, Pam	100	Project exceeded our expectations. It was delivered on time, within budget, and with exceptional quality. We are very satisfied with the outcome.
Hensel, Ross	Stakeholder Feedback	Project Stakeholder Survey	2/21/23	Thumbs (Up/Sideways/Down)	Responded	Project	Application for Tracking Claims	pam.olney@mailserver.com	Olney, Pam	0	Project was delayed multiple times, and when it was finally implemented, it didn't meet our requirements. Very disappointed with the outcome.
Hensel, Ross	Stakeholder Feedback	Project Stakeholder Survey	2/21/23	Thumbs (Up/Sideways/Down)	Responded	Project	Application for Tracking Claims	alysen.poston@regoconsulting.com	Roberts, Beth	25	The project was a disaster. It caused more problems than it solved, and we had to spend a lot of time and money fixing the issues. Would not recommend.
Hensel, Ross	Stakeholder Feedback	Project Stakeholder Survey	2/21/23	Thumbs (Up/Sideways/Down)	Responded	Project	AC SAFE Implementation	alysen.poston@regoconsulting.com	Roberts, Beth	75	The team did an excellent job with the project. They were responsive to our needs and provided creative solutions to our challenges. Thank you!

Questions?



Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.





Master Clarity with Rego University

Earn Certifications in
Administration, Leadership,
and Technical Proficiency

Let Rego be your guide.



Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to continue our **certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **Eligibility:** Open to all Rego University attendees



Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

Thank You for Attending Rego University

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 = **Rego University**
- 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.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

www.regouniversity.com

Continue to Get Resources and Stay Connected

- 1 Use RegoXchange.com for instructions and how-tos.
- 2 Talk with your account managers and your Rego consultants.
- 3 Connect with each other and Clarity experts at RegoGroups.com.
- 4 Sign up for webinars and join in-person Rego groups near you through at RegoConsulting.com
- 5 Join us for the next [Rego University](https://RegoUniversity.com)!

