

The Rego Portfolio Management Base Kit








Climb higher and scale more quickly with these Portfolio Management portlets and guides.

The RegoExpress base kits are built on core best practices we've refined for over a decade. Our PPM engagements span 600+ customers and include thousands of development requests. Rego Base Kits are the fastest, most cost-effective way to implement the widest array of Project and Portfolio Management solutions. Implementing these items collectively has saved organizations thousands of dollars.


The Rego Portfolio Management Base Kit is loaded with seven Rego-developed portlets that supplement the out-of-the-box portlets, as well as two training guides. Rego's Portfolio Management Base Kit gives you expanded reporting and functionality.

What's Included:

Rego Developed Portlets

-  **Goal Analysis:** This portlet relates exclusively to Benefit costs in the Portfolio and its investments. It displays data for one or more portfolios depending on rights and filters.
-  **Planned Benefits by Goal:** A pie chart portlet that shows planned benefits across the system grouped by Goal. 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.
-  **Hierarchy List:** A portlet that displays the portfolios with hierarchy (child portfolios). The portlet displays the basic portfolio fields like manager, stakeholder, etc. Benefits Target, Capital Target, and Operating Target can also be added.
-  **Investment Cost Plan Status:** This portlet shows those investments within a portfolio that have a cost plan and those that do not.
-  **Planned Benefit by Objective:** A pie chart portlet that displays realized benefit, grouped by category for portfolio investments.
-  **Planned Benefit by Type:** A pie chart portlet that displays realized benefit, grouped by type of project for portfolio investments.
-  **Portfolio Health Aggregate:** A single process workflow that populates the three Portfolio Health Factors, from the Metrics page, by aggregating the portfolio investment factors of the most recent Final Project Status Report's instances to derive Overall Portfolio Health.

Training Guides

 **Portfolio Introduction:** This training document provides new users an overview of Portfolio Management, including how to score, evaluate, and prioritize investments and apply resource capacity planning scenarios.

 **Implementation Best Practices:** This popular regoUniversity deck provides insight into how to use Portfolio Management in CA PPM, including resources and financial management, scenarios, viewing capacity impacts, best practices for portfolio organizations, and setting-up effective targets.

Rego's Portfolio Management Base Kit supplements and works with 28 out-of-the-box portlets and workflows.



Rego Base Kits are Supported by regoXchange

regoxchange is the largest PPM content library with hundreds of prebuilt portlets, training artifacts (including videos), reports, technical tricks, and workflows designed to help users increase the value of their PPM tool.

Pricing Information

The Rego Portfolio Management Base Kit is priced as a one-time cost, or users can subscribe to regoXchange for access to all regoXchange content.

# of CA PPM Users	Portfolio Management Base Kit	regoxchange theWorX Subscription
0-99	\$1,000	\$2,500
100-499	\$2,000	\$5,000
500-2,999	\$2,000	\$7,500
3,000 and Up	\$2,000	\$10,000

Other Base Kits Offered by Rego

- Administrative
- Adoption Metrics
- Demand Management
- Financial Management
- Performance Monitoring
- Portfolio Management
- Project Scheduling
- Resource Management
- Resource Management—Advanced
- Time Tracking