regoUniversity
SAN ANTONIO • 2026

Rego Xchange & FREE MUX Migration Tool, Surveys

Your Guide:
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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!

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!

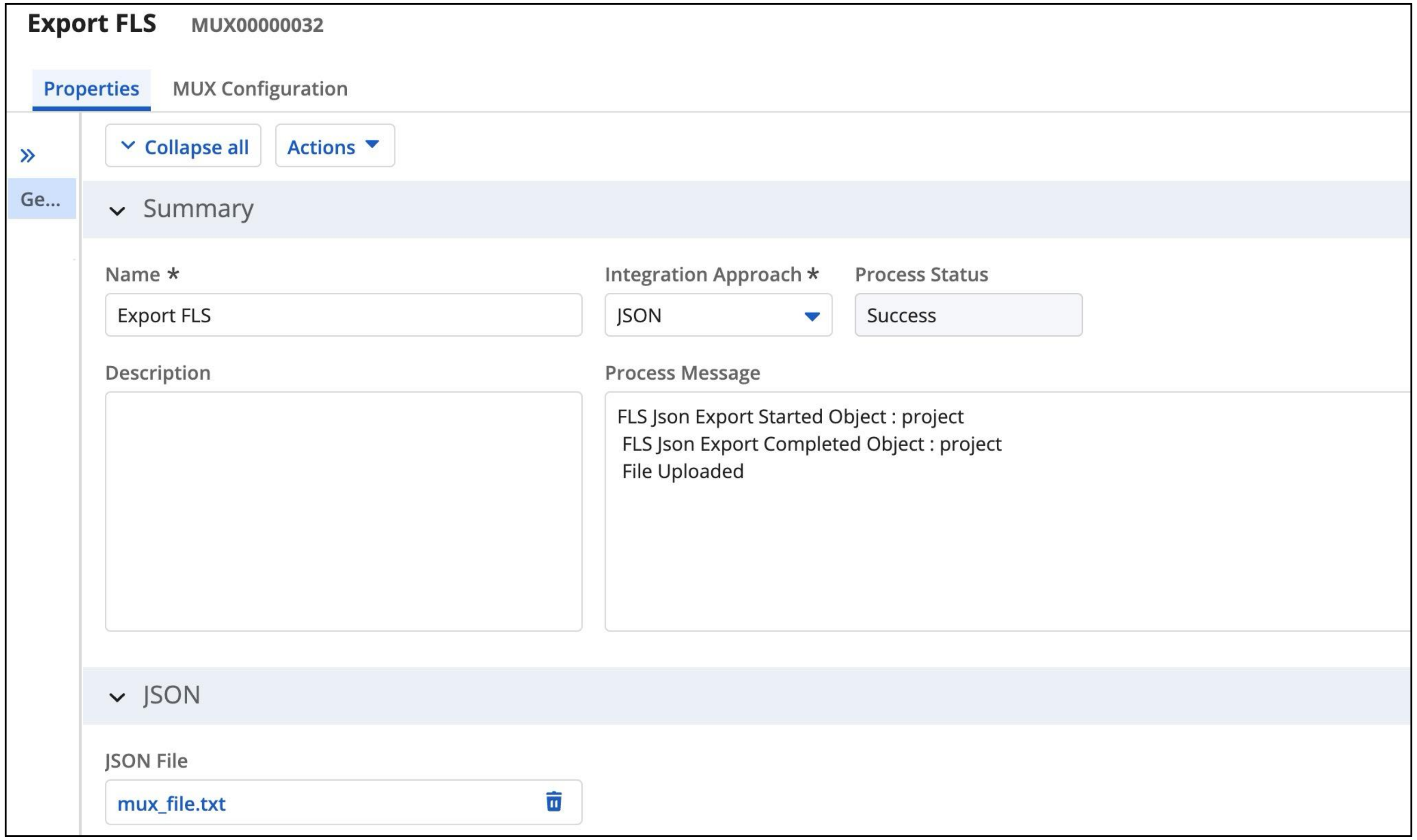
https://regoconsulting.com/clarity-ppm-innovation/#mux

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.



Survey Module

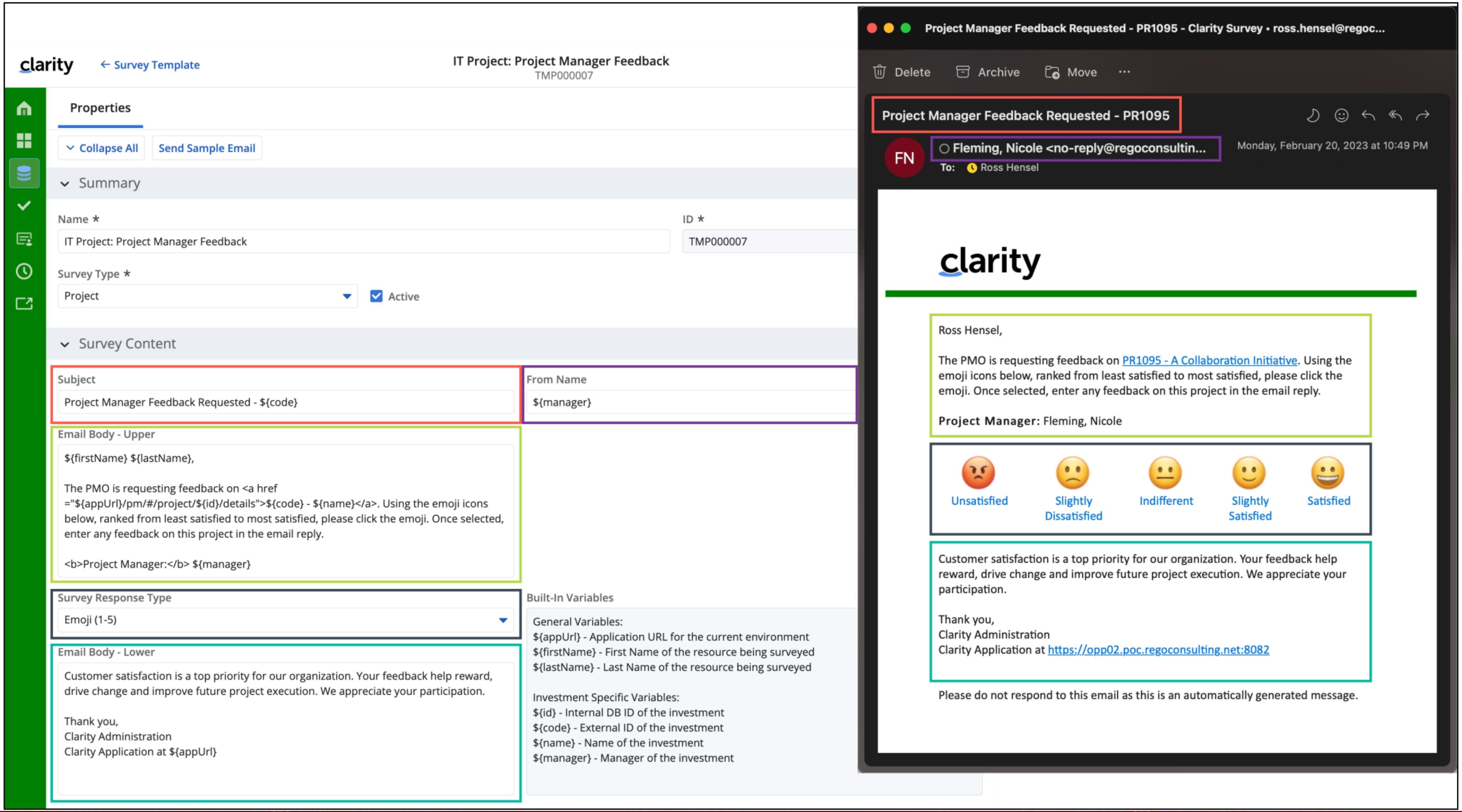
Collect all the feedback!

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

Survey Module Overview

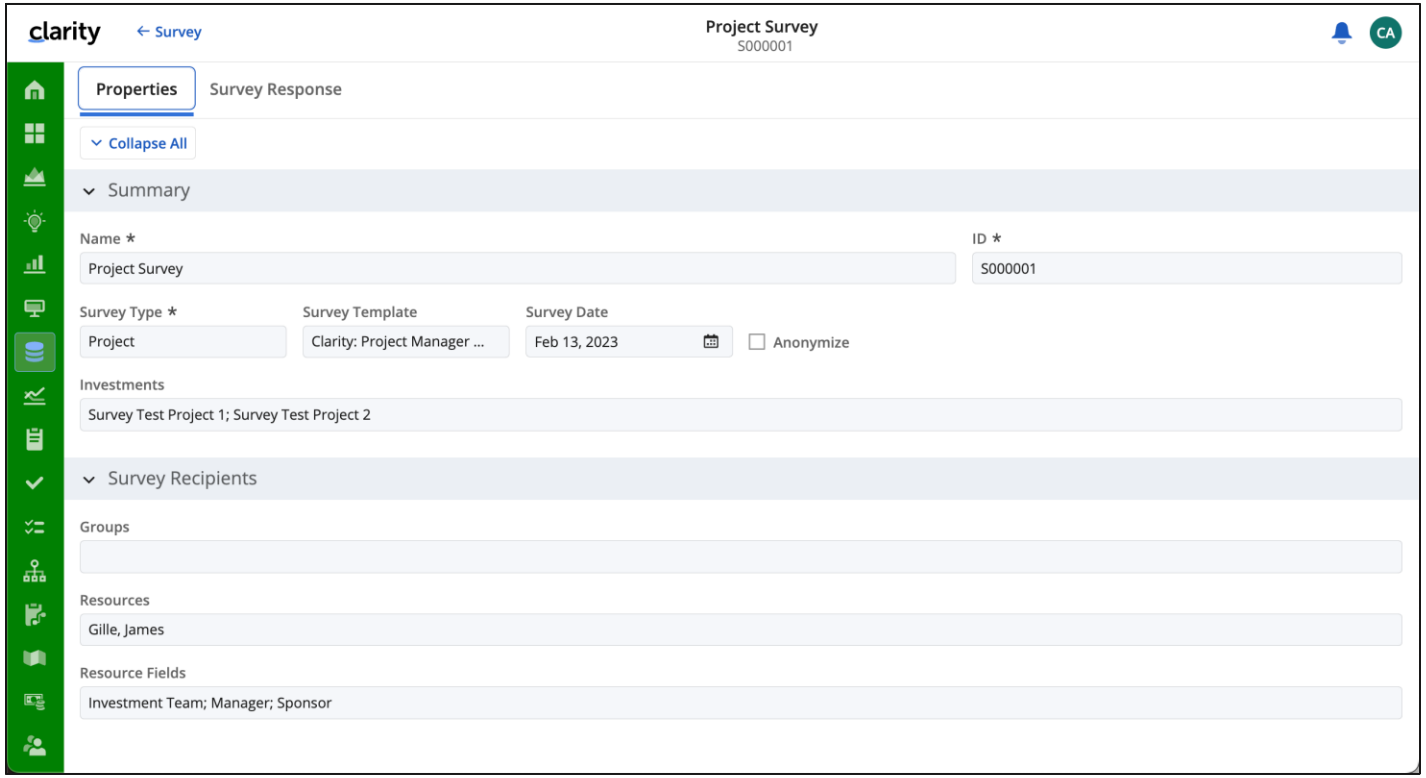
- It’s built for quick **one** question surveys. One clickable item (i.e., 1-5 ranking) and one open text field
  - Survey team members
  - Survey project stakeholders
  - Survey Clarity users
  - Survey Project Managers, Resource Managers, Timesheet users, and more
- Choose from several premade survey 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



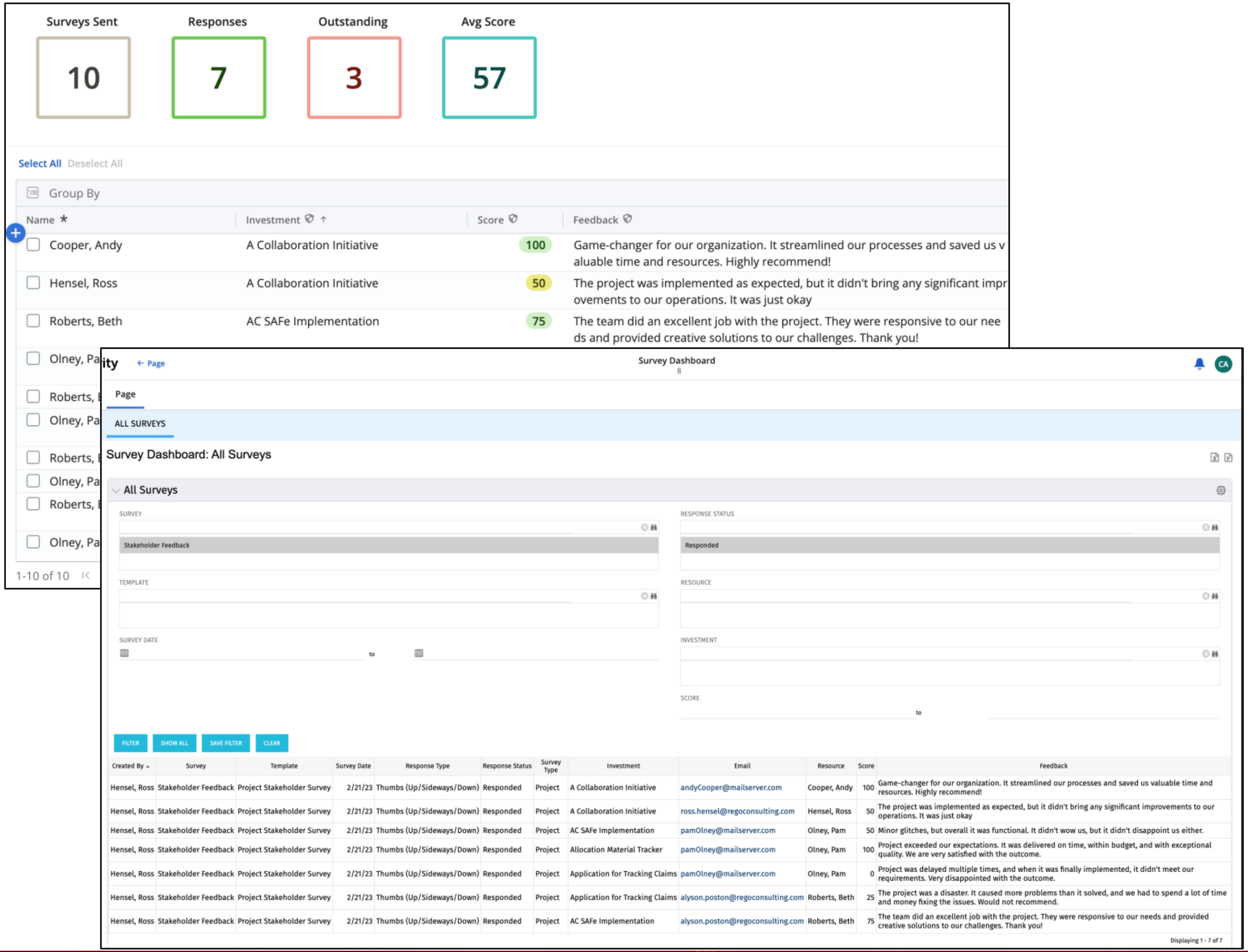
Schedule Surveys and Select Recipient(s)

- 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?

Survey

Please take a few moments to fill out the class survey.

Your feedback helps us improve future events.

Earn Rego University Certifications and Professional Specializations

Your participation in this class may count toward Rego University certification progress.

Certifications

Build recognized Clarity expertise.

Complete 10 eligible learning units within a certification track.

Best Practice Clarity Administrator

Best Practice Clarity Lead

Professional Specializations

Deepen your skills in focused topic areas.

Complete 4 eligible learning units within a selected specialization, with the option to earn multiple specializations.

Artificial Intelligence (AI)

Reporting & Analytics

Technical

***Important:* Complete the class survey in the app after each session so your credits can be tracked.**

More info: https://regouniversity.com/certificates

Earn PMI credit

Eligible Rego University sessions qualify for Professional Development Units (PDUs)

- 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!
Remember to fill out the class survey.

Phone
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Email
info@regoconsulting.com

Website
https://regouniversity.com/pmi-credits/

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