regoUniversity

KANSAS CITY • 2024

Visualization & Dashboards Best Practices & Sharing

Your Guides:

Ross Hensel & Lulu Wang

Platinum Sponsor

ValueOps by Broadcom

Rally by Broadcom

Clarity by Broadcom

Agenda

- Introduction
- Customer Reporting Samples
- Questions
- Additional Resources

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

Presenters

- 5-minute overview
- MAYBE 1-2 questions
- If you like a report, jot down the name and the company! Find them after

- Hershey's – Danielle Weynberg
- Nav Canada – Cristina Irimes
- Canada Life – Irene Pavlakis
- Rheem - Dennis Lahmann
- UCSF - Andrea Dowling
- Federal Reserve of MPLS – Carol Allen

Client Reporting Samples

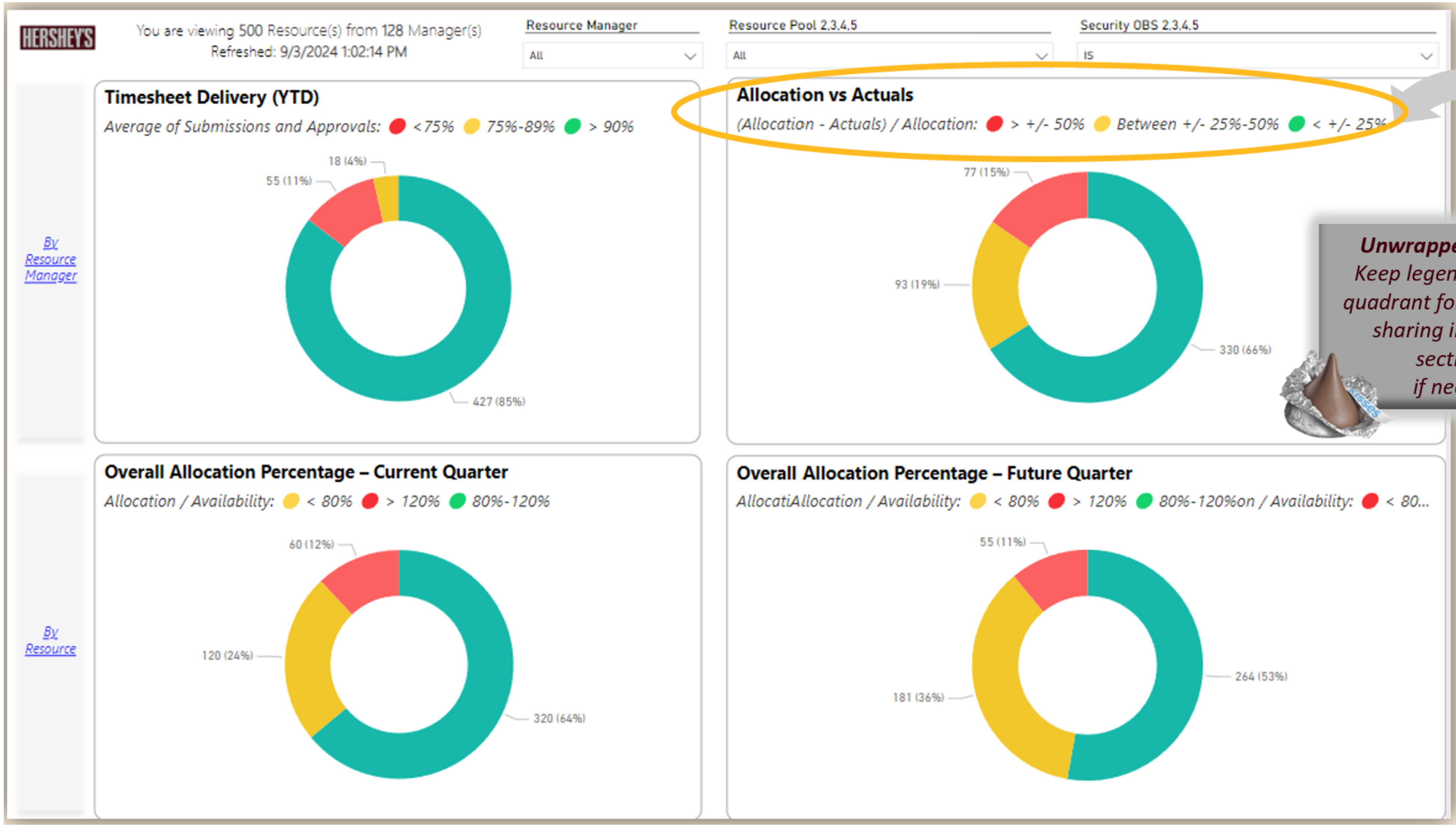
Let Rego be your guide.

regoUniversity
KANSAS CITY · 2024

HERSHEY

Danielle Weynberg

Resource Compliance



HERSHEY'S

You are viewing 500 Resource(s) from 128 Manager(s)
Refreshed: 9/3/2024 1:02:14 PM

Resource Manager: All

Resource Pool 2,3,4,5: All

Security OBS 2,3,4,5: IS

By Resource Manager

By Resource

Timesheet Delivery (YTD)

Average of Submissions and Approvals: 🔴 *<75%* 🟡 *75%-89%* 🟢 *> 90%*

Allocation vs Actuals

(Allocation - Actuals) / Allocation: 🔴 *> +/- 50%* 🟡 *Between +/- 25%-50%* 🟢 *< +/- 25%*

Overall Allocation Percentage – Current Quarter

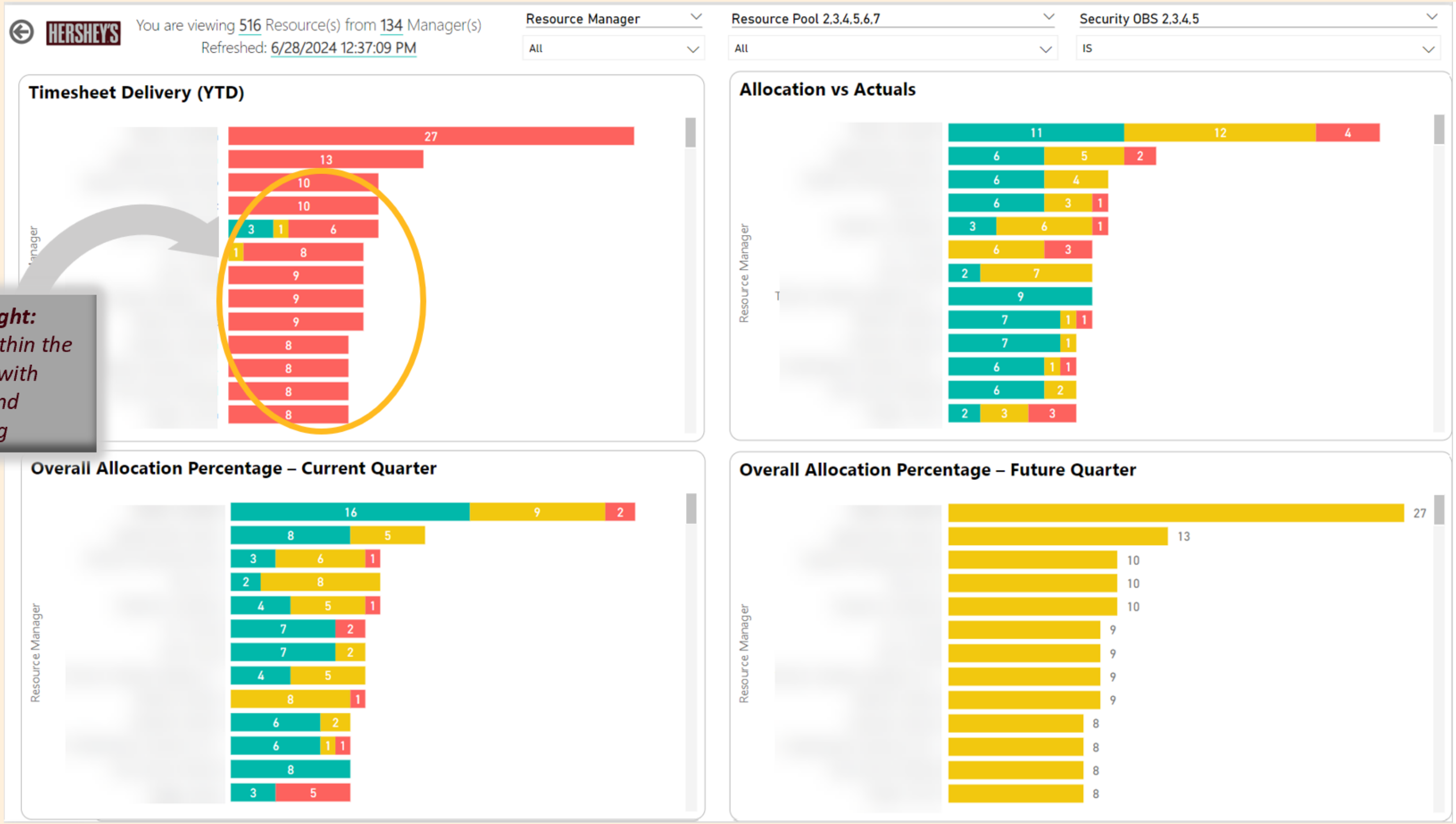
Allocation / Availability: 🟡 *< 80%* 🔴 *> 120%* 🟢 *80%-120%*

Overall Allocation Percentage – Future Quarter

AllocatiAllocation / Availability: 🟡 *< 80%* 🔴 *> 120%* 🟢 *80%-120%on / Availability:* 🔴 *< 80...*

Unwrapped Insight:
Keep legends on each quadrant for usability in sharing individual sections, if needed

By Resource Manager



You are viewing 516 Resource(s) from 134 Manager(s)
Refreshed: 6/28/2024 12:37:09 PM

Resource Manager: All
Resource Pool 2,3,4,5,6,7: All
Security OBS 2,3,4,5: IS

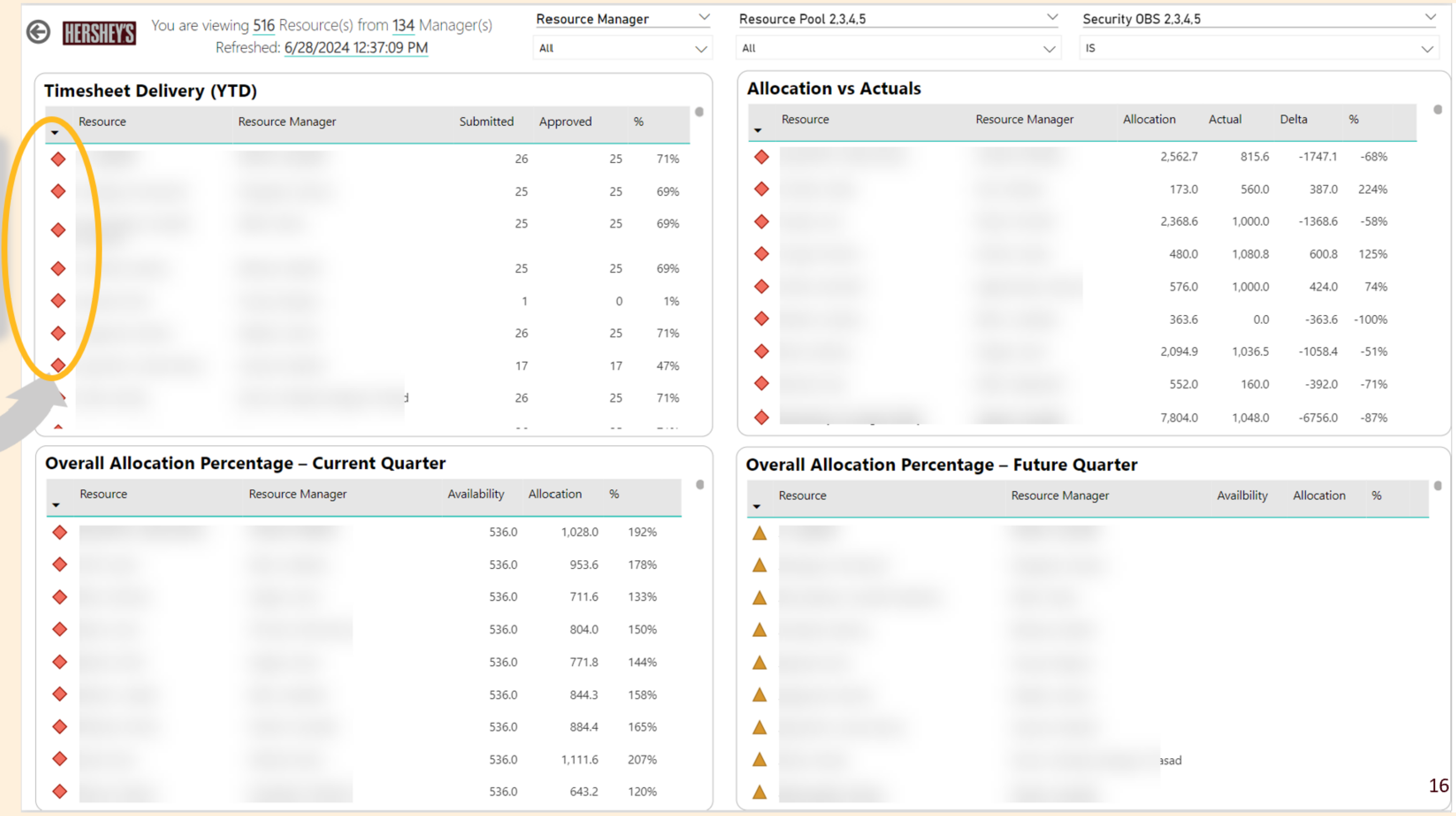
HERSHEY'S
Timesheet Delivery (YTD)
Manager
27
13
10
10
3 1 6
1 8
9
9
9
8
8
8
8
Allocation vs Actuals
Resource Manager
11 12 4
6 5 2
6 4
6 3 1
3 6 1
6 3
2 7
9
7 1 1
7 1
6 1 1
6 2
2 3 3
Overall Allocation Percentage – Current Quarter
Resource Manager
16 9 2
8 5
3 6 1
2 8
4 5 1
7 2
7 2
4 5
8 1
6 2
6 1 1
8
3 5
Overall Allocation Percentage – Future Quarter
Resource Manager
27
13
10
10
10
9
9
9
9
8
8
8
8

Unwrapped Insight:
Putting the count within the grid views helps with visualization and understanding

HERSHEY'S

Resource Compliance Detail

Unwrapped Insight:
Use colors and shapes to identify the statuses to ensure it is inclusive, while also being easily understood



HERSHEY'S You are viewing 516 Resource(s) from 134 Manager(s)
Refreshed: 6/28/2024 12:37:09 PM

Resource Manager: All
Resource Pool 2,3,4,5: All
Security OBS 2,3,4,5: IS

Timesheet Delivery (YTD)

	Resource	Resource Manager	Submitted	Approved	%
◆	[redacted]	[redacted]	26	25	71%
◆	[redacted]	[redacted]	25	25	69%
◆	[redacted]	[redacted]	25	25	69%
◆	[redacted]	[redacted]	25	25	69%
◆	[redacted]	[redacted]	1	0	1%
◆	[redacted]	[redacted]	26	25	71%
◆	[redacted]	[redacted]	17	17	47%
◆	[redacted]	[redacted]d	26	25	71%

Allocation vs Actuals

	Resource	Resource Manager	Allocation	Actual	Delta	%
◆	[redacted]	[redacted]	2,562.7	815.6	-1747.1	-68%
◆	[redacted]	[redacted]	173.0	560.0	387.0	224%
◆	[redacted]	[redacted]	2,368.6	1,000.0	-1368.6	-58%
◆	[redacted]	[redacted]	480.0	1,080.8	600.8	125%
◆	[redacted]	[redacted]	576.0	1,000.0	424.0	74%
◆	[redacted]	[redacted]	363.6	0.0	-363.6	-100%
◆	[redacted]	[redacted]	2,094.9	1,036.5	-1058.4	-51%
◆	[redacted]	[redacted]	552.0	160.0	-392.0	-71%
◆	[redacted]	[redacted]	7,804.0	1,048.0	-6756.0	-87%

Overall Allocation Percentage – Current Quarter

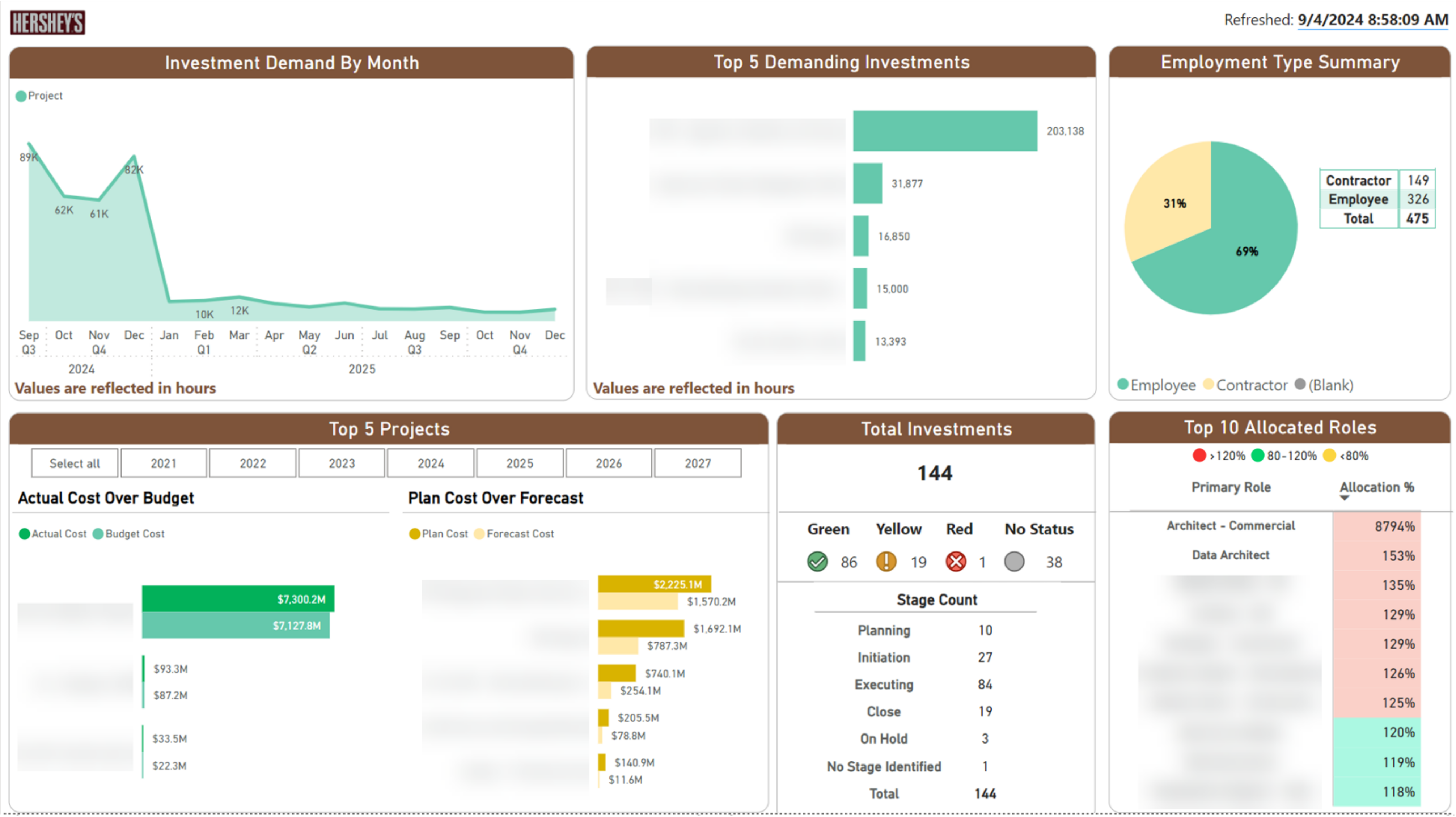
	Resource	Resource Manager	Availability	Allocation	%
◆	[redacted]	[redacted]	536.0	1,028.0	192%
◆	[redacted]	[redacted]	536.0	953.6	178%
◆	[redacted]	[redacted]	536.0	711.6	133%
◆	[redacted]	[redacted]	536.0	804.0	150%
◆	[redacted]	[redacted]	536.0	771.8	144%
◆	[redacted]	[redacted]	536.0	844.3	158%
◆	[redacted]	[redacted]	536.0	884.4	165%
◆	[redacted]	[redacted]	536.0	1,111.6	207%
◆	[redacted]	[redacted]	536.0	643.2	120%

Overall Allocation Percentage – Future Quarter

	Resource	Resource Manager	Availibility	Allocation	%
▲	[redacted]	[redacted]			
▲	[redacted]	[redacted]			
▲	[redacted]	[redacted]			
▲	[redacted]	[redacted]			
▲	[redacted]	[redacted]			
▲	[redacted]	[redacted]			
▲	[redacted]	[redacted]			
▲	[redacted]	[redacted]sad			
▲	[redacted]	[redacted]			

HERSHEY'S

Executive Summary


HERSHEY'S
Investment Demand By Month
Project
89K
62K
61K
82K
10K
12K
Sep Q3
Oct
Nov Q4
Dec
Jan
Feb Q1
Mar
Apr
May Q2
Jun
Jul
Aug Q3
Sep
Oct
Nov Q4
Dec
2024
2025
Top 5 Demanding Investments
203,138
31,877
16,850
15,000
13,393
Employment Type Summary
31%
69%
Employee
Contractor
(Blank)
Top 5 Projects
Select all
2021
2022
2023
2024
2025
2026
2027
Actual Cost Over Budget
Actual Cost
Budget Cost
$7,300.2M
$7,127.8M
$93.3M
$87.2M
$33.5M
$22.3M
Plan Cost Over Forecast
Plan Cost
Forecast Cost
$2,225.1M
$1,570.2M
$1,692.1M
$787.3M
$740.1M
$254.1M
$205.5M
$78.8M
$140.9M
$11.6M

Refreshed: 9/4/2024 8:58:09 AM

Values are reflected in hours

Values are reflected in hours

Employment Type Summary

Contractor	149
Employee	326
Total	475

Total Investments

144

Green	Yellow	Red	No Status
✓ 86	! 19	✗ 1	● 38

Stage Count	
Planning	10
Initiation	27
Executing	84
Close	19
On Hold	3
No Stage Identified	1
Total	144

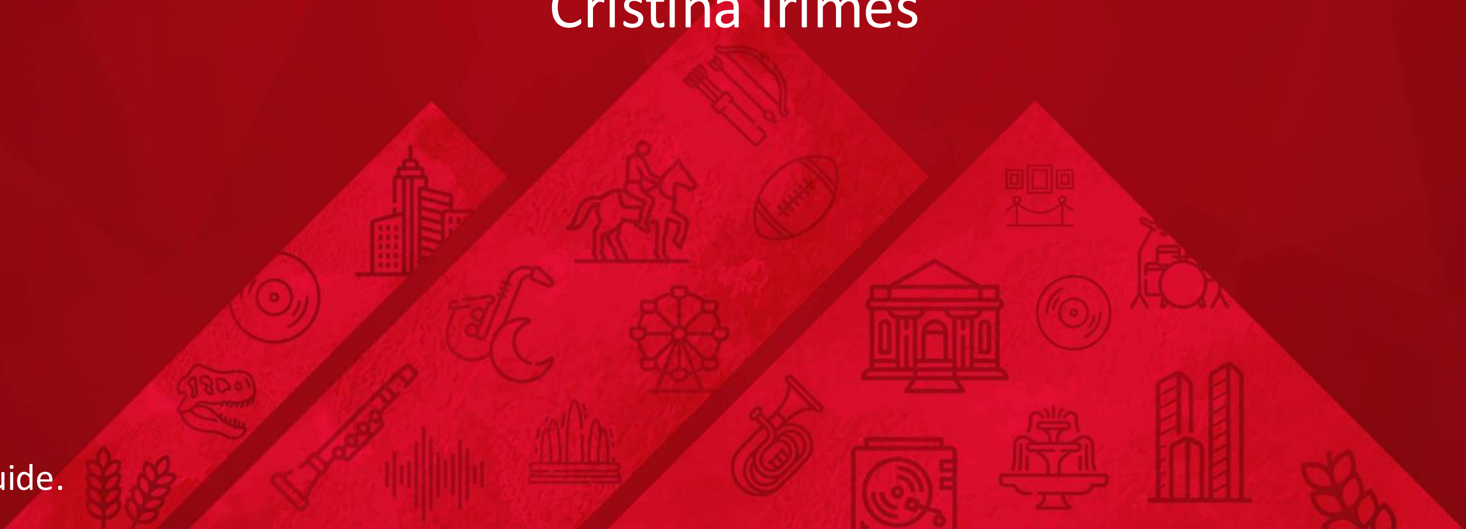
Top 10 Allocated Roles

🔴 >120% 🟢 80-120% 🟡 <80%

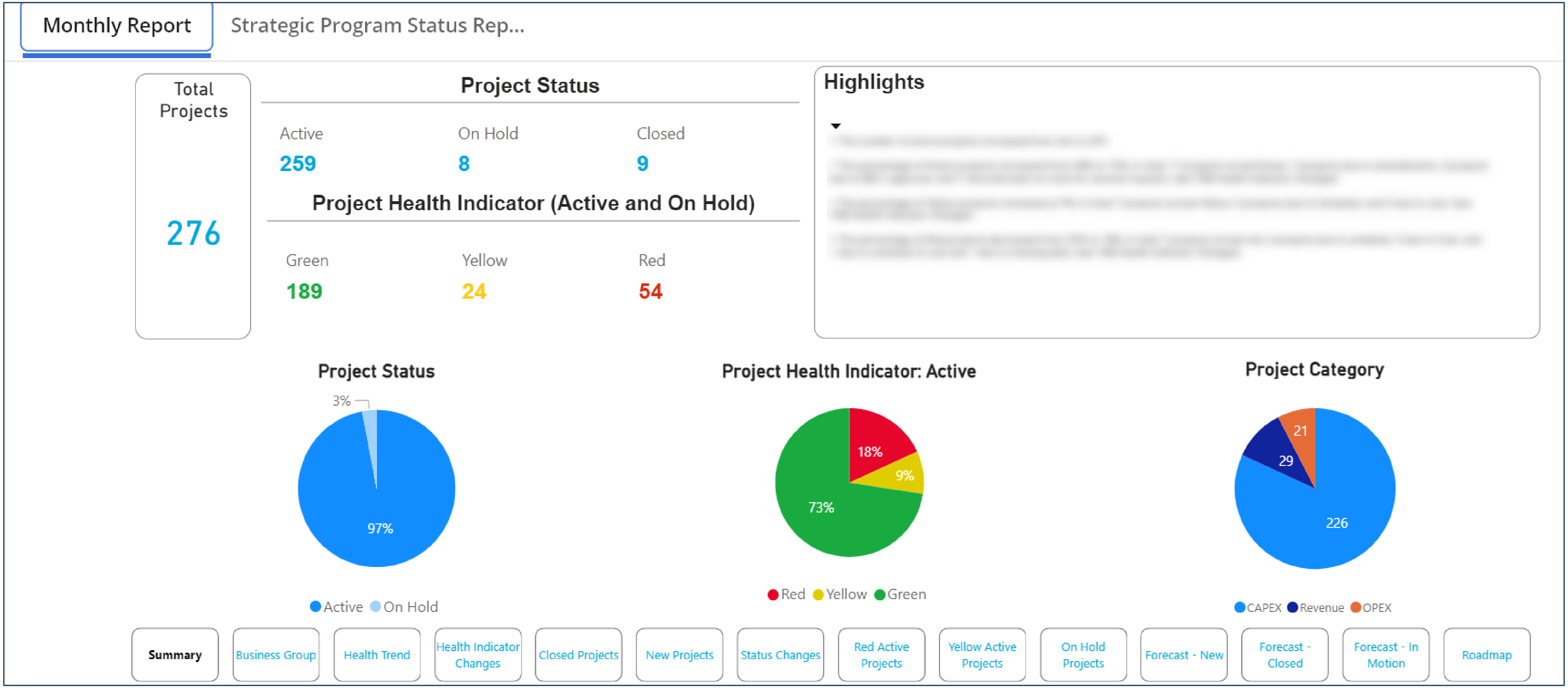
Primary Role	Allocation %
Architect - Commercial	8794%
Data Architect	153%
[redacted]	135%
[redacted]	129%
[redacted]	129%
[redacted]	126%
[redacted]	125%
[redacted]	120%
[redacted]	119%
[redacted]	118%

NAV CANADA

Cristina Irimes



Monthly Portfolio Delivery Report



Monthly Report
Strategic Program Status Rep...

Total Projects

276

Project Status

Active	On Hold	Closed
259	8	9

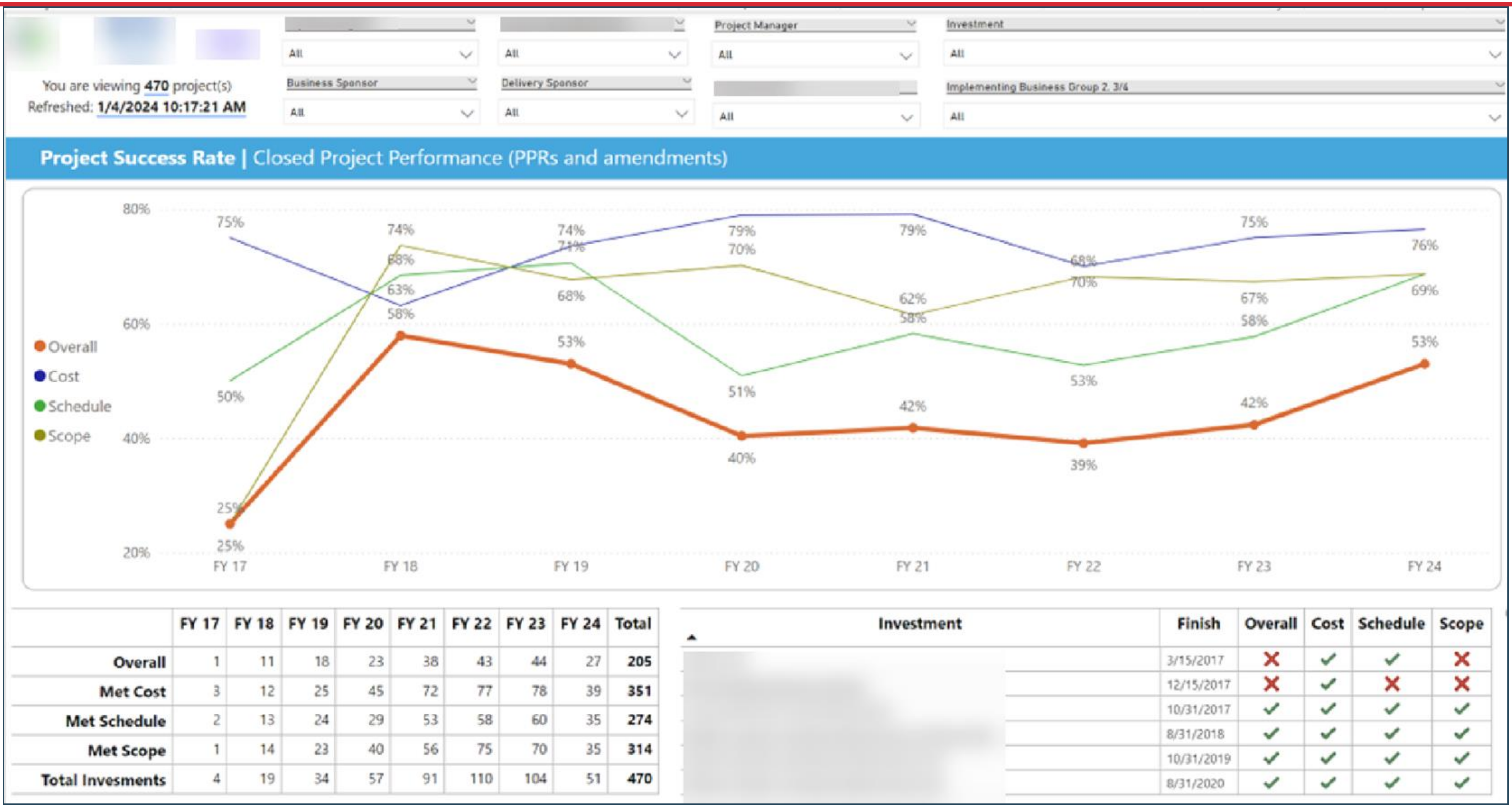
Project Health Indicator (Active and On Hold)

Green	Yellow	Red
189	24	54

Highlights

Project Status
3%
97%
Active
On Hold
Project Health Indicator: Active
18%
9%
73%
Red
Yellow
Green
Project Category
21
29
226
CAPEX
Revenue
OPEX
Summary
Business Group
Health Trend
Health Indicator Changes
Closed Projects
New Projects
Status Changes
Red Active Projects
Yellow Active Projects
On Hold Projects
Forecast - New
Forecast - Closed
Forecast - In Motion
Roadmap

Closed Project Performance Report


80%
60%
40%
20%
Overall
Cost
Schedule
Scope
75%
50%
25%
25%
74%
68%
63%
58%
74%
71%
68%
53%
79%
70%
51%
40%
79%
62%
58%
42%
68%
70%
53%
39%
75%
67%
58%
42%
76%
69%
53%
FY 17
FY 18
FY 19
FY 20
FY 21
FY 22
FY 23
FY 24

You are viewing **470** project(s)
Refreshed: **1/4/2024 10:17:21 AM**

All

All

Project Manager: All

Investment: All

Business Sponsor: All

Delivery Sponsor: All

All

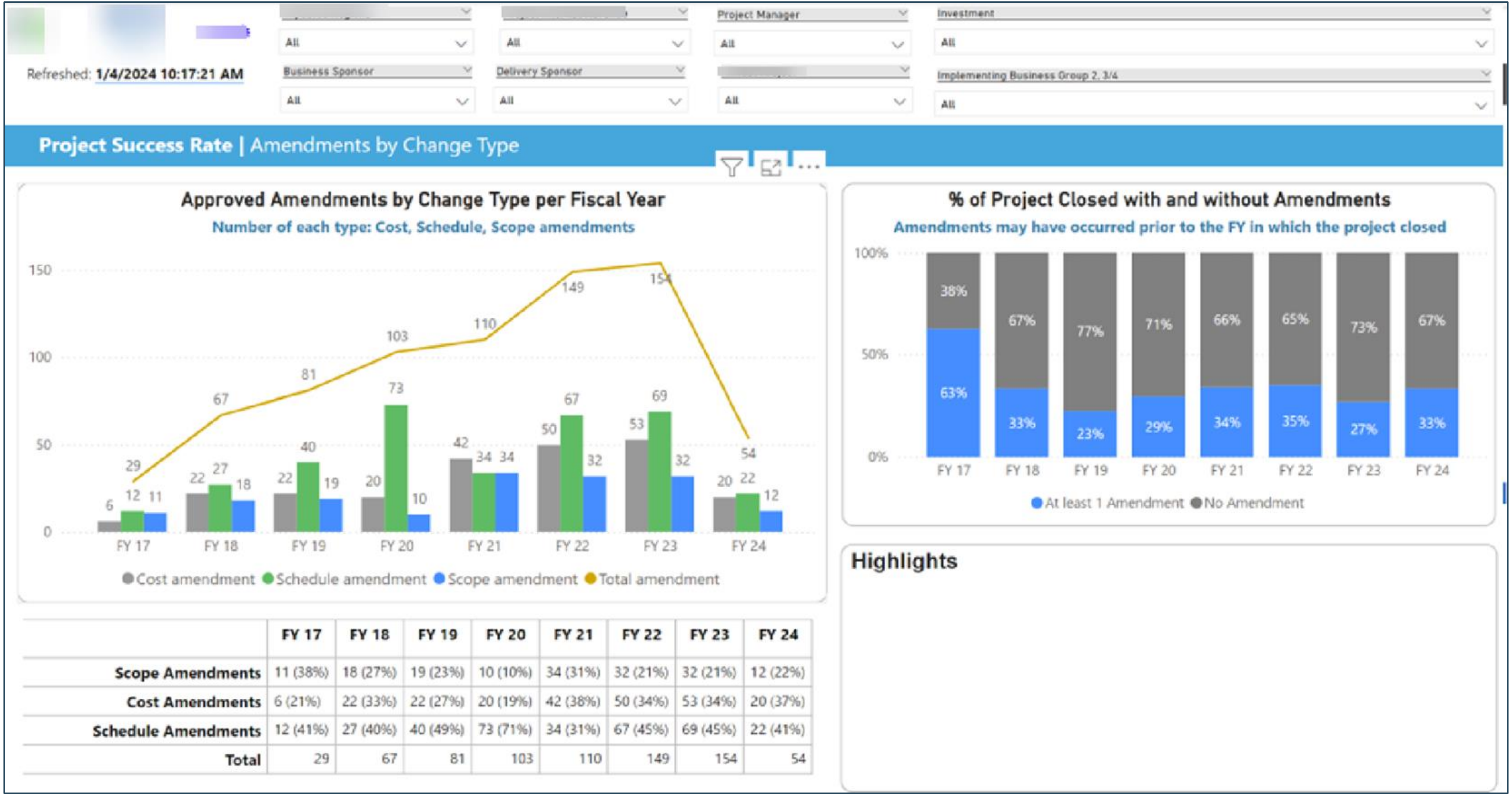
Implementing Business Group 2, 3/4: All

Project Success Rate | Closed Project Performance (PPRs and amendments)

	FY 17	FY 18	FY 19	FY 20	FY 21	FY 22	FY 23	FY 24	Total
Overall	1	11	18	23	38	43	44	27	**205**
Met Cost	3	12	25	45	72	77	78	39	**351**
Met Schedule	2	13	24	29	53	58	60	35	**274**
Met Scope	1	14	23	40	56	75	70	35	**314**
Total Invesments	4	19	34	57	91	110	104	51	**470**

Investment ▲	Finish	Overall	Cost	Schedule	Scope
[redacted]	3/15/2017	✗	✓	✓	✗
[redacted]	12/15/2017	✗	✓	✗	✗
[redacted]	10/31/2017	✓	✓	✓	✓
[redacted]	8/31/2018	✓	✓	✓	✓
[redacted]	10/31/2019	✓	✓	✓	✓
[redacted]	8/31/2020	✓	✓	✓	✓

Project Success Rate



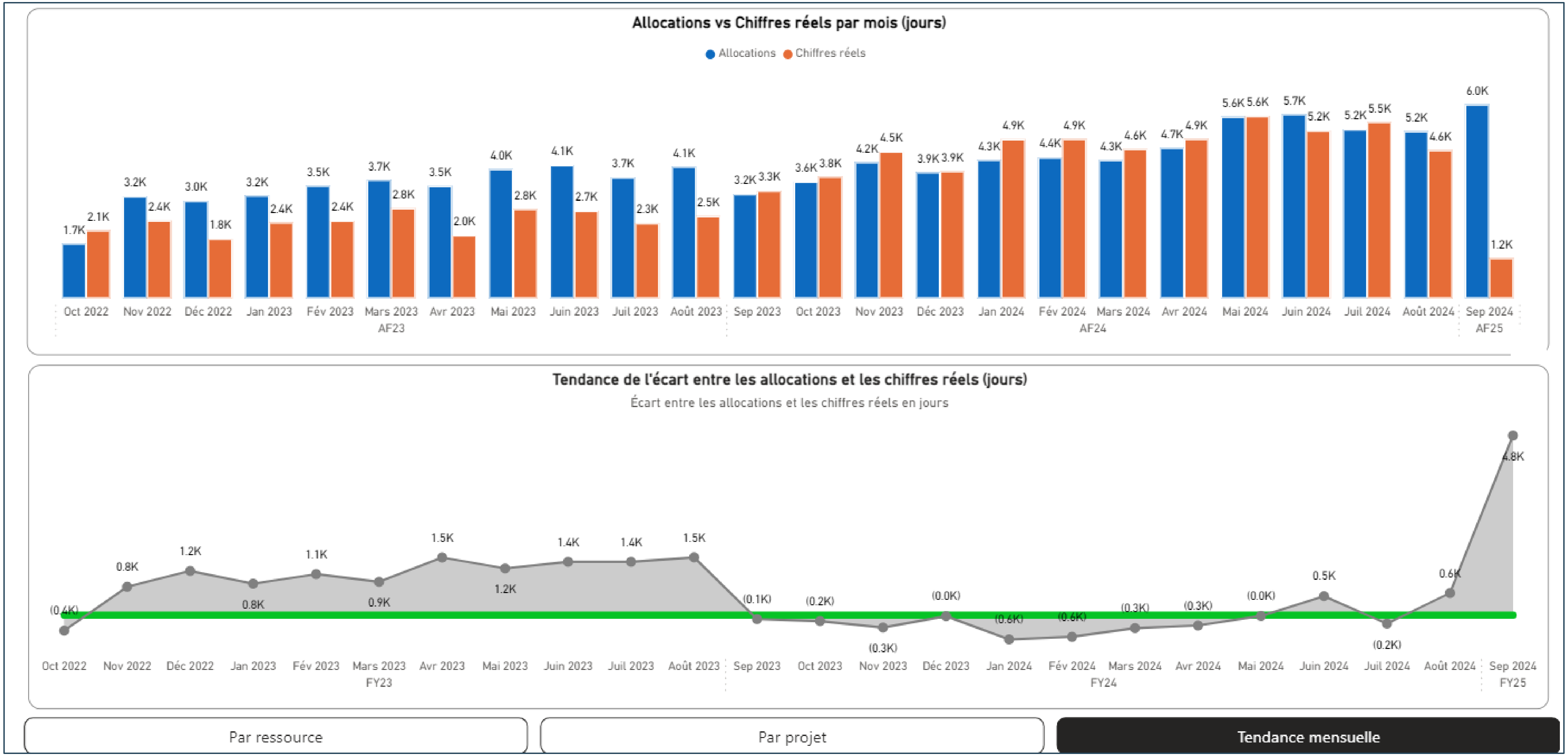
Project Manager
Investment
All
All
All
All
Refreshed: 1/4/2024 10:17:21 AM
Business Sponsor
Delivery Sponsor
Implementing Business Group 2, 3/4
All
All
All
All
Approved Amendments by Change Type per Fiscal Year
Number of each type: Cost, Schedule, Scope amendments
150
100
50
0
29
6
12
11
67
22
27
18
81
22
40
19
103
20
73
10
110
42
34
34
149
50
67
32
154
53
69
32
54
20
22
12
FY 17
FY 18
FY 19
FY 20
FY 21
FY 22
FY 23
FY 24
● Cost amendment ● Schedule amendment ● Scope amendment ● Total amendment
% of Project Closed with and without Amendments
Amendments may have occurred prior to the FY in which the project closed
100%
50%
0%
38%
63%
67%
33%
77%
23%
71%
29%
66%
34%
65%
35%
73%
27%
67%
33%
FY 17
FY 18
FY 19
FY 20
FY 21
FY 22
FY 23
FY 24
● At least 1 Amendment ● No Amendment

Project Success Rate | Amendments by Change Type

	FY 17	FY 18	FY 19	FY 20	FY 21	FY 22	FY 23	FY 24
Scope Amendments	11 (38%)	18 (27%)	19 (23%)	10 (10%)	34 (31%)	32 (21%)	32 (21%)	12 (22%)
Cost Amendments	6 (21%)	22 (33%)	22 (27%)	20 (19%)	42 (38%)	50 (34%)	53 (34%)	20 (37%)
Schedule Amendments	12 (41%)	27 (40%)	40 (49%)	73 (71%)	34 (31%)	67 (45%)	69 (45%)	22 (41%)
Total	29	67	81	103	110	149	154	54

Highlights

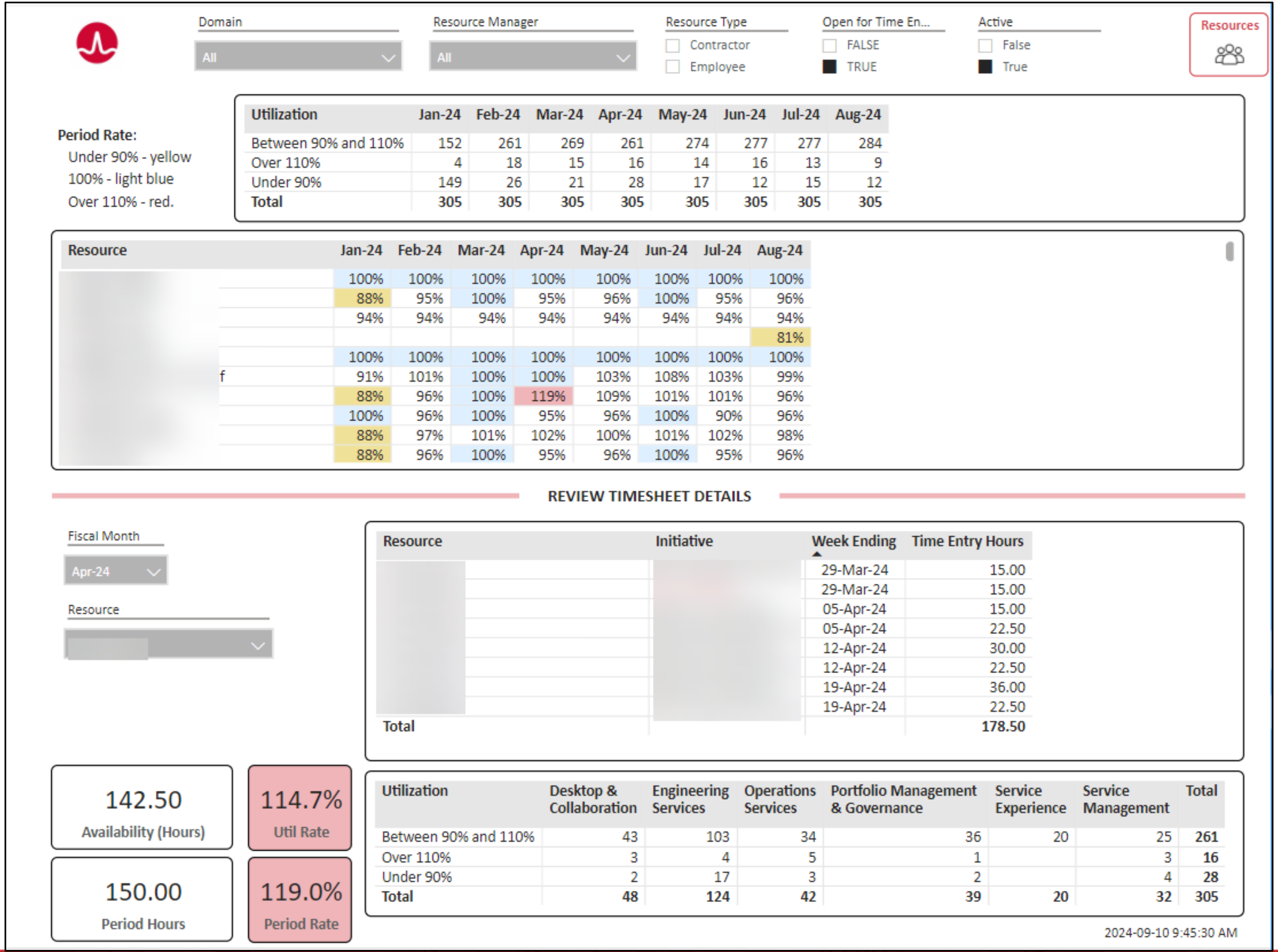
Allocations vs Actuals (Bilingual)


Allocations vs Chiffres réels par mois (jours)
● Allocations ● Chiffres réels
Oct 2022 1.7K 2.1K
Nov 2022 3.2K 2.4K
Déc 2022 3.0K 1.8K
Jan 2023 3.2K 2.4K
Fév 2023 3.5K 2.4K
Mars 2023 3.7K 2.8K
Avr 2023 3.5K 2.0K
Mai 2023 4.0K 2.8K
Juin 2023 4.1K 2.7K
Juil 2023 3.7K 2.3K
Août 2023 4.1K 2.5K
Sep 2023 3.2K 3.3K
Oct 2023 3.6K 3.8K
Nov 2023 4.2K 4.5K
Déc 2023 3.9K 3.9K
Jan 2024 4.3K 4.9K
Fév 2024 4.4K 4.9K
Mars 2024 4.3K 4.6K
Avr 2024 4.7K 4.9K
Mai 2024 5.6K 5.6K
Juin 2024 5.7K 5.2K
Juil 2024 5.2K 5.5K
Août 2024 5.2K 4.6K
Sep 2024 6.0K 1.2K
AF23
AF24
AF25
Tendance de l'écart entre les allocations et les chiffres réels (jours)
Écart entre les allocations et les chiffres réels en jours
Oct 2022 (0.4K)
Nov 2022 0.8K
Déc 2022 1.2K
Jan 2023 0.8K
Fév 2023 1.1K
Mars 2023 0.9K
Avr 2023 1.5K
Mai 2023 1.2K
Juin 2023 1.4K
Juil 2023 1.4K
Août 2023 1.5K
Sep 2023 (0.1K)
Oct 2023 (0.2K)
Nov 2023 (0.3K)
Déc 2023 (0.0K)
Jan 2024 (0.6K)
Fév 2024 (0.6K)
Mars 2024 (0.3K)
Avr 2024 (0.3K)
Mai 2024 (0.0K)
Juin 2024 0.5K
Juil 2024 (0.2K)
Août 2024 0.6K
Sep 2024 4.8K
FY23
FY24
FY25
Par ressource
Par projet
Tendance mensuelle

canada life™

Irene Pavlakis

Resource Utilization



Domain: All

Resource Manager: All

Resource Type
- ☐ Contractor
- ☐ Employee

Open for Time En...
- ☐ FALSE
- ■ TRUE

Active
- ☐ False
- ■ True

Period Rate:
Under 90% - yellow
100% - light blue
Over 110% - red.

Utilization	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24
Between 90% and 110%	152	261	269	261	274	277	277	284
Over 110%	4	18	15	16	14	16	13	9
Under 90%	149	26	21	28	17	12	15	12
Total	**305**	**305**	**305**	**305**	**305**	**305**	**305**	**305**

Resource	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24
[redacted]	100%	100%	100%	100%	100%	100%	100%	100%
[redacted]	88%	95%	100%	95%	96%	100%	95%	96%
[redacted]	94%	94%	94%	94%	94%	94%	94%	94%
[redacted]								81%
[redacted]	100%	100%	100%	100%	100%	100%	100%	100%
[redacted]	91%	101%	100%	100%	103%	108%	103%	99%
[redacted]	88%	96%	100%	119%	109%	101%	101%	96%
[redacted]	100%	96%	100%	95%	96%	100%	90%	96%
[redacted]	88%	97%	101%	102%	100%	101%	102%	98%
[redacted]	88%	96%	100%	95%	96%	100%	95%	96%

REVIEW TIMESHEET DETAILS

Fiscal Month: Apr-24

Resource: [redacted]

Resource	Initiative	Week Ending	Time Entry Hours
[redacted]	[redacted]	29-Mar-24	15.00
[redacted]	[redacted]	29-Mar-24	15.00
[redacted]	[redacted]	05-Apr-24	15.00
[redacted]	[redacted]	05-Apr-24	22.50
[redacted]	[redacted]	12-Apr-24	30.00
[redacted]	[redacted]	12-Apr-24	22.50
[redacted]	[redacted]	19-Apr-24	36.00
[redacted]	[redacted]	19-Apr-24	22.50
Total			**178.50**

142.50
Availability (Hours)

114.7%
Util Rate

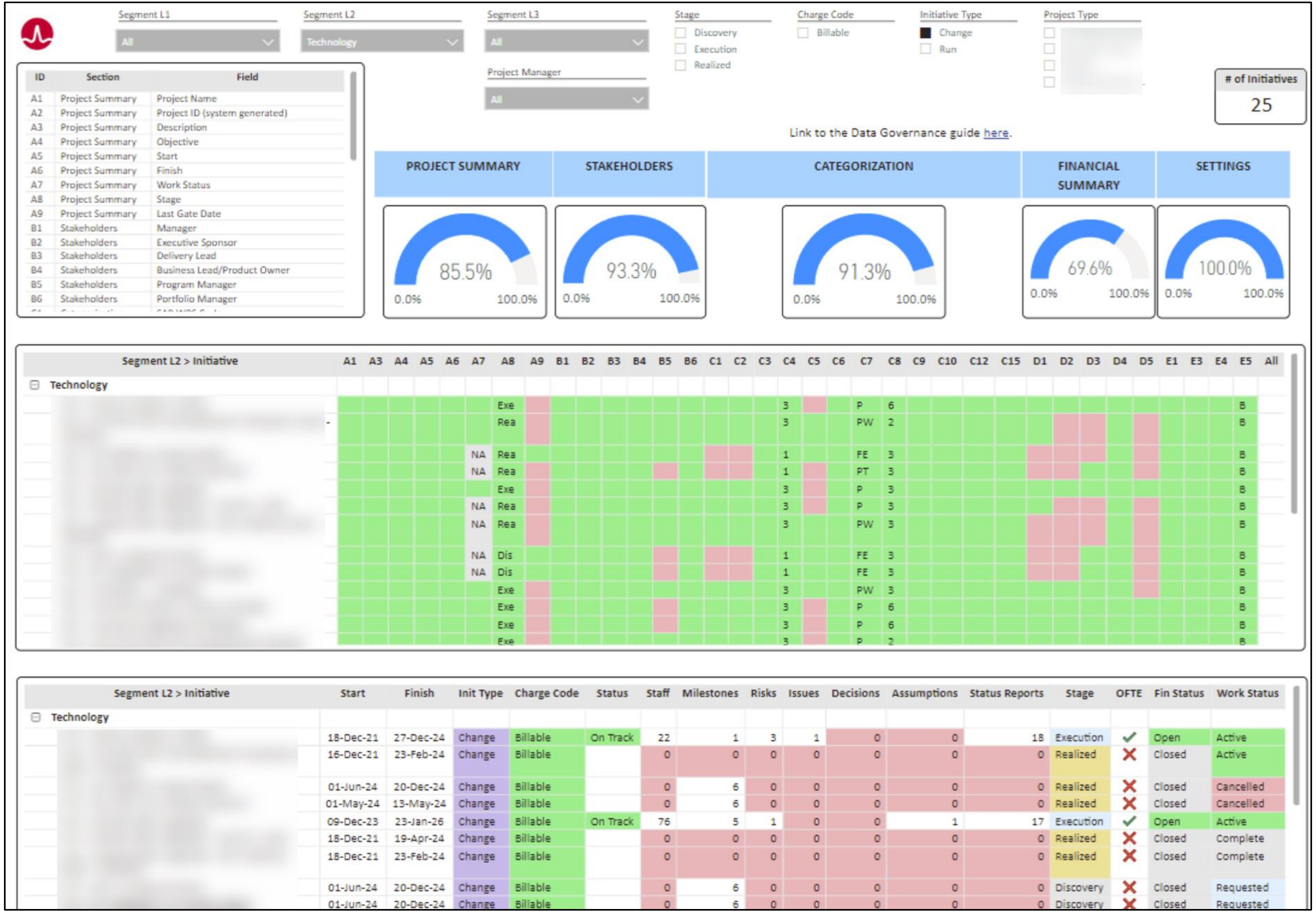
150.00
Period Hours

119.0%
Period Rate

Utilization	Desktop & Collaboration	Engineering Services	Operations Services	Portfolio Management & Governance	Service Experience	Service Management	Total
Between 90% and 110%	43	103	34	36	20	25	**261**
Over 110%	3	4	5	1		3	**16**
Under 90%	2	17	3	2		4	**28**
Total	**48**	**124**	**42**	**39**	**20**	**32**	**305**

2024-09-10 9:45:30 AM

Data Governance



Segment L1: All

Segment L2: Technology

Segment L3: All

Project Manager: All

Stage
☐ Discovery
☐ Execution
☐ Realized

Charge Code
☐ Billable

Initiative Type
■ Change
☐ Run

Project Type
☐
☐
☐
☐

# of Initiatives: 25

Link to the Data Governance guide here.

ID	Section	Field
A1	Project Summary	Project Name
A2	Project Summary	Project ID (system generated)
A3	Project Summary	Description
A4	Project Summary	Objective
A5	Project Summary	Start
A6	Project Summary	Finish
A7	Project Summary	Work Status
A8	Project Summary	Stage
A9	Project Summary	Last Gate Date
B1	Stakeholders	Manager
B2	Stakeholders	Executive Sponsor
B3	Stakeholders	Delivery Lead
B4	Stakeholders	Business Lead/Product Owner
B5	Stakeholders	Program Manager
B6	Stakeholders	Portfolio Manager

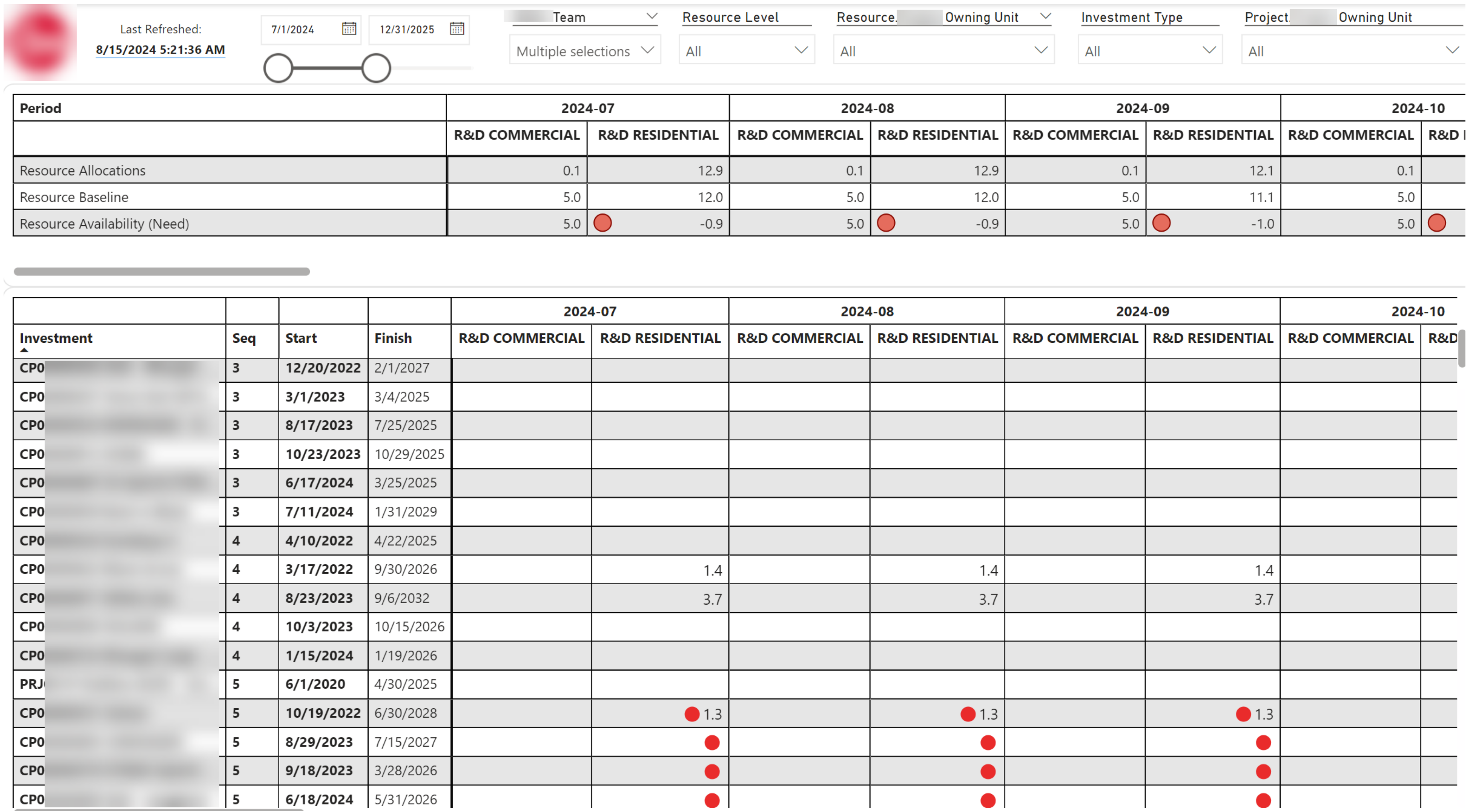
Segment L2 > Initiative	A1	A3	A4	A5	A6	A7	A8	A9	B1	B2	B3	B4	B5	B6	C1	C2	C3	C4	C5	C6	C7	C8	C9	C10	C12	C15	D1	D2	D3	D4	D5	E1	E3	E4	E5	All
⊟ Technology																																				
							Exe											3			P	6													B	
-							Rea											3			PW	2													B	
						NA	Rea											1			FE	3													B	
						NA	Rea											1			PT	3													B	
							Exe											3			P	3													B	
						NA	Rea											3			P	3													B	
						NA	Rea											3			PW	3													B	
						NA	Dis											1			FE	3													B	
						NA	Dis											1			FE	3													B	
							Exe											3			PW	3													B	
							Exe											3			P	6													B	
							Exe											3			P	6													B	
							Exe											3			P	2													B	

Segment L2 > Initiative	Start	Finish	Init Type	Charge Code	Status	Staff	Milestones	Risks	Issues	Decisions	Assumptions	Status Reports	Stage	OFTE	Fin Status	Work Status
⊟ Technology																
	18-Dec-21	27-Dec-24	Change	Billable	On Track	22	1	3	1	0	0	18	Execution	✓	Open	Active
	16-Dec-21	23-Feb-24	Change	Billable		0	0	0	0	0	0	0	Realized	✗	Closed	Active
	01-Jun-24	20-Dec-24	Change	Billable		0	6	0	0	0	0	0	Realized	✗	Closed	Cancelled
	01-May-24	13-May-24	Change	Billable		0	6	0	0	0	0	0	Realized	✗	Closed	Cancelled
	09-Dec-23	23-Jan-26	Change	Billable	On Track	76	5	1	0	0	1	17	Execution	✓	Open	Active
	18-Dec-21	19-Apr-24	Change	Billable		0	0	0	0	0	0	0	Realized	✗	Closed	Complete
	18-Dec-21	23-Feb-24	Change	Billable		0	0	0	0	0	0	0	Realized	✗	Closed	Complete
	01-Jun-24	20-Dec-24	Change	Billable		0	6	0	0	0	0	0	Discovery	✗	Closed	Requested
	01-Jun-24	20-Dec-24	Change	Billable		0	6	0	0	0	0	0	Discovery	✗	Closed	Requested

Rheem®

Dennis Lahmann

Waterline



Last Refreshed:
8/15/2024 5:21:36 AM

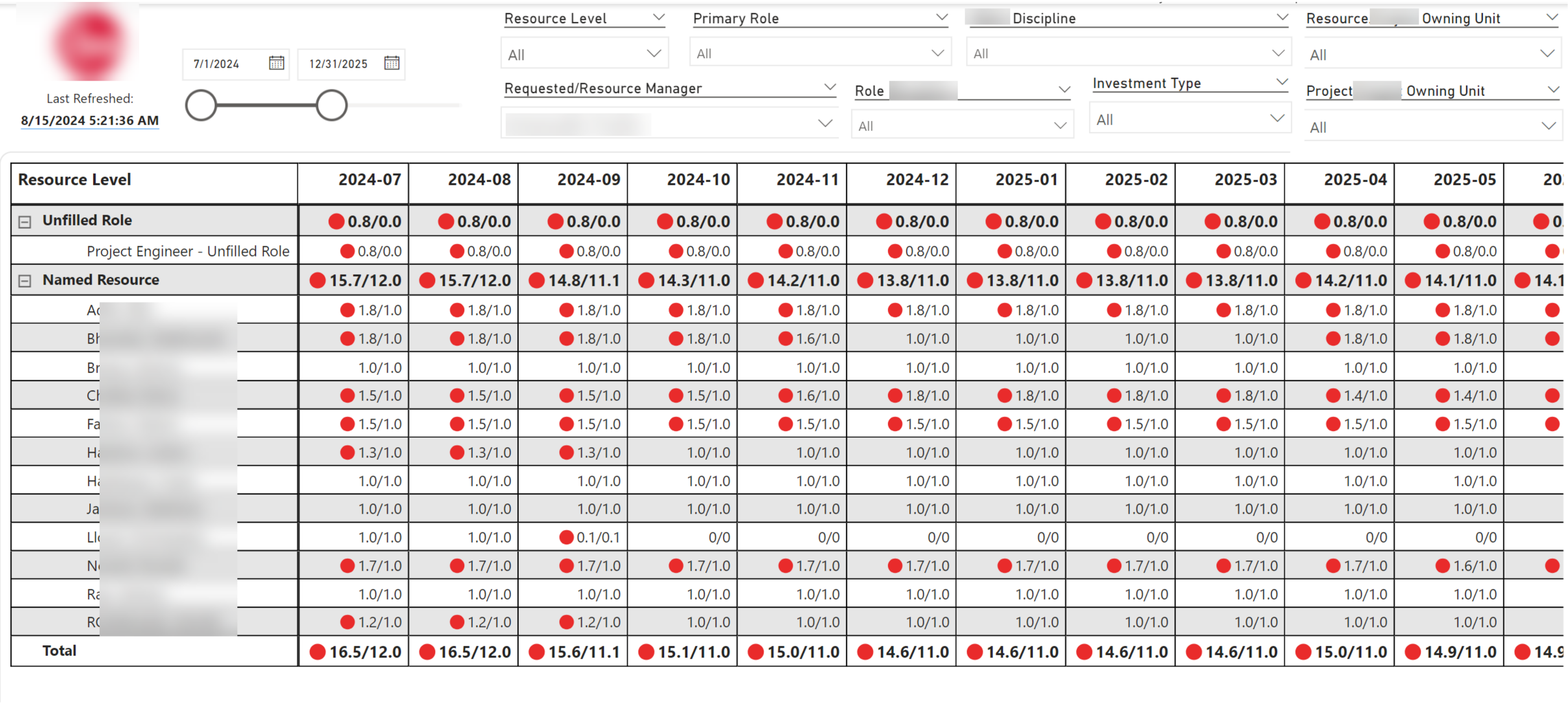
7/1/2024 | 12/31/2025

[redacted] Team: Multiple selections
Resource Level: All
Resource[redacted]Owning Unit: All
Investment Type: All
Project[redacted]Owning Unit: All

Period	2024-07		2024-08		2024-09		2024-10	
	R&D COMMERCIAL	R&D RESIDENTIAL	R&D COMMERCIAL	R&D RESIDENTIAL	R&D COMMERCIAL	R&D RESIDENTIAL	R&D COMMERCIAL	R&D I
Resource Allocations	0.1	12.9	0.1	12.9	0.1	12.1	0.1	
Resource Baseline	5.0	12.0	5.0	12.0	5.0	11.1	5.0	
Resource Availability (Need)	5.0	● -0.9	5.0	● -0.9	5.0	● -1.0	5.0	●

				2024-07		2024-08		2024-09		2024-10	
Investment	Seq	Start	Finish	R&D COMMERCIAL	R&D RESIDENTIAL	R&D COMMERCIAL	R&D RESIDENTIAL	R&D COMMERCIAL	R&D RESIDENTIAL	R&D COMMERCIAL	R&D
CP0[redacted]	3	**12/20/2022**	2/1/2027								
CP0[redacted]	3	**3/1/2023**	3/4/2025								
CP0[redacted]	3	**8/17/2023**	7/25/2025								
CP0[redacted]	3	**10/23/2023**	10/29/2025								
CP0[redacted]	3	**6/17/2024**	3/25/2025								
CP0[redacted]	3	**7/11/2024**	1/31/2029								
CP0[redacted]	4	**4/10/2022**	4/22/2025								
CP0[redacted]	4	**3/17/2022**	9/30/2026		1.4		1.4		1.4		
CP0[redacted]	4	**8/23/2023**	9/6/2032		3.7		3.7		3.7		
CP0[redacted]	4	**10/3/2023**	10/15/2026								
CP0[redacted]	4	**1/15/2024**	1/19/2026								
PRJ[redacted]	5	**6/1/2020**	4/30/2025								
CP0[redacted]	5	**10/19/2022**	6/30/2028		● 1.3		● 1.3		● 1.3		
CP0[redacted]	5	**8/29/2023**	7/15/2027		●		●		●		
CP0[redacted]	5	**9/18/2023**	3/28/2026		●		●		●		
CP0[redacted]	5	**6/18/2024**	5/31/2026		●		●		●		

Demand vs Capacity



Last Refreshed:
8/15/2024 5:21:36 AM

7/1/2024 12/31/2025

Resource Level
All
Primary Role
All
[redacted] Discipline
All
Resource [redacted] Owning Unit
All
Requested/Resource Manager
[redacted]
Role [redacted]
All
Investment Type
All
Project [redacted] Owning Unit
All

Resource Level	2024-07	2024-08	2024-09	2024-10	2024-11	2024-12	2025-01	2025-02	2025-03	2025-04	2025-05	20
⊟ **Unfilled Role**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.8/0.0**	**● 0.**
Project Engineer - Unfilled Role	● 0.8/0.0	● 0.8/0.0	● 0.8/0.0	● 0.8/0.0	● 0.8/0.0	● 0.8/0.0	● 0.8/0.0	● 0.8/0.0	● 0.8/0.0	● 0.8/0.0	● 0.8/0.0	●
⊟ **Named Resource**	**● 15.7/12.0**	**● 15.7/12.0**	**● 14.8/11.1**	**● 14.3/11.0**	**● 14.2/11.0**	**● 13.8/11.0**	**● 13.8/11.0**	**● 13.8/11.0**	**● 13.8/11.0**	**● 14.2/11.0**	**● 14.1/11.0**	**● 14.1**
Ad[redacted]	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	●
Bh[redacted]	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.6/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	● 1.8/1.0	● 1.8/1.0	●
Br[redacted]	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	
Ch[redacted]	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.6/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.8/1.0	● 1.4/1.0	● 1.4/1.0	●
Fa[redacted]	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	● 1.5/1.0	●
Ha[redacted]	● 1.3/1.0	● 1.3/1.0	● 1.3/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	
Ha[redacted]	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	
Ja[redacted]	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	
Ll[redacted]	1.0/1.0	1.0/1.0	● 0.1/0.1	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	
N[redacted]	● 1.7/1.0	● 1.7/1.0	● 1.7/1.0	● 1.7/1.0	● 1.7/1.0	● 1.7/1.0	● 1.7/1.0	● 1.7/1.0	● 1.7/1.0	● 1.7/1.0	● 1.6/1.0	●
Ra[redacted]	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	
RC[redacted]	● 1.2/1.0	● 1.2/1.0	● 1.2/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	
Total	**● 16.5/12.0**	**● 16.5/12.0**	**● 15.6/11.1**	**● 15.1/11.0**	**● 15.0/11.0**	**● 14.6/11.0**	**● 14.6/11.0**	**● 14.6/11.0**	**● 14.6/11.0**	**● 15.0/11.0**	**● 14.9/11.0**	**● 14.9**

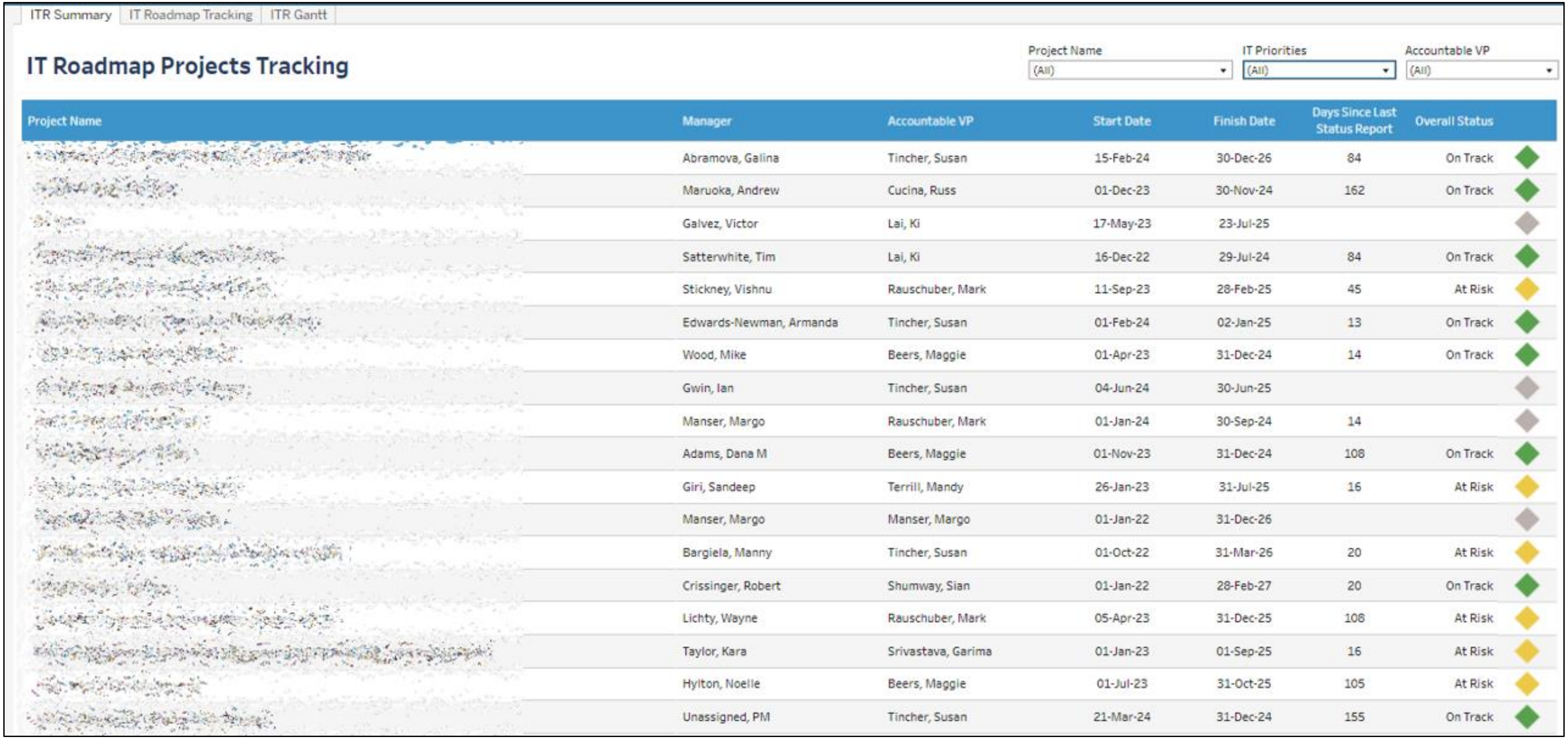
UCSF
University of California
San Francisco

Andrea Dowling

Let Rego be your guide.

regoUniversity
KANSAS CITY · 2024

IT Roadmap Projects Tracking

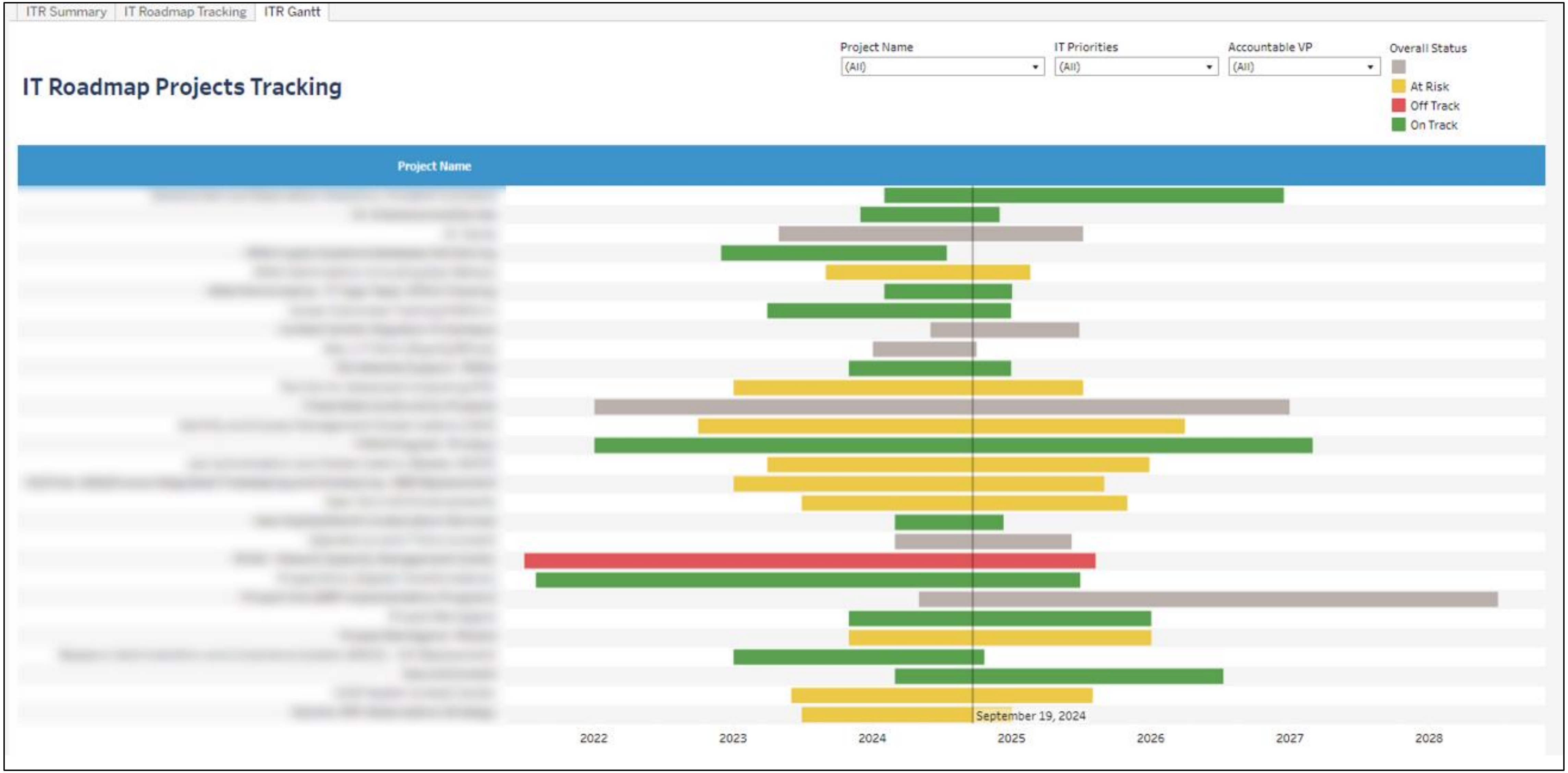


IT Roadmap Projects Tracking

Project Name: (All)
IT Priorities: (All)
Accountable VP: (All)

Project Name	Manager	Accountable VP	Start Date	Finish Date	Days Since Last Status Report	Overall Status	
[redacted]	Abramova, Galina	Tincher, Susan	15-Feb-24	30-Dec-26	84	On Track	🟩
[redacted]	Maruoka, Andrew	Cucina, Russ	01-Dec-23	30-Nov-24	162	On Track	🟩
[redacted]	Galvez, Victor	Lai, Ki	17-May-23	23-Jul-25			⬜
[redacted]	Satterwhite, Tim	Lai, Ki	16-Dec-22	29-Jul-24	84	On Track	🟩
[redacted]	Stickney, Vishnu	Rauschuber, Mark	11-Sep-23	28-Feb-25	45	At Risk	🟨
[redacted]	Edwards-Newman, Armanda	Tincher, Susan	01-Feb-24	02-Jan-25	13	On Track	🟩
[redacted]	Wood, Mike	Beers, Maggie	01-Apr-23	31-Dec-24	14	On Track	🟩
[redacted]	Gwin, Ian	Tincher, Susan	04-Jun-24	30-Jun-25			⬜
[redacted]	Manser, Margo	Rauschuber, Mark	01-Jan-24	30-Sep-24	14		⬜
[redacted]	Adams, Dana M	Beers, Maggie	01-Nov-23	31-Dec-24	108	On Track	🟩
[redacted]	Giri, Sandeep	Terrill, Mandy	26-Jan-23	31-Jul-25	16	At Risk	🟨
[redacted]	Manser, Margo	Manser, Margo	01-Jan-22	31-Dec-26			⬜
[redacted]	Bargiela, Manny	Tincher, Susan	01-Oct-22	31-Mar-26	20	At Risk	🟨
[redacted]	Crissinger, Robert	Shumway, Sian	01-Jan-22	28-Feb-27	20	On Track	🟩
[redacted]	Lichty, Wayne	Rauschuber, Mark	05-Apr-23	31-Dec-25	108	At Risk	🟨
[redacted]	Taylor, Kara	Srivastava, Garima	01-Jan-23	01-Sep-25	16	At Risk	🟨
[redacted]	Hylton, Noelle	Beers, Maggie	01-Jul-23	31-Oct-25	105	At Risk	🟨
[redacted]	Unassigned, PM	Tincher, Susan	21-Mar-24	31-Dec-24	155	On Track	🟩

IT Roadmap Projects Tracking



ITR Summary
IT Roadmap Tracking
ITR Gantt

IT Roadmap Projects Tracking

Project Name: (All)

IT Priorities: (All)

Accountable VP: (All)

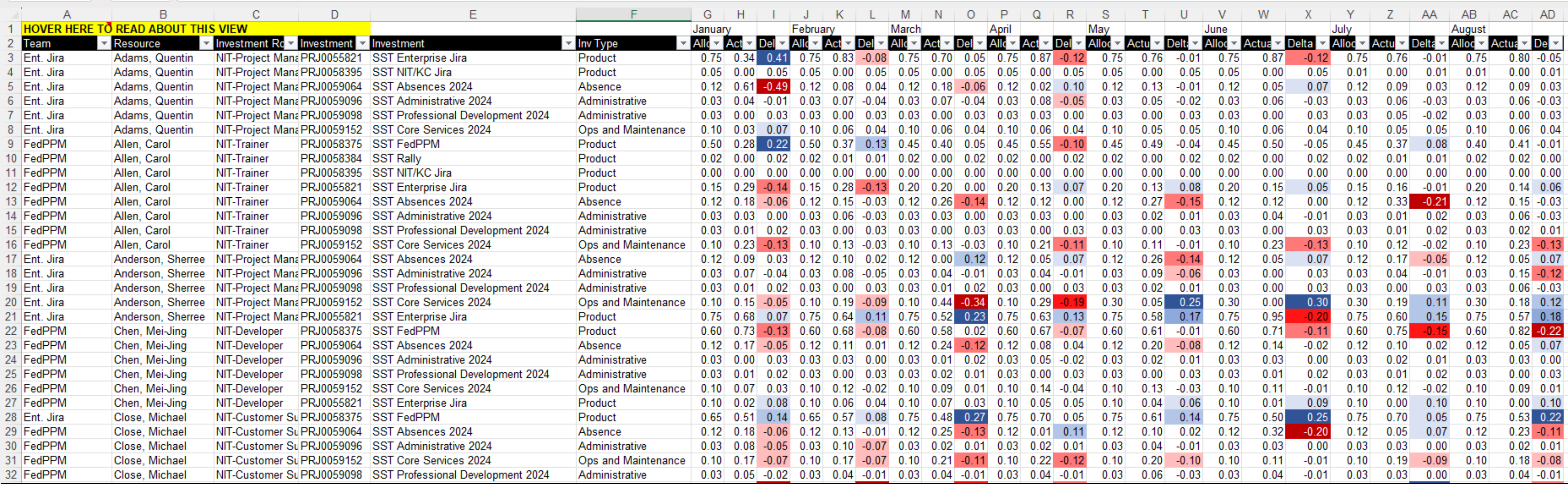
Overall Status
- ▨
- 🟨 At Risk
- 🟥 Off Track
- 🟩 On Track

Project Name
September 19, 2024
2022
2023
2024
2025
2026
2027
2028

UNITED STATES FEDERAL RESERVE SYSTEM

Carol Allen

Allocations vs Actuals

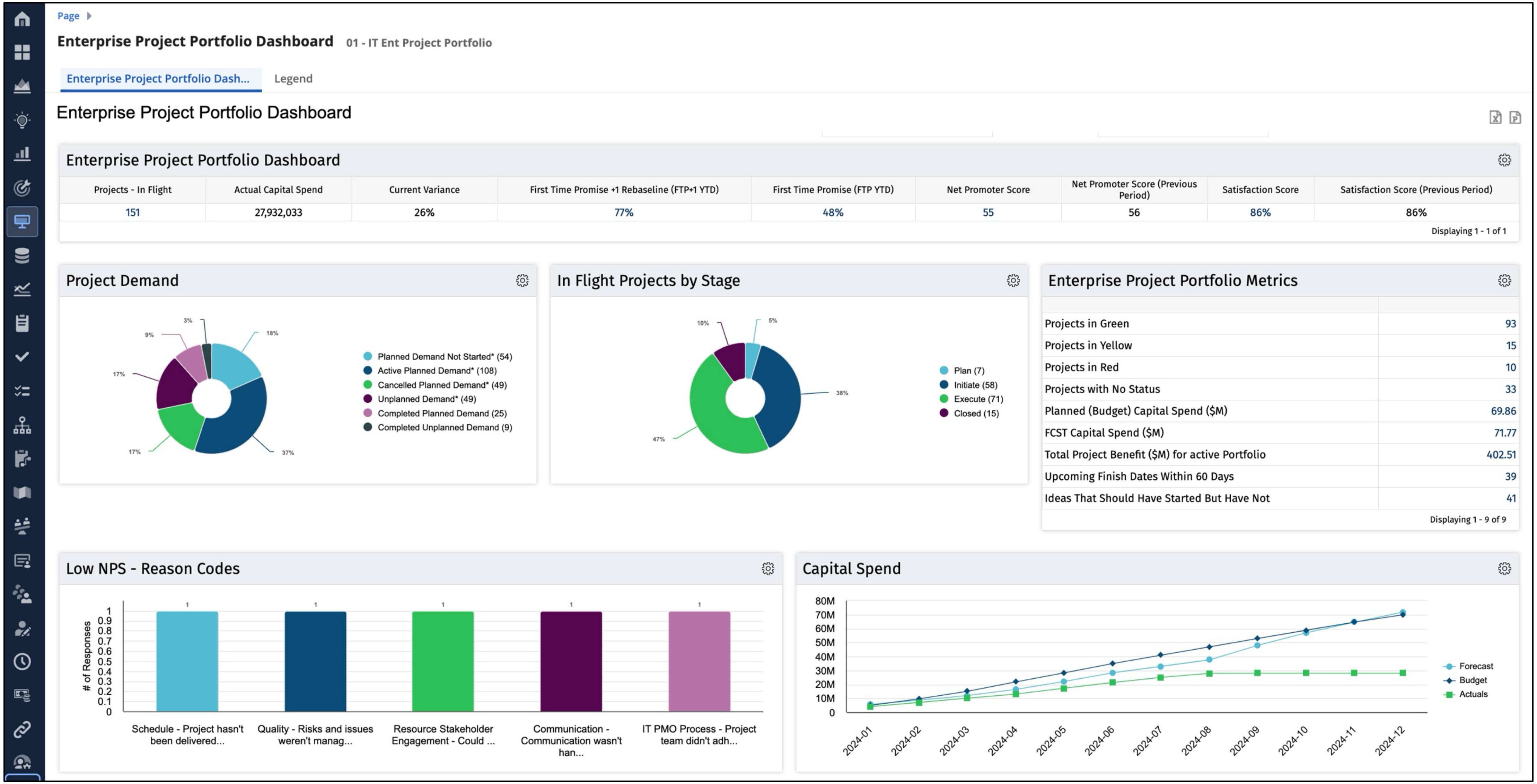


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD
1	HOVER HERE TO READ ABOUT THIS VIEW						January			February			March			April			May			June			July			August		
2	Team	Resource	Investment Ro	Investment	Investment	Inv Type	Allo	Act	Del	Allo	Act	Del	Allo	Act	Del	Allo	Act	Del	Alloc	Actu	Delt	Alloc	Actua	Delta	Alloc	Actu	Delt	Alloc	Actua	De
3	Ent. Jira	Adams, Quentin	NIT-Project Mana	PRJ0055821	SST Enterprise Jira	Product	0.75	0.34	0.41	0.75	0.83	-0.08	0.75	0.70	0.05	0.75	0.87	-0.12	0.75	0.76	-0.01	0.75	0.87	-0.12	0.75	0.76	-0.01	0.75	0.80	-0.05
4	Ent. Jira	Adams, Quentin	NIT-Project Mana	PRJ0058395	SST NIT/KC Jira	Product	0.05	0.00	0.05	0.05	0.00	0.05	0.05	0.00	0.05	0.05	0.00	0.05	0.05	0.00	0.05	0.05	0.00	0.05	0.01	0.00	0.01	0.01	0.00	0.01
5	Ent. Jira	Adams, Quentin	NIT-Project Mana	PRJ0059064	SST Absences 2024	Absence	0.12	0.61	-0.49	0.12	0.08	0.04	0.12	0.18	-0.06	0.12	0.02	0.10	0.12	0.13	-0.01	0.12	0.05	0.07	0.12	0.09	0.03	0.12	0.09	0.03
6	Ent. Jira	Adams, Quentin	NIT-Project Mana	PRJ0059096	SST Administrative 2024	Administrative	0.03	0.04	-0.01	0.03	0.07	-0.04	0.03	0.07	-0.04	0.03	0.08	-0.05	0.03	0.05	-0.02	0.03	0.06	-0.03	0.03	0.06	-0.03	0.03	0.06	-0.03
7	Ent. Jira	Adams, Quentin	NIT-Project Mana	PRJ0059098	SST Professional Development 2024	Administrative	0.03	0.00	0.03	0.03	0.00	0.03	0.03	0.00	0.03	0.03	0.03	0.00	0.03	0.00	0.03	0.03	0.00	0.03	0.03	0.05	-0.02	0.03	0.00	0.03
8	Ent. Jira	Adams, Quentin	NIT-Project Mana	PRJ0059152	SST Core Services 2024	Ops and Maintenance	0.10	0.03	0.07	0.10	0.06	0.04	0.10	0.06	0.04	0.10	0.06	0.04	0.10	0.05	0.05	0.10	0.06	0.04	0.10	0.05	0.05	0.10	0.06	0.04
9	FedPPM	Allen, Carol	NIT-Trainer	PRJ0058375	SST FedPPM	Product	0.50	0.28	0.22	0.50	0.37	0.13	0.45	0.40	0.05	0.45	0.55	-0.10	0.45	0.49	-0.04	0.45	0.50	-0.05	0.45	0.37	0.08	0.40	0.41	-0.01
10	FedPPM	Allen, Carol	NIT-Trainer	PRJ0058384	SST Rally	Product	0.02	0.00	0.02	0.02	0.01	0.01	0.02	0.00	0.02	0.02	0.00	0.02	0.02	0.00	0.02	0.02	0.00	0.02	0.02	0.01	0.01	0.02	0.02	0.00
11	FedPPM	Allen, Carol	NIT-Trainer	PRJ0058395	SST NIT/KC Jira	Product	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
12	FedPPM	Allen, Carol	NIT-Trainer	PRJ0055821	SST Enterprise Jira	Product	0.15	0.29	-0.14	0.15	0.28	-0.13	0.20	0.20	0.00	0.20	0.13	0.07	0.20	0.13	0.08	0.20	0.15	0.05	0.15	0.16	-0.01	0.20	0.14	0.06
13	FedPPM	Allen, Carol	NIT-Trainer	PRJ0059064	SST Absences 2024	Absence	0.12	0.18	-0.06	0.12	0.15	-0.03	0.12	0.26	-0.14	0.12	0.12	0.00	0.12	0.27	-0.15	0.12	0.12	0.00	0.12	0.33	-0.21	0.12	0.15	-0.03
14	FedPPM	Allen, Carol	NIT-Trainer	PRJ0059096	SST Administrative 2024	Administrative	0.03	0.03	0.00	0.03	0.06	-0.03	0.03	0.03	0.00	0.03	0.03	0.00	0.03	0.02	0.01	0.03	0.04	-0.01	0.03	0.01	0.02	0.03	0.06	-0.03
15	FedPPM	Allen, Carol	NIT-Trainer	PRJ0059098	SST Professional Development 2024	Administrative	0.03	0.01	0.02	0.03	0.00	0.03	0.03	0.00	0.03	0.03	0.00	0.03	0.03	0.00	0.03	0.03	0.00	0.03	0.03	0.01	0.02	0.03	0.02	0.01
16	FedPPM	Allen, Carol	NIT-Trainer	PRJ0059152	SST Core Services 2024	Ops and Maintenance	0.10	0.23	-0.13	0.10	0.13	-0.03	0.10	0.13	-0.03	0.10	0.21	-0.11	0.10	0.11	-0.01	0.10	0.23	-0.13	0.10	0.12	-0.02	0.10	0.23	-0.13
17	Ent. Jira	Anderson, Sherree	NIT-Project Mana	PRJ0059064	SST Absences 2024	Absence	0.12	0.09	0.03	0.12	0.10	0.02	0.12	0.00	0.12	0.12	0.05	0.07	0.12	0.26	-0.14	0.12	0.05	0.07	0.12	0.17	-0.05	0.12	0.05	0.07
18	Ent. Jira	Anderson, Sherree	NIT-Project Mana	PRJ0059096	SST Administrative 2024	Administrative	0.03	0.07	-0.04	0.03	0.08	-0.05	0.03	0.04	-0.01	0.03	0.04	-0.01	0.03	0.09	-0.06	0.03	0.00	0.03	0.03	0.04	-0.01	0.03	0.15	-0.12
19	Ent. Jira	Anderson, Sherree	NIT-Project Mana	PRJ0059098	SST Professional Development 2024	Administrative	0.03	0.01	0.02	0.03	0.00	0.03	0.03	0.01	0.02	0.03	0.00	0.03	0.03	0.02	0.01	0.03	0.00	0.03	0.03	0.00	0.03	0.03	0.06	-0.03
20	Ent. Jira	Anderson, Sherree	NIT-Project Mana	PRJ0059152	SST Core Services 2024	Ops and Maintenance	0.10	0.15	-0.05	0.10	0.19	-0.09	0.10	0.44	-0.34	0.10	0.29	-0.19	0.30	0.05	0.25	0.30	0.00	0.30	0.30	0.19	0.11	0.30	0.18	0.12
21	Ent. Jira	Anderson, Sherree	NIT-Project Mana	PRJ0055821	SST Enterprise Jira	Product	0.75	0.68	0.07	0.75	0.64	0.11	0.75	0.52	0.23	0.75	0.63	0.13	0.75	0.58	0.17	0.75	0.95	-0.20	0.75	0.60	0.15	0.75	0.57	0.18
22	FedPPM	Chen, Mei-Jing	NIT-Developer	PRJ0058375	SST FedPPM	Product	0.60	0.73	-0.13	0.60	0.68	-0.08	0.60	0.58	0.02	0.60	0.67	-0.07	0.60	0.61	-0.01	0.60	0.71	-0.11	0.60	0.75	-0.15	0.60	0.82	-0.22
23	FedPPM	Chen, Mei-Jing	NIT-Developer	PRJ0059064	SST Absences 2024	Absence	0.12	0.17	-0.05	0.12	0.11	0.01	0.12	0.24	-0.12	0.12	0.08	0.04	0.12	0.20	-0.08	0.12	0.14	-0.02	0.12	0.10	0.02	0.12	0.05	0.07
24	FedPPM	Chen, Mei-Jing	NIT-Developer	PRJ0059096	SST Administrative 2024	Administrative	0.03	0.00	0.03	0.03	0.03	0.00	0.03	0.01	0.02	0.03	0.05	-0.02	0.03	0.02	0.01	0.03	0.03	0.00	0.03	0.02	0.01	0.03	0.03	0.00
25	FedPPM	Chen, Mei-Jing	NIT-Developer	PRJ0059098	SST Professional Development 2024	Administrative	0.03	0.01	0.02	0.03	0.00	0.03	0.03	0.02	0.01	0.03	0.00	0.03	0.03	0.00	0.03	0.03	0.01	0.02	0.03	0.01	0.02	0.03	0.00	0.03
26	FedPPM	Chen, Mei-Jing	NIT-Developer	PRJ0059152	SST Core Services 2024	Ops and Maintenance	0.10	0.07	0.03	0.10	0.12	-0.02	0.10	0.09	0.01	0.10	0.14	-0.04	0.10	0.13	-0.03	0.10	0.11	-0.01	0.10	0.12	-0.02	0.10	0.09	0.01
27	FedPPM	Chen, Mei-Jing	NIT-Developer	PRJ0055821	SST Enterprise Jira	Product	0.10	0.02	0.08	0.10	0.06	0.04	0.10	0.07	0.03	0.10	0.05	0.05	0.10	0.04	0.06	0.10	0.01	0.09	0.10	0.00	0.10	0.10	0.00	0.10
28	Ent. Jira	Close, Michael	NIT-Customer Su	PRJ0058375	SST FedPPM	Product	0.65	0.51	0.14	0.65	0.57	0.08	0.75	0.48	0.27	0.75	0.70	0.05	0.75	0.61	0.14	0.75	0.50	0.25	0.75	0.70	0.05	0.75	0.53	0.22
29	FedPPM	Close, Michael	NIT-Customer Su	PRJ0059064	SST Absences 2024	Absence	0.12	0.18	-0.06	0.12	0.13	-0.01	0.12	0.25	-0.13	0.12	0.01	0.11	0.12	0.10	0.02	0.12	0.32	-0.20	0.12	0.05	0.07	0.12	0.23	-0.11
30	FedPPM	Close, Michael	NIT-Customer Su	PRJ0059096	SST Administrative 2024	Administrative	0.03	0.08	-0.05	0.03	0.10	-0.07	0.03	0.02	0.01	0.03	0.02	0.01	0.03	0.04	-0.01	0.03	0.03	0.00	0.03	0.03	0.00	0.03	0.02	0.01
31	FedPPM	Close, Michael	NIT-Customer Su	PRJ0059152	SST Core Services 2024	Ops and Maintenance	0.10	0.17	-0.07	0.10	0.17	-0.07	0.10	0.21	-0.11	0.10	0.22	-0.12	0.10	0.20	-0.10	0.10	0.11	-0.01	0.10	0.19	-0.09	0.10	0.18	-0.08
32	FedPPM	Close, Michael	NIT-Customer Su	PRJ0059098	SST Professional Development 2024	Administrative	0.03	0.05	-0.02	0.03	0.04	-0.01	0.03	0.04	-0.01	0.03	0.04	-0.01	0.03	0.06	-0.03	0.03	0.04	-0.01	0.03	0.03	0.00	0.03	0.04	-0.01

Other Client Examples

Lulu Wang / Ross Hensel

Portlet Based – PMO Dashboard


Page
Enterprise Project Portfolio Dash...
Legend
Project Demand
3%
9%
18%
17%
17%
37%
● Planned Demand Not Started* (54)
● Active Planned Demand* (108)
● Cancelled Planned Demand* (49)
● Unplanned Demand* (49)
● Completed Planned Demand (25)
● Completed Unplanned Demand (9)
In Flight Projects by Stage
10%
5%
38%
47%
● Plan (7)
● Initiate (58)
● Execute (71)
● Closed (15)
Low NPS - Reason Codes
# of Responses
1
0.9
0.8
0.7
0.6
0.5
0.4
0.3
0.2
0.1
0
1
1
1
1
1
Schedule - Project hasn't been delivered...
Quality - Risks and issues weren't manag...
Resource Stakeholder Engagement - Could ...
Communication - Communication wasn't han...
IT PMO Process - Project team didn't adh...
Capital Spend
80M
70M
60M
50M
40M
30M
20M
10M
0
2024-01
2024-02
2024-03
2024-04
2024-05
2024-06
2024-07
2024-08
2024-09
2024-10
2024-11
2024-12
Forecast
Budget
Actuals

Enterprise Project Portfolio Dashboard 01 - IT Ent Project Portfolio

Enterprise Project Portfolio Dashboard

Enterprise Project Portfolio Dashboard

Projects - In Flight	Actual Capital Spend	Current Variance	First Time Promise +1 Rebaseline (FTP+1 YTD)	First Time Promise (FTP YTD)	Net Promoter Score	Net Promoter Score (Previous Period)	Satisfaction Score	Satisfaction Score (Previous Period)
151	27,932,033	26%	77%	48%	55	56	86%	86%

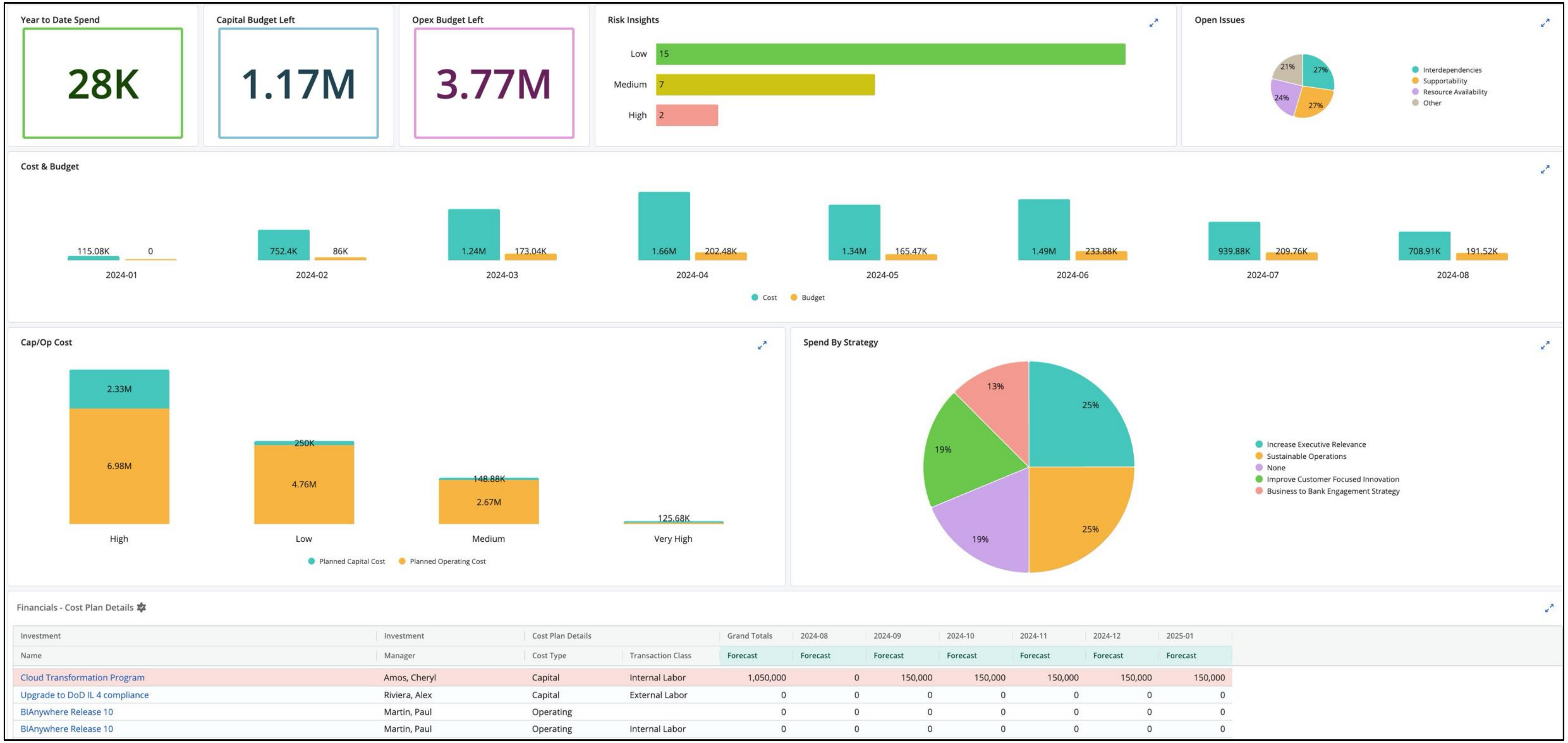
Displaying 1 - 1 of 1

Enterprise Project Portfolio Metrics

Projects in Green	93
Projects in Yellow	15
Projects in Red	10
Projects with No Status	33
Planned (Budget) Capital Spend ($M)	69.86
FCST Capital Spend ($M)	71.77
Total Project Benefit ($M) for active Portfolio	402.51
Upcoming Finish Dates Within 60 Days	39
Ideas That Should Have Started But Have Not	41

Displaying 1 - 9 of 9

Canvas with Widgets



Year to Date Spend
28K

Capital Budget Left
1.17M

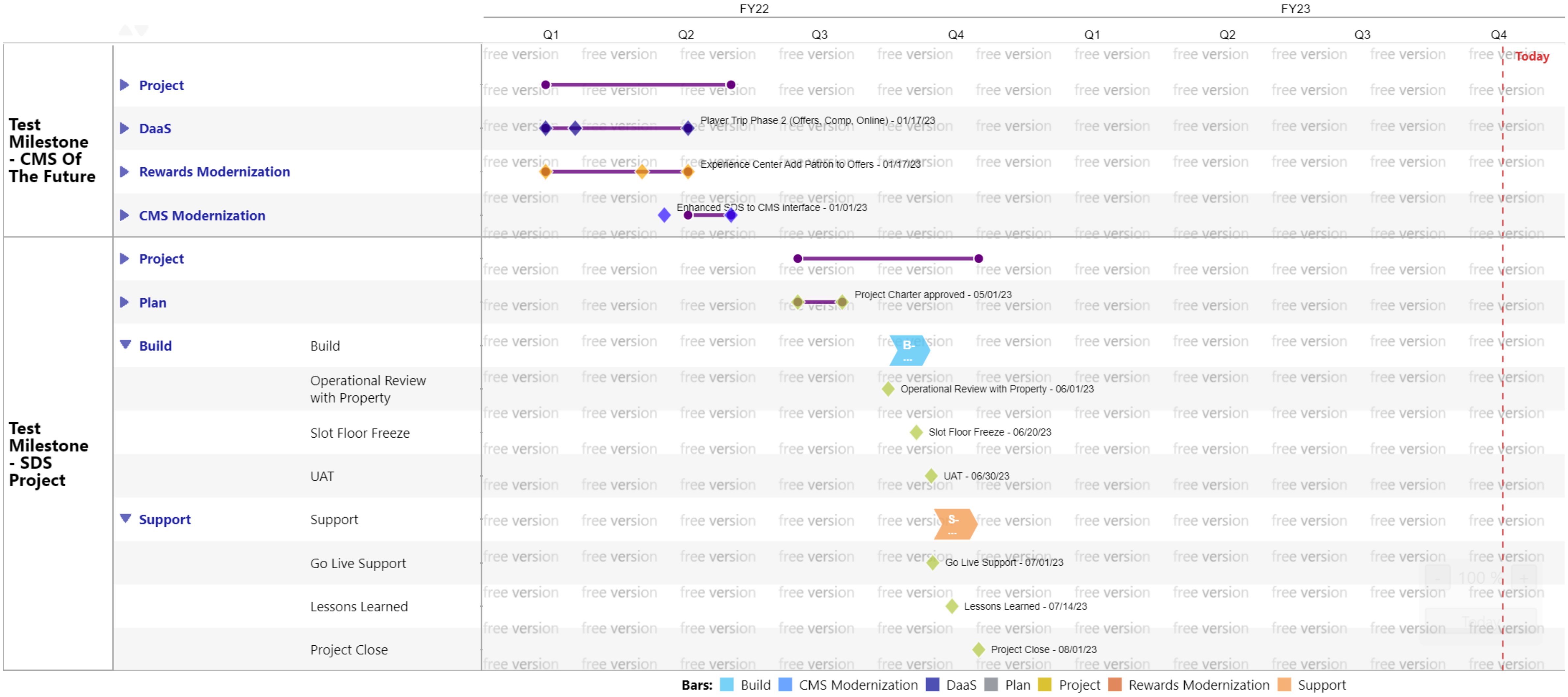
Opex Budget Left
3.77M

Risk Insights
Low
15
Medium
7
High
2
Open Issues
21%
27%
24%
27%
Interdependencies
Supportability
Resource Availability
Other
Cost & Budget
115.08K
0
2024-01
752.4K
86K
2024-02
1.24M
173.04K
2024-03
1.66M
202.48K
2024-04
1.34M
165.47K
2024-05
1.49M
233.88K
2024-06
939.88K
209.76K
2024-07
708.91K
191.52K
2024-08
Cost
Budget
Cap/Op Cost
2.33M
6.98M
High
250K
4.76M
Low
148.88K
2.67M
Medium
125.68K
Very High
Planned Capital Cost
Planned Operating Cost
Spend By Strategy
13%
25%
19%
19%
25%
Increase Executive Relevance
Sustainable Operations
None
Improve Customer Focused Innovation
Business to Bank Engagement Strategy

Financials - Cost Plan Details

Investment	Investment	Cost Plan Details		Grand Totals	2024-08	2024-09	2024-10	2024-11	2024-12	2025-01
Name	Manager	Cost Type	Transaction Class	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
Cloud Transformation Program	Amos, Cheryl	Capital	Internal Labor	1,050,000	0	150,000	150,000	150,000	150,000	150,000
Upgrade to DoD IL 4 compliance	Riviera, Alex	Capital	External Labor	0	0	0	0	0	0	0
BIAnywhere Release 10	Martin, Paul	Operating		0	0	0	0	0	0	0
BIAnywhere Release 10	Martin, Paul	Operating	Internal Labor	0	0	0	0	0	0	0

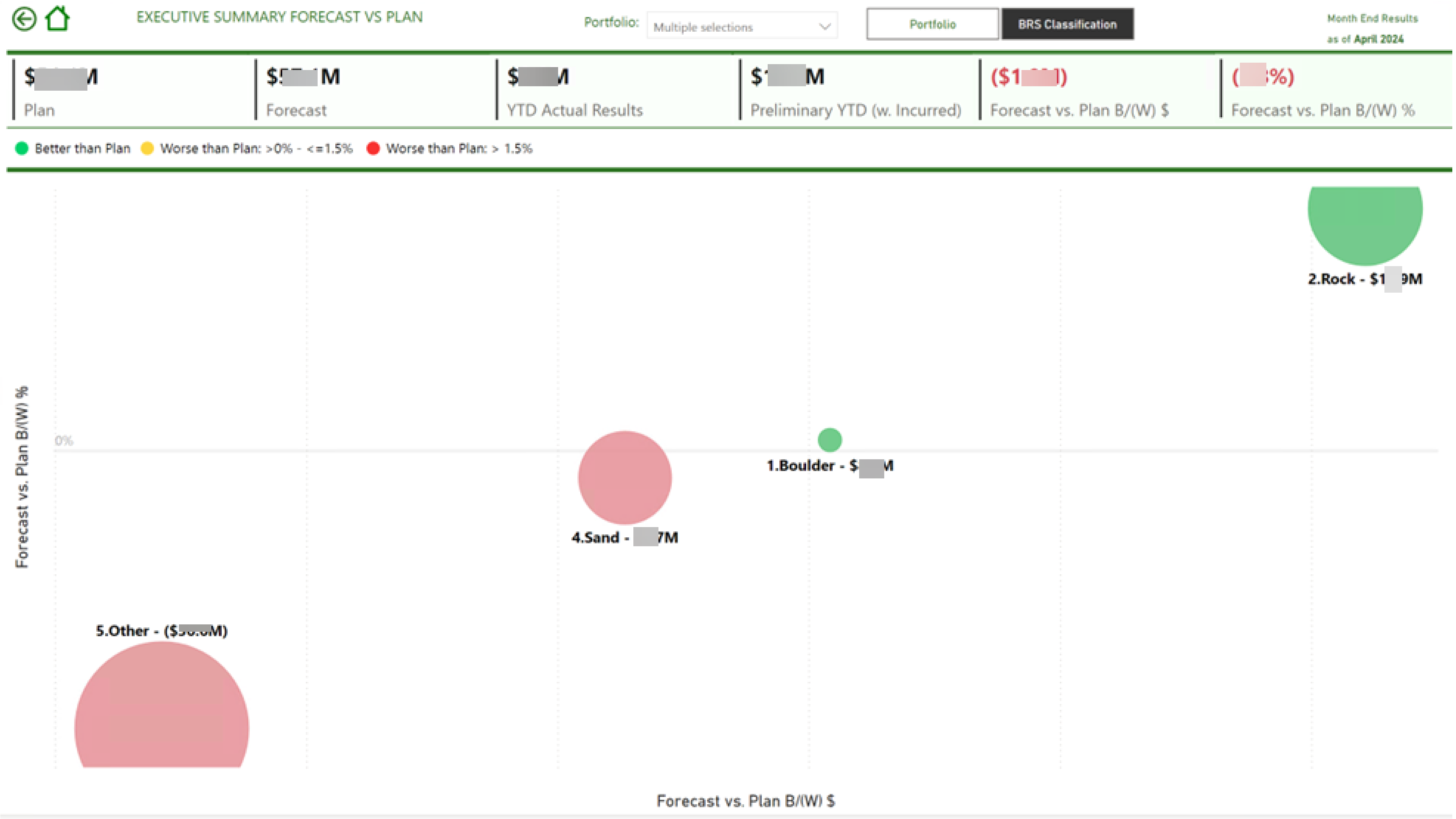
Gantt – Project/Phase



Test Milestone - CMS Of The Future	Project		
	DaaS		Player Trip Phase 2 (Offers, Comp, Online) - 01/17/23
	Rewards Modernization		Experience Center Add Patron to Offers - 01/17/23
	CMS Modernization		Enhanced SDS to CMS interface - 01/01/23
Test Milestone - SDS Project	Project		
	Plan		Project Charter approved - 05/01/23
	Build	Build	
		Operational Review with Property	Operational Review with Property - 06/01/23
		Slot Floor Freeze	Slot Floor Freeze - 06/20/23
		UAT	UAT - 06/30/23
	Support	Support	
		Go Live Support	Go Live Support - 07/01/23
		Lessons Learned	Lessons Learned - 07/14/23
		Project Close	Project Close - 08/01/23

Bars: Build CMS Modernization DaaS Plan Project Rewards Modernization Support

Forecast vs Plan



EXECUTIVE SUMMARY FORECAST VS PLAN

Portfolio: Multiple selections

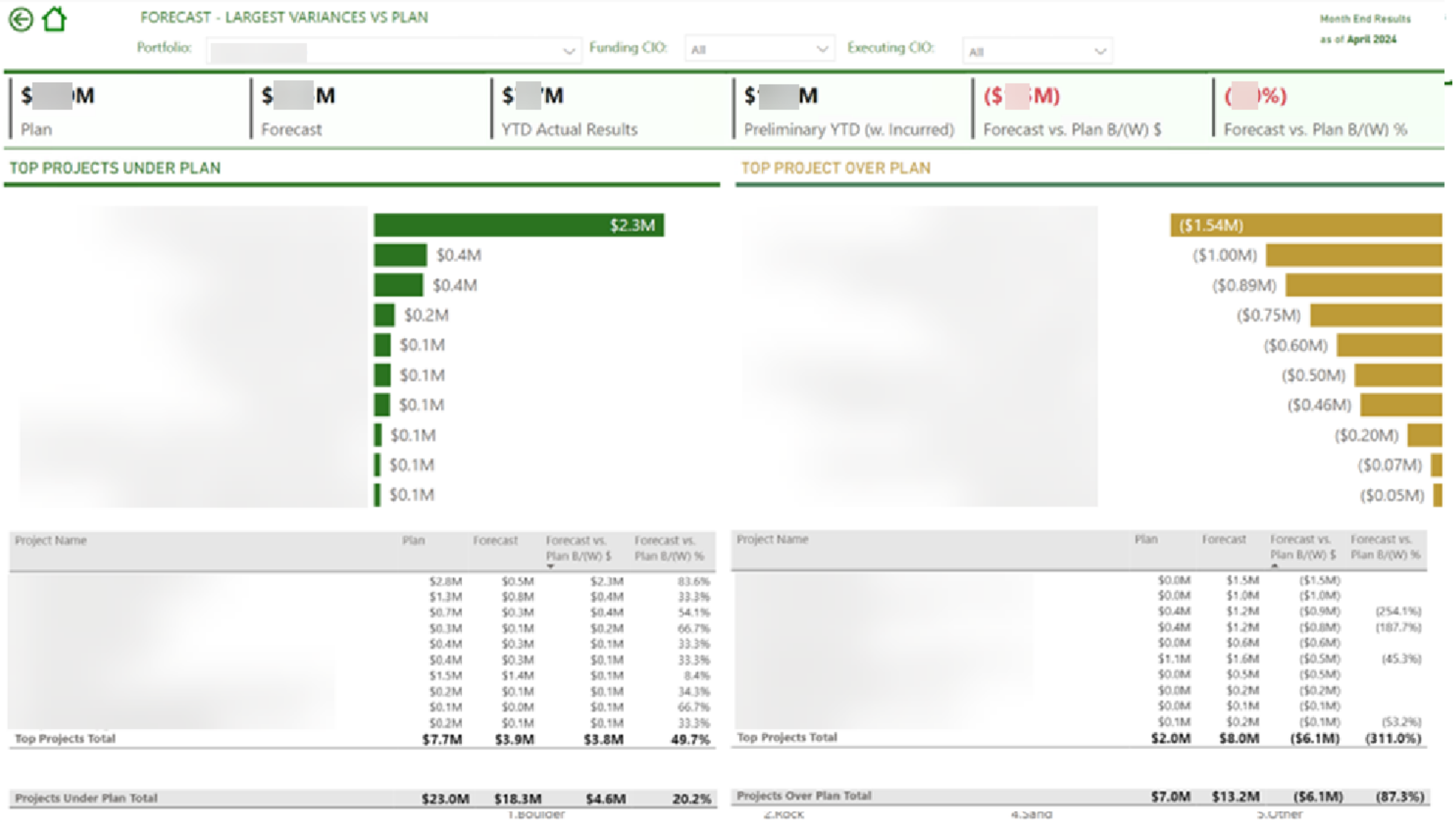
Month End Results as of April 2024

$[redacted]M	$5[redacted]M	$[redacted]M	$1[redacted]M	($1[redacted])	([redacted]%)
Plan	Forecast	YTD Actual Results	Preliminary YTD (w. Incurred)	Forecast vs. Plan B/(W) $	Forecast vs. Plan B/(W) %

● Better than Plan ● Worse than Plan: >0% - <=1.5% ● Worse than Plan: > 1.5%

Portfolio
BRS Classification
2.Rock - $1[redacted]9M
0%
1.Boulder - $[redacted]M
4.Sand - [redacted]7M
5.Other - ($[redacted]M)
Forecast vs. Plan B/(W) %
Forecast vs. Plan B/(W) $

Forecast vs Plan - Largest Variance



FORECAST - LARGEST VARIANCES VS PLAN

Portfolio: [redacted] Funding CIO: All Executing CIO: All

Month End Results
as of **April 2024**

$[redacted]M	**$[redacted]M**	**$[redacted]M**	**$[redacted]M**	**($[redacted]M)**	**([redacted]%)**
Plan	Forecast	YTD Actual Results	Preliminary YTD (w. Incurred)	Forecast vs. Plan B/(W) $	Forecast vs. Plan B/(W) %

TOP PROJECTS UNDER PLAN

[redacted]
$2.3M
$0.4M
$0.4M
$0.2M
$0.1M
$0.1M
$0.1M
$0.1M
$0.1M
$0.1M

Project Name	Plan	Forecast	Forecast vs. Plan B/(W) $	Forecast vs. Plan B/(W) %
[redacted]	$2.8M	$0.5M	$2.3M	83.6%
[redacted]	$1.3M	$0.8M	$0.4M	33.3%
[redacted]	$0.7M	$0.3M	$0.4M	54.1%
[redacted]	$0.3M	$0.1M	$0.2M	66.7%
[redacted]	$0.4M	$0.3M	$0.1M	33.3%
[redacted]	$0.4M	$0.3M	$0.1M	33.3%
[redacted]	$1.5M	$1.4M	$0.1M	8.4%
[redacted]	$0.2M	$0.1M	$0.1M	34.3%
[redacted]	$0.1M	$0.0M	$0.1M	66.7%
[redacted]	$0.2M	$0.1M	$0.1M	33.3%
Top Projects Total	**$7.7M**	**$3.9M**	**$3.8M**	**49.7%**
Projects Under Plan Total	**$23.0M**	**$18.3M**	**$4.6M**	**20.2%**

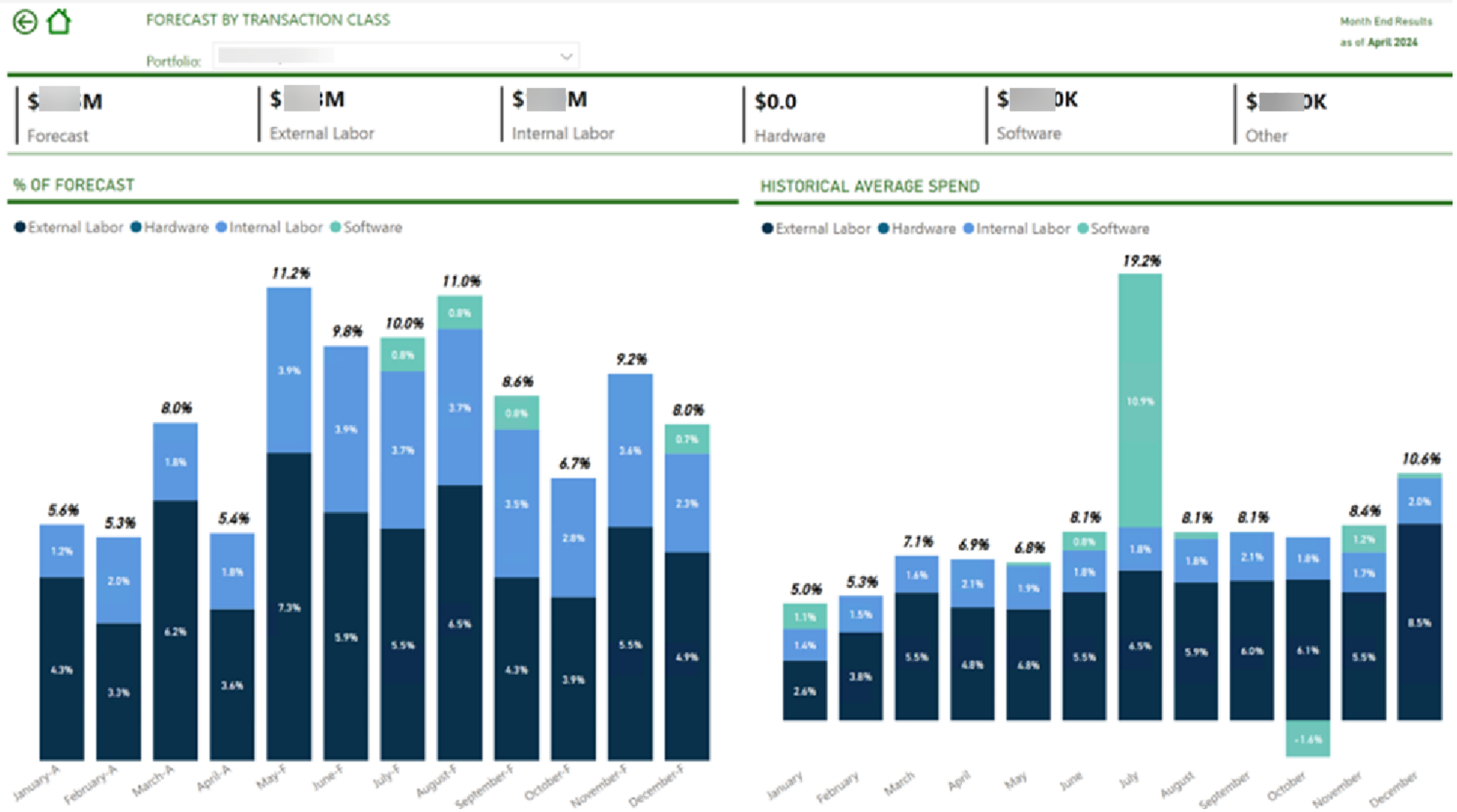
TOP PROJECT OVER PLAN

[redacted]
($1.54M)
($1.00M)
($0.89M)
($0.75M)
($0.60M)
($0.50M)
($0.46M)
($0.20M)
($0.07M)
($0.05M)

Project Name	Plan	Forecast	Forecast vs. Plan B/(W) $	Forecast vs. Plan B/(W) %
[redacted]	$0.0M	$1.5M	($1.5M)	
[redacted]	$0.0M	$1.0M	($1.0M)	
[redacted]	$0.4M	$1.2M	($0.9M)	(254.1%)
[redacted]	$0.4M	$1.2M	($0.8M)	(187.7%)
[redacted]	$0.0M	$0.6M	($0.6M)	
[redacted]	$1.1M	$1.6M	($0.5M)	(45.3%)
[redacted]	$0.0M	$0.5M	($0.5M)	
[redacted]	$0.0M	$0.2M	($0.2M)	
[redacted]	$0.0M	$0.1M	($0.1M)	
[redacted]	$0.1M	$0.2M	($0.1M)	(53.2%)
Top Projects Total	**$2.0M**	**$8.0M**	**($6.1M)**	**(311.0%)**
Projects Over Plan Total	**$7.0M**	**$13.2M**	**($6.1M)**	**(87.3%)**

1.Boulder
2.Rock
4.Sand
5.Other

Forecast by Transaction Class



FORECAST BY TRANSACTION CLASS

Portfolio: [redacted]

Month End Results
as of April 2024

$[redacted]M	$[redacted]M	$[redacted]M	$0.0	$[redacted]K	$[redacted]K
Forecast	External Labor	Internal Labor	Hardware	Software	Other

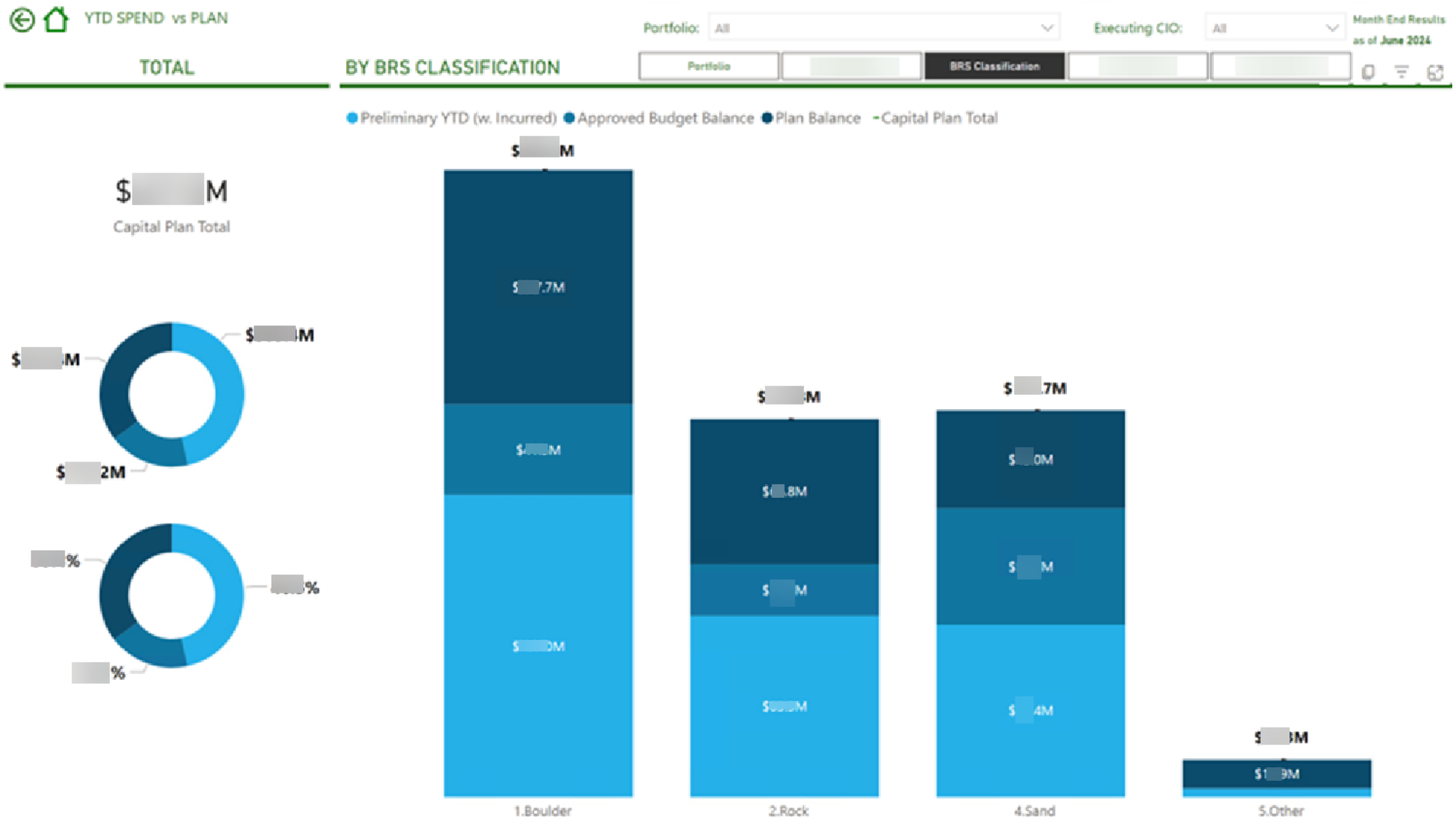
% OF FORECAST

● External Labor ● Hardware ● Internal Labor ● Software
5.6%
1.2%
4.3%
5.3%
2.0%
3.3%
8.0%
1.8%
6.2%
5.4%
1.8%
3.6%
11.2%
3.9%
7.3%
9.8%
3.9%
5.9%
10.0%
0.8%
3.7%
5.5%
11.0%
0.8%
3.7%
6.5%
8.6%
0.8%
3.5%
4.3%
6.7%
2.8%
3.9%
9.2%
3.6%
5.5%
8.0%
0.7%
2.3%
4.9%
January-A
February-A
March-A
April-A
May-F
June-F
July-F
August-F
September-F
October-F
November-F
December-F

HISTORICAL AVERAGE SPEND

● External Labor ● Hardware ● Internal Labor ● Software
5.0%
1.1%
1.4%
2.6%
5.3%
1.5%
3.8%
7.1%
1.6%
5.5%
6.9%
2.1%
4.8%
6.8%
1.9%
4.8%
8.1%
0.8%
1.8%
5.5%
19.2%
10.9%
1.8%
6.5%
8.1%
1.8%
5.9%
8.1%
2.1%
6.0%
1.8%
6.1%
-1.6%
8.4%
1.2%
1.7%
5.5%
10.6%
2.0%
8.5%
January
February
March
April
May
June
July
August
September
October
November
December

YTD Spend vs Plan



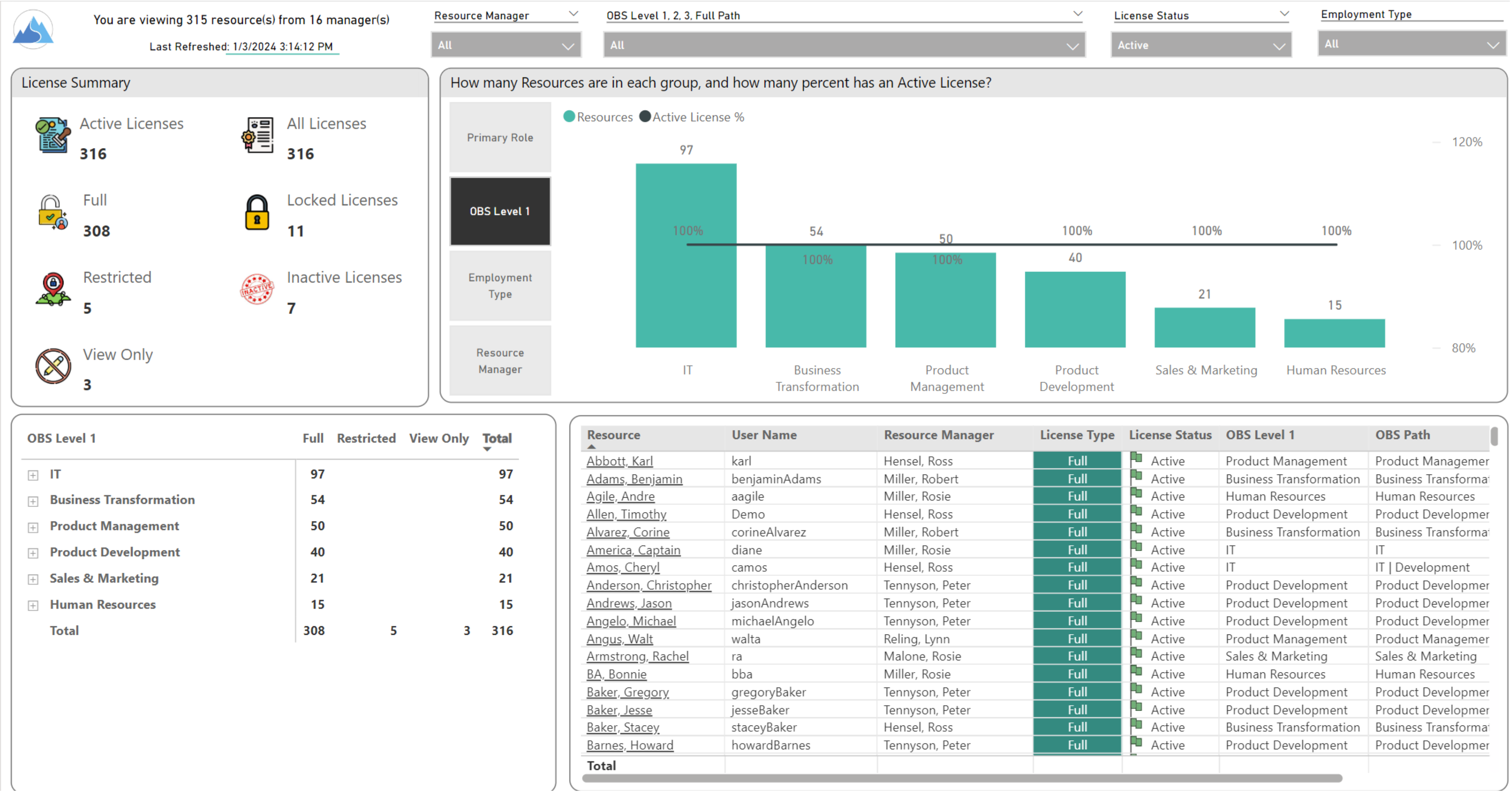
Portfolio: All

Executing CIO: All

Month End Results as of June 2024

YTD SPEND vs PLAN
TOTAL
BY BRS CLASSIFICATION
Portfolio
BRS Classification
● Preliminary YTD (w. Incurred) ● Approved Budget Balance ● Plan Balance - Capital Plan Total
$[redacted]M
Capital Plan Total
$[redacted]M
$[redacted]M
$[redacted]2M
[redacted]%
[redacted]%
[redacted]%
$[redacted]M
$[redacted]7.7M
$[redacted]M
$[redacted]M
$[redacted]M
$[redacted].8M
$[redacted]M
$[redacted]M
$[redacted].7M
$[redacted]0M
$[redacted]M
$[redacted]4M
$[redacted]3M
$1[redacted]9M
1.Boulder
2.Rock
4.Sand
5.Other

License Tracking



You are viewing 315 resource(s) from 16 manager(s)

Last Refreshed: 1/3/2024 3:14:12 PM

Resource Manager: All

OBS Level 1, 2, 3, Full Path: All

License Status: Active

Employment Type: All

License Summary

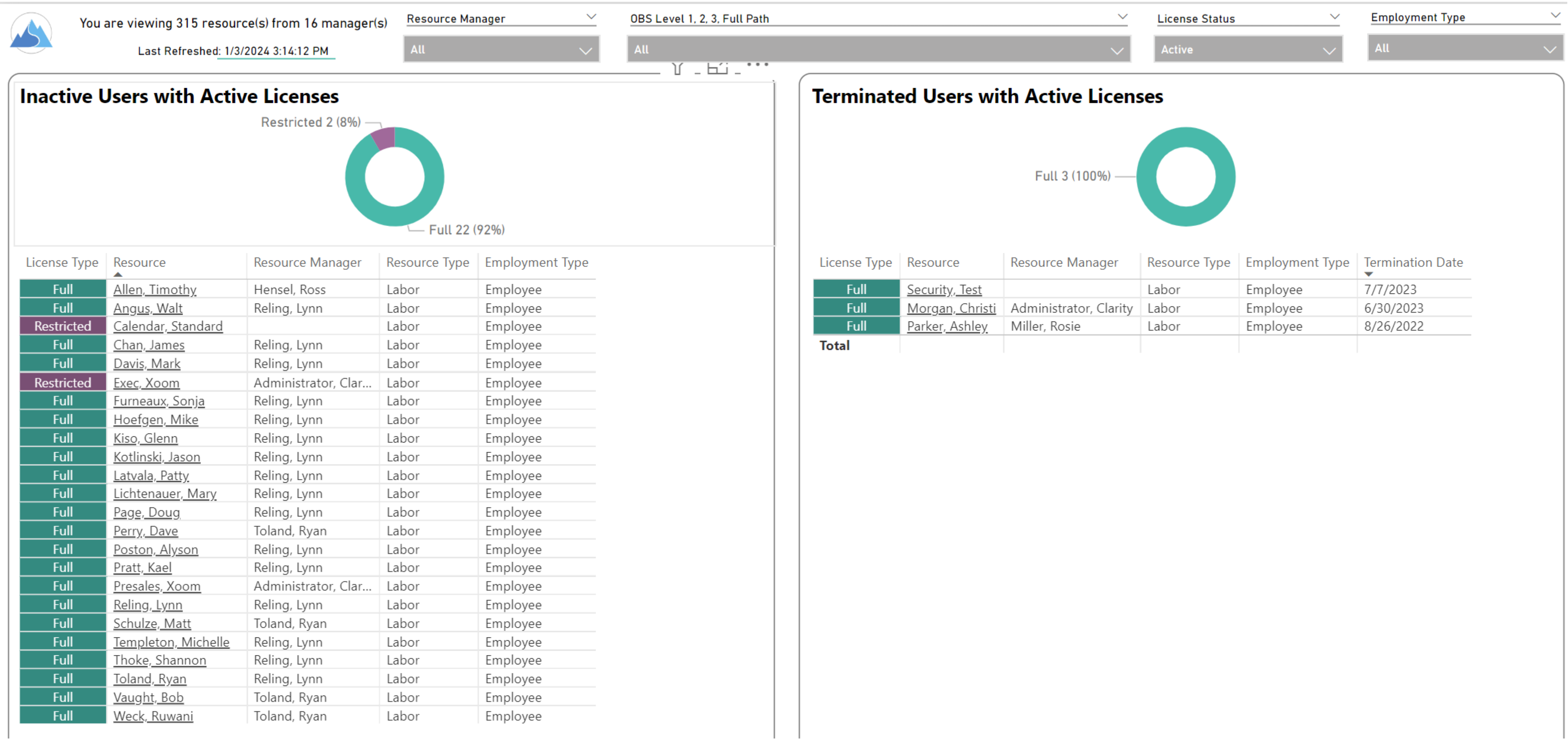
Active Licenses 316	All Licenses 316
Full 308	Locked Licenses 11
Restricted 5	Inactive Licenses 7
View Only 3	

How many Resources are in each group, and how many percent has an Active License?

OBS Level 1	Full	Restricted	View Only	Total
IT	97			97
Business Transformation	54			54
Product Management	50			50
Product Development	40			40
Sales & Marketing	21			21
Human Resources	15			15
Total	308	5	3	316

Resource	User Name	Resource Manager	License Type	License Status	OBS Level 1	OBS Path
Abbott, Karl	karl	Hensel, Ross	Full	Active	Product Management	Product Managemer
Adams, Benjamin	benjaminAdams	Miller, Robert	Full	Active	Business Transformation	Business Transforma
Agile, Andre	aagile	Miller, Rosie	Full	Active	Human Resources	Human Resources
Allen, Timothy	Demo	Hensel, Ross	Full	Active	Product Development	Product Developmer
Alvarez, Corine	corineAlvarez	Miller, Robert	Full	Active	Business Transformation	Business Transforma
America, Captain	diane	Miller, Rosie	Full	Active	IT	IT
Amos, Cheryl	camos	Hensel, Ross	Full	Active	IT	IT | Development
Anderson, Christopher	christopherAnderson	Tennyson, Peter	Full	Active	Product Development	Product Developmer
Andrews, Jason	jasonAndrews	Tennyson, Peter	Full	Active	Product Development	Product Developmer
Angelo, Michael	michaelAngelo	Tennyson, Peter	Full	Active	Product Development	Product Developmer
Angus, Walt	walta	Reling, Lynn	Full	Active	Product Management	Product Managemer
Armstrong, Rachel	ra	Malone, Rosie	Full	Active	Sales & Marketing	Sales & Marketing
BA, Bonnie	bba	Miller, Rosie	Full	Active	Human Resources	Human Resources
Baker, Gregory	gregoryBaker	Tennyson, Peter	Full	Active	Product Development	Product Developmer
Baker, Jesse	jesseBaker	Tennyson, Peter	Full	Active	Product Development	Product Developmer
Baker, Stacey	staceyBaker	Hensel, Ross	Full	Active	Business Transformation	Business Transforma
Barnes, Howard	howardBarnes	Tennyson, Peter	Full	Active	Product Development	Product Developmer
Total						

License Exception



You are viewing 315 resource(s) from 16 manager(s)

Last Refreshed: 1/3/2024 3:14:12 PM

Resource Manager: All

OBS Level 1, 2, 3, Full Path: All

License Status: Active

Employment Type: All

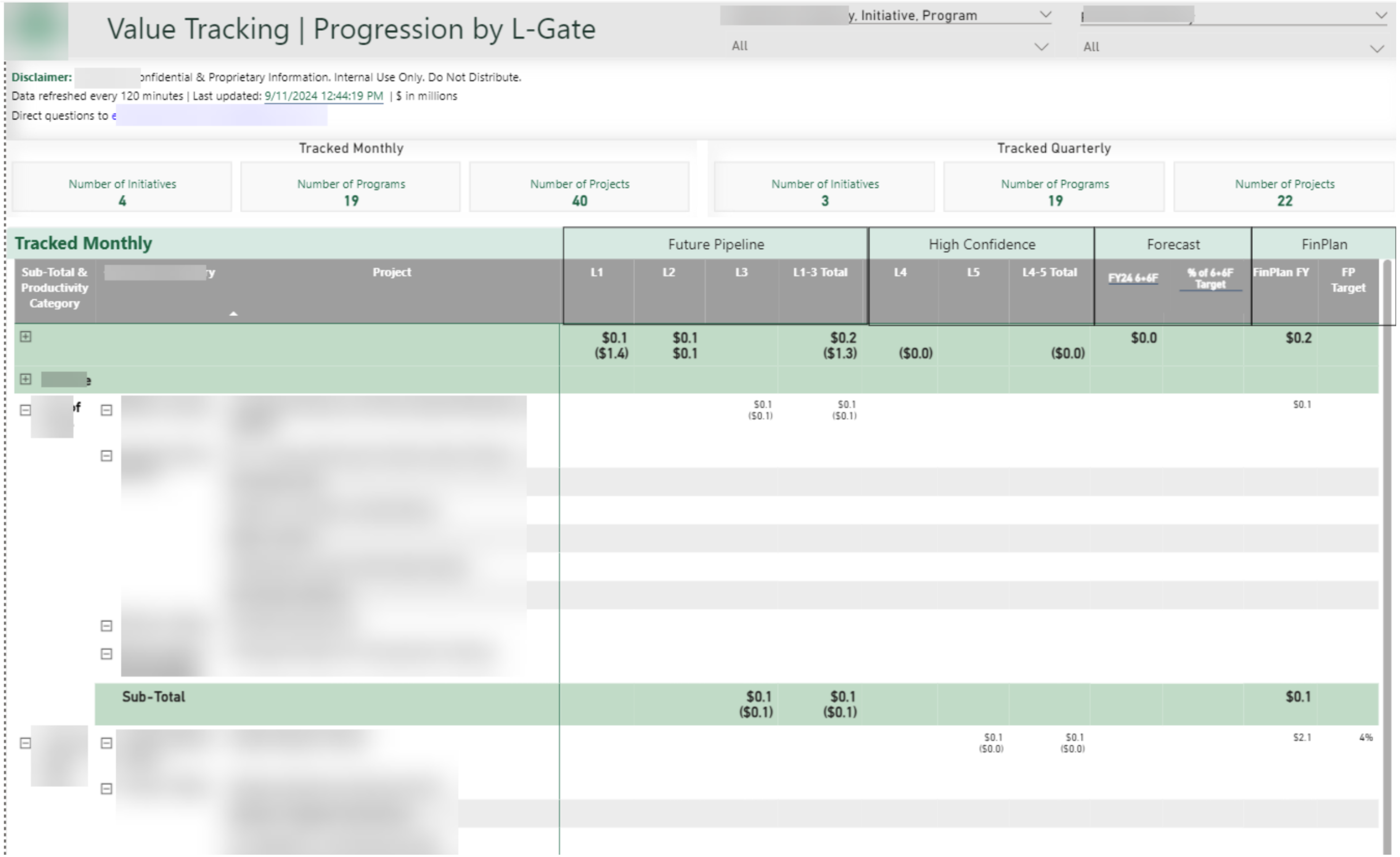
Inactive Users with Active Licenses

License Type	Resource	Resource Manager	Resource Type	Employment Type
Full	Allen, Timothy	Hensel, Ross	Labor	Employee
Full	Angus, Walt	Reling, Lynn	Labor	Employee
Restricted	Calendar, Standard		Labor	Employee
Full	Chan, James	Reling, Lynn	Labor	Employee
Full	Davis, Mark	Reling, Lynn	Labor	Employee
Restricted	Exec, Xoom	Administrator, Clar...	Labor	Employee
Full	Furneaux, Sonja	Reling, Lynn	Labor	Employee
Full	Hoefgen, Mike	Reling, Lynn	Labor	Employee
Full	Kiso, Glenn	Reling, Lynn	Labor	Employee
Full	Kotlinski, Jason	Reling, Lynn	Labor	Employee
Full	Latvala, Patty	Reling, Lynn	Labor	Employee
Full	Lichtenauer, Mary	Reling, Lynn	Labor	Employee
Full	Page, Doug	Reling, Lynn	Labor	Employee
Full	Perry, Dave	Toland, Ryan	Labor	Employee
Full	Poston, Alyson	Reling, Lynn	Labor	Employee
Full	Pratt, Kael	Reling, Lynn	Labor	Employee
Full	Presales, Xoom	Administrator, Clar...	Labor	Employee
Full	Reling, Lynn	Reling, Lynn	Labor	Employee
Full	Schulze, Matt	Toland, Ryan	Labor	Employee
Full	Templeton, Michelle	Reling, Lynn	Labor	Employee
Full	Thoke, Shannon	Reling, Lynn	Labor	Employee
Full	Toland, Ryan	Reling, Lynn	Labor	Employee
Full	Vaught, Bob	Toland, Ryan	Labor	Employee
Full	Weck, Ruwani	Toland, Ryan	Labor	Employee

Terminated Users with Active Licenses

License Type	Resource	Resource Manager	Resource Type	Employment Type	Termination Date
Full	Security, Test		Labor	Employee	7/7/2023
Full	Morgan, Christi	Administrator, Clarity	Labor	Employee	6/30/2023
Full	Parker, Ashley	Miller, Rosie	Labor	Employee	8/26/2022
Total					

Value Tracking by Stage Gate



Value Tracking | Progression by L-Gate

[redacted]y, Initiative, Program ⌄
All ⌄

[redacted] ⌄
All ⌄

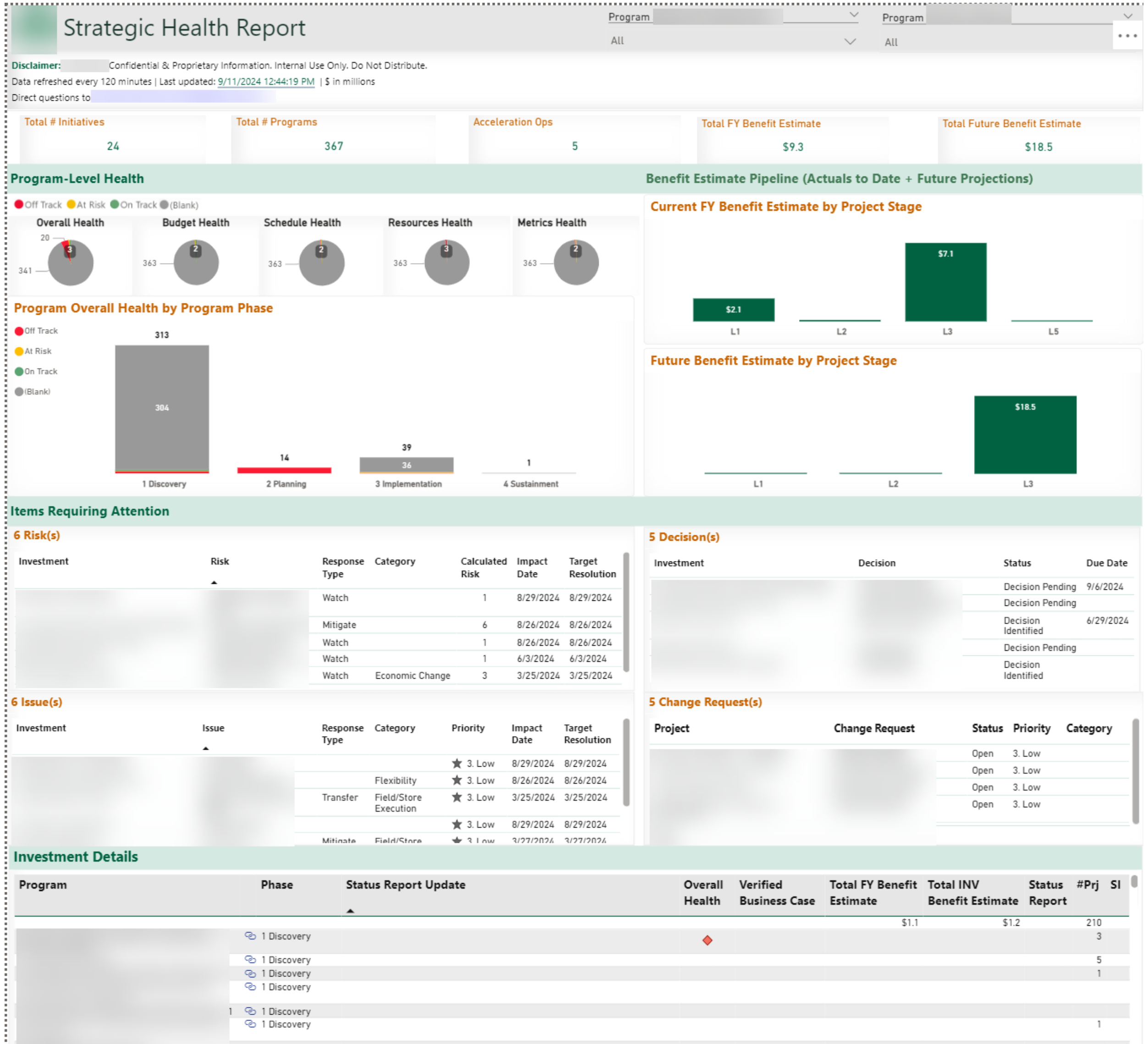
Disclaimer: [redacted]onfidential & Proprietary Information. Internal Use Only. Do Not Distribute.
Data refreshed every 120 minutes | Last updated: 9/11/2024 12:44:19 PM | $ in millions
Direct questions to e[redacted]

Tracked Monthly			Tracked Quarterly		
Number of Initiatives 4	Number of Programs 19	Number of Projects 40	Number of Initiatives 3	Number of Programs 19	Number of Projects 22

Tracked Monthly

			Future Pipeline				High Confidence			Forecast		FinPlan	
Sub-Total & Productivity Category	[redacted]y	Project	L1	L2	L3	L1-3 Total	L4	L5	L4-5 Total	FY24 6+6F	% of 6+6F Target	FinPlan FY	FP Target
⊞			$0.1 ($1.4)	$0.1 $0.1		$0.2 ($1.3)	($0.0)		($0.0)	$0.0		$0.2	
⊞ [redacted]e													
⊟ [redacted]f	⊟ [redacted]	[redacted]			$0.1 ($0.1)	$0.1 ($0.1)						$0.1	
	⊟ [redacted]	[redacted]											
	⊟ [redacted]	[redacted]											
	⊟ [redacted]	[redacted]											
	Sub-Total				$0.1 ($0.1)	$0.1 ($0.1)						$0.1	
⊟ [redacted]	⊟ [redacted]	[redacted]						$0.1 ($0.0)	$0.1 ($0.0)			$2.1	4%
	⊟ [redacted]	[redacted]											

Strategic Health



Strategic Health Report
Program [redacted]
All
Program [redacted]
All

Disclaimer: [redacted] Confidential & Proprietary Information. Internal Use Only. Do Not Distribute.
Data refreshed every 120 minutes | Last updated: 9/11/2024 12:44:19 PM | $ in millions
Direct questions to [redacted]

Total # Initiatives	Total # Programs	Acceleration Ops	Total FY Benefit Estimate	Total Future Benefit Estimate
24	367	5	$9.3	$18.5

Program-Level Health

● Off Track ● At Risk ● On Track ● (Blank)
Overall Health
20
3
341
Budget Health
2
363
Schedule Health
2
363
Resources Health
3
363
Metrics Health
2
363

Program Overall Health by Program Phase

● Off Track
● At Risk
● On Track
● (Blank)
313
304
1 Discovery
14
2 Planning
39
36
3 Implementation
1
4 Sustainment

Benefit Estimate Pipeline (Actuals to Date + Future Projections)

Current FY Benefit Estimate by Project Stage

$2.1
L1
L2
$7.1
L3
L5

Future Benefit Estimate by Project Stage

Items Requiring Attention

6 Risk(s)

Investment	Risk	Response Type	Category	Calculated Risk	Impact Date	Target Resolution
[redacted]	[redacted]	Watch		1	8/29/2024	8/29/2024
[redacted]	[redacted]	Mitigate		6	8/26/2024	8/26/2024
[redacted]	[redacted]	Watch		1	8/26/2024	8/26/2024
[redacted]	[redacted]	Watch		1	6/3/2024	6/3/2024
[redacted]	[redacted]	Watch	Economic Change	3	3/25/2024	3/25/2024

5 Decision(s)

Investment	Decision	Status	Due Date
[redacted]	[redacted]	Decision Pending	9/6/2024
[redacted]	[redacted]	Decision Pending	
[redacted]	[redacted]	Decision Identified	6/29/2024
[redacted]	[redacted]	Decision Pending	
[redacted]	[redacted]	Decision Identified	

6 Issue(s)

Investment	Issue	Response Type	Category	Priority	Impact Date	Target Resolution
[redacted]	[redacted]			★ 3. Low	8/29/2024	8/29/2024
[redacted]	[redacted]		Flexibility	★ 3. Low	8/26/2024	8/26/2024
[redacted]	[redacted]	Transfer	Field/Store Execution	★ 3. Low	3/25/2024	3/25/2024
[redacted]	[redacted]			★ 3. Low	8/29/2024	8/29/2024
[redacted]	[redacted]	Mitigate	Field/Store	★ 3. Low	3/27/2024	3/27/2024

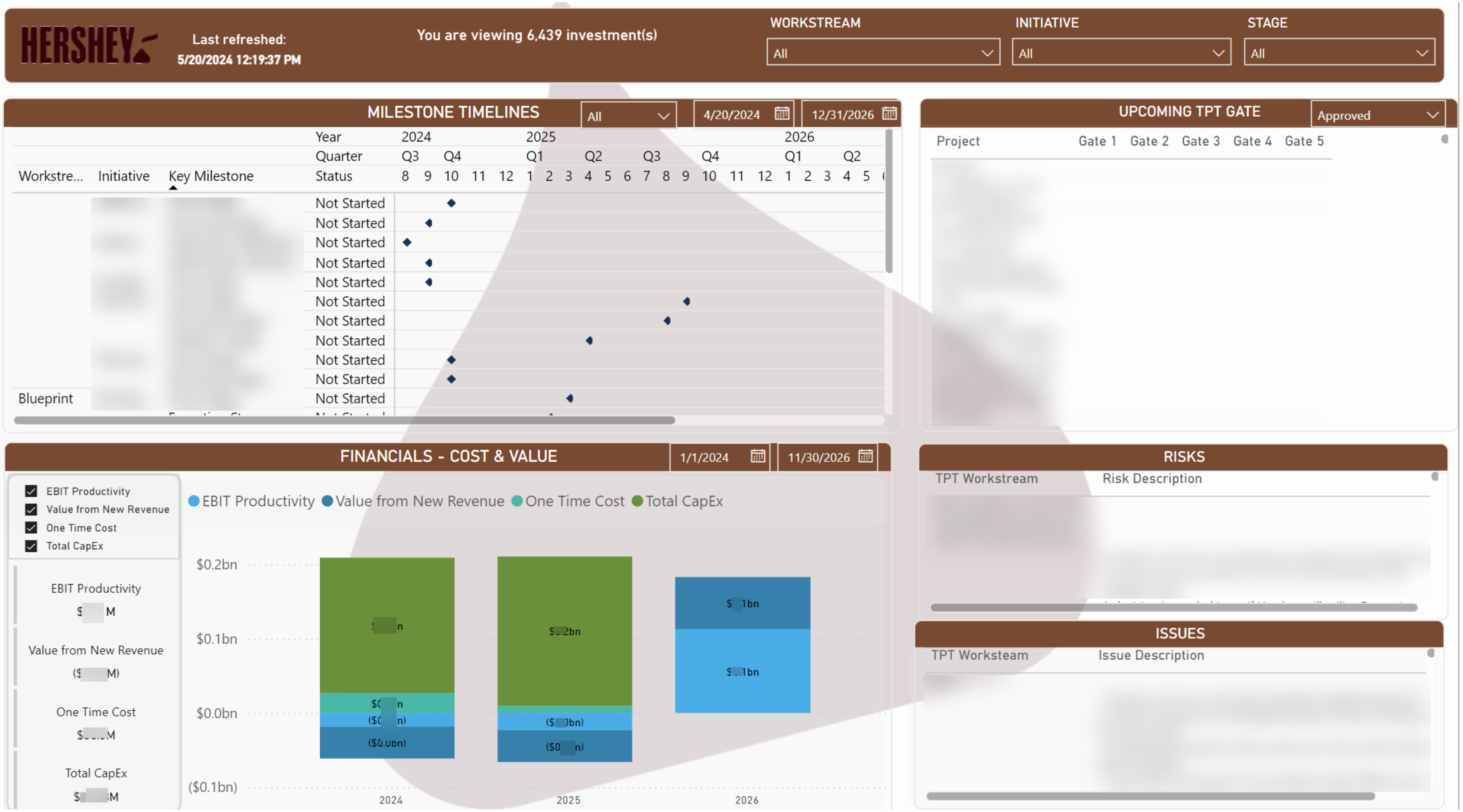
5 Change Request(s)

Project	Change Request	Status	Priority	Category
[redacted]	[redacted]	Open	3. Low	
[redacted]	[redacted]	Open	3. Low	
[redacted]	[redacted]	Open	3. Low	
[redacted]	[redacted]	Open	3. Low	

Investment Details

Program	Phase	Status Report Update	Overall Health	Verified Business Case	Total FY Benefit Estimate	Total INV Benefit Estimate	Status Report	#Prj	SI
					$1.1	$1.2		210	
[redacted]	1 Discovery		◆					3	
[redacted]	1 Discovery							5	
[redacted]	1 Discovery							1	
[redacted]	1 Discovery								
[redacted] 1	1 Discovery								
[redacted]	1 Discovery							1	
[redacted]	1 Discovery								

Hierarchy Dashboard



Last refreshed:
5/20/2024 12:19:37 PM

You are viewing 6,439 investment(s)

WORKSTREAM: All
INITIATIVE: All
STAGE: All

MILESTONE TIMELINES

All | 4/20/2024 | 12/31/2026

Workstre...	Initiative	Key Milestone	Status
	[redacted]	[redacted]	Not Started
	[redacted]	[redacted]	Not Started
	[redacted]	[redacted]	Not Started
	[redacted]	[redacted]	Not Started
	[redacted]	[redacted]	Not Started
	[redacted]	[redacted]	Not Started
	[redacted]	[redacted]	Not Started
	[redacted]	[redacted]	Not Started
	[redacted]	[redacted]	Not Started
	[redacted]	[redacted]	Not Started
Blueprint	[redacted]	[redacted]	Not Started

UPCOMING TPT GATE

Approved

Project	Gate 1	Gate 2	Gate 3	Gate 4	Gate 5
[redacted]					

FINANCIALS - COST & VALUE

1/1/2024 | 11/30/2026

☑ EBIT Productivity
☑ Value from New Revenue
☑ One Time Cost
☑ Total CapEx

EBIT Productivity
$[redacted] M

Value from New Revenue
($[redacted] M)

One Time Cost
$[redacted]M

Total CapEx
$[redacted]M

● EBIT Productivity ● Value from New Revenue ● One Time Cost ● Total CapEx
$0.2bn
$0.1bn
$0.0bn
($0.1bn)
2024
2025
2026
(\$0.0bn)

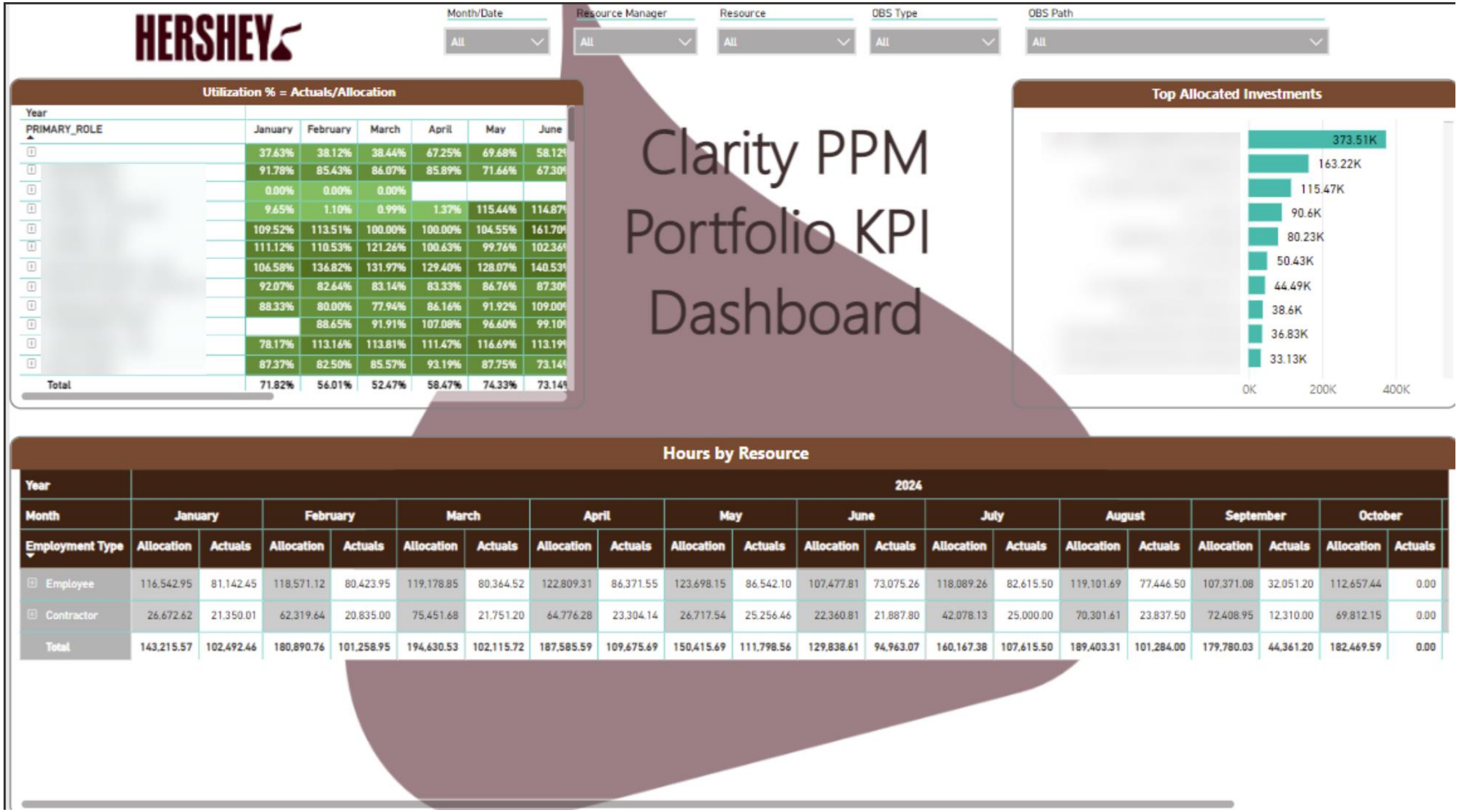
RISKS

TPT Workstream	Risk Description
[redacted]	[redacted]

ISSUES

TPT Workseam	Issue Description
[redacted]	[redacted]

Allocations vs Actuals


HERSHEY
Month/Date
All
Resource Manager
All
Resource
All
OBS Type
All
OBS Path
All
Top Allocated Investments
373.51K
163.22K
115.47K
90.6K
80.23K
50.43K
44.49K
38.6K
36.83K
33.13K
0K
200K
400K

Clarity PPM Portfolio KPI Dashboard

Utilization % = Actuals/Allocation

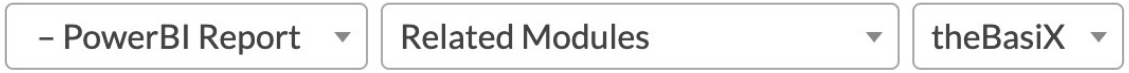
Year PRIMARY_ROLE	January	February	March	April	May	June
⊞	37.63%	38.12%	38.44%	67.25%	69.68%	58.12
⊞ [redacted]	91.78%	85.43%	86.07%	85.89%	71.66%	67.30
⊞ [redacted]	0.00%	0.00%	0.00%			
⊞ [redacted]	9.65%	1.10%	0.99%	1.37%	115.44%	114.87
⊞ [redacted]	109.52%	113.51%	100.00%	100.00%	104.55%	161.70
⊞ [redacted]	111.12%	110.53%	121.26%	100.63%	99.76%	102.36
⊞ [redacted]	106.58%	136.82%	131.97%	129.40%	128.07%	140.53
⊞ [redacted]	92.07%	82.64%	83.14%	83.33%	86.76%	87.30
⊞ [redacted]	88.33%	80.00%	77.94%	86.16%	91.92%	109.00
⊞ [redacted]		88.65%	91.91%	107.08%	96.60%	99.10
⊞ [redacted]	78.17%	113.16%	113.81%	111.47%	116.69%	113.19
⊞ [redacted]	87.37%	82.50%	85.57%	93.19%	87.75%	73.14
Total	71.82%	56.01%	52.47%	58.47%	74.33%	73.14

Hours by Resource

Year	2024																			
Month	January		February		March		April		May		June		July		August		September		October	
Employment Type	Allocation	Actuals	Allocation	Actuals	Allocation	Actuals	Allocation	Actuals	Allocation	Actuals	Allocation	Actuals	Allocation	Actuals	Allocation	Actuals	Allocation	Actuals	Allocation	Actuals
⊞ Employee	116,542.95	81,142.45	118,571.12	80,423.95	119,178.85	80,364.52	122,809.31	86,371.55	123,698.15	86,542.10	107,477.81	73,075.26	118,089.26	82,615.50	119,101.69	77,446.50	107,371.08	32,051.20	112,657.44	0.00
⊞ Contractor	26,672.62	21,350.01	62,319.64	20,835.00	75,451.68	21,751.20	64,776.28	23,304.14	26,717.54	25,256.46	22,360.81	21,887.80	42,078.13	25,000.00	70,301.61	23,837.50	72,408.95	12,310.00	69,812.15	0.00
Total	143,215.57	102,492.46	180,890.76	101,258.95	194,630.53	102,115.72	187,585.59	109,675.69	150,415.69	111,798.56	129,838.61	94,963.07	160,167.38	107,615.50	189,403.31	101,284.00	179,780.03	44,361.20	182,469.59	0.00

Additional Resources

- Rego Webinars:
  - Rego’s Free Clarity Power BI Dashboards: A Deep Dive – Part 1
  - Rego’s Free Clarity Power BI Dashboards: A Deep Dive – Part 2
  - Winning Reporting Strategies
- Rego Free Trainings:
  - PowerBI (repeats monthly)
  - Jaspersoft (repeats monthly)
- RegoXchange
  - PowerBI Reports
    - Filter for:



– PowerBI Report

Related Modules

theBasiX

Questions?

regoUniversity
KANSAS CITY · 2024

Surveys

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

Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

Phone
888.813.0444

Email
info@regoconsulting.com

Website
www.regouniversity.com