



regoExpress

# The Rego Resource Management—Advanced Base Kit

Utilize key metrics with Resource Management—Advanced 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 Resource Management—Advanced Base Kit is loaded with five Rego-developed portlets, three processes, and comprehensive training materials that supplement 14 out-of-the-box reports and portlets. As compared to the Basic Resource Management Kit, this package is intended to support the needs of companies that have matured or intend to mature their resource management processes to the point of utilizing more advanced capabilities in CA PPM.

Resource Assignments and Estimate (ETC) Management

Resource Skills

Hard / Soft Booking Processes

Alignment of Resources to Applications

Effort Baselines

# What's Included:

## Rego Developed Processes



### **Transfer Primary Skill:**

This process makes the transition seamless from resource primary skill to team primary skill for a quick way to determine what skill each resource is bringing to the project.



### **Move Role to Team/Assignment:**

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 is NULL on the team and assignment objects.



### **Update Team, Assignment, & Timesheet Roles:**

Where they do not match, this process updates the team, assignment, and timesheet roles with the primary role, so the PM can push all roles to team and assignment for that project before they do a cost plan.

## Rego Developed Portlets



### **All Skills:**

The All Skills portlet displays active skills available in the skills hierarchy without requiring administrative rights.



### **Capacity Planning by Primary Application:**

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.



### **Capacity Planning by Role & Skill:**

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.



### **Resource Proficiency:**

This grid displays Skill Proficiency and Interest Level by resource and grants a manager the ability to determine which resources best fit the needs for their project.



### **Capacity Planning by Role and Primary App:**

This portlet pulls back the Availability and Allocation totals by Role, then the user can drill down to look at the information for Applications and compare the values across different timeframes 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.

## Training Guides



### **Adding Resource Skills:**

This quick reference card will assist in adding Resource Skills, which are used to track core capabilities as they relate to investment work.



### **Recommended Dashboard Configuration:**

Assistance ordering your Resource Management Dashboard by Capacity, Demand, Booking, Actuals, Utilization, and Compliance.



Let Rego Be Your Guide.

Rego's Resource Management—Advanced Base Kit supplements and works with 14 OOTB reports and portlets including

Resource Utilization

Resource Utilization by Month

Unfilled Requirements

Top-Down Planning by Investment

Booking Status



## 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 Resource Management—Advanced 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	RM—Advanced 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