RegoXchange Content List

Name	ID	Work Type	Location	Long Description
% Time by Type and Timescale - Column Graph	EX0003	Portlet	theBasiX	The Percent Time by Type and Timescale - Graph portlet shows a breakout of time by timescale for resources the logged in user has view rights to. This portlet gives the Clarity PPM user the ability to show the amount of hours spent on each project type by week, month, quarter and year. Using this portlet, the Clarity PPM user can get an overview of all hours in a time period or use the filter to search for a specific dataset (as required). The portlet provides a filter for OBS and date ranges.
% Time by Type and Timescale - Grid	EX0006	Portlet	theBasiX	The Percent Time by Type and Timescale - Grid portlet shows a breakout of time by timescale for resources the logged in user has view rights for using the timeslices. This portlet gives the Clarity PPM user the ability to show the amount of hours spent on a project by week, month, quarter and year. Using this portlet, the Clarity PPM user can get an overview of all hours in a time period or use the filter to search for a specific dataset (as required). The portlet provides a filter for OBS and date ranges.
6 Keys to Evaluating a PPM Solution - Webinar	EX1592	Presentation	theBasiX	The PPM market has exploded with new functionality for enterprise management, and with the cascading influx of tools now available for end-to-end project management, narrowing the field can be a daunting process. Join Rego's Jacob Cancelliere, Project and Portfolio Management Specialist, as he covers six key areas for evaluating your PPM Solution. From dependencies to implementation requirements and user communities, learn how to vet your PPM solution with confidence.
6 Trends for Healthcare - white paper	EX1625	Presentation	theBasiX	The Top Six Trends For PPM Wellness in Healthcare With all of the new regulations, acquisitions, and technologies in the healthcare industry, it can be exhausting just trying to keep up—even for the most astute project management professionals. That's why it's important to stay on top of the latest PPM trends. And, to know which trends will help you achieve your organization's goals—whether they're streamlining your compliance and regulatory processes, improving patient care, getting a product to market, or achieving your top strategic priorities. In this report, we outline the top 6 trends for PPM wellness in the current healthcare climate.
6 Ways to Speed Up Ideation - Webinar	EX1604	Presentation	theBasiX	In a rapidly changing business climate, speed and agility are on the minds of top executives and CIOs, as they look for ways to deliver faster. Many organizations are looking at adopting Agile; however, working faster doesn't help much if you have a cumbersome Ideation process. Join Rego's expert guides as they discuss the six things you can do to speed up your ideation process.
6 Ways to Speed Up Ideation - white paper	EX1624	Presentation	theBasiX	In a rapidly changing business climate, speed and agility are on the minds of top executives and CIOs, as they look for ways to deliver faster. Many organizations are looking at adopting Agile; however, working faster doesn't help much if you have a cumbersome Ideation process. See what six things you can do to speed up your ideation process.
7 Industry Trends for PPM - RegoU 2018	EX1470	Presentation	theBasiX	What should I expect to see within my organization related to PM over the next couple of years? How should I prepare my PMs, PMOs, or myself to embrace the new trends within the industry? This class shared Rego's observations on industry trends within PPM.
7 Trends You need to Know - white paper	EX1626	Presentation	theBasiX	One of the most frequent questions we're asked by clients is what are the latest best practices and trends you see? Well, you're in luck! We've polled 120 of our expert guides and consolidated their feedback into Rego's 7 PPM Trends you Need to Know.
8 Ways to Stay Out of the Box - white paper	EX1627	Presentation	theBasiX	Every new Clarity PPM (Clarity PPM) implementation begs the question, "How much configuration do we need?" And it's not just new companies asking. We have many customers with established environments who turn to Rego Consulting with a similar question: "Are we over-configured? The environment feels out-of-control." With the help of Rego Guides Wes McCoubrie (Clarity PPM Consultant) and Jerry Dolak (Clarity PPM Project Delivery), we'll review When, Why, & How to Stay Out-of-the-Box with Clarity PPM.

Name	ID	Work Type	Location	Long Description
A Deep Dive into Jaspersoft - RegoU15	EX1038	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of A Deep Dive into Jaspersoft. The presentation covers getting started with Jaspersoft Studio; creating your first Jaspersoft Report; sorting, grouping, dynamic headers and images; adding a logo; creating a template; adding budget info; adding style; input controls & parameters; and report deployment. Then it gets into more advanced elements: multi-select input controls; sub reports; charts & linked reports; linking to Clarity PPM; Base64 images; properties configuration; and scriptlets.
A Guide to Measuring PMO Success - white paper	EX1629	Presentation	theBasiX	Do you have a clear set of metrics and outcomes to demonstrate your PMOs value? Download Rego's free guide to measuring and reporting on PMO success.
A Practical Guide to a BiModal Agile and PPM Practice - white paper	EX1628	Presentation	theBasiX	The Agile manifesto embraces change—and the ability to respond to it quickly. While the method is rapidly gaining traction, the thought of actually adopting Agile practices and tools fills many PMOs with dread. It's a major disruption that requires re-engineering processes, governance, and toolsets. Not to mention mindsets. This paper discusses important things to consider when you incorporate Agile practices and tools. It points out common pitfalls to avoid and provides best practices to ease your transition. The information is based on the experiences of Rego Consultants who, over the past 10 years, have trained more than 300,000 people in PPM and guided more than 500 organizations through their PPM journeys, including 35% of Fortune 100 companies and 50% of Fortune 20 companies.
Accessing and Creating Ideas QRC	EX1242	Training - Doc	theBasiX	A Quick Reference Card to assist in the creation of Ideas in Clarity PPM. Ideas are created by going to Home, then Demand Management and choosing Ideas from the list menu.
Accessing and Creating Incidents QRC	EX1243	Training - Doc	theBasiX	A Quick Reference Card to assist in the accessing and creation of Incidents in Clarity PPM. Incidents can be found by going to Home, then Demand Management to the Incident list menu item.
Accessing and Launching the Schedulers QRC	EX1253	Training Document	theBasiX	A Quick Reference Card to assist in the use of the Schedulers in Clarity PPM. The "Open in Scheduler" drop-down will contain either MS Project or Open Workbench (OWB) as the chosen scheduler.
Accessing and Updating the Project Properties QRC	EX1254	Training Document	theBasiX	A Quick Reference Card to assist in the finding and updating of Project Properties in Clarity PPM.
Accessing Logs via GEL Script for On-Demand Client	EX0946	Technical Trick	theWorX	This process emails a log file, as an attachment, to the specified email address. This is useful for On-Demand clients to be able to view the entire log file instead of just a partial one in the "security.logs" hidden page.
Accessing Projects and Creating Filters QRC	EX1255	Training Document	theBasiX	A Quick Reference Card to assist in the accessing of projects and creation of filters in Clarity PPM.
Accessing Resources and Creating Custom Filters QRC	EX1268	Training Document	theBasiX	A Quick Reference Card to assist in accessing Resources and creating custom filters. Card reviews creating a filter to efficiently find resources and then saving the filter for future use.
Account Settings QRC	EX1232	Training - Doc	theBasiX	A Quick Reference Card to help you with your account settings in Clarity PPM. Reviews the Personal Information, Proxy, Notifications, and Software Downloads tabs.
Action Item Reassignment in Clarity	EX1685	Workflow	theWorX	The Action Item Reassignment – Workflow provides the ability to reassign an action item(s) that has been sent out to a resource. You first choose the resource who currently has the action item(s) sitting in their queue. Next, you choose the resource you want to reassign the action item(s) to. Finally, you select one to many action items you want to re-associate before running the process. After all the fields are set, the process can be run which will re-associate the action items from one resource to the other.
Action Item Responder - Update Clarity PPM from Email - Webinar	EX1593	Presentation	theBasiX	Want to read, respond, and repeat without leaving your inbox? Finally, we have a way to respond to action items without logging into Clarity PPM. Whether you're a stakeholder, resource manager, project manager, or decision maker, Rego's Action Item Responder will give you all the information you need to make a decision from your email, attach notes in Clarity PPM, and let you move to the next thing on your list. This new solution will work for ANY type of workflow needing a response. Join Rego's Chief Technology Officer, Josh Leone, as he shows this simple, fast and affordable way to utilize Clarity PPM.
Action Items Overdue Stalker Email	EX1063	Workflow Job	theWorX	This process generates an email that is sent the assigned resource(s) of past due action items, as well as their resource manager(s). The email contains the name, description, and status of each action item, as well as a hyperlink to the action item. Emails are only generated on action items that are not Closed and have due dates in the past. This process can be scheduled via the Execute a Process job.

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Active Workflow Processes	EX0007	Portlet	theWorX	The Active Workflow Processes portlet allows you to view all of the workflow processes within the system. It shows information about the process: the objects related, the start type, and if the process has sub-processes, jobs, or GEL scripts. This portlet is used by admins to determine how many processes are currently running in the system and on which objects. It will also display the start action, how many GEL scripts reside in the process, the run count and how many the sub-processes each process has. This information is helpful during upgrades and other testing.
Actuals & ETC by Resource Assignment – Power BI	EX1661	Report	theWorX	Actuals & ETC by Resource Assignment report provides project managers a single place to view Actuals and ETC associated with resources across multiple Tasks and Projects. It displays the following: Actual and ETC Hours by Start Date: Stacked Column chart that displays the total Actual hours and ETC hours per month of fiscal period. Grey color indicates Actuals and Purple indicates ETC hours during that month. Grid: Displays Investment name, Task, Assigned resource ETC and Actual hours per month of fiscal period. It also displays aggregated column and row totals for Actuals and ETC hours. You can further narrow your search by OBS Type, OBS Path & Start Date range.
Actuals/ETC/Allocations per Resource	EX1119	Portlet	theWorX	The portlet displays posted time by project for the logged in user based on time period and date range. This allows the user to see at a glance their ETC and actuals on the projects. The portlet displays the Total Allocation and Total Actuals to Date for the user on the projects they are allocated/assigned to. The actuals are displayed per month in the form of TSVs.
Ad Hoc View to Report Via Template Workaround - Jaspersoft	EX1638	Technical Trick	theBasiX	This tech-trick details the steps to convert an ad-hoc view to a report.
Adding an Extension Font for PDF Export - JasperSoft Dev	EX1218	Technical Trick	theWorX	JasperSoft as two font databases – one for display and one for pdf exporting. Not all fonts in the display database are in the exporting database. If you find you are not getting the proper fonts when exporting to PDF from JasperSoft this tech trick will show you how to add the missing font so your report exports as expected.
Adding Images to Clarity PPM	EX0800	Technical Trick	theBasiX	This Tech Trick provides step-by-step instructions for adding images into Clarity PPM v13+ for use in portlets.
Adding JasperSoft Reports to HTML Portlet - JasperSoft Dev	EX1216	Technical Trick	theWorX	This tip with show you the html needed to add a JasperSoft report to a Clarity PPM HTML portlet.
Adding RegoXchange Jaspersoft Reports	EX1551	Technical Trick	theBasiX	A tutorial on adding RegoXchange Jaspersoft Report to your Clarity PPM instance. The tech trick document take you screen by screen to the get you to the point where you are importing the .zip file from RegoXchange.
Adding Resource Skills QRC	EX1269	Training Document	theBasiX	A Quick Reference Card to assist in the adding of Resource Skills within Clarity PPM. Skills are used to indicate a resource's core capabilities as they relate to investment work. Skills on the Resource Record reflect the activities that will be performed on the investment (For example: COBOL, DB2, HTML, PeopleSoft). Once skills are added to the profile you may use Proficiency, Interest and Weighting to indicate level.
Adding Resources and Roles QRC	EX1256	Training Document	theBasiX	A Quick Reference Card to assist in the adding of Resources & Roles to a project in Clarity PPM.
Adding Subprojects to Programs QRC	EX1249	Training - Doc	theBasiX	A Quick Reference Card to assist in the adding of Subprojects to Programs. Shows how add and remove from the Subprojects Subpage or from the Hierarchy Tab.
Adding Webi Reports to Clarity PPM PPM	EX0943	Technical Trick	theBasiX	Webi reports on the Business Objects server can be added to Clarity PPM just like any Crystal report. To add a Webi report, follow the steps outlined in this document.
Admin Ability to Login as Any User	EX0885	Technical Trick	theWorX	This solution provides an administrator the ability to log into the Clarity PPM application as any user in the system. This ability is especially helpful when troubleshooting user issues and security settings.
Administration | Advanced	EX1405	Presentation	theWorX	Course description: "Learn advanced administrative development tasks—including Objects and Fields, Basic SQL Queries, Object Portlets, Basic Processes, and XOG—in this technical Clarity PPM class for non-technical people." Download file is the presentation slide deck.
Administration | Advanced Basic Processes - RegoU 2016	EX1120	Presentation	theWorX	A review of Clarity PPM Processes and their functionality. Starts with an overview of what processes can do within Clarity PPM and then goes into design basics. An Example/Exercise is also covered.
Administration | Advanced Basic SQL - RegoU 2016	EX1121	Presentation	theWorX	This RegoU 2016 presentation covers the definition of SQL, using SQL within Clarity PPM, basic SQL Syntax, SQL concepts, and what else can SQL do.
Administration | Advanced Objects and Fields - RegoU 2016	EX1123	Presentation	theWorX	A 2016 RegoU presentation that covers the use of objects and fields within Clarity PPM. The course outline covers a Clarity PPM Studio overview, objects, attributes and fields, views and the Action Menu.

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Administration | Advanced Portlets, Lookups, & Queries - RegoU 2016	EX1127	Presentation	theWorX	A RegoU course and presentation that reviews the definition of and use of Lookups in Clarity PPM. Queries and Portlets are also reviewed.
Administration | Advanced UI Themes, Menus, Options, & Financials - RegoU 2016	EX1124	Presentation	theWorX	A RegoU 2016 presentation that covers User Interface themes, menu configuration, systems options and financial administration within Clarity PPM.
Administration | Beginner - RegoU 2016	EX1126	Presentation	theWorX	Learn administrative tasks and best practices in this basic administration Clarity PPM training, which includes setting up resources, security groups, OBSs, lookups, time reporting periods, fiscal time periods, calendars, jobs, and timeslices.
Administration Advanced - RegoU 2018	EX1548	Presentation	theWorX	Learn advanced administrative development tasks—including Objects and Fields, Object Portlets, Basic Processes, and XOG. In the last portion of this class we will walk through the high-level data model within the Clarity PPM database and walk through some basic NSQL portlets. This is a more technical class focusing on basic configurations - designed for non-technical people (especially the last 3 hours of the day)
Administration Beginner - RegoU 2018	EX1549	Presentation	theWorX	Learn basic administrative tasks in this basic administration Clarity PPM training, which includes setting up resources, security groups, OBSs, lookups, time reporting periods, fiscal time periods, calendars, jobs, and timeslices. These activities are focused on ongoing support vs. new configuration.
Administraton | Advanced XOG - RegoU 2016	EX1125	Presentation	theWorX	A RegoU 2016 presentation on the use of XML Open Gateway, aka XOG, within Clarity PPM. The course covers an introduction to XOG, system requirements, installation and setup, XOG files and procedure, Best Practices, and other XOG methods and XML creation.
Adminstration | Beginner	EX1406	Presentation	theWorX	Course description: "Learn administrative tasks and best practices in this basic administration Clarity PPM training, which includes setting up resources, security groups, OBSs, lookups, time reporting periods, fiscal time periods, calendars, jobs, and timeslices." Download file is the presentation slide deck.
Adoption and Perception | Strategies - RegoU 2018	EX1471	Presentation	theBasiX	Do you need to increase user adoption? Participate in this interactive discussion on the best practices for energizing your user base and increasing Clarity PPM value perception.
Adoption and Perception Strategies	EX1323	Presentation	theBasix	The course description for this 2017 RegoU class. "Do you need to increase user adoption? Participate in this interactive discussion on the best practices for energizing your user base and increasing Clarity PPM value perception." The download is the presentation deck used during class.
Adoption and Perception Strategies - RegoU 2016	EX1129	Presentation	theBasiX	A RegoU 2016 course that served as a facilitated discussion around User Adoption. The document provides a framework for the discussion but does not contain any details or notes around what was discussed. The outline does define what adoption is, provides several keys to success with examples.
Adoption Metrics	EX0937	Configuration Module	theBasiX	Rego's Clarity PPM Adoption Metrics package consists of two sets of metrics: Project metrics, and Resource metrics. Project metrics measure how effectively project managers are using Clarity PPM to manage their projects. Resource metrics measure how effectively resource managers are using Clarity PPM to manage resources. Metrics are scored on a scale of 0 to 5, with higher scores indicating greater adoption and use. All metrics can be viewed numerically or graphically, and can be broken out by OBS. In addition, metric data can display as a 12-month rolling history to help identify trends. Project metrics can also display by lowest / highest adoption rates for a specific resource metric or all resource metrics. There is a variety of way to view the Adoption Metric data, therefore, Rego has made this simple by creating an Adoption Metrics object that contains multiple tabs. Each tab displays one or more of the Project or Resource Adoption Metrics. Based on the nature of the Metrics some tabs will allow the ability to use a pull down menu to select a specific Adoption Metric. There is also a Metrics trending view that pulls monthly snapshots of the metrics. For more information, a CA Webinar on the topic can be found at - http://www.ca.com/us/lpg/webcast-series/ca-service-and-portfolio-management-insights.as

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Adoption Metrics - Content Files	EX1412	Configuration &	theWorX	Rego's Clarity Adoption Metrics package consists of two sets of metrics: Project metrics, and Resource metrics. Project metrics measure how effectively project managers are using Clarity to manage their projects. Resource metrics measure how effectively resource managers are using Clarity to manage resources. Metrics are scored on a scale of 0 to 5, with higher scores indicating greater adoption and use. All metrics can be viewed numerically or graphically, and can be broken out by OBS. In addition, metric data can display as a 12-month rolling history to help identify trends. Project metrics can also display by lowest / highest adoption rates for a specific resource metric or all resource metrics. There is a variety of way to view the Adoption Metric data, therefore, Rego has made this simple by creating an Adoption Metrics object that contains multiple tabs. Each tab displays one or more of the Project or Resource Adoption Metrics. Based on the nature of the Metrics some tabs will allow the ability to use a pull down menu to select a specific Adoption Metric. There is also a Metrics trending view that pulls monthly snapshots of the metrics.
Advance Your Portfolio Views Now - Meisterplan - Webinar	EX1223	Presentation	theBasiX	If you're looking for a dynamic portfolio solution, you won't want to miss this Meisterplan demo with Rego favorites Jen Scarlato and Josh Leone. They'll give you an inside view of this Clarity PPM portfolio add-on that allows you to prioritize, select, and govern Portfolios based on strong metrics and reporting. Your questions are welcome and encouraged. To view the webinar, click here – http://event.on24.com/wcc/r/1164418/43A64B21EB5DBC02171105E6EEEA94E3
Advanced Data Model Accessible Data - RegoU15	EX1039	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of Advanced Data Model: Accessible Data. It starts with an overview of Data Model then gets into Database Navigation, Frequently Accessed Areas (Timeslices, OBS) and then concludes with Clarity PPM Database Content (portfolio contents, financial plans & financial actuals, hierarchy, and idea to project).
Advanced Data Model: RegoU February 2014	EX0821	Presentation	theBasiX	RegoU Presentation from February 2014. Are you using tables to create advanced queries? This rarely used strategy provides valuable data while enhancing your productivity. Come to this session prepared to explore Clarity PPM data models and learn how to set up tables for advanced queries.
Advanced GEL Scripts Enhanced Functionality and Integration - RegoU15	EX1040	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of Advanced GEL Scripts: Enhanced Functionality & Integration. The presentation starts with SOAP / XOG and then moves on to File Operations, an Integrations Overview, and then concludes with examples and exercises.
Advanced Maximizing Portet Function to Personalize Output - RegoU15	EX1041	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of Advanced Maximizing Portlet Function to Personalize Output. The presentation covers advanced portlet types (multi-dimensional & hierarchical). Then gets into the syntax and a how to walkthrough for each type.
Advanced Portfolio Analytics | Overview	EX1324	Presentation	theBasix	The following is the RegoUniversity 2017 course description. "More companies are looking to do advanced portfolio analytics. Some of this can be done within Clarity PPM, but tools built for just this purpose have started to surface as well. In this class, we will discuss some portfolio analytic use cases and show what can be done within Clarity PPM alone and with add-on products—Decision Lens and Meisterplan." The download is the presentation deck.
Advanced Portfolio Analytics | Overview - regoU 2016	EX1230	Presentation	theBasiX	More companies are looking to do advanced portfolio analytics. Some of this can be done within Clarity PPM, but tools built for just this purpose have started to surface as well. In this class, we will discuss some portfolio analytic use cases and show what can be done within Clarity PPM as well as show some add-on products that could be used - decision lens and Meisterplan.
Agile | Best Practices Round Table - RegoU 2016	EX1130	Presentation	theBasiX	A outline of possible topics to be discussed in a Round Table on Agile Best Practices.
Agile | Birds of a Feather	EX1325	Presentation	theBasiX	This was a round table discussion around Agile methodology that took place at RegoUniversity 2017. The class description was as follows. "Agile methods continue to be more pervasive in organizations as stakeholders experience its value first-hand. However, the road is not always easy and is sometimes hindered by speed bumps. In this session, you will have the opportunity to discuss your Agile implementation experiences with your peers. You will leave with the knowledge of some common pitfalls to avoid or opportunities to take advantage of as it relates to your Agile initiatives." The file download is the slide deck that was used for the discussion.

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Agile | Transformation and Delivery	EX1326	Presentation	theBasix	This is a course from the 2017 RegoUniversity. The following is the class description. “Agile is here to stay, but waterfall may be as well. Companies around the world struggle with living in a bimodal development world, while trying to go through an agile transformation. This session will be a 1/2 day working sessions to discuss best practices and lessons learned within companies that have gone through agile transformations. We will also review SAFe as a potential approach.” The download is the slide deck used for the class.
Agile Integrations | Technical Deep Dive	EX1327	Presentation	theBasix	The following description is from a class taught at RegoU 2017. “Are you investigating an agile to Clarity PPM integration? This session will dive deep into the code base on Rego's standard agile connectors and explain how to leverage the data and processes between Clarity PPM and your agile tool.” The download is the presentation deck used during the class.
Agile Management | Best Practices - RegoU 2016	EX1131	Presentation	theBasiX	Are you struggling with implementing Agile work processes in your organization? This RegoU 2016 class reviews best practices for implementing agile within traditionally waterfall organizations. This is mainly a process and deployment class, but also discusses how Clarity PPM can be used to govern both types of work and teams and how Agile tools should interface into Clarity PPM.
Agile Management | Integration Best Practices	EX1328	Presentation	theBasix	A class from RegoU 2017. The following is the course description. “Are you struggling with implementing Agile work processes in your organization? This class review best practices for implementing agile within traditionally waterfall organizations. This is mainly a process and deployment class, but we discuss how Clarity PPM can be used to govern both types of work and teams and how Agile tools should interface into Clarity PPM.” Download is the slide deck from the presentation.
Agile Management: Best Practices - Webinar	EX1610	Presentation	theBasiX	Are you still struggling with implementing Agile work processes in your organization? This class will review best practices for implementing Agile within traditionally waterfall organizations. This is mainly a process and deployment class, but we will discuss how Clarity PPM can be used to govern both types of work and teams, and how Agile tools should interface into Clarity PPM.
Agile Primer	EX1330	Presentation	theBasix	A RegoU 2017 Presentation. The course description follows. “Would you like to get an overview of the fundamentals of Agile? This session will dispel the misconceptions of Agile and provide an understanding and definition of terms such as “bi-modal”, “Scrum”, “Kanban”, “weighted shortest job first” and “SAFe”. We will also talk about how Clarity PPM fits into the Agile discussion and provide thoughts and practices on how PMOs are responding to this trending methodology.” Download is the presentation slide deck.
Agile Primer - RegoU 2018	EX1472	Presentation	theBasiX	Would you like to get an overview of the fundamentals of Agile? This session will dispel the misconceptions of Agile and provide an understanding and definition of terms such as “bi-modal”, “Scrum”, “Kanban”, “weighted shortest job first” and “SAFe”. We will also talk about how Clarity PPM fits into the Agile discussion and provide thoughts and practices on how PMOs are responding to this trending methodology.
Agile Process and the Role of Clarity PPM in the IT Ecosystem: RegoU 2015	EX1013	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of Agile Process & the Role of Clarity PPM in the IT Ecosystem of Tools. The presentation covers integration: yes or no, what data should be in Clarity PPM, Source of Truth, Governance Tool Ecosystem, Common Integrations, best practices for building integrations, and Agile and Clarity PPM.
Agile Process and the Role of Clarity PPM in the IT Ecosystem: RegoU February 2014	EX0823	Presentation	theBasiX	RegoU Presentation from February 2014. Have you wondered what role Clarity PPM plays with other systems of record in your organization? Also, more companies are moving a portion of their development work to an agile process and in some cases agile tools. This session is directed at Clarity PPM’s ability to work in harmony with other management systems, including the systems that manage assets, applications, finance, quality and defects, and incidents and problems. Rego’s team will also provide you with an overview of the agile process, introduce key terms, and review of how these processes and tools can integrate with Clarity PPM.
Agile Transformation | What to Expect - RegoU 2018	EX1473	Presentation	theBasiX	Agile is here to stay, but waterfall may be as well. Companies around the world struggle with living in a bimodal development world, while trying to go through an agile transformation. This session will be a 1/2 day working sessions to discuss best practices and lessons learned within companies that have gone through agile transformations. We will also review SAFe as a potential approach.

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Align Projects with your Strategic Plan - Webinar	EX1600	Presentation	theBasiX	More projects. More demands. Shorter Timelines. Slim budgets. Align projects with the organization's strategic plan. Nearly 80% of project management executives don't know how their projects align with the company's business strategy But there is a way for Clarity PPM user to fix that. Join us where you will learn about TransparentChoice and data-driven project prioritization software. Steve Beaumont from TransparentChoice and Josh Leone from Rego Consulting will discuss TransparentChoice can: - Identify projects that add the most business value. - Uncover wasted recources. - Identify strategic alignment of projects with business goals and integrate with Clarity PPM.
All Action Items	EX1303	Portlet	theBasiX	The All Action Items portlet provides detail on all actions items, including the name, type, assignee, status, due date, health indicator and creator of the action item. The portlet can be filtered by project, assignee, AI status, and due date range.
All Assignments	EX0008	Portlet	theBasiX	The All Assignments portlet displays resource assignments across multiple projects. Currently, assignment information displayed for the project, in OWB, or MSP is limited to a single project. This portlet will provide a single view of the assigned data for all assignments across multiple projects. The portlet displays project actuals and estimates from the project (datamart tables). The Days Late field is calculated by the baseline date, while the Days Old field is calculated by today's date. Note: Only the projects that the user has viewer rights to will show up in the list. Filters provide the PM, RM, and individual resource the ability to monitor work progress across multiple projects. For example: ~ PMs can filter for all assignments that were to be completed by a given date but still have "Started" or "Not Started" status. ~ If multiple projects are utilizing the same resource, the PM or RM can filter for assignments utilizing that specific resource to prevent over-utilization. ~ A resource may filter for all assignments assigned to them, providing a picture of their total body of work.
All Assignments - Power BI	EX1579	Report	theWorX	All Assignments report provides project managers a single place to view KPIs related to Task Assignments. All the KPIs are depicted in various visualizations. Total Actuals: Scorecard that displays the sum of actuals associated with assignments for the selected criteria. Remaining ETC: Scorecard that displays the sum of current ETC associated with assignments for the selected criteria. Top 5 Roles (Total Effort): Column chart that displays Effort (Actuals + ETC) by Roles. X axis displays various Roles. Data labels indicate sum of effort associated with that Role. Actuals by OBS level 2: Column chart that displays Actuals by OBS level 2. X axis displays various OBS level 2. Data labels indicate sum of actuals associated with that OBS. Grid: Displays Assignment details such as Project ID, Project Name, Task Name, Task Status, Assigned Resource, Assignment Status, Assignment Start, Assignment Finish, Actuals, ETC, Total Effort, Days Late and Days Old. You can further narrow your search by OBS Type, OBS Path, Project(s) and Project Manager.
All Assignments (JS Report)	EX1451	Report	theWorX	All Assignments report provides the Managers a single place to view all the assignments associated with a project(s). User can view only the investments that he has access to. This report also displays ETC, Actuals, Total Effort, Days Old (Elapsed days between Task Finish Date and Today's Date), Days Late (Elapsed days between Task Finish date and Task Baseline Finish date) associated with the task. You can further narrow your search by OBS Type & Path, Resource Name , Project Manager, Project Name, Project ID, Is project Active?, Assignment Start Date, Assignment Finish Date, Assignment Status and Task Status.

Name	ID	Work Type	Location	Long Description
All Change Requests	EX0009	Portlet	theBasiX	The All Change Request portlet displays all change requests related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view change requests across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The filter allows the user to narrow their search by date ranges, resources involved, and/or the project with which the Change Request is associated. Other alternatives for filtering include the category, priority or status of the Change Request. In the list view, a status is displayed for each Change Request (CR), along with the Project with which the CR is associated, the CR ID, the CR name, the resource to whom the CR is assigned, Priority, Expected Closure Date, and number of days the CR has remained open. Note: Only the projects that the user has viewer rights to will show up in the list.
All Change Requests - Power BI	EX1611	Report	theWorX	All Change Requests report provides project managers a single place to view KPIs related to Change Requests. All the KPIs are depicted in various visualizations. Change Request Count: Scorecard that displays the # of Change Requests for the selected criteria. Change Request by Priority: Column chart that displays # of Change Request by Priority. X axis displays various Change Request priority. Data labels indicate the number of Change Request associated with that category. Change Request Status: Column chart that displays # of Change Request by Status. X axis displays various Status. Data labels indicate the number of Change Request associated with that Status. Grid: Displays Change Request details such as Investment ID, Investment Name, Investment Manager, Change Request ID, Change Request Name, Status, Priority and Expected Close Date. You can further narrow your search by Expected Close Date Range, OBS Type and OBS Path.
All Change Requests (JS Report)	EX1434	Report	theWorX	All Change Requests report provides the project manager a single place to view change requests across multiple projects. This report displays Project Information such as ID & Name, Change Request Information such as its ID, Name, Category, Owner, Status, Priority, Expected Close Date and Days Open. You can further narrow your search by OBS Type & Path, Change Request Status, Change Request Name, Change Request Category, Change Request Owner, Project Name and Project Manager.
All Incidents	EX0010	Portlet	theBasiX	The All Incidents portlet shows all Incidents the user has view rights on and provides a single view to increase ease of management. Status indicators provide a quick overview of incident statuses so a user may prioritize. The filter then allows the user to narrow their search using date ranges and/or resources assigned. Other alternatives for filtering include the status, urgency, priority or impact of the Incident.
All Issues	EX0011	Portlet	theBasiX	The All Issues portlet displays all Issues related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view issues across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The filter then allows the user to narrow their search by Issue ID, Issue Name, Project ID, Project Name, the individual to whom the issue is assigned, and Issue Status. You may also narrow the view to display issues with a target resolution date within a certain date range, or Issues associated with a particular Category or OBS unit. Note: Only the projects that the user has viewer rights to will show up in the list.

Name	ID	Work Type	Location	Long Description
All Issues - Power BI	EX1613	Report	theWorX	All Issues report provides project managers a single place to view KPIs related to Issues. All the KPIs are depicted in various visualizations. Open Issues: Scorecard that displays the # of Issues that are not closed or resolved. Average Days Open: Scorecard that displays the # of days on an average an issue is in open state. Issue category: Column chart that displays # of Issues by category. X axis displays various Issue categories. Data labels indicate the number of Issues associated with that category. Issue Priority: Column chart that displays # of Issues by priority. X axis displays various Issue priority. Data labels indicate the number of Issues associated with that priority. Grid: Displays Issue details such as Project ID, Project, Issue ID, Issue, Category, Assigned To, Status, Priority, Target Resolution Date and Days Open. You can further narrow your search by OBS Type, OBS Path, Project(s) and Project Manager.
All Issues (JS Report)	EX1453	Report	theWorX	All Issues report provides the Project Managers a single place to view all the Issues across multiple projects. User can view only the projects that he has access to. This report provides Issue information such as ID, Name, Category, Assigned To, Status, Priority, Target Resolution Date and Days Open (# of days Issue is open). User can further narrow their search by OBS Type & Path, Issue Name, Project Name, Project ID, Is Project Active?, Issue Owner, Issue Status, Issue Target Resolution Date, Issue Category and Issue Priority.
All Lookups and Attributes	EX0893	Portlet	theWorX	The All Lookups and Attributes portlet provides the ability to see all static lookups in the system, as well as their lookup values. Ability to filter and view the population by lookup name and ID, value name and ID, whether or not the item is active, and whether or not the item is a system (seeded) value. A system value is a record that comes with a base installation of Clarity PPM as opposed to a value that was added manually or through a Clarity PPM Add-in.
All Risks	EX0012	Portlet	theBasiX	The All Risks portlet displays all risks related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view risks across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The portlet displays Project ID, Project, Risk ID, Risk, Category, Assigned to, Status, Probability, Impact, Priority, Target Resolution Date, and Days opened. The filter allows narrowing down of the risks by several different criteria. Note: Only the projects that the user has viewer rights to will show up in the list.
All Risks - Power BI	EX1614	Report	theWorX	All Risks report provides project managers a single place to view KPIs related to Risks. All the KPIs are depicted in various visualizations. Risk Count: Scorecard that displays the # of Risks for the selected criteria. Risk Priority: Column chart that displays # of Risks by Priority. X axis displays various Risk Priorities. Data labels indicate the number of Risks associated with that category. Risk by Status: Column chart that displays # of Risks by Status. X axis displays various Risk statuses. Data labels indicate the number of Risks associated with that status. Risk by Target Resolution Date: Column chart that displays # of Risks by year of Target Resolution Date. X axis displays Year. Data labels indicate the number of Risks associated with that category. Grid: Displays Risk details such as Investment ID, Investment Name, Investment Manager, Risk ID, Risk Name, Owner, Status, Priority and Target Resolution Date. You can further narrow your search by OBS Type, OBS Path and Target Resolution Date range.

Name	ID	Work Type	Location	Long Description
All Risks (JS Report)	EX1432	Report	theWorX	All Risks report provides the project manager a single place to view risks across multiple projects. This report displays Project Information such as ID & Name, Risk Information such as its ID, Category, Owner, Status, Probability, Impact, Priority, Created Date, Target Resolution Date & Days Open. You can further narrow your search by Risk Status, Risk Name, Risk Category, Risk Impact, Risk Priority, Risk Owner, Project Name and Project Manager.
All Skills	EX0013	Portlet	theBasiX	The All Skills portlet displays active skills available in the skills hierarchy, thus providing visibility to these values, without requiring administrative rights to be granted to the user. Viewing the skills list together in one view will allow the user to easily determine which skills they wish to add to their profile. The user may filter by Skill Name, or for skills associated with a particular parent skill.
All Status Reports	EX0014	Portlet	theBasiX	The All Status Reports portlet displays any published Status Report related to a project or across multiple projects. The filter then allows the user to narrow their search by Project Manager, Project, Status or Overall Status Category (overall, cost & effort, scope or schedule). The user may also select if they wish to view only current Status Reports, or to include historical reports as well. The portlet provides the project manager a single place to view all of the status reports without having to go into each project individually, and allows for more efficient management and reporting across projects. Note: Only the projects that the user has view rights to will show up in the list.
All Status Reports - JS Report	EX1646	Report	theWorX	All Status Reports is a grid report that provides project managers a single place to current status report for a single project or across multiple projects. This report provides project information such as ID, Name, Manager, Status, Status report KPI’s (Report overall status, Cost and Effort status, Schedule status & Scope Status) and Portfolio Name. You can further narrow your search by OBS Type, OBS Path, Project Name, Project Manager, Status, Overall Status and Portfolio Name.
All Status Reports - JS Report	EX1648	Report	theWorX	All Status Reports is a grid report that provides project managers a single place to current status report for a single project or across multiple projects. This report provides project information such as ID, Name, Manager, Status, Status report KPI’s (Report overall status, Cost and Effort status, Schedule status & Scope Status) and Portfolio Name. You can further narrow your search by OBS Type, OBS Path, Project Name, Project Manager, Status, Overall Status and Portfolio Name.
All Status Reports - PBI	EX1634	Report	theWorX	All Status report provides project managers a single place to view KPIs related to Status Reports. All the KPIs are depicted in various visualizations. -Status Report Count: Scorecard that displays the # of Status Reports for the selected criteria. -Status Report by Cost Effort Status: Column chart that displays # of Status Reports by Cost Effort. X axis displays various Cost Effort Status. Data labels indicate the number of Status Reports associated with that category. -Status Report by Schedule Status: Column chart that displays # of Status Reports by Schedule Status. X axis displays various Schedule statuses. Data labels indicate the number of Status Reports associated with that status. -Status Report by Scope Status: Column chart that displays # of Status Reports by -Scope Status. X axis displays various Scope statuses. Data labels indicate the number of Status Reports associated with that status. -Grid: Displays Status Report details such as Investment ID, Investment Name, Report Name, Report ID, Overall Status, Cost Effort, Schedule Status and Scope Status. You can further narrow your search by OBS Type, OBS Path and Report Date range

Name	ID	Work Type	Location	Long Description
All Tasks	EX0015	Portlet	theBasiX	The All Tasks portlet displays all tasks related to active projects that the logged in user has view rights to. The portlet provides the project manager a single place to view tasks across multiple projects without having to go into each project individually, and allows for more efficient management and reporting across projects. The portlet displays project actuals and estimates from the project (datamart tables). The portlet allows analysis like: ~ PMs may have several critical tasks that were supposed to start on a certain date. To verify progress, they filter for that start date to perform a review of the tasks. ~ PMs may have resources that could leave the project. They can review their tasks and identify which need to be reassigned. ~PMs can review days late to see how tasks are doing against the baseline date (<7 days is green, 7-14 is yellow, and >14 is red) ~PMs can review days old to see how tasks are doing against today's date (<7 days is green, 7-14 is yellow, and >14 is red)
All Tasks (JS Report)	EX1452	Report	theWorX	All Tasks report provides the Project Managers a single place to view all the tasks associated with a project(s). User can view only the investments that he has access. Project Managers can use this report to view the progress of the tasks and check how the tasks are performing against baseline date. User can further narrow their search by OBS Type & Path, Investment Name, Month Start Date and Is Project Active?.
Allocate from Estimates QRC	EX1306	Training Document	theBasiX	A Quick Reference Card to assist in the use of the Allocate from Estimates functionality. Use Allocate from Estimates when you have updated ETCs for your resources and you want to update the planned allocation to match. This calculation only impacts the portion of the allocation that is after the resource actuals through date.
Allocation Complance Pie Chart Drilldown Enhancement	EX1214	Portlet	theWorX	This Allocation Compliance Drilldown Enhancement portlet is used in conjunction with the Allocation Compliance Pie Chart. Once the user selects a specific section of the chart, the Allocation Compliance Drilldown Enhancement will display a list of resources fulfilling that selection. The Allocation Compliance list portlet shows the Resource Name, the Resource Manager, Availability, Allocated Hours and Allocation % for the selection. Note: The Allocation compliance pie chart is displayed first based on the filter selection i.e., Start Date, End Date and OBS. The pie chart is displayed as per the following three slices of the pie: Under Allocated (Less than 80%) Appropriately Allocated (Between 80-120%) Over Allocated (Above 120%) The slice of a pie can be clicked to display resource allocation compliance information in the Allocation Compliance List portlet, as described earlier. Screenshot 1 shows the chart before a section being clicked. Screenshot 2 shows the expansion with the grid for the Appropriately Allocated section.
Allocation Compliance by Month Area Chart (JS Report)	EX1441	Report	theWorX	Allocation Compliance Area Chart provides the resource manager a single place to view the Monthly Resource Allocation compliance for all resources in the form of an Area chart. Allocation Compliance is calculated based on the value of 'Availability to Allocation Hours %'. Allocation Compliance is 'Under Allocated (Less Than 80%)' WHEN 'Availability to Allocation Hours %' is less than 80 Allocation Compliance is 'Appropriately Allocated (Between 80-120%)' WHEN 'Availability to Allocation Hours %' is between 80 and 120 Allocation Compliance is 'Over Allocated (Over 120%)' WHEN 'Availability to Allocation Hours %' is greater than 120 User can further narrow their search by Resource Is Active?, OBS Type, OBS Path and Month Start Date. User can use exact dates or relative dates for Month Start Date filter parameter.

Name	ID	Work Type	Location	Long Description
Allocation Compliance by Month Pie Chart (JS Report)	EX1442	Report	theWorX	Allocation Compliance Pie Chart provides the resource manager a single place to view the Monthly Resource Allocation compliance for all resources in the form of a Pie chart. A separate Pie chart is displayed for each month. Allocation Compliance is calculated based on the value of 'Availability to Allocation Hours %'. Allocation Compliance is 'Under Allocated (Less Than 80%)' WHEN 'Availability to Allocation Hours %' is less than 80. Allocation Compliance is 'Appropriately Allocated (Between 80-120%)' WHEN 'Availability to Allocation Hours %' is between 80 and 120. Allocation Compliance is 'Over Allocated (Over 120%)' WHEN 'Availability to Allocation Hours %' is greater than 120. User can further narrow their search by Resource Is Active? , OBS Type, OBS Path and Month Start Date. User can use exact dates or relative dates for Month Start Date filter parameter.
Allocation Compliance by PM - Power BI	EX1662	Report	theWorX	Allocation Compliance by PM report provides project managers a single place to view Available hours, Allocation Hours and Allocation Percentage of Investment Team Resources. It considers the investments of selected project manager and it displays the following: Allocation Details Grid: Displays Resource and its Allocated hours, Available hours and Allocation percentage (Allocated hours/Available Hours) Allocation Percent by Resource: Column chart that displays Allocation Percentage for various resources during the selected Time frame. You can further narrow your search by Project Manager & Month Start Date range.
Allocation Compliance by RM - Power BI	EX1663	Report	theWorX	Allocation Compliance by RM report provides resource managers a single place to view Available hours, Allocation Hours and Allocation Percentage of Resources. It considers the resources of selected resource manager and it displays the following: Allocation Details Grid: Displays Resource and its Allocated hours, Available hours and Allocation percentage (Allocated hours/Available Hours) Allocation Percent by Resource: Bar chart that displays Allocation Percentage (top 10) for various resources during the selected Time frame. You can further narrow your search by Resource Manager & Month Start Date range.
Allocation Compliance Column Chart	EX0016	Portlet	theBasiX	The Allocation Compliance Column Chart portlet displays allocation compliance information for all resources within a given OBS - showing one column for each child OBS of the OBS selected. The portlet displays information in three ways: Under Allocated (less than 80%), Appropriately Allocated (between 80-120%), and Over Allocation (over 120%). Using this portlet, resource managers or the PMO will be able to glance at the chart and determine how a majority of their resources are allocated.
Allocation Compliance Column Chart - Power BI	EX1664	Report	theWorX	Allocation Compliance Column Chart report provides resource managers a single place to view Allocation compliance for various resources. It displays the following: Allocated Hours by OBS chart: Stacked Column chart that displays percentage of resources that are fully allocated (80 -120 %) and under allocated (less than 80%) for a particular OBS and selected period range. Grid: Displays Resource Name, Resource Id, Primary Role, Booking Manager, Period, Allocated hours and Actual hours during that period. You can further narrow your search by OBS Type, OBS Path & Period Start Date range.

Name	ID	Work Type	Location	Long Description
Allocation Compliance Column Chart (JS Report)	EX1469	Report	theWorX	Allocation Compliance Column Chart provides the resource manager a single place to view the Allocation compliance information in the form of a stacked column chart. Allocation Compliance is calculated based on the value of 'Availability to Allocation Hours %'. Allocation Compliance is 'Under Allocated (Less Than 80%)' WHEN 'Availability to Allocation Hours %' is less than 80. Allocation Compliance is 'Appropriately Allocated (Between 80-120%)' WHEN 'Availability to Allocation Hours %' is between 80 and 120. Allocation Compliance is 'Over Allocated (Over 120%)' WHEN 'Availability to Allocation Hours %' is greater than 120. User can further narrow their search by Resource Is Active?, OBS Type & Path, Associated Project OBS?, Allocation Start Date, Investment Name and Resource Manager. User can use exact dates or relative dates for Allocation Start Date filter parameter.
Allocation Compliance for PM	EX0017	Portlet	theWorX	The Allocation Compliance by Person (Project Manager) portlet gives a view of resource allocation compliance for active resources on the team of an investment the logged in user is the manager for. It allows the PM to see resources on their project over the coming months and whether they are over or under allocated. This portlet leverages the daily allocation and daily availability slices as well as only active investments. The portlet provides filters for specific dates, filtering by resource ID, and resource name may also be added.
Allocation Compliance for PM (JS Report)	EX1428	Report	theWorX	Allocation Compliance for PM report gives a view of resource Allocation percentage for active resources on the team of an investment for a selected Investment Manager. It allows the PM to see resources on their project over the coming months and whether they are over or under allocated. Allocation Percentage is calculated as ('Allocated Hours' / 'Available Hours') * 100. User can further narrow their search Month Start Date and Investment Manager. User can use exact dates or relative dates for Month Start Date filter parameter.
Allocation Compliance for RM	EX0018	Portlet	theWorX	The Allocation Compliance by Resource (Resource Manager) portlet gives a view of resource allocation compliance for all active resources the logged in user is the Resource Manager for. It allows the RM to see resources they manage over the coming months and whether they are over or under allocated. This portlet leverages the daily allocation and daily availability slices as well as only active investments. The portlet provides filters for specific dates, filtering by resource ID, and resource name may also be added.
Allocation Compliance Pie Chart	EX0019	Portlet	theBasiX	The Allocation Compliance Pie Chart portlet gives a view of active resource allocation compliance for all resources displayed in a pie chart. It allows the user to the percentage of resources over, under, and adequately staffed on projects over a selected time period. This portlet leverages the daily allocation and daily availability slices as well as only active investments. The portlet provides filters for specific dates (required) and OBS.
Allocation Compliance Pie Chart - Power BI	EX1665	Report	theWorX	Allocation Compliance Pie Chart report provides resource managers a single place to view Allocation compliance for various resources. It displays the following: Allocated Hours by OBS chart: Pie chart that displays percentage of resources that are fully allocated (80 -120 %) and under allocated (less than 80%) for a particular OBS and selected period range. Grid: Displays Resource Name, Resource Id, Primary Role, Booking Manager, Period, Allocated hours and Actual hours during that period. You can further narrow your search by OBS Type, OBS Path & Period Date range.

Name	ID	Work Type	Location	Long Description
Allocation Compliance Pie Chart (JS Report)	EX1427	Report	theWorX	Allocation Compliance Pie Chart provides the resource manager a single place to view the Allocation compliance information in the form of a Pie chart. Allocation Compliance is calculated based on the value of 'Availability to Allocation Hours %'. Allocation Compliance is 'Under Allocated (Less Than 80%)' WHEN 'Availability to Allocation Hours %' is less than 80. Allocation Compliance is 'Appropriately Allocated (Between 80-120%)' WHEN 'Availability to Allocation Hours %' is between 80 and 120. Allocation Compliance is 'Over Allocated (Over 120%)' WHEN 'Availability to Allocation Hours %' is greater than 120. User can further narrow their search by Resource Is Active?, OBS Type, OBS Path, Allocation Start Date, Investment Name and Resource Manager. User can use exact dates or relative dates for Allocation Start Date filter parameter.
Allocation Confirmation Notification	EX1089	Workflow Job	theWorX	A process run via Execute a Process job, which sends an email to active resources, containing a facsimile of their Resource Allocation Detail page. It shows the next six weeks of allocations by investment, with a column total. The email also contains a click here link to this page in Clarity PPM, to enable editing of the data, as appropriate.
Allocation Using Team Tab Detail QRC	EX1307	Training Document	theBasiX	A Quick Reference Card to assist in allocations to projects using the Team Tab: Detail (drop down menu item). This screen displays the resource's allocation in a time scaled grid and can be easily updated using in-line editing.
Allocations by Program - Weekly Detail	EX1102	Portlet	theWorX	This is the same portlet as the out of the box Weekly Detail with an additional filter element for Program (multiple select). Portlet displays resource allocations graphically for each project in the specified program(s), for the next six weekly periods. Portlet filterable by numerous project, resource, and assignment attributes. Graphical representation shows Resource Availability Threshold and Allocation in hours, as a mouse-over.
Allow PM to Give Certain Rights	EX0382	Configuration Module	theWorX	The Allow PM to Give Certain Rights modification allows the project manager to delegate rights (chosen by the administrator on the PM Rights object) on his or her projects. This modification eliminates the need for project managers to request additional rights through the PMO/management and simplifies the entire process for everyone involved. The system administrator is able to customize the PM Rights object to pick which rights should be granted to users by the process. The process begins when a change is made on the newly created "Grant / Revoke" field on the project object. The process will then grant or revoke (depending on what option is selected) any rights listed in the PM Rights object to the user in the "Assign PM Rights" field on the project object.
Annual Planning - Webinar	EX1605	Presentation	theBasiX	In the rapidly evolving IT organization, Financial Planning has never been more necessary. Explore how to enable an IT-Centric planning process, and learn how the foundational improvements that are critical for your success.
Annual Planning | Challenges & Opportunities for the Modern IT Organization	EX1331	Presentation	theBasix	A presentation from the 2017 Rego University, the course description is as follows. "Are you trying to implement a multi-year roadmap, but struggle to know how to effectively plan for current fiscal year and future years at the same time? This session will discuss best practices and highlight some companies that have successfully tackled the planning process."
APM | Why You Need It	EX1332	Presentation	theBasix	A presentation from RegoU 2017. Course Description - "Does your organization want to implement application portfolio management? Are you trying to determine the value in implementing APM? Are you struggling to know what tool you should use and what data is important to collect? This session will review specific use cases of companies that have implemented APM and effectively used the data to drive value for the organization. This session will also review some of the APM tools in the market, including ServiceNow and Clarity PPM." The download is the slide deck used during the presentation.
Application Cost by Goal	EX0228	Portlet	theWorX	The Application Cost by Goal portlet displays the planned cost of all active applications within a user-defined timeframe, summarized by goal in a pie chart. This portlet provides management with a quick overview of cost by goal within a year without navigating to each application individually.
Application Cost by Year	EX0179	Portlet	theWorX	The Application Cost by Year portlet displays the active application cost by year, summarized by goal. The application cost is pulled from the application's planned cost and is displayed by year, with colors representing each application goal. This portlet provides management with a quick overview of all application costs without having to navigate to each application individually.
Application Portfolio Management (APM) | Business Value - RegoU 2018	EX1474	Presentation	theBasiX	Does your organization want to implement application portfolio management? Are you trying to determine the value in implementing APM? Are you struggling to know what tool you should use and what data is important to collect? This session will review specific use cases of companies that have implemented APM and effectively used the data to drive value for the organization.

Name	ID	Work Type	Location	Long Description
Application Risk by Goal	EX0178	Portlet	theWorX	The Application Risk by Goal portlet displays a count of active applications by goal with a subcount by risk. The graph is color-coded by risk rating: ~ 1-33 - Green ~ 34-66 - Yellow ~ 67-100 - Red The portlet provides a quick overview of the risk rating for each application within each goal.
Applications Portfolio Management | Best Practices - RegoU 2016	EX1132	Presentation	theBasiX	How do you manage and optimize your portfolio of applications? This RegoU 2016 class shows a proven process and configuration for collecting and maintaining application information. Learn about the factors we use to assess applications, the decision-making process, and how you can use Clarity PPM to govern the portfolio.
Approving and Converting Ideas QRC	EX1244	Training - Doc	theBasiX	A Quick Reference Card to assist in the approving/rejecting of Ideas. Included converting Ideas once approved.
Assign Management Right to Team Member	EX1094	Workflow	theWorX	This process grants Project Management instance rights to all of the project team members within the program hierarchy. Allows users to view management properties, roster and key tasks of the project. This also allows user view access to the project in Microsoft Project.
Assigning Resources to Task with ETC QRC	EX1308	Training Document	theBasiX	A Quick Reference Card to assist in the process of assigning resources to tasks using ETC. In some instances, Clarity PPM will prepopulate the ETC field using this process. This value is based on the allocation in hours calculated from the Team Tab for the task time period.
Assigning Resources Using the Gantt QRC	EX1309	Training Document	theBasiX	A Quick Reference Card to assist assigning resources to project tasks using Clarity PPM's Gantt. Note - You cannot enter ETCs for resources on the Gantt. It must be performed via the dialogue box.
Assignment and Utilizaiotn Views QRC	EX1310	Training Document	theBasiX	A Quick Reference Card that reviews the functionality of the Assignment and Resource Utilization Views. The document review these two menu items fund under the Project Task tab. In Assignment view you can view a list of role / resources assigned to a task. The Resource Utilization item shows the amount of resource effort it takes, or is expected to take, to complete a task.
Assignment by Task Over Time - PBI	EX1635	Report	theWorX	Assignments by Task Over Time report display all assignments by task for all resources. Information is displayed on monthly basis. This report displays Investment Name, Task Name, Resource Name and its monthly assignments. You can further narrow your search by OBS Type & Path, Investment Manager, Investment Name, and Year
Assignment by Task Over Time (JS Report)	EX1445	Report	theWorX	Assignments by Task Over Time report display all assignments by task for all resources. Information can be drilled down to yearly, quarterly or monthly level. This report helps in determining the tasks a user is assigned to or how many hours a user is assigned to a task. You can further narrow your search by OBS Type & Path, Project ID, Project Name, Task Name, Assignment Resource, Is project Active?, Is Template? And Month End date.
Assignments by Task Over Time	EX0021	Portlet	theWorX	The Assignments by Task Over Time portlet displays all assignments by task for all resources using the timeslices. This portlet is useful for determining which tasks a user is assigned to or how many hours the user is assigned to a task. The user may filter on certain criteria that include: project name/ID, date range, resource name/ID, and resource OBS unit.
Assignments Replacing Roles with Resources QRC	EX1311	Training Document	theBasiX	A Quick Reference Card to assign in the process of replacing roles with resources on assignments in Clarity PPM. Here are some of the conditions: • If a named resource has been identified to replace a role, or if a resource is no longer available to work on a project, you can replace the resource or role. • Task actuals remain with the original resource and remaining ETC's will transfer to the new resource. • You cannot remove a resource who has charged actuals from the team. • It is usually necessary to contact an individual's RM before adding the new resource to your team. • You can perform a replacement globally via the Team tab (using Resource Finder) or replace on individual tasks using the Assignments View and the Replace option, shown here.
At Risk Projects - BT	EX1107	Portlet	theBasiX	Part of the Business Transformation collection, this bar-chart portlet displays investments and (if exists) any child investments, which are at risk with regard to the schedule of the investments.
Attach Benefit Plan to a Cost Plan QRC	EX1299	Training Document	theBasiX	A quick reference card to assist you when you want to attached a Benefit Plan to a Cost Plan in Clarity PPM. Creating a benefit plan and associating it with a cost plan allows you to calculate ROI or NPV on an investment.
Attributes in Portlets	EX0804	Portlet	theWorX	The Attributes on Portlets allows the user to pull into a portlet all the attributes used on a specific portlet. This capability is helpful when creating data dictionaries (or other supporting documentation) or if user is trying to determine where a specific attribute can be viewed by end users.

Name	ID	Work Type	Location	Long Description
Audit Trail	EX0022	Portlet	theWorX	The Audit Trail portlet displays information about audited attributes. It is nearly identical to the view and functionality of the "Global Audit Trail" offering on the admin side. It offers filters for the Object ID (resource internal id, project internal id, etc.), Object Name (Jim Brown, Project A, etc.), Changed By, a date range for the changed date and the operation of the change. It is capable of reporting on the following: - Object (Resource, Project, etc.) - Object Name (Jim Brown, Project A, etc.) - Parent Name (if the object were a sub-object) - Attribute code (the attribute id from the attributes list on the object) - Operation (Update, Insert, Delete) - Changed By - Old Value - New Value - Date Changed.
Auto Approve Old Timesheets	EX0133	Workflow Job	theWorX	The Auto-Approve Old Timesheets workflow process can be run through the "Execute a Process" job, and may be used to quickly close out timesheets for a specified timeframe for period closure. The workflow will execute a query that will automatically approve ALL (no matter the status of the timesheet) timesheets that contain more than 0 hours and have a time period start date before the Approve Date specified within the process itself.
Automate Report Bursting in Clarity PPM - Webinar	EX1587	Presentation	theBasiX	Would you like to send reports automatically to key groups? - Send vendors their weekly hours - Send project managers their forecasted project burndowns You may remember using this functionality in Business Objects. Now with Clarity PPM, you can use one Report Bursting process to automatically create unique reports for specific users in dynamic lists.
Benefits by Year	EX0339	Portlet	theWorX	The Benefits by Year portlet displays all benefit plans within projects. The information is displayed by years, includes the cost associated cost plan, and may be used to view potential benefit over several years. The information may be filtered by date range, OBS, portfolio ID, or if the benefit plan is the plan of record.
Benefits by Year - PBI	EX1636	Report	theWorX	Benefits by year report provide the project manager a single place to view Benefit plan (Forecast /Budgeted) and its associated benefit for various years across multiple projects. Information is displayed in a bar graph and user can further drill down the details to investment level. Project Managers can use this report to analyze if the projects are giving intended benefits and take appropriate decisions accordingly. User can further narrow their search by OBS Type & Path, Plan Type (Budget/Forecast), Year and Is Plan of Record?.
Benefits by Year (JS Report)	EX1459	Report	theWorX	Benefits by year report provides the project manager a single place to view Benefit plan and its associated benefit for various years across multiple projects. Project Managers can use this report to analyze if the projects are giving intended benefits and take appropriate decisions accordingly. User can further narrow their search by OBS Type & Path, Investment Name, Investment Manager, Investment Type, Plan Type and Is Plan of Record?.
Best Practices for Clarity PPM Stage Gates - Webinar	EX1633	Presentation	theBasiX	Do you track Stage Gates within Clarity PPM (Clarity)? Would you like to automate that process? Today's webinar will help you master Stage Gates and Phase Gates. We'll show you sample processes, discuss configuration options, and cover the tracking choices you already have available out-of-the-box. We'll also reveal Rego's best practice approach to data tracking and workflow. Everyone does Stage Gates their own way. Join popular Rego Guides Jacob Cancelliere and Wes McCoubrie for an invigorating look at the pros and cons of our favorite options.
Best Practices in the Clarity PPM Dev Process - RegoU15	EX1025	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of Best Practices around the configuration and release of content into Clarity PPM. The presentation covers the definition of the development process, defining your dev process, Rego Best Practices, and challenges you might face.
Better Together - ITFM & PPM - Part 1 - Webinar	EX1591	Presentation	theBasiX	For many organizations, Technology has moved so far beyond business enablement that it has become the business core. To get a seat at the table, CIOs of such organizations run IT like a business. How do they do it? One of the keys is robust IT Financial Management (ITFM) that dovetails into Project and Portfolio Management. Join Rego's senior consultants Josh Leone, Dave Wachsmann, and Doug Greer to learn ITFM solutions (strategies, methodologies, and tools) for managing your cost, quality and value of your IT service.
Beyond IT | Executive Selling & Business Transformation	EX1333	Presentation	theBasix	The course description for the 2017 RegoU class – " Are you considering expanding Clarity PPM from the IT realm into the business realm? This class will show you how other organizations use Clarity PPM for all initiatives with some exciting new CA/Rego content packs. We will also discuss an approach you can use to sell Clarity PPM as an enterprise platform." Download is the slide deck used during the presentation.

Name	ID	Work Type	Location	Long Description
Beyond IT | Executive Selling and Business Transformation - RegoU 2016	EX1133	Presentation	theBasiX	Are you considering expanding Clarity PPM from the IT realm into the business realm? This class will show you how other organizations use Clarity PPM for all initiatives with some exciting new CA/Rego content packs. We will also discuss an approach you can use to sell Clarity PPM as an enterprise platform.
BI Tools - PowerBI and Tableau | Introduction	EX1334	Presentation	theBasix	Introduction to Power BI and its components * Getting Data * Mockup – PM and RM Dashboard * Publishing and Sharing * Best practices and its limitations * Tableau Introduction
BiModal PPM - Webinar	EX1606	Presentation	theBasiX	Agile. Waterfall. Bimodal. Really? Yes - Agile and Waterfall can co-exist and provide significant value to an organization when done properly. Join Rob Greca, Agile Guru at Rego, for a Bimodal PPM Webinar. During it Rob will discuss important factors to consider when undertaking a bimodal approach, including: Financials, Metrics, Resources, Investment Hierarchy and Tooling.
Bubble Charts Quick Reference Guide	EX0220	Technical Trick	theBasiX	The Bubble Charts Quick Reference Guide technical trick provides an administrator with a quick tutorial on configuring bubble charts' colors. Bubble charts, while providing a wealth of information, may also be very confusing to configure. Using this guide, users will be able to customize their bubble charts' colors in a few steps.
Budget - Average Percent Variance	EX1110	Portlet	theWorX	Bar Chart displays average percent variance for all active projects by OBS unit. Percent variance = Planned Cost - Budgeted Cost / Budgeted Cost * 100. Projects with no Budgeted Cost are ignored for the calculation. Then all project variance percentages are algebraically added (some may be negative), and divided by total projects with a variance. This yields the Average Percent Variance. This calculation is performed for active projects in each OBS unit. OBS units include all units at all levels where projects are attached. Portlet filterable by OBS, Financial Status, and Financially Approved. Vertical axis = OBS Unit Name. Horizontal axis = Variance Percent. Data value = Average Percent Variance. Mouseover value = OBS Name + Average Variance Percent.
Budget Variance Details	EX1104	Portlet	theWorX	This portlet shows the variance between the budgeted cost and the planned cost for projects. This allows for the variance to be displayed between what was planned and what was approved. This provides the PMs with the ability to better plan the costs.
Building a Clarity PPM Roadmap - RegoU15	EX1026	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of Best Practices around the creation of a Clarity PPM Roadmap. It covers the approach, the assessment, entry points, planning and finally the detailing and building of the roadmap.
Building a Clarity PPM Roadmap | Best Practices - RegoU 2016	EX1134	Presentation	theBasiX	Do you have or want a Clarity PPM Roadmap that combines process and tool? In this class, you'll learn how to assess business conditions and map them to the rich functionality and capability of Clarity PPM. Learn the highest-valued path; it combines our implementation experience with industry standards and core PMI knowledge.
Building a File Based Integration	EX1339	Presentation	theBasix	Course Description: "Do you want to know more about building integrations using a flat file placed on an SFTP Server? This session will be a hands-on lab to build a flat file integration and discuss best practices around error handling." Download is the slide deck used during the class.
Building a Web Service | Lab	EX1337	Presentation	theBasix	Course Description: "Do you want to know more about building integrations using Clarity PPM's web services? This session will be a hands-on lab to build a web service based integration and discuss situations where other web services can be used." Download is the course slide deck.
Building an Effective Strategic Roadmap	EX1338	Presentation	theBasix	Course Description: "How do you create an effective Clarity PPM roadmap? This session will review the key elements needed to have an effective roadmap that can drive increased maturity and excitement within your organization." Download is the slide deck from the presentation.
Building an Inbound File Based Integration | Lab - RegoU 2018	EX1475	Presentation	theBasiX	Do you want to know more about building integrations using a flat file placed on an SFTP Server? This session will be a hands-on lab to build an inbound flat file integration and discuss best practices around error handling.
Building and Consuming a Web Service | Lab - RegoU 2018	EX1476	Presentation	theBasiX	Do you want to know more about building integrations using Clarity PPM's web services? This session will be a hands-on lab to build a web service-based integration and discuss situations where other web services can be used.
Building Interactive Classes & Materials - Webinar	EX1222	Presentation	theBasiX	Maximize the value of your training delivery by increasing end user engagement with the course content. Discuss options to optimize efficiency and help ensure users are engaged while participating in training. To view the webinar, click here – http://event.on24.com/wcc/r/1213026/5817D85CFA250EC428DF4814167DD1C1
Building Power Filters QRC	EX1233	Training - Doc	theBasiX	A Quick Reference Card to assist in the building of Power Filters in Clarity PPM. A power filter is a custom filter that searches a list page by criteria you define. Only one power filter can be created for a list page.

Name	ID	Work Type	Location	Long Description
Building Solutions with Open Workbench - RegoU15	EX1027	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of the advanced functionality of Open Workbench and it ability to build, schedule and control a project. It covers access and navigation of Open Workbench, use and manipulation of views, manipulation of the Work Breakdown Structure, building task dependencies, assigning resources to tasks, use of Autoschedule, Baseline your project, transfer assignments, understanding the role of timesheets in the tracking and control cycle, managing pending actuals and ETCs, accepting or rejecting pending ETCs, and updating tasks and project status.
Bulk Role Replacement on Tasks	EX1099	Technical Trick	theBasiX	This Tech Trick walks you through the steps in Clarity PPM to make Bulk Role replacements on tasks. Useful when you want to make the changes to the project template which has a large WBS structure, and a lot of role assignments to tasks.
Business Objects Best Practices	EX0660	Training - Doc	theBasiX	A document that outlines and explains best practices for Business Objects in Clarity PPM. Content includes Implementation Plan, Initial Business Object Setup, Overall Architecture, Designer Tips & Tricks, Important Universe Parameters, Working with Tables & Joins, Classes & Objects, Migrating Universes & Reports, Maintaining & Enhancing Universes, and Upgrading Business Objects & Universes.
Business Transformation 2.0 - Webinar	EX1589	Presentation	theBasiX	Who hasn't held their breath during a major business transformation initiative, whether that's shifting a process, product, or target market? Transformation is high-stakes and complex, and solid plans tend to go awry after they're handed off to different units for execution. And it's not just execution. Idea and scope capture creates a unique challenge on the front end. Join Rego, BASF, and CA Technologies for an insightful discussion on how organizations have used Clarity PPM (Clarity) to automate and score idea capture, cohesively move toward realization, accelerate prioritization, execute on initiatives, and track their business transformation benefits.
Business Transformation 2.0 - white paper	EX1619	Presentation	theBasiX	Who hasn't held their breath during a major business transformation initiative, whether that's shifting a process, product, or target market? Transformation is high-stakes and complex. Studies show that in the next fifteen years, 75% of the S&P 500 will turn over, and in the next five years, one in five companies are expected to delist. To survive—and thrive—your business has to be out in front, ready to adapt to whatever market forces the future may bring. Use this guide from Rego to help you navigate your transformation.
Calculated Project Health | Automation Alternatives	EX1342	Presentation	theBasix	Course Description: "Executives use reports to try and identify projects that are in trouble and those that have a high probability of being in trouble—Clarity PPM should be able to automate this. In this class, we will explore traditional earned value management, but we will also look at alternatives put in place to get some objective measures of health without requiring a detailed EVM." Download is the slide deck from the presentation.
Calculated Project Health | Automation Alternatives - RegoU 2016	EX1139	Presentation	theBasiX	Executives use reports to try and identify projects that are in trouble and those that have a high probability of being in trouble—Clarity PPM should be able to automate this. In this class we will explore traditional earned value management, but we will also look at alternatives put in place to get some objective measures of health without requiring a detailed EVM.
Calendar View of Projects - JS Report	EX1649	Report	theWorX	Calendar report provides a view of Projects, Milestones or Tasks that has finish date within the user selected month. User has the flexibility to choose to Calendar view as Monthly or Weekly and also number of periods that needs to be displayed in the report. Report can be filtered to show only Projects or Milestones or Tasks with the checkboxes provided. It can also be further filtered using Project Manager and Project OBS parameters.
Capacity Graph	EX0025	Portlet	theBasiX	The Capacity Graph portlet displays Availability, Allocations, Actuals and Assignments for one or more active resource(s) in a single view. This portlet pulls data from timeslices, and allows the user to filter on a weekly, monthly or quarterly data. The Estimated Time to Complete (ETC) and Allocation data will only show for projects that are active. This portlet provides Resource Managers, PMOs and Executives with a simple way to analyze: Allocations vs. Availability, Allocations vs. Actuals, Allocations vs. ETC and ETC vs. Availability. The graph allows the user to determine where areas of improvement may exist and quickly identify potential areas of constraint.

Name	ID	Work Type	Location	Long Description
Capacity Graph - Investments	EX0026	Portlet	theWorX	The Capacity Graph - Investment portlet displays Availability, Allocations, Assignments and Actuals for active resources in a single project. This portlet pulls from timeslices and allows the user to filter on weekly, monthly, or quarterly data. This portlet provides a Project Manager with a simple way to analyze: Allocations vs. Actuals and Allocations vs. ETC. Depending on metric goals, the graph allows the user to determine where areas of improvement may exist.
Capacity Graph - Personal	EX0027	Portlet	theWorX	The Capacity Graph - Personal portlet displays Allocation, Availability Actuals, and Assignments for the logged in user in a single view. This portlet pulls from timeslices, and allows the user to filter on weekly, monthly, or quarterly slice data. The ETC and Allocation data will only show for active projects. This portlet provides a resource with a simple way to analyze: Allocations vs. Availability, Allocations vs. Actuals, Allocations vs. ETC, and ETC vs. Availability. The graph allows the user to determine where areas of improvement may exist.
Capacity Graph - Power BI	EX1666	Report	theWorX	Capacity Graph report displays Availability, Allocations, Actuals and Assignments for one or more active resource(s) in a single view. Report contains the following components: KPIs: Displays Available hours, Allocation + ETC for filtered criteria. Bar graph: Displays Allocation + ETC by primary role Line chart: Displays Availability, Allocations, Actuals and Assignments by time period. This portlet provides Resource Managers, PMOs and Executives with a simple way to analyze: Allocations vs. Availability, Allocations vs. Actuals, Allocations vs. ETC and ETC vs. Availability. User can further narrow their search by OBS Type & Path, Resource Manager, Primary Role, Start and End Date.
Capacity Graph (JS Report)	EX1447	Report	theWorX	Capacity Graph report provides the Resource Managers & PMO a single place to view Monthly Availability, Allocations, Actuals and Assignments for one or more active resources. Information is displayed in the form of a line chart. Legend displays the color associated with each metric. Mouse over the line chart displays hours associated with that corresponding metric. This report provides Managers a simple means to analyze: Allocations vs. Availability, Allocations vs. Actuals, Allocations vs. ETC and ETC vs. Availability and helps in determining the areas of improvement. User can further narrow their search by OBS Type & Path, Month Start Date, Resource Name, Resource Manager, Primary Role & Employment Type.
Capacity Planning by Primary Application	EX0934	Portlet	theWorX	The Capacity Planning by Primary Application portlet displays the capacity and demand by primary application for a selected timeframe. This portlet is used to determine which applications are in high demand, being used efficiently, and how much capacity may be remaining for the time period. The portlet may be filtered by application name, resource OBS or project OBS to narrow the results. The timeframe can be set to display daily, weekly, monthly, quarterly, or annually.
Capacity Planning by Role and Primary Application	EX0945	Portlet	theWorX	This portlet pulls back the Availability and Allocation totals by Role between a user-specified Start and Finish Date, then the user can drilldown to look at the information for Applications. The Time Period filter allows for comparing these values across different timeframes (monthly, weekly, quarterly, annual) as desired. Other filters allow for looking at Active or Inactive Roles (or both) and including Active or Inactive Projects (or both) in the totals.
Capacity Planning by Role and Skill	EX0236	Portlet	theWorX	The Capacity Planning by Role and Skill portlet displays all availability and demand in the system summarized by role. The portlet also allows the user to drill-down further into the role and separate the hours by primary skill. This portlet leverages the timeslices, and pulls availability from resources and allocation from the team records. The user is able to narrow the results by filtering on start/finish date, time period, active projects, and active resources. Using this portlet, a resource manager can quickly determine resource needs, skill needs, and overall allocation/availability of roles.
Capacity Planning by Skill	EX0251	Portlet	theWorX	The Capacity Planning by Skill portlet displays the capacity and demand by skill for a selected timeframe. This portlet is used to determine which skills are in high demand, being used efficiently, and how much capacity may be remaining for the time period. The portlet may be filtered by skill name, resource OBS or project OBS to narrow the results.

Name	ID	Work Type	Location	Long Description
Capitalization Calculation | Best Practices - RegoU 2018	EX1482	Presentation	theBasiX	Most organizations that use Clarity PPM have some requirements for training capital vs. operating work. We have seen so many ways for calculating capitalization, and we want to share some of the most common methods and discuss innovative ways (in light of agile processes) that are being implemented in some of our customers.
Change URL Attribute to an Image in List View	EX1466	Technical Trick	theWorX	This tech-trick defines how a URL attribute can be changed to an image in a list view via CSS.
Changing Application Logo & Title	EX0242	Technical Trick	theWorX	The Changing Application Logo and Title tech trick provides an overview of how to change the logo and title within the application. This allows administrators to rebrand Clarity PPM to their own logo and title. By customizing the logo, employees may be more encouraged to take ownership of the tool.
Changing the JS Report Programing Language - Jaspersoft Dev	EX1680	Technical Trick	theWorX	Changing the report programming language can allow the report developer to use other languages (such as Groovy or Javascript) instead of Java methods in expressions. This can be useful in debugging report code.
Clarity Health	EX1642	Portlet	theWorX	The Clarity Health portlet provides a quick glance into the health of key components and critical jobs in the Clarity environment. See the website for a listing of metrics monitored.
Clarity On Demand Portal User Report	EX1643	Report	theWorX	A common request from SaaS Clarity customers is to produce a report showing which users are present in the portal. Unfortunately, the CA portal does not provide a mechanism to export all users. It only provides a method to determine if a specific user is present in the portal. This gel script aims to solve that problem by producing a Microsoft Excel report using Clarity users as the source of user information. The gel script will iterate though all users in Clarity, determine if a corresponding user exists in the portal, and determines which applications (Dev, Test, Prod) the user is assigned to in the portal. The output of the gel script is an excel file in the format pictured below.
Clarity PPM - Modern UX Roadmaps: Access My Tasks	EX1655	Training - Video	theBasiX	This video shows Project Team Members and Project Managers how to access tasks in the Modern UX of Clarity PPM (Clarity PPM). Open the project tile page in the Modern User Experience. Above the project tiles, select the “My Tasks” link. Clicking this link will take you to the tasks you are assigned to on each of the projects you’re working. Click the name of a task to update its properties directly in the project, or access a checkbox to indicate the task status is complete. Click the conversation box to update task conversations. The conversation box also gives you access to task To Do, Staff, and Details. If you wish to return to the project tile view, click the Project link in the upper right portion of the screen.
Clarity PPM - Modern UX Roadmaps: Create a Custom Picklist	EX1652	Training - Video	theBasiX	Now Portfolio Managers can create and save custom picklists in the Modern UX Roadmap of Clarity PPM (Clarity PPM). 1 - Navigate to one of the views in the roadmap 2 - Click the settings button 3 - Access the Manage Picklists option 4 - Click the New Picklist button 5 - Give it a name 6 - Add Choices 7 - Use the color option to associate each choice with a color 8 - Click Done 9 - Use the Column Panel to add that Picklist into view via drag-and-drop 10 - Select a choice for each cell 11 - The color options we selected will be available in this view and all the views within the roadmap.

Name	ID	Work Type	Location	Long Description
Clarity PPM - Modern UX Roadmaps: Create a Global Lookup Attribute	EX1653	Training - Video	theBasiX	Clarity PPM Modern UX Roadmaps: Create a Global Lookup Attribute 1 - In the Roadmap Item Object, navigate to the Attributes tab 2 - Click the New button to create your new lookup attribute 3 - Give the attribute a Name and ID 4 - Select your previously created Lookup 5 - Populate te API Attribute ID 6 - Click Save 7 - If Desired, associate the values with a color 8 - Save and Return 9 - In the Modern UX Roadmap, you'll see the new attribute in the column panel. 10 - It can be added into view. 11 - As values are selected colors will populate.
Clarity PPM - Modern UX Roadmaps: GROUP BY on Financial Plans (Cost Plan & Budget Plan)	EX1656	Training - Video	theBasiX	In this video, we'll cover the Group By functionality available within Financial Plans in Projects within the Modern UX of Clarity PPM (Clarity PPM). Begin by navigating to the Financials tab on your Project. Note the Group By option at the top of the Financial Plan list. This allows us to group the Cost Plan or Budget Plan data by our grouping attributes indicated within the Cost Plan (e.g. Cost Type or Transaction Class). To group by one of the options, navigate to the field, click the icon and drag it to the Group By. The plan will instantly be reordered and grouped by your selected option. Expand and view the data within the grouping. Click the X to return the grouping to the full list. This Group By functionality is available within the Cost Plan and Budget Plan of a project.
Clarity PPM / Agile Integration Bi-Modal IT - RegoU 2018	EX1477	Presentation	theBasiX	Are you struggling with implementing Agile tools in your organization in addition to Clarity PPM? This class will review best practices for implementing agile tools in conjunction with Clarity PPM - living in a Bi-Modal world. We will discuss how Clarity PPM can be used to govern both types of work and teams and how Agile tools should interface into Clarity PPM.
Clarity PPM 15.4 Deep Dive - Part 1 - Webinar	EX1583	Presentation	theBasiX	A demo of the 15.4.1. dot release, including new Roadmap syncing capability. This webinar is hosted by Rego senior consultants Ross Hensel and Sara Garvey.
Clarity PPM 15.4 Deep Dive - Part 2 - Webinar	EX1584	Presentation	theBasiX	a demo on how to use Modern UX functionality for Project Management and Blueprints in Clarity PPM 15.4. This webinar is hosted by Rego senior consultants Ross Hensel and Sara Garvey. Now available whenever you are.
Clarity PPM 15.4 Deep Dive - Part 3 - Webinar	EX1585	Presentation	theBasiX	a demo on how to use Modern UX functionality for Staffing and Time Management in Clarity PPM 15.4. This on demand webinar is hosted by Rego senior consultants Ross Hensel and Sara Garvey.
Clarity PPM and Service Now | Demand Integration - RegoU 2016	EX1192	Presentation	theBasiX	For clients that have both ServiceNow and Clarity PPM, passing information between the systems becomes vital for the enterprise with both ITSM and PPM toolsets. One of the biggest areas of interaction is around Demand Management. Come and see Rego's Integration solution which flexibly allows for ServiceNow records (Incident, Problem, Idea, Enhancement, and Demands) to generate Clarity PPM Ideas or Projects. This lets you be in control of where you want to perform Demand Management, but let's the work land in Clarity PPM's Project either way.
Clarity PPM and ServiceNow | Demand Integration	EX1340	Presentation	theBasix	Course Description: "For clients that have both ServiceNow and Clarity PPM, passing information between the systems becomes vital for the enterprise with both ITSM and PPM toolsets. One of the biggest areas of interaction is around Demand Management. Come and see Rego's Integration solution which flexibly allows for ServiceNow records (Incident, Problem, Idea, Enhancement, and Demands) to generate Clarity PPM Ideas or Projects. This lets you control where you want to perform Demand Management, and the work lands in Clarity PPM's Project either way." Download is the slide deck used for the presentation.

Name	ID	Work Type	Location	Long Description
Clarity PPM Changes from 13.1 to 13.2	EX0683	Presentation	theBasiX	A PowerPoint presentations reviewing the changes you will see when upgrading Clarity PPM v13.1 to v13.2. This presentation is outlined as follows: * Portfolio and Portfolio Providers * Chart Grouping * Configurable OBS * Capital / Operating Expense Planning * Keyboard Shortcuts * Mobile Time Application * Upgrade Considerations * Data Model Changes
Clarity PPM Chargebacks Simplified	EX0986	Training - Doc	theWorX	This training presentation covers the following elements of Chargebacks in Clarity PPM: What are Chargebacks? The benefits of Chargebacks. How do Chargebacks differ from Cost Plans? Setting up Clarity PPM for the financial aspects of chargebacks. Things to consider before utilizing chargebacks.
Clarity PPM Community | Strengthening - RegoU 2016	EX1135	Presentation	theBasiX	In this session we are looking for your help to help us improve the Clarity PPM community. We believe a strong community helps everyone, and we want to explore things that we can do to help provide value to all Clarity PPM users.
Clarity PPM Development Process | Best Practices - RegoU 2016	EX1136	Presentation	theBasiX	Are you struggling with the best way to manage new Clarity PPM releases? In this class you'll learn the best practice for testing, release cadence, prioritization, and migration to higher environments. We will review strong business cases and discuss roles and process.
Clarity PPM Earned Value Field Descriptions - QRG	EX1058	Training - Doc	theBasiX	This document describes the fields used for earned value calculations.
Clarity PPM Financial Benefits | Overview - RegoU 2016	EX1137	Presentation	theBasiX	Are you considering the use of Clarity PPM's benefits tracking for planned and/or realized benefits? This session will be a review of common use cases for putting benefits forecasts and realized benefits into Clarity PPM along with the reporting available out of the box and within RegoXchange.
Clarity PPM Financial Benefits | Overview - RegoU 2018	EX1478	Presentation	theBasiX	Are you considering the use of Clarity PPM's benefits tracking for planned and/or realized benefits? This session will be a review of common use cases for putting benefits forecasts and realized benefits into Clarity PPM along with the reporting available out of the box and within RegoXchange.
Clarity PPM Financial Management: RegoU February 2014	EX0827	Presentation	theBasiX	RegoU Presentation from February 2014. Deploying financial management within Clarity PPM has the potential to provide huge benefits for your organization. Come learn the components of Clarity PPM financials, but more importantly how Clarity PPM Financials fits into an overall corporate financial planning and budgeting process.
Clarity PPM Hidden Pages - Flush Caches	EX0163	Technical Trick	theWorX	The Clarity PPM Hidden Page Flush Caches document provides an overview of how to clear the cache on an application server without exiting the Clarity PPM Application itself utilizing a hidden page within the system.
Clarity PPM Hidden Pages - Security Locks	EX0164	Technical Trick	theWorX	The Clarity PPM Hidden Page Security Locks document provides an overview of how to view and remove the locks currently being held on the system using the Security Locks hidden page.
Clarity PPM Hidden Pages - View XML	EX0167	Technical Trick	theWorX	The Clarity PPM Hidden Page View Page XML document provides an overview of how to access a portlet pages XML for you Clarity PPM application from the web.
Clarity PPM Hidden Pages - WSDL	EX0165	Technical Trick	theWorX	The Clarity PPM Hidden Page WSDL document provides an overview of how to access the system documentation page for you Clarity PPM application from the web.
Clarity PPM Hidden Pages - XOG Client	EX0166	Technical Trick	theBasiX	The Clarity PPM Hidden Page XOG Client document provides an overview of how to access a simple XOG client within the Clarity PPM application. This allows simple XOG'ing of Clarity PPM components without ever leaving the Clarity PPM application.
Clarity PPM Integrations | Most Common - RegoU 2018	EX1479	Presentation	theBasiX	What integrations are the most requested and the most utilized? This class will review the most common interfaces to and from Clarity PPM, including best practice use cases and lessons learned from real implementations.

Name	ID	Work Type	Location	Long Description
Clarity PPM Modern UX Roadmaps: View Staffing Periods (Time Period Span and Telescope)	EX1654	Training - Video	theBasiX	Clarity PPM Modern UX Roadmaps: View Staffing Periods (Time Period Span and Telescope) - In this video, we'll cover how project managers and resource managers can modify the telescoping periods within the staffing views of the Modern UX for Clarity PPM (Clarity PPM). Begin by navigating to the Staffing page in the Modern User Experience. In the upper right corner, access the Settings link. Ensure you're on the Staffing view, and modify your time period settings. Choose the Start Period. Indicate the Time Period Span. You may include multiple span types (e.g. 6 months worth of data, then two quarters of data, then the year beyond). Close the window, and the changes will take effect. Update data within the view, and it will apply to the periods. Click the Telescope in the upper left corner and choose within selected periods, which portions you want to focus on. Choose those in the telescope to see just those portions.
Clarity PPM Ongoing Enhancement Process | Best Practices - RegoU 2018	EX1480	Presentation	theBasiX	Do you want to understand what other organizations are doing to manage ongoing Clarity PPM enhancements and releases? This class will review some best practices we have seen within our customers to managing a successful backlog of Clarity PPM work.
Clarity PPM PMO Accelerator v3.0 Pack Reference Guide	EX0681	Presentation	theBasiX	This Reference Guide details all the portlets included within the Clarity PPM PMO Accelerator Pack v3.0. It provides a description of each portlet as well as providing an example screen shot.
Clarity PPM Portfolio Management Overview	EX0219	Training - Doc	theBasiX	The Portfolio Management training document provides an in-depth guide to portfolio management. This presentation is designed to provide project managers or the PMO with an overview to managing, grouping, analyzing, and creating scenarios within Clarity PPM's portfolio management module. This guide provides step-by-step instructions as well as detailed screenshots to ensure that the learning curve for your PMO team is minimal.
Clarity PPM Portfolio Management Overview - v13.2	EX0806	Training - Doc	theBasiX	The Portfolio Management in v13.2 training guide reviews creating and managing portfolio content in v13.2. Methods for users to move from historical versions of portfolios to the new 13.2 approach are also discussed.
Clarity PPM Project Management - PPT	EX0190	Training - Doc	theBasiX	The Project Management training document provides an in-depth guide to project management. This presentation is designed to provide project managers with an overview to creating a project, inputting data, assigning roles/resources, adjust ETCs and assignments and more within Clarity PPM's project management module. This guide provides step-by-step instructions as well as detailed screenshots to ensure that the learning curve for your project managers is minimal.
Clarity PPM Projects | Minimizing the Risk of Failure - RegoU 2016	EX1138	Presentation	theBasiX	Do you want to improve the success of your Clarity PPM projects? This class will discuss some lessons learned on making Clarity PPM projects more successful. We will discuss things like • Developing robust test plans, creating effective use and test cases, and implementing test scripts that make sense. • Why failures occur, and what you can do to minimize the impact and plan for success: case study in lessons learned. • Developing, testing, fine tuning, and executing deployment plans for success.
Clarity PPM Release 14.2 Functional Overview	EX0961	Training - Doc	theBasiX	A short, two page, Functional Overview of the changes to Clarity PPM in the v14.2 release. This includes: Advanced Reporting and Data Warehouse, Portfolio, Improvements to MS Project interactions, Resource Average Allocation Percent, and Non-Project Investment Objects.
Clarity PPM Reporting Options	EX1564	Technical Trick	theBasiX	This tech trick document reviews the different reporting options you have in Clarity PPM and the benefits of each options. Jaspersoft, PowerBI and Tableau are all discussed.
Clarity PPM Reporting Platforms: RegoU February 2014	EX0829	Presentation	theBasiX	RegoU Presentation from February 2014. Have you wondered what the best reporting platform is in Clarity PPM? The answer can vary depending on need so it is best to start with a review of the available and upcoming solutions. In this session, you will learn the pros and cons of each system and what reporting options are available in your Clarity PPM environment to determine how best to utilize them. Clarity PPM users from various industries will share successes and challenges for each option.
Clarity PPM Resource Management - PPT	EX0198	Training - Doc	theBasiX	The Resource Management training document provides an in-depth guide to resource management. This presentation is designed to provide resource managers with an overview to managing time, inputting users and roles, adjust allocations, availability and more within Clarity PPM's resource management module. This guide provides step-by-step instructions as well as detailed screenshots to ensure that the learning curve for your resource managers is minimal.

Name	ID	Work Type	Location	Long Description
Clarity PPM SaaS JDBC Connecting	EX1411	Technical Trick	theBasiX	You can now directly query your Clarity PPM SaaS database without the need for VPN. Utilize the open source SQL client SQuirreL to write read-only queries (up to 1000 rows) against the database.
Clarity PPM Schema	EX0239	Portlet	theWorX	The Clarity PPM Schema portlet provides information necessary for developing new or updating existing content for Clarity PPM Portlets, Processes, Lookups, Reports, or even Fields on an Object. It contains 400+ tables and almost 5800 fields before customizations. Developers will utilize this portlet to find the descriptions of the most used tables/fields, view available fields, and view the table joins needed when writing NSQL. In addition to the schema information, this portlet allows the user to filter by: Table Name, Field Name, Field Type, Description, and a complete set of “Groupings” that can be utilized to develop powerful views and maximize your Clarity PPM investment. Clicking on the paperclip link next to the Table Name will show the user possible joins that can be used.
Clarity PPM Security Models That Work: RegoU February 2014	EX0830	Presentation	theBasiX	RegoU Presentation from February 2014. Creating a security model that is overly complex and difficult to modify and maintain is easy to do when trying to implement tight security within Clarity PPM. In this session, you will learn some key concepts when designing and implementing security. Additionally, Rego’s team of experts will share tips and tricks for automating security, as well as ways to monitor the Clarity PPM rights that individuals have.
Clarity PPM Solution Pack Reference Guide	EX0679	Presentation	theBasiX	This Reference Guide details all the reports and dashboards included within the Clarity PPM Solution Pack. It provides a description of each as well as providing an example screen shot.
Clarity PPM Support Organization | Best Practices	EX1341	Presentation	theBasix	Course Description: “Can your Clarity PPM support team become more efficient? This class will discuss how other Clarity PPM users solve issues, discover solutions, and successfully use Clarity PPM. We will review industry best practice and how to support your user base with the optimal team.” Download is the slide deck from the presentation.
Clarity PPM Support Organization | Best Practices - RegoU 2016	EX1195	Presentation	theBasiX	Can your Clarity PPM support team become more efficient? This class will discuss how other Clarity PPM users solve issues, discover solutions, and successfully use Clarity PPM. We will review industry best practice and how to support your user base with the optimal team.
Clarity PPM Support Organization | Best Practices - RegoU 2018	EX1481	Presentation	theBasiX	Can your Clarity PPM support team become more efficient? This class will discuss how other Clarity PPM users solve issues, discover solutions, and successfully use Clarity PPM. We will review industry best practice and how to support your user base with the optimal team.
Clarity PPM Time Entry - Quick Reference Guide	EX0217	Training	theBasiX	The Clarity PPM Time Entry Quick Reference Guide is a two-page document, intended to be utilized as "quick reference" for any questions relating to Clarity PPM Time Entry. Topics such as accessing timesheets, adding tasks to the timesheet and submitting, modifying, approving and adjusting timesheet data are covered in this two-page reference. The document may be printed and posted at your desk and referred to should any questions arise during your time entry process.
Clarity PPM Upgrade Value Overview	EX0911	Presentation	theWorX	Review of functional and technical changes to Clarity PPM from version 12.1 through 13.3. This spreadsheet includes the functional & technical additions for each version upgrade, along with any technical remediation necessary. In addition, an analysis of Timeline & Effort for upgrades are covered for both on-premise and on-demand.
Clarity PPM V13 Users Guide	EX0212	Training - Doc	theBasiX	Overview of changes in Clarity PPM v13.
Clarity PPM: On Premise or SaaS - white paper	EX1617	Presentation	theBasiX	Move to the cloud. It’s a refrain that’s become frequent and familiar to organizations of all sizes. Choosing software-as-a-service (SaaS) over traditional on-premise software is generally a no-brainer these days for standard user apps. But do the same advantages apply to data-intensive systems like Clarity PPM? This paper explores the pros and cons of transitioning from on-premise Clarity PPM to its cloud alternative.
Collaboration Action Items QRC	EX1312	Training Document	theBasiX	A Quick Reference Card to assist in the use of the Action Items available under the Collaboration Tab on the investment. Action Items are non-tasks that you assign to yourself, or others assign to you. You can use action items to track the progress of projects and to ensure that a project is complete and on time.
Collaboration Discussions QRC	EX1313	Training Document	theBasiX	A Quick Reference Card that reviews the functionality of Discussions in the Collaboration Tab on the investment. You can use discussions to exchange ideas and communicate in a central location on subjects relevant to the project.
Collaboration Document Manager QRC	EX1314	Training Document	theBasiX	A Quick Reference Card that reviews the functionality of Discussions in the Collaboration Tab under investments. The Document Manager is an investment document repository. It can be used to store documents, artifacts, external client schedules, etc. for investment participants.

Name	ID	Work Type	Location	Long Description
Collaboration Documents On Projects	EX1677	Portlet	theWorX	This Portlet allows users to quickly access Documents they uploaded into Projects via the Classic UI ? Collaboration tab or via the New UX Documents module. Clicking on the File Name downloads the file, clicking on the Options gear allows users to export the list to Excel.
Collaboration in Clarity PPM	EX1002	Training - Doc	theBasiX	This PowerPoint training provides an overview of the Collaboration functions within Clarity PPM. The Collaboration tab provides a repository for project-specific items that can be used to aid in the execution of the project. The presentation reviews Participants/Participant Groups, Collaboration Managers, Documents, Discussions and Action Items.
Collaboration Participation Groups QRC	EX1315	Training Document	theBasiX	A Quick Reference Guide that reviews the Participant Groups menu item under the Collaboration Tab for investments. You can organize Project Participants into Participant Groups. Participant Groups enable you to manage documentation access rights collectively. Note: Clarity PPM automatically adds project resources as participants when you add them to the Team Tab.
Communicating the Value of PPM - Webinar	EX1594	Presentation	theBasiX	You know project management can deliver amazing ROI for projects and companies. But does your leadership? Or team? And how do you define the value of PPM—both personally and for your organization? Join two of Rego's senior PPM consultants, Wes McCoubrie and Jen Scarlato, as they tackle how to identify what PPM can really do for you and the strategies you can use for effective promotion.
Communications Portlet - Complex	EX0232	Portlet	theBasiX	The Communications Portlet - Complex portlet provides a detailed mechanism to communicate with Clarity PPM users using external, internet standard, javascript libraries. The content of the porlet can be edited easily through the Portlet administration screens within Clarity PPM. This is a very beneficial method of delivering messages to your Clarity PPM users all at the same time.
Communications Portlet - Simple	EX0231	Portlet	theBasiX	The Communications Portlet - Simple portlet provides a simple mechanism to communicate with Clarity PPM users. The content of the porlet can be edited easily through the Portlet administration screens within Clarity PPM. This is a very beneficial method of delivering messages to your Clarity PPM users all at the same time.
Concatenate Multi-Value Lookup into One Field for Display Purposes	EX0979	Technical Trick	theWorX	The Concatenate Multi-Value Lookup into One Field for Display Purposes technical trick provides an overview of how to group or concatenate the various levels and values of a Multi-Value lookup into one field in both Oracle and SQL Server environments. This allows the lookup values to be more easily displayed in a portlet. The function concatenates the values together using a choice of delimiter, which then allows the multi-value lookup to be viewed as one portlet column, in the same manner as any other object attribute.
Conditional Styles - Override Issue - JasperSoft Dev	EX1217	Technical Trick	theWorX	Styles can be applied to reports in two ways. The first is to select the item and apply a style directly to it. The other is to apply a style to an entire report. When an item has had a style directly applied to it the application of a style to the entire report will not change the styles with manual styles applied. The manual styles override the entire report style application. This trick shows you how to find and remove manual styles.
Configuration / Administration in the Modern UX - RegoU 2018	EX1483	Presentation	theBasiX	This class will focus on the setup of the new UX. This class will include topics such as: turning on new UX, setting up links, blueprints, and configuration of tiles and objects. We will also explain how the new UX and the Classic UX interact when it comes to administration (e.g., if I build a process in classic, does it still get triggered in new UX? if I add a new attribute in classic, how is it exposed in new UX?).
Configure a List View QRC	EX1234	Training - Doc	theBasiX	A Quick Reference Card for configuring List Views in Clarity PPM. List views are accessed from the Home menu.
Configure the Gantt QRC	EX1316	Training Document	theBasiX	A Quick Reference Card to assist as you configure the Gantt on a project. The Gantt Options Icon allows you to configure the view and/or change the timescale.
Configure the Resource List QRC	EX1270	Training Document	theBasiX	A Quick Reference Card to assist in the configuration of the Resource List in Clarity PPM. Change filter options and adjust layout.
Configure the Task List QRC	EX1317	Training Document	theBasiX	A Quick Reference Card to assist as you configure the Task List under the Task Tab on the project. You have the option to remove or add fields to the Task List.
Content Development | With CAPA - RegoU 2016	EX1140	Presentation	theWorX	Learn how to create digital educational content with CA's CAPA software.
Content Development in CAPA - RegoU15	EX1036	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of developing content in CAPA. It begins with a section on getting started, followed by managing the library, building an outline, recording the content, the topic editor, previewing a topic, and publishing content.

Name	ID	Work Type	Location	Long Description
Content Development with CAPA	EX1343	Presentation	theBasiX	Course Description: “Would you like hands-on experience developing CAPA content for your user base? Learn how to create digital educational content with CA’s CAPA software. CAPA is a powerful tool embedded within Clarity PPM that can provide context sensitive help, short click-through training topics, and testing assistance.” Download is the slide deck used during the class.
Contract / Vendor Management	EX1344	Presentation	theBasix	Course Description: “Are you tracking your vendor contracts outside of Clarity PPM? Have you ever considered moving the data into Clarity PPM? This session will review a set of use cases where Clarity PPM is being used to manage vendor contracts and how they are linked to resources, projects, and time to drive efficiencies in monitoring contracts and comparing actuals to invoices.” Download file is the slide deck used for the class.
Contract / Vendor Management | Clarity PPM Role - RegoU 2018	EX1484	Presentation	theBasiX	Are you tracking your vendor contracts outside of Clarity PPM? Have you ever considered moving the data into Clarity PPM? This session will review a set of use cases where Clarity PPM is being used to manage vendor contracts and how they are linked to resources, projects, and time to drive efficiencies in monitoring contracts and comparing actuals to invoices.
Contract Management Info	EX1219	Presentation	theBasiX	Manage Contract Deliverables, Costs, and Milestones with Clarity PPM: Now you can use Clarity PPM to manage your contracted work. Rego’s new Contract Management Module tracks vendors, milestones, and deliverables in real-time, so you can see status and spend by contract—as it occurs on your project. Contract Management Capabilities: Get better visibility into your contracts and projects. * Identify and Track all Contract Deliverables * Manage Contract Status, Spend, Vendors, and Contacts * Associate Contract Deliverables with Project and Task Milestones * Apply Deliverable Costs to a Project * View Contract Spending Over Time in Project Financial Plans * Forecast Contract Spending by Project * Associate Contracting Vendors with Clarity PPM Vendors * Associate Sub Contracts to Contracts Note: The download document is an more detailed information document. Installation of the module by Rego in required and will take approximately 50 hours of contracted time for the installation and configuration.
Convert Idea to Project with Team/Template	EX0910	Workflow Job	theWorX	The Idea to Project with Team/Template process allows a user to create Projects by converting them from Ideas including retaining the Team from the Idea. Using this process minimizes the effort needed for PMs to setup new projects by importing much more data from the initial Idea. The entire process is greatly streamlined. Additionally, the Idea to Project with Team/Template process provides the ability for the user to select an existing project template before converting the Idea to a Project. By using a predefined template, standard tasks from the project template (as well as the team that is currently on the Idea) will be copied over to the newly created project’s schedule. Note: The project template cannot include any Roles, Resources or Assignments.
Convert Incident to Task	EX0030	Workflow Job	theWorX	The Convert Incident to Task workflow process allows users to quickly create tasks from incidents without the need to input the information twice. It utilizes a newly added checkbox and project fields on the incident object. The user will need to select the project that he or she wants the task added to using the "Project" field on the incident object. Next, the "Convert to Task" checkbox will kick off the process. Once ticked, the process will perform the necessary actions to create a task on the specified project.
Converting Incidents to Project Work QRC	EX1245	Training - Doc	theBasiX	A Quick Reference Card that assists in the conversion of an Incident. Allows for conversion to a task or to a project.
Copy a Baseline	EX1108	Workflow	theWorX	The process creates a copy of the current baseline and flags the new baseline as the current baseline. This process can be launched through Action menu, and requires baselines to be auto-numbered.
Copy from Template QRC	EX1257	Training Document	theBasiX	A Quick Reference Card to assist as you copy tasks, task estimates, or staff assignments from templates into the current project within Clarity PPM.
Cost Plan Population Process	EX1688	Workflow	theWorX	This workflow is run as a scheduled or immediate Job to populate Project Cost Plans. It can be configured to run on any desired set of projects. It can be configured to populate the Cost Plan of Record based on Allocations or based on Assignments.

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Creating & Maintaining Business Objects Universes: RegoU February 2014	EX0835	Presentation	theBasiX	RegoU Presentation from February 2014. Did you know that Clarity PPM ships with a set of Business Objects Universes that allow you to create and customize reports? In this session, Rego's Clarity PPM team will show you how to add fields and lookups to a Universe, make modifications to existing fields, and link Universes together. At the end of this session, you will be able to take advantage of the power of WEBI (for ad-hoc reporting) by creating your own Universes and linking them to the ones CA provides. We will also cover the use of Jaspersoft functionality within reports.
Creating a Benefit Plan QRC	EX1297	Training Document	theBasiX	A Quick Reference Card to assist in the creation of Benefit Plans in Clarity PPM. Creating a benefit plan and associating it with a cost plan allows you to calculate ROI or NPV on an investment. A benefit plan can be associated with an unlimited number of cost plans, a cost plan can have only one associated benefit plan.
Creating a Cost Plan and Plan of Record QRC	EX1298	Training Document	theBasiX	A quick reference card to assist in the creation of Cost Plans in Clarity PPM. The Plan of Record (POR) is the cost plan that you intend to use as the budget plan for an investment. The first cost plan you create for an investment becomes the POR by default. You can reassign the POR to any plan and submit it for budget approval. You can keep the remaining cost plans for future use or reference. You cannot delete a POR.
Creating a Financial Summary QRC	EX1300	Training Document	theBasiX	A quick reference card to assist in the creation of a Financial Summary for an investment.
Creating a Program QRC	EX1250	Training - Doc	theBasiX	A Quick Reference Card to assist in the creation of a Program.
Creating a Project QRC	EX1258	Training Document	theBasiX	A Quick Reference Card to assist in creating a project in Clarity PPM. Reviews options of creating from New or New from Template.
Creating a Project Status Report - Classic View	EX1414	Training Video	theBasiX	This video is a step-by-step guide to creating a project status report in the Clarity PPM Classic view option for v15.x.
Creating Advanced WEBI Reports: RegoU February 2014	EX0832	Presentation	theBasiX	RegoU Presentation from February 2014. Get ready to develop reports at lightning speed! WEBI reports are one of the fastest and most Excel-friendly forms of Clarity PPM reporting, allowing you to build reports "on demand" and email PDFs out to end-users. In this session, we will teach you how to create high-impact WEBI reports and share tips & tricks for reducing development time. We will also introduce the use of Jaspersoft functionality within WEBI reports.
Creating and Tuning SQL Queries that Engage Users - RegoU15	EX1042	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU of creation and tuning of SQL queries. The presentation covers the goals of the process, reuse of code, knowing your data, knowing your database, bottlenecks, tips & tricks and then exercises.
Creating Crystal Reports: RegoU February 2014	EX0837	Presentation	theBasiX	RegoU Presentation from February 2014. Crystal reports are one of the most flexible forms of reporting, allowing you to recreate specific deliverable formats and forms. This session is for those who want to learn how to build Crystal reports and a couple tricks for making them more appealing.
Creating Custom Domains - Webinar	EX1220	Presentation	theBasiX	Learn how to create Custom Domains and Dashboards on the fly with Rego's Atul Kunkulol. This is a fun technique to use with your Demand and Capacity. To view the webinar click here - http://event.on24.com/wcc/r/1219157/B398371FAAAF960D6B26717D66F8011A
Creating Dependent Lookups	EX0032	Technical Trick	theWorX	The Creating Dependent Lookups Based On Other Fields On The Same Page document provides the steps needed to allow a user to create lookups whose values are dependent on other fields on the same page. Having the ability to use a lookup field whose list of values change based on other fields values on the same page can help reduce the number of fields that might be required and provide more relevant options to the user based on other data selections.
Creating Master Subprojects QRC	EX1259	Training Document	theBasiX	A Quick Reference Card to assist in the creation of Master-Subprojects in Clarity PPM.
Creating Personal Action Items QRC	EX1296	Training Document	theBasiX	A quick reference card to assist you in making Action Items in Clarity PPM. Action Items are non-tasks that you assign to yourself, or others assign to you. You create personal action items in the Actions Item portlet on the Overview page.
Creating Program Milestones QRC	EX1251	Training - Doc	theBasiX	A Quick Reference Card to assist in the creation of Program Milestones in Clarity PPM. This can be done from the Tasks Tab or from the Clarity PPM Gantt.
Creating Project Level Dependencies QRC	EX1260	Training Document	theBasiX	A Quick Reference Card to assist in the creation of project level dependencies. You can create dependency relationships that exist between investments in a portfolio using the dependencies page of project or program properties. A dependency can occur when a task in an investment requires to be completed before a task in another investment can begin.
Creating Training Videos	EX1345	Presentation	theBasiX	Course description: "Would you like to create digital training videos to increase user adoption? Learn how to use Camtasia Studio to make your own visual, educational FAQ. It's a flexible and easy-to-use desktop tool for screen recording, voice over, video editing, production, and content-sharing." Download file is the slide deck used during the class.

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Creating Training Videos & CAPA - RegoU 2018	EX1485	Presentation	theBasiX	Would you like to create digital training videos to increase user adoption? Learn how to use Camtasia Studio to make your own visual, educational FAQ. It's a flexible and easy-to-use desktop tool for screen recording, voice over, video editing, production, and content-sharing.
Creating Training Videos | Using Camtasia Studio - RegoU 2016	EX1141	Presentation	theBasiX	Would you like to create digital training videos to increase user adoption? Learn how to use Camtasia Studio to make your own visual, educational FAQ. It's a flexible and easy-to-use desktop tool for screen recording, voice over, video editing, production, and content-sharing.
Current Proxies	EX0033	Portlet	theWorX	The Current Proxies portlet provides a user with an overview of all the resources in the system currently using a proxy. This portlet is helpful to determine a proxy if a user is currently out of the office. The portlet provides several pieces of information related to the resource including: resource names, proxy, start date, end date, days remaining, total days, and if the proxy is active. The user may filter by resource name, proxy name, proxy status (defaults to Yes), and start/end dates (defaults to the current date).
Custom Attributes in System	EX0034	Portlet	theWorX	The Custom Attributes in System portlet displays all of the custom attributes present in the system and the lookup (if applicable) associated with each. This portlet is useful finding a custom attribute on an object, auditing, or for documentation purposes. The user may narrow the results by object, data type, and last updated date.
Custom Calendar Module	EX0233	Portlet	theWorX	The Custom Calendar portlet and accompanying add-on module delivers project/program milestone and completion dates via an easy to read and navigate calendar view. Users may access and download an .ics (standard calendar format) formatted file for any event on the calendar. This file, which is recognized by most major desktop calendar applications (e.g., Outlook), allows users to add any event to their personal calendars. This portlet can be configured during install to filter events based on the security access of the logged in user, or to show all events. As configured, the module displays the following program/project dates: • Project Milestones • Project End Dates • Program End Dates This module may be customized to show additional dates. Contact us for more information. Rego Consulting engagement is required to setup and deploy module to client environment(s) A) Requires direct connection to the Clarity PPM database via the Clarity PPM DB user B) Requires Java WAR file deployment directly to the Clarity PPM Application Server **This module will require 10-20 hours of Rego Consulting assistance to install/configure

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Custom LDAP	EX0237	Add-On Application	theWorX	One large challenge many organizations face when deploying Clarity PPM is how to keep user accounts up to date. This can be a very time consuming process when done manually. Clarity PPM provides two stock LDAP jobs that can be used to create and deactivate Clarity PPM users based on data obtained from LDAP. When a user is created in Clarity PPM by the stock LDAP job their First Name, Last Name, Full Name, User Name, Resource ID, and Email address are pulled into Clarity PPM. While this gives a Clarity PPM administrator a good start there are many other time consuming activities that go into setting up a new user with Clarity PPM access. Many organizations have the additional information needed to fully establish a Clarity PPM user stored in their LDAP directory but the stock job is not written to use these additional attributes. In these cases, a custom LDAP job can be written in place of, or as a supplement to, the stock LDAP jobs. A custom job eliminates the limitation of querying LDAP for only the six fields that the stock Clarity PPM job uses. It also allows for additional logic to be applied to establish a more complete user account at the time of creation, and to keep existing information up to date. The first step is to define the business requirements around what fields are needed to establish a new user and what fields are to be kept in sync with LDAP for existing users. Common requests are to populate the resource manager, booking manager, OBS, active/inactive, open for time entry, and financial fields based on the LDAP data. Logic can be applied to add resources to selected projects based on their business unit or add users to security groups based on their group membership in LDAP. Custom names can be populated in the Clarity PPM database in instances where professional titles are important. The Rego approach uses a GEL script that calls methods of a custom java class. The java class can be customized to query LDAP for various fields based on the business requirements. When the job is initiated the java class will read the LDAP and database connection
Custom License Count	EX0036	Portlet	theWorX	The Custom License Count portlet displays the license type and amount of users with each type of license. This portlet can be modified by adjusting the query to exclude certain rights within manager licenses based on negotiated license types with CA. For example, if CA allows creation of a subobject to Incident to be included in a Team Member license, this portlet can be used to reflect the true license counts vs. the standard CA license counts.
Custom License Count Detail	EX0037	Portlet	theWorX	The Custom License Count Detail portlet displays the license type information for all users within Clarity PPM as well as last login date for clean-up. This portlet can be modified by adjusting the query to exclude certain rights within manager licenses based on negotiated license types with CA. For example, if CA allows creation of a subobject to Incident to be included in a Team Member license, this portlet can be used to reflect the true license counts vs. the standard CA license counts.
Custom Portlet Configs	EX0038	Portlet	theWorX	The Custom Portlet Configs portlet will display all portlets where the user has modified any settings like the filter or list views. This portlet is helpful for troubleshooting and to determine which users may be affected during an upgrade. The portlet may be filtered by several criteria and displays the resource name, ID, OBS path, portlet, and portlet ID.
Dashboard - Baseline Comparison	EX0039	Portlet	theWorX	The Dashboard: Baseline Comparison portlet compares multiple baselines on a single project. The portlet is added to the dashboard page of a project and will pull in baselines for that project and perform a comparison between them. This portlet provides a quick way for project managers to view the differences between their baselines, especially if they have multiple members updating the project.
Dashboard - Change Requests	EX0137	Portlet	theBasiX	The Dashboard: Change Requests portlet gives an overview of all change requests on the project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet sorts the issues first by priority and then by target date. It displays the name, owner, status, target date, approved by, and the priority.
Dashboard - Financial Summary by Charge Code	EX0138	Portlet	theWorX	The Dashboard: Financial Summary by Charge Code portlet displays financial information from the project summarized by Charge Code. The portlet is added to the dashboard page of a project and will pull all actuals by charge code on the project. The user may filter by date range to narrow the results.
Dashboard - Open Issues	EX0139	Portlet	theBasiX	The Dashboard: Open Issues portlet gives an overview of all issues that are not closed or resolved for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet sorts the issues first by priority and then by target date. It displays the name, target date, owner, status and priority.
Dashboard - Open Milestones	EX0140	Portlet	theBasiX	The Dashboard: Open Milestones portlet gives an overview of all milestones that are started or not started for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The milestones are sorted by Due Date. It displays the name, Due Date, Baseline Date, Days Late (Due Date - Baseline Date), and Days Old (Current Date - Due Date).

Name	ID	Work Type	Location	Long Description
Dashboard - Open Risks	EX0141	Portlet	theBasiX	The Dashboard: Open Risks portlet gives an overview of all risks that are not closed or resolved for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet sorts the risks first by priority and then by target date. It displays the name, owner, target date, probability impact, and priority.
Dashboard - Programs Portfolios	EX0041	Portlet	theWorX	The Dashboard: Programs Portfolios portlet is placed on the dashboard page of a project. This portlet will show any programs or portfolios the project is a subproject of. The portlet will display the name, code, connection type, manager, and start/finish dates.
Dashboard - Project Information	EX0160	Portlet	theBasiX	The Dashboard: Project Information portlet gives a set of high level information about the project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet displays the name, project ID, project manager, description, start date, finish date, baseline start, and baseline finish.
Dashboard - Project Status Indicators Multi	EX0157	Portlet	theBasiX	The Dashboard: Project Status Mulit-line portlet gives an overview of the project overall status as well as the status indicators on the "current" status report object. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. This portlet displays each type of status, the symbol related to the severity, and the explanation for the status across multiple lines in the portlet.
Dashboard - Status Indicators - Single	EX0158	Portlet	theBasiX	The Dashboard: Project Status Single-line portlet gives an overview of the project overall status as well as the status indicators on the "current" status report object. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. This portlet displays the report date, symbols relating to the overall status, scope, schedule, cost/effort, and the overall explanation across a single line in the portlet.
Dashboard: Phase Gantt	EX0142	Portlet	theBasiX	The Dashboard: Phase Gantt portlet gives an overview of all WBS level 1 tasks or milestones for a single project. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the project dashboard tab. The portlet displays the name, and a graphical representation of the timeline for the phases. The date range may be configured by day, month, year, or quarter. The start date may also be configured to any date or a relative date (start of current month, start of next year, etc).
Dashboards / Metrics | Best Practices - RegoU 2018	EX1486	Presentation	theBasiX	Are you looking for some great examples of dashboards that include metrics/KPIs? This session will review a host of sample metric dashboards in use today that can spark ideas for you to implement in your company.
Dashboards / Metrics | Samples	EX1346	Presentation	theBasix	Course description: “Are you looking for some great examples of dashboards that include metrics/KPIs? This session will review a host of sample metric dashboards in use today that can spark ideas for you to implement in your company.” Download file is the slide deck used during the course.
Dashboards | Community Sharing - RegoU 2018	EX1487	Presentation	theBasiX	Do you have a favorite metric or dashboard? This class was an open sharing session where participants were given a couple minutes to share metrics and dashboards used within their organization. Download doc contains some of the shared content.
Data Issues - Porjects (JS Report)	EX1448	Report	theWorX	Data Issues - Projects report displays data exceptions related to projects. Data exceptions could be missing data or data not in required format for those project fields. User can further narrow their search by OBS Type & Path, Project Name, Project ID and Project Type.
Data Issues - Projects	EX0042	Portlet	theBasiX	The Data Issues - Projects portlet is used to identify data exceptions related to project setup. This portlet helps to identify where projects are missing key data or are possibly sitting in an exception state. This view will show projects that have one or many exceptions, including inactive projects. The user may also narrow the results by project, OBS, or project type.
Data Issues - Resources	EX0043	Portlet	theBasiX	The Data Issues - Resources portlet is used to identify data exceptions related to resource setup. This portlet helps to identify where resources are missing key data or are possibly sitting in an exception state. This view will show resources that have one or many exceptions, including inactive resources. There is no security built into this portlet - all resources will show. The only required field in the filter is Days, which is the number of days since the user last logged in. The user may also narrow the results by resource, OBS, or project type.

Name	ID	Work Type	Location	Long Description
Data Model | Advanced	EX1347	Presentation	theBasix	An advanced look at: * Portfolio & Financial Tables - Portfolio, Financial * OBS & Lookup Tables - OBS, Lookups, Multi-Values Lookups * Admin Tables - Notifications, Captions, Custom Attributes on Objects, Portlet Tables, Security Tables
Data Model | Advanced - RegoU 2018	EX1488	Presentation	theBasiX	Do you have a good grasp on the data model? This class will give you advanced insight into the Clarity PPM data model and provide training on how to write queries within Clarity PPM for use in your portlets and reports.
Data Model | Beginner	EX1348	Presentation	theBasix	Course description: “Do you want to learn how to get basic data out of Clarity PPM for use in portlets? This class will review the basic Clarity PPM data model and provide training on how to write queries within Clarity PPM for use in your portlets and reports.” Download file is the slide deck used during the class.
Data Model | Beginner - RegoU 2016	EX1142	Presentation	theBasiX	Do you want to learn how to get basic data out of Clarity PPM for use in portlets? This class will review the basic Clarity PPM data model and provide training on how to write queries within Clarity PPM for use in your portlets and reports.
Data Model | Intermediate - RegoU 2018	EX1489	Presentation	theBasiX	Do you have enough experience with the data model to be dangerous - maybe just the basic project and resource tables? This class will take you to the next level in understanding the Clarity PPM data model and provide training on how to write queries within Clarity PPM for use in your portlets and reports.
Data Warehouses | How to Use - RegoU 2016	EX1143	Presentation	theBasiX	Are you curious about the new 14.2 Data Warehouse? This class will teach you how to navigate your way around the new data model, understand the jobs populating it, and compare it to the various existing data mart and core Clarity PPM aggregation tables.
Deactivate User	EX0963	Workflow Job	theWorX	This is a process to lock any users that have not logged in within the last 90 days.
Deleting Resources with No Actuals Booked	EX1098	Technical Trick	theWorX	This technical trick provides a supported method for removing team members from a project programmatically. This is a XOG-based solution that might be called by a gel script in a process workflow. Limitation is that the resource must NOT have actuals booked. Screen shot 2 shows the after image
Demand / Portfolio Management | Best Practices - RegoU 2018	EX1492	Presentation	theBasiX	Are you starting a demand/portfolio management implementation, or do you want to compare how you are using these functions vs. others or best practices? In this class we will discuss some best practices from successful customers.
Demand Management | Best Practices	EX1349	Presentation	theBasix	Course description: “Do you want to know the best practices for implementing demand management? In this class, we’ll discuss reasons for using demand management and what you need to start.” Download file is the slide deck used for the course.
Demand Management | OOTB Introduction - RegoU 2018	EX1490	Presentation		Do you want to understand the OOTB configuration and functionality of demand management? In this class, we will review the OOTB objects, views, views, and functions of ideas, incidents, and other related areas.
Demand Management | Round Table	EX1350	Presentation	theBasix	Course Description: “Do you want to know the best practices for implementing demand management? In this moderated Round Table on best practices, we’ll discuss configurations, incidents, and ideas.” Download file is the slide deck used during the discussion.
Demand Management | Round Table - RegoU 2018	EX1491	Presentation	theBasiX	Do you want to talk to other customers that are using or plan to use demand management? In this moderated Round Table where customers can share experiences and provide insights on process, configurations, challenges, and successes. We will divide into small groups and discuss customer selected topics - 100% sharing.
Demand Management Course 2016	EX1241	Training - Doc	theWorX	This course will provide an overview of Clarity PPM Demand Management functionality. Topics include: * What is Demand Management? * Accessing and Creating Ideas * Staffing the Idea Team * Creating and Approving Idea Financial Plans * Idea Conversion to another Investment Type * Accessing and Creating Incidents * Adding Incident Tasks to a Project
Demand Management Overview - RegoU 2015	EX1007	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on Demand Management. The presentation provides an overview of Clarity PPM Demand components, the value of Demand Management, possible challenges, and Rego Keys to Success.

Name	ID	Work Type	Location	Long Description
Deploying Jaspersoft Reports	EX1351	Presentation	theBasix	Course description: "Are you struggling with deploying Jaspersoft reports between environments? This class will walk through the process and provide some tips and tricks from the experts." Download file is the slide deck used during the presentation.
Direct Linking to Files V13	EX0662	Technical Trick	theWorX	This 'Tech Trick' demonstrates how to link files located within the Knowledge Store directly to an HTML Portlet in Clarity PPM.
Document Management	EX1352	Presentation	theBasix	Course description: "How are other companies storing or managing documents? This session will discuss options for using native Clarity PPM, linking to SharePoint, connecting directly to SharePoint, using Google docs, as well as other options. This session will also discuss options for document approval workflows within Clarity PPM for both collaborative documents and attachment fields." Download file is the slide deck used during the presentation.
Does Your Organization See the Value in PPM? - white paper	EX1621	Presentation	theBasiX	Does Your Organization See the Value of PPM? The Essential Guide to Building Your Business Case How do you define the value of PPM at all levels, from the individual manager to the company at large? How do you help small groups, large organizations, and key individuals catch, support, and execute on that vision? In this white paper, we'll discuss two key components of selling the value of PPM.
Dynamic Links in Portlets	EX1059	Technical Trick	theWorX	This Tech Trick allows the ability to link anywhere within the Clarity PPM environment from a custom portlet link, even if it is not a standard OOTB link option. For example, you could link to a Departments page or directly to a timesheet even though these are not standard OOTB links to choose from when creating custom portlets. This trick works in Clarity PPM versions 12, 13 and 14 for both SQL and Oracle environments.
Effective Resource Management Planning - Webinar	EX1582	Presentation	theBasiX	When we're managing resources, the longer we stare at functions, capacities, and calendars, the more our eyes glaze over. Happily, there's a point of diminishing returns. We should only do a certain amount of resource planning. Join Rego's senior consultants Sara Garvey and Joe Almeida for a discussion on how to jump-start resource planning, coordinate processes, and incorporate the best practices of our most successful clients.
Email a Flat File | Lab	EX1353	Presentation	theBasix	Course description: "Do you have users that just want an XLS or CSV file emailed to them with data? This session will be a hands-on lab to create a workflow process that will pull data from Clarity PPM and email that data in a file to a user or group of users." Download file is the slide deck used during the presentation.
Email Process Instance Errors	EX0044	Workflow Job	theWorX	The Email Process Instance Errors workflow process will email a selected group within Clarity PPM informing them of process errors that are currently in the system. The selected group is input through a gel parameter so it may be easily changed. This workflow helps to resolve errors quickly by emailing group members of the errors within the system so they may take action immediately.
Enhancing Application Performance - RegoU15	EX1043	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on enhancing Clarity PPM performance with a review of root causes and quick solutions.
Enhancing Application Performance: RegoU February 2014	EX0840	Presentation	theBasiX	RegoU Presentation from February 2014. Application performance always has the potential to burden a Clarity PPM instance and discourage users. In this session, Rego's team of Clarity PPM experts will review the root causes of Clarity PPM performance issues and help you identify steps to take that will improve performance within the application and supporting infrastructure.
Entertaining Communications Portlet	EX1062	Portlet	theBasiX	This was created as a communications portlet with a bit of a twist. Timely in nature, but fun none the less, we hope your team enjoys.
Estimation | Best Practices - RegoU 2018	EX1550	Presentation	theBasiX	Does project and idea estimation take too long and lack visibility? This class will address one of the most common pain points within organizations: how to involve the right people within a timely project estimate. Learn some Rego best practices for defining, calculating, and modifying idea and project estimates, so you can increase throughput and ROI.
Excel and Clarity PPM | Integration	EX1354	Presentation	theBasix	Course Description: "No matter how hard we try, many organizations cannot pry Excel out of the hands of project and resource managers. In this class we will explore possibilities that give up the battle and embrace Excel as a great data entry tool. We will show some neat case studies on quick Excel integrations deployed at clients, as well as IT-ROI's robust Excel connector." Download file is the slide deck that was used for the presentation.

Name	ID	Work Type	Location	Long Description
Excel and Clarity PPM | Integration - RegoU 2016	EX1144	Presentation	theBasiX	No matter how hard we try, many organizations cannot pry Excel out of the hands of project and resource managers. In this class we will explore possibilities that give up the battle and embrace Excel as a great data entry tool. We will show some neat case studies on quick Excel integrations deployed at clients, as well as IT-ROI's robust Excel connector.
Excel and Clarity PPM | Working Together - RegoU 2018	EX1493	Presentation	theBasiX	No matter how hard we try, many organizations cannot pry Excel out of the hands of project and resource managers. In this class we will explore possibilities that give up the battle and embrace Excel as a great data entry tool. We will show some neat case studies on quick Excel integrations deployed at customers.
Excel Document Writer	EX0252	Technical Trick	theWorX	The Excel Document Writer is a C# application to create interim Excel files that would be used to manage projects while the Clarity PPM instance would otherwise be unavailable. The application takes connection information and a query and creates a separate Excel file for every row in the result. Using this program, administrators will be able to access Clarity PPM data and export it to an Excel file while the application is unavailable.
Executive Dashboard	EX0045	Portlet	theBasiX	The Executive Dashboard portlet displays information regarding projects the user has access to. It provides a one-stop place for the PMO or management to view all critical information about projects. The portlet not only displays status indicators as well as dates for late items, variances and days late, but also displays the project status fields from the Status Report sub-object.
Executuve Sponsorship | Driving Long-Term Success	EX1355	Presentation	theBasix	Course description: “What can leaders do after a Clarity PPM deployment to ensure continued success of the product? This session will discuss how sponsors can drive compliance within the organization through continued involvement. Strong sponsorship is the key to long term success.” Download file is the slide deck used during the presentation.
Exempt Hours Cost Adjustment Process	EX1065	Workflow Job	theWorX	This is an automation to adjust cost in financials (WIP) based on standard weekly hours. Process adjust only cost in WIP where hours per week posted is greater than standard hour. Posted hours in timesheet and in WIP remain untouched. Process takes few input parameters as explained below: - wkStdHour: Standard Weekly Hour, this can be changed in process gel parameter based on organisation requirement. Default set to 40 hours. - xogBatchSize: XOG batch size, used to upload data in batches to avoid high memory and performance issues. Default batch size set to 50 records. - username: User process uses for uploading data. Default set to admin. Process uses an external custom parameter, which is added to hold process last run time, so that process takes care of all the posted timesheets beyond last successful run of the process. This gives an easy hold to admin team so that they can adjust the time as needed at time time of deployment and later. Deployment of this include a custom object with the required parameter.
Experts Unplugged - Uncovering Dashboards - RegoU 2015	EX1014	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on effective use of Dashboard portlets within Clarity PPM. The presentation starts with an overview of the dashboards, then covers benefits, levels, effective delivery, technology, out of the box dashboards, and some Rego created customer requested dashboards.
Export Hierarchical Portlet to Excel	EX0997	Technical Trick	theWorX	This document provides an overview of how hierarchical portlets can be exported to MS Excel. The code of a sample hierarchical portlet is explained. The sample portlet shows a list of projects and the tasks under each project along with actual and assignment hours. The portlet can also be filtered by project and project manager.
Export Options QRC	EX1235	Training - Doc	theBasiX	A Quick Reference Card that reviews the various options for exporting data from Clarity PPM. The Options icon allows the user to Configure, Multi-sort and Export to Excel list view data. Certain portlets may have more or fewer options available depending on the type of data displayed.
External BI Extracts	EX1356	Presentation	theBasix	Course Description: “Does your organization have an external BI tool like Cognos, Tableau, Domo, or Qlikview? This session will review strategies for getting data into your corporate BI tools.” Download file is the slide deck used during the presentation.
Financial Management | Best Practices	EX1357	Presentation	theBasix	Course description: “Do you want to know the best practices for implementing financial management? In this class, we’ll discuss reasons for using financial management and what you need to start.” Download file is the slide deck used during the presentation.
Financial Management | OOTB Introduction - RegoU 2018	EX1494	Presentation	theBasiX	Do you want to understand the OOTB configuration and functionality of financial management? In this class, we will review the OOTB objects, views, views, and functions of financial plans, rates, and other related areas.

Name	ID	Work Type	Location	Long Description
Financial Management | Round Table - RegoU 2018	EX1495	Presentation	theBasiX	Do you want to talk to other customers that are using or plan to use financial management? In this moderated Round Table where customers can share experiences and provide insights on process, configurations, challenges, and successes. We will divide into small groups and discuss customer selected topics - 100% sharing.
Financial Management Overview - RegoU 2015	EX1008	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on Clarity PPM's Financial Management functions. The presentation starts with an overview of the financial components and then covers the value of financial management, challenges and concludes with Rego's Keys to Success.
Financial Summary by Charge Code - Graph	EX0243	Portlet	theWorX	The Financial Summary by Charge Code - Graph portlet displays yearly charge code financial information across all projects in a bar graph. This portlet provides management with a snapshot of all projects' financial information totaled and sorted by expense, capital, depreciation, benefit, and net cash flow. The depreciation is calculated based on a straight line method. The user may filter on OBS unit and/or portfolio to narrow down the search results.
Financial Summary by Charge Code - Graph Stacked	EX0241	Portlet	theWorX	The Financial Summary by Charge Code – Graph Stacked portlet displays yearly charge code financial information across all projects in a stacked bar graph. This portlet provides management with a snapshot of all projects' financial information totaled and sorted by expense, capital, depreciation, benefit, and net cash flow. The depreciation is calculated based on a straight-line method. The user may filter on OBS unit and/or portfolio to narrow down the search results.
Financial Summary by Charge Code - Grid	EX0254	Portlet	theWorX	The Financial Summary by Charge Code – Grid portlet displays yearly charge code financial information across all projects. This portlet provides management with a snapshot of all projects' financial information totaled and sorted by expense, capital, depreciation, benefit, and net cash flow. The depreciation is calculated based on a straight-line method. The user may filter on OBS unit and/or portfolio to narrow down the search results.
Financial Summary By Cost Type - Graph	EX1650	Portlet	theWorX	The Financial Summary by Cost Type - Graph provides a visual stacked graph for each years financial picture beginning with current year and going forward into the future. It will show the user where they need to concentrate their efforts in order to meet financial commitments.
Financial Summary by Cost Type - Graph Stacked	EX1675	Portlet	theWorX	The Financial Summary by Cost Type - Graph Stacked provides a visual stacked graph for each years financial picture beginning with current year and going forward into the future. It will show the user where they need to concentrate their efforts in order to meet financial commitments.
Financial Summary by Cost Type - Grid	EX1676	Portlet	theWorX	The Financial Summary by Cost Type - Grid is very beneficial as it provides actual numbers for each years financial picture beginning with current year and going forward into the future. It will show the user where they need to concentrate their efforts in order to meet financial commitments.
Financial Summary by Transaction Class - Graph	EX0244	Portlet	theWorX	The Financial Summary by Transaction Class - Graph provides a visual graph for each years financial picture beginning with current year and going forward into the future. It will show the user where they need to concentrate their efforts in order to meet financial commitments.
Financial Summary by Transaction Class - Graph Stacked	EX1684	Portlet	theWorX	This stacked bar graph portlet displays the financial summary by transaction class for the current and future fiscal annual periods. Filters are provided for: 1. OBS 2. Portfolio
Financial Summary by Transaction Class - Power BI	EX1667	Report	theWorX	The Financial Summary by Transaction Class provides a visual graph for each year's financial picture for multiple years. Report contains the following items: KPIs: Displays total benefit, capital, expense and net cash flow for the selected filter criteria Grid: Displays year wise break up of benefit, capital, expense and net cash flow for the selected filter criteria Graph: Benefit, capital, expense and net cash flow are depicted in graphical way for multiple years. This report will show the user where they need to concentrate their efforts in order to meet financial commitments. User can further narrow their search by OBS Type & Path.

Name	ID	Work Type	Location	Long Description
Financially Enable Roles	EX0250	Configuration Module	theWorX	The Financially Enable Roles modification provides the steps needed to financially enable roles. Utilizing this modification, project managers are able to estimate cost plans by staffing a role that is financially enabled. The document outlines all steps needed to financially enable roles; including the lookup, object, attributes, and processes.
Finding Early Success in Agile - Webinar	EX1608	Presentation	theBasiX	If you're a PPM user or developing PPM practices for bimodal development and have small Agile groups in your organization, or if you've moved to Agile and are now considering Scaled Agile, this webinar is for you. If you've been anxious to know how PPM tools and practices designed for waterfall seamlessly integrate with Agile and Scaled Agile practices and tools, we're here to help. Moving to Scaled Agile is a serious undertaking. Let the expert guides from Rego Consulting and ICON help clear the way as they discuss things you should consider, roadblocks to successful transition, how Agile works with Clarity PPM and CA Agile Central, and tips for a better payoff. Join Rego's Rob Greca and Patrick Finkler along with Charlene Cuenca from ICON as they discuss moving to Scaled Agile and show you how a major grocery store chain successfully made the transition.
Forecasted Utilization by Practice	EX1679	Portlet	theWorX	This Bar Chart Portlet displays a vertical bar for every Practice (Resource OBS) per Month. The bar represents the Utilization % (Resource Allocations divided by Resource Availability). Filters are provided for Resource OBS (Units and Descendants) and the date range to be displayed.
Forecasted Utilization by Project	EX1693	Portlet	theWorX	
Forecasted Utilization by Resource	EX1694	Portlet	theWorX	
From XOG to a Page	EX1100	Technical Trick	theBasiX	So, you have the portlet xogged in, what now? This guide will show you how to create a page, add the portlet to the page, and add the page to the menu. This activity requires the appropriated admin rights to add content to Clarity PPM.
Full License Count by OBS	EX0919	Portlet	theWorX	This portlet allows you to view the resources that are consuming Full license counts as well as allowing you to filter by resource OBS. This portlet also displays the last date that the resource logged into the tool so that we can see if the resource hasn't logged in for months. • Note: As of Clarity PPM version 13.2, Manager license was renamed to Full license.
Funnel Health - BT	EX1083	Portlet	theBasiX	Funnel Chart displays aggregated counts of Ideas by "Idea Progress", a custom attribute. Chart shows Idea Progress names in legend, and count total is available as a mouse-over. No filters available on this portlet.
GEL Scripts | Advanced	EX1358	Presentation	theBasix	Course description: "Are you ready to take your GEL scripting skills to the next level? This class will teach you how to XOG data in and out of objects, perform integrations, pass or receive FTP files, and handle errors effectively." Download file is the slide deck used during the presentation.
GEL Scripts | Advanced - RegoU 2016	EX1145	Presentation	theBasiX	Are you ready to take your GEL scripting skills to the next level? This class will teach you how to XOG data in and out of objects, perform integrations, pass or receive FTP files, and handle errors effectively.
Gel Scripts | Advanced - RegoU 2018	EX1496	Presentation	theBasiX	Are you ready to take your GEL scripting skills to the next level? This class will teach you how to leverage Java within GEL, manipulate or produce flat files, and handle errors effectively.
GEL Scripts | Beginner	EX1359	Presentation	theBasix	Course description: "Do you want to start taking advantage of Clarity PPM's powerful process engine, using GEL script steps? This class will teach you the basics of leveraging GEL within your workflow process. It's one of the most powerful and underutilized capabilities in Clarity PPM for updating objects, sending emails, and XOGing." Download file is the slide deck that was used during the presentation.
GEL Scripts | Beginner - RegoU 2016	EX1146	Presentation	theBasiX	Do you want to start taking advantage of Clarity PPM's powerful process engine, using GEL script steps? This class will teach you the basics of leveraging GEL within your workflow process. It's one of the most powerful and underutilized capabilities in Clarity PPM for updating objects, sending emails, and XOGing.
GEL Scripts | Intermediate - RegoU 2018	EX1497	Presentation	theBasiX	Do you have a basic understanding of GEL scripts but need to a better understanding of how they work? This class will teach you how to XOG data in and out of objects in GEL as well as perform basic emails inside GEL.
GEL Scripts | Introduction - RegoU 2018	EX1498	Presentation	theBasiX	Have you never used GEL within Clarity PPM? This class will teach you the basics of leveraging GEL within your workflow process. It's one of the most powerful and underutilized capabilities in Clarity PPM for updating objects, sending emails, and XOGing. This class is designed for those that have never used GEL before.
General Navigation QRC	EX1236	Training - Doc	theBasiX	Two Quick Reference Cards to assist with the general navigation of Clarity PPM.

Name	ID	Work Type	Location	Long Description
General Overview and Navigation - PPT	EX0191	Training - Doc	theBasiX	The General Overview and Navigation training document provides a high-level overview of navigating and understanding basic screens within Clarity PPM. This document is helpful for adjusting new users to the different functionality and screens the user may encounter during daily usage of the system. The guide provides information on how to login to the system, navigate pages, portlets and functions, icon explanation, account settings and altering notifications within the system.
Getting Started with Data Model - RegoU15	EX1020	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on Clarity PPM Data Model. The Presentation covers SQL Basics, Clarity PPM Core Tables, Investments, Resources/Users, Lookups, Time Reporting and Time Slices.
Getting Started with GEL Scripts - RegoU15	EX1021	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on using GEL Scripts. The presentation provides an introduction to the benefits of GEL Scripts, and introduction to their use in Clarity PPM and dives into scripting and scripting exercises.
Getting Started with NSQL - RegoU15	EX1022	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on using NSQL to create portlets. Agenda covers creating custom tab on Overview, Portlet NSQL Based vs Object Based, NSQL Queries, and Parameters.
Global Action Items	EX1003	Portlet	theWorX	The Global Action Items portlet will help users and Clarity PPM admins to keep track of action items in the Clarity PPM system. This is useful to keep track of Timesheet Approval through Action Item or any other Action Item related workflows. The portlet displays Name, Type Assignee, Created by, Due Date, Health and Status of the Action Items as default columns. The portlet provides Project, Project Manager, Project OBS, Assignee, Status and Due Dates of the Action Items as default filters.
Goal Analysis - BT	EX1076	Portlet	theBasiX	Part of our Business Transformation collection, this portlet relates exclusively to Benefit costs in the Portfolio and its investments. Portlet is a combination of Line Chart and Vertical Bar Charts. It displays data for one or more portfolios depending on rights and filters. Green Line represents Portfolio Target Benefits. Light blue bar represents aggregation of investment Planned Benefits. Dark blue bar represents aggregation of Investment Realized Benefits (actual benefits). Filtering is available for Above or Below Waterline investments OR all portfolio Investments. May also filter on Portfolio values as well as Plan values. Filtering also available for Active vs Inactive Portfolios.
Grant Approve Time to Proxy	EX0050	Workflow Job	theWorX	The Grant Approve Time to Proxy process utilizes the proxy feature within Clarity PPM to assign timesheet approval and edit rights to a proxy for any resources that the user is the current resource manager for. The process, when run, will also remove any timesheet approval and edit rights for any users if the proxy has been removed or the resource manager has changed. This process is used for resource managers that will be out of the office.
Grant Booking Manager Rights to Book Resources	EX0143	Workflow Job	theWorX	The Grant Booking Manager Rights to Book Resources workflow provides a resource's Booking Manager with the rights to hard book a resource to a project. This workflow will remove unused rights, and then grant the rights needed to allow for booking of resources. The workflow also has the ability to add rights to not only the resource but also the resource manager, and resources that are assigned as proxies. If this functionality is not needed, it can easily be removed.
Grant Edit Skill and Calendar Rights	EX0051	Workflow Job	theWorX	The Grant Edit Skill and Calendar workflow process grants the ability for the user's proxy, resource manager, booking manager, and resource(s) to edit both the skill and calendar sections. The query can be easily modified to remove any of the users that receive the ability. For example, some organizations may only want to grant these rights to resource managers and his or her proxy. This workflow simplifies the task or updating a resource's calendar or skill set by allowing multiple people to govern them. Not only will the workflow add in any new rights, but it will also check for rights that no longer exist (resource manager has changed, etc).
Grant Edit Time to Proxy	EX0052	Workflow Job	theWorX	The Grant Edit Time to Proxy process utilizes the proxy feature within Clarity PPM to assign timesheet edit rights to a proxy for any resources that the user is the current resource manager for. The process, when run, will also remove any timesheet edit rights for any users if the proxy has been removed or the resource manager has changed. This process would allow a resource manager to designate a subordinate the ability to enter time on other resources' behalf while still going to the resource manager for approval.
Grant PM Collaboration Manager Rights	EX0144	Workflow Job	theBasiX	The Grant PM Collaboration Manager Rights workflow process can be run through the "Execute a Process" job. The workflow will execute a query that gives a Project Manager the Collaboration Manager rights to their projects. Often times, PMs are not set as Collaboration Managers when the project is created. This script can be run to automatically give a PM the Collaboration Manager rights to their projects, without having to go through the projects one by one.

Name	ID	Work Type	Location	Long Description
Grant Project Edit Rights	EX0053	Workflow Job	theWorX	The Grant Project Edit Rights workflow process allows a project manager to grant project edit rights to another user without contacting an administrator. The workflow uses the Out-of-the-box field for Business Owner. The script starts when the field is updated. It will assign project edit rights to whichever user is added to the Business Owner field. This process can be modified to grant project edit rights to any user within a project field.
Grant Resources Timesheet Edit Rights	EX0257	Workflow Job	theWorX	The *Grant Resources Timesheet Edit Rights* process will grant each resource timesheet edit instance rights to his or her own timesheets. This process will not remove any existing timesheet edit instance rights.
Grant RM Calendar and Time Rights	EX0054	Workflow Job	theWorX	The Give RM Calendar & Time Rights workflow process can be run through the "Execute a Process" job. The workflow will execute a query that gives a Resource Manager Calendar Edit and Timesheet Edit rights for their resources. These rights are not inherent for Resource Managers when they are named as an individual's resource manager.
Grant RM Timesheet Edit Rights	EX0055	Workflow Job	theWorX	The Grant RM Timesheet Edit Rights workflow process can be run through the "Execute a Process" job. The workflow will execute a query that gives a Resource Manager Timesheet Edit rights for their resources. Timesheet Edit rights are not inherent for Resource Managers when they are named as an individual's resource manager.
Grant Team Project Edit Rights	EX0249	Workflow Job	theWorX	The Grant Team Project Edit Rights workflow allows a project manager to grant Project – Edit Management rights to all users staffed on the project. This workflow saves not only the project manager time by allowing all users on the project to update information, but also saves the administrator time from granting each resource these rights individually. The process will also remove any rights from members that have been removed from the project.
Guide to Mapping Clarity PPM Fields to MSP	EX0811	Training - Doc	theWorX	When a project schedule is opened from Clarity PPM to Microsoft Project, specific fields from Clarity PPM are “mapped” to specific fields in Microsoft Project. This allows the Project Manager to view and update the same project data in both Clarity PPM and Microsoft Project. Most fields, that are common between the two applications, have been identified and mapped in the default mapping. For example, the Clarity PPM “Project Start Date” has been mapped to the MS Project “Start Date”. Even though most fields have been mapped, there may be a need to create additional mappings to allow project managers to update custom Clarity PPM fields in Microsoft Project and then save those updates back to Clarity PPM.
Hidden Automation: RegoU February 2014	EX0843	Presentation	theBasiX	RegoU Presentation from February 2014. GEL scripting is one of the most powerful but underutilized capabilities in Clarity PPM. In this session, you will learn how to create GEL scripts that perform SQL updates, send formatted emails, XOG (import/ export) data in and out of objects, and perform integrations, such as simple GEL that FTPs, loads to a table, and XOGs non labor with error handling.
Hiding Save Button from Sub Objects	EX1426	Technical Trick	theWorX	Often, you would want to disallow users from making edits to stay on the same page after changing the data by clicking Save. By forcing the users to click Save and Return, they are forced out of the page. For the above-mentioned reason, the Clarity admin can add the code in the attached tech-trick document, and that will hide the Save button from being displayed.
Hours and Cost by Vender - Grid	EX0256	Portlet	theWorX	The Hours and Cost by Vendor - Grid portlet displays vendor hour or costs by month grouped by vendor. Using this portlet, management is provided with a quick overview of vendor costs or hours by month for a set of time without running a report or navigating to each resource individually. This portlet uses the monthly actual timeslices. The user may filter by vendor, vendor ID, date, and hours/cost in addition to the start/finish and hours/cost. Once populated, the grid will display all vendors that currently have hours/cost for the selected time frame.
Hours and Cost by Vendor - Graph	EX0255	Portlet	theWorX	The Hours and Cost by Vendor - Graph portlet displays vendor hour or costs by month. Using this portlet, management is provided with a graphical representation of vendor costs or hours by month for a set of time without running a report or navigating to each resource individually. This portlet uses the monthly actual timeslices. Additionally, the user must select a date range and whether to display hours or costs. Once populated, the graph will display all vendors that currently have hours and cost for the selected date range.
How Companies are Using Clarity PPM for Application Portfolio Management - RegoU 2015	EX1015	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on how other companies are using Clarity PPM to manage application portfolios. The agenda covers an overview, definitions, business value, key requirements and best practices.

Name	ID	Work Type	Location	Long Description
How Pitney Bowes Used Agile to Automate Time Entry - Webinar	EX1586	Presentation	theBasiX	Wouldn't it be great if people could focus on their jobs, not processes and tools? When the global commerce company Pitney Bowes integrated CA Agile Central with Clarity PPM, that's what they were after—more business value for 250 product lines and 1,200 engineers. Join the Pitney Bowes Portfolio Management & Agile Teams—Gale Persil and Larry Savitsky—in a conversation with Rego's Josh Leone and CA's Dave Sprague about why Clarity PPM was the right fit for Pitney Bowes' hybrid Agile environment, and how they used innovative Rego technology like automated time collection and submittal, so users could spend less time wrestling tools and more time building products.
How to Compare JRXMLS for Jaspersoft	EX1637	Technical Trick	theBasiX	This document's purpose is to help the reader compare jrxmls for Jaspersoft.
How to Copy and Modify an OOTB Jasersoft Report	EX1641	Technical Trick	theBasiX	This document's purpose is to help the reader copy and modify a Clarity PPM report. This process will allow the user to modify a report without removing or modifying the original report.
How to Find Content in the RegoXchange	EX0975	Training - Video	theBasiX	There is no video Download Available, Only a YouTube viewable link. In this video, Eric Taylor, the Product Manager for the RegoXchange Content Library at Rego Consulting, shows us how to use filtering to find content within the RegoXchange. For free Clarity PPM educational resources, visit our blog, follow us on social media, or browse this nonprofit library, the RegoXchange.
How to Have Different Role Rates without Different Roles	EX0962	Technical Trick	theBasiX	Many times Roles are spread out geographically or by function and these Roles will have different rates. For example, a developer in India may charge $25/hour vs a Developer in US may charge $50/hour. When the project team has a requirement of several developers, the PM will have to add a region specific role (Developer-US, Developer-India) so that the right rates can be applied when a cost plan is created. This creates a challenge in terms of Resource Management. As the Demand and Capacity can be spread between different region specific roles. Proper configuration on the Rate Matrix can allow you to have one Role name but different rates based on Location or Department. This allows greater flexibility and takes away the redundancy of Role Names. You can do so with the Project Team Member Properties.
How to Hire the Right Project Manager - Webinar	EX1595	Presentation	theBasiX	Finding the right project manager can be tricky. How do you know which candidates have the appropriate leadership, forecasting, and problem solving skills? Interviewing strategies can make the difference. This webinar discusses important ways you can prepare for a project manager interview. It points out the hazards to sidestep and best practices for identifying candidates with the right proficiency. The information is based on a recent collection of best practices and experiences pulled from Rego's team of practitioners, including past PMO Directors, Team Leads, and VPs -- all tasked with finding the right people to deliver on their companies' biggest investments.
How to Hire the Right Project Manager - white paper	EX1622	Presentation	theBasiX	Finding the right project manager can be tricky. How do you know which candidates have the appropriate leadership, forecasting, and problem-solving skills? Interviewing strategies can make all the difference. This paper discusses important ways you can prepare for a project manager interview. It points out hazards to sidestep and best practices for identifying candidates with the right proficiency.
How to Launch Your PMO - white paper	EX1618	Presentation	theBasiX	This paper will help you launch a PMO—or facelift the one you've got—by making sure your PMO charter can handle strategic heavy lifting. It covers everything from getting stakeholder buy-in to achieving successful adoption throughout your organization.
How to Modify Colors in a Chart - Jaspersoft Dev	EX1683	Technical Trick	theWorX	This Tech Trick covers instructions for modifying the default colors of a Chart in Jaspersoft Studio Reports using a dynamic expression. It includes step-by-step instructions for an example bar chart color change.
How to Register for the RegoXchange Content Library	EX0974	Training - Video	theBasiX	There is no video Download Available, Only a YouTube viewable link. In this video, Eric Taylor, the Product Manager for the regoXchange Content Library at Rego Consulting, shows us how to register as a new user for the RegoXchange. For free Clarity PPM educational resources, visit our blog, follow us on social media, or browse this nonprofit library, the RegoXchange.

Name	ID	Work Type	Location	Long Description
How to Run a Jaspersoft Report with Rest API	EX1659	Technical Trick	theWorX	This tech-trick defines how to run a Jaspersoft report using Rest API.
How to Select the Best PPM Solution - white paper	EX1620	Presentation	theBasiX	Project & Portfolio Management is a Significant Investment. How do you get the most return on your investment? How do you squeeze the most value out of the processes and functionalities it provides? How do you make sure your PPM assets align with your current and future objectives? Like many business problems, the answer lies partly in asking the right questions. So let’s start there. In this white paper, we’ll review a broad array of questions you should be asking your PPM vendor to make sure you’re making the right choices, whether you’re considering a potential implementation or optimizing your current PPM environment.
How to Set Up Colors for a HTML5 Graph	EX1639	Technical Trick	theBasiX	This tech-trick details the steps to set colors for an HTML5 Graph.
How to Use a RegoXchange Product Page	EX0973	Training - Video	theBasiX	There is no Download Available, Only a YouTube viewable link. In this video, Eric Taylor, the Product Manager for the RegoXchange Content Library at Rego Consulting, shows us how to use a RegoXchange Product Page to view, download, print, favorite, and request solutions. For free Clarity PPM educational resources, visit our blog, follow us on social media, or browse this nonprofit library, the RegoXchange.
How to Use Markup in a Field - Jaspersoft Dev	EX1682	Technical Trick	theWorX	In Jaspersoft Studio, Static Text and Text Fields can display text with markup instead of plain text. This allows a wide variety of customization to how the text is displayed. This Tech Trick provides Instructions on how to use this feature of Jaspersoft Studio.
How to Use the Data Warehouse - Webinar	EX1609	Presentation	theBasiX	Are you curious about the Clarity PPM Data Warehouse? This class will teach you how to navigate your way around the data model, understand the jobs populating int, and compare it to the various existing data mart and core Clarity PPM aggregation tables.
HTML | Advanced Portlets	EX1360	Presentation	theBasix	Course description: “Have you ever wanted to build portlets that were not limited by the out-of-the-box portlet types? This class will explore some of the options to build eye-popping portlets using HTML, including calendars, Kanban boards, tile-based project lists, and some special Star Wars themed communication portlets.” Download file is the slide deck used during the presentation.
HTML Portlets | Advanced - RegoU 2018	EX1499	Presentation	theBasiX	Have you ever wanted to build portlets that were not limited by the out-of-the-box portlet types? This class will explore some of the options to build eye-popping portlets using HTML, including calendars, Kanban boards, tile-based project lists, and some special Star Wars themed communication portlets.
HTML Process Controll Center	EX0796	Portlet	theWorX	The Process Control Center is an HTML portlet that allows designated users (Clarity PPM Administrators) to start a process by simply choosing the process name from a dropdown list and clicking the ‘Start Process’ button.
Idea Allocation Uploader	EX1284	configuration & App	theWorX	The idea allocation uploader allows you to import in allocations from an external Excel spreadsheet. Populate an Excel template with required fields then import them directly from the Clarity UI. Once imported you’ll see the allocations right on the Team tab of the Idea.
Idea List - BT	EX1086	Portlet	theBasiX	Part of the Business Transformation collection, this grid portlet displays idea details for all ideas (active and inactive) and all status conditions. This is an editable portlet based on the Ideas data provider. Filterable by OBS structure, Active/Inactive, and Status.
Ideas by Business Unit - Pie (JS Report)	EX1435	Report	theWorX	Ideas by Business Unit report is a pie chart that displays count of ideas per business unit. This report gives a holistic view of the idea pipeline in an Organization and provides information on number of ideas converted, approved & unapproved per business unit. You can further narrow your search by Idea Status, Ideas Start Date and Is Idea Active?.
Ideas by Delivery	EX1423	Portlet	theBasiX	This is a great way to review demand by type and evaluate where demand is coming from and who will be impacted. Displays a bar graph of all ideas group by type.
Ideas by Delivery - Drilldown	EX1424	Portlet	theWorX	This is a great way to review demand by type and evaluate where demand is coming from and who will be impacted. Displays a bar graph of all ideas group by type. Provides the ability to drill down into a bar to see which ideas are part of the bar.
Ideas by Department	EX1067	Portlet	theWorX	Pie Chart displays count of all Ideas by Department. Filterable by Active and Inactive, by OBS, and by Department Manager. Data label and mouseover show department counts. Legend displays department names.
Ideas by Department - Pie (JS Report)	EX1436	Report	theWorX	Ideas by Department report is a pie chart that displays count of ideas by department. Mouse over on the pie chart displays idea count for that department. You can further narrow your search by OBS Type & Path , Idea Status, Idea Start Date and Is Idea Active?.

Name	ID	Work Type	Location	Long Description
Ideas by Priority	EX1068	Portlet	theWorX	Pie Chart displays total Ideas by Priority, filterable by Active / Inactive and by OBS structure. Data Label and Mouse-over label display counts by Priority. Legend shows Priority Name. Chart also shows Ideas with No Priority.
Ideas by Priority - Pie - (JS Report)	EX1437	Report	theWorX	Ideas by Priority report is a pie chart that displays ideas count by priority. Mouse over on the pie chart displays idea count for that priority. You can further narrow your search by OBS Type, OBS Path, Idea Status, Idea Start Date and Is Idea Active?.
Ideas by Sponsor	EX1302	Portlet	theWorX	This portlet uses a bar graph to show the count of ideas by stage - grouped by the sponsor OBS. The X-axis displays the count and the Y-axis denotes the sponsor.
Ideas by Stage	EX1066	Portlet	theWorX	Pie Chart displays count of all Ideas by stage. Filterable by Active and Inactive, and also by OBS. Data label and mouse-over show Stage counts. Legend displays Stage names. This portlet assumes the use of the custom Stage attribute on Idea object.
Ideas by Stage (JS Report)	EX1438	Report	theWorX	Ideas by Stage report is a column chart that displays ideas count by its Stage. Legend displays Stage names. Numerical value on the column bar indicates the idea count for that stage. You can further narrow your search by OBS Type & Path, Idea Status, Idea Start Date and Is Idea Active?.
Image Preview from Attachment File	EX1651	Technical Trick	theBasiX	There are many times users want to see the preview of file uploaded on attachment attribute. This Technical Trick will illustrate the steps for an Administrator to preview an attachment. This solution will help to preview PDF, Text file and Image(.png) file. For Microsoft word, PowerPoint and Microsoft Excel, it displays an icon.
Implementing Demand Management | Best Practices Round Table - RegoU 2016	EX1147	Presentation	theBasiX	Do you want to know the best practices for implementing demand management? In this moderated round table on best practices, we'll discuss configurations, incidents, and ideas.
Implementing Financial Management | Best Practices Round Table - RegoU 2016	EX1148	Presentation	theBasiX	Do you want to know the best practices for implementing financial management? In this moderated round table on best practices, we'll discuss setting up financial management, financial planning, and transaction processing.
Implementing Portfolio Management | Best Practices Round Table - RegoU 2016	EX1149	Presentation	theBasiX	Do you want to know the best practices for implementing portfolio management? In this moderated roundtable on best practices, we'll discuss reasons for using portfolio management and what you need to start.
Implementing Project Management | Best Practices Round Table - RegoU 2016	EX1150	Presentation	theBasiX	Do you want to know the best practices for implementing project management? In this moderated round table on best practices, we'll discuss managing projects, scheduling, and working with teams.
Implementing Resource Management | Best Practices Round Table - RegoU 2016	EX1151	Presentation	theBasiX	Do you want to know the best practices for implementing resource management? In this moderated roundtable on best practices, we'll discuss managing resources, requisitions, planning, and capacity.
Improve Project Quality and Efficiency - white paper	EX1616	Presentation	theBasiX	Effective resource management is vital for delivering successful and profitable projects. Get it right and costs will be controlled, objectives achieved, and deadlines met. Get it wrong and we run the risk of not just project timescales slipping but also margins and competitive advantages eroding. This paper looks at resource management best practices and how we can adopt practices to increase project quality, agility, and efficiency.
Improved PPM Process Maturity: RegoU February 2014	EX0844	Presentation	theBasiX	RegoU Presentation from February 2014. Clarity PPM is only as effective as the processes behind it. Learn the components of PPM process maturity and the importance of integration with any PPM tool. Come find out how Clarity PPM leaders are optimizing process and tool synergies within their organizations.
Inactive Resource Data Cleanup	EX0057	Portlet	theWorX	The Inactive Resource Data Cleanup portlet displays information for inactive resources that still have pending items on active objects: ~ Inactive User is the Project Manager ~ Inactive User is the Idea Manager ~ Inactive User is the Resource Manager ~ Tasks assigned to the user ~ Action items assigned to the user ~ Risks assigned to the user ~ Issues assigned to the user ~ Change requests assigned to the user Incidents assigned to the user
Inappropriate Project Date	EX0999	Portlet	theWorX	This grid portlet to show projects with finish or start date of project more than 20 years in future or past. The portlet automatically displays results when accessed. The user can apply filters to fetch the desired information.
Incident Dashboard	EX0058	Configuration Module	theWorX	The Incident Dashboard provides users with a quick overview of information on the incident and any tasks created from that incident to avoid navigation between the incident and project. The link to this dashboard is placed on the Incident object. Once clicked, three different portlets will be displayed: ~ The Incident Dashboard - Details portlet displays an overview of information about the incident. ~ The Incident Dashboard - Notes portlet displays any notes that are present in the Incident. ~ The Incident Dashboard - Assignments shows any assignments that have been created from the Incident.

Name	ID	Work Type	Location	Long Description
Incident Notes	EX0059	Portlet	theWorX	The Incident Notes portlet displays all of the notes that have been entered against Incidents in a single view. This allows users to more efficiently look at the notes, regardless of security rights, without having to enter each incident individually to view them.
Incident Trending	EX0060	Portlet	theWorX	The Incident Trending portlet all opened and closed incidents within a certain time frame. This portlet will show trends in incidents over previous months and allows for analysis of as to the root cause in a spike of incidents. The information may be filtered by date range, urgency and priority.
Incident Trending Volume Over Time	EX1064	Portlet	theWorX	This view depicts trends of created and resolved Incidents over time, grouped by month. The count of incidents opened is determined by the Created Date of the Incident, and the count of Incidents closed is determined by the Resolution Date of the Incident. The view is filterable by Priority and Urgency as well as a date range. NOTE: The values returned are the total sum for a given month, not a cumulative total over time.
Increase OBS Field Width	EX0955	Technical Trick	theBasiX	The OBS field length cannot be increased in Clarity PPM out of the box. If we have long OBS names it would be difficult to see the entire OBS path. However, by adding some CSS code within a UI theme we are able to increase the width of the OBS field. Increasing or decreasing the width number in the CSS code will either increase or decrease the length of the OBS field.
Increasing Clarity PPM Perception and Adoption - RegoU15	EX1028	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on how to increase the positive perception of Clarity PPM and its adoption. The agenda covers What is adoption, assessing your state of adoption, and keys to success.
Increasing Clarity PPM Perception and Adoption: RegoU February 2014	EX0846	Presentation	theBasiX	RegoU Presentation from February 2014. User implementation of Clarity PPM can sometimes be a challenge. With proper guidance from Rego’s team of experts, you will learn to communicate the value of Clarity PPM and increase user adoption within your organization. Rego’s team will reveal the strategies they use to drive adoption and ensure user input.
Increasing Data Compliance - RegoU 2018	EX1500	Presentation	theBasiX	Are you struggling to get data compliance within your instance of CAPPM? This class will talk about common compliance problems and discuss potential solutions to help your increase compliance within your organization.
Insider's Guide to Workflows - Webinar	EX1226	Presentation	theBasiX	In this workflows starter, we’ll show you case studies for great workflows, best practice designs, and how to extend your performance with workflows. Bring your questions and use this webinar to prep for its follow-up, when we'll build a workflow from scratch. To view the webinar, click here – http://event.on24.com/wcc/r/1129946/44CFAC37D25703C67AEF53672269A619
Integrating MSP with Clarity PPM: RegoU February 2014	EX0847	Presentation	theBasiX	RegoU Presentation from February 2014. Although Clarity PPM continues to offer more and more project management functionality in the browser, we continue to see organizations that want to leverage desktop tools such as MSP. The reality is that most PMs are familiar with MSP and your external contractors are probably all using MSP. So how do we get visibility into this data? The solution is to integrate MSP with Clarity PPM. In this session, Rego’s team will review the pros and cons of Open Workbench vs. MSP. They will offer best practices when integrating MSP with Clarity PPM, and share lessons learned from companies that support MSP today.
Integration Rules You Need to Know - Webinar	EX1225	Presentation	theBasiX	Make Clarity PPM integrations smooth when you join Josh Leone and Dave Matzdorf. In this webinar, the entertaining duo will cover common integrations, integration methods, and different tool options for use in your On Demand or On Premise environment. It’s tech talk without the technical language. To view the webinar, click here – http://event.on24.com/wcc/r/1160597/45508567606FF370E1C7FFF3DA83D216
Integrations | Most Popular - RegoU 2016	EX1153	Presentation	theBasiX	What integrations are the most requested and the most utilized? This class will review the most common interfaces to and from Clarity PPM, including best practice use cases and lessons learned from real implementations.
Integrations | Overview	EX1362	Presentation	theBasix	Course description: “Do you want to add interfaces to your Clarity PPM instance? This class will review the pros and cons of various integration methods and provide best practice on how to handle various interfaces. We’ll walk you through specific interface examples and showcase Rego’s pre-built interface sets you can leverage to reduce the time and cost of implementation.” Download file is the slide deck used for the presentation.
Integrations | Overview - RegoU 2016	EX1152	Presentation	theBasiX	Do you want to add interfaces to your Clarity PPM instance? This class will review the pros and cons of various integration methods and provide best practice on how to handle various interfaces. We’ll walk you through specific interface examples and showcase Rego’s pre-built interface sets you can leverage to reduce the time and cost of implementation.

Name	ID	Work Type	Location	Long Description
Integrations | Overview - RegoU 2018	EX1501	Presentation	theBasiX	Do you want to add interfaces to your Clarity PPM instance? This class will review the pros and cons of various integration methods and provide best practice on how to handle various interfaces. We'll walk you through specific interface examples and showcase Rego's pre-built interface sets you can leverage to reduce the time and cost of implementation.
Integraton | Most Popular	EX1361	Presentation	theBasix	Course description: "What integrations are the most requested and the most utilized? This class will review the most common interfaces to and from Clarity PPM, including best practice use cases and lessons learned from real implementations." Download file is the slide deck used for the presentation.
Interface Designs - Xcelsius Dashboards: RegoU February 2014	EX0867	Presentation	theBasiX	RegoU Presentation from February 2014. Strong visuals can help tell a compelling analytics story and get your recommendations implemented. Xcelsius dashboards have the ability to engage and communicate with your executives in appealing ways; however, you need to understand how and when to leverage them. Come find out how to create and modify Xcelsius dashboards within Clarity PPM to present your data in an intuitive, data-driven display.
Interface Strategies and Methods - RegoU15	EX1029	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on how create an interface with Clarity PPM. It reviews the starting points, variety of integration methods, and the available integration tools.
Interface Strategies and Methods: RegoU February 2014	EX0869	Presentation	theBasiX	RegoU Presentation from February 2014. Providing users with an intuitive, clean interface is one of the most important aspects of user adoption. Come to this session to learn how to optimize your Clarity PPM environment by enhancing the structure of your interface. There is always more than one way to do something, so we will go over the pros and cons of various strategies and methods. We will also dive into some details on how to structure larger interfaces, as well as look at XML code to create files and use APIs.
Intro to Clarity PPM Time Entry	EX0218	Training - Doc	theBasiX	The Clarity PPM Time Entry training document provides an overview of time entry within Clarity PPM. This introductory level presentation is designed to provide new users with the information needed to add tasks to a timesheet, submit the timesheet, and make adjustments to the timesheet.
Intro to Project Management - PPT	EX0192	Training - Doc	theBasiX	The Introduction to Project Management training document provides an overview of project management. This introductory level presentation is designed to provide new project managers or users with a quick synopsis of the key factors in project management.
Intro to Resource Management - PPT	EX0193	Training - Doc	theBasiX	The Introduction to Resource Management training document provides an overview of resource management. This introductory level presentation is designed to provide new resource managers or users with a quick synopsis of the key factors in resource management.
Introduction to Application Portfolio Management (APM) - Webinar	EX1607	Presentation	theBasiX	Every year IT leaders are tasked with driving down costs, being more efficient, and bringing greater value to the organization. "It takes a significant amount of time to manage enterprise wide applications, department applications, applications brought over with a new acquisition, and those rogue apps" said Jen Scarlato. "This webinar will introduce leaders to APM, show them how an APM strategy can significantly reduce costs, and then provide steps to get started." An organization's application portfolio, just like people, need periodic health checks. Companies often become bloated with applications that are redundant, outdated, or o longer providing value. Research by Garner, Forrester, and the Financial Times all suggest that an appropriate APM strategy frequently reduces application costs by one-third.
Introduction to Clarity PPM - Module 1: Clarity PPM Components	EX0169	Training - Video	theBasiX	This video describes Clarity PPM Components (modules) in a Powerpoint Slide Deck with Voice Over. It may be used as a high-level introduction to the various Clarity PPM Modules.
Introduction to Clarity PPM - Module 10: Configure the Overview Page	EX0184	Training - Video	theBasiX	This final video in the Introduction to Clarity PPM video series reviews how to configure the Overview: General page. The process to add and remove portlets is discussed, along with how to create new custom tabs, to which portlets may be added.
Introduction to Clarity PPM - Module 2: Navigating the Clarity PPM User Interface	EX0170	Training - Video	theBasiX	This video instructs the user how to navigate the Clarity PPM User Interface.
Introduction to Clarity PPM - Module 3: The Organizer	EX0171	Training - Video	theBasiX	This video instructs the user on use of Clarity PPM's Organizer, including the Action Items, Tasks, Calendar, Processes and Notifications tabs.
Introduction to Clarity PPM - Module 4: List Views and Filters	EX0172	Training - Video	theBasiX	This video instructs the user on the use of Clarity PPM's List Views, and how to user the filter associated with a list view.
Introduction to Clarity PPM - Module 5: Actions Drop Down	EX0173	Training - Video	theBasiX	This video provides an overview of the options found in the Actions Drop Down Menu, including Configure, Gantt, Multisort, Export to Excel, Export to PowerPoint and Edit Mode.

Name	ID	Work Type	Location	Long Description
Introduction to Clarity PPM - Module 6: Accounting Settings	EX0177	Training - Video	theBasiX	This video provides an overview of the options available via the Account Settings link in the left navigation, including Personal Information, Proxy, Font Settings, Notifications and Software Downloads.
Introduction to Clarity PPM - Module 7: Notifications	EX0181	Training - Video	theBasiX	This video provides an overview of the Notifications functionality within Clarity PPM. It includes details on accessing Notifications from the Notifications portlet on the overview screen, or from the organizer. Notifications preferences within Account Settings are also discussed.
Introduction to Clarity PPM - Module 8: Portlets vs. Reports	EX0182	Training - Video	theBasiX	This video provides an overview of the difference between Clarity PPM data displayed in portlets (within the browser) and Reports (external to the Clarity PPM system). It touches upon benefits of each, and when you might prefer to utilize one over the other.
Introduction to Clarity PPM - Module 9: Running a Report	EX0183	Training - Video	theBasiX	This video provides an overview of how to run the out-of-the-box reports in Clarity PPM. It touches on entering and saving Report Parameters, scheduling a report, report notifications and report sharing.
Introduction to Clarity PPM v14.2 - Module 1	EX0964	Training - Video	theBasiX	The first in a four-part video series giving end-users an introduction to using Clarity PPM. Module 1 covers: Clarity PPM Components, Navigating the User Interface and Configuring the Overview Page. To preview this video before downloading, follow this link to YouTube
Introduction to Clarity PPM v14.2 - Module 2	EX0966	Training - Video	theBasiX	The second in a four-part video series giving end-users an introduction to using Clarity PPM. Module 2 covers: List Views and Filters, Actions Drop Down Menus, and the Options Icon. To preview this video before downloading, follow this link to YouTube
Introduction to Clarity PPM v14.2 - Module 3	EX0968	Training - Video	theBasiX	The third in a four-part video series giving end-users an introduction to using Clarity PPM. Module 3 covers: Account Settings, the Organizer and Notifications. To preview this video before downloading, follow this link to YouTube
Introduction to Clarity PPM v14.2 - Module 4	EX0970	Training - Video	theBasiX	The fourth in a four-part video series giving end-users an introduction to using Clarity PPM. Module 4 covers: Portlets vs. Reports, Running a Report. To preview this video before downloading, follow this link to YouTube
Introduction to Portfolio Management V13	EX0203	Training	theBasiX	The Introduction to Portfolio Management training document provides an overview of portfolio management. This introductory level presentation is designed to provide new users of portfolio management with a quick synopsis of the key factors in portfolio management.
Invalid Transactions	EX0247	Portlet	theWorX	The Invalid Transactions portlet displays all of the transactions that did/will not post in Clarity PPM. The benefit of this portlet is that you can use the filter to select a specific project, resource, or error to display all transactions associated to your selection. There are several reasons a transaction may fail to post such as inactive resource, no location or inactive location selected on the Financial sub-page, project on hold, etc. To resolve the error, the user must go into the project or resource and make the noted change. Once all corrections are complete, the Post Transactions to Financials job must be run to evaluate the corrected WIP transactions to be sure the data is now complete and accurate. If additional incorrect data is found, the transaction will fail to post again and the new error/reason will display.
Investment Analysis - BT	EX1087	Portlet	theBasiX	Part of the Business Transformation Collection, this bubble-chart portlet displays investments per their alignment, status and total planned benefit. The: X-axis displays the alignment Y-axis displays the status Bubble-size displays the total planned benefit
Investment Instance Rights by Resource	EX1322	Portlet	theWorX	This portlet will allow administrators or other managers to see what resources have been granted instance rights to any investment. Filtering is available by resource, investment or right.
Investment Resource Rates	EX1061	Portlet	theWorX	The Investment Resource Rate portlet allows a user to search for effective (or missing) rates for resources across all investment types. It pulls rate information from the matrix extraction tables and includes currency conversion if the environment supports multiple currencies. The portlet can be used both to search for the rate of any given resource and to determine which resources might be missing rates when an error is generated when attempting to populate a cost plan (REVMGR-20728:Rates and Costs are both missing for one or more roles/resources).
IT Financial Management | PPM Relationship	EX1363	Presentation	theBasix	Course description: “How does my financial forecast and budget (project/program/portfolio) relate to the department/cost center budgets that finance prepares? Is there a better way to link the two together? This is a topic many organizations struggle with, and this session will review tools and processes that can help solve this problem.”

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IT-ROI - XOG & Query Bridge	EX0957	Configuration Module	theBasiX	XOG & Query Bridge (XQ) is a 2-in-1 Clarity PPM tool-set that provides enhanced functionality and an improved user experience when retrieving and inserting data to/from Clarity PPM environments. XQ is available as a Web-based application and also as a downloadable desktop version that supports both On-premise and On-demand Clarity PPM implementations. Features and Highlights: * Intuitive and user friendly graphic interface to perform XOG data operations and run SQL queries on Clarity PPM environments. * Ability to run single and bulk XOG requests. * Provides execution history, results and usage statistics. * Web-based and desktop versions available. * Support to execute data requests for both On-demand and On-premise Clarity PPM implementations. * Optional notifications by email that alerts users once their requests have been processed. * XSLT tool included to transform XML documents.
ITFM and PPM | Better Together - RegoU 2018	EX1502	Presentation	theBasiX	Most organizations use Clarity PPM as part of an annual planning process, in conjunction with an ITFM or financial system. There is often a struggle to know where Clarity PPM fits into the process and how to effectively connect the data and processes between these tools. In this class, we will discuss how a PPM tool and an ITFM tool fit together to support annual planning.
Jaspersoft | Ad Hoc Beginner	EX1407	Presentation	theWorX	Course description: “Learn how to take advantage of the ad-hoc reporting capabilities of Jaspersoft, which comes embedded in Clarity PPM 14.2 and later. This class is designed to provide hands on exercises to teach individuals how to utilize the power of this new product. As users begin building their own reports and dashboards, the burden on developers will decrease and Clarity PPM perception and adoption will increase.” Download file is the presentation slide deck.
Jaspersoft | Advanced - RegoU 2016	EX1154	Presentation	theWorX	Already have a base understanding of Jaspersoft Studio development? This hands-on class is the first in a four-part Advanced Jaspersoft Studio training program. • This first session will focus on the common scenario of duplicating and modifying an out of the box, CA provided Jaspersoft Report. • This second session will build upon part one introducing additional advanced concepts around utilizing Multiple Datasets, Sub-reports, and Charting. • The third session will build upon part one and two, introducing additional advanced concepts around Widgets integration and Crosstabs. This hands-on class is the fourth in a four-part Jaspersoft Studio training program. Didn’t get the answers you needed in part one, two, or three? Come prepared to discuss your own Jaspersoft challenges in this open lab, and our technical team will help resolve them.
Jaspersoft | Beginning - RegoU 2016	EX1155	Presentation	theWorX	Replacing Crystal Reports with Jaspersoft? This hands-on class is the first in a four-part Jaspersoft Studio training program. • Session one will focus on everything you need to get started, including Jaspersoft Studio Installation, Data Adapter Setup, Repository Connection, and a walkthrough of the Jaspersoft Studio Interface. • Session two will cover a walkthrough of basic features and introduce report development utilizing the basic report capabilities of Jaspersoft Studio such as Text Fields, Frames, Static Text, Breaks, Lines and Common Page Information Components. • Session three will build upon part two, introducing more advanced concepts such as Grouping/Sorting, Status Indicators, Dynamic Images, and Server Deployment. Session four will build upon part three, introducing more advanced concepts such as Input Controls and Basic Charting.
Jaspersoft | Dashboard	EX1408	Presentation	theWorX	Course description: “Learn how to take advantage of the dashboard reporting capabilities of Jaspersoft, which comes embedded in Clarity PPM 14.2 and later. This class is designed to provide hands on exercises to teach individuals how to utilize the power of this Excelius-like capability. Leveraging the advanced UI features of dashboards, Clarity PPM perception will increase, giving executives the views they want.” Download file is the presentation slide deck.
Jaspersoft 6.2.1 | Upgrades and New Features - regoU Web Series	EX1286	Presentation	theBasiX	Clarity PPM is upgrading to Jaspersoft 6.2.1. Atul Kunkulol is back to show the new features that will be included in this upgrade. He will take us through new chart formats and formatting options. He will also guide us on how to export dashboards and view the new Gantt charts.

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Jaspersoft Ad-Hoc | Beginner - RegoU 2016	EX1156	Presentation	theWorX	Learn how to take advantage of the ad-hoc reporting capabilities of Jaspersoft, which comes embedded in Clarity PPM 14.2 and later. This class is designed to provide hands on exercises to teach individuals how to utilize the power of this new product. As users begin building their own reports and dashboards, the burden on developers will decrease and Clarity PPM perception and adoption will increase.
Jaspersoft Adhoc Reporting | Beginner - RegoU 2018	EX1503	Presentation	theBasiX	Learn how to take advantage of the ad-hoc reporting capabilities of Jaspersoft, which comes embedded in Clarity PPM 14.2 and later. This class is designed to provide hands on exercises to teach individuals how to utilize the power of this new product. As users begin building their own reports and dashboards, the burden on developers will decrease and Clarity PPM perception and adoption will increase.
Jaspersoft Navigation as an Ad Hoc User - RegoU15	EX1023	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on navigating Jaspersoft as an ad hoc user. The agenda covers: navigating the Advanced Reporting Waters, viewing existing reports, creating an ad hoc view, understanding domains, a deeper dive into ad hoc views, creating and using topics, creating an ad hoc report, and dashboards.
Jaspersoft Quick Tips: Dynamic Image - Webinar	EX1229	Presentation	theBasiX	Learn foundational Jaspersoft skills with Rego Quick Tips. Today's topic will cover adding a dynamic image. For further training deep dives, check out the RegoU 2016 course presentations in RegoXchange. To view the webinar, click here – http://event.on24.com/wcc/r/1168846/8FD99BA821513DE76CB3E42F423DD134
Jaspersoft Quick Tips: Markup - Webinar	EX1228	Presentation	theBasiX	Learn foundational Jaspersoft skills with Rego Quick Tips. Today's topic will cover how markup works. For further training deep dives, check out the RegoU 2016 course presentations in RegoXchange. To view the webinar, click here – http://event.on24.com/wcc/r/1170011/751AFE89311394FC732D605EE50E41B3
Jaspersoft Studio | Advanced	EX1409	Presentation	theWorX	Course description: “Already have a base understanding of Jaspersoft Studio development? This session will include advanced topics like: duplicating and modifying an OOTB report, Multiple Datasets, Subreports, Charting, Widgets integration, and Crosstabs.” Download file is the presentation slide deck.
Jaspersoft Studio | Advanced - RegoU 2018	EX1504	Presentation	theBasiX	Already have a base understanding of Jaspersoft Studio development? This session will include advanced topics like: duplicating and modifying an OOTB report, Multiple Datasets, Subreports, Charting, Widgets integration, and Crosstabs. The detailed agenda is as follows: Jaspersoft Advanced – Out of the Box Customization (2 hours) • OOTB Reports, OOTB Domains, Resource Bundles, Security – Access Grant Schemas Jaspersoft Advanced – Chart Development (2 hours) • Explore multiple advanced charting techniques and types, using built-in charting components. Including: Properties (Colors, Plot options, Sizing, Gauges, Etc.), Dual pie chart, Time series, Heat map Jaspersoft Advanced – Scriptlets (2 hours) • Introduction to the basics of Jaspersoft Studio Scriptlet development, utilizing java libraries in custom java classes to perform complex tasks in a simple manner. Jaspersoft Advanced – Roundtable (1 hour) • Crystal capabilities missing in Jaspersoft Studio, Sharing examples, report bursting need, automation needs, working with internal BI groups.
Jaspersoft Studio | Beginner	EX1410	Presentation	theWorX	Learn the basics of creating Jaspersoft studio reports. This session will walk through basic features and introduce report development utilizing the basic report capabilities of Jaspersoft Studio such as Text Fields, Frames, Static Text, Breaks, Lines and Common Page Information Components, Grouping/Sorting, Status Indicators, Dynamic Images, Input Controls, and Basic Charting.
Jaspersoft Studio | Beginner - RegoU 2018	EX1505	Presentation	theBasiX	Learn the basics of creating Jaspersoft studio reports. This session will walk through basic features and introduce report development utilizing the basic report capabilities of Jaspersoft Studio such as Text Fields, Frames, Static Text, Breaks, Lines and Common Page Information Components, Grouping/Sorting, Status Indicators, Dynamic Images, Input Controls, and Basic Charting.
Job Schedule Details	EX0061	Portlet	theWorX	The Job Schedule Details portlet shows all active jobs and displays all of the schedule information for those jobs - including the months, days, hours, and minutes. It also displays the last time the job was updated and whether or not the job was custom or a CA job. The portlet will help the administrator understand the current job schedule configuration.
Know Thyself… At Work - RegoU 2018	EX1506	Presentation	theBasiX	Part presentation, part open discussion, this unique session will focus on offering philosophies and practical tips around increasing the wisdom we have about ourselves as we navigate our corporate lives. Using conscious leadership principles as a guide, we will cover topics such as empathy in the workplace, understanding and working through our internal drama, and the benefits of meditation and silence.

Name	ID	Work Type	Location	Long Description
KPI's for Managing your PMO's	EX1596	Presentation	theBasiX	You know that a well-run PMO can deliver huge benefits to an organization. But does your CIO? Or CEO? A Gartner study found that many CEOs are skeptical of the PMO office being little more than IT overhead. So it's no surprise that close to half of PMOs fail within 2-3 years. While PMOs excel at tracking all kinds of metrics, they often don't do a very good job of measuring their own key performance indicators (KPIs). In fact, very few PMOs have KPIs that reflect the results, successes, and value that their office brings to the organization. But it's a must—if you want your PMO to stay viable. Join Rego's Rob Greca, Senior Engagement Manager and Managing Director of Agile Services, with other panel members as they discuss how to create smart KPIs for Your PMO.
LabCorp Launched Rego's Action Item Responder - Webinar	EX1580	Presentation	theBasiX	Before Rego's Action Item Responder (AIR), everyone had to log into Clarity PPM to reply to action items. Now users can approve and reject everything from email: - timesheets, - change requests, - budget plans, - idea to project conversions, - and more. Join Paul Soper, LabCorp's IT Project Management Director, and Rob Greca, Rego's Agile and PPM Specialist, to hear about how Rego's AIR (Action Item Responder) stole the show for stakeholders and managers.
Last Logged In	EX0062	Portlet	theWorX	The Last Logged In portlet provides the administrator with an overview of all users within the system and the last time he or she logged into Clarity PPM. Using this portlet, administrators can quickly cleanup any inactive users or provide a list of users to managers that are not logging into the system. The portlet provides several pieces of information related to the resource as well as a "Days Since Last Login" with a status indicator. The administrator may filter on resource/id, OBS, user status, resource manager, or last logged in date to narrow down the results.
Late Issues	EX0063	Portlet	theWorX	The Late Issues portlet displays all issues related to active projects that the logged in user has view rights to. The issues displayed are those that are past their target resolution date but not Closed or Resolved. The portlet provides a Project Manager the ability to view and track issues across multiple projects without going into each project individually. This portlet displays the issue, the associated project name and project manager, as well as the issue owner, target resolution date, status, and priority of the issue, along with the total number of days the issue has been open. The user has the ability to filter by several criteria in order to narrow down the late issues.
Late Issues - Power BI	EX1552	Report	theWorX	Late Issues report provides the Project Managers a single place to view all the Open Issues that are past their target resolution date. This report provides information such as Issue Count, Issues by OBS Level 2, Priority, Status and Target Resolution Date in Stacked Column Chart. In addition, this report has also Table view of Issue information such as Investment Name, Issue Name, Investment Manager, Issue ID, Owner, Target Resolution Date, Status and Priority. User can further narrow their search by OBS Type & Path and Target Resolution Date.
Late Issues (JS Report)	EX1461	Report	theWorX	Late Issues report provides the Project Managers a single place to view all the Open Issues that are past their target resolution date for multiple projects. User can view only the projects that he has access to. This report provides Issue information such as ID, Name, Owner, Status, Priority, Target Resolution Date, Days Open (# of days Issue is open) and its associated Project ID, Project Name & Project Manager. User can further narrow their search by OBS Type & Path, Issue ID, Issue Name, Project ID, Project Manager, Is Project Active?, Issue Owner, Issue Target Resolution Date, Issue Priority and No of Days Issue is Open.
Late Milestones	EX0064	Portlet	theWorX	The Late Milestones portlet displays all action items related to active projects that the logged in user has view rights to. The milestones displayed are those that are not closed but are past their finish date or past their baseline finish date. The portlet provides a Project Manager the ability to view and track action items across multiple projects without going into each project individually. This portlet provides a single consolidated view of late milestones based on the current project baseline, and the age of the milestone. The portlet will display the Project ID, Project Name, Project Manager, Milestone Name, Due Date, Baseline Date, Days Late (calculated from baseline dates), and Days Old (calculated from today's date).

Name	ID	Work Type	Location	Long Description
Late Milestones (JS Report)	EX1465	Report	theWorX	Late Milestones report displays the list of all milestones that are not closed but are past their finish date or past their baseline finish date. The report provides Project Manager the ability to view and track late milestones across multiple projects without going into each project individually. This report displays Project ID, Project Name, Project Manager, Milestone Name, Due Date, Baseline Date, Days Late (Elapsed days between Task Finish date and Task Baseline Finish date), and Days Old (Elapsed days between Task Finish Date and Today's Date). User can further narrow their search by Project ID, Project Name, Project Manager Name, Milestone Name, Due Date between, Baseline Date between, Is Milestone?, Is late?, Task Status, Is Template?. User can use exact dates or relative dates for Due Date between and Baseline Date between filter parameters.
Late Project Action Items	EX0065	Portlet	theWorX	The Late Project Action Items portlet displays all action items related to active projects that the logged in user has view rights to. The action items displayed are those that are past their due date with a status of "In Progress" or "Open". The portlet provides a Project Manager the ability to view and track action items across multiple projects without going into each project individually. In a single consolidated list, all late project action items can be easily viewed, along with the project with which they are associated, the individual assigned, and the owner of the action item.
Late Risks	EX0066	Portlet	theWorX	The Late Risks portlet displays all risks related to active projects that the logged in user has view rights to. The risks displayed are those that are past their target resolution date but not Closed or Resolved. The portlet provides a Project Manager the ability to view and track Risks across multiple projects without going into each project individually. This portlet displays the risk, the associated project name and project manager, as well as the risk owner, target resolution date, status, priority of the risk, and the total number of days the risk has been open.
Late Risks - Power BI	EX1553	Report	theWorX	Late Risk report provides the Project Managers a single place to view all the Open Risks that are past their target resolution date. This report provides information such as Risk Count, Risks by OBS Level 2, Priority, Status and Year in Stacked Column Chart. In addition, this report has also Table view of Risk information such as Investment Name, Risk Name, Investment Manager, Risk ID, Owner, Target Resolution Date, Status, Priority and Days Open. User can further narrow their search by OBS Type & Path and Target Resolution Date.
Late Risks (JS Report)	EX1462	Report	theWorX	Late Risks report provides the project manager a single place to view risks across multiple projects. This report displays Project Information such as ID, Name & Manager, Risk Information such as its ID, Name, Owner, Status, Probability, Impact, Target Resolution Date & Days Open. You can further narrow your search by Risk Status, Risk Name Risk Impact, Risk Owner, Project Name and Project Manager.
Late Tasks	EX0067	Portlet	theWorX	The Late Tasks portlet provides a Project Manager the ability to view and track tasks across multiple projects with due dates in the past. This portlet provides a single consolidated view of late tasks, their task start and finish date, and ETCs remaining for the task. Also displayed is the number of days that the Task Finish Date is different from the current baseline finish date (Days Late) as well as the number of days that have passed beyond the task finish date and the current date (Days Old). The user will see all tasks associated with the projects to which they have access.
Late Tasks - Power BI	EX1554	Report	theWorX	Late Tasks report provides the Project Managers a single place to view all the Tasks that are past their baseline finish date. This report provides information such as Investment ID, Investment Name, Investment Manager, Task Name, Start Date, Finish Date, ETC Hours, Days Old and Days Late in Table view. User can further narrow their search by OBS Type & Path, Investment Manager, Investment Name and whether the Task is a Milestone or not.
Late Tasks with Assignments (JS Report)	EX1433	Report	theWorX	Late Tasks with Assignments report displays the list of all Tasks (with their Total ETC Hours) that are not closed but are past their finish date or past their baseline finish date. The report provides Project Manager the ability to view and track late tasks across multiple projects without going into each project individually. This report displays Project Name, Project Manager, Task Name, Task Status, Task Start Date, Task Finish Date, Days Old (Elapsed days between Task Finish Date and Today's Date), Days Late (Elapsed days between Task Finish date and Task Baseline Finish date). User can further narrow their search by Task Name, Task Status, Project ID, Project Name, Project Manager, Is Milestone?, Is late?, Task Start Date, Task Finish Date and Is Template?. User can use exact dates or relative dates for Task Start Date and Task Finish Date filter parameters.
Latest Clarity PPM Release | Functional Review - RegoU 2016	EX1157	Presentation	theBasiX	Have you seen the latest Clarity PPM releases or examined their new features and functions? In this session we will give a demo of the various new functions in versions 14.2 and above. This includes: APM content, Migration tool, JasperSoft, New UI, aggregation field of subobject, etc.

Name	ID	Work Type	Location	Long Description
Leading Change and Delivering Value	EX1364	Presentation	theBasix	Course description: “With every new PPM process, the organization must adopt change. Change is constant in an organization. This session will talk about keys to successfully leading change vs. just implementing change in your organization.” Download file is the slide deck used for the presentation.
Lean Agile - Use Case Discussion - Webinar	EX1590	Presentation	theBasiX	Attracted to the lean Agile mindset but feeling stuck? We’ve worked with many PMOs who were concerned about getting to market faster but felt limited by tools and process. Some organizations started taking a lean approach with home-grown methods. Some started with SAFe. We helped them move fully into the solution. Join ICON, Rego, and CA Agile Central to see real use cases on how to fund your goals, adapt quickly, better support your project sponsors and delivery leads, and increase your outcomes 20-30% by shifting the way you budget.
Lessons Learned - Add-on Module	EX1118	Configuration & App	theWorX	The Rego Lessons Learned module is designed as a Project Sub-Object used to capture lessons learned during execution and closure of a project. Contents include ID, Name, Type, Detailed Description, Action Strategy, Attachments, Submitter, and Submitted Date. Lessons Learned Types include Business Process/Documentation/Standards, Education/Training, Management Involvement, Project Schedule/Resource Availability, Team Dynamics/Collaboration, Testing, and Tool Configurations/Reports. An enterprise-wide portlet is also included in the package, which additionally adds Project Name and ID fields. Portlet is filterable by Project, Lessons Learned Type, and Lessons Learned Name (text search). The Rego Project Closure Survey has multiple components. The survey initiator (PM) selects Survey Name, Survey Participants, and Survey Due Date on the Survey Initiation subpage. Participants may be selected from project team and interested parties outside the team. Then there is a process that creates individual survey records for these participants on a separate Project Closure Survey object (this process is triggered by setting a Boolean to yes). Values transferred during this process are Project Name, Project ID, Survey Name, Participant Name, and Survey Due Date. Rights are granted in such a way (Create only) that the participant can see only his/her survey instance. There are 13 survey questions with response values of Strongly Agree (5), Agree (4), No Opinion (3), Disagree (2), and Strongly Disagree (1). When done, the participant submits his/her survey by selecting a Completion Boolean (a process checks that all questions are answered, and then locks the survey instance). The project manager and other interested parties are able to view the summarized survey results in a portlet, which maintains the confidentiality of individual surveys. Note that the Survey Names lookup is not currently used. It is being included for future expansion.
Lessons Learned | Best Practices	EX1365	Presentation	theBasix	Course description: “Have you ever thought about tracking customer feedback as part of your project closure? This class will show how lessons learned can be entered and tracked within Clarity PPM.” Download file is the slide deck used for the presentation.
Lessons Learned | Best Practices - RegoU 2016	EX1158	Presentation	theBasiX	Have you ever thought about tracking customer feedback as part of your project closure? This class will show how lessons learned can be entered and tracked within Clarity PPM.
Lessons Learned | Best Practices - RegoU 2018	EX1507	Presentation	theBasiX	Have you ever thought about tracking customer feedback as part of your project closure? This class will show how lessons learned can be entered and tracked within Clarity PPM.
Let Us Introduce You to 15.1 - regoU Webinar Series	EX1287	Presentation	theBasiX	Be among the first to see the new User Interface in this Clarity PPM 15.1 demo. We’ll show you around and review the functionality, including a new project list page, drag and drop tasks, and the built-in Project Status Report.
Leveraging Org Change Management for PPM Process Implementations - RegoU15	EX1030	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on making improvements to internal PPM Process in a time of Organizational Change. The agenda covers what is PPM Process, challenges faced in implementation, how can Org Change facilitate effective PPM implementation.
Leveraging User Personas for Supporting Clarity PPM	EX1366	Presentation	theBasix	Course description: “It’s easy to focus on the “cool” new features of the latest release and overlook the impact on specific End Users, and how they actually use new features and modules. Focusing on what Users need and want may not be easy, but it will lead to greater engagement, strong adoption and increase value of Clarity PPM. Join Empowered Networks for this session to discuss how to leverage User Personas in configuring Clarity PPM.”
License Counts by OBS	EX0145	Portlet	theWorX	The License Count by OBS portlet displays license type information by a selected OBS for active users. The portlet is used to determine what kind of license a specific user has and the OBS in which he or she resides. It can be helpful for determining specific amount of licenses used by different departments within the organization.

Name	ID	Work Type	Location	Long Description
Linking to Individual Timesheets from a Custom Portlet	EX1213	Technical Trick	theWorX	Instructions around linking to Individual Timesheets from a Custom Portlet. Summary of steps: • Query NSQL must contain following 3 fields in SELECT list. o Timesheet Internal ID o Resource Internal ID o Timeperiod Internal ID • Build Portlet without the link • XOG out portlet with its query • Paste custom code into XOGd out .xml. • XOG back in. The link is now established. • Caution: If you plan to migrate this portlet from one environment to another, the timesheet link is not included in the XOG output .xml file. So the code must be added back in each time.
Lock Inactive Users	EX0992	Workflow Job	theWorX	The Lock Inactive Users workflow process will automatically lock all user accounts when their last login date was more than 60 days ago. The process can be scheduled to run daily or can be run on demand when resource account cleanup is needed.
Locked Projects	EX0068	Portlet	theBasiX	The Locked Projects portlet displays all of the projects in the system that are currently in a 'locked' state. The user may view the project ID, Project Name, Project Manager, the user who locked the project, and the date the project was locked. Administrators may utilize the data in this portlet in order to determine if a manual unlock should be executed on a project that has been locked for an extended period of time. Extended locks may indicate the individual has forgotten that he or she had obtained the lock. The portlet includes a hyperlink on the Project Name field, which will allow the administrator to more easily access and unlock the project.
Locked Resources	EX0069	Portlet	theWorX	The Locked Resources portlet displays all resources that are locked within Clarity PPM. It also displays the resource manager and last updated date for the user. The portlet can be filtered on resource manager and last updated date range. This portlet can be used by an administrator to determine which resources are locked by the system.
Manage Risk Categories	EX0070	Technical Trick	theWorX	The Manage Risk Categories document provides the steps needed to modify the current system-defined list of values for the Risk categories.
Manager License Count by OBS	EX0919	Portlet	theWorX	This portlet allows you to view the resources that are consuming manager license counts as well as allowing you to filter by resource OBS. This portlet also displays the last date that the resource logged into the tool so that we can see if the resource hasn't logged in for months.
Managing Access to the Project QRC	EX1261	Training Document	theBasiX	A Quick Reference Card to assist in managing access to the Project. Use the Access to This Project pages to view, grant, and edit the instance-level access rights to your project. You can view access rights on the full view page. You can also edit and grant access rights on the resource, group, and OBS unit pages.
Managing Baselines	EX1415	Training Video	theBasiX	This video provides an overview of project baselines and their purpose. It covers how to create both project and task baselines, as well as creating baselines within the Gantt.
Managing Data Models - RegoU15	EX1024	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on managing data models in Clarity PPM. The agenda covers the New Data Warehouse, Data Warehouse vs Datamart & Slices.
Managing Detailed Benefit Plans	EX1416	Training Video	theBasiX	This video provides detailed instructions on creating benefit plans and how to associate benefit plans to cost and budget plans.
Managing Detailed Budget Plans	EX1417	Training Video	theBasiX	This video covers submitting cost plans as budget plans using the plan of record, and approving and rejecting budget plans. It also shows how to compare planned and budget plans.
Managing Detailed Cost Plans	EX1418	Training Video	theBasiX	This video provides detailed instruction on how to either manually create or automatically populate cost plans. It also covers copying cost plans and setting the plan of record.
Managing Resource Allocations QRC	EX1271	Training Document	theBasiX	A Quick Reference Card to assist in managing resource allocations.
Maturing Portfolio Planning | What to Aspire to - RegoU 2018	EX1508	Presentation	theBasiX	How do I mature my portfolio planning? What is my organization's next steps in maturing our portfolio planning processes, and how can Clarity PPM or other tools help? This class will review industry trends related to portfolio planning and talk about what each organization should aspire to portfolio processes.
Maximizing Portlet Function to Personalize Output: RegoU February 2014	EX0871	Presentation	theBasiX	RegoU Presentation from February 2014. Portlets are powerful tools to display real-time data, as well as provide users the ability to personalize the output. However, most portlets that are written are simple graphs or grids. In this session, Rego's team will take your knowledge of portlets to the next level by teaching you how to create portlets that provide drill-down capability, as well as hierarchical structure. As a team, we will explore some of the more advanced Clarity PPM database tables and information found in complex queries.

Name	ID	Work Type	Location	Long Description
Maximizing Your Training Strategy - RegoU15	EX1037	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on making the most of your training opportunities. The agenda covers training and change management recommendations, Learning, Teaching, Training Options, CAPA and Tools & Materials.
Maximizing Your Training Strategy: RegoU February 2014	EX0872	Presentation	theBasiX	RegoU Presentation from February 2014. Training is critical to end-user adoption. With all the choices—CAPA, videos, instructor-led, handbooks, etc.—how do you develop a training strategy that works? In this session, you will learn how to develop an overall training strategy that can accommodate new users as updated functionality is deployed. After the session, you will be able to identify the pros and cons of various training methods and venues. Rego's Clarity PPM experts will provide basic training on the use of CA Productivity Accelerator (CAPA) and compare that with inexpensive tools such as Camtasia.
Meisterplan | Presented by Citrix & itdesign - regoU Webinar	EX1294	Presentation	theBasiX	Join Scott McLaughlin from Citrix and Stephan Anders from itdesign as they discuss Meisterplan. Meisterplan is the Clarity PPM portfolio add-on from itdesign for prioritizing, selecting, and governing Portfolios based on strong metrics. See a live demo and hear how Citrix has used Meisterplan to overcome challenges and streamline work processes. Click the download button to obtain a .pdf file of the presentation deck.
Menus Toolbars Icons QRC	EX1237	Training - Doc	theBasiX	A Quick Reference Card for new users that covers Menus, Toolbars, Icons and Buttons.
Metrics | Positive and Negative Impacts - RegoU 2016	EX1159	Presentation	theBasiX	Have you ever experienced the downside of metrics? This class is a working session that review different types of metrics and the problems they uncover as well as the problems they can cause. Learn how to balance your positive and negative metric impacts.
Metrics | Rego and OOTB CA Metrics - RegoU 2016	EX1160	Presentation	theBasiX	Looking for metrics that you can implement immediately in Clarity PPM? This class will be a working session to review all of the content available out of the box and within the CA and Rego content packs. This will provide you the options for metrics the represent industry best practice without the costs to develop them.
Metrics and Dashboards | Best Practices - RegoU 2016	EX1161	Presentation	theBasiX	Do you want to amaze your stakeholders with metrics and dashboards? This class will review how to create and implement balanced metrics to motivate and inform your teams. See examples of best practice metrics, and learn how organizations have used them to drive optimal performance.
Metrics That Matter - RegoU 2015	EX1016	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on utilizing Metrics to measure effective Clarity PPM usage. The agenda starts with an overview of metrics and then three surveys were used to direct the class discussion. The presentation ends with final thoughts on what metrics are.
Microsoft Project - Open Workbench Comparison	EX0600	Presentation	theBasiX	A PowerPoint presentation reviewing the differences between using MSP and OWB as an external scheduling too. Benefits and drawbacks of each tool are addressed, along with criteria for making a decision on which to go with.
Microsoft Project Errors and Issues	EX0594	Training - Doc	theWorX	A document detailing some common MSP Errors and Issues, and suggestions for how to address them.
Milestone Task Dependency	EX1304	Portlet	theWorX	The Milestone Task Dependency portlet shows the milestone task dependency count and has a drilldown to the details. The portlet looks at the dependency impact on milestones, and is not limited to just dependencies that are on different projects. The lag days calculation is based off of the maximum dependency impact and the drilldown portlet (Milestone Task Dependency Details :::: rego_milestone_dependency_det)shows the details for each.
Missing Time by OBS	EX0071	Portlet	theBasiX	The Missing Time by OBS portlet displays all missing or late timesheets for resources staffed within a certain OBS. Resources will be listed if they are open for time entry, have a track mode of Clarity PPM, and have timesheet that is not posted (accommodates for hire and termination dates). The portlet also only shows resources that the logged in user has security rights to view. Administrators and the Project Management Office may use this portlet to determine the timesheet status of all resources in open time periods within a specific OBS. Many times a user will need to see all the timesheets under an area. This portlet allows a user to quickly search by OBS and view all timesheets under that OBS. After you select the OBS, you may select the period start in the filter. The portlet will display an indicator based on timesheet status, the status, period start, resource name, resource manager, and actual hours for the timesheet.
Missing Time by OBS - Power BI	EX1555	Report	theWorX	Missing Time by OBS report displays Resource whose timesheets are missed. There is Clustered Column Chart which displays Timesheets count by Resource. Also, there is table view of Resource, Resource Manager, Time Period Start and Finish Dates, Total Hours and Timesheet status. User can narrow their search by OBS Type & Path and Project Manager, Resource Manager, Resource, Timesheet Status and Time Period Start Date (Relative or Specific Date Range).

Name	ID	Work Type	Location	Long Description
Missing Time by PM	EX0146	Portlet	theBasiX	The Missing Time by PM portlet displays all missing or late timesheets for resources staffed on a project where the logged in user is the project manager. Resources will be listed if they are open for time entry, have a track mode of Clarity PPM, and have timesheet that is not posted (accommodates for hire and termination dates). Project managers may use this portlet to determine the timesheet status of resources staffed on their projects. You may narrow the results by filtering by resource manager, period start, resource name, or status. The portlet will display an indicator based on timesheet status, the status, period start, resource name, and actual hours for the timesheet.
Missing Time by PM - Power BI	EX1556	Report	theWorX	Missing Time by PM report displays Resources whose timesheets are missed by Project Manager. There is Clustered Column Chart which displays missed timesheets count by Project Manager. Also, there is table view of Project Manager, Resource, Time Period Start and Finish Dates, Total Hours and Timesheet status. User can narrow their search by OBS Type & Path and Project Manager, Resource Manager, Resource, Timesheet Status and Time Period Start Date (Relative or Specific Date Range).
Missing Time by RM	EX0147	Portlet	theBasiX	The Missing Time by RM portlet displays all missing or late timesheets for resources for which the logged in user has resources (logged in user is the RM). Resources will be listed if they are open for time entry, have a track mode of Clarity PPM, and have timesheet that is not posted (accommodates for hire and termination dates). Resource managers may use this portlet to determine the timesheet status of all resources in open time periods. The portlet will display an indicator based on timesheet status, the status, period start, resource name, and actual hours for the timesheet.
Missing Time by RM - Power BI	EX1557	Report	theWorX	Missing Time by RM report displays Resources whose timesheets are missed by Resource Manager. There is Clustered Column Chart which displays missed timesheets count by Resource Manager. Also, there is table view of Resource Manager, Resource, Time Period Start and Finish Dates, Total Hours and Timesheet status. User can narrow their search by OBS Type & Path, Resource Manager, Resource, Timesheet Status and Time Period Start Date (Relative or Specific Date Range).
Mobile Time Approval QRC	EX1276	Training Document	theBasiX	A Quick Reference Card to assist in the use of the mobile app to approve timesheets in Clarity PPM.
Mobile Time Entry QRC	EX1277	Training Document	theBasiX	A Quick Reference Card to assist in the use of the mobile app to enter time into Clarity PPM.
Mobile Tme Manager - Quick Reference Guide	EX0915	Training - Doc	theBasiX	Managing timesheets is easy with the Clarity PPM Mobile Time Manager. This quick reference guide will assist you in using the app. Right from your smart phone you can submit, approve, and view the status of timesheets including color-coded metrics. As a manager, you can view and approve submitted timesheets from your staff or return for changes.
Modern UX Innovation - Webinar	Ex1632	Presentation	theBasiX	Two new tools to simplify your life. Rego has two cutting-edge tools for the Modern UX. Rego Channel Pack Harness the power of the traditional Classic UI in the Modern UX. With the Rego Channel Pack, you can access your project-specific tabs from the Classic UI in the Modern UX—without having to leave the Modern UX. This makes pages that weren’t previously available to you easily accessible from one location. You can even do full administration work, all within the Modern UX. Rego Roadmap Printer If you’ve always wanted to print your PPM Roadmap and share it for all to see, now you can with Rego Roadmap Printer. This easy-to-use Google Chrome plugin generates a PDF for easy printing.
Monthly Actuals - User View - JS Report	EX1647	Report	theWorX	Monthly Actuals - User View is a standard calendar view of actuals posted by logged in user on each day of the selected month. Actuals also includes timesheets that haven’t been submitted/posted yet. Actual hours on the report are tied to user's availability i.e. when user has 0 availability (Saturday/Sunday/Holiday) then actuals are greyed out.
Move from Charge Code to Cost Type	EX1318	Technical Trick	theWorX	The Cost Type field was introduced in Clarity PPM 13.3, but had some limitations because it wasn’t available in certain financial areas. The Clarity PPM 14.3 release includes the addition of Cost Type in the Cost/Rate Matrix, Chargebacks, Transactions and WIP Adjustments. This Technical Trick assists you in moving from Charge Code to Cost Type.

Name	ID	Work Type	Location	Long Description
Move Role to Team/Assignment	EX0148	Workflow Job	theWorX	The Move Role to Team/Assignment process takes the role from the resource object and pushes that information into the team and assignment objects when the role isn't NULL on the team and assignment objects. This happens normally, assuming a resource has their primary role populated. This process is needed if a resource or set of resources were added to projects without having their primary role filled in.
Moving to Clarity PPM (Clarity) to SaaS - Webinar	EX1581	Presentation	theBasiX	What does Software as a Service (SaaS) look like? Most new companies start with SaaS hosting, and many On Premise companies make the switch. They like to outsource their infrastructure and upgrade easily. On the other hand, accessing a common, central system means Clarity PPM can't be customized. Join Rego's Josh Leone and Bob Schwartz to talk pros, cons, migration, and a slew of other SaaS topics.
MS Project with Clarity PPM | Tips and Tricks	EX1367	Presentation	theBasiX	Course description: "Struggling to use MS Project with Clarity PPM or investigating its potential? Learn how to effectively use MS Project with Clarity PPM in this training, which includes overviews of key settings, shortcuts, out-of-the box field mapping, and custom field mapping." Download file is the slide deck used for the presentation.
MSP | Installation Tips & Tricks - RegoU 2018	EX1509	Presentation	theBasiX	Struggling to use MS Project with Clarity PPM or investigating its potential? Learn how to effectively install and setup MS Project to connect with Clarity PPM in this training, which includes help with the basic installation and setup on participant machines. We will also give an overview of key settings and out-of-the box field mapping.
MSP | Ongoing Use Tips & Tricks - RegoU 2018	EX1510	Presentation	theBasiX	Struggling to use MS Project with Clarity PPM or investigating its potential? Learn how to effectively use MS Project with Clarity PPM in this training, which includes overviews of shortcuts, troubleshooting interface issues, best practice learnings, and how to maximize custom field mapping.
MSP with Clarity PPM | Tips and Tricks - RegoU 2016	EX1162	Presentation	theBasiX	Struggling to use MS Project with Clarity PPM or investigating its potential? Learn how to effectively use MS Project with Clarity PPM in this training, which includes overviews of key settings, shortcuts, out of the box field mapping, and custom field mapping.
Multi-Value Filter in Query-Based Portlet	EX0072	Technical Trick	theBasiX	The Multi-Value Filter in Query-Based technical trick document provides an overview of how to create a multi-value lookup in a portlet filter, where the field is a parameter within the query. If the query imbeds the parameter normally, the portlet will only be able to have a single selection of that parameter. This technical solution will enable you to make these parameters multi-selects.
My Action Items	EX0149	Portlet	theBasiX	The My Action Items portlet displays all action items that are assigned or created by the logged in user. This portlet contains action item data including due date and a health stoplight to indicate when action items are late.
My Allocations	EX0073	Portlet	theWorX	The My Allocations portlet will display the allocations for the logged in user - pulling data from the timeslices. It is used as a quick reference for the users to view their allocations across all of the projects where their allocation is greater than 0 for the specified date range the user wants. This will display both active and inactive projects.
My Assignments	EX0074	Portlet	theWorX	The My Assignments portlet will display the allocations for the logged in user - pulling data from the timeslices. It is used as a quick reference for the users to view their allocations across all of the projects. The portlet also displays work posted against the task, expressed in Actuals, and remaining work to be done, expressed as an Estimate to Complete (ETC). The Effort Variance reflects what the ETC variance is compared to the last current baseline of the project.
My Documents on Projects	EX0253	Portlet	theWorX	The My Documents on Projects portlet displays all of the documents the user has uploaded to projects. This portlet provides the user a single place to view documents across multiple projects without having to go into each project individually. This is efficient and time saving for the user. The filter allows the user to narrow their search by Project, File Name, Active Projects and Description. You may also narrow the view to display documents with a created date within a certain date range. Note: In v13, clicking the file name will link to the collaboration tab where the document resides.

Name	ID	Work Type	Location	Long Description
My Issues	EX0075	Portlet	theBasiX	The My Issues portlet displays all issues within active project that the logged in user is assigned to. The portlet provides the logged in user a single place to view issues across multiple projects without having to go into each project individually. The filter then allows the user to narrow their search by Issue ID, Issue Name, Project ID, Project Name, and Issue Status. You may also narrow the view to display issues with a target resolution date within a certain date range.
My Missing Time	EX0076	Portlet	theBasiX	The My Missing Time portlet displays all open time periods for which the logged in user (assuming they are open for time entry with a track mode of Clarity PPM) has a timesheet that is not posted (accommodates for hire and termination dates). The portlet is used as a quick reference for users to view their missing time.
My Resource Count by Project	EX0248	Portlet	theWorX	The My Resource Count by Project portlet displays project information, total team count and the current user's resource count assigned to the each project. The user may narrow the results by filtering on project name, manager, status, team count, managed resource count or percentage managed resource count. Using this portlet, resource managers are able to quickly identify which projects their resources are allocated to without having to navigate to each resource individually. Not only does this portlet display the overall team count on the project (team count), but it also displays the managed resource count (logged in user's amount of resources allocated to the project) as well as the percentage of managed resource count to team count.
My Resource Vacation	EX0259	Portlet	theWorX	The My Resource Vacation portlet allows a resource to view the current logged in users' annual vacation allowance, as set by the resource manager, against the resource vacation calendar hours and actual posted timesheet hours. The portlet is useful for determining the amount of hours a resource has requested off and has remaining. The portlet also ensures the resource has accounted for all annual vacation allowance hours in the calendar and has posted time for all past calendar request hours.
My Resource Vacation Details	EX0078	Portlet	theWorX	The My Resource Vacation Details portlet returns the logged in users calendar at a glance by week or month for a selected time period. It shows the Resource Name, Resource Manager, Calendar, H (holiday), and V (vacation) hours for the select time frame.
My Resources' Time by Quarter and Type	EX0079	Portlet	theWorX	The My Resources' Time by Quarter and Type portlet displays all subordinate resources' time by type for each quarter. The portlet is able to display either actuals or estimates for each resource. This portlet allows the resource manager to see how each of his or her resources' time is utilized by project type. The user may filter on a specific date range (quarter) and resource OBS.
My Risks	EX0080	Portlet	theBasiX	The My Risks portlet displays all risks related to active projects that the logged in user has been assigned as the owner. The portlet provides the logged in user a single place to view risks across multiple projects without having to go into each project individually. The filter then allows the user to narrow their search by Risk ID, Risk Name, Project ID, Project Name, and Risk Status. You may also narrow the view to display issues with a target resolution date or impact date within a certain date range.
My Time	EX0081	Portlet	theBasiX	The My Time portlet provides the logged in user with the ability to view his or her time by project by time period without having to go into each period individually on the Timesheets page. This portlet uses the actual timeslices to retrieve data. It displays the amount of time worked per week, month or quarter on projects. The user may specify the dates, time-scaled value and the project name.
New Clarity PPM Releases | Value Overview: Is it time for the New UX? - RegoU 2018	EX1511	Presentation	theBasiX	Are you on an older version of Clarity PPM? Do you want to understand the value of the new features and functions in recent versions? Have you seen the new UX and do you wonder when is the right time to move over? This class is a demonstration of the new UX, new features in both classic and new UX, and the value of these features for customers.
New Product Development Use Cases	EX1368	Presentation	theBasix	Course description: "Are you an NPD Clarity PPM user? This session is dedicated to NPD users to discuss some of the unique requirements and configurations needed to support project management for new product development." Download file is the slide deck used for the presentation.
New RESTful APIs | Overview - RegoU 2016	EX1163	Presentation	theBasiX	CA has advertised the addition of RESTful APIs into the core product in version 14.3. What does this mean to you? What does this do to help you support Clarity PPM? This class will review the new APIs and discuss what they enable for you.
Non-IT Use Cases for Clarity PPM | Community Sharing - RegoU 2018	EX1512	Presentation	theBasiX	IT is the most common PPM use case, but we are seeing more and more non-IT groups embrace Clarity PPM. This class will go through the most common PPM use cases outside of IT - Engineering, NPD, PSA, Audit, Marketing, etc.

Name	ID	Work Type	Location	Long Description
NSQL Portlets	EX1369	Presentation	theBasix	Course description: “Do you have basic data model skills and the desire to make great portlets? This class will teach you how to build graphical portlets, grid portlets with summarized data, and tap into timescaled data with two-dimensional portlets.” Download file is the slide deck used for the presentation.
NSQL Portlets | Advanced - RegoU 2018	EX1513	Presentation	theBasiX	Are you ready to build some advanced portlets? This class will teach you how to build very complex portlets, for example tapping into time-scaled data to create a two-dimensional portlet. You will also learn how to build a hierarchical list where data is displayed in expandable levels to show parent/child relationships.
NSQL Portlets | Beginner to Intermediate - RegoU 2016	EX1175	Presentation	theBasiX	Do you have basic data model skills and the desire to make great portlets? This class will teach you how to build graphical portlets, grid portlets with summarized data, and tap into timescaled data with two-dimensional portlets.
NSQL Portlets | Intermediate - RegoU 2018	EX1514	Presentation	theBasiX	Do you have basic NSQL and grid portlet knowledge along with the desire to step it up another level? This class will teach you how to create a simple chart portlet and then walk you through the steps required to build the more complex drilldown portlet.
OBS Utilization	EX0977	Portlet	theWorX	This view depicts the Resource Utilization by comparing actual hours booked as a percentage of total resource availability grouped and totaled by OBS Unit in a hierarchical fashion. Resource availability is determined by the working days and daily availability on the individual Resource Calendar and is depicted on a Monthly basis. This portlet uses Monthly Times and the Time Slice job may need to run before the end user will see results in the portlet. The portlet filters for Project Activity, Resource Open for Time, Resource Activity, and Employment time have been added to OBS Type and the Start and Finish dates.
OBS Utilization with Resource Detail	EX1116	Portlet	theWorX	This portlet depicts the Resource Utilization by comparing actual hours booked as a percentage of total resource availability grouped and totaled by OBS Unit in a hierarchical fashion. Resource availability is determined by the working days and daily availability on the individual Resource Calendar and is depicted on a Monthly basis. This portlet uses Monthly Times and the Time Slice job may need to run before the end user will see results in the portlet. The portlet filters for Project Activity, Resource Open for Time, Resource Activity, and Employment time have been added to OBS Type and the Start and Finish dates. The OBS summary totals show on a single line, but can be clicked (+) to roll out the details behind each OBS total.
Obtaining Repository Connection Information - Jaspersoft Dev	EX1681	Technical Trick	theWorX	In order for Jaspersoft Studio to interact with your Clarity instance, Jaspersoft Studio needs information to connect to your Clarity instance’s Jaspersoft repository. This Tech Trick provides Instructions on how to get this information from within your Clarity Admin menu.
Ongoing Training / Mentoring | Best Practices	EX1370	Presentation	theBasix	Course description: “Do you struggle with how to implement a perpetual education program that continues to add value within the organization? This session will discuss best practices in the creation and structure of an ongoing training/mentoring approach that assist with Clarity PPM adoption.” Download file is the slide deck used for the presentation.
Ongoing Training / Mentoring | Best Practices – RegoU 2018	EX1515	Presentation	theBasiX	Do you struggle with how to implement a perpetual education program that continues to add value within the organization? This session will discuss best practices in the creation and structure of an ongoing training/mentoring approach that assist with Clarity PPM adoption.
OOTB | When, Why, & How to Stay Out-of-the-Box	EX1371	Presentation	theBasix	Course description: “Did you stray from OOTB? Was that the right decision? This will be a discussion on pros and cons of sticking to Clarity PPMs stock attributes, views, and general capabilities. When does it make sense to avoid custom configuration? Conversely, when does it make sense to move beyond the standard OOTB setup?” Download file is the slide deck used for the presentation.
OOTB Portlet Reference Guide v13.3	EX0988	Training - Doc	theBasiX	A document that displays and describes the Out of the Box portlets available through v13.3. Document takes the verbiage from CA’s reference guide and adds images to it, for a more complete view of the available portlet content.
Open and Close Periods	EX0082	Workflow Job	theBasiX	The Open and Close Periods process closes the earliest open time period and opens the first closed time period after the latest open time period. This process may be used for a non-administrator to open and close time periods without having access to the administrative side. The process is executed through the job Execute Process. For example, our oldest time period is January 6, and our most recent is May 1, it would close out January 6, and open a time period for the week after May 1.
Open Workbench | Effective Use - RegoU 2016	EX1164	Presentation	theBasiX	Do you have basic data model skills and the desire to make great portlets? This class will teach you how to build graphical portlets, grid portlets with summarized data, and tap into timescaled data with two-dimensional portlets.
Open Workbench | Tips and Tricks	EX1372	Presentation	theBasiX	Course description: “Looking for more value in Open Workbench? Learn tricks to decrease the time you spend on project management, as well as best practices around plans, baselines, and dependencies.” Download file is the slide deck used for the presentation.

Name	ID	Work Type	Location	Long Description
Open Workbench | Tips and Tricks - RegoU 2016	EX1166	Presentation	theBasiX	Looking for more value in Open Workbench? Learn tricks to decrease the time you spend on project management, as well as best practices around plans, baselines, and dependences.
Open WorkBench Basics - Module 1: Using Views	EX0185	Training - Video	theWorX	This video provides an overview of utilizing the various views available within Open WorkBench.
Open WorkBench Basics - Module 2: Updating the WBS	EX0186	Training - Video	theWorX	This video describes the process of creating new tasks and working with the Work Breakdown Structure (WBS) within Open WorkBench.
Open WorkBench Basics - Module 3: Building Dependencies	EX0187	Training - Video	theWorX	This video describes how to create and work with task dependencies within Open WorkBench.
Open WorkBench Basics - Module 4: Assigning Resources	EX0188	Training - Video	theWorX	This video describes the process to assign resources to tasks within OWB.
Open WorkBench Basics - Module 5: Transfer Assignments Wizard	EX0189	Training - Video	theWorX	Using the Transfer Assignments Wizard within OWB.
Optimizing Your Clarity PPM Support Team - RegoU15	EX1031	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on the elements of a successful Clarity PPM support team. The agenda covers the components of support, sample org charges, common support gaps, reducing support demand and finishes with keys to successful support.
Optimizing Your Clarity PPM Support Team: RegoU February 2014	EX0873	Presentation	theBasiX	RegoU Presentation from February 2014. Determining the right number of people to include in your Clarity PPM support team is essential to successful implementation. Find out how other Clarity PPM users are solving issues, discovering solutions, and successfully using Clarity PPM. Rego’s team of Clarity PPM experts will be there to guide the discussion and present industry best practices.
Optimizing Your Configuration of MSP with Clarity PPM - RegoU15	EX1032	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on interfacing MSP with Clarity PPM. The presentation covers installing the Clarity PPM MSP interface, MSP Option Setup, Opening the Project Schedule in MSP, Improving Performance, Customizing MSP Views and making them Global, Resource Availability vs Resource Calendar, Allocation, Understanding Task types, Task Constraints, Why Task Dates change, Maintaining and controlling the Project Schedule, MSP Prior Start, Prior Finish and Open for Time Entry Fields, Saving the Project Schedule to Clarity PPM and working off-line.
Organizational Change Management | Best Practices - RegoU 2018	EX1516	Presentation	theBasiX	Organizational change management is never done. Each new release, each new feature/function, and each new stakeholder require an amount of organization change management. This class will discuss some best practices for ongoing OCM related to Clarity PPM.
Outbound File-Based Integrations with External BI Extracts - RegoU 2018	EX1517	Presentation	theBasiX	Do you want to know more about building outbound integrations using a flat file placed on an SFTP Server? Does your organization have an external BI tool like Cognos, Tableau, Domo, or Qlikview? This session will review strategies for getting data into your corporate BI tools. We will also show Rego's data extraction tool and how it can be used for all outbound file-based integrations to save money and time.
Overview and General Navigation Course 2016	EX1247	Training - Doc	theWorX	This course will provide an overview of Clarity PPM functionality and provide basic navigation in the tool. Topics include: * Clarity PPM Overview * General Navigation * Home Menu and Favorites * Using List Views * Accessing Account Settings
OWB #6: Imposing Start & Finish Dates Video	EX0194	Training - Video	theWorX	This video describes the process either a Start or Finish date on a project in OWB. The date (start or finish) will determine the point from which all tasks in the project are then scheduled.
OWB #7: Autoschedule Video	EX0195	Training - Video	theWorX	This video describes the process to Autoschedule a project using OWB.
OWB #8: Setting the Baseline Video	EX0196	Training - Video	theWorX	This video describes the process to baseline a project using OWB.
OWB #9: Pending Actuals and ETCs Video	EX0197	Training - Video	theWorX	This video describes the process review and approve/reject Pending Actuals and ETCs within OWB.
OWB | Ongoing Use Tips & Tricks - RegoU 2018	EX1518	Presentation	theBasiX	Looking for more value in Open Workbench? Learn tricks to decrease the time you spend on project management, as well as best practices around plans, baselines, and dependencies.
Password Expression Builder	EX0994	Technical Trick	theBasiX	Clarity PPM allows you to create custom password rules using regex. This document lists expressions for a variety of password rule scenarios. Passwords with length limits default to between 6 and 20 characters. You can change this by editing the highlighted section of the expression. The number before the comma is the minimum password length, and the number after the comma is the maximum password length.

Name	ID	Work Type	Location	Long Description
Pending Actuals	EX0923	Portlet	theWorX	The Pending Actuals portlet displays pending actuals for resources by task. This portlet allows the user to filter on Project, Project Manager, Is Active and Is Open for Time Entry. This portlet provides Resource Managers and Project Managers a simple way to analyze which actuals have been submitted but not posted on specific tasks, as well as the aggregate pending hour total. Note: the information displayed is dependent on what the user has security rights to view.
Pending Actuals - Power BI	EX1558	Report	theWorX	Pending Actuals report provides the Project Managers a single place to view all the pending actuals on tasks across multiple projects. This report provides graphical representation (bar chart) of pending actual hours by business unit. User can further drill down the details by clicking on particular business unit Managers can use this portlet to analyze the actuals that have been submitted but not posted on tasks. You can further narrow your search by OBS Type & Path.
Pending Actuals (JS Report)	EX1464	Report	theWorX	Pending Actuals report provides the Project Managers a single place to view all the pending actuals on tasks across multiple projects. User can view only the projects that he has access to. Managers can use this portlet to analyze the actuals that have been submitted but not posted on tasks. You can further narrow your search by OBS Type & Path and Assignment Total.
Pending Contractor Termination Stalker	EX1004	Workflow Job	theWorX	The Pending Contractor Termination Stalker process sends email to Resource Manager if the Contractor(s) termination date is 3 weeks or less. This is an On Demand process in Clarity PPM named Contractor Reminders and can be manually executed from the Organizer. If there are number of processes in the Organizer – Available Processes, this process can be filtered and then checked to Start. When Contractor Reminders process is started it will be seen in the Initiated on the Processes tab. The process status can be monitored from Running to the Completed stage. The Progress when 100% and the Status is Completed an email would have arrived to the Resource Manager with subject: “Contractor(s) With Termination Date in 3 weeks or less”. This email will list the Contractors whose contracts will terminate on the identified date.
Performance Portlets - Oracle	EX1282	Configuration & App	theBasiX	We designed a Clarity PPM performance package that will give you visibility into the actionable performance data you’ve always wanted. We want to help you identify performance issues, guide you in addressing them, and provide you with tangible industry benchmarks. We want to assist in removing all performance related barriers to end user adoption. Portlets provided: Clarity Health Check Distinct Session by Hour Distinct Sessions by Hour and Day of Week Top Running Pages - Summary Functionality by Hour Top Running Pages - Details User Action Trace Performance Portlet Filter Session Summary Activity by Functionality The Download file available is a .pdf file that provided some additional detail on the Performance Portlets.
Planned Benefits by Goal - B. T.	EX1208	Portlet	theBasiX	Part of the Business Transformation Package, this pie chart portlet shows planned benefits across the system grouped by Goal. The data is displayed form the investments in a portfolio. The portlet lets the Portfolio Manager know on which GOAL the planned benefit is allocated, so as to target the overall investment spread in the portfolio.
Planned Benefits by Year Stacked by Category	EX1690	Portlet	theWorX	This Portlet starts by pulling Active Investments from a Classic UI Portfolio. It then looks for the Cost Plan of Record and its’ linked Benefit Plan. It then aggregates the Planned Benefit and groups it by Category, then presents a stacked bar chart.

Name	ID	Work Type	Location	Long Description
Planned Benefits by Year Stacked by Goal	EX1692	Portlet	theWorX	
Planned Benefits by Year Stacked by Objective	EX1691	Portlet	theWorX	This Portlet starts by pulling Active Investments from a Classic UI Portfolio. It then looks for the Cost Plan of Record and its' linked Benefit Plan. It then aggregates the Planned Benefit and groups it by Objective, then presents a stacked bar chart.
Planned Revenue - BT	EX1085	Portlet	theBasiX	Part of the Business Transformations collection, this portlet displays planned revenue as defined by a project whose goal is "Grow the business". It uses the Planned Revenue Query as a data provider. This portlet provides a holistic overview of how many projects following the goal "Grow the Business" are Critical/ At Risk / On Track with regard to the planned revenue.
Planned Savings - BT	EX1084	Portlet	theBasiX	Part of the Business Transformation collection, this portlet displays count of the planned benefits (savings) per project manager. It also displays if any of the planned benefits are Critical/ At Risk / On Track, along with the total planned benefit amount.
PM - Notification of Hard Booked Resources	EX1001	Workflow	theBasiX	This notification process sends an email to the Manager of an investment (Project, Application, Idea, etc.) when the resource assigned to the team has been hard booked. The process should be scheduled to run on a daily basis as the logic in it looks to all resources where their Booking Status has been changed from Soft to Hard on the day that the process is run. It compares the audit trail date change field to the system date. If the process is not scheduled to run daily no notification will occur on hard bookings from previous days.
PM Dashboard	EX0083	Portlet	theBasiX	The PM Dashboard portlet provides an overview of all projects for which the user is the Project Manager without navigating to and opening each project individually. All critical information related to the project status is displayed in this portlet. Status indicators display the project's statuses. Graphical stoplights and numbers provide an overview of all late Action items, Issues, Risks, Tasks, and Milestones.
PM Stalker - Submit Status Report	EX0084	Workflow Job	theWorX	The PM Stalker - Submit Status Report workflow process will email any project manager that has not submitted a status report in the last two weeks. This process will ensure that all status reports are kept up-to-date and provide management with a reliable overview of the status on the project.
PM Stalker: Project Validations & Issues	EX1458	Workflow	theWorX	"PM Stalker - Project Validations & Issues" executes various queries against the Clarity database and sends an email to all PMs who have one or more projects with any of the following conditions: " Resources have booked time in the past week (validation needed) " Inactive Resources with ETCs still on the project " Tasks past their Finish Date but not completed " Task Role Assignments in the past This notification will assist PMs to maintain their projects and keep them current.
PM Stalker: Projects Past Due	EX0884	Workflow Job	theWorX	Based on the pre-determined schedule frequency, this job will send an email to Project Managers that have a project meeting the criteria of: project(s) are active and scheduled finish date is less than the current date. This serves as a reminder to Project Managers to keep their schedules true. The contents of the email include a message indicating the project manager has at least one project meeting this criteria and a table indicating the Project ID, Project Name and Scheduled Finish Date.
PM Time Notification Process	EX1006	Workflow Job	theWorX	This process pulls in the total hours tracked, by resource, by task, for a given project for the weekly time period that ended. The information is sent to the Project Manager listed on the project. This process can be scheduled via the Execute a Process job.
PMO Continuous Assessment | Best Practices - RegoU 2016	EX1167	Presentation	theBasiX	Are you ready to implement a continuous improvement practice within your PMO? This class is a working session to help build and sustain a continuous assessment initiative within your PMO, helping to manage goals and objectives from start-up through maturity. We will also discuss growth mapping to processes, tools and strategic objectives.
PMO Maturity | Assessment	EX1373	Presentation	theBasix	Course description: "How mature is your PMO? Where do you go from here? This working session includes an exercise to assess how far you've come and help direct your course." Download file is the slide deck used for the presentation and the assessment document.
PMO Maturity | Assessment - RegoU 2016	EX1168	Presentation	theBasiX	How mature is your PMO? Where do you go from here? This class is a working session includes an exercise to assess how far you've come and help direct your course.
PMO Value Metrics | Tips and Tricks - RegoU 2016	EX1169	Presentation	theBasiX	Are you considering or analyzing PMO value metrics? This class is a working session will cover lessons learned in PMOs, so you can craft guiding metrics, with or without a tool.

Name	ID	Work Type	Location	Long Description
Populate Resource Calendar Data	EX1206	Workflow	theWorX	A Resource Calendar sub-object is populated by a non-object-specific process, executed by the “Execute a Process” job, which can be scheduled. The first 7 rows of the sub-object display the standard week from the base calendar, including columns for Day of Week, Is Workday (checked/unchecked), Shifts, and work Hours available. The remaining rows display calendar exceptions, including columns for Day of Week, Exception Date, Is Exception (checked), and work Hours available. If exception changes to a workday, Is Workday column is checked, and Shifts also display. If exception changes to a non-workday, Is PTO column is checked. Resource Calendar object is filterable by Calendar Entry Type (All, Calendar Exception, Day of Week), Day of Week, Exception Date Range, Is Workday, Is Exception, Is PTO, and power filter.
Populate Timesheets	EX1673	Workflow	theWorX	A Single Page explainer document that shares information on Rego's Action Item Responder.
Porfolio Planned Benefit by Objective - BT	EX1080	Portlet	theBasiX	Part of the Business Transformation collection, this pie chart portlet displays realized benefit, grouped by category for portfolio investments. It uses System Provider: Portfolio Investment Provider.
Portfolio Hierarchy List - B. T.	EX1207	Portlet	theBasiX	Part of the Business Transformation Package, this portlet displays the portfolios with hierarchy (child portfolio(s)). The portlet displays the basic portfolio fields like – manager, stakeholder, etc. A Metrics subpage can be created with the fields on the “Properties – Metrics.”. The fields: Overall Health, Goal Alignment, Innovation Level, Probability of Success are custom fields and can be configured on this subpage (see screenshot 2).
Portfolio Investment Cost Plan Status	EX1111	Portlet	theWorX	The portlet shows which investments within a portfolio has a cost plan and those that do not. For the ones which do have a cost plan, the Cost Plan? Field shows a Green checkmark. For the ones which do not have a cost plan, the Cost Plan? Field shows a Red cross.
Portfolio Management | Best Practices - RegoU 2016	EX1170	Presentation	theBasiX	Starting a portfolio management implementation or investigating its potential? Learn how to use Portfolio Management in Clarity PPM, including prerequisites like resource and financial management, scenarios, viewing capacity impacts, best practice for portfolio organizations, and setting up effective targets.
Portfolio Management | Implementation Best Practices	EX1374	Presentation	theBasix	Course description: “Starting a portfolio management implementation or investigating its potential? Learn how to use Portfolio Management in Clarity PPM, including prerequisites like resource and financial management, scenarios, viewing capacity impacts, best practice for portfolio organizations, and setting up effective targets.” Download file is the presentation slide deck.
Portfolio Management | Implementing Best Practice - RegoU 2016	EX1171	Presentation	theBasiX	In this class, we’ll discuss reasons for using portfolio management and what you need to start.
Portfolio Management | OOTB Introduction - RegoU 2018	EX1519	Presentation	theBasiX	Do you want to understand the Out Of The Box configuration and functionality of portfolio management? In this class, we will review the OOTB objects, views, views, and functions of portfolio management.
Portfolio Management | Overview - RegoU 2016	EX1172	Presentation	theBasiX	Do you want to see and understand the out of the box portfolio management functionality in Clarity PPM? In this class, we will review portfolio management within Clarity PPM.
Portfolio Management | Round Table	EX1375	Presentation	theBasix	Course description: “Do you want to know the best practices for implementing portfolio management? In this moderated Round Table on best practices, we’ll discuss reasons for using portfolio management and what you need to start.” Download file is the presentation slide deck.
Portfolio Management | Round Table - RegoU 2016	EX1173	Presentation	theBasiX	Do you want to understand what other companies are doing well or struggling with related to portfolio management? In this facilitated round table, we will discuss key questions and use cases.
Portfolio Management | Round Table - RegoU 2018	EX1520	Presentation	theBasiX	Do you want to talk to other customers that are using or plan to use portfolio management? In this moderated Round Table where customers can share experiences and provide insights on process, configurations, challenges, and successes. We will divide into small groups and discuss customer selected topics - 100% sharing
Portfolio Management Overview - RegoU 2015	EX1009	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on Clarity PPM Portfolio Management. The agenda covers an overview of Portfolio Management, the value of Portfolio Management, challenges, and Rego Keys to Success.

Name	ID	Work Type	Location	Long Description
Portfolio Management Process: RegoU February 2014	EX0875	Presentation	theBasiX	RegoU Presentation from February 2014. Effective project portfolio management can be a game changer. However, most organizations don't understand what it really means and how to implement it. Portfolio management is all about demand planning and investment rationalization. Providing enough information about investments to make informed decisions is at the heart of Clarity PPM's portfolio management functionality. In this session, you will learn about Clarity PPM's portfolio management functionality in detail and how that functionality can be used within an overall portfolio management process.
Portfolio Planned Benefit by Type - BT	EX1079	Portlet	theBasiX	Part of the Business Transformation collection, this pie chart portlet displays realized benefit, grouped by type of project, for portfolio investments. It uses System Provider: Portfolio Investment Provider.
Portfolo Health Aggregate	EX1097	Workflow	theWorX	Process Workflow populates the three Portfolio Health Factors (on Metrics page) by aggregating the portfolio investment factors from the most recent Final project Status Report instances. This causes the Portfolio Overall Health to be calculated. The factors are then locked. Criteria for selection of investments is to be in a portfolio. If an investment does NOT have a status report, it is excluded from the calculation. This process is run at the global level by using the Execute a Process job. Job may be run on-demand or scheduled.
Portlets | Advanced	EX1376	Presentation	theBasix	Course description: "Are you ready to go beyond simple graph and grid portlets? This class will show you how to create and export portlets with hierarchical structure and drill-down capability, and includes examples of advanced portlets and complex queries." Download file is the presentation slide deck.
Portlets | Advanced - RegoU 2016	EX1174	Presentation	theBasiX	Are you ready to go beyond simple graph and grid portlets? This class will show you how to create and export portlets with hierarchical structure and drill-down capability, and includes examples of advanced portlets and complex queries.
Portlets | HTML Advanced - RegoU 2016	EX1176	Presentation	theBasiX	Have you ever wanted to build some portlets that were not limited by the out-of-the-box portlet types? This class will explore some of the options to build eye-popping portlets using HTML, including calendars, Kanban boards, tile based project lists, and some special Star Wars themed communication portlets.
Portlets and NSQL Queries	EX0085	Portlet	theWorX	The Portlets and NSQL Queries portlet displays portlets built from queries. The portlet provides the administrator with the ability to search queries developed in the past that may have a certain attribute within it. This is helpful during upgrades when CA makes data model changes.
Portlets on Pages	EX0086	Portlet	theWorX	Portlets on Pages displays portlets located on each page within Clarity PPM. This portlet is useful for administrators to determine which users have customized their pages and if they are not seeing a certain portlet, or if a user has placed a portlet on another page and needs help locating it. It also shows the portlet code, name, page the portlet resides on, tab type, who created the tab, source type, and the object/query.
Power BI - On Premise & On-Demand - Part 1 - Webinar	EX1602	Presentation	theBasiX	This webinar covers topics from one of our most popular regoUniversity classes. Are you looking for alternatives to Jaspersoft Dashboards? Do you have a corporate standard BI tool like Spotfire, Qlickview, Power BI or Tableau? Do you know that CA will soon enable the ability to connect these tools to your Clarity PPM in On Demand environment? And if you are on-premise, you can actually do this today. This webinar will review principles of dashboarding, train you on using Power BI and show you how to build an interactive dashboard. You will see examples of dashboards which are focused on project, resource and portfolio management. This is part 1 of a two part series. The second will be offered in the fall, after Clarity PPM 15.3 releases.
Power BI - On Premise & On-Demand - Part 2 - Webinar	EX1603	Presentation	theBasiX	This is part 2 of our popular Power BI webinar series. Are you looking for alternatives to Jaspersoft Dashboards? Do you have a corporate standard BI tool like Spotfire, Qlickview, Power BI or Tableau? Did you know that CA's recent release of v15.3 brings the enable the ability to connect these tools to your Clarity PPM in On Demand environment using OData? Join Rego expert guides Atul Kunkulol and Sankhadeep Dhar as they review the principles of dashboarding, review Power BI, and show you how to build an interactive dashboard. You will see examples of dashboards which are focused on project, resource and portfolio management.
PowerBI Dashboards | Beginner - RegoU 2018	EX1521	Presentation	theBasiX	Clarity PPM now allows an external ODTA connector. Do you want to see the capabilities of PowerBI and how this BI tool can be used to report against the Clarity PPM database? This class is a hands-on beginner training class for PowerBI - learn how to build basic reports against the Clarity PPM data warehouse.

Name	ID	Work Type	Location	Long Description
PPM Data Dictionary Extractor	EX1573	Workflow	theWorX	The PPM Data Dictionary Extractor pulls schema and attribute information from each object in Clarity PPM and places it in a custom object. The following fields provide details information about each attribute in the Clarity PPM Instance. • Object Name – The name of the object to which the attribute belongs • Object Code – The external ID of the object to which the attribute belongs • Attribute Name – The name of the attribute • Attribute Code – The external ID of the attribute • Partition Code – The partition to which the attribute belongs • Table Name – The database table where the attribute is located • Column Name – The database column name of the attribute • Data Type – The data type of the attribute • Data Size – The character limit of the attribut3e • Data Scale – The scale of numeric attributes • Is Active – Specifies if the attribute is active • Extended Data Type – The extended type of the attribute (ex: lookup, money, etc) • Lookup Name – The name of the attributes lookup • Lookup Type – The external ID of the attribute's lookup • Default Value – The default value assigned to the attribute • API Alias – The REST API alias assigned to the attribute • Max Value – The maximum value accepted by the attribute • Min Value – The minimum value accepted by the attribute • Curve Name – The name of the Curve for Time-Scaled value attributes • Curve Type – The type of the Curve for Time-Scaled value attributes • Is Custom – Is the attribute a stock attribute or custom • Is Auto-Numbered – Is auto-numbering enabled for the attribute • Is Multi-Valued – Is the attribute a multi-valued lookup • Is DWH Enabled – Is the attribute enabled for export to the data warehouse • Is Editable – Is the attribute editable or read-only
PPM Governance | Framework	EX1377	Presentation	theBasix	Course description: "Are you struggling with decision making processes? This session will show you the ins and outs of how a good governance framework provides the foundation for better project decisions to help achieve goals and finish on time and within budget." Download file is the presentation slide deck.
PPM Process | Best Practices - RegoU 2016	EX1177	Presentation	theBasiX	Did you implement tool functionality without best practice processes? This class will review some of the critical business processes that we recommend organizations put in place before implementing a PPM tool. We will provide tips and tricks on defining process frameworks while leveraging tools for successful enablement.
PPM Processes | Best Practices	EX1378	Presentation	theBasix	Course description: "Did you implement tool functionality without best practice processes? This class will review some of the critical business processes that we recommend organizations put in place before implementing a PPM tool. We will provide tips and tricks on defining process frameworks while leveraging tools for successful enablement." Download file is the presentation slide deck.
PPM Roadmap - white paper	EX1615	Presentation	theBasiX	"Of course we have a plan for PPM!" This might be the response of any organization that's considering PPM or has a solution in place. But having the technology doesn't necessarily mean having an effective plan for it. This white paper breaks down what it means to have a strategic PPM roadmap, and why your organization should always keep it current and close at hand. We'll define the elements that make a roadmap effective and provide seven reasons it can make the business journey worthwhile.
PPM Roadmap | Always Have a Vision - RegoU 2018	EX1522	Presentation	theBasiX	We have found that one of the keys to long term success within PPM is to have a living strategic roadmap. An organization must have a vision of where they want to be and must keep moving forward. This session will review the key elements needed to create an effective roadmap that can drive increased maturity and excitement within your organization.
PPM Roadmap: Always Have a Vision - Webinar	EX1630	Presentation	theBasiX	How well are you sticking to your roadmap? Great roadmaps drive an organization and support PPM adoption and maturation. They tend to fall into two categories, those meant to steer an existing platform and those that lay the foundation for a new platform. Both roadmaps account for all of your organizational variables: Corporate strategy PPM vision and aspirations Process and tool maturity Join Jen Scarlato, Wes McCoubrie, and Jacob Cancelliere for a swashbuckling conversation about strategic roadmaps, best practice methodology, and the real-world examples that can get you where you want to go.

Name	ID	Work Type	Location	Long Description
Preparing Metrics That Matter: RegoU February 2014	EX0876	Presentation	theBasiX	RegoU Presentation from February 2014. Executives always want to see metrics that help them analyze the work being done within their organization. It is important to show them metrics that they can leverage to drive behavior and increase productivity and success. Learn how to prepare information that is clear and informative. Come find out what is available in Clarity PPM, how to automate reporting, available objective and subjective metrics, and how to implement metrics within an organization.
Process Instance Errors	EX0087	Portlet	theWorX	The Process Instance Errors portlet will show all processes that error. This portlet will assist the administrator with determining which processes are in error and whether to skip, retry, or cancel. It will display the process name, code, start date, and who initiated the process. You may also filter by any of the criteria listed in the grid.
Process to Reschedule Projects	EX1000	Workflow Job	theWorX	The Process to Reschedule Projects helps a Project Manager easily push an entire Project or Idea schedule out to a new start date. Once the three custom attributes are added to views of an Idea or Project the PM can trigger the process by entering a date in the New Start Date field and checking off the Shift checkbox. The process runs automatically on Save. This process works by determining the date difference between the original Project or Idea start date and by shifting all allocations, tasks and assignments out equally by that number of days. For example, if a Project is set to begin on January 1st but instead needs to be pushed to a February 1st start date the process first determines that there are 31 days between the original start date and the new date. Next the process increases the start date for each task, allocation and assignment by 31 days. NOTE: The process will shift allocation dates regardless of resource restrictions such as a termination date or non-working time as marked on their calendar. The Team page will reflect the Available Start and Finish as shifted by the process, but the Allocation hours and % will take unavailable time into account. IE if a shift process sets the start date for a resource to be after their date of termination the dates will change by the date difference but the Allocation hours will correctly be calculated as zero. - See site for continued description
Product Cost by Goal	EX0175	Portlet	theWorX	The Product Cost by Goal portlet displays the planned cost of all active products within a timeframe, summarized by goal in a pie chart. This portlet provides management with a quick overview of cost by goal within a year without navigating to each product individually.
Product Cost by Year	EX0174	Portlet	theWorX	The Product Cost by Year portlet displays active product cost by year, summarized by goal. The product cost is pulled from the product's planned cost and is displayed by year, with colors representing each product goal. This portlet provides management with a quick overview of all product costs without having to navigate to each product individually.
Product Risk by Goal	EX0230	Portlet	theWorX	The Product Risk by Goal portlet displays a count of active products by goal with a sub-count by risk. The graph is color-coded by risk rating: • 1-33 – Green • 34-66 – Yellow • 67-100 – Red The portlet provides a quick overview of the risk rating for each product within each goal.
Program - Executive Dashboard - Power BI	EX1559	Report	theWorX	Program Executive dashboard provides PMO's a single place to view critical information of projects associated with a program (s). Critical information includes # of Late change requests, Late risks, Late Issues, Late Milestones and Late Tasks. It also displays key parameters such as Status and Variances. Various Status associated with projects are displayed in the form of bar chart with each bar indicating a particular category. Rest of the key parameters are displayed in the form of a grid. You can further narrow your search by Program(s) and Project(s).
Program Cost Plan Summary	EX1305	Portlet	theWorX	The Program Costs portlet looks like a cost plan. It will summarize all cost plans from projects within the program and display the totals.

Name	ID	Work Type	Location	Long Description
Program Dashboard: Sub-Project Action Items	EX0948	Portlet	theWorX	The Program Dashboard Sub Project Action Items portlet display Action Items of Sub Projects in a Program. The portlet will pull the "Action Items" from all the sub projects in the Program, and this information is placed on the Dashboard tab. This portlet displays each Project, name of the Action Item as mentioned in the Subject, and the resource who Created this Action Item. Assigned To field will display the resource to whom the Action Item has been Assigned. Due Date mentions the date the Action Item will be completed and the Priority level of the Action Item is a stoplight showing red, yellow and green for the different levels of priority.
Program Dashboard: Sub-Project Change Requests	EX0898	Portlet	theWorX	The Program Dashboard Sub-Project Change Requests portlet gives the ability to view all change requests of sub-projects of a program. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the dashboard tab. The portlet sorts the issues first by status, in descending order, and then by target date. It displays the sub-project name, change request name, owner, status, target date, approved by, and the priority.
Program Dashboard: Sub-Project Open Issues	EX0900	Portlet	theWorX	The Program Dashboard Sub-Project Open Issues portlet gives the ability to view issues on sub-projects of a program that are not closed or resolved. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the dashboard tab. The portlet sorts the issues first by priority and then by target date. It displays the sub-project name, issue name, owner, target date, status and priority.
Program Dashboard: Sub-Project Open Risks	EX0905	Portlet	theWorX	The Program Dashboard Sub-Project Open Risks portlet gives the ability to view all risks on the sub-projects of a program that are not closed or resolved. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the dashboard tab. The portlet sorts the issues first by value, in descending order, and then by target date. It displays the sub-project name, risk name, owner, target date, status, probability, impact and value.
Program Dashboard: Sub-Project Status	EX0907	Portlet	theWorX	The Program Dashboard Sub-Project Status portlet gives the ability to view the most recent status report for all sub-projects on a program. The portlet will pull the "id" from the page it is placed on, so this portlet is usually placed on the dashboard tab. This portlet displays each sub-project, type of status, and the symbol related to the severity.
Program Executive Dashboard	EX0088	Portlet	theWorX	The Program Executive Dashboard portlet displays information regarding sub-projects on a program. It provides a one-stop place for the PMO or management to view all critical information about projects under a specific program. The portlet displays status indicators, dates for late items, variances and days over base, it also displays the project status fields from the Status Report subobject.
Program Management | Best Practices - RegoU 2016	EX1178	Presentation	theBasiX	Is your company considering funding programs instead of projects? This class will explore the best practice use of programs within Clarity PPM. We will discuss out of the box features and limitations and provide use cases for organizations effectively using program management.
Program Management | Best Practices - RegoU 2018	EX1523	Presentation	theBasiX	Do you want to know the best practices for implementing program management within Clarity PPM? More and more companies are moving to a form of program management, where projects may not be individually funded, but programs are funded instead. We will walk through how to leverage Clarity for program management, including use cases and what can and cannot be used OOTB.
Program Management Course 2016	EX1248	Training - Doc	theWorX	This course will provide an overview of Clarity PPM Program Management functionality. Topics include: * Portfolios vs. Programs vs. Projects * Differences between Programs and Master Sub Projects * Accessing and Creating a Program * Adding Subprojects to the Program + Subprojects Link + Hierarchy Tab * Creating a Program Key Milestone * Using the Gantt Chart * Other Program Tabs * Managing Programs vs. Projects
Project / Financial Management | Best Practices - RegoU 2018	EX1528	Presentation	theBasiX	Are you starting a project / financial management implementation, or do you want to compare how you are using these functions vs. others or best practices? In this class we will discuss some best practices from successful customers.
Project Actions and Options Menus QRC	EX1262	Training Document	theBasiX	A Quick Reference Card to assist in using the Actions and Options Menus, within the Project Properties Tab, Team Tab, Task Tab and Financial Plans in Clarity PPM.

Name	ID	Work Type	Location	Long Description
Project Allocation Uploader	EX1301	Workflow	theWorX	The interface runs using a MS Excel template called Project Allocation Upload that will be distributed to users. 1) Configuration a. A master object called Allocation Upload Files will be created. The object will contain a required attachment field on the create page that will receive the Project Allocation Upload MS Excel file. b. A new sub-object called Allocation Upload Records will be created. This object will contain the fields necessary to receive the data rows from the Project Allocation Upload template. c. The master object will store the file level data while the sub-object will store the rows that belong to the file. d. Users must be granted security to view and edit the master and sub-objects in order to run the upload process. 2) Project Allocation Upload Template a. The Project Allocation Upload template must remain static. Any changes other than creating additional time periods or additional rows will cause the process to error. b. Only the Project Allocation Upload template can be used to load records to the new objects. c. The Project Allocation Upload will only accept months across the x-axis in the format DD/MM/YYYY. The month headers must appear in the first row of the template and contain the first day of the month. d. The template must be distributed to the users that will be using the upload functionality. e. Users will be required to enter an Investment ID and Resource ID so the process can correctly identify investments and resources to upload the allocation hours against. f. A Staff OBS is not required but can be populated by users to have the data uploaded into Clarity PPM. g. The owner of the Project Allocation Upload template is responsible for providing
Project Attachments	EX0089	Portlet	theWorX	The Project Attachments portlet displays all attachments located on every project, regardless of security rights. This portlet is useful for not only the PM, but also the PMO to determine if a document has been uploaded for the toll gating process. It will also display the folder type, folder path, folder name, and file name. You have the ability to filter by project name, code, file name or file name.
Project Budget vs Planned vs Actual by Month	EX1105	Portlet	theWorX	This portlet shows the project costs by Month. The information displayed includes: Start Date for project End Date for project Budgeted Cost Planned Cost Actual Hours This provides the PM with a one shot view of the total financials/actuals for the project. The Project name field is linked to the project properties page. In case of any adjustments, the PM can toggle b/w the portlet and the project with ease. The user can filter on multiple projects, or projects by OBS, or by PMs, to view the data on the portlet.
Project Budget vs Planned vs Actual by Month - Power BI	EX1574	Report	theWorX	Project Budget vs Planned vs Actual by Month report provides the Project Managers a single place to view Project Budget, Planned and Actual Cost for multiple projects. This report displays Project Budget vs Planned vs Actual by Month in the form of clustered bar chart over a period of time. User can further drill down the information to investment level by selecting a particular bar within the chart. User can further narrow their search by OBS Type & Path, Project(s), Project Manager, Month Start and End Date.
Project Budget vs Planned vs Actual by Month (JS Report)	EX1454	Report	theWorX	Project Budget vs Planned vs Actual by Month report provides the Project Managers a single place to view Project Budget, Planned and Actual Cost for multiple projects. Project Managers can use this view to compare various costs for that project in a particular month. User can further narrow their search by OBS Type & Path, Is Project Active?, Fiscal Month Start Date, Investment Manager and Investment Name.
Project by Indicatior - Pie (JS Report)	EX1468	Report	theWorX	Projects by Indicator is a pie chart that displays count of projects by out of box Status Indicator attribute. Legend displays the colors associated with various Status Indicator values. Mouse over the pie chart slice displays the count of projects associated with that respective Status Indicator value. You can further narrow your search by OBS Type, OBS Path, Project Manager and Is Project Active?

Name	ID	Work Type	Location	Long Description
Project by Stage and Manager - Power BI	EX1566	Report	theWorX	Project Count by Stage is a bar chart that displays count of projects by out of box Stage attribute. Stage attribute values are plotted on Y axis. Label on the bar chart slice displays the count of projects associated with that respective Stage value. User can further drill down the information to investment level by clicking on particular bar slice. You can further narrow your search by OBS Type & Path, Investment Manager.
Project Change Request Count w Drilldown	EX1074	Portlet	theWorX	The portlet, Project Change Request Count Pie with drill-down is a simple pie that displays the total count of projects in the pie. The slices are: • Projects with 0 change requests • Projects with 1 change request • Projects with 2-5 change requests • Projects with 5-10 change requests • Projects with over 10 change requests The drill down grid provides the details behind any of the slices. Clicking on any of the segments, e.g. 11, redirects to the Projects with Change Requests portlet.
Project Close Process	EX0090	Workflow Job	theWorX	The Project Close Process workflow process aides the Project Manager in some routine close out tasks that accompany every project. Marking the project inactive starts the process and it will continue down one of two paths: 1. Once the project is inactive, the process will then check to see if there is no remaining estimate to complete (ETC) still on the project. If there is ETC leftover, then the process will go into a waiting state for 14 days to allow the project manager to cleanup or to cancel the process if it was done in error. After 14 days, the process will check to see if the project is active again. If the project is active, then the process will end. However, if the project is still inactive, the process will continue with the closeout activities. 2. If the project is marked inactive and has no ETCs, then the process will immediately move to the closeout activities. The closeout activities include: ~ Turning off time entry for the project, tasks and project members ~ Updates the ETC, proposed ETC, and pending estimates to 0 ~ Updates the task status and assignment status to Completed ~ Sets the task, assignment and project finish dates to today's date only if the finish dates are after the process run date ~ Sets all Risks and Issues to Closed with a resolution of "## This was closed automatically as part of the project close process ##" Set future hard allocation and allocation finish dates to today when the date is after today's date
Project Compliance Stalker - PM	EX0951	Workflow Job	theWorX	The Project Compliance Stalker – PM sends an email to Project Managers (and also their managers if so desired) at a set interval to alert them to project compliance issues. Areas of compliance that are reviewed include: stale project tasks (stale = past due date), late issues and risks (past due date) and late status reports.
Project Cost by Vendor	EX1093	Portlet	theWorX	The portlet shows the project spend to vendors by month. The Vendor field picked on the portlet comes from the Vendor mentioned when creating the voucher (as displayed on the first screenshot). This provides a nice view of identifying how much is spent by an organization on the vendor employees on their workforce.
Project Cost Plan Variance	EX0093	Portlet	theWorX	The Project Cost Plan Variance portlet displays the variance between the budget and cost plans for projects the logged in user has security rights to view. The total for the Cost Plan that is marked as the Plan of Record for the project (Current Cost Plan Total), alongside the total for the current approved Budget Plan (Current Budget Plan Total). These two values are then compared in order to generate the total current Variance for the project. A positive amount in the Variance column indicates the project is under budget, while a negative amount indicates the project is over budget. Results may be filtered by: Project ID, Project Name, Manager, and whether the project is Active (Yes, No, All). By default, the portlet will display only Active projects.
Project Cost Within Budget	EX0094	Portlet	theWorX	The Project Cost Within Budget portlet shows all projects that are within or exceeding their budgets in a pie chart. The user may filter by OBS and finish dates to narrow the projects. This portlet provides management with a graphical representation of the overall status of cost on all projects.
Project Cost Within Budget - Power BI	EX1567	Report	theWorX	Project Cost within Budget report displays count of projects that are within or exceeding budget in the form of a bar chart. It also displays Total budget cost and Planned cost. User can further drill down the details to investment level. You can further narrow your search by OBS Type & Path and Investment Manager.
Project Cost Within Budget (JS Report)	EX1444	Report	theWorX	Project Cost within Budget report displays count of projects that are within or exceeding budget in the form of a pie chart. This report provides management a graphical representation of cost status on all projects. Mouse over on the pie chart displays count of projects for that category. You can further narrow your search by OBS Type & Path, Project Manager, Project Status, Project Stage, Program Name, Is project Active? And Is Template?.
Project Count by Stage - BT	EX1088	Portlet	theBasiX	Part of the Business Transformation collection, this bar-chart portlet displays number of investments per stage. This provides a holistic overview of where the projects are within the organization.

Name	ID	Work Type	Location	Long Description
Project Count by Stage - Pie	EX1113	Portlet	theBasiX	The portlet, Project Count by Stage is a simple pie chart based on stage OOTB field. Segments are No Stage, Initiation, Planning, Building, Closing. Data ca be filtered by OBS and Project Manager.
Project Count by Stage - Power BI	EX1568	Report	theWorX	Project Count by Stage report has Stacked Column chart that displays count of Projects by Stage such as Initiation, Building, Planning etc. Also, there is a table view with Project ID, Project Name, Project Manager and Actual hours details. User can further narrow their search by OBS Type & Path.
Project Count by Stage (JS Report)	EX1457	Report	theWorX	Project Count by Stage is a bar chart that displays count of projects by out of box Stage attribute. Stage attribute values are plotted on X axis. Mouse over the bar chart slice displays the count of projects associated with that respective Stage value. You can further narrow your search by Is Project Active?, Methodology and Stage.
Project Count by Stage with Drill down	EX1073	Portlet	theWorX	The portlet, Count by Stage with Drilldown is a simple pie based on stage OOTB field. The drill down portlet has stage as a column. Clicking on any of the segments, e.g. Planning, redirects to the Projects by Stage Drill portlet.
Project Dependencies	EX1657	Portlet	theWorX	The Project Dependencies portlet displays all projects and their associated dependencies that the logged in user has rights to. This can assist in scheduling and visualizing the breakout of dependencies. The table below describes some of the available columns in the portlet. Column Label Description Project ID ID of the project Project Name Name of the project Type Relationship to above project, Parent Project (P) or Sub Project (S) Manager Manager of the project Start Start Date of the project Finish Finish Date of the project Gantt Visualization of project timelines Sort Column Used to order the columns for proper display of the portlet
Project Estimation | Best Practices - RegoU 2016	EX1179	Presentation	theBasiX	Does project and idea estimation take too long and lack visibility? This class will address one of the most common pain points within organizations: how to involve the right people within a timely project estimate. Learn Rego's model for defining, calculating, and modifying idea and project estimates, so you can increase throughput and ROI.
Project Estimation Module	EX1467	Configuration &	theWorX	The Rego Estimation Module Provides a more accurate estimate earlier in the idea/project lifecycle. * Is applied consistently so it can be improved. * Retains the data in Clarity to enable analysis. * Provides ongoing feedback by comparing estimates to current EAC. * Provides historical record of estimating for projects overall as well as change requests.
Project Financial Management | Round Table	EX1379	Presentation	theBasix	Course description: "Do you want to know the best practices for implementing financial management? In this moderated Round Table on best practices, we'll discuss setting up financial management, financial planning, and transaction processing." The download file is the presentation slide deck.
Project Financials | PPM vs. Finance Views - RegoU 2018	EX1524	Presentation	theBasiX	• ITFM Introduction • PMO & IT Finance Collaboration • Where ITFM and PPM Meet • Connecting PPM with ITFM
Project Health by PM - Power BI	EX1668	Report	theWorX	Project Health by PM is a dashboard that contains multiple visualizations showing various KPIs of projects managed by a project manager. Dashboard shows KPIs like summary of Over Due tasks, Critical tasks, Unfilled roles on Project, Effort and Schedule variance etc. Spend this month – Area graph that shows Actual vs Budget cost for current month. Spend and Budget by Year – Ribbon chart that shows yearly distribution of Actual vs Budget cost. Project Map by Estimated time left – Tree map representing ETC hours remaining on each project. Team – Grid section that shows list of team members with respective Actuals and ETC hours. Actual Hours, Allocated Hours and ETC Hours by Fiscal Month – Area graph that shows monthly distribution of Actuals vs Allocation vs ETC.

Name	ID	Work Type	Location	Long Description
Project Management - Clarity PPM	EX1252	Training - Doc	theWorX	This course will provide an overview of Clarity PPM Project Management functionality. Topics include: * Overview + What is Project Management + Clarity PPM Terms and Definitions * Managing Projects + Accessing Projects and Applying Custom Filters + Creating Projects (New vs. New From Template) + Accessing & Updating Project Properties and Subpages * The Work Breakdown Structure (WBS) + Work Breakdown Structure Overview + The Tasks Tab + Gantt View Overview + Creating Tasks Using the Gantt View + Gantt View Timescale and Configuration * Staffing the Team + The Four A's: Availability, Allocation, Assignments, and Actuals + Booking Statuses + Adding Resources and Roles + Using In-line Editing to Update Team Information * Assignment to Task + What is Estimate to Complete (ETC)? + Assigning Roles / Resources to Tasks + Replacing a Role with a Resource
Project Management | Best Practices	EX1380	Presentation	theBasix	Course description: "Do you want to know the best practices for implementing project management? In this class, we'll discuss reasons for using project management and what you need to start." Download file is the presentation slide deck.
Project Management | Best Practices - RegoU 2016	EX1180	Presentation	theBasiX	Do you want to know the best practices for implementing project/financial management? In this class, we'll discuss reasons for using project/financial management and what you need to start.
Project Management | OOTB Introductions - RegoU 2018	EX1525	Presentation	theBasiX	Do you want to understand the OOTB configuration and functionality of project management? In this class, we will review the OOTB objects, views, views, and functions of projects, financial plans, tasks/assignments, IRC, and other related areas.
Project Management | Round Table	EX1381	Presentation	theBasix	Course description: "Do you want to know the best practices for implementing project management? In this moderated Round Table on best practices, we'll discuss managing projects, scheduling, and working with teams." Download file is the presentation slide deck.
Project Management | Round Table - RegoU 2018	EX1526	Presentation	theBasiX	Do you want to talk to other customers that are using or plan to use project management? In this moderated Round Table where customers can share experiences and provide insights on process, configurations, challenges, and successes. We will divide into small groups and discuss customer selected topics - 100% sharing.
Project Management Overview - RegoU 2015	EX1010	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on Project Management in Clarity PPM. The agenda covers an overview of project components, the value of project management, challenges, and Rego Keys to Success.
Project Manager - Resource Compliance - Power BI	EX1572	Report	theWorX	Project Manager- Resource/Compliance report provides project managers a single place to view Compliance status for various critical KPIs. All the KPIs are depicted in various visualizations. • Unfilled Demand: Donut chart that gives you the count of roles (within projects) that are not filled by resources. • # Of New team members: Scorecard that displays the count of new team members added to the projects. • Resource Constraints: Donut chart that gives you the count of Over utilized and underutilized resources • Unsubmitted Time: Dial gauge that displays the count of resources that did not submit time. • Stale Tasks: Dial gauge that displays the count of tasks that are past their due date • Status Report Compliance: Dial gauge that displays the compliance of status reports for various projects. You can further narrow your search by Project Manager
Project Manager | Best Practice – A Day In the Life - RegoU 2016	EX1181	Presentation	theBasiX	This class will provide a list of daily and weekly activities that every project manager should follow to leverage Clarity PPM more effectively.

Name	ID	Work Type	Location	Long Description
Project Manager | Best Practice "Day in the Life" - RegoU 2018	EX1527	Presentation	theBasiX	This class will provide a list of daily and weekly activities that every project manager should follow to leverage Clarity PPM more effectively.
Project Manager | Best Practice Day in the Life	EX1382	Presentation	theBasix	Course description: "This class will provide a list of daily and weekly activities that every project manager should follow to leverage Clarity PPM more effectively." Download file is the presentation slide deck.
Project Manager Costs/Effort - Power BI	EX1578	Report	theWorX	Project Manager Cost/Effort report provides project managers a single place to view Compliance status for Cost/Effort KPIs. All the KPIs are depicted in various visualizations. Dial Gauges for Cost: Three gauges are depicted here (Budget vs. Planned, Budget capex vs. Planned Capex , Budget opex vs. Planned opex) Each gauge has 3 different color segments (red, yellow and green) Red: Budget < Planned Yellow: Abs(Budget – Planned) is within 5% Green: Budget>Planned Plan Burn: Pie chart displaying Actual cost percentage and Remaining cost (Planned – Actual) cost percentage. Pending Actuals: Scorecard that displays pending actuals on the selected investment. Posted Actuals: Scorecard that displays actuals that are posted on the selected investment. You can further narrow your search by Investment.
Project Status and Cost	EX1092	Portlet	theWorX	The portlet shows the Overall Status and Budget Status and Amounts. It displays one row per project. The portlet shows the following main fields: Overall Status, Budget Status, Capital Budget, Operating Budget, Total Budget, Capital Planed, Operating Planned, Total Planned, Capital Actuals, Operating Actuals, Total Actuals, Budget Variance ($), Budget Variance (%)
Project Status and Cost - Power BI	EX1569	Report	theWorX	Project Status and Costs report has the details of the Project Schedule, Scope, Cost and Effort Statuses along with Planned, Budget & Actuals costs. There is also graphical representation that shows Top 10 projects by Planned Cost, Budget vs Planned vs Actuals by Cost Type. User can further narrow their search by OBS Type & Path, Project(s) and Project Manager.
Project Status and Costs (JS Report)	EX1449	Report	theWorX	Project Status and Costs report gives the Project Manager a single place to view various Project Statuses (Cost and Effort, Schedule, Scope and Overall) and Costs (Planned, Budget & Actuals) for multiple projects. User can further narrow their search by OBS Type & Path, Project Name, Project Manager and Is Project Active?.
Project Time Sumary	EX0889	Portlet	theWorX	Project managers may use this portlet to show the planned effort and the remaining effort on projects. Includes actual hours as well as estimate at completion. You may narrow the results by filtering by project name, project manager, project OBS, or active flag. The portlet will display each project by ID, name, project manager, planned effort (total allocation hours), actual hours, remaining effort (ETC), and estimate at complete (actual + ETC).
Project Time Sumary by Resource w/ OBS	EX0891	Portlet	theWorX	The purpose is to show actual hours, planned effort and remaining effort at the resource level, with the addition of OBS levels to support filtering and manipulation of the exported data.
Project Time Summary - Power BI	EX1570	Report	theWorX	Project Time Summary report provides view of Allocation hours, EAC hours, ETC hours and Actual hours for Projects. User can further narrow their search by OBS Type & Path and Project Manager.
Project Time Summary (JS report)	EX1446	Report	theWorX	Project Time Summary report provides the project manager a single place to view Actual hours, Allocation hours, ETC hours and EAC hours for all filtered projects. It also displays Project ID, Project Name and Project Manager. User can further narrow their search by OBS Type & Path, Project Name, Project ID, Project Manager, Task Name, Project Status, Project Stage, Project Role, Is Active? and Is Template?.
Project Variance - Power BI	EX1571	Report	theWorX	Project Variance report provides project managers a single place to view all their active projects, open tasks, Task EAC hours, Task Baseline hours and their variance. Project Managers can use this report to view and manage their projects progress against their baselines. They can easily detect the projects that are running behind and pinpoint the tasks that are causing the variance in the schedule. You can further narrow your search by OBS Type, OBS Path and Project.

Name	ID	Work Type	Location	Long Description
Project Variances	EX0095	Portlet	theWorX	This Project Variances portlet provides a project manager a consolidated view of all of their active projects and open project tasks, and shows them the baseline variance for the task EACs and the task start and finish dates. This gives the project manager a single place to view and manage how their projects are progressing against their baselines. The PM can easily detect when projects are running behind and pinpoint, which tasks are causing the variance in the schedule.
Project Variances - JS Report	EX1644	Report	theWorX	Project Variances is a grid chart that provides project managers a single place to view baseline variance at task level for various projects. This report helps managers analyze how projects are progressing against their baselines and helps them in taking correcting measures if required. You can further narrow your search by OBS Type, OBS Path, Project ID, Task Finish Date, Task Total EAC to Baseline Hours variance, Task Total EAC to Baseline Hours variance%, Task Total Baseline Hours, Task Total EAC Hours and Is Project Active?
Project/Financial Management | Overview - RegoU 2016	EX1182	Presentation	theBasiX	Do you want to see and understand the out of the box project/financial management functionality in Clarity PPM. In this class, we will review project/financial management within Clarity PPM.
Project/Financial Management | Round Table - RegoU 2016	EX1183	Presentation	theBasiX	Do you want to understand what other companies are doing well or struggling with related to project/financial management? In this facilitated round table, we will discuss key questions and use cases.
Projects and Task Hierarchy	EX1210	Portlet	theWorX	Grid Portlet displays project and task data--including name, dates, status, effort, %Complete, and schedule. Portlet initially displays project data. But there is a + sign toggle, which, when clicked, reveals task data, and the toggle becomes a – sign. User can choose to Automatically Expand all levels from Options Icon>Configure>List Column Section>Options. Portlet supports up to 10 levels of WBS. Portlet filterable by project name and ID, OBS structure, manager name, active/inactive, and open for time entry.
Projects by Business Sponsor	EX1413	Portlet	theBasiX	Horizontal Bar Graph displays total number of projects for each Business Owner/Sponsor for a selected Project Parent Stage (only Project Investments included). Vertical Axis displays Business Owner name. Horizontal Axis displays number of projects. Filter selectable for any Project Parent Stage. Color coding of bar and legend are synchronized to detail stage under the parent. Total for each detail stage displays on each segment of the bar. A mouseover displays a percent of total for each detail stage.
Projects by Schedule Currency - Pie Only	EX1081	Portlet	theBasiX	Pie Chart Portlet displays counts of active projects with various Stale ratings. Calculation is Percent Stale Tasks = number of open (not completed) tasks with a finish date over 15 days old, divided by total open tasks. Filterable by OBS structure and project manager. Data label = project count. Mouse-over and Legend labels = stale rating. More than 90% Stale means 90 to 100% of open tasks on a project have finish dates older than 15 days. More than 80% Stale means 80 to 89% of open tasks on a project have finish dates older than 15 days. Less than 70% Stale means fewer than 70% of open tasks on a project have finish dates older than 15 days.
Projects by Schedule Currency - Pie w/ Drilldown	EX1082	Portlet	theWorX	Pie Chart Portlet displays counts of active projects with various Stale ratings. Calculation is Percent Stale Tasks = number of open (not completed) tasks with a finish date over 15 days old, divided by total open tasks. Filterable by OBS structure and project manager. Data label = project count. Mouseover and Legend labels = stale rating. More than 90% Stale means 90 to 100% of open tasks on a project have finish dates older than 15 days. More than 80% Stale means 80 to 89% of open tasks on a project have finish dates older than 15 days. Less than 70% Stale means fewer than 70% of open tasks on a project have finish dates older than 15 days. By clicking on pie slice, a drilldown grid portlet appears with listing of projects and their Stale Ratings.
Projects by Stage and Manager	EX0097	Portlet	theBasiX	The Projects by Stage and Manager portlet displays all active projects (excluding programs), with a project stage and project manager. The portlet color codes the different stages and counts the number of projects in each stage by project manager. This portlet provides a quick snapshot of all projects with stage details so the PMO may get an overview of where certain projects are sitting with each Project Manager.
Projects by Stage and Manager (JS Report)	EX1443	Report	theWorX	Projects by Stage and Manager report is a stacked bar chart that displays percentage of projects associated with project manager at a particular stage. Legend displays colors used to represent various Project Stages. This report provides to PMO a quick snapshot of where certain projects are sitting with each Project Manager. You can further narrow your search by Project Manager, Project Name, Is Project Active? , Is Template? And Is Program?

Name	ID	Work Type	Location	Long Description
Projects by Stage and Manager w Drilldown	EX1072	Portlet	theWorX	Horizontal Bar Chart displays one bar per manager (manager name on vertical axis). Horizontal axis shows project count. Filtered by Parent Stage. Each bar shows color coded stages, where length of each color is proportional to the count. Data label = count by stage. Mouse-over = stage name and percent count of total projects. Legend = child stage names. Drilldown functionality: Clicking on a bar color yields a project grid portlet with projects in that stage for that manager.
Projects by Status Indicator - Pie	EX1071	Portlet	theBasiX	Pie Chart displays counts of all projects by out-of-box Status Indicator attributes. Filterable by OBS structure and Manager. Data label displays count. Mouse-over and Legend display Indicator name. Chart also displays count for projects with no Indicator.
Projects by Status Indicator - Pie (JS Report)	EX1456	Report	theWorX	Projects by Status Indicator is a pie chart that displays count of projects by out of box Status Indicator attribute. Legend displays the colors associated with various Status Indicator values. Mouse over the pie chart slice displays the count of projects associated with that respective Status Indicator value. You can further narrow your search by OBS Path, Project Manager and Is Project Active?.
Projects by Status Indicator - Pie w/ Drilldown	EX1070	Portlet	theWorX	Pie Chart displays counts of all projects by out-of-box Status Indicator attribute. Filterable by OBS structure and Manager. Data label displays count. Mouse-over and Legend display Indicator name. Chart also displays count for projects with no Indicator. By clicking on a pie slice, a grid portlet appears displaying all projects with that indicator value.
Projects Marked for Deletion	EX0098	Portlet	theWorX	The Projects Marked for Deletion portlet displays information about projects that are currently pending deletion, but excludes templates and programs. This portlet provides an easy way to view all projects that are marked for deletion before the background job actually erases them. The portlet provide all necessary information as well as the project manager in case there are questions about why the project was marked for deletion.
Projects That Should be Closed	EX0100	Workflow Job	theWorX	The Projects That Should be Closed process checks displays four common criteria that closed projects usually have and displays active projects that meet these criteria in a portlet. This is especially useful for project data cleanup. This portlet will identify projects that it thinks should be closed based on: ~ Time Tracking ~ No Updates ~ Created date ~ No Issues or Risks All of the dates may be altered in the filter to allow show the projects that meet your specific criteria. For example, you may want a cut-off of 30 days without time entry, 30 days without task updates, 180 days since creation, and 30 days without Risks or Issues.
Projects vs Programs vs Portfolios QRC	EX1263	Training Document	theBasiX	A Quick Reference Card to help with the definition and differences between Projects, Programs and Portfolios in Clarity PPM.
Projects With Baseline Effort (JS Report)	EX1463	Report	theWorX	Projects within baseline effort report is a pie chart that displays projects baseline effort by their categories. Legend displays various baseline effort categories: Within Baseline, Out of Baseline, Within 10% Baseline and No Baseline. Mouse over on the pie chart displays the total number of projects within that particular category. You can further narrow your search by OBS Type & Path and Is Project Active?.
Projects Within Baseline Effort	EX0101	Portlet	theWorX	The Projects Within Baseline Effort portlet will display all projects' baseline effort in a pie chart by three different categories: Out of Baseline, Within Baseline, and Within 10% of Baseline. This portlet is used by the PMO to provide management with a snapshot of all projects and their baselines.
Projects Within Baseline Finish	EX0102	Portlet	theBasiX	The Projects Within Baseline Finish portlet displays all projects that have a baseline and presents them in a pie chart. This portlet provides management with a way to quickly view the amount of projects that are on time. The user may filter by OBS and finish date.
Projects within Baseline Finish (JS Report)	EX1455	Report	theWorX	Projects within baseline finish report is a pie chart that displays projects that have a baseline or do not have a baseline. Projects with baseline are further segregated into within or outside baseline finish. Mouse over on the pie chart displays the % of projects within a particular category. You can further narrow your search by OBS Type & Path, Project Finish Date and Is Project Active?.
Projects within Baseline Finish w/ Drilldown	EX1090	Portlet	theWorX	Pie Chart displays projects by Baseline Finish Variance—is current project finish beyond baseline finish; or is current project finish on or before baseline finish. Filterable by OBS structure and Finish Date range. Data labels show percent within baseline vs percent outside baseline. Mouse-over shows Within or Outside label and percent of total projects. Legend shows color coded Within Baseline and Outside Baseline labels. Drilldown: Clicking on a pie slice yields a grid portlet of projects either Within or Outside Baseline. See screenshot 2 for grid portlet.

Name	ID	Work Type	Location	Long Description
Proposed Estimates vs Task Estimates	EX0895	Portlet	theWorX	The Proposed Estimates vs. Task Estimates portlet gives the ability to identify when the Proposed Estimates for any given task exceed the Task Estimates. The portlet filters by investment name, investment ID, project OBS unit, investment active (yes/no/all), investment manager, resource name, resource ID, resource OBS unit, resource active (yes/no/all), and resource manager. Additionally, the results can be filtered by the proposed ETC greater than task ETC flag (yes/no/all). The information provided on the portlet includes the investment name, investment ID, investment active (yes/no), investment start/end dates, task name, resource name, resource active (yes/no), resource manager, total hours, total ETC, proposed ETC greater than task ETC flag (yes/no), pending actual hours, and proposed ETC hours.
Purge Notifications from Clarity PPM	EX1422	Technical Trick	theWorX	Over time notifications can build up in the Clarity PPM system and should be purged, so as not to hinder performance. The SQL statements mentioned in the tech doc can be implemented within a process in Clarity PPM to either purge notifications on an ongoing basis or remove all of them at once.
Quick Create Buttons	EX0676	Portlet	theWorX	An HTML portlet that displays two buttons that link the user instantly to an object create page. The portlet comes with two buttons and the buttons can be modified to link to any creation page. Administrator can choose: Project, Idea, Application, Program, etc.
Rapid System Response: RegoU February 2014	EX0878	Presentation	theBasiX	RegoU Presentation from February 2014. Reports and portlets are an excellent way to communicate information to Clarity PPM users, but you have to make sure they render information quickly. Rapid system response is one of the keys to end-user engagement and adoption. Queries are often created to optimize function over speed. This can affect overall system performance and hurt the user experience. In this session, you will learn some query tricks that Rego developers have used over the years to create high-performing reports and portlets.
Re-Baseline via Change Request	EX0029	Workflow Job	theWorX	The Re-Baseline via Change Request process is a simple method for a member of the project (who has the ability to create change requests) to request a re-baseline of the project without the project manager having to perform it. First, the user must create the change request. The user must then start the process within the change request by using the Processes tab. Once started, the process will route an action item to the Project Manager. If rejected, the process will end and the user must start it again (if needed). If approved, the process will then baseline the project and close out the change request.
Read / Process an Attachment Flat File from a Process | Lab - RegoU	EX1529	Presentation	theBasiX	Have you ever thought a data uploading tool would be helpful? This session will be a hands-on lab to build a data uploading process that will pull data from an object attachment field and upload that data into a Clarity PPM object.
Read/Process an Attachement Flat File from a Process | Lab	EX1383	Presentation	theBasix	Course description: “Have you ever thought a data uploading tool would be helpful? This session will be a hands-on lab to build a data uploading process that will pull data from an object attachment field and upload that data into a Clarity PPM object.” Download file is presentation slide deck.
Realized Benefit by Business Unit	EX1689	Portlet	theWorX	Pie Chart that aggregates Realized Benefit (Total Actual Benefit) by OBS for active projects. Only a Benefit Plan associated with the Cost Plan of Record will return data. The filter allows you to select which OBS filter you prefer to use for this pie chart, however, only an OBS associated with Projects will return data.
Realized Benefit by Location - BT	EX1078	Portlet	theBasiX	Part of the Business Transformation collection, this pie chart portlet displays realized benefit, grouped by location of project. This provides the PM with a holistic view of benefits realized across the geographical locations.
Realized Benefits by Objective	EX1687	Portlet	theWorX	This portlet displays a Pie Chart of a Portfolio’s Realized Benefits partitioned into pie slices by the portfolio’s Investments’ Objectives. Clicking on any pie slice (Objective) drills-down into a portlet that lists the Investments that make up that slice.
Realized vs Planned Over time - BT	EX1077	Portlet	theBasiX	Part of the Business Transformation collection, this line chart portlet displays realized vs planned benefits overtime, for portfolio investments. This provides the PfM with a holistic view of benefits planned vs realized over a period of time.
Rego Base Training - Advanced CA Productivity Accelerator - 2016	EX1288	Training Document	theBasiX	A Rego Base Training Course covering the advanced elements of CAPA. Elements include How to Record Content, the Topic Editor, Previewing a Topic, Publishing Content, Launching the Standalone Player, and Using the Player for the End User.

Name	ID	Work Type	Location	Long Description
Rego Base Training - Advanced Clarity PPM Administration	EX1047	Training - Doc	theBasiX	Course Description: Advanced Clarity PPM Administration is an advanced course designed for individuals responsible for the non-technical functional administration of Clarity PPM. This course expands on the Introduction course with detail on Objects, Portlets, Processes and Data Administration. Learn how to use XML Open Gateway (XOG) including installation, export/importing data, common errors and best practices. Learn OBS best practices and understand how to implement and manage the Security Model. This course also includes information on using and setting up Clarity PPM Financials, including best practices, the Rate Matrix, Cost Plans and more.
Rego Base Training - Advanced Data Model Training	EX1056	Training - Doc	theBasiX	Advanced Data Model: Building Queries describes the Clarity PPM Data Model with a focus on setting up tables and building advanced queries. This course will give you an overview of the Data Model including the Core, Time Slice and DataMart Tables. Learn about common columns, naming conventions and Object types and details. Learn details of the basic reporting tables and associated Project, Resource, OBS, Security, Timesheet and Time Slice tables.
Rego Base Training - Advanced Jaspersoft Development - 2016	EX1291	Training Document	theWorX	A Rego Base Training Course that reviews the advanced elements of Jaspersoft development. Elements include CA Data Warehouse Overview, Jaspersoft Studio, Copying an Out of the Box Report, Secondary Data Sets, Using Domain as the Data Source, Cross Tabs, Mobile, and Tips & Tricks.
Rego Base Training - Crystal Reports Development	EX1057	Training - Doc	theBasiX	Crystal Reports Development teaches how to use Crystal Reports to create powerful and engaging reports and data views. This course gives you an overview of Crystal Reports, when to use them and provides samples. You will get started using Crystal Reports learning to prepare the work environment, a sample query and a Hands On walkthrough of creating a report. This course includes leaning how to deploy the reports and provides best practices and tips, tricks and strategies.
Rego Base Training - Introduction to CA Productivity Accelerator - 2016	EX1289	Training Document	theBasiX	A Rego Base Training Course that covers the basic elements of CA's Productivity Accelerator (CAPA). Elements include an introduction to the prerequisites and components, Getting Started, Managing the Library, and Building an Outline.
Rego Base Training - Introduction to Clarity PPM Application Administration	EX1048	Training - Doc	theBasiX	Introduction to Clarity PPM Application Administration is an introductory-level course designed for individuals responsible for the non-technical functional administration of Clarity PPM. This course gives you the knowledge needed to perform fundamental Administrative tasks. From a basic overview to setting up Resources and Roles, Projects, Security and OBS. Learn to work with various aspects of Clarity PPM Studio and Portlets. Gain an understanding of necessary Ongoing Data Management including Reports and Jobs and Time Slices and more.
Rego Base Training - Introduction to Clarity PPM Financials	EX1049	Training - Doc	theBasiX	Introduction to Clarity PPM Financials is an introductory-level course designed to describe cost and budget plans for individuals responsible for the creation and maintenance of financial data in Clarity PPM. This course begins with a review of the benefits of Financial Management, terminology and types of financial plans, and discusses the components important to the system setup. You will learn what Cost and Budget plans are and when and how to create and manage them. Learn how to interpret the calculations and understand the different views. Also covered is reporting of the financial data, financial administration guidelines and best practices.
Rego Base Training - Introduction to Clarity PPM Open Workbench	EX1050	Training - Doc	theBasiX	Introduction to Open Workbench is intended for Project Managers and PMO members who will use Open Workbench with Clarity PPM to plan, schedule, and control projects. This course provides knowledge on how to navigate Open Workbench and how to use and customize Views. Learn how to create and manage the Work Breakdown Structure and define dependency relationships. Learn about Resource planning, building project teams with resources and roles. This course also has in depth information on how to use the Autoschedule feature, and covers working with Baselines as well as how to manage and control your plan through execution.
Rego Base Training - Introduction to Jaspersoft Development - 2016	EX1290	Training Document	theWorX	A Rego Base Training Course introducing Jaspersoft. Elements include an introduction to the software, Jaspersoft Domains, Configuration Basics, Security, Jaspersoft Studio, and Advanced Concepts
Rego Base Training - Jaspersoft Ad Hoc Reporting - 2016	EX1292	Training Document	theWorX	A Rego Base Training Course that reviews the Jaspersoft Ad Hoc Reporting features. Elements include an Overview, Accessing Advanced Reporting, Running a Report, Running an Ad Hoc Report, Saving and Accessing a Saved Report, Creating a Cross Tab View, Creating a Chart, Creating a Dashboard, and Scheduling a Report.

Name	ID	Work Type	Location	Long Description
Rego Base Training - Jaspersoft Development	EX1055	Training - Doc	theBasiX	Jaspersoft Development is an advanced technical course that expands on the Using Jaspersoft with Clarity PPM and will teach you how to write reports in Clarity PPM using Jaspersoft. This in depth course will take you through installing Jaspersoft Studio, Security and creating a Jaspersoft report. Learn to create and deploy reports including sorting, grouping and dynamic headers and images. Learn how to add a logo and work with styles, formatting, input controls and parameters. An additional advanced section discusses multi-select input control, sub reports, charts, linked reports, creating and deploying scriptlets and report migration.
Rego Base Training - Managing Portfolios with Clarity PPM	EX1053	Training - Doc	theBasiX	Managing Portfolios with Clarity PPM teaches portfolio managers how to use Clarity PPM's portfolio analysis and scenario capabilities. This course will review Portfolio management concepts, terms and definitions and discuss the capabilities of Clarity PPM Portfolio Management, how to establish portfolio requirements and prepare to use portfolios. Learn how to organize portfolio properties and prioritize investments. This course covers how to define detailed planning targets for cost, resource and benefits and use the waterlines view to analyze and optimize your portfolio performance. Learn how to use the scenario planning functionality to accomplish the portfolio goal. This course also covers using the many PMO Accelerator views and portlets to evaluate and compare alternate portfolio plans.
Rego Base Training - Managing Projects with Clarity PPM	EX1051	Training - Doc	theBasiX	Managing Projects with Clarity PPM teaches project managers who will be using Clarity PPM how to use the project planning and control capabilities of Clarity PPM. This course will review basic Project Management concepts and terminology. You will learn how to use Clarity PPM to define and create projects, work with templates, build a work breakdown structure, and build a team. This course also discusses Clarity PPM Autoschedule and other scheduling options. You will learn how to manage Baselines, create and manage Risks, Issues and Change Requests and work with Programs and Subprojects. Using the PM Portlets and reports is also covered.
Rego Base Training - Managing Resources with Clarity PPM	EX1052	Training - Doc	theBasiX	Managing Resources with Clarity PPM teaches project and resource managers how to use Clarity PPM's Resource Management module to support the resource management processes. This course will review Resource Management concepts and definitions and discusses essential roles and responsibilities present in many organizations. You will learn about the Resource Profile, manage details of the resource including availability, calendars and skill sets. Learn how to manage your resources allocations to projects and quickly determine over allocation and under allocation. Learn to work with generic roles to aid in planning and use the Resource Finder function to replace the role once the appropriate resource is identified. This course also covers how to manage and balance resources and includes best practices. Learn how to use the many views and portlets to manage the Resource Planning process.
Rego Base Training - Using Jaspersoft with Clarity PPM	EX1054	Training - Doc	theBasiX	Using Jaspersoft with Clarity PPM is intended for functional users who want to take maximum advantage of writing reports in Clarity PPM using Jaspersoft Ad Hoc Reporting. The course begins with an overview of reporting strategies, the Jaspersoft suite, how it works with Clarity PPM and migrating current reports. Learn how to view existing reports, create ad-hoc views and reports and dashboards.
Rego Base Training - Using MSP with Clarity PPM - 2016	EX1293	Training Document	theBasiX	A handbook used in the Rego Base Training Course on Using MSP with Clarity PPM. Elements include Overview and Setup, Getting Started, Tasks, Resources, Controlling a Project, and Advanced Topics.
Rego Bi-Modal PPM Webinar - regoU Webinar Series	EX1320	Presentation	theBasiX	Agile. Waterfall. Bimodal. Really? Yes—Agile and Waterfall can co-exist and provide significant value to an organization when done properly. Join Rob Greca, Agile Guru, at Rego Consulting for a Bimodal PPM webinar (previously recorded). During this webinar, Rob will discuss important factors to consider when undertaking a bimodal approach, including * Financials * Metrics * Resources * Investment Hierarchy * and Tooling. Download is a .pdf of the presentation deck. See link to register to view the webinar. http://event.on24.com/wcc/r/1342828/88AB752417176F234ACABF5EF57014F7
Rego Innovation - Clarity MSP Integration	EX1671	Presentation	theBasix	A Single Page explainer document that shares information on Rego's Clarity MSP Connector.

Name	ID	Work Type	Location	Long Description
Rego Innovation p Action Item Responder	EX1672	Presentation	theBasix	The Populate Timesheets process converts task level ETC into time entered on the timesheet. The process relies on the resource “opting in” to the process by checking a new attribute called “Auto Populate Timesheet?”, as well as the project manager “opting in” at the project level via a new attribute called “Auto Populate Timesheet?” Once the resource opts in and the PM opts in, the process will create a timesheet for the resource, pulling in the ETCs for the tasks that week and moving them to the actual hours. Once the process runs, an email will be sent to the resource letting them know the hours have been applied.
Rego Task Uploader	EX1045	Configuration Mod	theWorX	Take your project task information straight from Excel right into Clarity PPM. Task Name, Start Date, Finish Date and Percent Complete can all be imported or updated directly. Other fields can be added with a short Rego Consulting engagement. Installation of the base app requires 10 hours of Rego Consulting engagement time. For more information see this YouTube video - https://youtu.be/MjQWhD7RFjA
regoLink - Your Clarity PPM Integrations - Webinar	EX1597	Presentation	theBasiX	Having the right integrations will improve the value of your PPM platform, improve efficiency, and bring greater reliability. regoLink specializes in delivering world-class integrations and service packages for PPM administrators who want to prioritize adoption, business transformation, and performance on a single system of record. Josh Leone, Chief Technology Officer at Rego Consulting, will review Rego's pre-built integrations, how they can enhance your applications and answer questions.
regoLink and RegoXchange | Offering Review - RegoU 2018	EX1530	Presentation	theBasiX	Have you looked in the regoXchange or reviewed Rego’s innovation offerings? This class will show you the power of Rego’s pre-built content library, integrations, and other assets. See example after example of portlets, processes, and materials you can use to add value to your instance of Clarity PPM. Learn how you can introduce email-based approvals with Rego's action item responder. Get a peek at Rego's new MSP integration that avoids the issues faced with the OOTB integration. Finally, understand Rego's pre-built connectors and how they can benefit your instance.
regoXchange | Governance Content Review - RegoU 2016	EX1184	Presentation	theBasiX	Have you looked in the regoXchange lately? This class will show you the power of Rego’s proprietary solutions library. See pre-built portlets, processes, and materials you can use to add value to your instance of Clarity PPM. Content in this session will focus more on the Functional/Governance audience's interests.
regoXchange | Technical Content Review & Performance Optimization Product - RegoU 2016	EX1185	Presentation	theBasiX	Have you looked in the regoXchange or reviewed Rego’s performance offering? This class will show you the power of Rego’s pre-built content library. See example after example of portlets, processes, and materials you can use to add value to your instance of Clarity PPM. Content in this session will appeal more to the Technical audience's interest. This class will also review Rego’s new performance optimization offering, designed to provide real analytics and benchmarking for your system performance.
RegoXchange Content Review | Governance	EX1384	Presentation	theBasix	Have you looked in the regoXchange lately? This class will show you the power of Rego’s proprietary solutions library in the Governance/Functional area. See pre-built portlets, processes, and materials you can use to add value to your instance of Clarity PPM. Download file is the presentation slide deck.
RegoXchange Content Review | Technical	EX1385	Presentation	theBasix	Have you looked in the regoXchange or reviewed Rego’s performance offering? This class will show you the power of Rego’s pre-built content library in the Technical area. See example after example of portlets, processes, and materials you can use to add value to your instance of Clarity PPM. This class will also review Rego’s new performance optimization offering, designed to provide real analytics and benchmarking for your system performance.
RegoXchange Moving Forward: RegoU February 2014	EX0819	Presentation	theBasiX	RegoU Presentation from February 2014. The days of static content regarding Clarity PPM training are nearing an end. RegoXchange is a robust training site dedicated to providing engaging training to Clarity PPM users. We are constantly adding new training to the site on various topics and would like to hear your input. Is there a Clarity PPM topic that you would like to see covered?
RegoXchange Quick Reference Guide	EX0953	Training - Doc	theBasiX	Overview of the registration process and tips for using the regoXchange, Rego Consulting’s content library for Clarity PPM portlets, training materials, workflows, and other content tools.
RegoXchange: Content Solutions for Real-World Challenges	EX0813	Presentation	theBasiX	A PowerPoint presentation used in the RegoXchange Webinar of Feb. 7, 2014. In this webinar, Jen Scarlato, a Rego Consulting Functional Consultant, discussed how she has used content in the RegoXchange to solve challenges a Insurance Company client came across while implementing Clarity PPM in their organization. This document is the PowerPoint presentation that was used in that discussion.

Name	ID	Work Type	Location	Long Description
RegoXchange: Content Solutions for Real-world Challenges: Dashboards	EX0926	Presentation	theBasiX	The presentation starts with a quick overview of the capabilities and content of RegoXchange. Afterwards, Jen Scarlato & Atul Kunkulol, members of Rego's team of Clarity PPM experts, will discuss how RegoXchange is utilized to automate processes through Workflows. This is only the powerpoint presentation, not a recording of the webinar.
RegoXchange: Content Solutions for Real-world Challenges: Workflows	EX0887	Presentation	theBasiX	The presentation starts with a quick overview of the capabilities and content of RegoXchange. Afterwards, Jen Scarlato & Atul Kunkulol, members of Rego's team of Clarity PPM experts, will discuss how RegoXchange is utilized to automate processes through Workflows. This is only the powerpoint presentation, not a recording of the webinar.
Remove Group Assignments	EX1421	Workflow	theWorX	A process that removes all the group assignments for inactive users after execution of process. The following are removed for all inactive users: - Group assignments - Instance rights - Global rights Note: It will not remove the instance rights which are generated automatically (like Project – Manager (Auto), Resource Manager(Auto) etc).
Remove Participants	EX1562	Workflow	theWorX	This can be used to remove all participants and their corresponding security permissions. NOTE: The ability to remove the right is with the admin only.
Remove PM Auto Permissions	EX1561	Workflow	theWorX	This can be used to remove all automatic permissions (Project Manager Auto) granted to users as a result of becoming a project manager. NOTE: The ability to remove the right is with the admin only.
Remove RM Auto Permissions	EX1560	Workflow	theWorX	This can be used to remove all automatic permissions (Resource Manager Auto) granted to users as a result of becoming a resource manager. NOTE: The ability to remove the right is with the admin only
Removing Buttons	EX0802	Technical Trick	theBasiX	This Tech Trick provides step-by-step instructions for removing standard buttons from the screen. This action is desirable when a custom process negates the need for having a button (in the example below the Submit for Approval button is no longer necessary, since an approval process runs triggered by saving the object). It is also sometimes optimal not to display the Delete button on screens.
Reporting | Strategies	EX1386	Presentation	theBasiX	Course description: “Are you overwhelmed by all the new reporting changes and options? This class will explore the various reporting tools available in Clarity PPM and help you understand the best way to output your data. We will provide use cases and examples to assist you in developing a reporting strategy for your organization.” Download file is the presentation slide deck.
Reporting | Strategies - RegoU 2016	EX1186	Presentation	theBasiX	Are you overwhelmed by all the new reporting changes and options? This class will explore the various reporting tools available in Clarity PPM and help you understand the best way to output your data. We will provide use cases and examples to assist you in developing a reporting strategy for your organization.
Reporting | Strategies - RegoU 2018	EX1531	Presentation	theBasiX	Are you overwhelmed by all the new reporting changes and options? This class will explore the various reporting tools available in Clarity PPM and help you understand the best way to output your data. We will provide use cases and examples to assist you in developing a reporting strategy for your organization.
Reporting Strategies	EX0430	Presentation	theBasiX	A PowerPoint presentation reviewing the strengths and weaknesses of different report formats. Presentation reviews Portlets, Crystal Reports, WEBI Reports, Xcelsius Dashboards and External Reporting Tools.
Reports Run	EX0103	Portlet	theWorX	The Reports Run portlet generates a list of reports that have been run during the selected timeframe. The date range is provided via the filter. The portlet will help administrators find reports that are not frequently used to target them for removal. The portlet will tell the user the number of times the report has been run, the report name and ID, and the last ran date.
Reset Admin Password	EX0260	Technical Trick	theBasiX	The Reset Admin Password technical trick provides the queries necessary to reset the administrator's password via the database. Passwords are forgotten, overwritten and misplaced often; using this technical trick, the support team will always have a back-up plan to gaining back access to the system.
Resource Allocation by Percent	EX1075	Portlet	theWorX	This portlet shows resource allocation by percent and hours, and gives ability to filter on allocation percent. The RM can use the portlet to see if any of the resources is over/ under allocated.

Name	ID	Work Type	Location	Long Description
Resource Availability - 4 Weeks	EX1095	Portlet	theWorX	Resource Availability – 4 Weeks is a grid portlet that displays all resources with their total allocated hours by week, and an average availability percent (4 Wk Avail %) for next four weeks. If % Available is negative, this indicates an over-allocation. Zero% Average Availability indicates fully allocated (no remaining availability). Filterable by Role, Resource, Resource Type, Full-Time/Part-Time, Availability Range. Contractor Type is a custom attribute (Lookup - String) created on the Resource object. It is attached to the lookup, Contractor Type (Lookup ID: REGO_CONTRACTOR_TYPE) that has static values Part Time (PT) and Full Time(FT).
Resource Availability - 4 Weeks (JS Report)	EX1429	Report	theWorX	Resource Availability – 4 Weeks displays all resources with their total allocated hours by week, and an average availability percent (4 Wk Avail %) for next four weeks. This report also displays Resource Primary Role and Employment Type. User can further narrow their search by Resource Name, Resource Type & Week Start Date. User can use exact dates or relative dates for Week Start Date filter parameters.
Resource Financial Settings	EX1563	Portlet	theWorX	Resource Financial Settings portlet provides resource managers a single place to view financial settings of various resources. It is a grid portlet that displays Resource details such as Name, Email, Manager, Employment Type, Is Active?, Is Open for Time?, Resource Class, Transaction Class and Department. You can further narrow your search by Resource(s), Active, Open for Time, Employment Type, Resource Class, Transaction class and Department.
Resource Lookup in a Group	EX0150	Technical Trick	theBasiX	The Resource Lookups in a Group technical trick provides step-by-step instructions on creating a resource lookup based on members of a particular security group. For some fields, you want to narrow the amount of resources that the resource browse window supplies. By adding the selected users to a specific security group, the administrator may only display those resources in a resource browse window on the application side.
Resource Management | Best Practices	EX1387	Presentation	theBasiX	Course description: “Do you want to know the best practices for implementing resource management? In this class, we’ll discuss reasons for using resource management and what you need to start.” Download file is the presentation slide deck.
Resource Management | Best Practices - RegoU 2018	EX1532	Presentation	theBasiX	Are you starting a resource management implementation, or do you want to compare how you are using these functions vs. others or best practices? In this class we will discuss some best practices from successful customers.
Resource Management | Implementation Best Practices - RegoU 2016	EX1189	Presentation	theBasiX	Do you want to know the best practices for implementing resource management? In this class, we’ll discuss reasons for using resource management and what you need to start.
Resource Management | OOTB Introduction - RegoU 2018	EX1533	Presentation	theBasiX	Do you want to understand the OOTB configuration and functionality of resource management? In this class, we will review the OOTB objects, views, views, and functions of assignments, allocations, and other related areas.
Resource Management | Overview - RegoU 2016	EX1187	Presentation	theBasiX	Do you want to see and understand the out of the box resource management functionality in Clarity PPM. In this class, we will review resource management within Clarity PPM.
Resource Management | Round Table	EX1388	Presentation	theBasiX	Course description: “Do you want to know the best practices for implementing resource management? In this moderated Round Table on best practices, we’ll discuss managing resources, requisitions, planning, and capacity.” Download file is the presentation slide deck.
Resource Management | Round Table - RegoU 2016	EX1188	Presentation	theBasiX	Do you want to understand what other companies are doing well or struggling with related to resource management? In this facilitated round table, we will discuss key questions and use cases.
Resource Management | Round Table - RegoU 2018	EX1534	Presentation	theBasiX	Do you want to talk to other customers that are using or plan to use resource management? In this moderated Round Table where customers can share experiences and provide insights on process, configurations, challenges, and successes. We will divide into small groups and discuss customer selected topics - 100% sharing.

Name	ID	Work Type	Location	Long Description
Resource Management Course 2016	EX1267	Training Document	theWorX	This course will provide an overview of Clarity PPM Resource Management functionality. Topics include: * Overview + What is Resource Management and Why It's Important + Resource Management Terms and Definitions + Roles and Responsibilities * Managing Resources + Accessing Resources and Creating Custom Filters + Understanding and Using the Resource Profile *Staffing Investments and Allocation + Terms and Definitions: The Four A's + Booking Statuses + Adding a Resource to the Team via Allocation Tab + Adding a Role / Resource Via Team Tab * Using Resource Finder * Using the Resource Planning Portlets * Closing
Resource Management Office | Creation and Optimization - RegoU 2018	EX1537	Presentation	theBasiX	Does your organization struggle with resource management? Have you considered creating a Resource Management Office (RMO)? This session will review how some organizations are using RMOs to drive adoption and effectively manage resources, including real world examples of RMO setup and execution.
Resource Management Overview - RegoU 2015	EX1011	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on Clarity PPM's Resource Management functionality. The agenda covers an overview of resource management, the value of resource management, challenges, and Rego Keys to Success.
Resource Manager | Best Practice – Day in the Life - RegoU 2016	EX1190	Presentation	theBasiX	This class will provide a list of daily and weekly activities that every resource manager should follow to leverage Clarity PPM more effectively.
Resource Manager | Best Practice "Day in the Life" - RegoU 2018	EX1535	Presentation	theBasiX	This class will provide a list of daily and weekly activities that every resource manager should follow to leverage Clarity PPM more effectively.
Resource Manager | Best Practice Day in the Life	EX1389	Presentation	theBasiX	This class will provide a list of daily and weekly activities that every resource manager should follow to leverage Clarity PPM more effectively. Download file is the presentation slide deck.
Resource Manager Complance - Power BI	EX1575	Report	theWorX	Resource Manager - Compliance report provides resource managers a single place to view Compliance status for various critical KPIs. All the KPIs are depicted in various visualizations. Pending Approval: Scorecard that displays the # of resources whose timesheets are not approved. Employee Type Counts: Pie chart displays the # of resources per employment type (Employee / Contractor) Task Performance: Pie chart displaying # of resources per their below performance status. Stale - Task finish date is less than today's date Critical – Task Baseline finish date is less than today's date Late – (Task Finish date – Task Baseline finish date) > 5 Early – (Task Baseline Finish date – Task finish date) > 5 On Time – (Task Baseline Finish date – Task finish date)

Name	ID	Work Type	Location	Long Description
Resource Manager Demand - Power BI	EX1576	Report	theWorX	Resource Manager – Demand report provides resource managers a single place to view demand status for a role. Open Request from Start Date: Pie chart that displays the # of open requests made for the selected role for a given duration from Allocation Start Date. Green - Open request from Start Date is greater than 2 weeks Yellow - Open request from Start Date is greater than 1 week and less than 2 weeks Red - Open request from Start Date is less than 1 week Open Request from Created Date: Pie chart that displays the # of open requests made for the selected role for a given duration from Request created date. Red - Open request from Created Date is greater than 2 weeks Yellow - Open request from Created Date is greater than 1 week and less than 2 weeks Green - Open request from Created Date is less than 1 week Alloc/ETC/Avail over time: Series of line charts that display Allocation Hours, ETC Hours and Availability hours over a period of time (6 months before and 6 months after current date) You can further narrow your search by Role.
Resource Map	EX0665	Portlet	theWorX	The Resource Map portlet is designed to display resource counts, by country, on a map of the world. Clicking one of the resource markers on the map will display the total resource count for that country. Additionally, a link is provided that connects to a grid portlet which displays all resources that reside in that country. The ability to zoom in and out on areas of the world is available. Due to the requirements outlined in the Special Installation Instructions section, this portlet requires 2-3 Rego Consulting hours to install. Further customization of the data on this map and its associated grid portlet may be requested. Please contact us for more details.
Resource Over-Allocation Notification	EX1069	Workflow Job	theWorX	The process notifies resource who has been added to investment today and allocation is greater or equal to 100%. The process is on-demand and would require the user to have appropriate rights to run the process. Process should be scheduled as daily once job.
Resource Proficiency	EX1103	Portlet	theWorX	This grid displays Skill Proficiency and Interest Level by Resource. Users can utilize this view to search for Resources by Skill, Parent Skill, Interest, Role, Parent Role, Resource and Resource OBS. This portlet grants a Project Manager or Resource Manager the ability to determine which Resources best fit the needs for their project.
Resource Profile Overview QRC	EX1272	Training Document	theBasiX	A Quick Reference Card to assist in maintaining the Resource Profiles in Clarity PPM.
Resource Rights	EX0104	Portlet	theWorX	The Resource Rights portlet displays information for all global, OBS, and instance based rights that are present in the system. This portlet can easily determine who has certain rights and what is causing them to retain a certain license status (creator, studio developer, etc).
Resource Time by Investment - Detail	EX0151	Portlet	theWorX	The Resource Time by Investment Detail portlet gives the Resource Manager the ability to search for time reported by resources against investments. The portlet provides filters for specific dates, a particular project and/or Project Manager. Using this portlet, the RM can get an overview of all data in a time period, the overall time logged to a project and the breakdown of his or her resources' hours on that project.
Resource Time by Investment - Pie	EX0152	Portlet	theWorX	The Resource Time by Investment - Pie portlet shows a graphical representation of the time spent on investments for all resources where the logged in user is selected as the resource manager. The portlet gives the Resource Manager the ability to quickly view all time reported by resources against projects. The portlet filters between specific dates using the daily actuals timeslice. The pie chart provides a graphical view as to how time is divided across projects.
Resource Vacation	EX0105	Portlet	theWorX	The Resource Vacation portlet allows a resource manager to view a resource's current annual vacation allowance, as set by the resource manager, against the resource's vacation calendar hours and actual posted timesheet hours. This portlet is useful for determining the amount of hours a resource has requested off and has remaining. This portlet also ensures the resource has accounted for all annual vacation allowance hours in the calendar and has posted time for all past calendar request hours.

Name	ID	Work Type	Location	Long Description
Resource Vacation Details	EX0106	Portlet	theWorX	The Resource Vacation Details portlet allows a resource manager, or administrator, to see a resource's calendar at a glance, displayed by week or month for a selected time period. This portlet shows the Resource Name, Resource Manager, Calendar, H (holiday), and V (vacation) hours for the select time frame.
Resources in Security Groups / Users in Groups	EX0107	Portlet	theBasiX	The Resources in Security Groups / Users in Groups portlet shows security group information for resources. (Note: the information displayed is dependent on what the user has security rights to view.) The portlet displays the Group, Group ID, if the Group is active, Resource, User Name and User Status. This portlet also includes the ability to filter on a specific group or resource, by whether the group is active, by user status or OBS.
Resources with No Basic Matrix Entry	EX1096	Portlet	theWorX	“Resources with No Basic Matrix Entry” portlet displays combinations of project and resource where the assigned resource does or does not have a rate established for that project. Portlet is filterable by Projects, Project ID, Resources, and Missing Rate (Yes, No, All). How does this work? The Rate Matrix Extraction job populates a record into the NBI_PROJ_RES_RATES_AND_COSTS table for every resource/project combination that meets any of the rate matrix criteria. This portlet checks that table, and sets the Missing Rate attribute to Yes or No.
Resources' Skills	EX0111	Portlet	theWorX	The Resources' Skills portlet displays all resources, skills, proficiencies, and interests. Using this portlet, resource managers can quickly assess all skills within the system for their resources. The portlet results may be filtered on: Skill, Resource Last Name, Interest and Proficiency.
Restricted License Count by OBS	EX0921	Portlet	theWorX	This portlet displays the resources that are using a Restricted license. The filter options include OBS as well as Resource Last Name. This portlet also displays the last date that the resource logged into Clarity PPM so that any inactive resources with a Restricted license are readily apparent. • Note: As of Clarity PPM version 13.2, Team Member license was renamed to Restricted license.
Retrieve Custom UserValues in Timesheet	EX1658	Technical Trick	theWorX	The tech-trick shows how to retrieve logged in User related values (ex: skill set) in timesheet.
Risks Issues and Change Requests QRC	EX1264	Training Document	theBasiX	A Quick Reference Card to assist in the creation of Risks, Issues and Change Requests in Clarity PPM. Information also assists in the Escalation and Downgrade of these items.
RM / PfM / TM / BM User Interface | Tips and Tricks - RegoU 2018	EX1536	Presentation	theBasiX	Do you have a question related to portfolio/financial/resource management that you have wanted to ask a Clarity PPM expert or a customer that has already implemented? In this session, a panel of experts will answer questions on best practice, lessons learned, implementation, and functionality.
RM & PM User Interface | Tips and Tricks	EX1390	Presentation	theBasiX	Course description: “Do you find Clarity PPM difficult to use? This class will explore a number of little configuration changes that an individual can make so Clarity PPM is more helpful in providing support for resource and project managers. Our goal in this session is to have you say at least 5 times, "I didn't know you could do that!"” Download file is the presentation slide deck.
RM & PM User Interface | Tips and Tricks - RegoU 2016	EX1191	Presentation	theBasiX	Do you find Clarity PPM difficult to use? This class will explore a number of little configuration changes that an individual can make to make Clarity PPM more helpful in providing support for resource and project managers. Our goal in this session is to have you say at least 5 times "I didn't know you could do that!"
RM Dashboard - Power BI	EX1669	Report	theWorX	RM Dashboard shows various KPIs like Actuals posted by the resources in last month, Allocation in current month, count of missed timesheets etc. Team Details – Grid report providing list of all the resources managed by a resource manager. Allocation by Investment type – Tree graph displaying distribution pattern of allocation hours across different investment types. Actuals by Employment Type - Area graph, displaying actual hours posted by Employees Vs Contractors. Demand by Month – Area graph, displaying Allocation Vs Availability for next 6 months. Utilization by Month - Area graph, displaying Baseline Vs Actuals hours over last 6 months.
RM Governance	EX0896	Portlet	theWorX	The RM Governance portlet provides resource availability, allocation, and comparison of the two values at 2, 4, and 8 week intervals. Allows searching on any RM or resource OBS instead of pre-filtering for the logged in user.

Name	ID	Work Type	Location	Long Description
RM Stalker - Resource Allocation by Percent	EX1115	Workflow	theWorX	Process sends an email to RM, for resources assigned, that indicates the allocation percentage for each resource for the next 6 weeks. Email has links to each resource so that allocation modifications can be made as required.
RM Stalker: Allocation Over 120%	EX0882	Workflow Job	theWorX	Based on the pre-determined schedule frequency, this job will send an email to Resource Managers that have a Resource meeting the criteria of: Average allocations are greater than 120% where Resource(s) and Project(s) are active over the next 90 days. This serves as a reminder to Resource Managers to monitor and manage allocations. The contents of the email include a message indicating the Resource Manager has at least one Resource meeting this criteria and a table indicating the Resource and that resource’s average, next 90 days allocations.
RM Stalker: Allocation Under 100%	EX0925	Workflow Job	theWorX	Based on the pre-determined schedule frequency, this job will send an email to Resource Managers that have a Resource meeting the criteria of: Average allocations are less than 100% where Resource(s) and Project(s) are active over the next two weeks. This serves as a reminder to Resource Managers to monitor and manage allocations. The contents of the email include a message indicating the Resource Manager has at least one Resource meeting this criteria and a table indicating the Resource and that resource’s average, next 90 days allocations.
RM Stalker: Resource Availability - 4 Weeks	EX1117	Portlet	theWorX	Process provides the RM with assigned resources availability percentage for the next four weeks. Grid displays all resources with their total allocated hours by week, and an average availability percent (4 Wk Avail %) for next four weeks. If % Available is negative, this indicates an over-allocation. Zero% Average Availability indicates fully allocated (no remaining availability). Links at the resource name allow for modifications by the RM.
RMO Process - Webinar	EX1601	Presentation	theBasiX	Do you ever chat with people about... - who is really working on what (at an enterprise level)? - if there's enough people to do all the work? - how hard it is to predict resource issues? If this sounds familiar, you might be wondering whose job it is to solve these problems. In this webinar, you will learn how an RMO can support the organization in managing resource capacity vs demand, the changing management tips that will ensure your OMO processes and policies actually stick, and the most important question: how to define RMO operating models, processes and reporting.
Roadmaps in the New UX - RegoU 2018	EX1538	Presentation	theBasiX	Have you heard about the new Roadmap features in 15.4? Come see what all of the hype is about.
Role Removal	EX0238	Technical Trick	theWorX	The Role Removal Technical Trick provides the information for the creation of the following tables and columns which are necessary to perform the role removal: 1. Role - mapping table 2. Tables / Columns that need to be updated with Resource ID fields 3. Tables / Columns that need to be updated with Role Code fields 4. Tables that will need to be deleted 5. PRTEAM table should be checked In many instances, having excess information stored within the database can cause poor performance or slowness when retrieving data. Administrators are always seeking out ways to clean and remove unused information. This technical trick on role removal provides the steps necessary to remove roles that would otherwise be unused and eliminating unwanted information.
Running Jasersoft Reports	EX1419	Training Video	theBasiX	This video provides a basic outline of running Jaspersoft reports. It covers accessing advanced reporting and running reports.
Save Existing Microsoft Project Files to Clarity PPM	EX0808	Training - Doc	theWorX	n some situations, an MSP file may be created prior to a project being created in Clarity PPM. Once the project does get added to Clarity PPM, you will need to save, or add, that existing MSP schedule to your Clarity PPM project. This document walks through the steps to cleanse your MSP file, and get its tasks and assignments loaded against your Clarity PPM project.
Schedule Variance Details	EX1106	Portlet	theWorX	This portlet shows the variance between the schedule finish and baseline finish for projects. The portlet also displays the schedule variance: {(Finish-Start) – (Baseline Finish-Baseline Start)}.
Scheduled Jobs Cleanup	EX0112	Workflow Job	theWorX	The Scheduled Jobs Cleanup process removes all completed job instances that have run before a date set by the administrator. The administrator may use the gel parameter to update the amount of days since each job has run. Based on that date, the workflow will eliminate all jobs that have surpassed that threshold. This workflow helps administrators maintain the job logs and queue by eliminating jobs that users have potentially forgotten to remove on their own.

Name	ID	Work Type	Location	Long Description
Security Optimization and Automation - RegoU15	EX1033	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on the best practices for security with Clarity PPM. The agenda covers security guidelines, security architecture, security implementation, and Tips and Trick.
Self Assign	EX0113	Workflow Job	theWorX	The Self Assign workflow process updates a selected resource field on an object based on someone checking a boolean field on the same object. Using this process, whomever is editing the object, will be placed in this field automatically eliminating the need for each user to come in and update the field manually. The field will run when the Boolean is ticked and the user saves the page. It is important to note that the page will need to be reloaded to see the changes reflected. This can be used as a fast way to self-assign yourself to an object - you can create a boolean field that is checked and have the process assign you to that item.
Selling the Value of PPM - RegoU 2018	EX1539	Presentation	theBasiX	Do some folks in your organization see Clarity PPM as worthless or of little value? In this class we will discuss how to increase the value perception of Clarity PPM and innovative ways to sell the value Clarity PPM provides with stakeholders and users.
Service Now | ITBM Overview	EX1391	Presentation	theBasiX	Are you getting pressure from your ServiceNow team to look at ServiceNow modules that seem to overlap with the functionality within Clarity PPM? This session will give an overview of the ServiceNow ITBM modules, including demand management, PPS, and the newly release APM.
ServiceNow & Clarity PPM | Integration Options - RegoU 2018	EX1540	Presentation	theBasiX	For clients that have both ServiceNow and Clarity PPM, passing information between the systems becomes vital for the enterprise with both ITSM, Demand, and PPM toolsets. One of the biggest areas of interaction is around Demand Management. Come and see Rego's Integration solution which flexibly allows for ServiceNow records (Incident, Problem, Idea, Enhancement, and Demands) to generate Clarity PPM Ideas or Projects.
ServiceNow PPM Demo - RegoU 2018	EX1541	Presentation	theBasiX	Has the ServiceNow team been pushing ServiceNow's PPM product within the organization? This class is a demonstration of ServiceNow's PPM product with the goal of providing information on what it does and does not do. This is not a sales presentation or a feature by feature comparison with Clarity PPM.
Set Resource Daily Availability	EX1212	Workflow	theWorX	This process must be run using the “Execute a Process” job. Job may be scheduled or run on-demand. Process pulls Availability Rate from the Availability blob for each resource, where blob is not null. Then it populates this value into a custom Daily Availability attribute (Number field with 2 decimals) on the Resource object. This field does not have to be displayed to be used for reporting. Because the OOB Availability Rate field is stored only in a blob, it is difficult to include in portlet or report output. The use of this custom attribute makes the value easily reportable.
Set Up a RMO - white paper	EX1623	Presentation	theBasiX	Resource Management - Are You Doing it Right? Companies of all shapes and sizes need to know if they have the right people working on the right things at the right time, to meet their objectives. Rego's own Grant Zemont has put together this report to help your company learn the best practices for setting up a resource management office correctly.
Setting the Baseline QRC	EX1265	Training Document	theBasiX	A Quick Reference Card to assist in setting the baseline in Clarity PPM.
Setting Up an RMO	EX1392	Presentation	theBasiX	Course description: “Does your organization struggle with resource management? Have you considered creating a Resource Management Office (RMO)? This session will review how some organizations are using RMOs to drive adoption and effectively manage resources, including real world examples of RMO setup and execution.” Download file is the presentation slide deck.
Simplifying Time Tracking	EX1393	Presentation	theBasiX	Course description: “Is there a way to simplify time tracking? Time is a function 90% of companies use. What are ways to have time be less of a burden to users? How can you minimize the negative perception? This session will discuss options within Clarity PPM or outside Clarity PPM to make time tracking less of a burden for all.” Download file is the presentation slide deck.
Smart Strategies: Application Portfolio Management - Webinar	EX1224	Presentation	theBasiX	Case studies from Gartner report significant savings for companies who leverage application portfolio management (APM). Mark Feher of Empowered Networks and Wes McCoubrie of Rego Consulting will address essential strategies for utilizing APM capabilities, including rationalization, support, risk, and governance. To view the webinar, click here – http://event.on24.com/wcc/r/1130669/3209338AA28892332D76A76132AB0A61
Smartsheet with Clarity PPM | Tips and Tricks	EX1395	Presentation	theBasiX	Course description: “Are some of your users leveraging a Smartsheet add-on for project planning, or are you looking for an alternative to OWB and MSP? Learn how this new scheduling tool is making waves and adding value for project managers working within Clarity PPM.” Download file is the presentation slidedeck.

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SQL Tuning | Tips and Tricks	EX1396	Presentation	theBasiX	Course description: “Are your reports and portlets performing well? This class will walk through specific SQL tuning tricks to make queries run faster, increase end-user satisfaction, and smooth-out system performance. This is an easy way to promote efficient future development and make a huge, positive impact on user experience.” Download file is the presentation slide deck.
SQL Tuning | Tips and Tricks - RegoU 2016	EX1193	Presentation	theBasiX	Are your reports and portlets performing well? This class will walk through specific SQL tuning tricks to make queries run faster, increase end-user satisfaction, and smooth-out system performance. This is an easy way to promote efficient future development and make a huge, positive impact on user experience.
SQL Tuning | Tips and Tricks - RegoU 2018	EX1542	Presentation	theBasiX	Are your reports and portlets performing well? This class will walk through specific SQL tuning tricks to make queries run faster, increase end-user satisfaction, and smooth-out system performance. This is an easy way to promote efficient future development and make a huge, positive impact on user experience.
Staffing Ideas QRC	EX1246	Training - Doc	theBasiX	A Quick Reference Card to assist in adding resources and roles to Ideas. Updating Allocation is also covered.
Stage Gates in Clarity PPM | Overview - RegoU 2016	EX1194	Presentation	theBasiX	Does your organization track stage gate approvals today? This class will review how Clarity PPM can be used to track and monitor project stage gates. We will review various use cases and show options for leveraging Clarity PPM for this governance and reporting.
Stage Gating	EX1397	Presentation	theBasiX	Course description: “How do companies track stage gates within Clarity PPM? This session will review some best practices for tracking, monitoring, and approving stage gates within Clarity PPM. We will discuss pros and cons of various options to help you select the best method for your company.” Download file is the presentation slide deck.
Stage Gating - RegoU 2018	EX1543	Presentation	theBasiX	How do companies track stage gates within Clarity PPM? This session will review some best practices for tracking, monitoring, and approving stage gates within Clarity PPM. We will discuss pros and cons of various options to help you select the best method for your company.
Stakeholder Management	EX1398	Presentation	theBasiX	Course description: “People are the #1 key to successful implementation, acceptance and sustaining adoption after the project is long gone. Find out some tips and tricks on how to keep those key stakeholders engaged.” Download file is the presentation slide deck.
Status Report Publish	EX0114	Workflow Job	theWorX	The Status Report Publish workflow process pushes values from the status report subobject to the parent project object. The process is started when the user ticks the "Publish" boolean field on the status report (custom field added). This workflow will update the project object with the overall status indicator, the status comment, the previous overall status, and the as of date. This eliminates the project manager having to update the fields in both the status report and the project overall.
Status Reports - New User Experience (UX)	EX1420	Training Video	theBasiX	This video shows how to access and use the new user experience. It demonstrates entering status reports, including basic functionality and how the changes made in the New UX impact classic Clarity PPM.
Staying Connected to Users	EX1399	Presentation	theBasiX	Course description: “How do you close the feedback loop with your users? This session will review some innovative ways companies are connecting with Clarity PPM users to drive constant innovation and improve perception of the process and tool.” Download file is the presentation slide deck.
Sticky Notes Portlet - WR0901	EX1060	Portlet	theWorX	The Task-At-A-Glance Notes portlet provides a view of project tasks and assignments in an easy to read format, similar to popular sticky – note applications. This portlet will display all tasks on a project, ‘pinning’ them to a dashboard. Each task will include the resources assigned to them, as well as the ETCs left for the resource, and the actuals that they have posted. Each sticky note allows you to link to the task details, as well as the resource assignment details. In addition to important assignment detail, each pin on the individual task’s note indicates if the task finishes before the baseline (green), or if it is going to finish after the baseline (red).
Successful Clarity PPM Upgrades: RegoU February 2014	EX0880	Presentation	theBasiX	RegoU Presentation from February 2014. The CA research and development team has an ambitious road map for Clarity PPM, specifically for releases of Clarity PPM versions 13.2 and 13.3. With this constant stream of new releases, we have a lot to look forward to. However, the new releases force all organizations to plan and execute upgrades. In this session, you will learn the pros and cons for various upgrade strategies, including traditional upgrade vs. a fresh start. Rego’s staff of Clarity PPM experts has successfully implemented many upgrades and will be available to answer your questions. Be prepared for the next upgrade by learning the details of the latest Clarity PPM release.

Name	ID	Work Type	Location	Long Description
Successful Implementation of Resource Management: RegoU February 2014	EX0879	Presentation	theBasiX	RegoU Presentation from February 2014. Using Clarity PPM to support resource management and capacity planning continues to be at the top of most organization’s wish list. Implementing resource management is not technically challenging, but it is difficult to deploy with any PPM tool. The reason is that resource management is more about process than tool. In this session, we will review resource management best practices and talk about how Clarity PPM can support your process. Come find out how Rego’s team has successfully implemented resource management at more than 75 organizations.
Successful Upgrades - RegoU15	EX1034	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on Clarity PPM upgrades. The agenda covers five reasons to upgrade, five reasons to wait, upgrade approaches, typical stumbling blocks, Rego keys to success, and a best practices summary.
System Performance | Tips & Tricks	EX1400	Presentation	theBasiX	Course description: “Do Clarity PPM performance issues discourage your users? This class will review the root causes behind Clarity PPM performance problems and identify steps to improve performance, including specific recommendations and real case studies.”
System Performance | Tips and Tricks - RegoU 2016	EX1196	Presentation	theBasiX	Do Clarity PPM performance issues discourage your users? This class will review the root causes behind Clarity PPM performance problems and identify steps to improve performance, including specific recommendations and real case studies.
Task Baseline Compare	EX0932	Portlet	theWorX	The Task Baseline Compare portlet displays the tasks in a specific Investment and provides the ability to compare the baseline hours for the tasks in each version of the baseline.
Task Complete ~ Update Next Person to Start	EX0981	Workflow Job	theWorX	When a task is marked as complete the process looks to any tasks that are dependent on the newly completed task. If a task is marked as “Not Started” and all of the dependency tasks are marked as complete then the process will change the task status to “Started” and email all resources that are assigned to the task that has started. The process notifies resources that a task is ready to start and saves the project manager the manual effort of updating dependent tasks. NOTE: The process relies on task dependencies and is most useful in those environments where task dependencies are managed.
TCO | Best Practices for Understanding IT Costs - Webinar	EX1588	Presentation	theBasiX	Does your organization have trouble understanding IT spending and the value being delivered? With more pressure on IT budgets than ever, many organizations are calculating TCO (total cost of ownership) for applications, services, and capabilities to explain and defend IT costs. We'll discuss a roadmap for success in providing more IT cost transparency to your organization. Join with Rego's Senior Consultants, Doug Greer and Jen Scarlato, as they discuss the path to effective TCO.
Team Member - Power BI	EX1577	Report	theWorX	Team Member report provides project managers a single place to view critical KPIs associated with a team member. All the KPIs are depicted in various visualizations. Issues: Scorecard that gives you the count of issues associated with investments on which the selected resource is a team member Demands: Scorecard that gives you the count of ideas on which the selected resource is a team member Risks: Scorecard that gives you the count of risks associated with investments on which the selected resource is a team member Assignments: Bar graph displaying the list of tasks assigned to the selected resource Timesheet Performance: Dial gauge that displays the timesheet performance percentage of selected resource. Performance percentage indicates the timesheets that are submitted on time by the selected resource. Task Performance: Pie chart displaying # of tasks associated with selected resource per their below performance status. Stale - Task finish date is less than today’s date Critical – Task Baseline finish date is less than today’s date Late – (Task Finish date – Task Baseline finish date)> 5 Early – (Task Baseline Finish date – Task finish date)> 5 On Time – (Task Baseline Finish date – Task finish date)

Name	ID	Work Type	Location	Long Description
Team Member License Count by OBS	EX0921	Portlet	theWorX	This portlet displays the resources that are using a team member license. The filter options include OBS as well as Resource Last Name. This portlet also displays the last date that the resource logged into Clarity PPM so that any inactive resources with a team member (restricted) license are readily apparent. • Note: As of Clarity PPM version 13.2, Team Member license was renamed to Restricted license.
Team Skills	EX0972	Portlet	theWorX	The Team Skills portlet displays Skill Proficiency and Interest Level by Resource. Users can utilize this view to search for Resources by Skill, Parent Skill, Interest, Role, Parent Role, Resource and Resource OBS. This portlet grants a Project Manager or Resource Manager the ability to determine which Resources best fit the needs for their project.
Technical Round Table | Q&A - RegoU 2016	EX1197	Presentation	theBasiX	Could you use advice on specific, advanced technical issues? Participate in this moderated roundtable discussion on complex technical issues and how to solve them.
Time Approval QRC	EX1278	Training Document	theBasiX	A Quick Reference Card to assist in the Time Approval process in Clarity PPM.
Time by Assignment	EX0115	Portlet	theWorX	The Time by Assignment portlet displays time logged to assignments for all investments the logged in user has security rights to view - pulling data from the timeslices. It is capable of displaying the data by weekly, monthly or quarterly segments. The portlet may also be filtered by investment and resource OBS.
Time by Assignment (JS Report)	EX1430	Report	theWorX	Time by Assignment report displays time logged to assignments and its associated actuals on monthly basis for all filtered investments. It also displays total ETC and Actual hours associated with an assignment. User can further narrow their search by OBS Type & Path, Investment Type, Investment Charge Code, Investment Name, Task Name, Resource Name, Assignment Start Date and Assignment Finish Date. User can use exact dates or relative dates for Assignment Start and Finish Dates filter parameters.
Time by Investment	EX0116	Portlet	theBasiX	The Time by Investment portlet displays time logged to investments for all investments the logged in user has security rights to view - pulling data from the timeslices. It is capable of displaying the data by weekly, monthly or quarterly segments. The portlet may also be filtered by investment and resource OBS.
Time by Investment (JS Report)	EX1450	Report	theWorX	Time by Investment report displays time spent by resources on investment(s). User can view only the investments that he has access to view. Information can be drilled to Yearly, Quarterly or Monthly level. User can further narrow their search by OBS Type & Path, Investment Name, Month Start Date and Is Project Active?.
Time by Resource	EX0117	Portlet	theBasiX	The Time by Resource portlet displays time logged to projects by resource. It is capable of displaying the data by weekly, monthly or quarterly segments. The portlet may also be filtered by investment name, resource name, or resource OBS.
Time by Resource - JS Report	EX1645	Report	theWorX	Time by resource is a grid report that provides resource and project managers a single place to view time logged to projects by resource over a period of time. This report provides information such as Investment ID, Investment Name, Resource Name and Time Logged Hours on period basis. Report provides you the flexibility of changing period type to Year, Quarter, Month and Day. You can further narrow your search by OBS Type & Path, Resource Name, Investment Name, Period Start Date and Is Investment Active?
Time by Resource and Investment	EX0118	Portlet	theWorX	Time By Resource and Investment can be used to get a snapshot of investments and the time that has been put against them at the individual resource level. This portlet is good for determining what resources have put time against specific investments and can be used to see where resources are spending their time or to help rationalize ETC's for remaining work for planning purposes.
Time by Stage and Timescale - Graph	EX0213	Portlet	theWorX	The Time by Stage and Timescale - Graph portlet displays a graphical representation of hours for all tasks, by stage, for a user-defined time period on projects. The user may filter the results on: Time Scale, Resource OBS Unit, and Date Range. This portlet pulls data from the timeslices. Using this portlet, management can determine if excess time is being spent on certain task stages within projects.
Time by Stage and Timescale - Graph (JS Report)	EX1440	Report	theWorX	Time by Stage and Timescale – Graph report is a stacked column chart that displays hours for all tasks on projects by their stage for a user-defined time period. Using this report, Management can determine if excess time is being spent on a certain task stage within a project. You can further narrow your search by Month Start Date, OBS Type & Path, Is Project Active? And Is Template?.

Name	ID	Work Type	Location	Long Description
Time by Stage and Timescale - Grid	EX0206	Portlet	theBasiX	The Time by Stage and Timescale - Grid portlet displays hours for all tasks on projects by their stage for a user-defined time period. The user may narrow the results by time scale, resource OBS unit, and dates. The portlet not only provides the total hours per stage, but also the percentage of time spent on each task type. This portlet pulls data from the timeslices. Using this portlet, management can determine if excess time is being spent on a certain task stage within a project.
Time by Stage and Timescale - Grid (JS Report)	EX1439	Report	theWorX	Time by Stage and Timescale – Grid report displays hours for all tasks on projects by their stage for a user-defined time period. Information can be drilled down to Year, Quarter or Monthly level. Using this report, Management can determine if excess time is being spent on a certain task stage within a project. You can further narrow your search by Month Start Date, OBS Type & Path, Is Project Active? And Is Template?.
Time by Task	EX0119	Portlet	theWorX	The Time by Task portlet displays time logged to tasks for all investments the logged in user has security rights to view - pulling data from the timeslices. It is capable of displaying the data by weekly, monthly, quarterly or annually segments. The portlet may also be filtered by investment and resource OBS.
Time by Task (JS Report)	EX1431	Report	theWorX	Time by Task report displays monthly time logged to Tasks for all filtered investments. It also displays total Actual hours associated with a task. User can further narrow their search by OBS Type & Path, Charge Code, Project Name, Task Name, Task Charge Code, Task Status and Month End Date. User can use exact dates or relative dates for Month End Date filter parameters.
Time by Task Stage	EX0215	Portlet	theWorX	The Time by Stage portlet displays time logged to each project task stage. The portlet displays the project id, project name, task stage, and charge code for each different task stage on the project. This portlet provides management with a quick view of all project task stages by project without having to navigate into each project individually.
Time by Type - Pie	EX0154	Portlet	theBasiX	The Time By Type - Pie Chart portlet is a graphical representation of time by type of investment for all resources the logged in user has security rights to view. This portlet pulls from the daily timeslices, and can be used for determining what types of projects receive the majority of hours. The filter option allows for entry of a specific start date and finish date.
Time Entry and Approval Course 2016	EX1275	Training Document	theWorX	This course will provide an overview of Clarity PPM Time Entry and Time Approval functionality. Topics include: * Clarity PPM Timesheet Overview * Accessing and Creating Timesheets * Entering and Submitting Time * Timesheet Adjustments * Approving Timesheets
Time Entry and Approval Overview - v15.1 New UX	EX1283	Training - Video	theBasiX	This is a video presentation on the new User Experience of Clarity PPM v15.1, specific to time entry and approval. It covers: • Enabling Time Entry in the New User Experience • Entering Timesheets • Approving Timesheets • Timesheet Adjustments
Time Entry QRC	EX1279	Training Document	theBasiX	A Quick Reference Card to assist users as they enter time into Clarity PPM.
Time Off by Day	EX0205	Portlet	theWorX	The Time Off by Day portlet displays resource availability by day. The portlet results may be filtered on: Resource Manager, Booking Manager, Resource, OBS Unit, and Date Range. This portlet will display the availability for each resource by day in separate columns and obtains the information from the time slices. When the portlet encounters an exception day (personal day off, or holiday on the base calendar), a yellow caution icon will appear within the same cell. Using this portlet, resource managers are able to quickly determine availability for their resources over a set time range.
Time Tracking | Best Practices and Alternatives - RegoU 2018	EX1545	Presentation	theBasiX	Is there a way to simplify time tracking? Time is a function 90% of companies use. What are ways to have time be less of a burden to users? How can you minimize the negative perception? This session will discuss options within Clarity PPM or outside Clarity PPM to make time tracking less of a burden for all.

Name	ID	Work Type	Location	Long Description
Time Tracking Stalker (Enhanced V13) - Resource	EX0670	Workflow Job	theWorX	The Time Tracking Stalker – Resource v13 workflow process is used to notify resources who failed to submit a timesheet for the prior time period they must take action. The workflow checks for active resources (by using the hire and termination dates, their track mode and that they are open for time entry). Each resource who meet the criteria receives an email asking them to submit their outstanding timesheet(s). The email includes a table that contains this information: time period, timesheet status and any hours currently saved on the timesheet. All outstanding timesheets are included in the table. This process helps to ensure the timely submission of timesheets.
Time Tracking Stalker (Enhanced V13) Resource Manager	EX0673	Workflow Job	theWorX	The Time Tracking Stalker – RM v13 workflow process automatically sends a single email to Resource Managers which contains a list of any of their resources that have not submitted their timesheet for a prior open time period. The email informs the RM if their resources are submitting their timesheets on time. The email includes a table the provides this information for each resource: Resource Name, Time Period, Timesheet Status and Total Hours saved on the timesheet. These notifications will help to ensure that time is being posted and approved in a timely manner.
Time Tracking Stalker (Simple) - Resource	EX0120	Workflow Job	theBasiX	The Time Tracking Stalker - Resource workflow process is used to notify resources that fail to submit a timesheet in a prior week. The workflow checks for active resources, hire/termination dates, track mode, and open for time entry. This process helps to ensure resources submit timesheets in a timely manner. In version 13, the email can be enhanced to include colors, bold, underline, and other HTML formatting.
Time Tracking Stalker (Simple) - Resource Manager	EX0121	Workflow Job	theWorX	The Time Tracking Stalker - RM workflow process automatically sends an email to Resource Managers for each one of their resources that have not submitted their timesheet for a prior open time period, thus informing the RM if their resources are submitting their timesheets on time. Project Managers will also benefit since the notifications will help to ensure that time is being posted against their projects in a timely manner, helping to provide them with an accurate view of time expended on the projects.
Timesheet Adjustments in Clarity Modern UX - QRC	EX1678	Training Document	theBasix	This details how to adjust your time once the timesheet has posted: • By creating an adjustment timesheet, you are creating a copy of the original timesheet. Two versions of the timesheet will then exist: the original timesheet (Adjusted) and the new, modified timesheet (Adjustment). • Adjustments are approved like regular timesheets for open time periods. • Adjustment timesheets must be submitted so they may be reviewed and approved. Users may perform their own adjustments, or their Timesheet Approver may make the adjustment.
Timesheet Adjustments QRC	EX1280	Training Document	theBasiX	A Quick Reference Card to assist in adjusting Timesheets in Clarity PPM.
Timesheet Approval - Auto	EX0155	Workflow Job	theWorX	The Timesheet Approval - Auto process is an auto-start process that begins once the resource submits his or her timesheet. This process bypasses a Resource Manager approval and allows the user to post his or her timesheet. Once the timesheet is submitted, the process will lock the user's timesheet to prevent editing. The process will then select the next action based on three different factors: 1) The timesheet has less than 40 hours. 2) The timesheet has 40 or more hours. 3) The resource's availability is less than 8hrs/day. If the user has submitted a timesheet with less than 40 hours, then the process will email the user informing him/her of the issue, unlock the timesheet, and change the status to "Returned". If the user has an availability of less than 8hrs/day or the timesheet has 40 or more hours, then an action item will be sent to the user as a last step before the timesheet is approved. Once the timesheet is approved, then the script will set the status of the timesheet to "Approved" and unlock the timesheet.

Name	ID	Work Type	Location	Long Description
Timesheet Approval - PM and RM	EX0122	Workflow Job	theWorX	The Timesheet Approval - RM and PM process is an auto-start process that begins once the resource submits his or her timesheet. This process provides a checks-and-balances style to ensure that all resources entering time have entered the 40 hours. Once the timesheet is submitted, the process will lock the user's timesheet to prevent editing. The process will then select the next action based on three different factors: 1) The timesheet has less than 40 hours. 2) The timesheet has 40 or more hours. 3) The resource's availability is less than 8hrs/day. If the user has submitted a timesheet with less than 40 hours, then the process will email the user informing him/her of issue, unlocks the timesheet, and changes the status to "Returned". If the user has an availability of less than 8hrs/day or the timesheet has 40 or more hours, then an action item will be sent to the resource manager informing him/her of the timesheet. If the resource manager (RM) AND project manager (PM) approves the action item, then the process will approve the timesheet and unlock the timesheet. However, if the RM or PM selects "Return" on the action item, then the process will return the timesheet, mail the user that informing him/her that the timesheet has been returned, and unlock the timesheet.
Timesheet Approval - RM	EX0162	Workflow Job	theWorX	The Timesheet Approval - RM process is an auto-start process that begins once the resource submits his or her timesheet. This process provides a checks-and-balances style to ensure that all resources entering time have entered the 40 hours. Once the timesheet is submitted, the process will lock the user's timesheet to prevent editing. The process will then select the next action based on three different factors: 1) The timesheet has less than 40 hours. 2) The timesheet has 40 or more hours. 3) The resource's availability is less than 8hrs/day. If the user has submitted a timesheet with less than 40 hours, then the process will email the user informing him/her of issue, unlocks the timesheet, and changes the status to "Returned". If the user has an availability of less than 8hrs/day or the timesheet has 40 or more hours, then an action item will be sent to the resource manager informing him/her of the timesheet. If the resource manager (RM) approves the action item, then the process will approve the timesheet and unlock the timesheet. However, if the RM selects "Return" on the action item, then the process will return the timesheet, mail the user that informing him/her that the timesheet has been returned, and unlock the timesheet.
Timesheet Approval Status	EX1205	Portlet	theWorX	Portlet to show the stage of any Action Item triggered by Timesheet submission. Portlet allows for a period start date input, filters by Resource, Approver, Action Item Status and Timesheet Status. A link to the action item is provided for direct action by review if needed. This portlet is only for the clients who have established a process that triggers on Timesheet Status change to Submitted and to send Action Items to the person responsible for timesheet approval/validation i.e. PM for project tracking and/or RM for overall approval of the timesheet. The portlet won't display any data if there are no timesheet Action Items. Examples of such processes would be CA's OOTB Project Manager Approval or the Timesheet Approval - PM and RM process found on RegoXchange.
Timesheet Audit	EX0939	Portlet	theWorX	The Timesheet Audit portlet displays timesheet information in order to perform an audit. The only required data needed to search the portlet is start and finish date. Additionally, you may narrow the results by filtering by resource, resource ID, OBS Unit, resource manager, timesheet status, project, and task. The portlet provides reporting on the following: - Resource, Resource ID - Email Icon of Resource (So the reviewer can quickly email the Resource) - Resource is Active - Resource Open for Time - Time Period (Start and Finish Dates) - Timesheet Status - Is Adjustment (If the timesheet is adjusted) - Timesheet Modified Date - Timesheet Posted Date - Timesheet Submitted By - Timesheet Approved By - Project, Task - Proposed ETC Hours - Pending Actual Hours - Total Actual Hours - Total ETC Hours - Timesheet Hours

Name	ID	Work Type	Location	Long Description
Timesheet Compliance Dashboard - Power BI	EX1670	Report	theWorX	Timesheet compliance is a dashboard containing multiple visualizations that shows timesheet compliance data under various scenarios. Dashboard shows count of timesheets grouped by Status and total available timesheets. % Time Compliance – Gauge graph that shows percentage of completed timesheets against overall timesheets. Compliance by Resource Manager – Grid section that shows percent timesheet compliance by resource manager. Timesheet count by Employment type and Timesheet Status – Stacked column chart, each column represents Employment type and sections of the column represent count of timesheets by Status. Count of Timesheets by Months – Stacked column chart, each column represents a month and sections of the column represent count of timesheets by Status. Dashboard also const of two grid sections displaying number of Open timesheets by Organization and Vendor.
Timesheet Compliance Portlet Suite	EX0984	Portlet	theWorX	Late timesheet submission can cause project managers to report inaccurate numbers relating to the actual hours that have been spent on their project. The objects and portlets related to timesheet compliance were created in Clarity PPM to enforce timesheet submissions and approvals, help resource managers track that their resources are entering their timesheets in a timely manner, and ensure the accuracy of project actuals reporting. This Portlet Suite informs managers of which timesheets, resources, and resource managers are slowing down the process for approvals or submissions. The information is displayed in portlets on the Timesheet Compliance page. Portlets included are Timesheet Submission Compliance by RM, Timesheet Submission Compliance by OBS, Timesheet Approval Compliance by RM, and Timesheet Approval Compliance by OBS.
Timesheet Compliance Summary	EX1215	Portlet	theWorX	The Timesheet Compliance portlet displays information about resource timesheet compliance within an OBS. It offers an OBS, start date and end date filter.
Timesheet Notes QRC	EX1281	Training Document	theBasiX	A Quick Reference Card to assist users in adding notes to their timesheet entries in Clarity PPM.
Timesheet Smoothing	EX1114	Workflow	theWorX	The Timesheet Smoothing Process Workflow kicks-off when an individual timesheet is Submitted. It splits each transaction on the timesheet when total timesheet actuals exceed total weekly availability for the resource. Total weekly availability is determined by multiplying resource availability rate by the number of workdays in the week. Non-workdays include weekends, holidays, PTO, and other scheduled days off, as set on the resource calendar. If timesheet actuals <= total weekly availability, then the timesheet remains unchanged. But if timesheet actuals > total weekly availability, then the following occurs. Each timesheet transaction is reduced by a calculated percentage that will reduce the total regular hours to equal the total weekly availability. Then the remaining transaction hours are placed in a “Split” row for that task on that day, with an Input Type Code set based on a process parameter (which parameter can be set within the script action on the process). Note: If a single day has overtime hours, but the total timesheet actuals <= total weekly availability, no splitting occurs.
Timesheet Split Process - Oracle	EX1231	Workflow	theWorX	This process workflow with gel script forces billable hours on timesheet down to 40 hours, and sets overtime hours to non-billable. Timesheets with 40 or fewer hours are not touched. Process kicks off upon submission of timesheet. Steps are: • Determine if timesheet has > 40 hours. If so, proceed. • Create a SPLIT row for each timesheet row, with Input Type Code = Non-Bill. • Divide 40 by total timesheet ours. Store this value. • Multiply each timesheet cell by the stored value, and enter the result into that cell. • Take the difference (original cell value – new cell value), and enter in same cell on Split row. The end result will be 40 hours total on Billable rows, and overtime hours on Non-Billable rows.
Timesheets 01: Accessing Timesheets	EX0199	Training - Video	theBasiX	This video covers the process of accessing timesheets within Clarity PPM, both as a team member and as a Project or Resource Manager.
Timesheets 02: Adding Tasks and Entering Time	EX0200	Training - Video	theBasiX	This video covers the process of adding tasks to the timesheet using Populate and Add Task, using the timesheet notes functionality, entering timesheet data, updating ETC via the timesheet, and submitting the timesheet.

Name	ID	Work Type	Location	Long Description
Timesheets 03: Approving Time Video	EX0201	Training - Video	theBasiX	This video reviews how to return and approve Clarity PPM timesheets as a Project or Resource Manager.
Timesheets 04: Adjusting Time Video	EX0202	Training - Video	theWorX	This video reviews the process of creating Timesheet Adjustments - making changes to a timesheet after it has been posted.
Timesheets by Resource	EX1005	Portlet	theWorX	The Timesheets by Resource portlet gives the ability to highlight the time periods where resources are working overtime or working less than 25 hours a week. The filter requires timesheet Start Date and End Date to be provided. Additionally, the information can be filtered by Resource, Resource ID, OBS Unit, Employment Type, Resource Manager, Open for Time, and Active status. This portlet displays Resource, Resource ID, Active (yes/no), Employment Type, Primary Role, Resource Manager, and Timesheet Hours Flag. The flags are set with the logic • Yellow = timesheets not posted / zero hour timesheets • Green = where number of hours posted is > 25 and less than 45 • Red = where number of hours posted is < 25 or > 45 The thresholds can, of course, be modified.
Timeslice Details	EX1209	Portlet	theWorX	This allows users without admin access to see the timeslice settings and also allows the data to be exported to excel easily. Many organizations like to document their timeslice settings which is a manual process as you cannot export the timeslice page to excel. This allows them to periodically export the portlet results to excel to meet their documentation requirements.
Timeslices / Data Warehouse| Overview	EX1401	Presentation	theBasiX	Course description: “Does Clarity PPM Timeslice functionality seem like a foreign language to you? This intro to timeslices will cover an Overview of Timeslice Fundamentals, Terminology, Best Practices, Diagnostics, and the basic SQL Constructs to get you started.”
Timeslices | Overview - RegoU 2016	EX1198	Presentation	theBasiX	This intro to timeslices class will cover the an Overview of Timeslice Fundamentals, Terminology, Best Practices, Diagnostics and the basic SQL Constructs to get you started.
Tools and Techniques for Basic Administration - RegoU 2015	EX1017	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on basic administration of Clarity PPM. The agenda covers an administration overview, objects, lookups, OBS/Security, portlets, processes, and support items.
Tools and Techniques for Financial Processing - RegoU 2015	EX1018	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on the elements of Financial Processing in Clarity PPM. The agenda covers a financial process overview, enabling time reporting, enabling financials, posting timesheets, transaction entries, posting to WIP, adjustments, importing financial actuals, and job scheduling.
Total Cost of Ownership | Best Practices for TCO Costing - RegoU 2018	EX1544	Presentation	theBasiX	Do you want to report on TCO for your organization by business function, application, or service? This should be the financial management goal of every organization. This class will discuss a path and some architecture choices to make this a reality. We will highlight want some customers are doing today and share some best practices on the journey.
Training | Best Practices – Training Trends - RegoU 2016	EX1199	Presentation	theBasiX	Are you struggling to find a way to keep your training effective and efficient within major and minor releases? This class will review various training best practices and training pros and cons.
Training | Successful Implementation: Building Interactive Training Classes - RegoU 2016	EX1200	Presentation	theBasiX	Maximize the value of your training delivery by increasing end user engagement with the course content. Discuss options to optimize efficiency and help ensure users are engaged while participating in training.
Training | Successful Implementation: Successful Virtual Training Sessions - RegoU 2016	EX1201	Presentation	theBasiX	Tight budgets or disbursed teams often necessitate virtual training delivery. Discuss best practices and strategies to increase the effectiveness of your virtual courses.
Training | Successful Implementation: The Right Materials - RegoU 2016	EX1202	Presentation	theBasiX	Expand your training delivery options beyond MS Word and PowerPoint. Discuss the various training delivery mechanisms, and how to choose the right delivery method and combination of materials for the different types of courses you’ll deliver to your end users.
Transfer Primary Skill	EX0124	Workflow Job	theWorX	The Transfer Primary Skill process updates the primary skill on the team object by running the process with the execute process job. The process takes the primary skill that is on the resource object and moves it to all of that resource's team records where the primary skill on the team record is null. Utilizing these fields and process provide a quick way to determine what skill each resource is bringing to the project. This process makes the transition seamless from resource primary skill to team primary skill.
Transition to On-Demand | Review - RegoU 2016	EX1203	Presentation	theBasiX	Are you considering moving to Clarity PPM SaaS? This class will provide lessons learned while we walk you through business cases, conversion time-lines, and the advantages of both hosting strategies.

Name	ID	Work Type	Location	Long Description
Transitioning to Clarity PPM On Demand - RegoU15	EX1035	Training - Doc	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on moving to an On Demand instance. The Agenda reviews where to start, On Demand vs SaaS, Advantages, Migrating, and Running.
Trello Integration - Webinar	EX1227	Presentation	theBasiX	Managed your Clarity PPM project in a friendly card view in Trello. Great for simple Agile projects. To view the webinar, click here – http://portal.on24.com/view/channel/index.html?showId=1126885&showCode=regoconsulting&contentId=1239372
Trends in Healthcare - Webinar	EX1598	Presentation	theBasiX	The healthcare industry is rapidly changing—regulations, acquisitions, and new technologies. Keeping up with the demand can be challenging. Join PPM experts from Mayo Clinic, Trinity Health, IBC, Rego Consulting, and CA to learn how these companies have successfully used Clarity PPM to deal with change and maximize business contribution.
Turn Off Notifications for All	EX0125	Workflow Job	theWorX	The Turn off Notifications process disables all Email, SMS and Alerts notifications for all users. This process is helpful if users would not liked to receive emails from the system regarding actions items, timesheet submissions, etc. The script may be modified to include all users or all users that have been created within the last day.
Unlock Projects	EX0126	Workflow Job	theBasiX	The Unlock Projects workflow process can be run through the "Execute a Process" job. The workflow will execute a query that will automatically unlock projects that have been exported / checked out for over 2 days. This prevents any projects from remaining in the "locked" state for a long period of time, preventing time from posting to these projects.
Update Data Warehouse Fiscal Periods	EX1321	Technical Trick	theBasiX	Fiscal periods in DWH may need to be changed if we need to increase or decrease the number of periods for reporting.
Update Email IDs	EX0127	Workflow Job	theWorX	The Update Email Ids workflow sets all users' email addresses to non-working by appending a "ZZZZ" to the end of the email address. This process is used for when there are refreshes to your Development or Testing environments and do not want emails going to users. When complete, the log will display the total amount of email addresses updated. A second process is included in this workflow that will revert the email addresses to remove the "ZZZZ" added in the first workflow. In some instances, the process may be run in error, or you may want to send emails from a Development or Testing environment; using this second process you will be able to enable all emails again.
Update Portfolio Maxmium Values (v13.2)	EX0794	Technical Trick	theBasiX	Starting In version 13.2+ system defaults were included for some Portfolio settings: the system default for the maximum number of Investments that are included in a Portfolio is 250; the system default for the maximum number of Roles that are included in a Portfolio is 25; and the system default for the maximum number of Portfolio Attributes is 700. The SQL statements in this Technical Trick provide a means to update and change the system default Portfolio values to whatever quantities best suit your requirements.
Update Team & Assignment Roles with Primary Role	EX1112	Workflow	theWorX	This process updates the team and assignment roles with the primary role where they do not match. This way, the PM can push all roles to team and assignment for that project before they do a cost plan.
Updating the Resource Calendar QRC	EX1273	Training Document	theBasiX	A Quick Reference Card to assist in updating the Resource Calendar in Clarity PPM.
Upgrade Strategies	EX1402	Presentation	theBasiX	Course description: “There’s an upgrade in your future. Do you want to understand the costs, durations, and lessons learned? We’ll review existing and upcoming releases, the pros and cons of moving to various versions, and upgrade strategies, so you can prepare your budget and plan.” Download file is the presentation slide deck.
Upgrade Strategies - RegoU 2016	EX1204	Presentation	theBasiX	There’s an upgrade in your future. Do you want to understand the costs, durations, and lessons learned? We’ll review existing and upcoming releases, the pros and cons of moving to various versions, and upgrade strategies, so you can prepare your budget and plan.
Upgrades | Best Practices - RegoU 2018	EX1546	Presentation	theBasiX	There’s an upgrade in your future. Do you want to understand the costs, durations, and lessons learned? We’ll review existing and upcoming releases, the pros and cons of moving to various versions, and upgrade strategies, so you can prepare your budget and plan.
Upgrading to Clarity PPM 14.4 with Jaspersoft? - Webinar	EX1221	Presentation	theBasiX	Looking to upgrade to Clarity PPM 14.4? Learn the pros and cons of upgrading and what the latest patches bring to the table. Rego's Ramesh Rathnam and Darren Greer discuss the loss of Business Objects and strategies for moving to Jaspersoft. To view the webinar click here – http://event.on24.com/wcc/r/1219049/BC18939574CB5BAC944B60283C1E293D

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Use MS Excel to Map Data via XOG Files to Clarity PPM	EX1091	Technical Trick	theBasiX	This tech trick demonstrates how to use Microsoft Excel to map data to XOG files by using the Developer tab in Excel 2010+. Using a standard XML XOG file as provided by CA the guide and walkthrough video shows off the power of Excel and the ease in which object instance values can be directly inserted into or updated in Clarity PPM.
User Management - On Demand Portal & ODUM Utility	EX1109	Technical Trick	theBasiX	This technical trick provides instructions on how to make bulk additions or changes of user to On Demand environments. The On Demand User Management utility (ODUM) is a CA provided utility used the make these changes. The utility is available for download from the Portal home page, in the Downloads gadget. Understanding the process for adding Portal users in bulk with the ODUM utility helps you better plan and prepare for this task. The process involves several steps, including prerequisites, configuration, and user data set up.
Users Logged In	EX0128	Portlet	theBasiX	The Users Logged In portlet displays all users logged into the system. This portlet is helpful to determine the capacity during peak times, users still working before downtime, and the ability to view users logged in during the day. The portlet will display the resource, ID, OBS unit, OBS path, and when the user's session was last updated.
Using APM App Rationalization	EX1403	Presentation	theBasiX	Course description: "This session will walk through a step by step approach to doing application rationalization within your organization. The session will also review how to sell the benefits and process within your organization." Download file is the presentation slide deck.
Using Clarity PPM for Effective Program Management - RegoU 2015	EX1012	Presentation	theBasiX	A .pdf file that has the slide by slide presentation at 2015 RegoU on utilizing Clarity PPM for program management. The agenda covers the definition of program Management, how Clarity PPM supports program management, out of the box Clarity PPM functionality, and supporting program management.
Using Consistent Colors	EX0129	Technical Trick	theWorX	The Using Consistent Colors technical trick shows how management can create a uniform color pallet for all charts within the system. This trick, not only makes charts more professional when delivering to management, but also creates a uniform pattern throughout the Clarity PPM environment.
Using List Views QRC	EX1238	Training - Doc	theBasiX	A Quick Reference Card to assist in the use of list views in Clarity PPM. List Views are accessed from the Home menu.
Using Microsoft Project with Clarity PPM PPM - Handbook	EX0596	Training - Doc	theWorX	A handbook for utilizing successfully managing a schedule utilizing MSP and Clarity PPM PPM. Covers the details of schedule management using MSP in conjunction with Clarity PPM as well as tips and tricks for working with the two tools. This handbook should be utilized in conjunction with Using MSP With Clarity PPM – PowerPoint Presentation.
Using Microsoft Project with Clarity PPM PPM - PowerPoint Presentation	EX0598	Training - Doc	theWorX	A training PPT for utilizing successfully managing a schedule utilizing MSP and Clarity PPM PPM. Covers the details of schedule management using MSP in conjunction with Clarity PPM as well as tips and tricks for working with the two tools. This handbook should be utilized in conjunction with Using MSP With Clarity PPM – Handbook.
Using RegoXchange Power BI Reports - How to Update the Data Source	EX1565	Technical Trick	theBasiX	A tech trick document that assists you in update Data Source when utilizing the Power BI reports found in RegoXchange.
Using Resource Finder QRC	EX1274	Training Document	theBasiX	A Quick Reference Card to assist in the use of the Resource Finder in Clarity PPM.
Using the Clarity PPM Gantt	EX0914	Training - Video	theBasiX	This video provides detailed information on the use of the Gantt functionality included in Clarity PPM v13. It covers accessing the Gantt, creating and managing task properties and resource assignment data, baselining, autoscheduling, dependencies, and tips and tricks related to the use of the Gantt functionality. It can typically be deployed as-is to your end users, since the Gantt functionality is very similar across Clarity PPM environments.
Using the Clarity PPM Gantt - Quick Reference Guide	EX0817	Training - Doc	theBasiX	A single sheet document, front and back, that provides reminders on how to use the out of the box Clarity PPM Gantt that was made available starting in v13.0. Document covers: • Create a Task – Task Properties • Create a Task – Inline Editing • Update Task Data – Task Properties • Update Task Data – Inline Editing • Create a Dependency • Gantt Feature Review
Using the Knowledge Store QRC	EX1239	Training - Doc	theBasiX	A Quick Reference Card to assist in the use of the Knowledge Store in Clarity PPM. The Knowledge Store is a document repository. It can be used to store generic policies, procedures, and Clarity PPM training materials for the user community. Under Organization, select Knowledge Store.

Name	ID	Work Type	Location	Long Description
Using the Organizer QRC	EX1240	Training - Doc	theBasiX	A Quick Reference Card to assist in the use of Organizer in Clarity PPM. The Organizer provides quick access to your personal action items, tasks, processes, and notifications. From the Home menu, select Organizer under the Personal heading.
Using the Risk Subpage QRC	EX1266	Training Document	theBasiX	A Quick Reference Card to assist in the use of the Risk Subpage in Clarity PPM. The Risk Subpage is where Risk Ratings / Risk Factors are addressed.
Using User Defined Lookup with the Time Entry User Value 1 Field	EX1211	Technical Trick	theBasiX	When configuring the Timesheet Options, the browse window for selecting a lookup on the User Value 1 field only shows a choice of one lookup definition and that is the definition for the stock 'Time Entry User Value 1' Static Lookup. We want to develop our own user-defined dynamic query lookup for use on this field. How can we get this to work properly? Are there any special requirements or configuration considerations that should be reviewed in understanding this functionality for using a custom Time Entry User Value 1 dynamic query lookup? The use of a custom, dynamic lookup on the Timesheet Entry is available with specific requirements and special considerations for storing and displaying data for this field. It is recommended that you use the stock, 'Time Entry User Value 1' Static Lookup if possible.
View Management Rights on a Project	EX1046	Workflow Job	theWorX	When a team member is added to the Team tab of the project, this process will add Project - View Management and Resource – Hard Book instance access right to the team member's profile. This allows the team member to add their own allocations. NOTE: The process is NOT auto-start, and hence, needs to be run manually from Home > Organizer > Processes > Available
View Rate Matrix	EX1686	Portlet	theWorX	View Rate Matrix is a grid portlet that provides users a single place to view all the rates defined across multiple rate matrix without going to administration tab. Each Matrix may be defined with different columns (ex: Charge Code, Client, Department, Entity, Input type Code etc). This portlet dynamically brings only the columns associated with that rate matrix and provides the detailed information. User can view information related to one matrix at a time.
Viewing Old Timesheets	EX0258	Portlet	theWorX	The View Old Timesheets In Clarity PPM technical trick provides the steps needed to allow a user to view old timesheets, which cannot be done using out of the box Clarity PPM functionality. The document explains the steps needed to review an old timesheet in a closed period. This technical trick provides a simple workaround to a rather common task for the Clarity PPM support/user team.
Weekly PM Reminder	EX1425	Workflow	theWorX	A process that: * is a weekly email to a project manager. All of the content will be for where the person getting the email is the PM * shows aggregate data for all of their projects * sends the PM a reminder email at the end of each week showing the items that the PM needs to do. Maybe call it Weekly PM reminder. * Shows the mentioned data in sections as follows: o Past Due issues • Only active projects • Only open issues – not resolved or closed • Show project name, project ID, issue name, issue priority, target resolution date, color (only red or yellow) • Logic for Yellow = where target resolution is within the next week • Logic for Red = target resolution date is in the past • URL LINK: to that issue o Past Due Risks • Only active projects • Only open risks – not resolved or closed • Show project name, project ID, risk name, risk priority, target resolution date, color (only red or yellow) • Logic for Yellow = where target resolution is within the next week • Logic for Red = target resolution date is in the past • URL LINK: to that risk o Past Due Status Report • Only active projects • Show project name, project ID, report date, most recent overall status, color (only red or yellow) • Only 1 line per project – show even if there is no status report
What is XML Open Gateway (XOG)? - YouTube Video	EX0982	Training - Video	theBasiX	Today, the excellent Dave Matzdorf, Clarity PPM Chief Architect at Rego Consulting, gives us a basic overview of XML Open Gateway (XOG), including how to download it from Clarity PPM (formerly Clarity PPM PPM) and find execution files. https://youtu.be/vapQ5JJo-d8 - There is no Download Available, Only a YouTube viewable link.

Name	ID	Work Type	Location	Long Description
What's New in 15.x	EX1404	Presentation	theBasiX	Course description: “In version 15.1, CA released a new user interface. This session will review the new user interface and answer some questions you have like: how to use it, where the data comes from, when to use it, and how to deploy it alongside the “traditional” UI. This class will also review the latest and greatest from the 15.x releases.” Download file is the presentation slide deck.
What's New in Clarity PPM 15.5 - Webinar	EX1631	Presentation	theBasiX	Clarity PPM 15.5 became available for general use in early September. New features for this point release focus on the New UX and include: teams, channels, roadmaps, and beta investment types. To see what's been added since 15.4, join Rego senior consultants Sara Garvey and Ross Hensel for a walk through the platform.
When, Why, & How to Stay OOTB - RegoU 2018	EX1547	Presentation	theBasiX	Did you stray from OOTB? Was that the right decision? This will be a discussion on pros and cons of sticking to Clarity PPMs stock attributes, views, and general capabilities. When does it make sense to avoid custom configuration? Conversely, when does it make sense to move beyond the standard OOTB setup?
XOG HTML Client - Oracle	EX0995	Portlet	theBasiX	The portlet is a browser XOG client in the form of an HTML portlet. The purpose is to read/write data from/to Clarity PPM. To write the data, the user needs to have Project – Approve OR Project - Approve - All access right.