

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!



Sample Rego Xchange Items





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

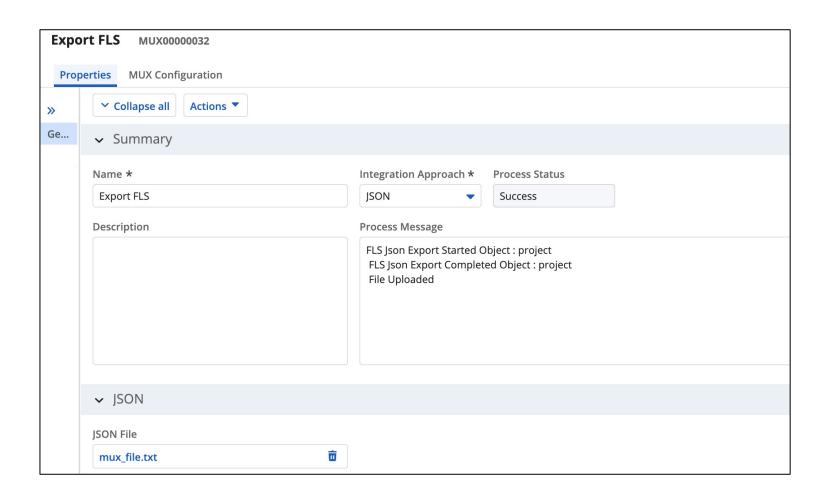


MUX Migrator Overview

- 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.



Survey Module

Collect all the feedback!

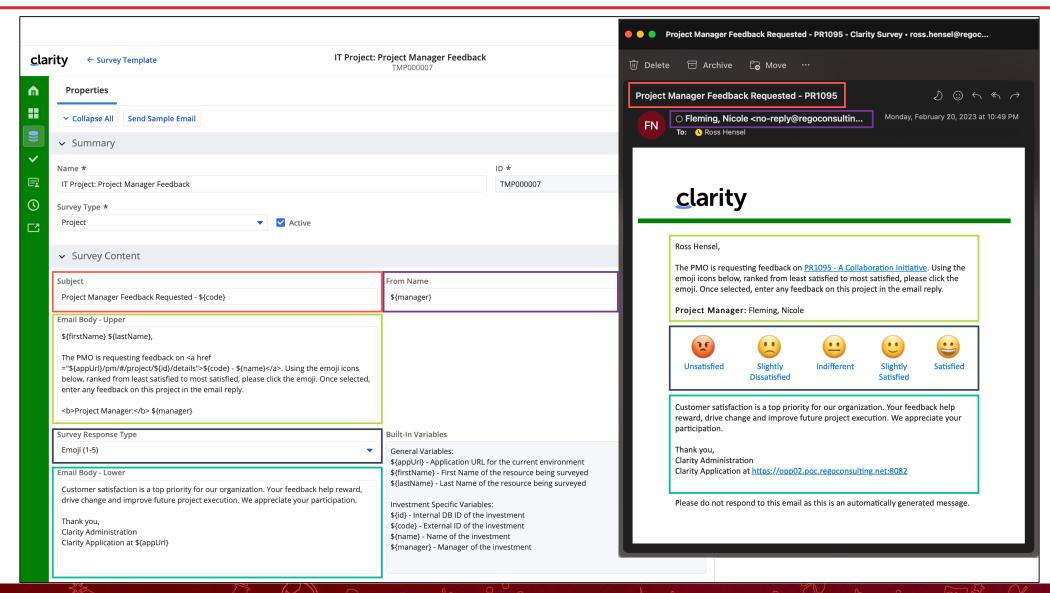
https://regoconsulting.com/clarity-ppm-innovation/#survey



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



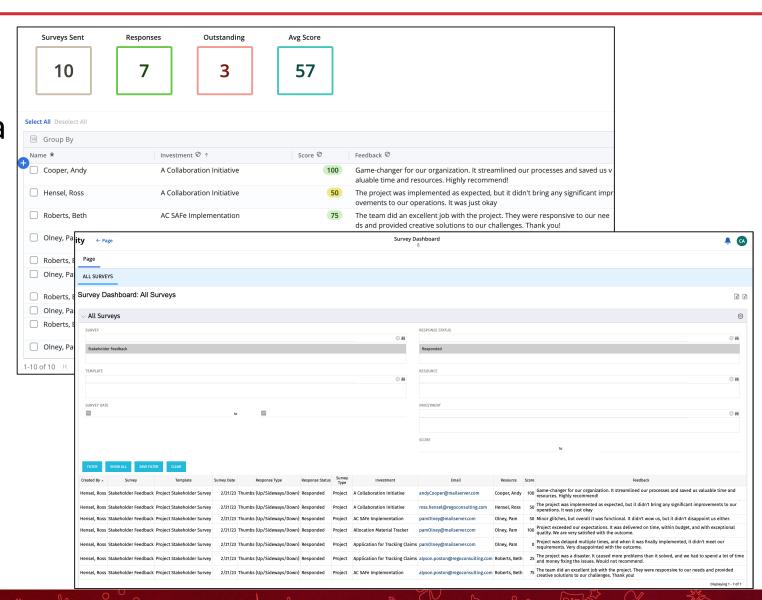
Schedule Surveys and Select Recipient(s)

- 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.



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.



Questions?





Surveys

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





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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.









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Completion: 12 units per certification track

✓ Eligibility: Open to all Rego University attendees



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- 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.



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Continue to Get Resources and Stay Connected

- Use <u>RegoXchange.com</u> for instructions and how-tos.
- Talk with your account managers and your Rego consultants.
- Connect with each other and Clarity experts at <u>RegoGroups.com</u>.
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