



regoUniversity

KANSAS CITY • 2024

Sponsored by

ValueOps
by Broadcom

Clarity
by Broadcom

Rally
by Broadcom

ConnectALL
by Broadcom

Insights
by Broadcom

Rego PowerBI Reporting Suite Overview

Your Guides:
Robert Newell & Lulu Wang

Part I: Introduction



Agenda

- What is the Rego PowerBI Reporting Suite?
- Where to find the Reporting Suite?
- How to implement and Setup?
- Who owns the reports and Maintenance?
- Do You Need Rego's PowerBI SaaS Service?
- Customization and Flexibility

What is the Rego PowerBI Reporting Suite?

Nearly 100 Free Reports

The Rego PowerBI Reporting Suite features close to 100 free PowerBI reports, designed to enhance project management and reporting capabilities.

Direct Connection to Clarity Environment

These reports can seamlessly connect to a client's Clarity environment, allowing for in time data visualization and insights.

Comprehensive Overview and Examples

The suite provides a comprehensive overview of available reports and practical examples, showcasing the potential of PowerBI in project management.

Where To Find the Reporting Suite?

1

The Rego PowerBI Reporting Suite is accessible on Rego Exchange under a no-cost option, providing easy access to users.

2

Users can utilize drill down, drill through, and drill back capabilities to analyze their data effectively.

3

Access to content within Clarity is streamlined via Pages in MUX or directly from Power BI dashboards.

4

Row-level security is possible to ensure that users only see the data they are authorized to view.

Implementation and Setup

Implementation Effort

The implementation of the Rego PowerBI Reporting Suite requires a low-level effort, primarily focused on data integration and report customization.

Environment Customization

Users can tailor the reporting environment to their specific needs by modifying settings and configurations to align with their organizational requirements.

Rego Support Services

Rego offers installation and configuration services to assist clients in setting up the reports efficiently, ensuring a smooth transition to using the PowerBI suite.

Ownership and Maintenance



Clients typically own the PowerBI reports after implementation, ensuring they have full control over their data and insights.



Clients are responsible for maintaining the reports, including updates, data management, and ensuring data accuracy.



Rego offers ongoing support options, including maintenance services and consultation to assist clients with any issues or enhancements needed.

Do You Need Rego's PowerBI SaaS Service?

Service Overview

Rego's PowerBI SaaS service installs, setups, and maintains PowerBI reports for you. It also includes PowerBI Licenses so you don't have to deal with licensing with Microsoft.

Data Management

The service includes automated data refresh capabilities, ensuring that reports reflect the most current data without manual intervention.

Support and Maintenance

Clients receive ongoing support for troubleshooting and maintenance, reducing the burden on internal IT teams.

Customization and Flexibility

1

Reports can be tailored to specific project requirements, ensuring relevance and usability for the client.

2

The integration with Clarity DWH/Live Database allows for dynamic data retrieval through Broadcom or Rego OData connectors, enhancing report functionality.

3

Clients have the flexibility to modify existing reports or create new ones, adapting to changing project demands and objectives.

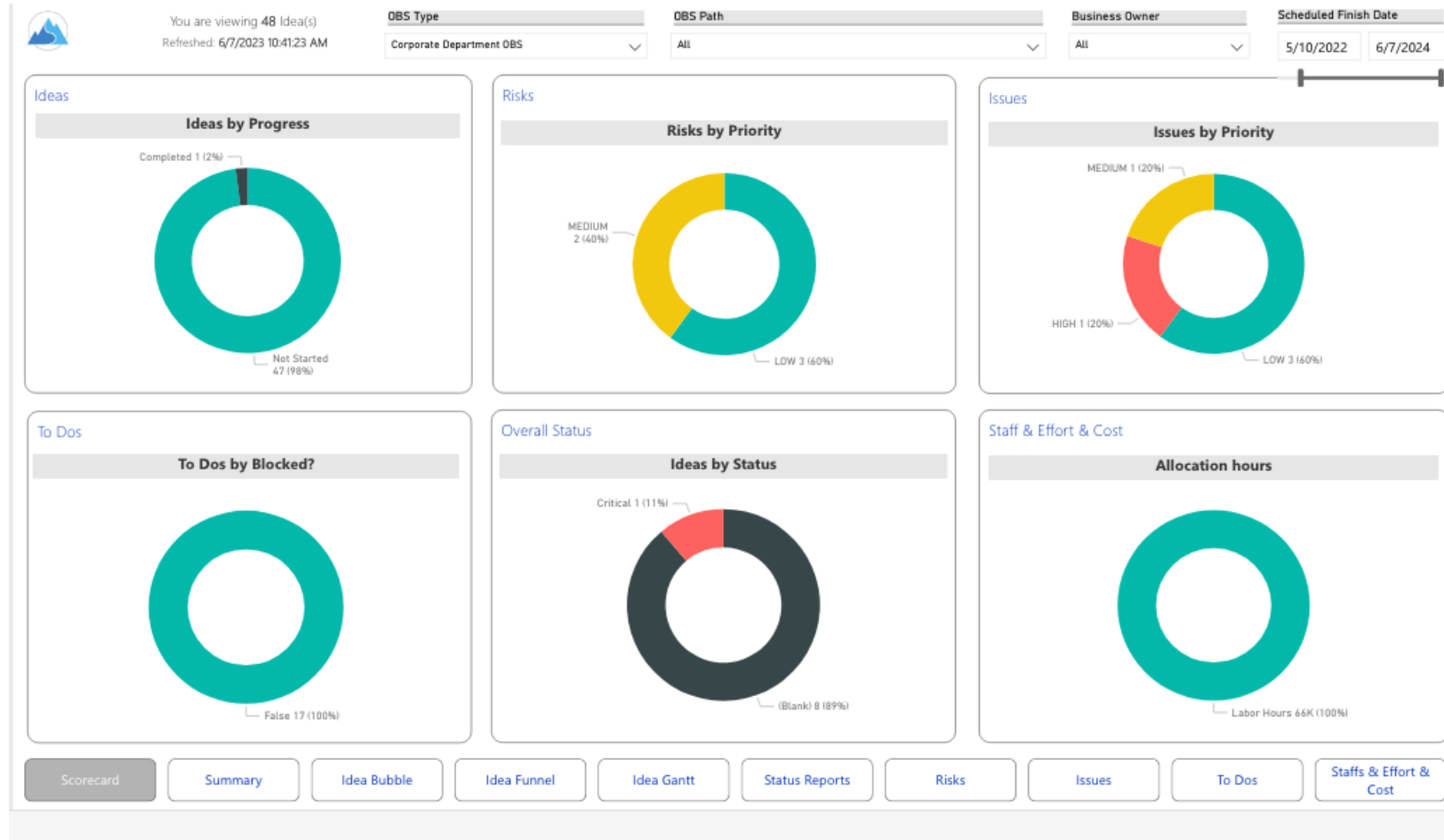
Ideas



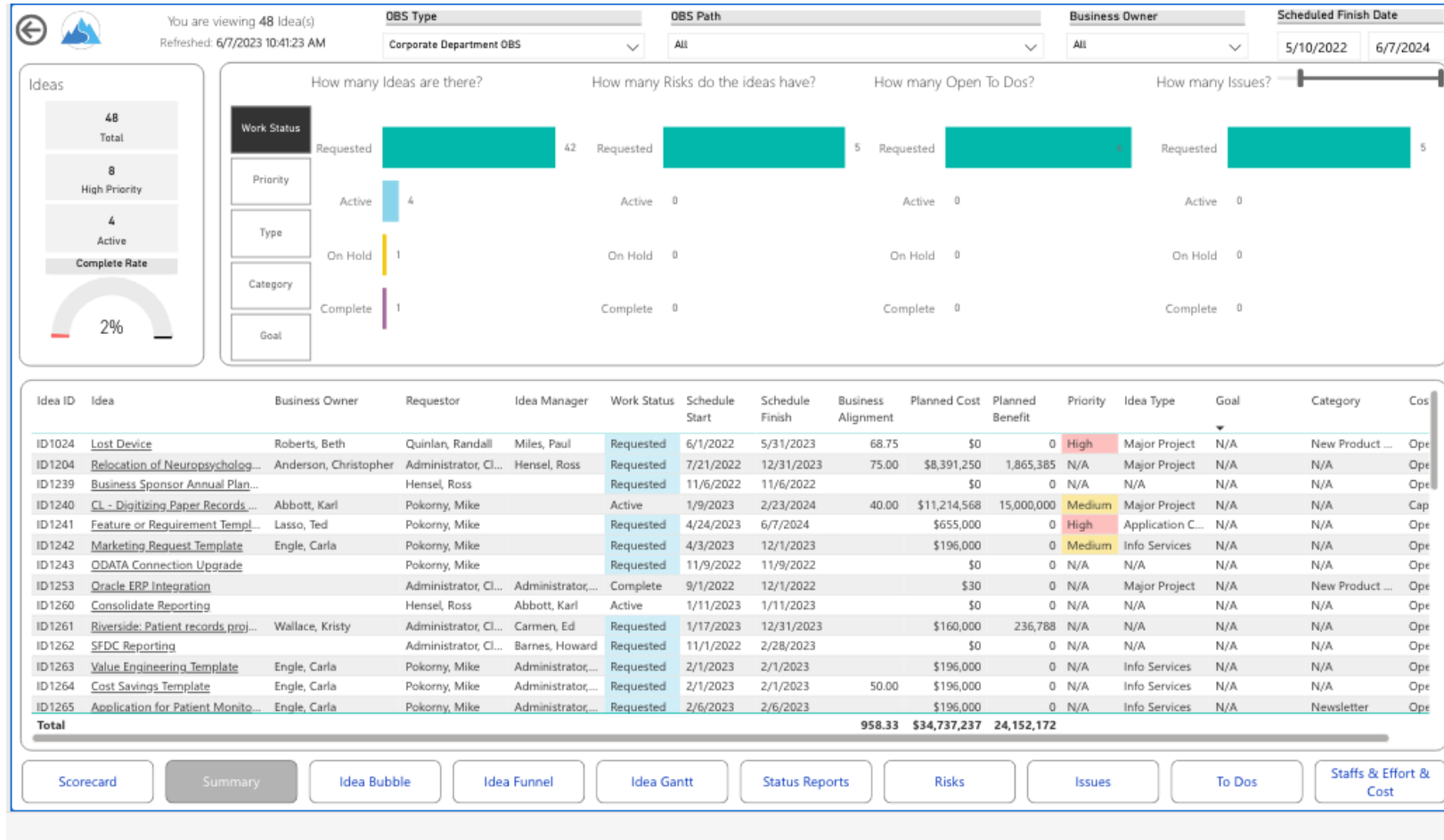
regoUniversity

KANSAS CITY • 2024

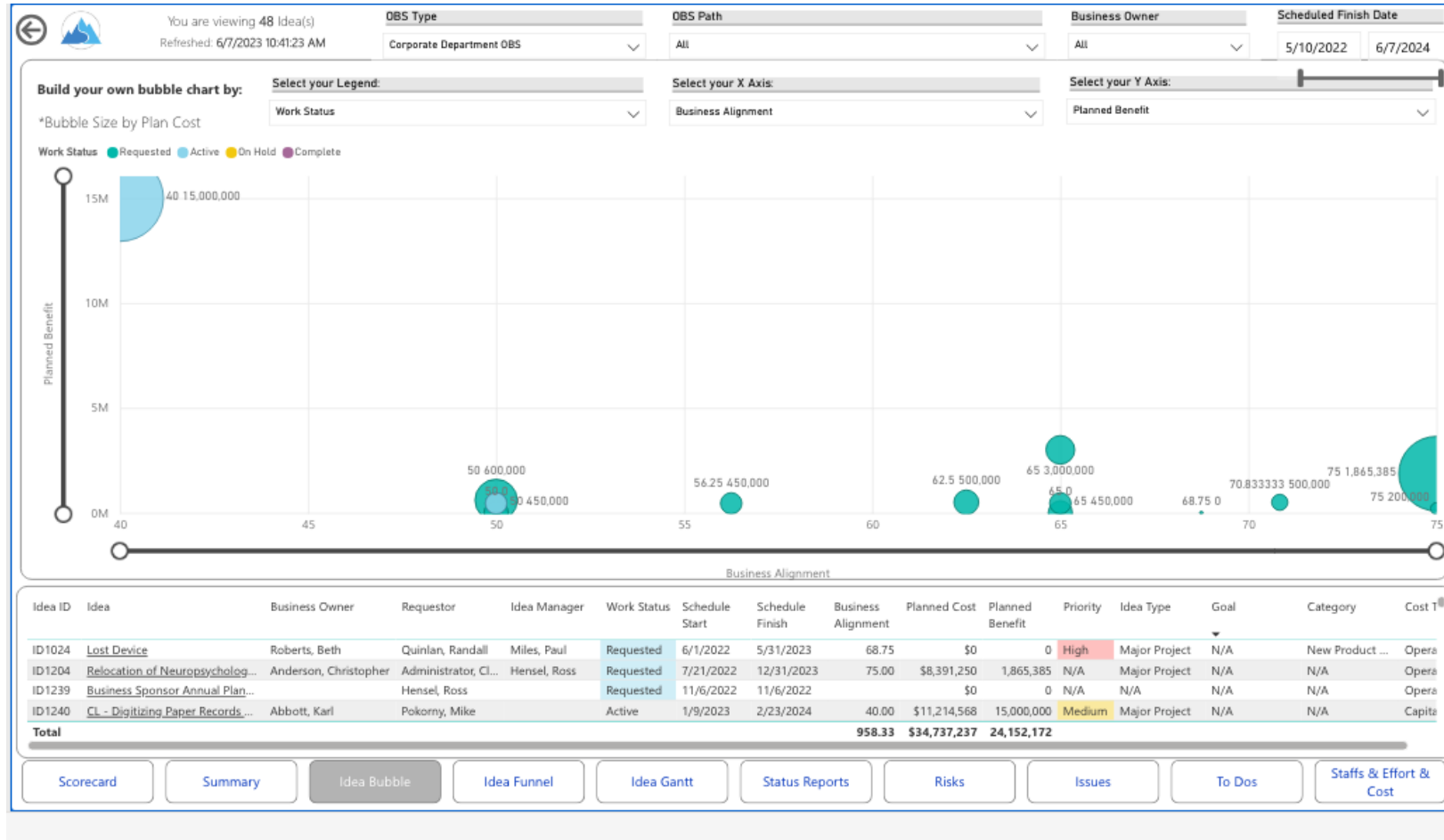
Idea Overview



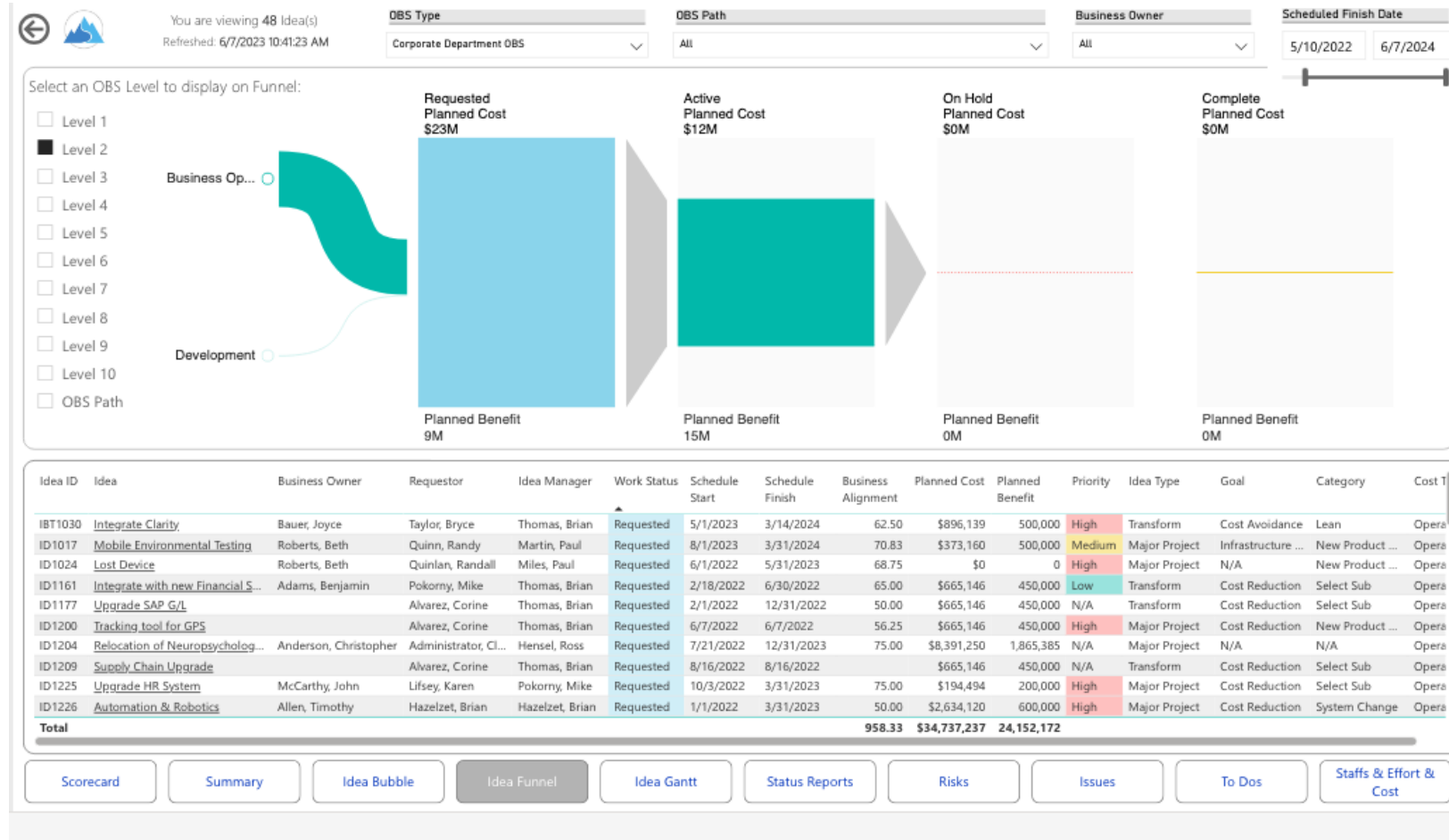
Idea Details



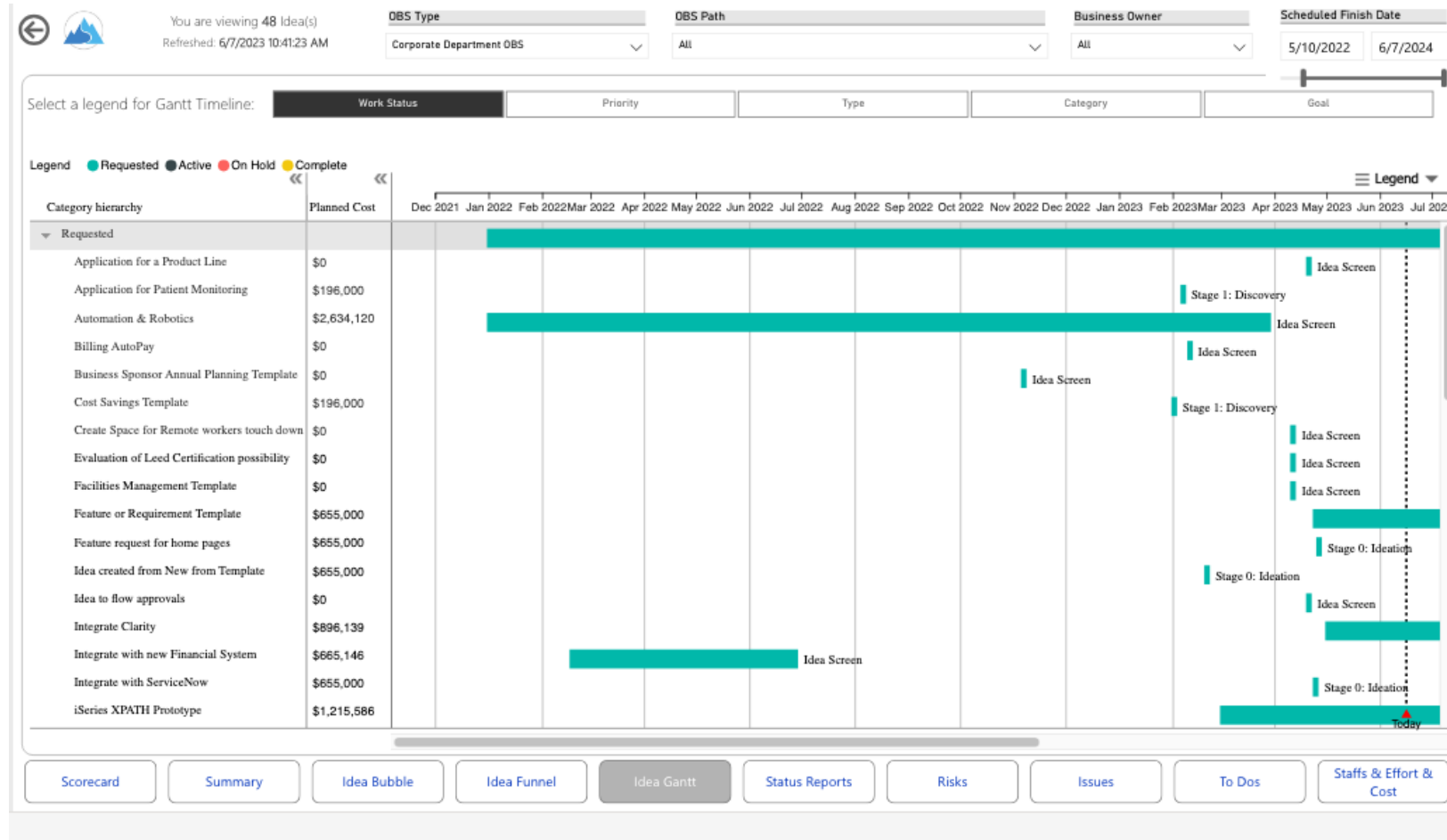
Idea Bubble



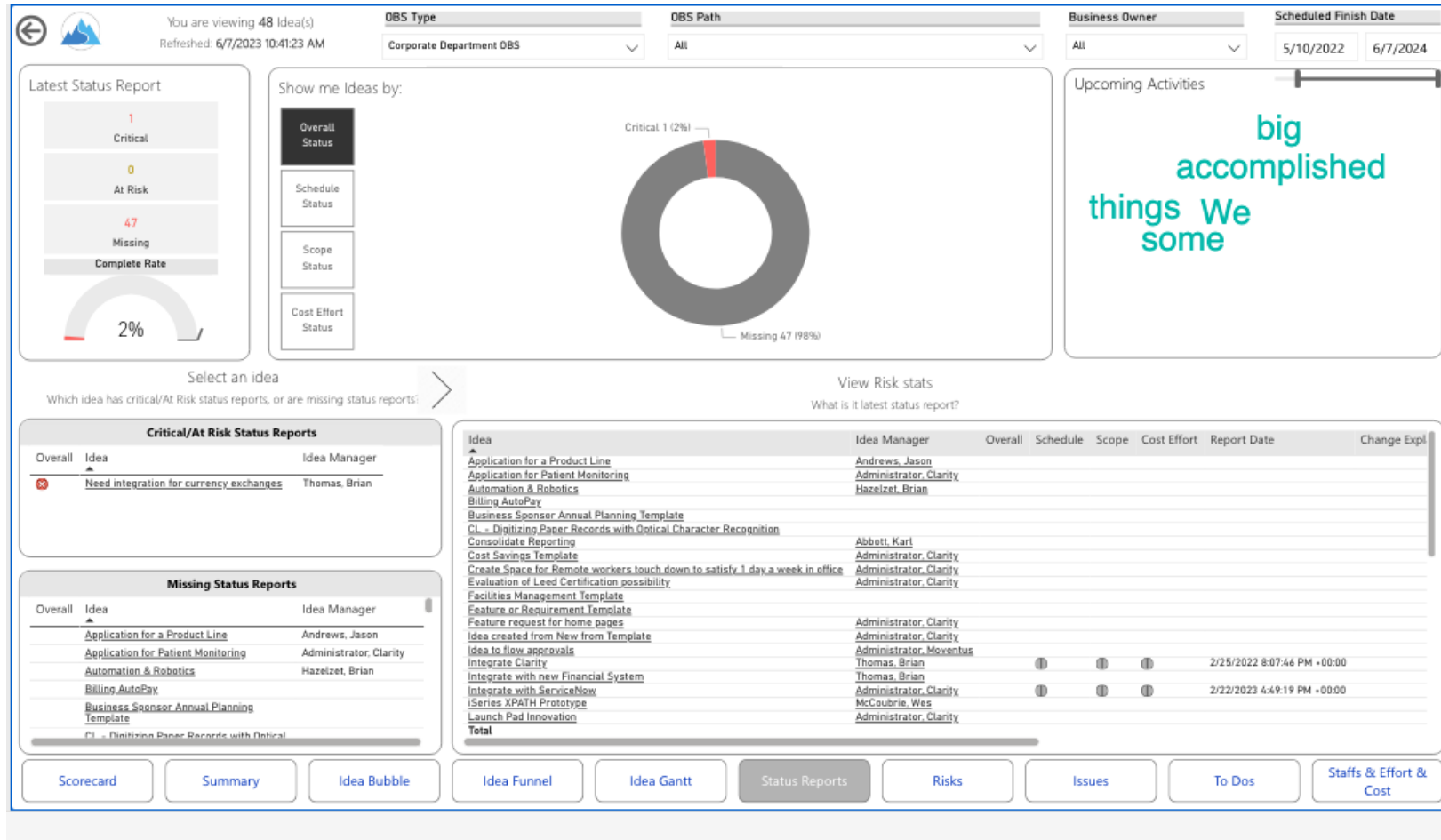
Idea Funnel



Idea Gant



Idea Status



Idea To Do's

You are viewing 48 Idea(s)
Refreshed: 6/7/2023 10:41:23 AM

OBS Type: Corporate Department 0...
 OBS Path: All
 Business Owner: All
 Schedule Finish: 5/10/2022, 6/7/2024
 Blocked?: All

To Do Summary

17 To Dos

(Blank) Open Blocked Rate

(Blank) Blocked Open

4 Open

76% Completion Rate

Upcoming To Dos in: 60 Days

(Blank) Blocked Open To Dos

4 Open To Dos

Idea	To Do	Status	Blocked?	Due Date
CL - Digitizing Paper Records with ...	Meet with Jacob	Completed	False	11/11/2022
CL - Digitizing Paper Records with ...	Work with Finance on funding	Completed	False	11/25/2022
Patient Record Reporting	Get app view done by james	Open	False	
Patient Record Reporting	Get Sign off from Mary	Completed	False	3/2/2023
Relocation of Neuropsychology Pro...	Enterprise Architecture Approval	Completed	False	11/18/2022
Relocation of Neuropsychology Pro...	Finalize estimates	Completed	False	10/24/2022
Relocation of Neuropsychology Pro...	Finance Approval	Completed	False	11/8/2022

Upcoming Open To Dos

Blocked? False

(Blank)

Select an idea
Which idea has the most to dos?

Overall	Idea	To Dos	Blocked	Open	Completed
1	CL - Digitizing Paper Records with Optical Charac...	2			2
1	Patient Record Reporting	2		1	1
1	Relocation of Neuropsychology Program	7			7
1	Riverside: Patient records project	6		3	3
Total		17		4	13

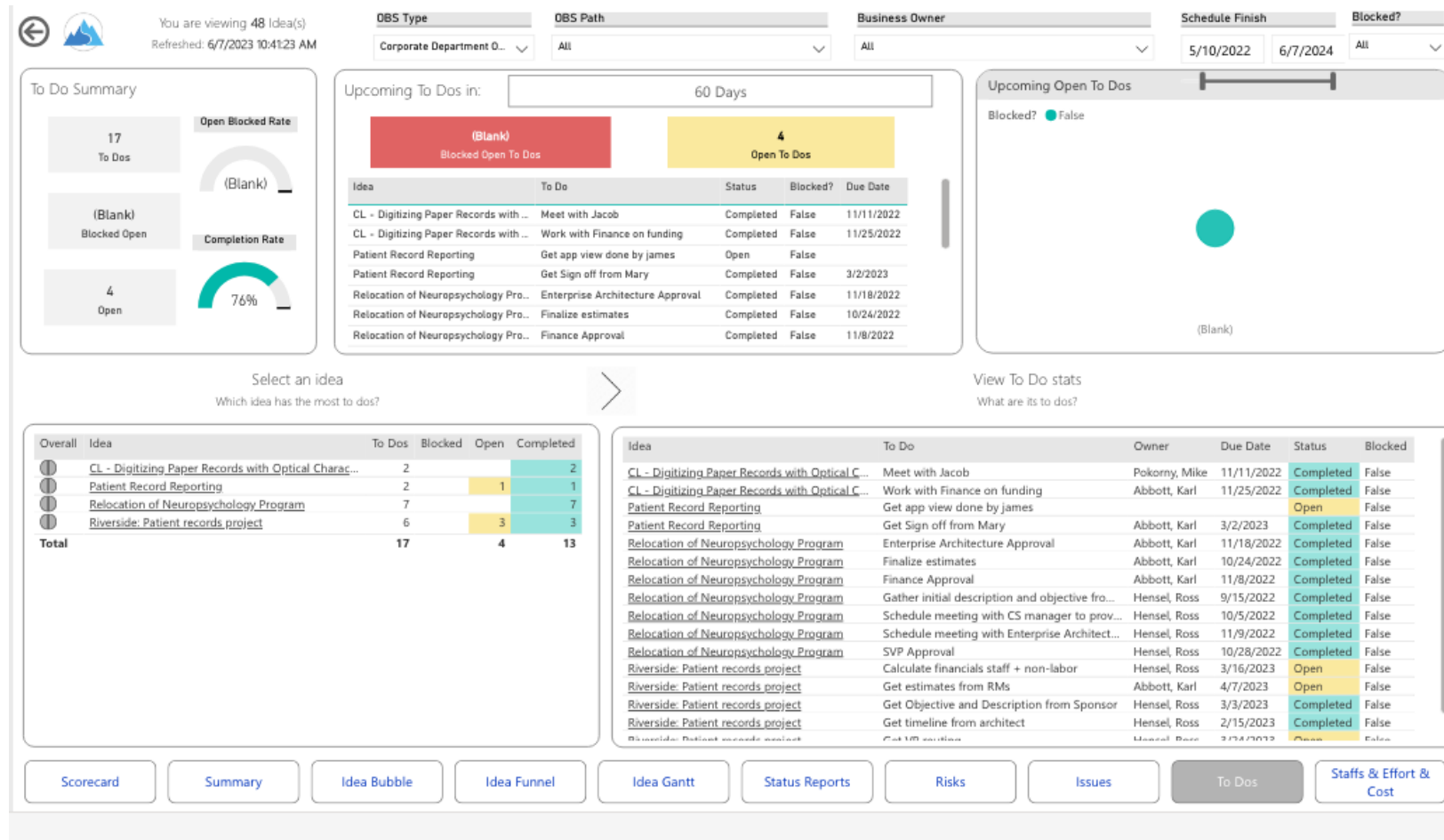
View To Do stats

What are its to dos?

Idea	To Do	Owner	Due Date	Status	Blocked
CL - Digitizing Paper Records with Optical C...	Meet with Jacob	Pokorny, Mike	11/11/2022	Completed	False
CL - Digitizing Paper Records with Optical C...	Work with Finance on funding	Abbott, Karl	11/25/2022	Completed	False
Patient Record Reporting	Get app view done by james			Open	False
Patient Record Reporting	Get Sign off from Mary	Abbott, Karl	3/2/2023	Completed	False
Relocation of Neuropsychology Program	Enterprise Architecture Approval	Abbott, Karl	11/18/2022	Completed	False
Relocation of Neuropsychology Program	Finalize estimates	Abbott, Karl	10/24/2022	Completed	False
Relocation of Neuropsychology Program	Finance Approval	Abbott, Karl	11/8/2022	Completed	False
Relocation of Neuropsychology Program	Gather initial description and objective fro...	Hensel, Ross	9/15/2022	Completed	False
Relocation of Neuropsychology Program	Schedule meeting with CS manager to prov...	Hensel, Ross	10/5/2022	Completed	False
Relocation of Neuropsychology Program	Schedule meeting with Enterprise Architect...	Hensel, Ross	11/9/2022	Completed	False
Relocation of Neuropsychology Program	SVP Approval	Hensel, Ross	10/28/2022	Completed	False
Riverside: Patient records project	Calculate financials staff + non-labor	Hensel, Ross	3/16/2023	Open	False
Riverside: Patient records project	Get estimates from RMs	Abbott, Karl	4/7/2023	Open	False
Riverside: Patient records project	Get Objective and Description from Sponsor	Hensel, Ross	3/3/2023	Completed	False
Riverside: Patient records project	Get timeline from architect	Hensel, Ross	2/15/2023	Completed	False

Scorecard
Summary
Idea Bubble
Idea Funnel
Idea Gantt
Status Reports
Risks
Issues
To Dos
Staffs & Effort & Cost

Idea Staff & Effort



RoadMap

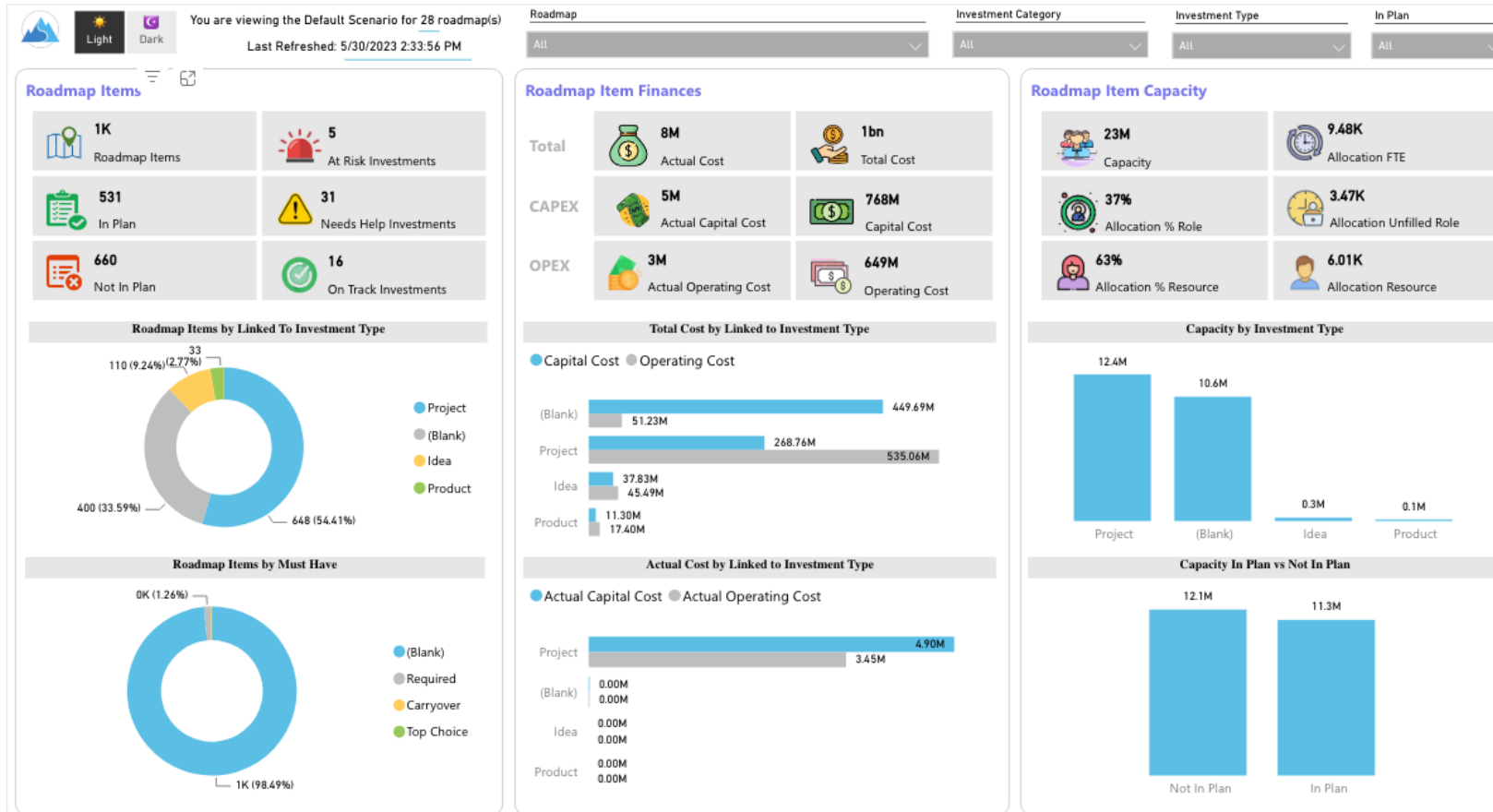


regoUniversity

KANSAS CITY • 2024

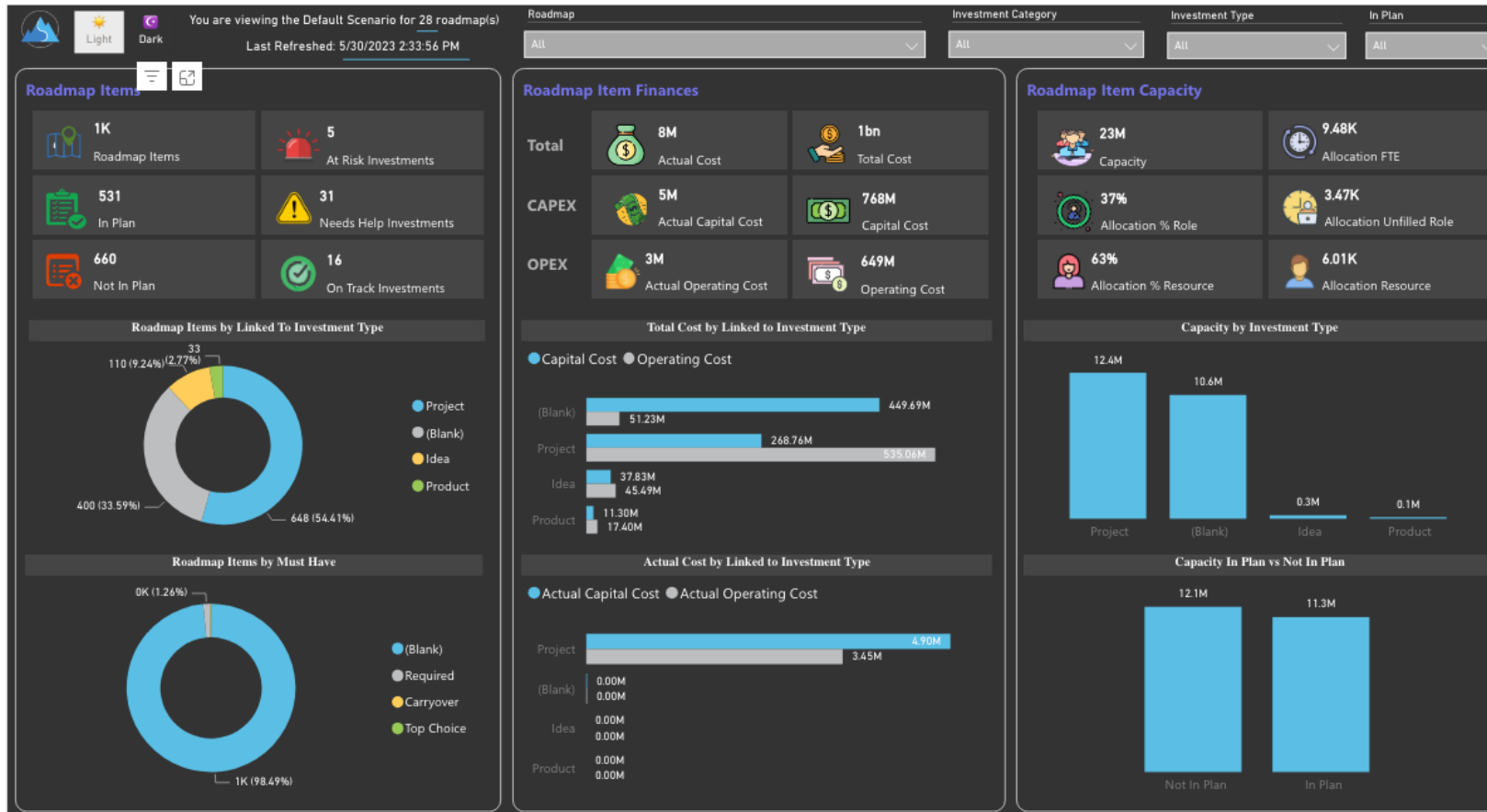
Roadmap Overview

Default Scenarios



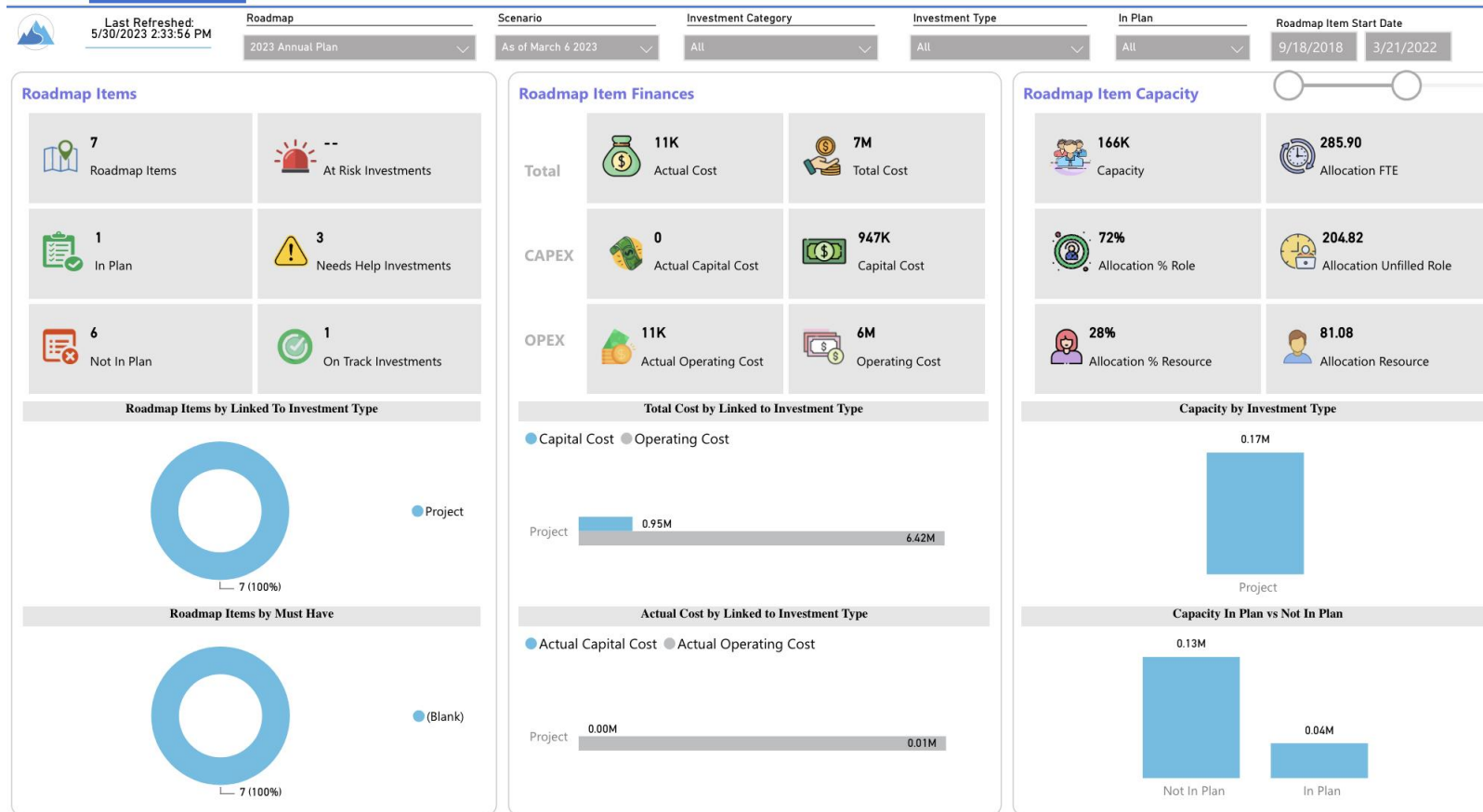
Roadmap Overview

Dark Mode

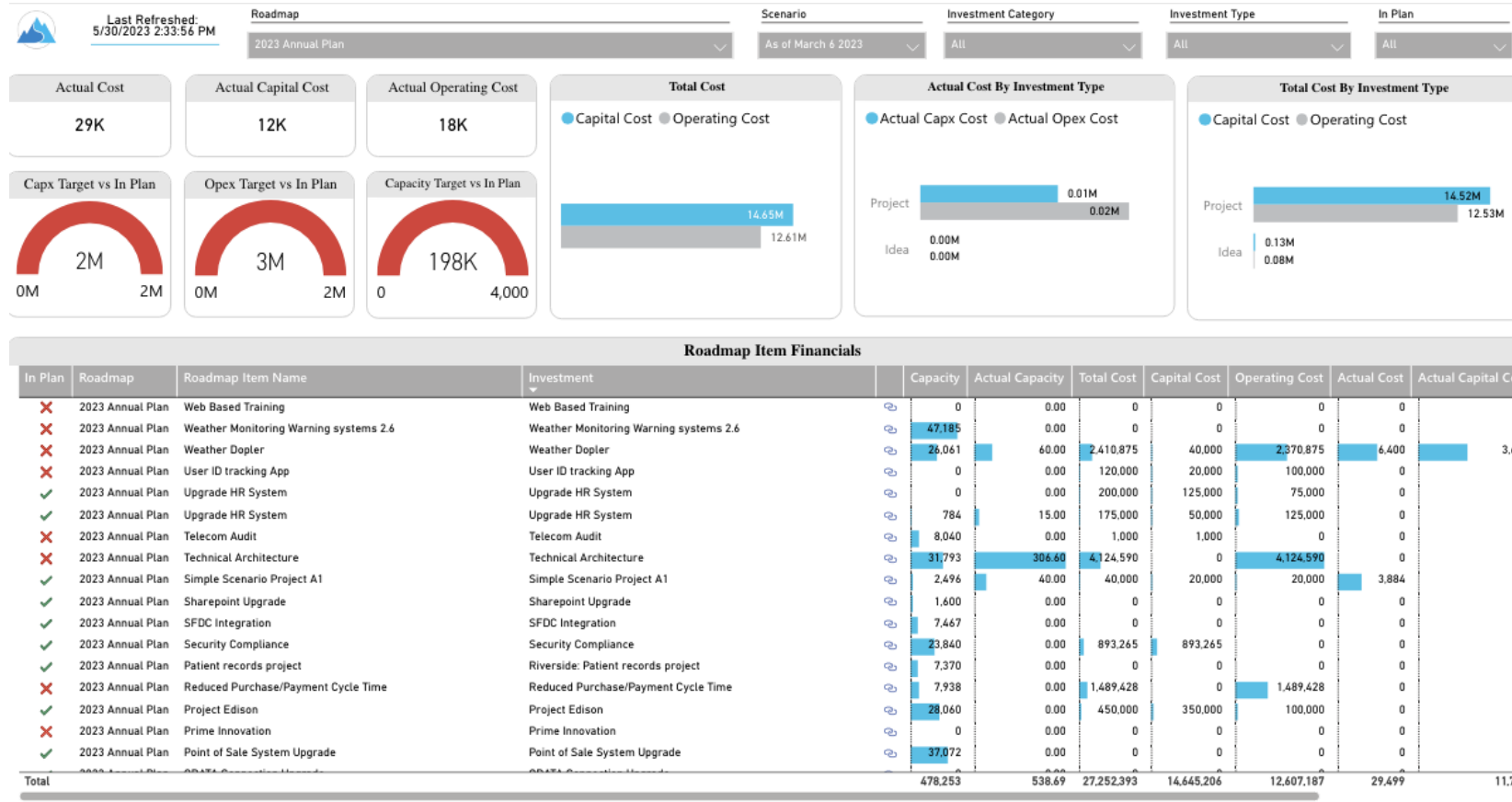


Roadmap Overview

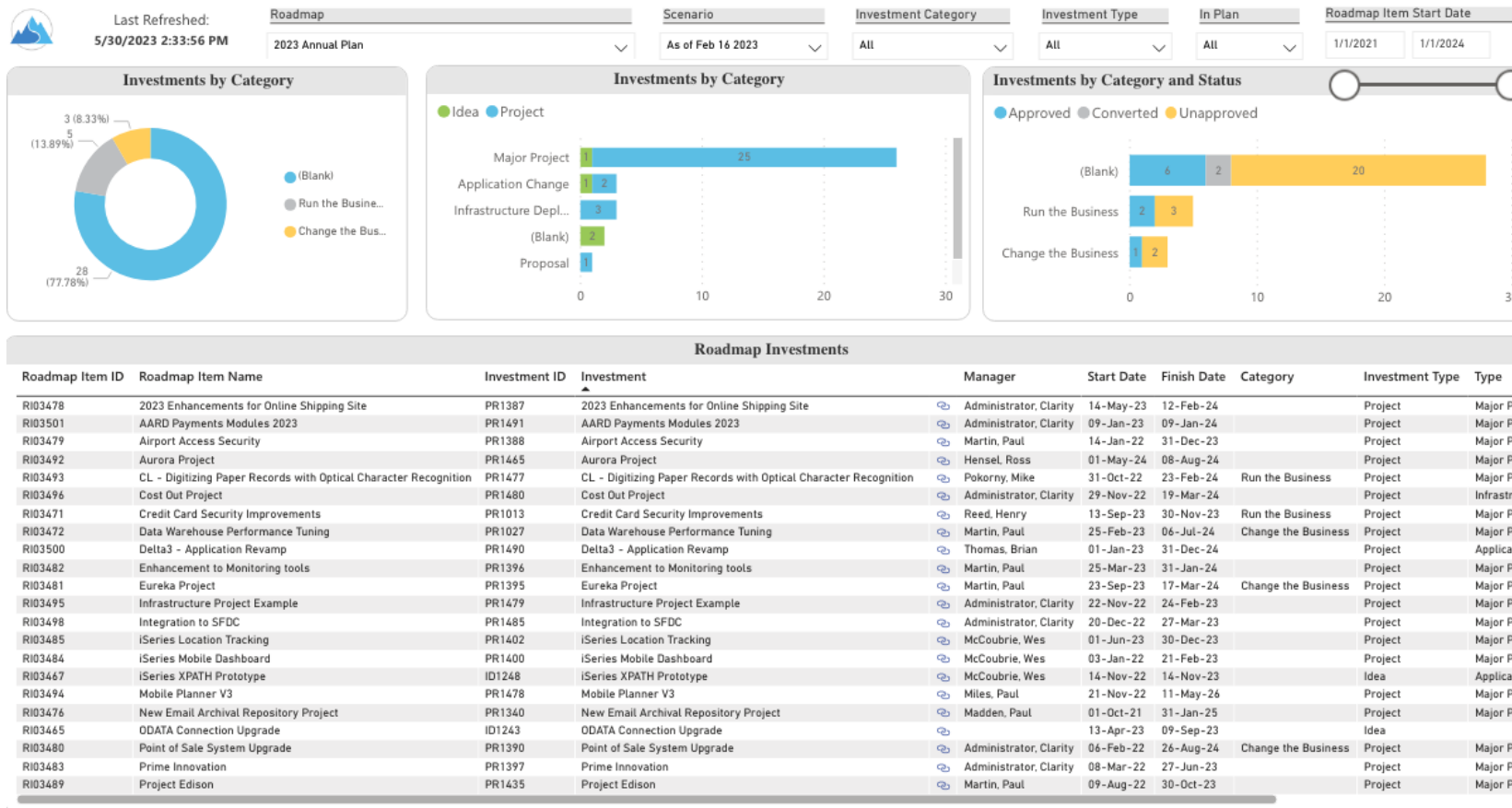
Single Roadmap Selection



Roadmap Financials



Investment Details



Scenario Comparison

Last Refreshed:
5/30/2023 2:33:56 PM

Roadmap Name

2023 Annual Plan

Scenario (Select 2)

Multiple selections

Roadmap Item

All

Roadmap Status

Draft

Roadmap Description

Our 2023 annual operating plan is a strategic blueprint that outlines the objectives, goals, and strategies we intend to implement in the upcoming year. This provides a clear and comprehensive roadmap for our organization, identifying key initiatives, projects, and targets, and laying out the necessary resources and actions required to achieve them. The annual operating plan typically includes financial projections, key performance indicators (KPIs), and operational metrics to track progress and measure success. It also outlines the organizational structure, roles, and responsibilities of each department or team, ensuring that everyone is aligned and worki...

Capital Cost

	As of March 6 2023	POR - Default Scenario
Target	2,000,000	80,000
In Plan	2,325,632	2,071,556
Variance	-325,632	-1,991,556

Operating Cost

	As of March 6 2023	POR - Default Scenario
Target	1,999,999	1,999,999
In Plan	2671178	19638831
Variance	-671,179	-17,638,832

Capacity

	As of March 6 2023	POR - Default Scenario
Target	4,000	4,000
In Plan	197,894	355,779
Variance	-193,894	-351,779

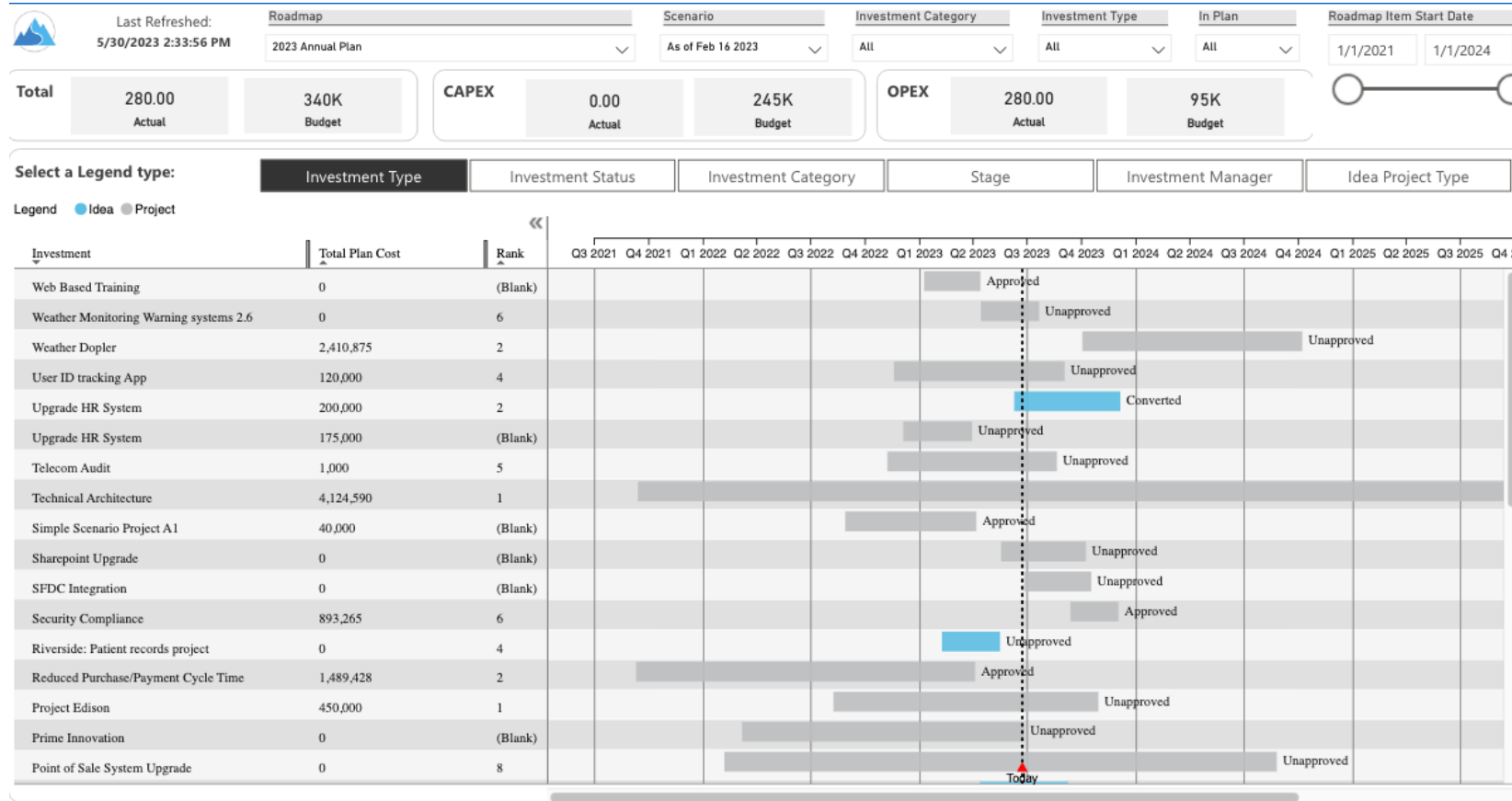
Select to view only roadmap items with delta:

	Capacity	Capital Cost	Operating Cost
Roadmap Item Name	Capacity		
AARD Payments Modules 2023	13,145.70		
Airport Access Security	-6,299.80		
CL - Digitizing Paper Records with Optical Character Recognition	-33,652.00		
Data Warehouse Performance Tuning	-504.00		
Eureka Project	-1,256.00		
iSeries Location Tracking	-1,461.39		
Patient records project	7,370.40		
Riverside: Patient records project	-7,370.40		
Weather Monitoring Warning systems 2.6	298.55		
Total Delta	-29,728.94		

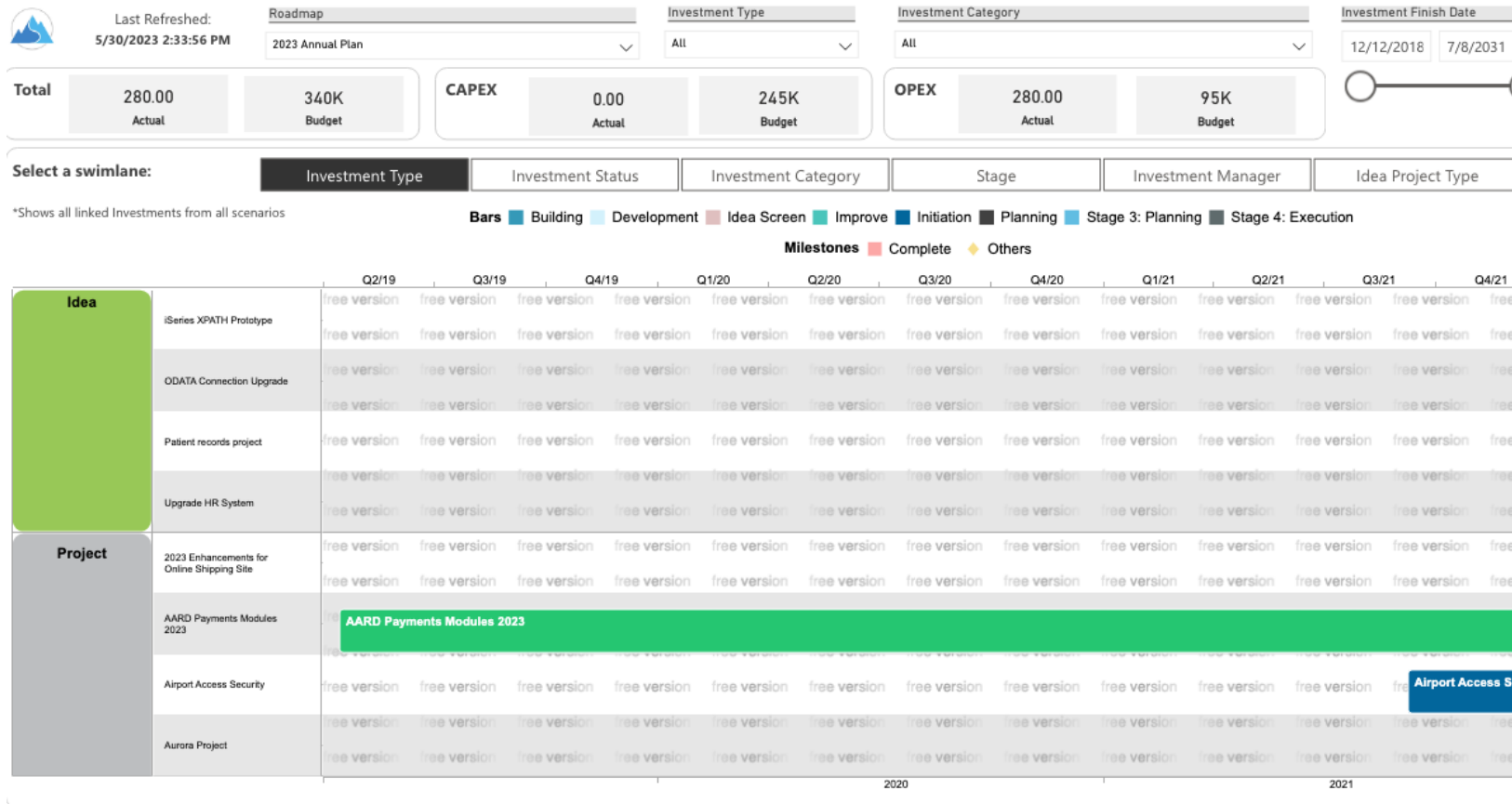
Select to view scenario comparison details:

Roadmap Item Name	As of March 6 2023	POR - Default Scenario	Delta
Web Based Training			
Roadmap Item Start Date	6/2/2023	1/9/2023	-144.00
Roadmap Item Finish Date	9/5/2023	4/14/2023	-144.00
CLARITY_UPDATED_DATE	3/5/2023 9:16:08 PM +00:00	1/18/2023 8:29:50 PM +00:00	
Weather Monitoring Warning systems 2.6			
Roadmap Item Start Date	3/7/2023	1/7/2023	-59.00
Roadmap Item Finish Date	6/13/2023	4/28/2023	-46.00
Remaining Capacity	47184.55171	46877	307.55
RANK	6		6
In Plan	Not In Plan	In Plan	
CLARITY_UPDATED_DATE	3/5/2023 9:16:08 PM +00:00	1/18/2023 8:29:50 PM +00:00	
Capacity	47184.55171	46886	298.55
Actual Capacity	0	9	-9.00
Weather Dopler			
Roadmap Item Start Date	10/3/2023	1/1/2022	-640.00
Roadmap Item Finish Date	10/8/2024	1/7/2023	-640.00
RANK	2		2
In Plan	Not In Plan	In Plan	
CLARITY_UPDATED_DATE	3/5/2023 9:16:08 PM +00:00	1/18/2023 8:29:50 PM +00:00	
User ID tracking App			
Total Cost	120000	0	120,000.00
Roadmap Item Start Date	11/19/2022	11/19/2021	-365.00
Roadmap Item Finish Date	9/3/2023	12/5/2022	-272.00
Remaining Total Cost	120000	0	120,000.00
Remaining Operating Cost	100000	0	100,000.00
Remaining Capital Cost	20000	0	20,000.00
RANK	4		4
Operating Cost	100000	0	100,000.00

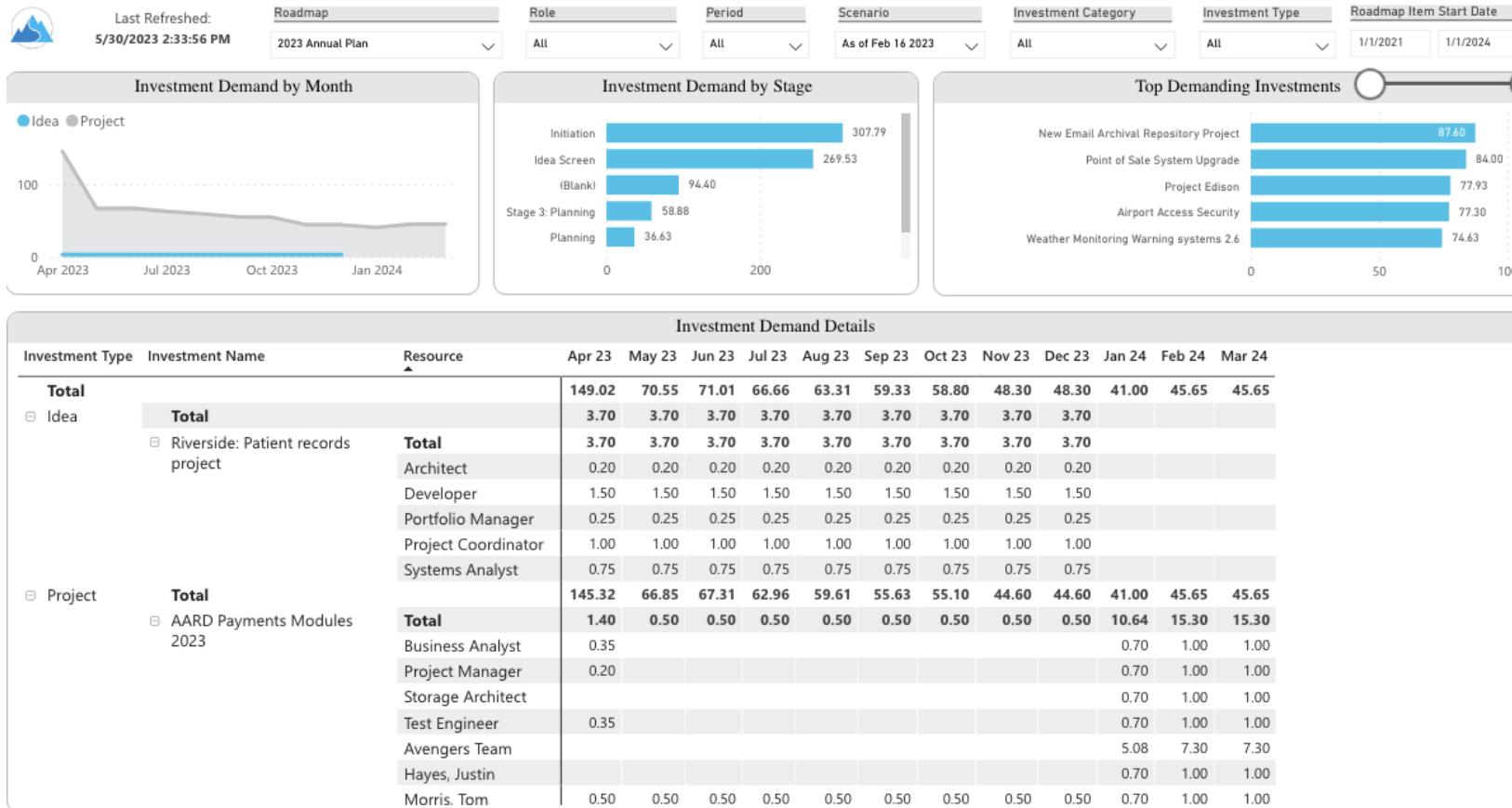
Roadmap Item Gantt




Roadmap Investment Gantt



Resource Investment Demand



Scenario Comparison



Last Refreshed: 5/4/2023
4:40:38 PM

Roadmap Name

2023 Annual Plan

Scenario (Select 2)

Multiple selections

Roadmap Item

All

Roadmap Status

(Blank)

Roadmap Description

Our 2023 annual operating plan is a strategic blueprint that outlines the objectives, goals, and strategies we intend to implement in the upcoming year. This provides a clear and comprehensive roadmap for our organization, identifying key initiatives, projects, and targets, and laying out the necessary resources and actions required to achieve them. The annual operating plan typically includes financial projections, key performance indicators (KPIs), and operational metrics to track progress and measur...

Capital Cost

	As of March 6 2023	Default Scenario
Target	2,000,000	80,000
In Plan	345,457	108,739
Variance	1,654,543	-28,739

Operating Cost

	As of March 6 2023	Default Scenario
Target	1,999,999	1,999,999
In Plan	3,717,164.51	4,453,386.77
Variance	-1,717,166	-2,453,388

Capacity

	As of March 6 2023	Default Scenario
Target	4,000	4,000
In Plan	197,894	322,107
Variance	-193,894	-318,107

Select to view only roadmap items with delta:

	Capacity	Capital Cost	Operating Cost
Roadmap Item Name	Capacity		
SFDC Integration	2,986.67		
Security Compliance	11,040.00		
Reduced Purchase/Payment Cycle Time	3,240.00		
Patient records project	7,370.40		
iSeries Location Tracking	3,226.61		
Eureka Project	1,548.00		
Cost Out Project	-1,469.79		
CL - Digitizing Paper Records with Optical Character Recognition	2,660.00		
AARD Payments Modules 2023	14,560.00		
Total Delta	45,161.88		

Select to view scenario comparison details:

Roadmap Item Name	As of March 6 2023	Default Scenario	Delta
Web Based Training			
Roadmap Item Start Date	6/2/2023	1/9/2023	-144.00
Roadmap Item Finish Date	9/5/2023	4/14/2023	-144.00
Weather Monitoring Warning systems 2.6			
Roadmap Item Start Date	3/7/2023	6/25/2023	110.00
Roadmap Item Finish Date	6/13/2023	10/15/2023	124.00
In Plan	Not In Plan	In Plan	
Weather Dopler			
Roadmap Item Start Date	10/3/2023	10/29/2022	-339.00
Roadmap Item Finish Date	10/8/2024	11/4/2023	-339.00
In Plan	Not In Plan	In Plan	
User ID tracking App			
Total Cost	120000	0	120,000.00
Roadmap Item Finish Date	9/3/2023	12/5/2023	93.00
Remaining Total Cost	120000	0	120,000.00
Remaining Operating Cost	100000	0	100,000.00
Remaining Capital Cost	20000	0	20,000.00
Operating Cost	100000	0	100,000.00
In Plan	Not In Plan	In Plan	
Capital Cost	20000	0	20,000.00
Benefit	500000	0	500,000.00
Upgrade HR System			
Roadmap Item Start Date	1/6/2024	12/5/2022	-397.00
Telecom Audit			
In Plan	Not In Plan	In Plan	
Technical Architecture			
In Plan	Not In Plan	In Plan	
Sharepoint Upgrade			
Roadmap Item Start Date	7/1/2023	7/17/2023	16.00
Roadmap Item Finish Date	11/21/2023	12/7/2023	16.00

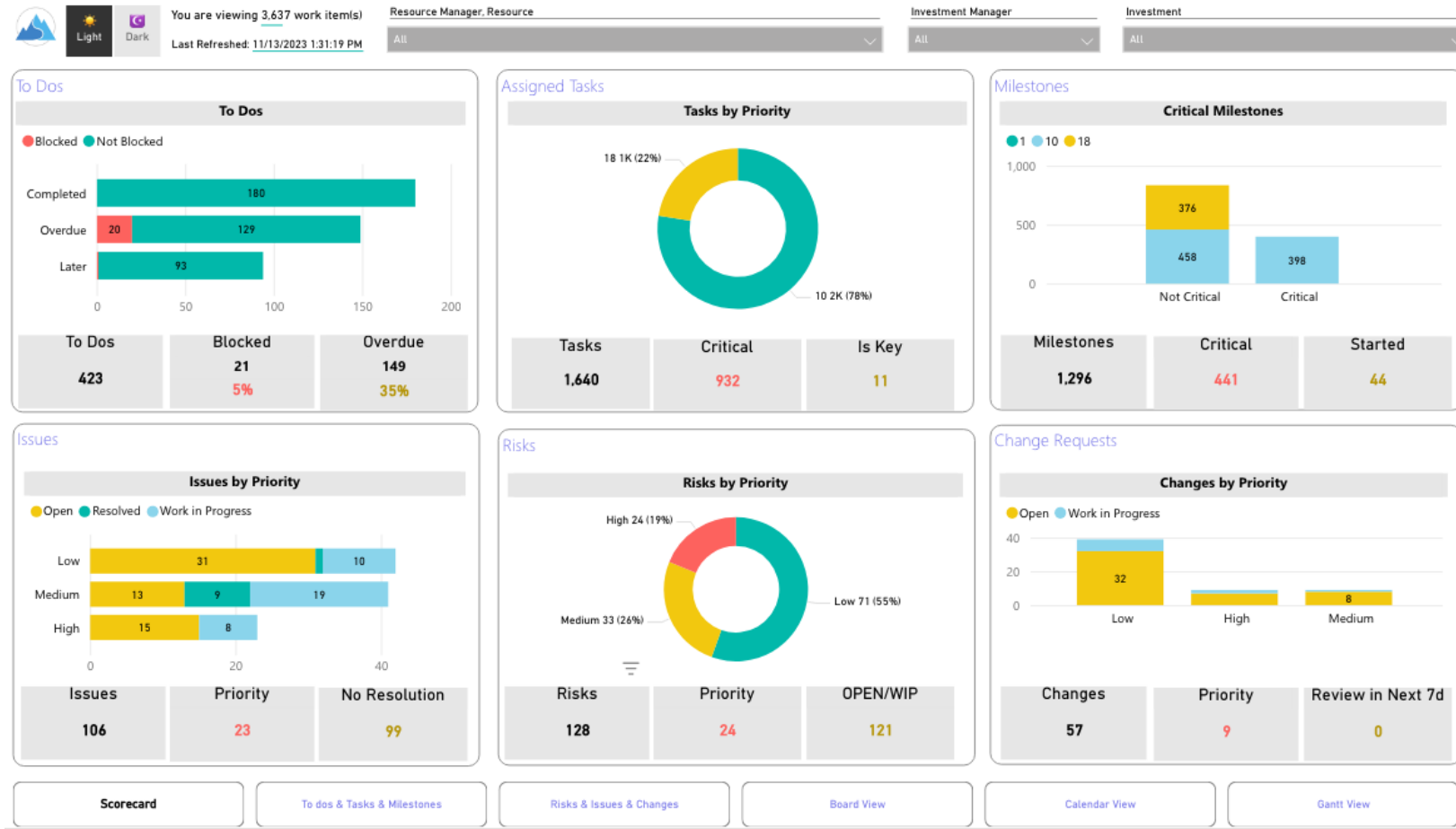
Work Management



regoUniversity

KANSAS CITY • 2024

Scorecard



To dos & Tasks & Milestones

You are viewing 3,637 work item(s)
 Last Refreshed: 11/13/2023 1:31:19 PM

Resource Manager, Resource: All | Investment Manager: All | Investment: All

Select all | Overdue | Next 7 Days | Later | Completed

To Dos

To Dos: 423 | Blocked: 21 | Overdue: 149

Blocked %: 0% | 5% | 100% | Overdue %: 0% | 35% | 100% | Completed %: 0% | 43% | 100%

To Do	Investment	Owner	Blocked	Completed	Due Date	Associate
1		Lasso, Ted			10/7/2022	checklists
1234	Business process re-e...	Adams, Ben...		✓	9/13/2023	risks
1234	Implementation Re Eng...	Adams, Ben...			11/22/2023	risks
2		Lasso, Ted			10/14/2022	checklists
3		Lasso, Ted			11/25/2022	checklists
AARD needs to do this f...	AARD Payments Modu...	Abbott, Karl			7/8/2023	changes
All Documents Submite...						checklists
All Documents Submite...	Clarity PPM Enhancem...	Avengers T...				checklists
Allocations Review	Billing Self Service Re...					checklists
Allocations Review	Billing Self Service Sig...					checklists
Allocations Review	Financial Plans - Traini...					checklists
Answer Josh Question		Lasso, Ted	▼		9/25/2022	checklists
Appoint a project manag...	Radiation Oncology Vari...	Hensel, Ross		✓	4/13/2023	checklists
Archive all project docu...	Radiation Oncology Vari...	Abbott, Karl			4/14/2023	checklists
Arrange for advertising ...	Work Management Che...			✓	7/31/2023	checklists
asdasdasdas	Financial Budgeting	Chio, Mike		✓		checklists
Attend Booking Call	Airport Access Security					tasks
Book a meeting	AARD Payments Modu...	Abbott, Karl				tasks
Book flight		Administrat...		✓	6/5/2022	checklists
Book flight	Airport Access Security	Administrat...			6/5/2022	checklists
book hotel		Administrat...		✓	6/9/2022	checklists
book hotel	Airport Access Security	Administrat...		✓	6/9/2022	checklists
Book kickoff	CRM Enhancements	Abbott, Karl		✓	2/24/2022	tasks
Book Meeting	AARP Integration					tasks
Book Meeting	Copy AARP Integration					tasks
Book meeting with scie...	MIT AARD Payments M...	Adams, Ben...		✓	4/9/2021	tasks
Book planning meeting	Airport Access Security					tasks
Book Review meeting	Airport Access Security	Abbott, Karl		✓	12/23/2022	tasks
book test room	CRM Enhancements			✓		tasks

Assigned Tasks

Tasks: 1,640 | Critical: 932 | Is Key: 11

Task	Investment	Assignees	Critical	Finish
Complete Project Plan	Application Manage...	Architect:Business Analyst:Project Ma...	!	1/26/2024
Database Development	Application Manage...	Developer	!	2/23/2024
Define Resource Plan	Application Manage...	Project Manager	!	1/19/2024
Define Scope Change and Contro...	Application Manage...	Project Manager	!	1/5/2024
Functional and System Testing	Application Manage...	Test Engineer:Network Engineer	!	3/29/2024
Functional and Technical Design	Application Manage...	Storage Architect:Developer	!	2/16/2024
Identify Infrastructure Requirem...	Application Manage...	Storage Architect:Network Engineer	!	1/26/2024
Lessons Learned	Application Manage...	Business Analyst:Project Manager	!	4/19/2024
Requirements Definition	Application Manage...	Storage Architect:Architect:Network E...	!	2/2/2024
Risk Response and Mitigation Pl...	Application Manage...	Architect:Business Analyst	!	1/19/2024
Unit and Performance Testing	Application Manage...	Test Engineer:Developer:Network Eng...	!	3/22/2024

Milestones

Milestones: 1,296 | Critical: 441 | Started: 44

Milestone	Investment	Owner	Critical	Days Late	Baselined	Start
(Blinded) Data Review Meeting	R&D NPD SET P...			104		7/14/2023
(Blinded) Data Review Meeting	R&D NPD SET P...			0		12/30/2025
1st DRAFT CSR	R&D NPD SET P...			0		5/1/2029
1st DRAFT CSR	R&D NPD SET P...			0		8/7/2029
1st Draft Protocol Available	R&D NPD CTS P...			801		8/16/2021
1st Draft Protocol Available	R&D NPD DM PL...			0		8/16/2021
1st Draft Protocol Available	R&D NPD SET P...			801		8/16/2021
1st GMP Batch Release	R&D NPD Progr...			91		7/27/2023
1st IRB/IEC Approval	R&D NPD SET P...			457		7/26/2022
1st IRB/IEC Submission	R&D NPD SET P...			503		6/10/2022
1st Regulatory Approval	R&D NPD SET P...			461		7/22/2022
1st Regulatory Submission	R&D NPD SET P...			491		6/22/2022
1st Site Greenlight Approval for IMP ReL...	R&D NPD CTS P...			442		8/10/2022
1st Site Greenlight Approval for IMP ReL...	R&D NPD SET P...			429		8/23/2022

Scorecard

To dos & Tasks & Milestones

Risks & Issues & Changes

Board View

Calendar View

Gantt View

Work Risk Issue and Change

You are viewing 3,637 work item(s)
 Last Refreshed: 11/13/2023 1:31:19 PM

Resource Manager, Resource: All | Investment Manager: All | Investment: All

Select all | Overdue | Next 7 Days | Later | Completed

Risks

Risks	Priority	OPEN/WIP
128	24	121

Risk	Investment	Owner	Due Date	Status	Probability	Impact	Priority
A real risk	My Project Req...	Administrato...	5/10/2023	Open	High	Low	★
Another Real risk	My Project Req...	Administrato...	5/10/2023	Open	Low	High	★
Architect going ou...	Redefining Trad...	Pokorny, Mike	11/7/2022	Resolved	High	Low	★
AWS Contract	Minimal Online ...	Cooper, Andy	6/11/2019	Open	High	Medium	★
Base Architecture	Data Warehous...	Thompson, P...	7/13/2019	Open	Medium	Medium	★
Budget Approval	Apollo Product ...	Parks, Micha...	6/11/2019	Open	Medium	High	★
Call Center analyt...	CRM Contact C...	Thompson, P...	8/21/2019	Open	Medium	Low	★
Call Center analyt...	Lumen Test	Thompson, P...	8/21/2019	Open	Medium	Low	★
Company Reorg c...	NPD: High Effici...	Pokorny, Mike	8/14/2022	Work in P...	Medium	Medium	★
Concerns about m...	Global HR Appli...	Morris, Tom	9/17/2019	Open	Low	Medium	★
Could be late	eCommerce AI ...	Administrato...	6/7/2023	Open	Low	Low	★
Could be late	eCommerce Po...	Administrato...	6/7/2023	Open	Low	Low	★

Change Requests

Change Requests	Priority	Review in Next 7 Days
57	9	0

Change Request	Investment	Owner	Status	Priority
A location lead	Lost Device	Administrator, Clarity	Open	★
Add additional scope	Billing Self Service Signup	Administrator, Clarity	Open	★
Add additional scope	Financial Plans - Training	Administrator, Clarity	Open	★
Additional equipment	Online Web Portal Program	Granger, Paula	Open	★
Additional Funding	CRM Contact Center Developm...	Adams, Benjamin	Work in Progress	★
Additional Funding	Lumen Test	Adams, Benjamin	Work in Progress	★
Additional funding again...	CRM Contact Center Developm...	Administrator, Clarity	Open	★
Additional funding again...	Lumen Test	Administrator, Clarity	Open	★
Additional product testing	Apollo Product Launch	Parks, Michael	Open	★
Additional resources	Online Web Portal Program	McCarthy, John	Open	★
Additional Sales Analytics	eCommerce AI Initiative	Martin, Paul	Work in Progress	★
Additional Sales Analytics	eCommerce Portal	Martin, Paul	Work in Progress	★
Adjust budget to accommodate change ...	Analytics Target Report	Martin, Paul	Work in Progress	★
Adjust Scope	Radiation Oncology Varian Upg...	Hensel, Ross	Work in Progress	★
Amendment 3	MIT AARD Payments Modules (...)	Administrator, Clarity	Open	★
asdfsdfasdf	Financial Budgeting	Abbott, Karl	Open	★
AWS Contract	Minimal Online Shopping Site	Cooper, Andy	Open	★
Change Application	Reduced Purchase/Payment C...	Thomas, Brian	Open	★
Change Budget	Credit Card Security Improve...	Administrator, Clarity	Open	★
Change in scope	Automation & Robotics	Administrator, Clarity	Open	★
Change in scope	Automation & Robotics	Administrator, Clarity	Open	★
Change in scope	Automation & Robotics feature...	Administrator, Clarity	Open	★
Change Request 1	Introduce Self Service Portal	Thomas, Brian	Open	★
Database Conversion	Web Application Enhancement	Sutherland, Joy	Work in Progress	★
Delay Release Date by Two Months	Data Warehouse Performance ...	Administrator, Clarity	Open	★
Development Phase Extension Request	Web Application Enhancement	Sutherland, Joy	Open	★
Expanded Scope	iSeries Location Tracking	McCoubrie, Wes	Open	★
Found 1 Device	Lost Device	Administrator, Clarity	Open	★
Funding for contractors	Online Web Portal Program	Martin, Paul	Open	★
Funding issue - request additional fun...	Minimal Online Shopping Site	Granger, Paula	Open	★
Hire additional SMEs	CRM Contact Center Developm...	Administrator, Clarity	Open	★
Hire additional SMEs	Lumen Test	Administrator, Clarity	Open	★
Increase Funding	iSeries Location Tracking	Pokorny, Mike	Open	★
Need additional budget for new testing...	Analytics Target Report	Administrator, Clarity	Work in Progress	★
Need More F...	Finance Report Phase	Thomas, Brian	Open	★

Issues

Issues	Priority	No Resolution
106	23	99

Issue	Investment	Owner	Due Date	Status	Priority	Resolution	Impa
401K benefits are ...	HR Online Benefits S...	Morris, Tom	8/16/2019	Work in Pro...	★	8/27/	
Accept all possible...	eCommerce AI Initia...	Martin, Paul	8/30/2019	Open	★	9/6/2	
Accept all possible...	eCommerce Portal	Martin, Paul	8/30/2019	Open	★	9/6/2	
Advanced reportin...	CRM Enhancements	Thompson, Peter	7/19/2019	Work in Pro...	★	7/26/	
Application Closes ...	System Upgrade Rel...	Paxton, Robyn	8/17/2019	Work in Pro...	★	10/1/	
AWS Contract	Minimal Online Shop...	Cooper, Andy	6/17/2019	Open	★	6/21/	
Budget Issue	Reduced Purchase/P...	Thomas, Brian	7/4/2019	Open	★	7/4/2	
Business Unit appl...	Alpha Product Phas...	Morris, Tom	8/1/2019	Resolved	★	8/8/2	
Cannot execute wit...	MIT AARD Payments...	Hensel, Ross	5/30/2019	Open	★	5/30/	
Change managem...	Compliance Audit - ...	Morris, Tom	8/17/2019	Work in Pro...	★	8/24/	
Circuit Board sche...	NPD: High Efficiency ...	Pokorny, Mike	8/15/2022	Resolved	★	8/17/	
Critical resource is...	eCommerce AI Initia...	Morris, Tom	7/18/2019	Open	★	8/1/2	
Critical resource is...	eCommerce Portal	Morris, Tom	7/18/2019	Open	★	8/1/2	
Delay on server in	Upgrade SAP Priort	Administrator, Cl...	9/19/2023	Open	★	9/19/	

Scorecard
To dos & Tasks & Milestones
Risks & Issues & Changes
Board View
Calendar View
Gantt View

Board View

You are viewing **3,637** work item(s)
 Last Refreshed: 11/13/2023 1:31:19 PM

Resource Manager, Resource | Investment Manager | Investment

All | All | All

**On this page, Tasks are by Owners not Assignees

Work Management by Resource Manager and Resource

Bucket: Overdue (Red), Later (Blue), Completed (Green)

Resource Manager	Overdue	Later	Completed
(Blank)	5	0	0
Administrator, Clarity	178	7	46
Hensel, Ross	80	11	70
Joseph, Derrick	25	5	0
Kumar, Arun	8	0	0
Lewis, Dana	10	0	0

Work Management by Investment Manager

Bucket: Completed (Green), Later (Orange), Next 7 Days (Blue), Overdue (Red)

Investment Manager	Overdue	Later	Next 7 Days	Completed
Administrator, Cl...	0.9K	0	0	0
McCoubrie, Wes	0.8K	0.2K	0	0
(Blank)	0.6K	0	0	0
Martin, Paul	0.4K	0	0	0
Pokorny, Mike	0.2K	0	0	0
Thomas, Brian	0.2K	0	0	0

Not Started

To Dos	Tasks/Milestones	Risk/Issues/Changes
0	3,625	0

Name	Owner	Priority	Due Date
Task IBlinded Data Review ...		☆	Sunday, July 16, 2023
Task IBlinded Data Review ...		☆	Tuesday, December 30, 2022
Task 1st IP Shipment to stud...		☆	Tuesday, August 16, 2022
Task 1st Subj. Enrolled		☆	Sunday, August 14, 2022
Task 1st Subj. Enrolled		☆	Thursday, December 28, 20...
Task 1st Subj. Randomized		☆	Monday, August 15, 2022
Task 1st Subj. Randomized		☆	Sunday, December 31, 2023
Task 22		☆	Tuesday, May 09, 2023
Task 2nd DRAFT Protocol Av...		☆	Sunday, August 15, 2021
Task 2nd Programmer and D...		☆	Sunday, June 12, 2022
Task 2nd Programmer and D...		☆	Tuesday, June 21, 2022
Task 2nd programmer and D...		☆	Monday, May 30, 2022
Task 2nd programmer and D...		☆	Monday, June 20, 2022
Task 6 monthly line listing (6...		☆	Saturday, September 10, 20...
Task 6 monthly line listing (6...		☆	Saturday, January 27, 2024
Task AB Team		☆	Tuesday, September 24, 20...

Started

To Dos	Tasks/Milestones	Risk/Issues/Changes
222	352	274

Name	Owner	Priority	Due Date
To Do 1	Lasso, Ted		Thursday, October 06, 20...
To Do 1234	Adams, Benj...		Tuesday, November 21, 2
To Do 2	Lasso, Ted		Thursday, October 13, 20...
To Do 3	Lasso, Ted		Thursday, November 24,
To Do AARD needs to do this f...	Abbott, Karl		Friday, July 07, 2023
To Do All Documents Submitt...			
To Do All Documents Submitt...	Avengers Te...		
To Do Allocations Review			
To Do Allocations Review			
To Do Allocations Review			
To Do Archive all project docu...	Abbott, Karl		Thursday, April 13, 2023
To Do Attend Booking Call			
To Do Book a meeting	Abbott, Karl		
To Do Book flight	Administrat...		Saturday, June 04, 2022
To Do Book Meeting			
To Do Book Meeting			
To Do Book planning meeting			

Completed/Resolved/Closed/Blocked

To Dos	Tasks/Milestones	Risk/Issues/Changes
21	122	17

Name	Owner	Priority	Due Date
Issue Business Unit applicati...	Morris, Tom	☆	Wednesday, July 31, 201
Issue Circuit Board schematic...	Pokorny, Mike	☆	Sunday, August 14, 2022
Issue Contractor contract end...	Hazelzet, Br...	☆	Wednesday, November 3
Issue Funding is being reduced	Berry, Jason	☆	Thursday, July 18, 2019
Issue Licensing	Hensel, Ross	☆	Saturday, February 25, 2
Issue Portlet for Customer Ac...	Morris, Tom	☆	Tuesday, September 24,
Issue Resource conflicts	Johnson, Eric	☆	Monday, August 19, 2019
Issue Scheduled downtime	Morris, Tom	☆	Wednesday, July 31, 201
Issue System Architecture is ...	Morris, Tom	☆	Thursday, August 15, 20
Mile 1st Draft Protocol Avail...			Sunday, August 15, 2021
Mile Analyze Phase Complete			Tuesday, November 30, 2
Mile Approval to proceed			Thursday, March 17, 202
Mile Business Case Approva...	Lewis, Dana		Tuesday, May 28, 2019
Mile Closing Gate	Lewis, Dana		Wednesday, November 1
Mile Closing Phase Gate Co...			Wednesday, January 19,
Mile Closing Phase Gate Co...			Wednesday, April 27, 20...

Scorecard

To dos & Tasks & Milestones

Risks & Issues & Changes

Board View

Calendar View

Gantt View

Calendar View

You are viewing 575 work item(s)
Last Refreshed: 11/13/2023 1:31:19 PM

Resource Manager: Resource
Investment Manager
Investment

Task	To Do	Milestone	Issue	Risk	Change
290	274	162	10	7	0

Select all Overdue Next 7 Days Later Completed
Priority Status Owner Bucket

Due Date: 10/30/2016 7/7/2031

**On this page, Tasks are by Owners not Assignees

Status ● Open ● Completed ● Blocked ● Started ● Not Started ● Resolved ● Closed

< > Today **July 2023** Month Week Day List

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
Email						
Datasecurity - Integration Project						
CL - Digitizing Paper Records with Optical Character Recognition						
Administration						
PTO						
Compliance Audit - Security						
Increase Average Contract Discount Product						
NS1B						
New Email Archival Repository Project						
AS Services						
Training						
New Task						
Claims Application						
Relocation of Neuropsychology Program						
Complete Project Plan						
CL - Digitizing Paper Records with Optical Character Recognition						
Mobile Planner V3						
Project Management Costs						

Scorecard To dos & Tasks & Milestones Risks & Issues & Changes Board View **Calendar View** Gantt View

Gantt View

You are viewing 575 work item(s)
 Last Refreshed: 11/13/2023 1:31:19 PM

Resource Manager: Resource
 Investment Manager
 Investment

All All All

Task	To Do	Milestone	Issue	Risk	Change
290	274	162	10	7	0

Select all Overdue Next 7 Days Later Completed

Due Date: 10/30/2016 7/7/2031

**On this page, Tasks are by Owners not Assignees

Legend: Blocked Closed Completed Not Started Open Resolved Started

Type	Name	Owner	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Nov 2024	Dec 2024	Jan 2025	Feb 2025
Issue	Business Unit application managers	Morris, Tom															
Issue	Circuit Board schematic has been de...	Pokorny, Mike															
Issue	Contractor contract ending	Hazelzet, Brian															
Issue	Funding is being reduced	Berry, Jason															
Issue	Licensing	Hensel, Ross															
Issue	Portlet for Customer Accounts	Morris, Tom															
Issue	Resource conflicts	Johnson, Eric															
Issue	Scheduled downtime	Morris, Tom															
Issue	System Architecture is non-compliant	Morris, Tom															
Milestone	(Blinded) Data Review Meeting	(Blank)															
Milestone	1st DRAFT CSR	(Blank)															
Milestone	1st Draft Protocol Available	(Blank)															
Milestone	Adjudication Committee	(Blank)															
Milestone	All CSRs submitted to ECs as requir...	(Blank)															
Milestone	All CSRs submitted to RAs as requir...	(Blank)															
Milestone	All End of Trial Notification (EoTN)...	(Blank)															
Milestone	All End of Trial Notifications (EoTN)...	(Blank)															

Scorecard To dos & Tasks & Milestones Risks & Issues & Changes Board View Calendar View Gantt View

Portfolio

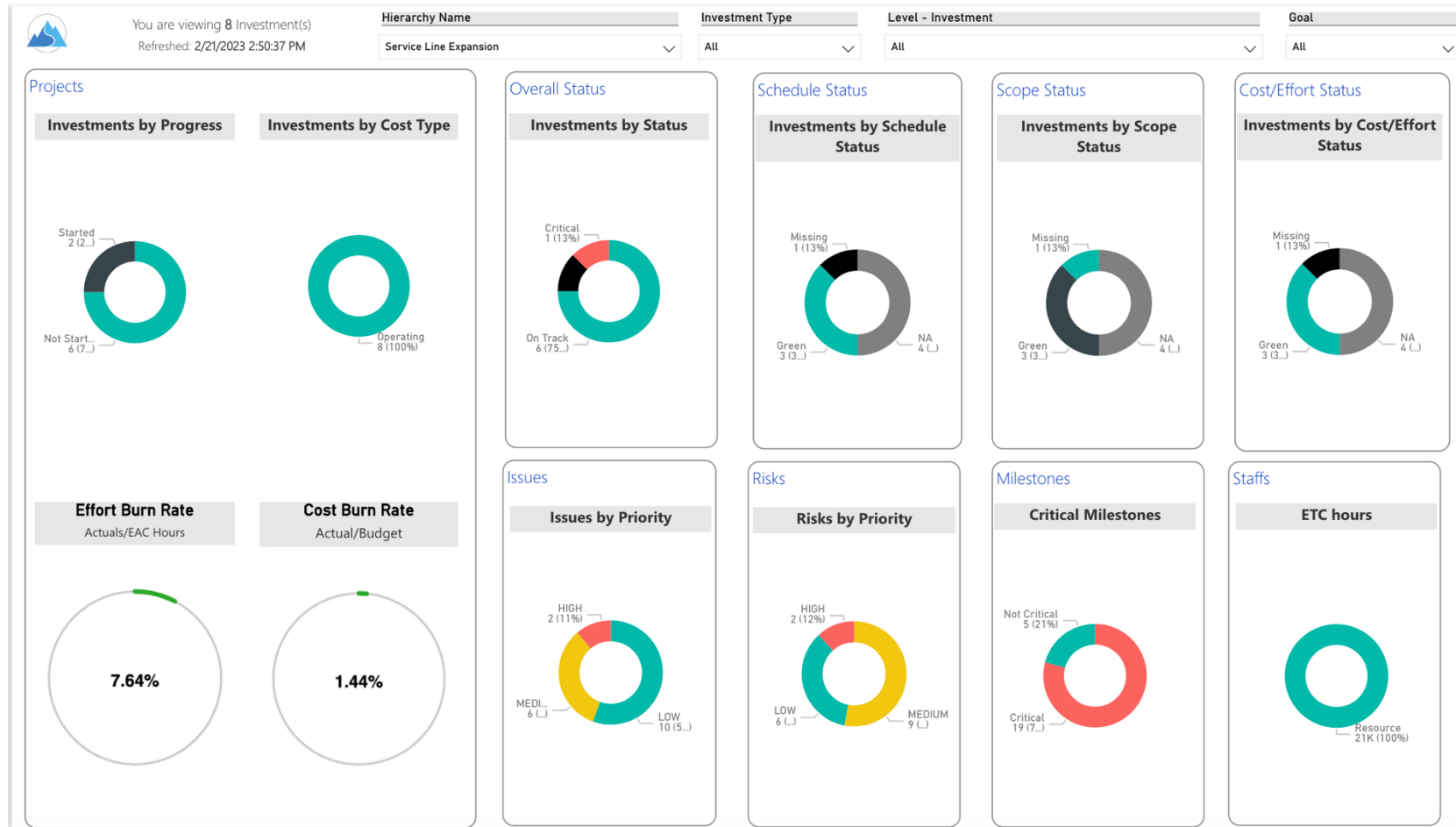
Investments and Hierarchy



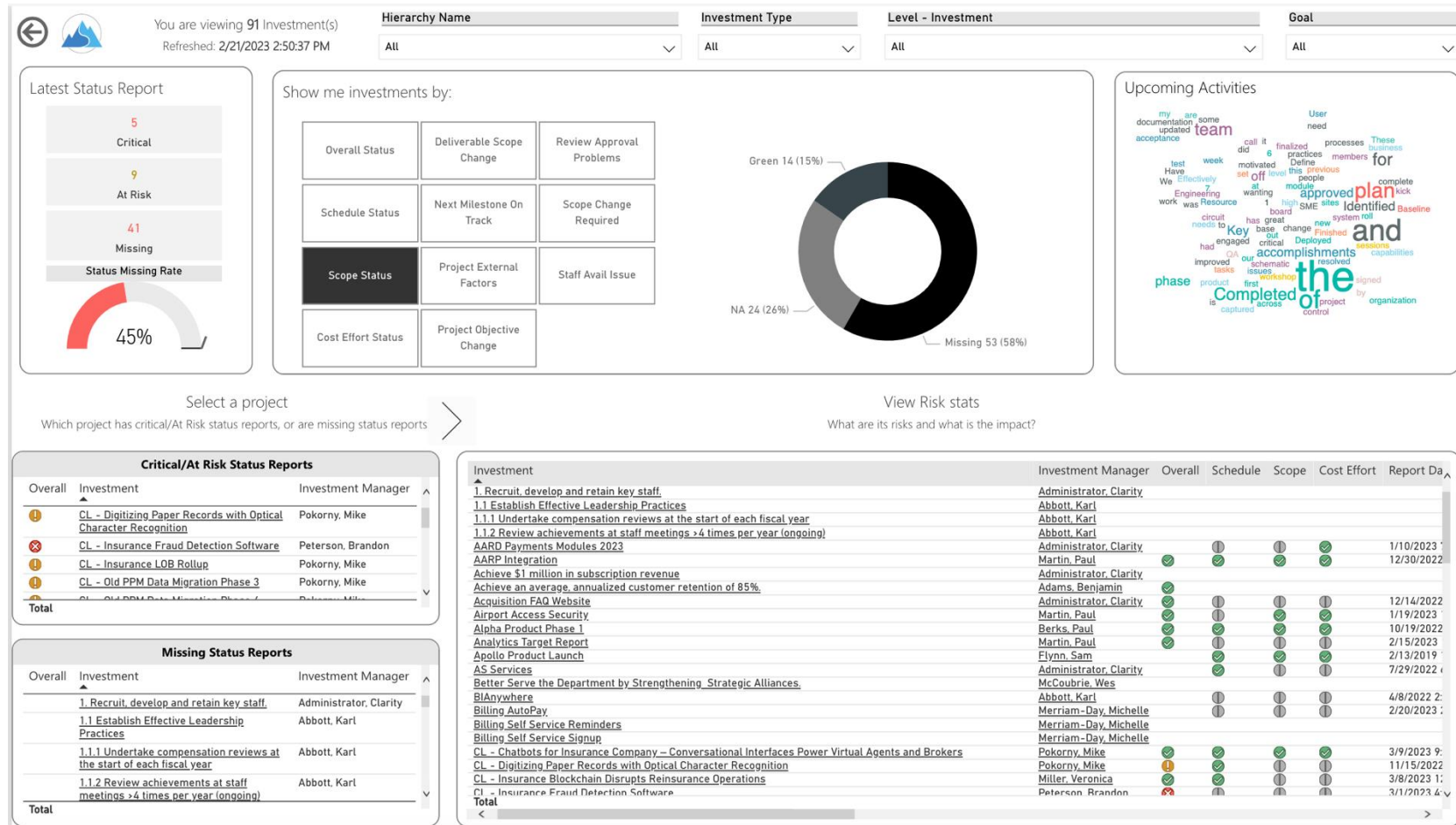
regoUniversity

KANSAS CITY • 2024

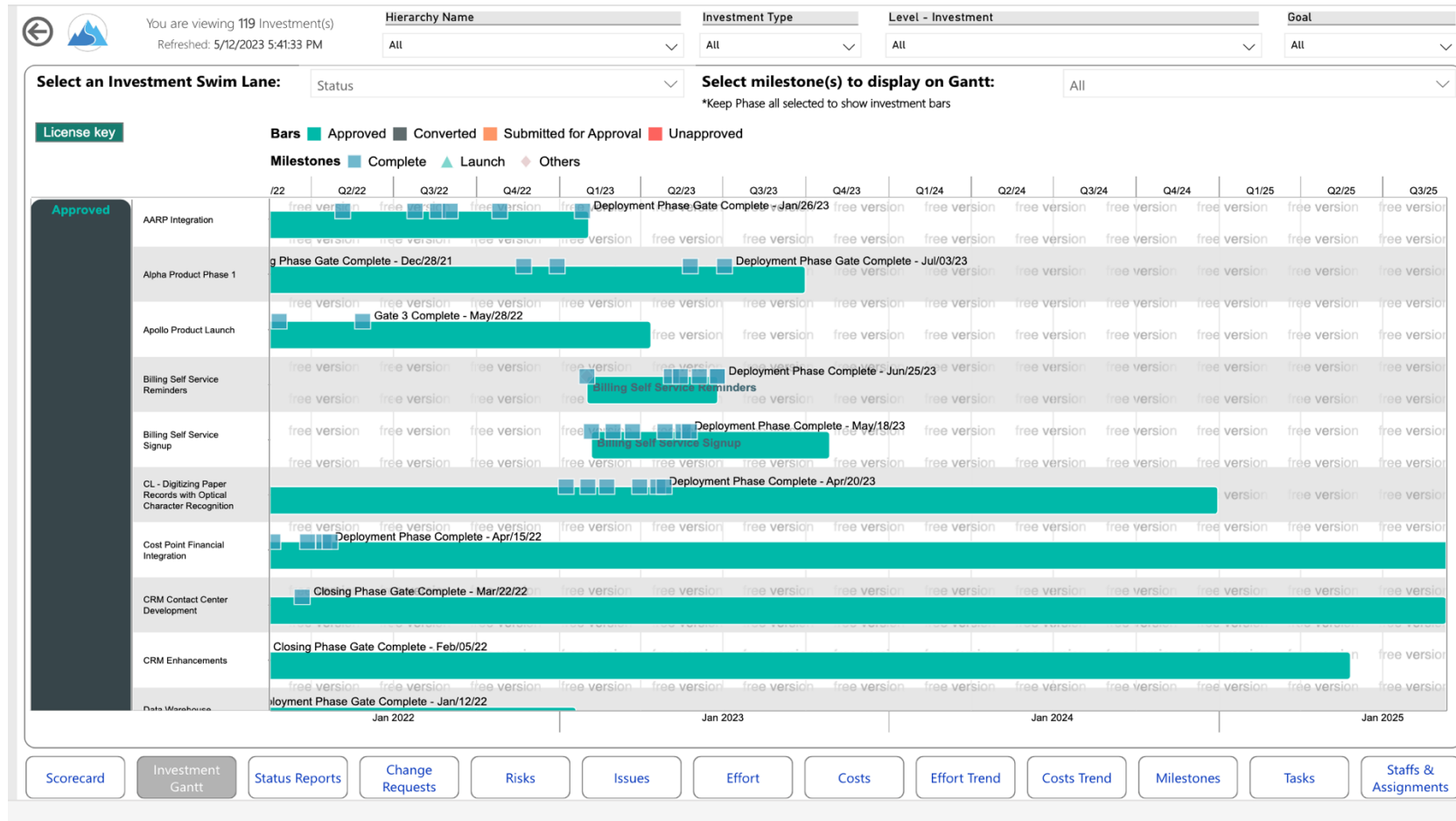
Hierarchy Summary



Status Report Summary



Investment Gant



Investment Drill thru

Last refreshed: 5/12/2023
5:41:33 PM

You are viewing investment: **MIT AARD Payments Modules (Do not Touch)**
Investment Manager is: **Lewis, Dana**

Overall Status	Schedule Status	Scope Status	Cost & Effort	Actual Total Cost	Capital Cost	Operating Cost
On Track	NA	Green	Green	\$67,424 (99.7%) (-\$21,103.039) vs Budget	\$36,560 (95.7%) (-\$814,724) vs Budget	\$30,864 (99.8%) (-\$20,288,316) vs Budget
Start Date	Finish Date	Baseline Start	Baseline Finish			
03-Jun-19	09-Sep-25	03-Jun-19	30-Dec-22			

Report Date	Report Update	Upcoming Activities	Key Accomplishments
12/6/2022	QA completed last week. project is on track and under budget.	Upgrading to version 34.2 next week.	QA completed and signed off by team.

Build your own Task and Milestone Gantt! Select a swim lane:

Legend: Milestone (diamond), Baseline (triangle)

Risk

Risk	Priority	Impact	Probability	Owner	Status	Due Date
Reduced Funding could impact delivery	☆	1.00	1.00	Abbott, Karl	OPEN	5/29/2019
Dependency on other teams for DB work	☆	1.00	3.00	Abbott, Karl	OPEN	5/29/2019
Team may not be able to continue supporting this app due to resource constraints	★	3.00	3.00	Amos, Cheryl	OPEN	5/29/2019

Issue

Issue	Priority	Owner	Status	Due Date	Res
Cannot execute without the Team B work being completed	☆	Administrator, Clarity	OPEN	5/30/2019	
Contractor contract ending	☆	Hazelzet, Brian	RESOLVED	12/1/2022	Con
De-prioritization due to strategic alignment shifts	☆	Administrator, Clarity	WORK_IN_PROGRESS	4/29/2020	

Resource Allocation

Resource	Apr-21	Apr-22	Apr-23	Apr-24	Apr-25	Aug-20	Aug-21	Aug-22	Aug-23	Aug-24	Aug-25	Dec-2
Abbott, Karl	27.50					26.25		26.14				28
Admin, PMO	14.40	09.20	104.00	14.40	14.40	09.20	14.40	19.60	19.60	14.40	09.20	19
Admin, Rego	176.00	168.00	180.00	238.53	176.00	188.00	176.00	184.00	184.00	176.00	188.00	188
Administrator, Clarity												
Amos, Cheryl												
Total	2,209.90	1,999.20	2,304.00	2,596.93	2,534.40	2,109.45	2,094.40	2,178.94	2,649.60	2,534.40	2,419.20	2,310

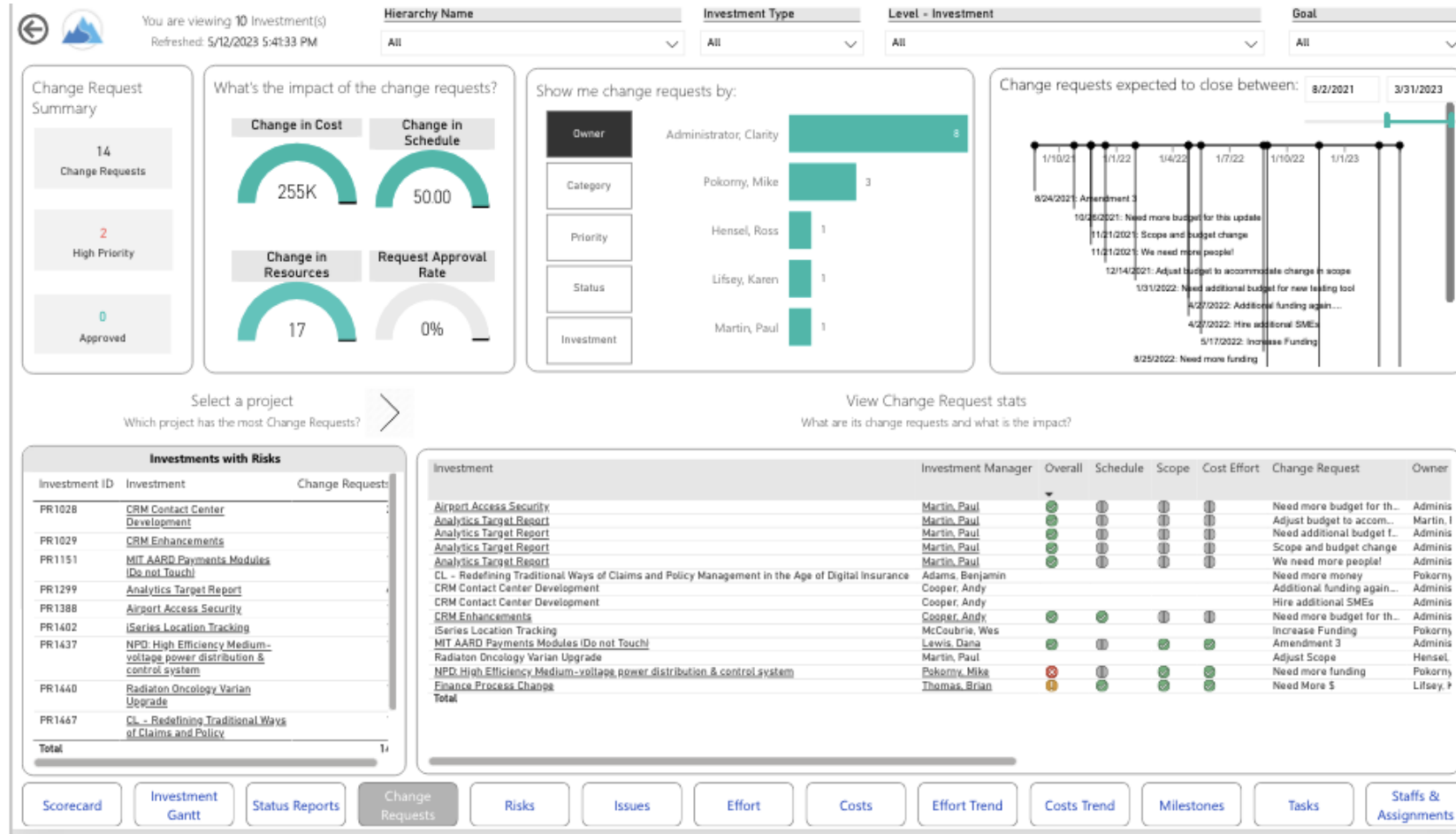
Change Request

Change Request	Priority	Owner	Expected Close Date	Reasons	Impact on Projects
Amendment 3	★	Administrator, Clarity	8/24/2021		
We have to get this schedule changed.	☆	Administrator, Clarity	4/29/2020		

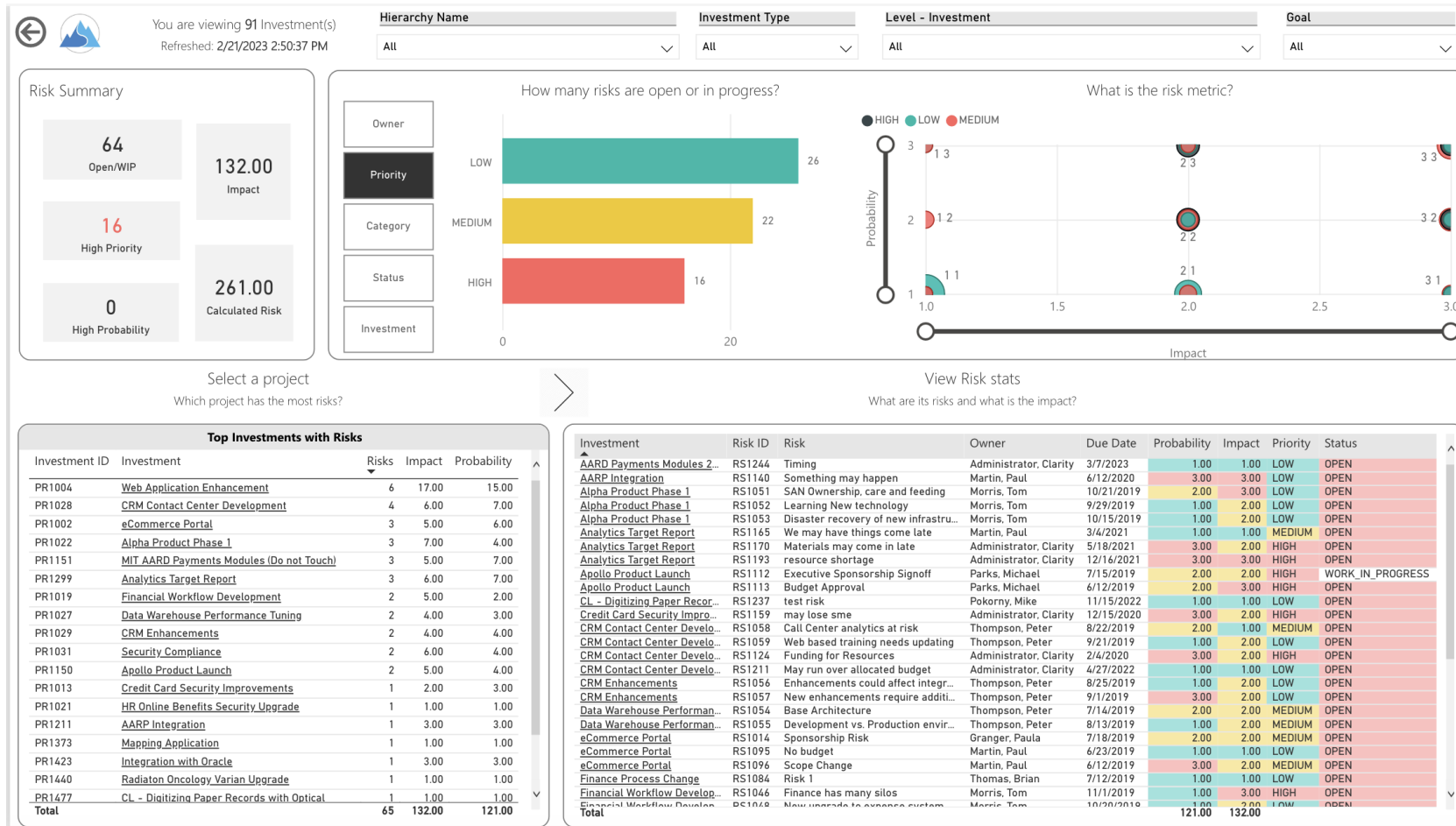
Scorecard | Investment Gantt | Status Reports | Change Requests | Risks | Issues | Effort | Costs

Effort Trend | Costs Trend | Milestones | Tasks | Staffs & Assignments

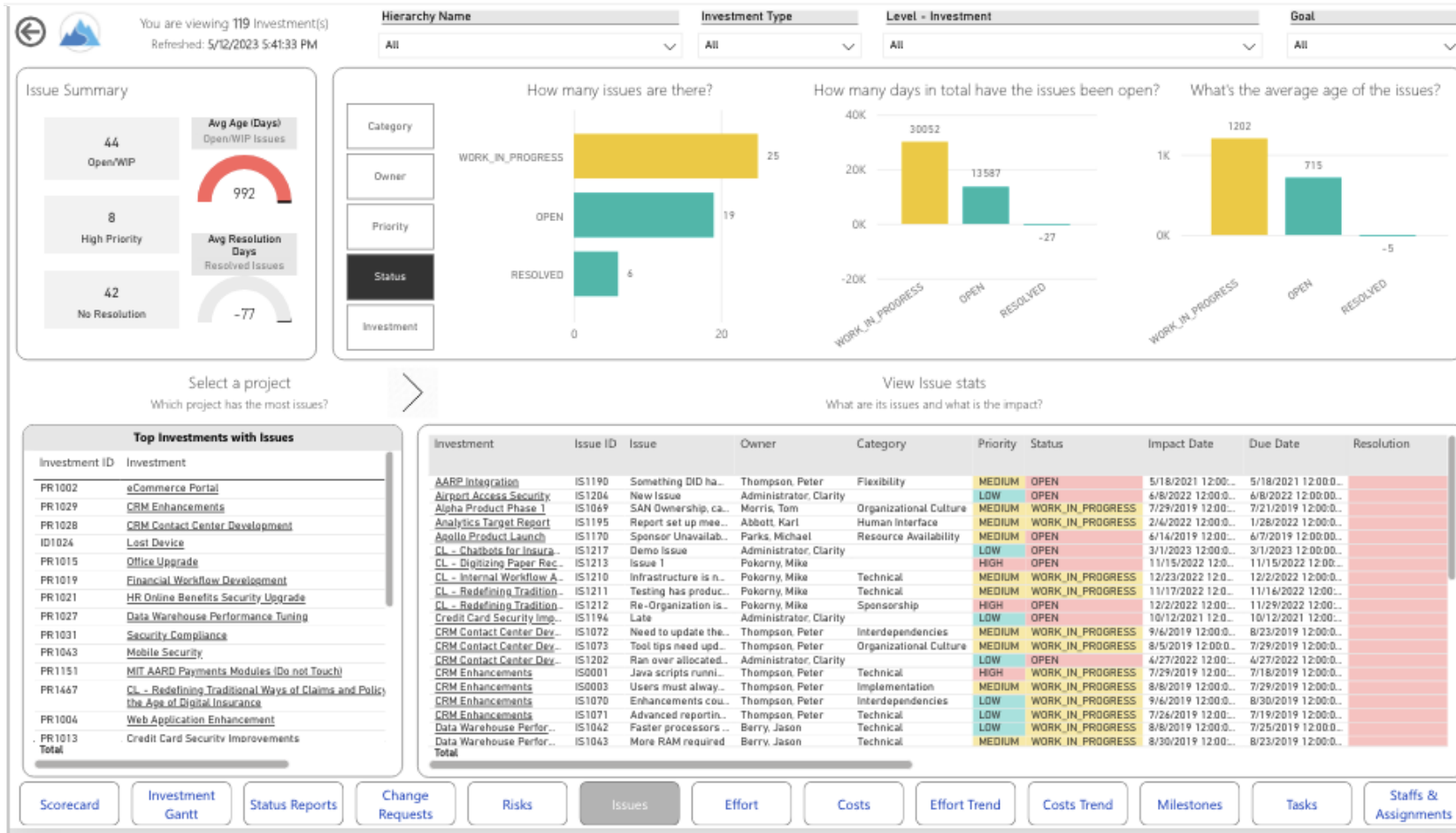
Change Requests



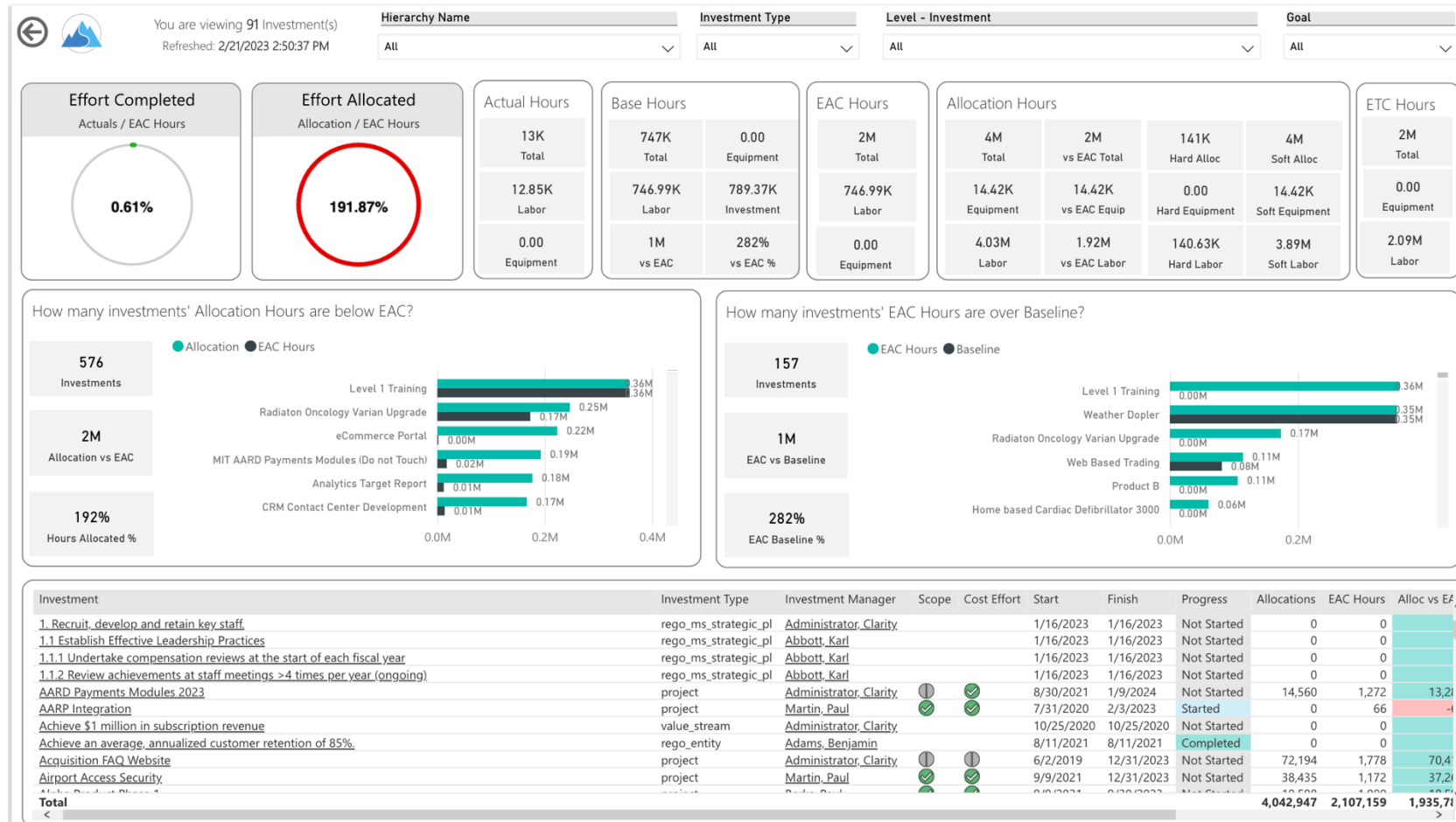
Risk Summary



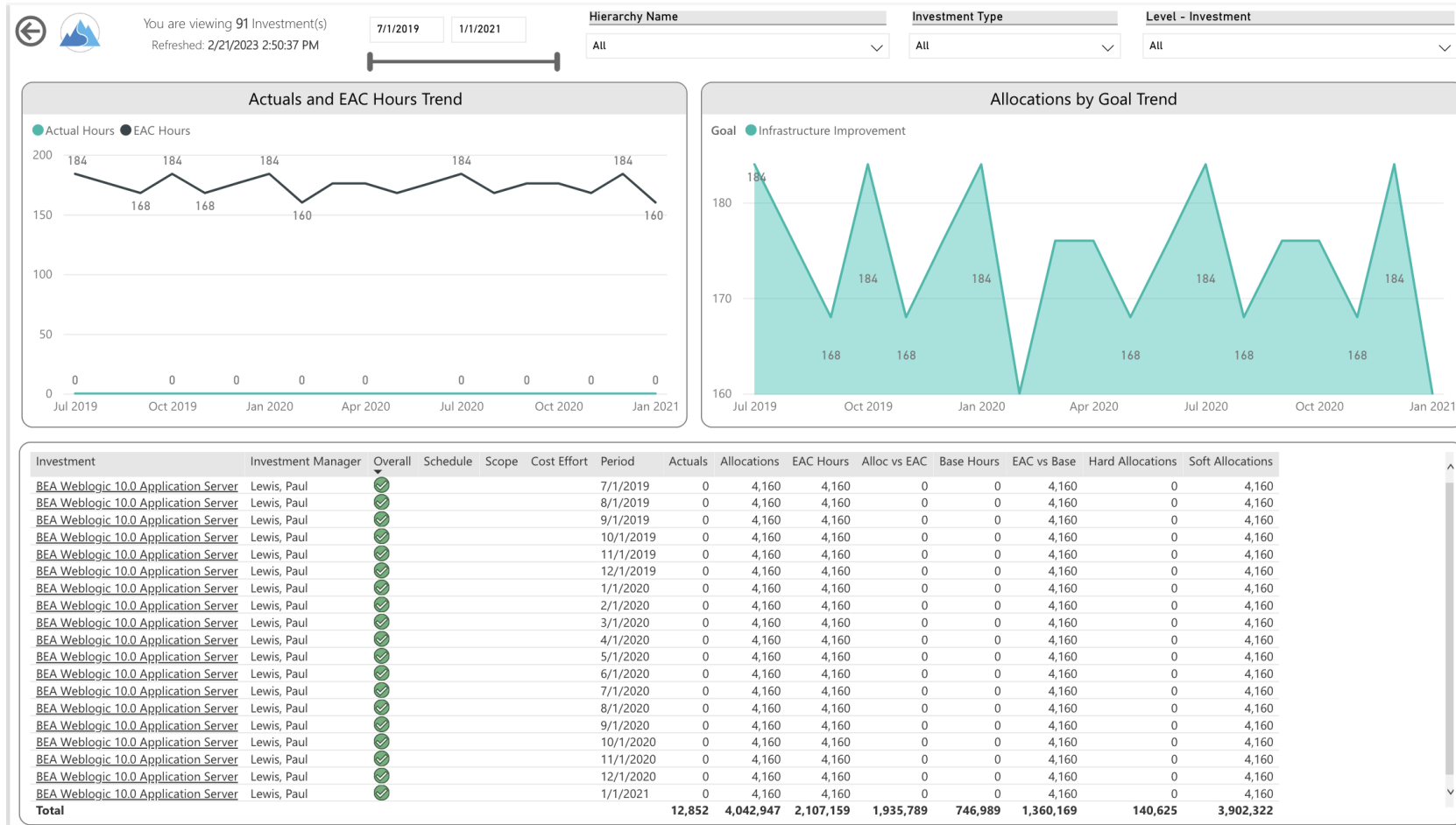
Issue Summary



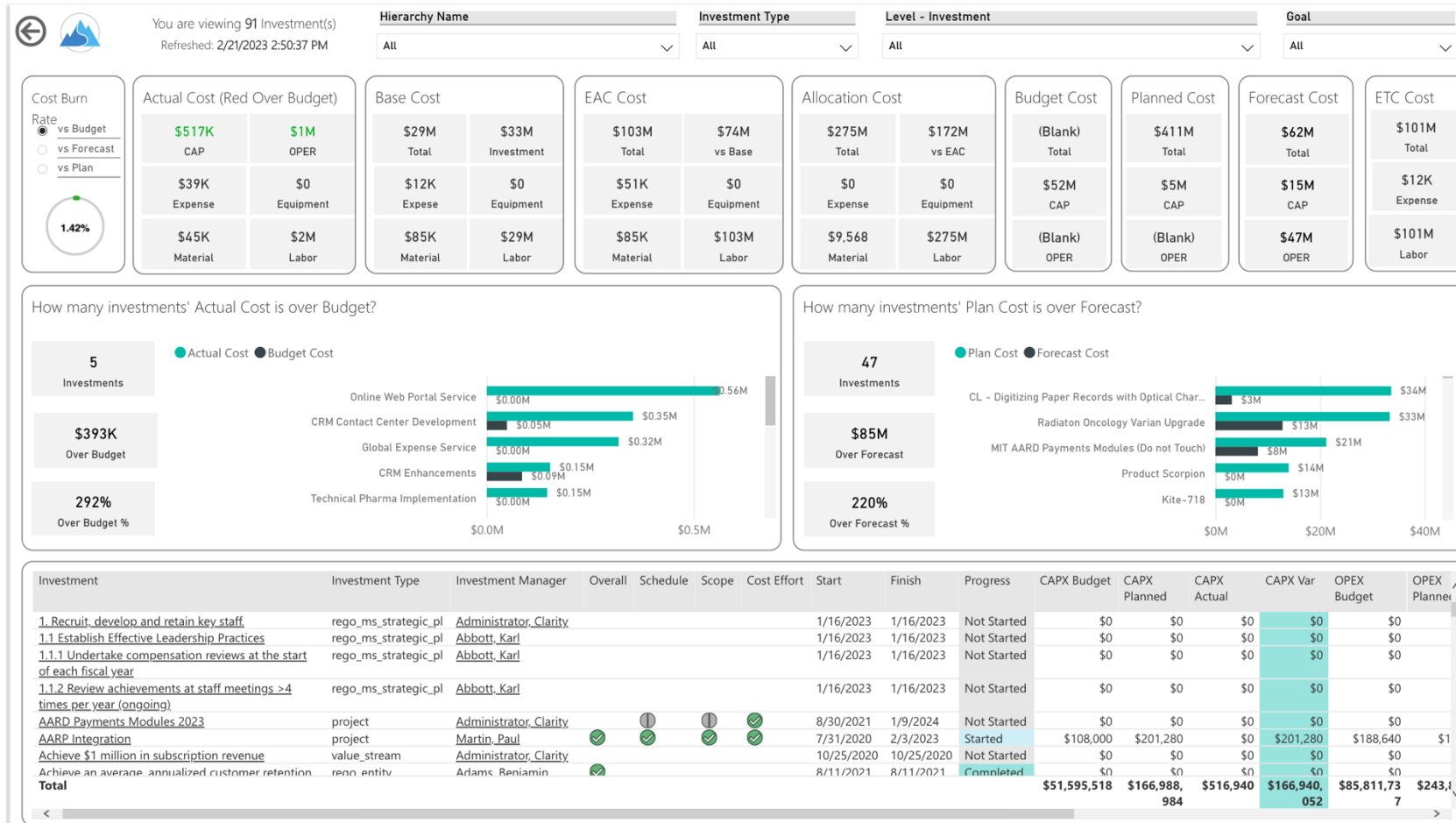
Effort



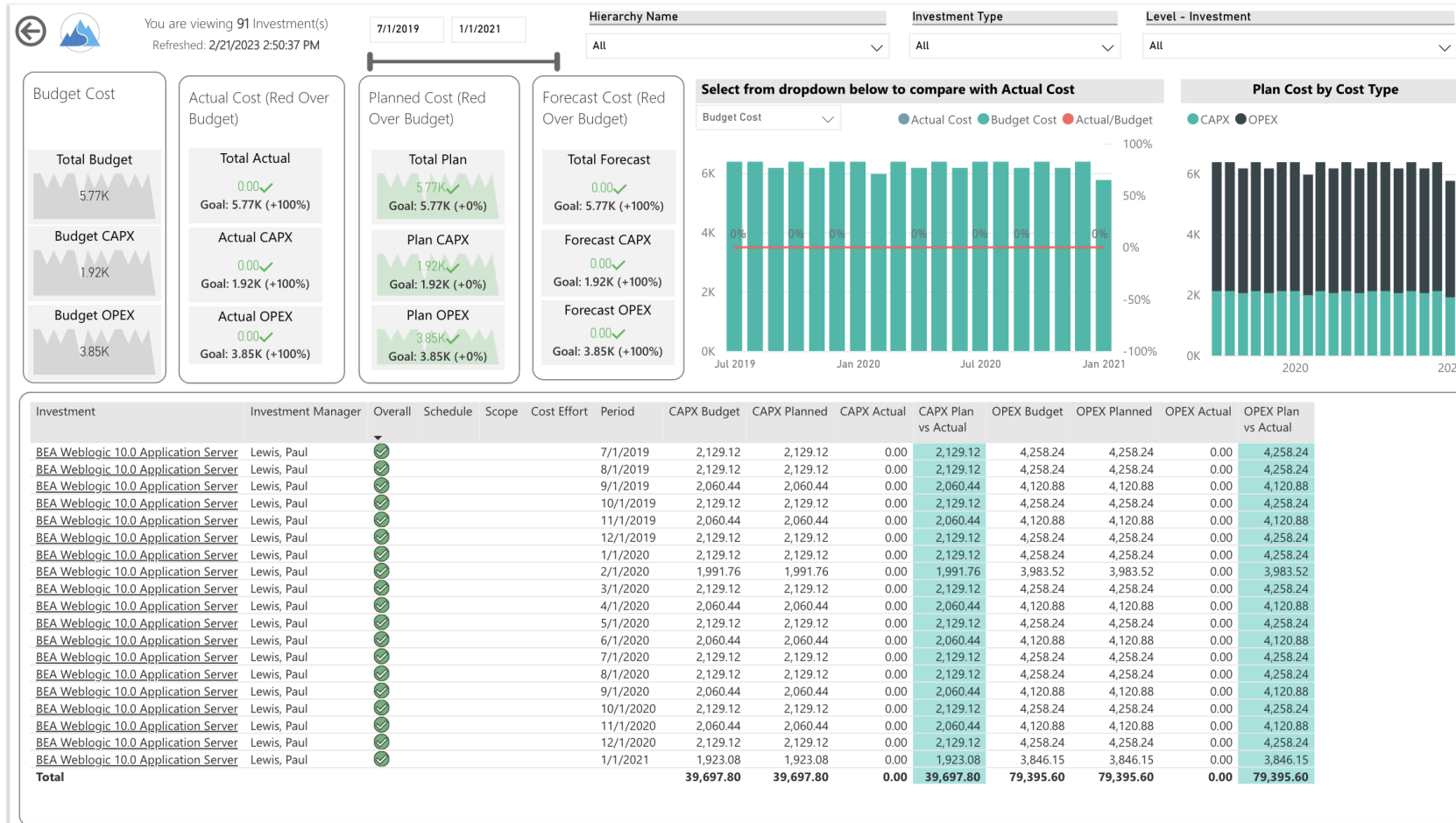
Effort Trend



Cost



Cost Trend



Milestones

You are viewing 91 Investment(s)
Refreshed: 2/21/2023 2:50:37 PM

Hierarchy Name
All

Investment Type
All

Level - Investment
All

Goal
All

Critical?
All

Milestone Summary

1,119
Late Milestones

Avg Days Late
Open Milestones

300

353
Critical

Milestone Completion Rate

5%

364
High Priority

Upcoming Milestones in:

>90 Days

15
Off Track

30 Days

194
At Risk

60 Days

0
On Track

90 Days

Investment	Milestone	Status	Owner	Days Late	Baselined	Start	Compl
Alpha Product Phase...	Construction Phase Gate...	●		541	✓	5/26/2023	
Alpha Product Phase...	Deployment Phase Gate ...	●		558	✓	7/3/2023	
Billing AutoPay	Closing Process Comple...	●		0		5/31/2023	
Billing AutoPay	Construction Phase Com...	●		0		5/4/2023	
Billing AutoPay	Deployment Phase Com...	●		0		5/24/2023	
Billing Self Service R...	Closing Process Comple...	●		0	✓	6/25/2023	
Total				2,694			

Upcoming Milestones by Status

Status ● Red ● Yellow

Select a project

Which project has the most milestones?

View milestone stats

What are its milestones and what is the impact?

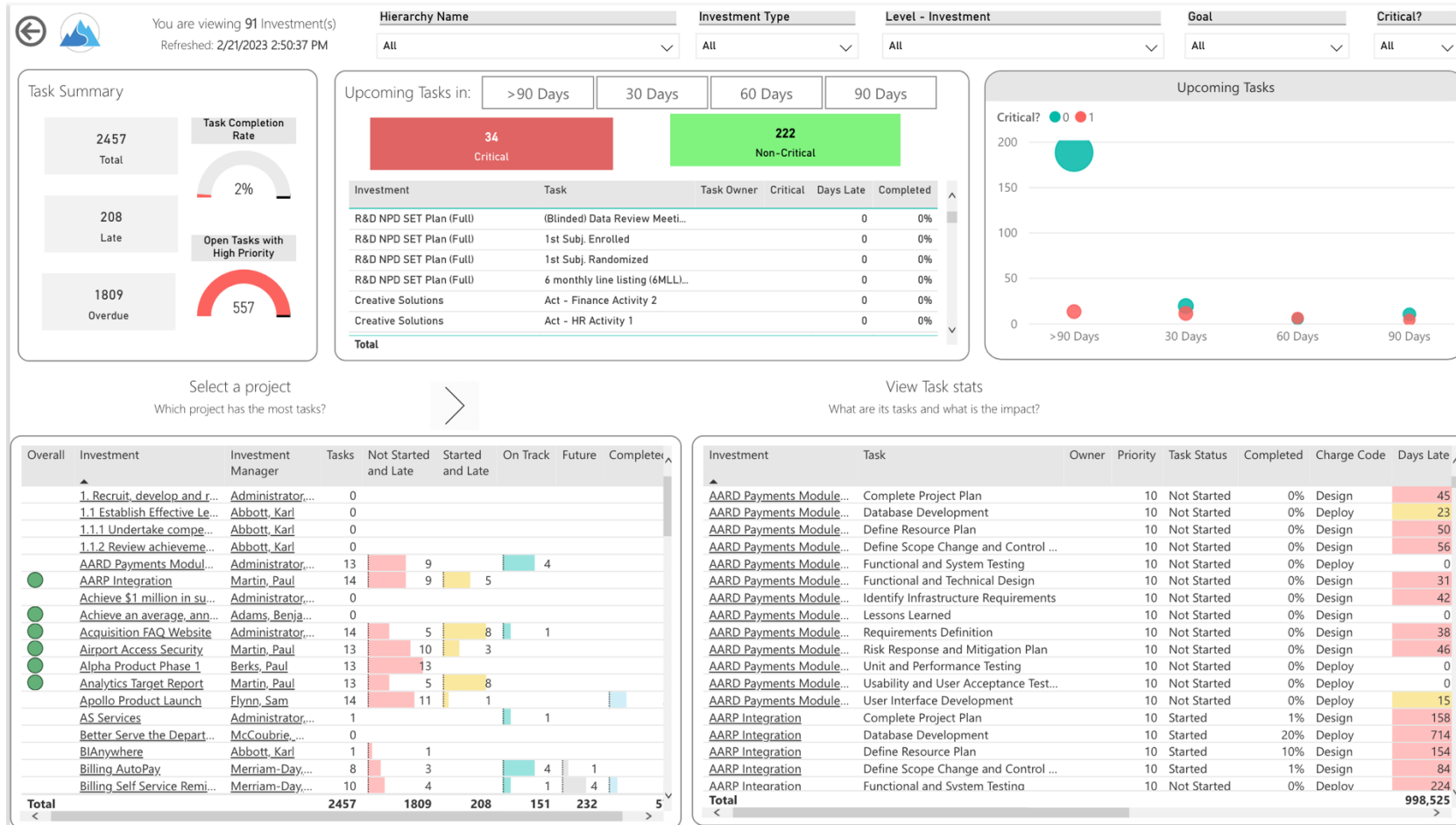
Overall Investment

- Billing Self Service Reminders
- Radiation Oncology Varian Upgrade
- AARD Payments Modules 2023
- Billing AutoPay
- Billing Self Service Signup
- Cost Point Financial Integration
- iSeries Registration App
- CL - Digitizing Paper Records with Optical Character Recognition
- Mapping Application
- CL - Insurance Fraud Detection Software
- AARP Integration
- Acquisition FAQ Website
- Airport Access Security
- Alpha Product Phase 1
- Analytics Target Report
- CL - Chatbots for Insurance Company - Conversational Interfaces Power Virtual Agents and
- CL - Insurance Blockchain Disrupts Reinsurance Operations
- CL - Internal Workflow Automation with RPA and Machine Learning

Total

Investment	Milestone	Owner	Baselined	Critical	Status	Start	Finish
AARD Payments Modules 2023	Closing Phase Gate Complete			●	Not Started	4/17/2023	4/17/2023
AARD Payments Modules 2023	Construction Phase Gate Complete			●	Not Started	3/16/2023	3/16/2023
AARD Payments Modules 2023	Deployment Phase Gate Complete			●	Not Started	4/11/2023	4/11/2023
AARD Payments Modules 2023	Design Phase Gate Complete			●	Not Started	2/7/2023	2/7/2023
AARD Payments Modules 2023	Initiating Process Complete			●	Not Started	1/10/2023	1/10/2023
AARD Payments Modules 2023	Planning Phase Gate Complete			●	Not Started	1/24/2023	1/24/2023
AARP Integration	Closing Phase Gate Complete		✓	●	Started	10/27/2022	10/27/2022
AARP Integration	Construction Phase Gate Complete		✓	●	Not Started	8/19/2022	8/19/2022
AARP Integration	Deployment Phase Gate Complete		✓	●	Not Started	1/27/2023	1/27/2023
AARP Integration	Design Phase Gate Complete		✓	●	Not Started	9/2/2022	9/2/2022
AARP Integration	Initiating Process Complete		✓	●	Not Started	7/25/2022	7/25/2022
AARP Integration	Planning Phase Gate Complete		✓	●	Started	5/6/2022	5/6/2022
Acquisition FAQ Website	Closing Phase Gate Complete		✓	●	Not Started	9/30/2022	9/30/2022
Acquisition FAQ Website	Deployment Phase Gate Complete		✓	●	Not Started	9/23/2022	9/23/2022
Acquisition FAQ Website	Planning Phase Gate Complete		✓	●	Not Started	7/12/2022	7/12/2022
Airport Access Security	Closing Phase Gate Complete			●	Not Started	4/11/2022	4/11/2022
Airport Access Security	Construction Phase Gate Complete			●	Not Started	6/3/2022	6/3/2022
Airport Access Security	Deployment Phase Gate Complete			●	Started	1/14/2022	1/14/2022
Alpha Product Phase 1	Closing Phase Gate Complete		✓	●	Started	12/29/2021	12/29/2021
Total							

Tasks



Staff

You are viewing 91 Investment(s)
Refreshed: 2/21/2023 2:50:37 PM

Hierarchy Name: All | Investment Type: All | Level - Investment: All | Goal: All | Unfilled Role?: All

Task Summary

- 237 Resources/Roles
- 2M ETC Hours
- 55 With Actuals
- 215 With ETC Hrs
- 2M ETC Hours

View resources/Roles by:

Primary Role	Vendor	Category	Employment Type
(Blank)			92
Developer			14
Test Engineer			13
Architect			11
Project Manager			10
Business Analyst			8
Network Engineer			6

Assigned Primary Roles -> Resources -> Tasks

Primary Role	Actuals	Pending Actuals	Base Hours	ETC Hours	Pending ETC Hours
Travel Expenses	0.00	0.00	0	0	0.00
Travel	0.00	0.00	0	0	0.00
Travel Expense	0.00	0.00	0	0	0.00
Requirements Definition	0.00	0.00	0	0	0.00
Identify Infrastructure Requirements	0.00	0.00	0	0	0.00
DSEO ADMIN	0.00	0.00	0	0	0.00
Another Task	0.00	0.00	0	0	0.00
Test Engineer	720.00	78.00	21,665	25,691	132.00
Walker, Terry	368.00	40.00	540	1,254	132.00
Total	12,852.07	2,882.24	746,989	2,094,306	469.00

Investment	Investment Manager	Overall	Schedule	Scope	Cost Effort	Resources /Roles	Allocations	Hard Allocations	Soft Allocations	Actuals	Pending Actuals	Base Hours	EAC Hours	Pending EAC Hours	ETC Hours	Pending ETC Hours	ACWP Cost
ZTest - MC Program	Administrator, Clarity					0	0	0	0								
Zero Harm Continually Improve Care	Administrator, Clarity					0	0	0	0								
Z - MC - Ongoing Expenses	Administrator, Clarity					0	0	0	0								
Yescarta (axi-cell)	Administrator, Clarity					4	2,816	0	2,816	0.00	0.00	0	2,712	0.00	2,712	0.00	\$0
Yack Integration project	Administrator, Clarity	✓				7	3,941	0	3,648	0.00	0.00	1,400	1,560	0.00	1,560	0.00	\$0
XPL Translations	Reed, Henry	✓				4	93,051	135,000	92,151	0.00	0.00	10,176	14,414	0.00	14,414	0.00	\$0
x Oracle DB	Administrator, Clarity					0	0	0	0								
Would Recommend Hospital	Administrator, Clarity					0	0	0	0								
Windows Enterprise Server	Miller, Veronica	⚠				0	0	0	0								
Web Based Training	Administrator, Clarity					0	0	0	0								
Web Based Training	Riviera, Alex		✓	Ⓜ	Ⓜ	16	118,466	0	118,466	240.00	0.00	81,120	114,178	0.00	113,938	0.00	\$33,600
Web Application Enhancement	Sutherland, Joy	✓	Ⓜ	Ⓜ	Ⓜ	8	54,498	157,924	53,445	7.00	32.00	1,320	1,320	32.00	1,313	0.00	\$1,050
Weather Monitoring Warning systems 2.6	Martin, Paul	✓				8	47,185	0	47,185	0.00	9.00	48,320	48,320	9.00	48,320	0.00	\$0
Weather Dopler	Martin, Paul	✓	Ⓜ	Ⓜ	✓	8	26,061	0	23,900	60.00	40.00	354,309	354,359	40.00	354,299	0.00	\$0
Wearables	Parks, Michael		Ⓜ	Ⓜ		1	8	0	8	0.00	0.00	0	8	0.00	8	0.00	\$0
Voltage Regulators	Martin, Paul					0	0	0	0								
Voice Recognition Feature	Flynn, Sam					1	0	0	0	0.00	0.00	0	0	0.00	0	0.00	\$0
Visidium 2000	Tennyson, Peter	✓				0	0	0	0								
Vignette Portal	Lewis, Paul	✓				2	8,336	0	8,336	0.00	0.00	0	8,336	0.00	8,336	0.00	\$0
View Special Offers	Flynn, Sam					1	0	0	0	0.00	0.00	0	0	0.00	0	0.00	\$0
Verizon TSMA	Matthews, April					0	0	0	0								
Variance Reporting	Thompson, Peter					0	0	0	0								
Value Improvement	Administrator, Clarity					0	0	0	0								
Value Experience Project	Administrator, Clarity					0	0	0	0								
Value Engineering Template	Administrator, Clarity					1	8	0	8	0.00	0.00	0	8	0.00	8	0.00	\$0
Vacation Time	Administrator, Clarity	✓				24	20,045	1,320	20,036	56.00	164.00	0	11,860	164.00	11,804	0.00	\$9,200
User ID tracking App	Martin, Paul	✓				1	0	0	0	0.00	10.00	0	8	10.00	8	0.00	\$0
Total						237	4,042,947	10,694,893	3,902,322	12,852.07	2,882.24	746,989	2,107,159	3,351.24	2,094,306	469.00	\$1,993...

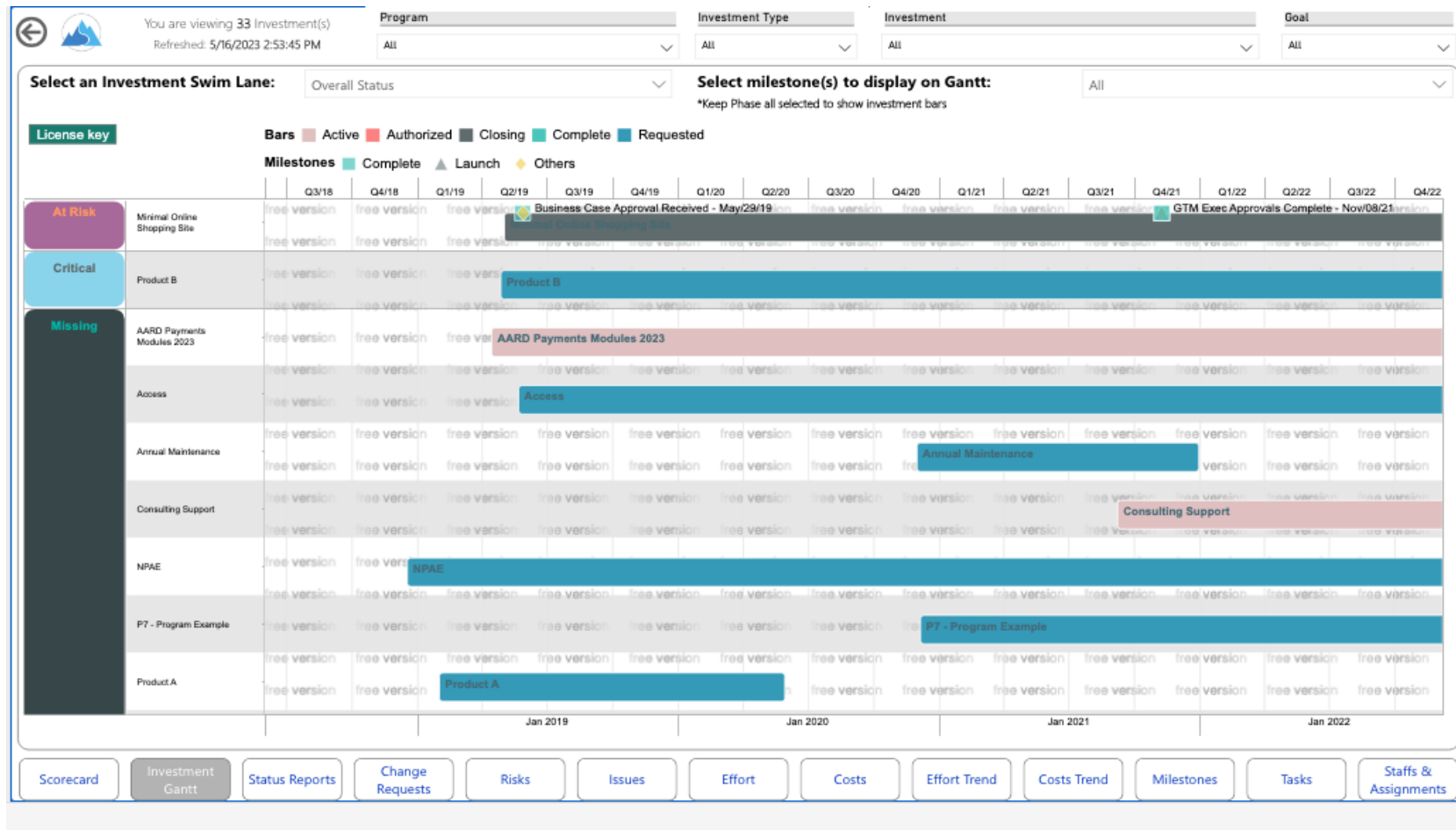
Program



Program Summary



Program Gant



Program Drill Thru

⏪ 🏠 Last refreshed: 5/16/2023 2:53:45 PM You are viewing Investment: **HR Online Benefits Security Upgrade**
Investment Manager is **Sutherland, Joy**

Overall Status On Track	Schedule Status Green	Scope Status Green	Cost & Effort Green	Actual Total Cost \$00	Capital Cost \$00	Operating Cost \$00
Start Date 08-Sep-21	Finish Date 30-Apr-23	Baseline Start 08-Sep-21	Baseline Finish 13-Jan-23	vs Budget	vs Budget	vs Budget

Build your own Task and Milestone Gantt! Select a swim lane:

Critical

◆ Milestone ⚡ Baseline

Report Date	Report Update	Key Accomplishments	Upcoming Activities
8/3/2019 12:00:00 AM +0000	Minor issues with the SMS One Time Password section of the software. This will NOT affect the delivery date of the project.		

Risk	Priority	Impact	Probability	Owner	Status	Due Date
SMS One Time Password	☆	1.00	1.00	Morris, Tom	OPEN	9/19/2019

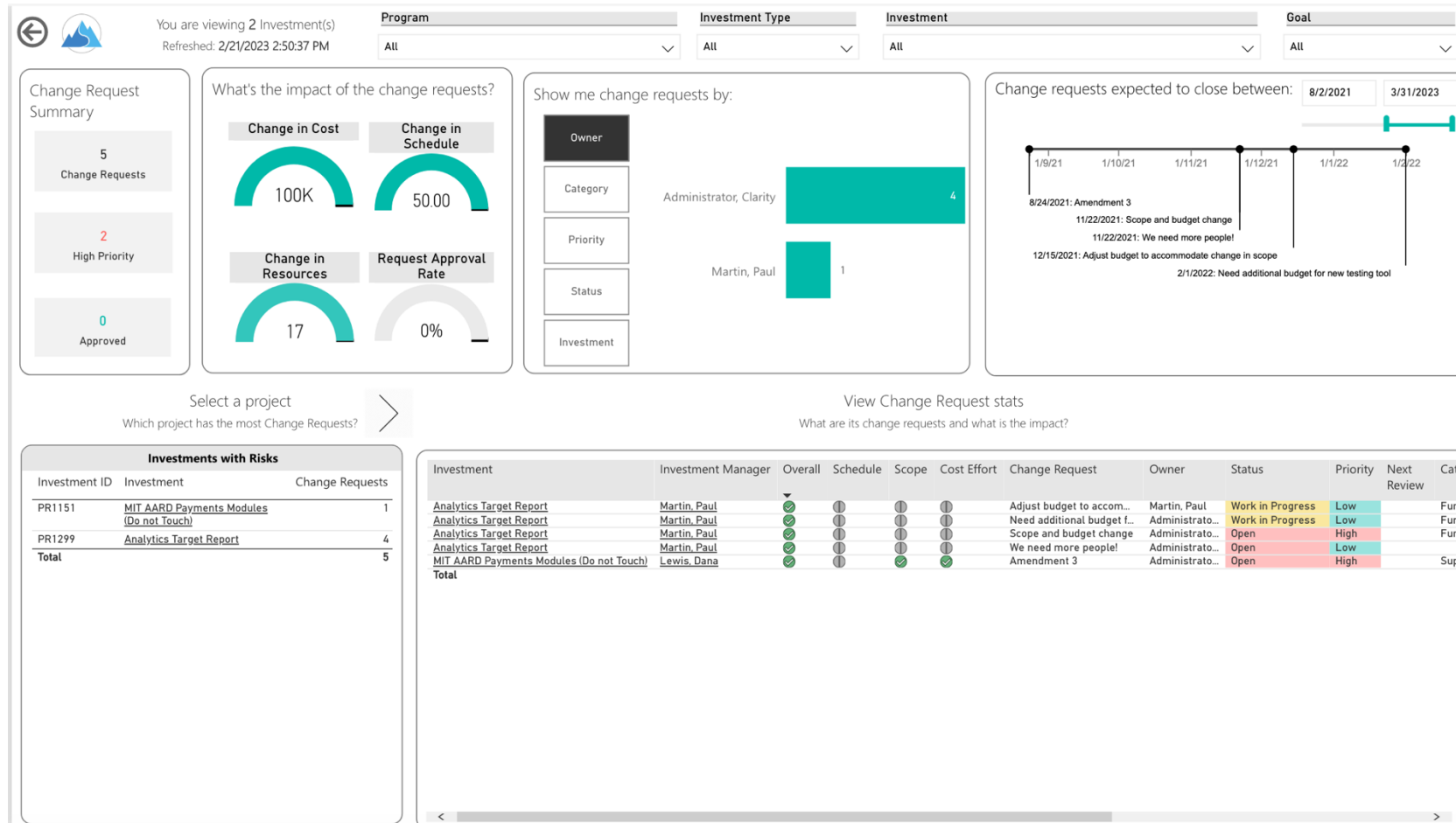
Issue	Priority	Owner	Status	Due Date	Resolution
401K benefits are managed offsite	☆	Morris, Tom	WORK IN PROGRESS	8/16/2019	
Pulling it all together	☆	Morris, Tom	WORK IN PROGRESS	8/13/2019	

Change Request	Priority	Owner	Expected Close Date	Reasons	Impact on Projects

Resource	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	S
Abbott, Karl	136.00	168.00	176.00	184.00	168.00	160.00	184.00	168.00	176.00	176.00	168.00	184.00	
Business Analyst	136.00	168.00	176.00	184.00	168.00	160.00	184.00	168.00	176.00	176.00	168.00	184.00	
Developer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Network Engineer	136.00	168.00	176.00	184.00	168.00	160.00	184.00	168.00	176.00	176.00	168.00	184.00	
Project Manager	136.00	168.00	176.00	184.00	168.00	160.00	184.00	168.00	176.00	176.00	168.00	184.00	
Total	816.00	1,008.00	1,056.00	1,104.00	1,008.00	960.00	1,104.00	1,008.00	1,056.00	1,056.00	1,008.00	1,104.00	1

Scorecard
Investment Gantt
Status Reports
Change Requests
Risks
Issues
Effort
Costs
Effort Trend
Costs Trend
Milestones
Tasks
Staffs & Assignments

Change Requests



Program Risks

You are viewing 33 Investment(s)
Refreshed: 5/16/2023 2:53:45 PM

Program: All Investment Type: All Investment: All Goal: All

Risk Summary

- 28 Open/WIP
- 52.00 Impact
- 7 High Priority
- 116.00 Calculated Risk
- 0 High Probability

How many risks are open or in progress?

Owner: [Dropdown]
Priority: [Dropdown]
Category: [Dropdown]
Status: [Dropdown]
Investment: [Dropdown]

What is the risk metric?

Select a project

Which project has the most risks?

Investment ID	Investment	Risks	Impact	Probability
PR1004	Web Application Enhancement	6	17.00	15.00
PR1002	eCommerce Portal	5	7.00	8.00
PR1299	Analytics Target Report	4	7.00	8.00
PG1000	Online Web Portal Program	3	6.00	5.00
PR1151	MIT AARD Payments Modules (Do not Touch)	3	5.00	7.00
PR1211	AARP Integration	2	4.00	5.00
PR1491	AARD Payments Modules 2023	2	2.00	2.00
PRS1012	Minimal Online Shopping Site	2	3.00	4.00
PR1021	HR Online Benefits Security Upgrade	1	1.00	1.00
Total		28	52.00	55.00

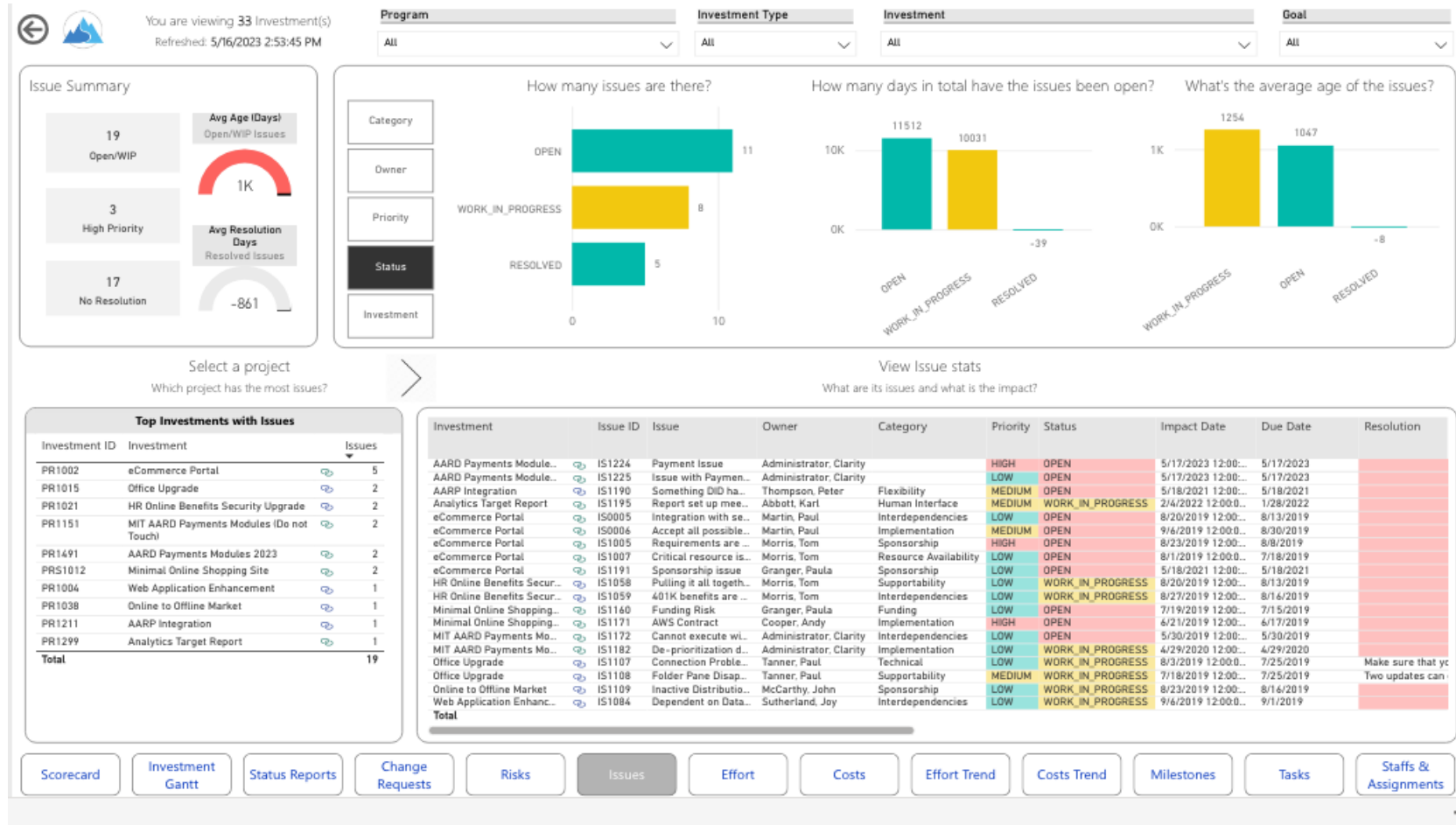
View Risk stats

What are its risks and what is the impact?

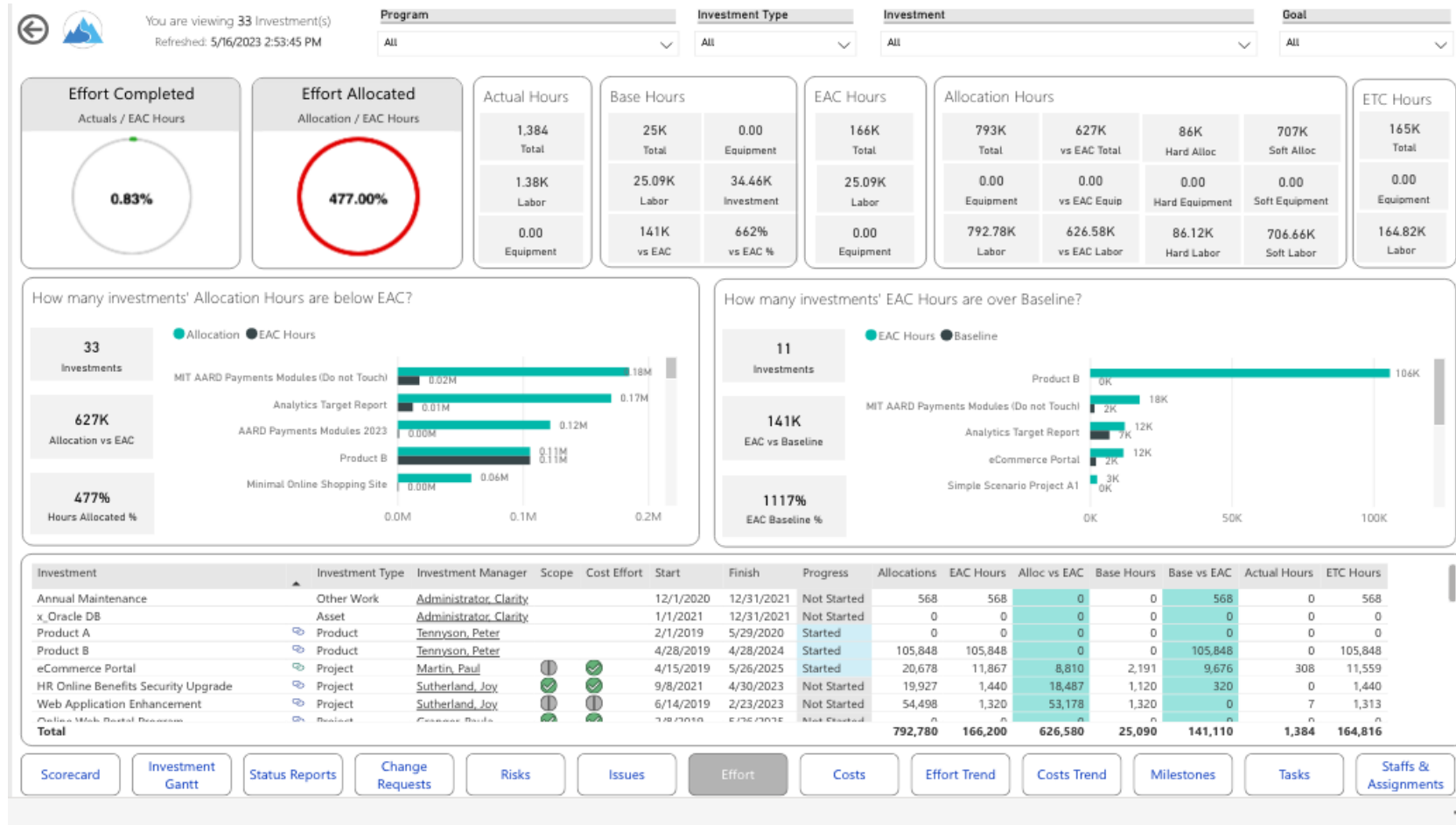
Investment	Risk ID	Risk	Owner	Due Date	Probability	Impact	Priority	Status
AARD Payments Modules 2...	RS1244	Timing	Administrator, Clarity	3/6/2023	1.00	1.00	LOW	OPEN
AARD Payments Modules 2...	RS1261	Money	Administrator, Clarity	5/17/2023	1.00	1.00	LOW	OPEN
AARP Integration	RS1140	Something may happen	Martin, Paul	6/11/2020	3.00	3.00	LOW	OPEN
AARP Integration	RS1209	It happened	Administrator, Clarity	4/18/2022	2.00	1.00	LOW	OPEN
Analytics Target Report	RS1165	We may have things come late	Martin, Paul	3/3/2021	1.00	1.00	MEDIUM	OPEN
Analytics Target Report	RS1166	Second Risk	Martin, Paul	3/3/2021	1.00	1.00	LOW	OPEN
Analytics Target Report	RS1170	Materials may come in late	Administrator, Clarity	5/17/2021	3.00	2.00	HIGH	OPEN
Analytics Target Report	RS1193	resource shortage	Administrator, Clarity	12/15/2021	3.00	3.00	HIGH	OPEN
eCommerce Portal	RS1014	Sponsorship Risk	Granger, Paula	7/17/2019	2.00	2.00	MEDIUM	OPEN
eCommerce Portal	RS1095	No budget	Martin, Paul	6/22/2019	1.00	1.00	LOW	OPEN
eCommerce Portal	RS1096	Scope Change	Martin, Paul	6/11/2019	3.00	2.00	MEDIUM	OPEN
eCommerce Portal	RS1270	Could be late	Administrator, Clarity	6/7/2023	1.00	1.00	LOW	OPEN
eCommerce Portal	RS1271	Risk	Agile, Andre	6/7/2023	1.00	1.00	HIGH	OPEN
HR Online Benefits Security...	RS1042	SMS One Time Password	Morris, Tom	9/19/2019	1.00	1.00	LOW	OPEN
Minimal Online Shopping S...	RS1094	Funding Risk	Granger, Paula	10/17/2019	1.00	1.00	LOW	OPEN
Minimal Online Shopping S...	RS1114	AWS Contract	Cooper, Andy	6/11/2019	3.00	2.00	HIGH	OPEN
MIT AARD Payments Modul...	RS1115	Team may not be able to continue ...	Amos, Cheryl	5/29/2019	3.00	3.00	MEDIUM	OPEN
MIT AARD Payments Modul...	RS1116	Reduced Funding could impact de...	Abbott, Karl	5/29/2019	1.00	1.00	LOW	OPEN
MIT AARD Payments Modul...	RS1117	Dependency on other teams for D...	Abbott, Karl	5/29/2019	3.00	1.00	LOW	OPEN
Online Web Portal Program	RS1073	Insufficient capacity may impede p...	Granger, Paula	6/18/2019	2.00	2.00	HIGH	OPEN
Online Web Portal Program	RS1074	Network and bandwidth issues ma...	Martin, Paul	6/25/2019	1.00	3.00	LOW	OPEN
Total					55.00	52.00		

Scorecard | Investment Gantt | Status Reports | Change Requests | **Risks** | Issues | Effort | Costs | Effort Trend | Costs Trend | Milestones | Tasks | Staffs & Assignments

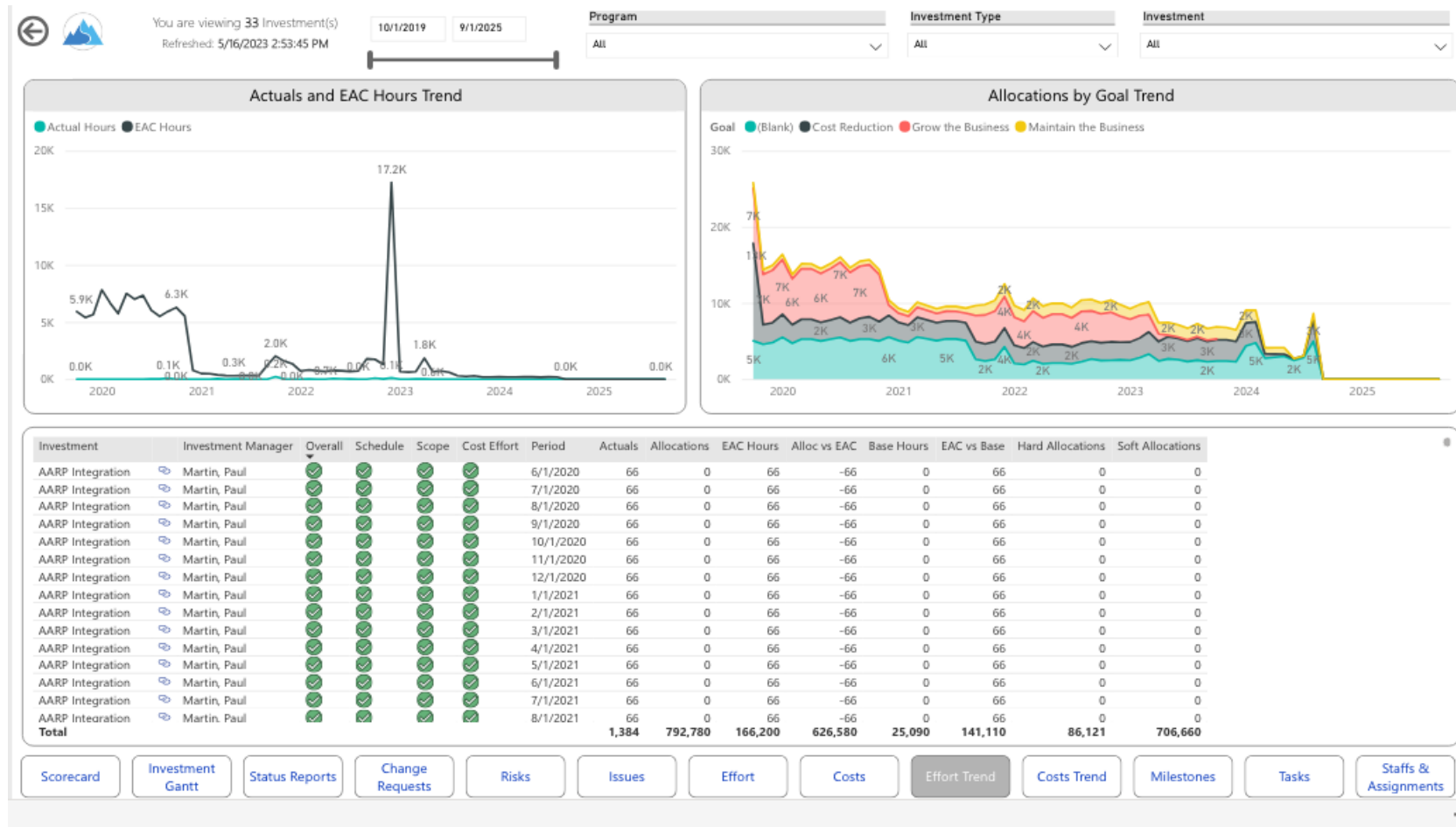
Program Issues



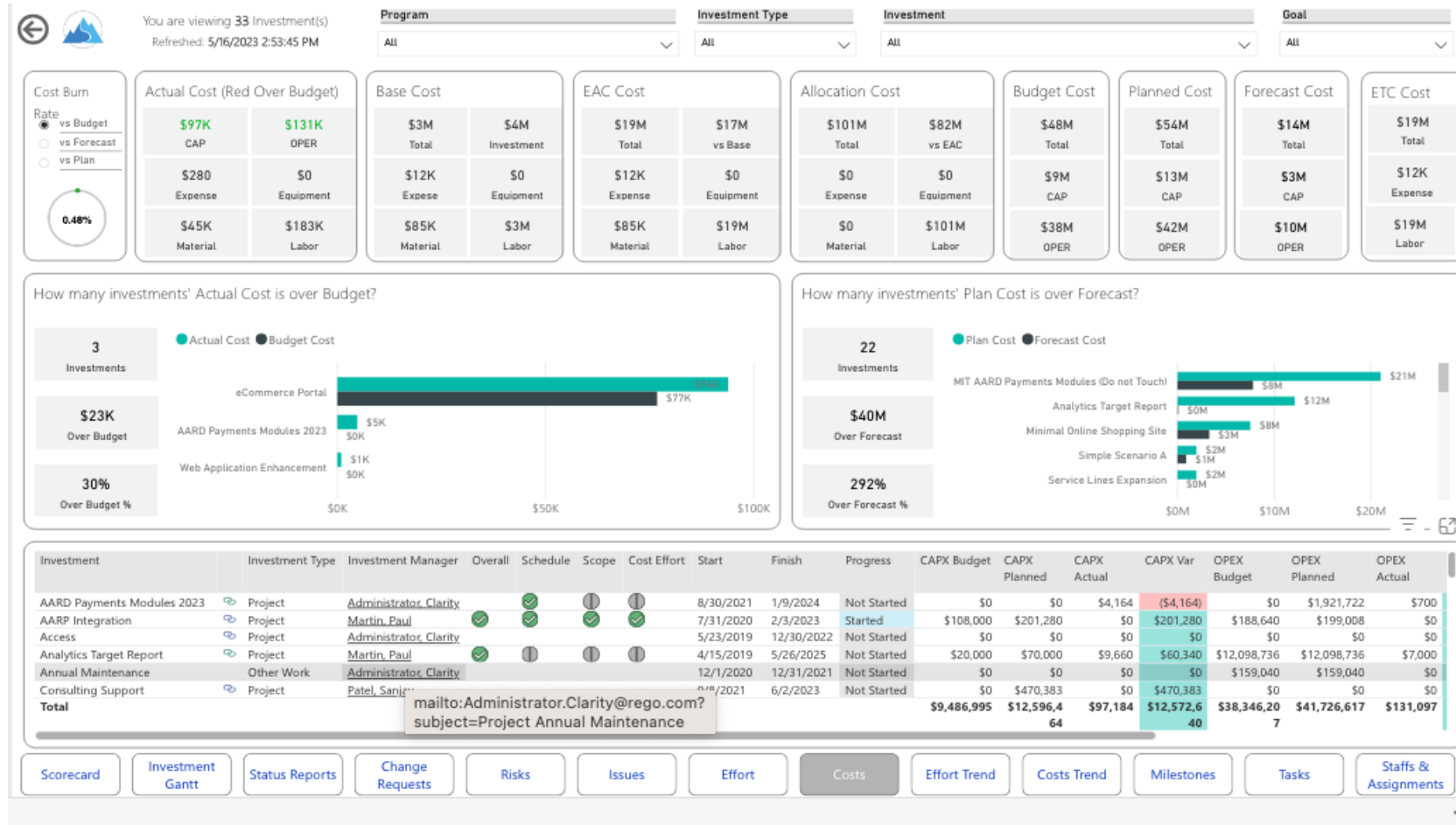
Program Effort



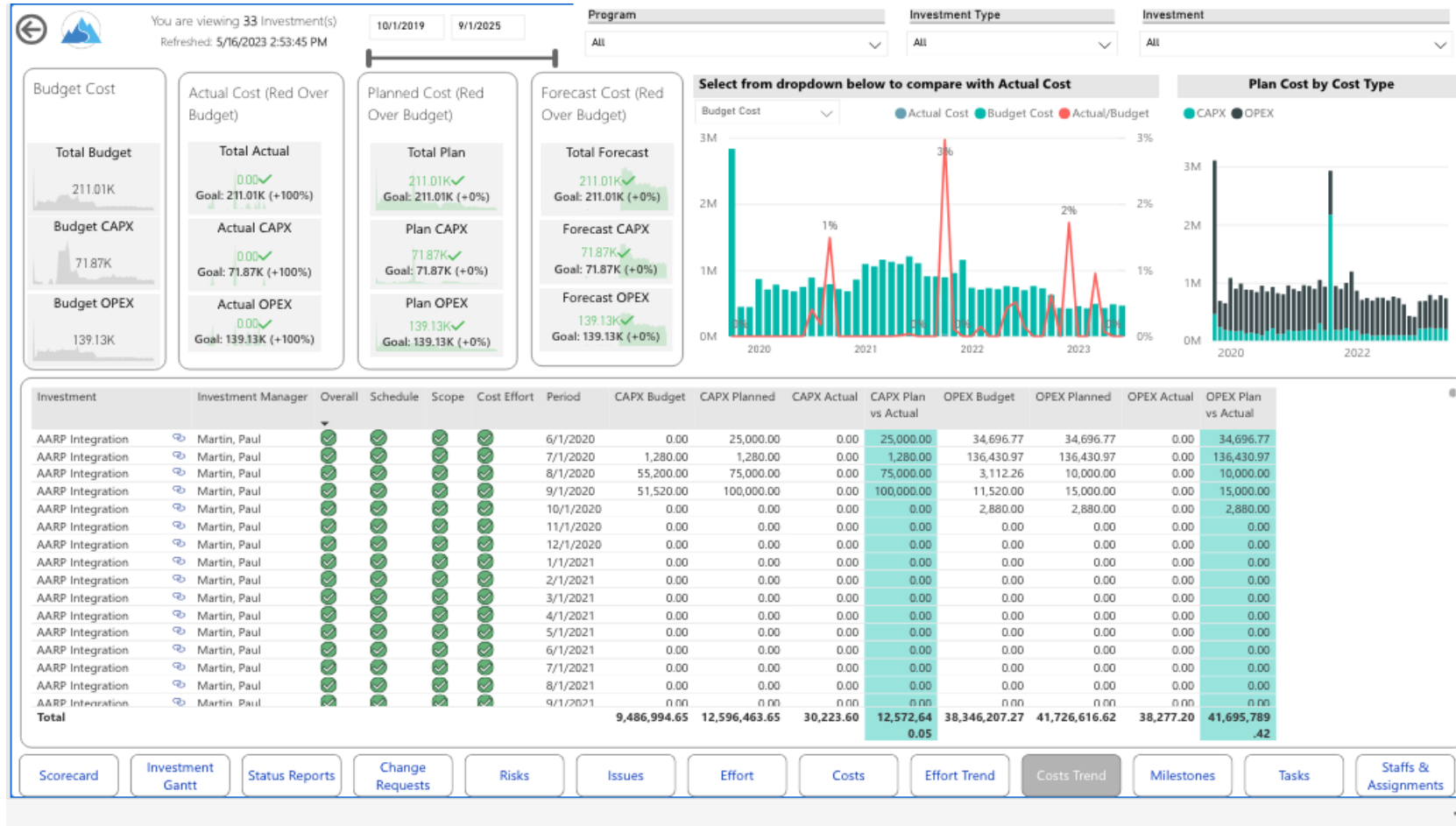
Program Effort Trend



Program Costs



Program Costs Trend



Program Staff

You are viewing 33 Investment(s)
Refreshed: 5/16/2023 2:53:45 PM

Program: All Investment Type: All Investment: All Goal: All Unfilled Role?: All

Task Summary

- 96 Resources/Roles
- 155K ETC Hours
- 25 With Actuals
- 77 With ETC Hrs
- 25K Base Hours

View resources/Roles by:

Primary Role	Vendor	Category	Employment Type
(Blank)			24
Developer			8
Architect			7
Project Manager			5
Test Engineer			5
Business Analyst			4
Manufacturing			4

Assigned Primary Roles -> Resources -> Tasks

Primary Role	Actuals	Pending Actuals	Base Hours	ETC Hours	Pending ETC Hours
Development - Engineers	225.00	573.00	3,235	46,244	30.00
Product B	0.00	0.00	0	3,320	0.00
Not Started and Late	0.00	0.00	0	3,320	0.00
Finance - Development Support	0.00	0.00	0	3,320	0.00
Product B	0.00	0.00	0	3,320	0.00
Not Started and Late	0.00	0.00	0	3,320	0.00
Marketing	0.00	0.00	0	3,320	0.00
Product B	0.00	0.00	0	3,320	0.00
Not Started and Late	0.00	0.00	0	3,320	0.00
Total	1,384.00	2,208.00	25,090	154,678	87.00

Investment	Investment Manager	Overall	Schedule	Scope	Cost Effort	Resources /Roles	Allocations	Hard Allocations	Soft Allocations	Actuals	Pending Actuals	Base Hours	EAC Hours	Pending EAC Hours	ETC Hours	Pending ETC Hours	ACWP Cost	Bi Cr
AARD Payments Modules 2023	Administrator, Clarity	🟢	🟢	🟡	🟡	12	121,872	0	121,872	20.00	676.00	872	1,272	676.00	1,252	0.00	980.00	
AARP Integration	Martin, Paul	🟢	🟢	🟡	🟡	1	0	0	0	66.00	82.00	0	66	82.00	0	0.00	9,240.00	
Access	Administrator, Clarity	🟢	🟢	🟡	🟡	11	170,612	0	141,178	119.00	280.00	6,939	12,320	280.00	12,201	0.00	1,000.00	
Analytics Target Report	Martin, Paul	🟢	🟢	🟡	🟡	1	568	0	568	0.00	0.00	0	568	0.00	568	0.00	0.00	
Annual Maintenance	Administrator, Clarity	🟢	🟢	🟡	🟡	14	20,678	4,210,098	-13,102	308.00	220.00	2,191	1,730	274.00	1,422	54.00	94,000.00	\$4
Consulting Support	Martin, Paul	🟢	🟢	🟡	🟡	6	19,927	0	19,927	0.00	0.00	1,120	1,440	0.00	1,440	0.00	0.00	\$1
eCommerce Portal	Sutherland, Joy	🟡	🟢	🟡	🟡	5	58,974	0	58,974	254.00	0.00	254	310	0.00	56	0.00	40,400.00	\$1
HR Online Benefits Security Upgrade	Lewis, Dana	🟢	🟢	🟡	🟡	18	184,723	1,674,270	163,101	570.00	884.00	1,654	17,586	917.00	17,016	33.00	72,780.00	\$2
Minimal Online Shopping Site	Cooper, Andy	🟢	🟢	🟡	🟡		4,128	32,480	3,896									
MIT AARD Payments Modules (Do not Touch)	Administrator, Clarity	🟢	🟢	🟡	🟡	5	22,950	0	22,950	0.00	0.00	3,824	3,824	0.00	3,824	0.00	0.00	\$1
Modernize Customer Service Portal	Tanner, Paul	🟢	🟢	🟡	🟡	6	19,440	0	19,440	0.00	0.00	848	1,152	0.00	1,152	0.00	0.00	\$1
NPAE	McCarthy, John	🟢	🟢	🟡	🟡		0	0	0									
Office Upgrade	Granger, Paula	🟢	🟢	🟡	🟡		0	0	0									
Online to Offline Market	Administrator, Clarity	🟢	🟢	🟡	🟡		0	0	0									
Online Web Portal Program	Tennyson, Peter	🔴	🟢	🟡	🟡	33	105,848	0	105,848	0.00	0.00	0	105,848	0.00	105,848	0.00	0.00	
P7 - Program Example	Administrator, Clarity	🟢	🟢	🟡	🟡		0	0	0									
Product A	Tennyson, Peter	🔴	🟢	🟡	🟡		0	0	0									
Product B	Tennyson, Peter	🔴	🟢	🟡	🟡		0	0	0									
Product Family - Online Orders	Administrator, Clarity	🟢	🟢	🟡	🟡		0	0	0									
Product Group - Online Orders	Administrator, Clarity	🟢	🟢	🟡	🟡		0	0	0									
Revamp online presence	Thompson, Peter	🟢	🟢	🟡	🟡		0	0	0									
SDC Enterprise Program	Administrator, Clarity	🟢	🟢	🟡	🟡		0	0	0									
SDC Governance Program	Administrator, Clarity	🟢	🟢	🟡	🟡		0	0	0									
Total						96	792,780	6,074,774	706,660	1,384.00	2,208.00	25,090	154,062	2,295.00	154,678	87.00	219,45...	\$2

Scorecard | Investment Gantt | Status Reports | Change Requests | Risks | Issues | Effort | Costs | Effort Trend | Costs Trend | Milestones | Tasks | Staffs & Assignments

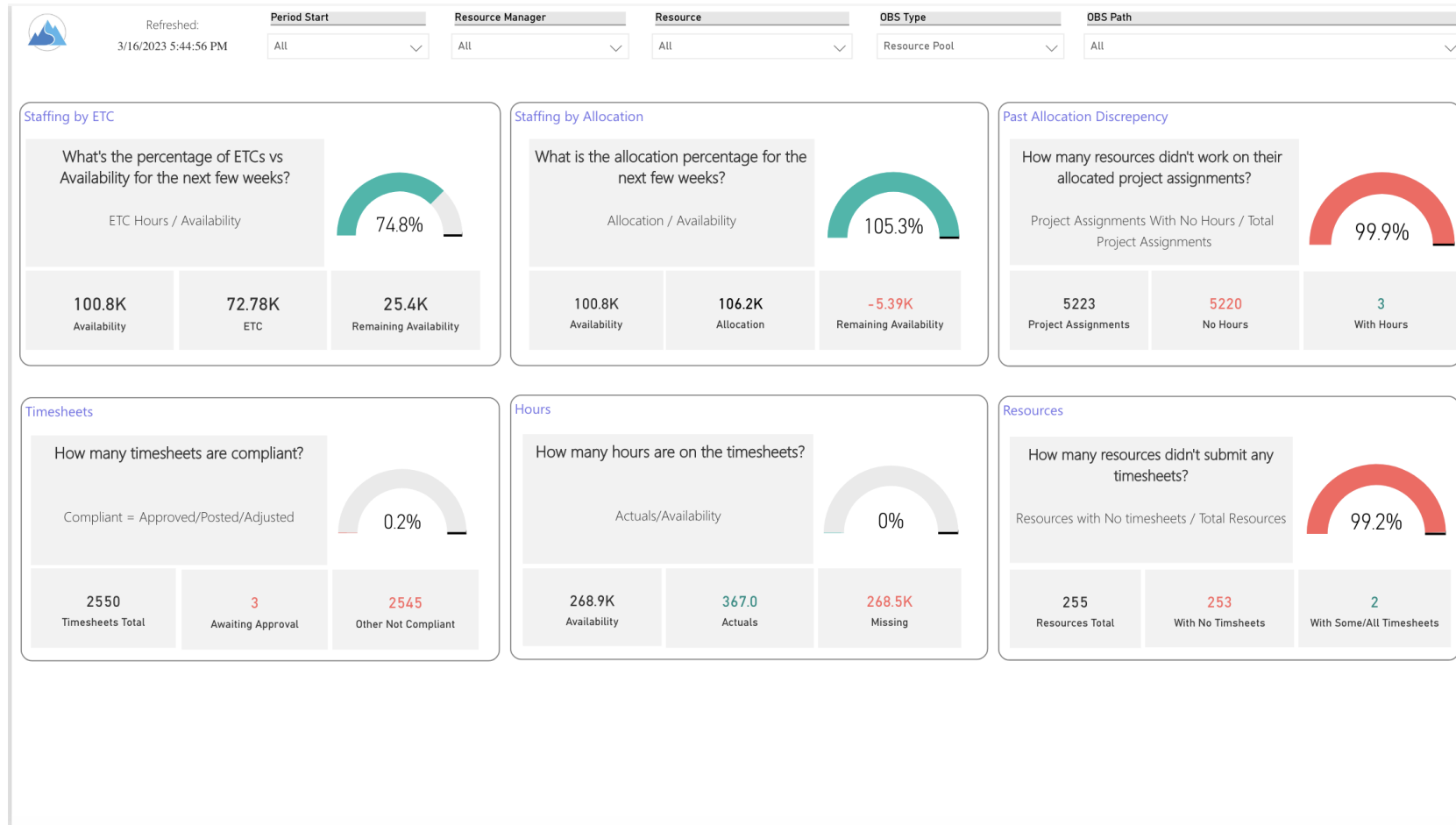
Resource



regoUniversity

KANSAS CITY • 2024

Resource Summary



Staffing ETC

You are viewing 319 resources/roles from 13 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start: All | Resource Manager: All | Resource: All | OBS Type: Resource Pool | OBS Path: All | Unfilled Role?: All

What's the ETCs for the upcoming weeks?

Hours by Time Period

Time Period	ETC Hours
4/24/23	17K
5/1/23	17K
5/8/23	17K
5/15/23	12K
5/22/23	12K
5/29/23	12K

View ETCs by:

Investment Type	ETC Hours
10	65K
2	5K
3	3K
1	2K
29	2K
30	1K
13	1K
(Blank)	1K
22	0K
15	0K
7	0K

Investments with top ETC Hours:

Investment	ETC Hours
Level 1 Training	35,454
Billing AutoPay	8,735
Radiation Oncology Varian Upgr...	3,538
Relocation of Neuropsychology ...	3,431
Weather Monitoring Warning sys...	3,000
CL - Digitizing Paper Records w...	2,617
Decrease Average Contract Disc...	2,112
New Pricing System	2,048
CL - Old PPM Data Migration P...	1,920
CL - Old PPM Data Migration P...	1,920
CL - Old PPM Data Migration P...	1,920
Project Edison	1,680
Riverside: Patient records project	1,248
iOS Prototype Project - New Sup...	1,200

Resource Manager ETCs

What are the ETC hours by Resource Manager?

Resource Manager	4/24/23	5/1/23	5/8/23	5/15/23	5/22/23	5/29/23	Total
Administrator, Clarity	101.6%	96.6%	93.6%	92.4%	94.3%	90.3%	94.8%
Hensel, Ross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Joseph, Derrick	22.8%	22.8%	22.8%	22.8%	22.8%	36.8%	25.1%
Kumar, Arun	62.3%	97.7%	87.2%	81.7%	63.2%	57.7%	75.0%
Lewis, Dana	4.6%	4.6%	4.6%	4.6%	4.6%	4.6%	4.6%
Malone, Rosie	218.6%	154.8%	155.8%	154.8%	154.8%	154.8%	165.6%
Miller, Robert	28.6%	28.6%	28.6%	28.6%	28.6%	28.6%	28.6%
Miller, Rosie	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%
Montoya, Mark	24.1%	25.8%	25.2%	25.2%	25.2%	24.6%	25.0%
Montoya, Mark	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	89.7%	73.0%	72.4%	71.7%	71.4%	70.8%	74.8%

View resource details

What are the resources' allocations and remaining availabilities?

Select a Resource/Role to view ETCs by investment

Primary Role	4/24/23			5/1/23			5/8/23			Availability
	Availability	ETC Hours	Remaining Avail	Availability	ETC Hours	Remaining Avail	Availability	ETC Hours	Remaining Avail	
Total	4,037.0	12,696.8	-7941.0	4,037.0	9,624.2	-4894.0	4,037.0	9,546.2	-4816.0	4,037.0
Architect	280.0	426.3	-146.3	280.0	610.3	-330.3	280.0	546.3	-266.3	280.0
Business Analyst	80.0	8.0	72.0	80.0	8.0	72.0	80.0	17.6	62.4	80.0
Phillips, Peter	40.0	4.0	36.0	40.0	4.0	36.0	40.0	13.6	26.4	40.0
Robinson, Brian	40.0	4.0	36.0	40.0	4.0	36.0	40.0	4.0	36.0	40.0
Business Architect	40.0	6.0	34.0	40.0	6.0	34.0	40.0	6.0	34.0	40.0
Champion	40.0	20.0	20.0	40.0	20.0	20.0	40.0	20.0	20.0	40.0
Coach	40.0	6.0	34.0	40.0	6.0	34.0	40.0	6.0	34.0	40.0
Total	5,802.0	15,794.7	-9273.9	5,802.0	12,955.3	-6460.1	5,802.0	12,867.7	-6372.5	5,802.0

Staffing Allocations

You are viewing 319 resources/roles from 13 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start: All | Resource Manager: All | Resource: All | OBS Type: Resource Pool | OBS Path: All | Unfilled Role?: All

What's the allocations for the upcoming weeks?

Hours by Time Period

● Availability ● Allocation

Week	Availability	Allocation
4/24/23	21K	17K
5/1/23	21K	17K
5/8/23	21K	17K
5/15/23	21K	17K
5/22/23	21K	17K
5/29/23	21K	17K

Where are the resources allocating hours to?

Investment Type	Inv Goal	Inv Cost Type	Inv Priority	Inv Department	Inv Charge Code	Inv Overall Status
(Blank)						45K
GROW_BUSINESS						28K
REDUCE_COST						14K
AVOID_COST						12K
IMPROVE_INFRASTRUCTURE						4K
MAINTAIN_BUSINESS						3K

Top Allocated Investments:

Investment	Allocation
Level 1 Training	17670
eCommerce Portal	4286
CRM Contact Center Development	3972
Radiation Oncology Varian Upgr...	3972
CL - Digitizing Paper Records w...	3840
CL - Old PPM Data Migration P...	3677
Decrease Average Contract Disc...	3372
Analytics Target Report	3120
Weather Monitoring Warning sy...	2985
System for XYZ Client	2880
MIT AARD Payments Modules ...	2820
Project Edison	2640
XPL Translations	2424
Airport Access Security	2280

Select a manager

Who is not adequately allocated for the upcoming weeks?

View resource details

What are the resources' allocations and remaining availabilities?

Select a Resource to view allocation by investment

Allocation %: (Availability - Allocation) / Availability

Resource Manager	4/24/23	5/1/23	5/8/23	5/15/23	5/22/23	5/29/23	Total
Administrator, Clarity	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Reting, Lynn	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Toland, Ryan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Montoya, Mark	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%
Tennyson, Peter	15.5%	15.5%	15.5%	15.5%	15.5%	15.5%	15.5%
Miller, Robert	22.9%	22.9%	22.9%	22.9%	22.9%	23.6%	23.0%
Parks, Michael	29.3%	29.3%	29.3%	29.3%	28.7%	26.4%	28.7%
Malone, Rosie	46.7%	46.7%	46.7%	46.7%	46.7%	46.7%	46.7%
Joseph, Derrick	80.0%	80.0%	80.0%	80.0%	79.1%	75.4%	79.1%
Miller, Rosie	79.1%	81.2%	81.2%	81.2%	81.1%	80.3%	80.7%
Total	123.0%	104.1%	102.1%	101.5%	101.7%	99.7%	105.3%

Hours by Primary Role -> Resource

Period Start Primary Role	4/24/23			5/1/23			5/8/23			5/15/23		
	Availability	Allocation	Remaining	Availability	Allocation	Remaining	Availability	Allocation	Remaining	Availability	Allocation	Remaining
Total	8,997.0	15,807.76	-10,810.76	4,997.0	12,621.76	-7,624.76	4,997.0	12,285.76	-7,288.76	4,997.0	12,189.76	-7,192
Account Manager	80.0	92.00	-12.00	80.0	92.00	-12.00	80.0	92.00	-12.00	80.0	92.00	-12
Armstrong, Rachel	40.0	52.00	-12.00	40.0	52.00	-12.00	40.0	52.00	-12.00	40.0	52.00	-12
Phillips, Steven	40.0	40.00	0.00	40.0	40.00	0.00	40.0	40.00	0.00	40.0	40.00	0
Architect	440.0	820.10	-380.10	440.0	820.10	-380.10	440.0	820.10	-380.10	440.0	820.10	-380
Architect PS	120.0	80.00	40.00	120.0	80.00	40.00	120.0	80.00	40.00	120.0	80.00	40
Business Analyst	220.0	240.00	-20.00	220.0	240.00	-20.00	220.0	240.00	-20.00	220.0	240.00	-20
Business Architect	40.0	46.00	-6.00	40.0	46.00	-6.00	40.0	46.00	-6.00	40.0	46.00	-6

Allocation Discrepancies

You are viewing 255 resources from 13 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start: All | Resource Manager: All | Resource: All | OBS Type: Resource Pool | OBS Path: All | Investment Goal: All

Which group has most allocation discrepancies?

-142.25K

Act vs Alloc

142.59K

Allocation

339.00

Actuals

Allocation Discrepancy by Investment Cost Type

Allocation Discrepancy by Resource Manager

What Investments/resources have most allocation discrepancies?

Investment | Resource

Allocation Discrepancy

Select a row to enable detail buttons to view where resources logged their hours to instead:

Select a Manager to view detail | Select a Resource to view detail

Investment ID	Investment	Investment Manager	Resource Manager	Resource	OBS Path	Period Start	Timesheet Status	Act vs Alloc	Actuals	Allocation	Soft Allocation	Hard Allocation
PR1402	iSeries Location Tracking	McCoubrie, Wes	Miller, Rosie	McCoubrie, Wes	All Groups Internal Shared Services	3/6/23	Posted	280.00	320.00	40.00	40.00	0.00
PR1046	Technical Architecture	Malone, Paula	Miller, Rosie	Moreau, Erin	All Groups Internal Operations	1/23/23	Posted	-30.00	10.00	40.00	40.00	0.00
PR1422	Weather Monitoring Warning systems 2.6	Martin, Paul	Lewis, Dana	AB Team	All Groups A Teams	1/23/23	Open	-2,896.00	9.00	2,905.00	2,905.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	1/23/23		-24.00	0.00	24.00	24.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	1/30/23		-36.00	0.00	36.00	36.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	2/6/23		-16.00	0.00	16.00	16.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	2/13/23		-16.00	0.00	16.00	16.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	2/20/23		-38.00	0.00	38.00	38.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	2/27/23		-30.00	0.00	30.00	30.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	3/6/23		-30.00	0.00	30.00	30.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	3/13/23		-38.00	0.00	38.00	38.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	3/20/23		-70.00	0.00	70.00	70.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Hayes, Justin	All Groups Internal Shared Services	3/27/23		-22.00	0.00	22.00	22.00	0.00
PR1491	AARD Payments Modules 2023	Administrator, Clarity	Miller, Rosie	Morris, Tom	All Groups Internal Shared Services	2/20/23	Submitted	-6.00	0.00	6.00	6.00	0.00
Total								-142,250.19	339.00	142,589.19	139,034.79	3,554.40

Resource Detail

You are viewing 255 resources from 13 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start: All | Resource Manager: All | Resource: All | OBS Type: Resource Pool | OBS Path: All

Resource Counts

255
Resources Total

253 With no timesheets	99.2% Not Compliant %
2 With some timesheets	0.8% Partially Compliant %
0 With all timesheets	0.0% Fully Compliant %

Resources with some or no timesheets by: Resource Manager | OBS Path

Resources with missing timesheet Trend

● Administrator, Clarity ● Hensel, Ross ● Joseph, Derrick ● Kumar, Arun ● Lewis, Dana ● Malone, Rosie

Resources

Top Available Resources	Top Utilized Resources
Abbott, Karl 100%	McCoubrie, Wes 80%
Adams, Benjamin 100%	Moreau, Erin 10%
Agency Team 100%	AB Team 0%
Agile, Andre 100%	Abbott, Karl 0%
Allen, Timothy 100%	Adams, Benjamin 0%
Alvarez, Corine 100%	Agency Team 0%
America, Captain 100%	Agile, Andre 0%
Amos, Cheryl 100%	Allen, Timothy 0%
Analog Team 100%	Alvarez, Corine 0%
Anderson, Christ... 100%	America, Captain 0%
Andrews, Jason 100%	Amos, Cheryl 0%
Angelo, Michael 100%	Analog Team 0%
Anthracle Team 100%	Anderson, Chris... 0%

Select a OBS/Manager
Who has low Compliance?

Timesheet Compliance

Resource Manager	Compliance %
Administrator, Clarity	0.0%
Hensel, Ross	0.0%
Joseph, Derrick	0.0%
Kumar, Arun	0.0%
Lewis, Dana	0.0%
Malone, Rosie	0.0%
Miller, Robert	0.0%
Montoya, Mark	0.0%
Parks, Michael	0.0%
Reiling, Lynn	0.0%
Total	0.2%

Select a Resource (or multiple with CTRL key)
Which resource caused it?

Timesheet Compliance by Resource Manager -> Resource

Resource Manager	1/23/23	1/30/23	2/6/23	2/13/23	2/20/23	2/27/23	3/6/23	3/13/23	3/20/23	3/27/23	Total
Miller, Rosie	1.4%	0.0%	0.0%	0.0%	1.4%	0.0%	2.8%	1.4%	0.0%	0.0%	0.7%
Administrator, Clarity	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hensel, Ross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Joseph, Derrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kumar, Arun	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lewis, Dana	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malone, Rosie	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Miller, Robert	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Montova, Mark	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.4%	0.0%	0.0%	0.0%	0.4%	0.0%	0.8%	0.4%	0.0%	0.0%	0.2%

View this resource's stats
How has he/she performed over time? What are his/her hours?

Hours by Week and Resource Manager

Resource Manager	1/23/23	1/30/23	2/6/23	2/13/23	2/20/23	2/27/23	3/6/23	3/13/23	3/20/23
Administrator, Clarity	1	1	1	1	1	1	1	1	1
Resources	40.0	40.0	40.0	40.0	40.0	40.0	40.0	40.0	40.0
Availability	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Entered	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Compliance %	40.0	40.0	40.0	40.0	40.0	40.0	40.0	40.0	40.0
Missing	0%	0%	0%	0%	0%	0%	0%	0%	0%
Utilization %	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Allocation	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Allocation %	-40.0	-40.0	-40.0	-40.0	-40.0	-40.0	-40.0	-40.0	-40.0
Act vs Avail	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Act vs Alloc	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Resource Skills

You are viewing 253 resources from 13 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start: All | Resource Manager: All | Resource: All | OBS Type: Resource Pool | OBS Path: All

How many resources are there for each skillset?

Resources by skills

● Beginner ● Advanced ● Expert

Skill	Beginner	Advanced	Expert
Earned Value Analysis	10	5	5
Financial Expertise	10	5	5
Project Planning	10	5	5
Scope Management	10	5	5
HTML	10	5	5
Architectural Analytics	10	5	5
Data Modeling	10	5	5
Project Scheduling	10	5	5
J2EE	10	5	5
Project Management	10	5	5
Resource Management	10	5	5

View skillsets by:

Primary Role | Resource Class | Resource Manager | Trans Class | Vendor | Department

Skill matrix

How many resources are there for each skill and proficiency level?

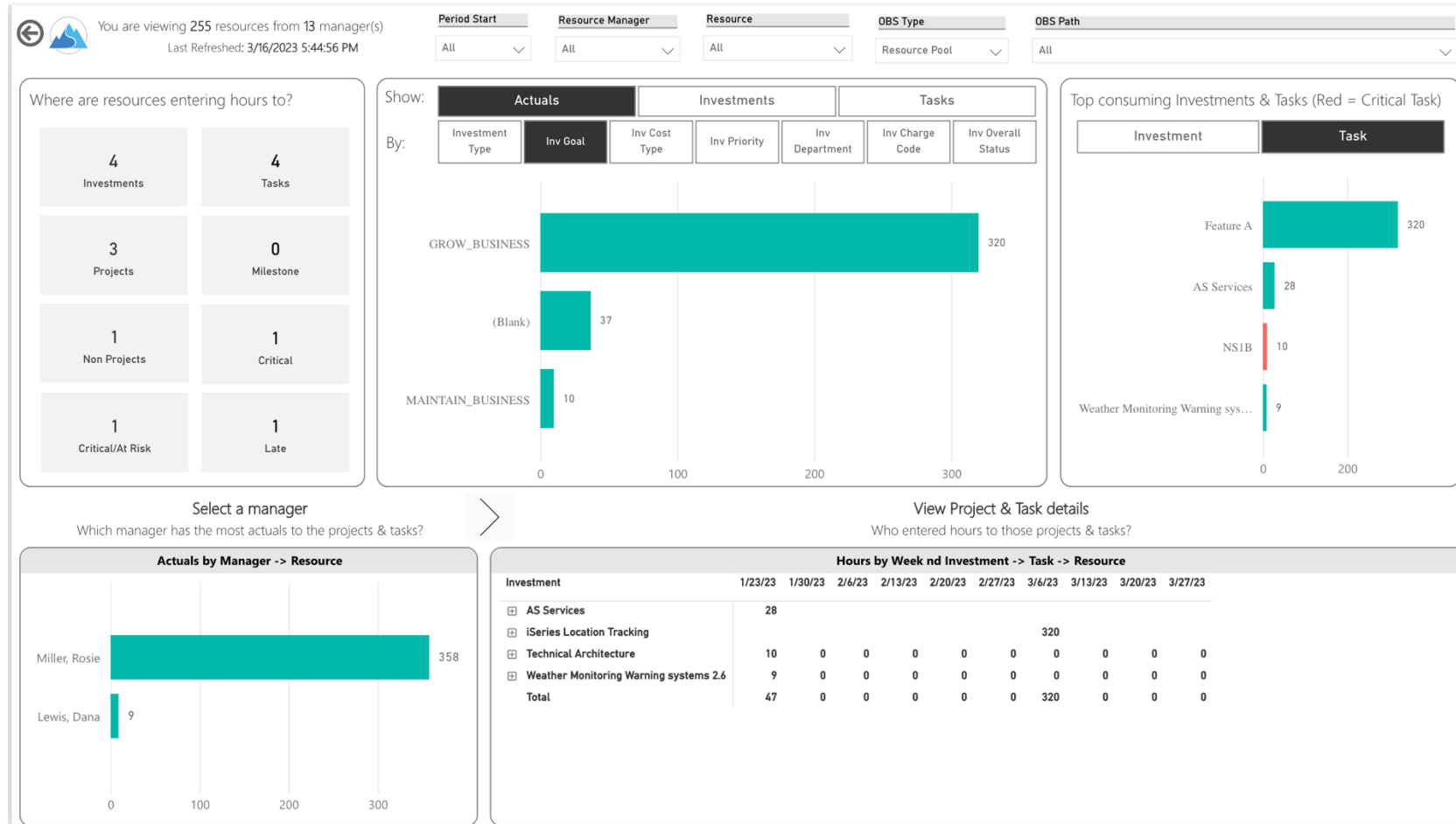
Skill	Resources by Skill and Proficiency Level			Total
	Beginner	Advanced	Expert	
XML	5	1		6
WebUI	4	2	2	8
Unix Server Maintenance	1			1
SQL Server	6		1	7
Scope Management	13	4		17
Sales Operations Expertise	8		1	9
Resource Management	5	3	1	9
Regulatory & Contracts	1			1
Project Scheduling	5	3	2	10
Project Planning	13	4	1	18
Total	37	19	18	253

View resource & investment details

Who are those resources and do they have remaining availabilities?

Resource	Resource -> Investment											
	1/23/23		1/30/23		2/6/23		2/13/23		2/20/23		2/27/23	
	Availability	Allocation	Availability	Allocation	Availability	Allocation	Availability	Allocation	Availability	Allocation	Availability	Allocation
AB Team	2,905.0	2,905.00	2,905.0	5,810.00	2,905.0	5,810.00	2,905.0	5,810.00	2,905.0	5,810.00	2,905.0	5,810.00
Abbott, Karl	25.0	11.25	25.0	26.20	25.0	36.17	25.0	11.25	25.0	11.25	25.0	11.25
Adams, Benjamin	40.0	44.00	40.0	44.00	40.0	44.00	40.0	44.00	40.0	44.00	40.0	44.00
Agency Team	700.0		700.0		700.0		700.0		700.0		700.0	
Agile, Andre	40.0	44.00	40.0	44.00	40.0	44.00	40.0	44.00	40.0	44.00	40.0	44.00
Allen, Timothy	40.0	8.00	40.0	8.00	40.0	20.00	40.0	20.00	40.0	20.00	40.0	20.00
Internal Meetings	40.0	2.00	40.0	2.00	40.0	2.00	40.0	2.00	40.0	2.00	40.0	2.00
Total	14,247.0	4,450.42	14,247.0	7,456.83	14,247.0	7,469.31	14,247.0	7,369.18	14,247.0	7,373.18	14,247.0	7,373.18

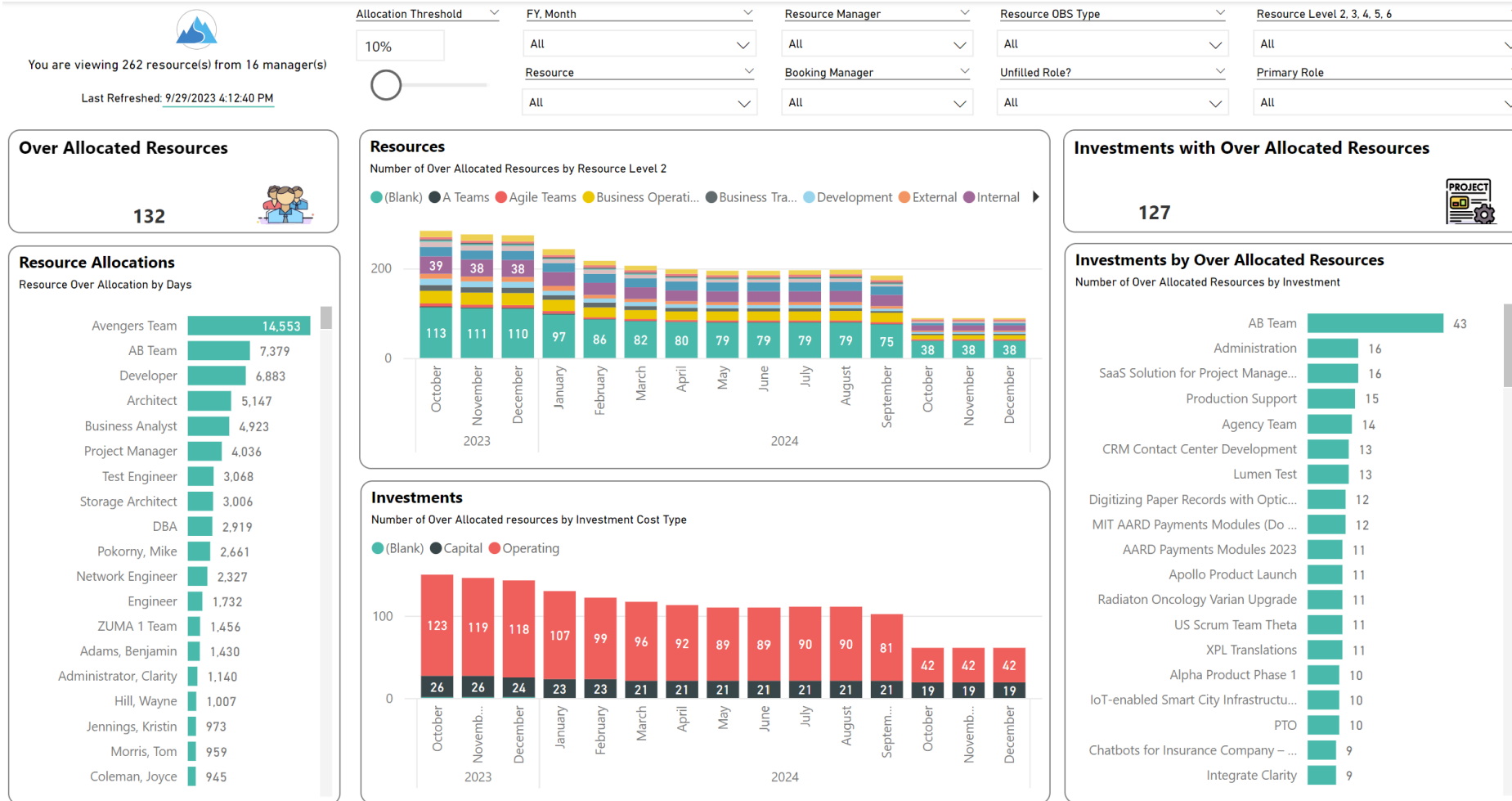
Resource Tasks



Resource Allocation Planning



Over Allocations



By People

You are viewing 262 resource(s) from 16 manager(s)

Last Refreshed: 9/29/2023 4:12:40 PM

Allocation Threshold: 10%

FY. Month: All

Resource Manager: All

Resource OBS Type: All

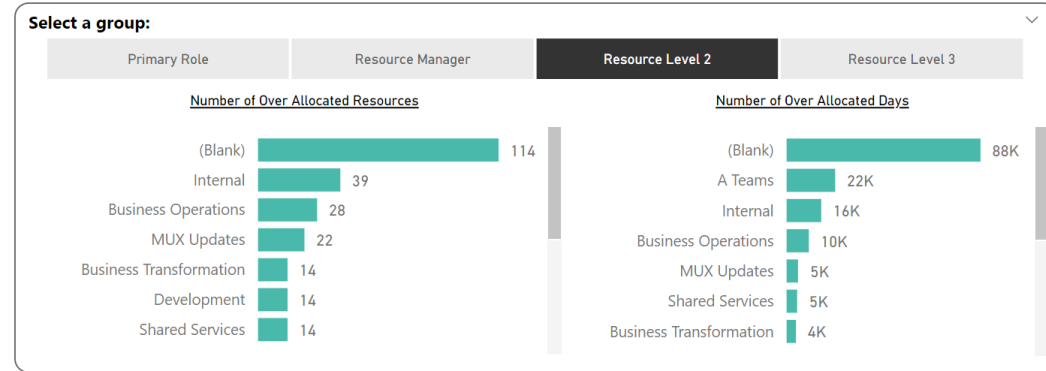
Resource Level 2, 3, 4, 5, 6: All

Resource: All

Booking Manager: All

Unfilled Role?: All

Primary Role: All



Which Resource OBS Group has the highest % of Over Allocated Resources?

Resource Level 2	%	Resources	Over Allocated
(Blank)	52.8%	216	114
A Teams	66.7%	3	2
Agile Teams	77.8%	9	7
Business Operations	68.3%	41	28
Business Transformation	36.8%	38	14
Development	73.7%	19	14
External	84.6%	13	11
Internal	55.7%	70	39
MUX Updates	57.9%	38	22
New Product Development	36.4%	33	12
Total	50.4%	262	132

Allocation by Resource Managers

Red highlight indicates months with over allocated resources


Resource Manager	Year Month Resource	2023		Remaining Availability	2023		Resources
		October	Allocation %		November	Allocation %	
Total		261	233.5%	-11,349.60	256	225.5%	253
Administrator, Clarity		44	382.6%	-4,496.16	42	361.2%	42
Hensel, Ross		8	270.7%	-285.46	8	238.5%	8
Joseph, Derrick		14	197.8%	-298.40	14	191.3%	14
Kumar, Arun		13	221.7%	-371.41	13	210.8%	13
Lewis, Dana		6	267.6%	-3,497.28	6	261.9%	6
Malone, Rosie		15	140.7%	-143.15	15	130.3%	12
McCoubrie, Wes		7	190.7%	-149.01	7	190.7%	7
Miller, Robert		28	134.4%	-225.91	28	127.2%	28

Allocation by Resources and Projects

Resource	Investment	Month	Allocation	Allocation %
AB Team	Apollo Product Launch	Oct 23	596.49	35%
AB Team	Apollo Product Launch	Nov 23	596.49	35%
AB Team	Apollo Product Launch	Dec 23	569.38	35%
AB Team	Automation & Robotics	Oct 23	1,704.27	100%
AB Team	Automation & Robotics	Nov 23	1,704.27	100%
AB Team	Automation & Robotics	Dec 23	1,626.80	100%
AB Team	Automation & Robotics	Jan 24	1,781.73	100%
AB Team	Automation & Robotics	Feb 24	1,626.80	100%
AB Team	Automation & Robotics	Mar 24	1,626.80	100%
AB Team	Automation & Robotics	Apr 24	1,704.27	100%
AB Team	Automation & Robotics	May 24	1,781.73	100%
AB Team	Automation & Robotics	Jun 24	1,549.33	100%
AB Team	Automation & Robotics	Jul 24	1,239.47	70%
AB Team	iSeries Mobile Hotspot	Oct 23	116.20	7%
AB Team	Level 1 Training	Oct 23	1,704.27	100%



By Project


 You are viewing 262 resource(s) from 16 manager(s)
 Last Refreshed: [9/29/2023 4:12:40 PM](#)

Allocation Thresho...
 FY. Month
 Resource Manag...
 Resource OBS Type
 Resource Level 2, 3, 4, 5, 6
 Unfilled ...
 Primary Role

Investment Mana...
 Investment OBS Type
 Investment OBS 2, OBS_LEVEL3
 Type
 Investment

Select an Investment Group:

Investment Type	Cost Type	Goal	Progress	Priority
Number of Investments with Over Allocated Resources				
AARD Payments Modules 2023	1	2023-10	<div style="width: 100%;"></div>	126
AB Team	1	2023-11	<div style="width: 100%;"></div>	122
Acquisition FAQ Website	1	2023-12	<div style="width: 100%;"></div>	121
Administration	1	2024-01	<div style="width: 100%;"></div>	110
Agency Team	1	2024-02	<div style="width: 100%;"></div>	102
AI-powered Language Translation ...	1	2024-03	<div style="width: 100%;"></div>	97
Airport Access Security	1	2024-04	<div style="width: 100%;"></div>	93
Alpha Product Phase 1	1	2024-05	<div style="width: 100%;"></div>	90
Analog Team	1	2024-06	<div style="width: 100%;"></div>	90

What's the monthly trend?

% Resource Over Allocated


Investment OBS 2	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	Ma
Administration	8.7%	8.7%	8.7%					
Agile	100.0%	100.0%	100.0%					
Business Operations	54.6%	53.8%	53.0%	58.2%	60.6%	54.7%	53.3%	5
Business Technologies	65.6%	63.6%	63.6%	67.9%	63.7%	60.0%	59.8%	6
Business Transformation	85.7%	84.6%	84.6%	75.0%	75.0%	75.0%	75.0%	6
Corporate	25.0%	25.0%	25.0%	25.0%	37.5%	37.5%	25.0%	
Development	85.3%	85.7%	85.7%	95.7%	91.7%	91.7%	91.7%	9
Mobile Initiatives	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	10
New Product Development	64.0%	64.0%	64.0%	55.6%	61.1%	61.1%	55.6%	10
Operations	65.0%	70.0%	70.0%	66.7%	61.1%	71.4%	50.0%	6
Product Management	50.0%	50.0%	50.0%	50.0%	50.0%	50.0%	50.0%	5
Total	48.3%	47.7%	47.8%	44.7%	41.5%	39.9%	38.6%	3

What are the investments with over allocated resources?

Red highlight indicates the months Resources are Over Allocated in

Investment	Year	Month	2023			2024											
			October	November	December	January	February	March	April	May							
		Resource	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation					
			1	23.47	1	23.47	1	1.07									
AARD Payments Modules 2023			6	86.17	5	83.50	4	78.44	9	268.63	9	342.76	9	342.76	9	359.08	9
AB Team			43	976.80	43	976.80	43	932.40	43	1,021.20	43	932.40	43	932.40	43	976.80	43
Acquisition FAQ Website			4	93.87	4	93.87	4	89.60	6	128.80	6	117.60	6	117.60	6	5.60	
Administration			16	46.57	16	46.57	16	61.51	14	34.35	14	31.36	14	31.36	14	32.85	14
Agency Team			14	328.53	14	328.53	14	313.60	14	343.47	14	313.60	14	313.60	14	328.53	14
AI-powered Language Translation Tool for International Teams			5	105.60	5	105.60	5	100.80	5	110.40	5	91.20					
Airport Access Security			1	13.33	1	6.67	1	6.67									
Alpha Product Phase 1			10	132.82													

Project Resource Details


 Allocation Thresho...
 FY. Month
 Resource Manag...
 Resource OBS Type
 Resource Level 2, 3, 4, 5, 6
 Unfilled...
 Primary Role

You are viewing 262 resource(s) from 16 manager(s)

Last Refreshed: [9/29/2023 4:12:40 PM](#)

Investment Mana...
 Investment OBS Type
 Investment OBS 2, 3
 Type
 Investment

Resource Stats

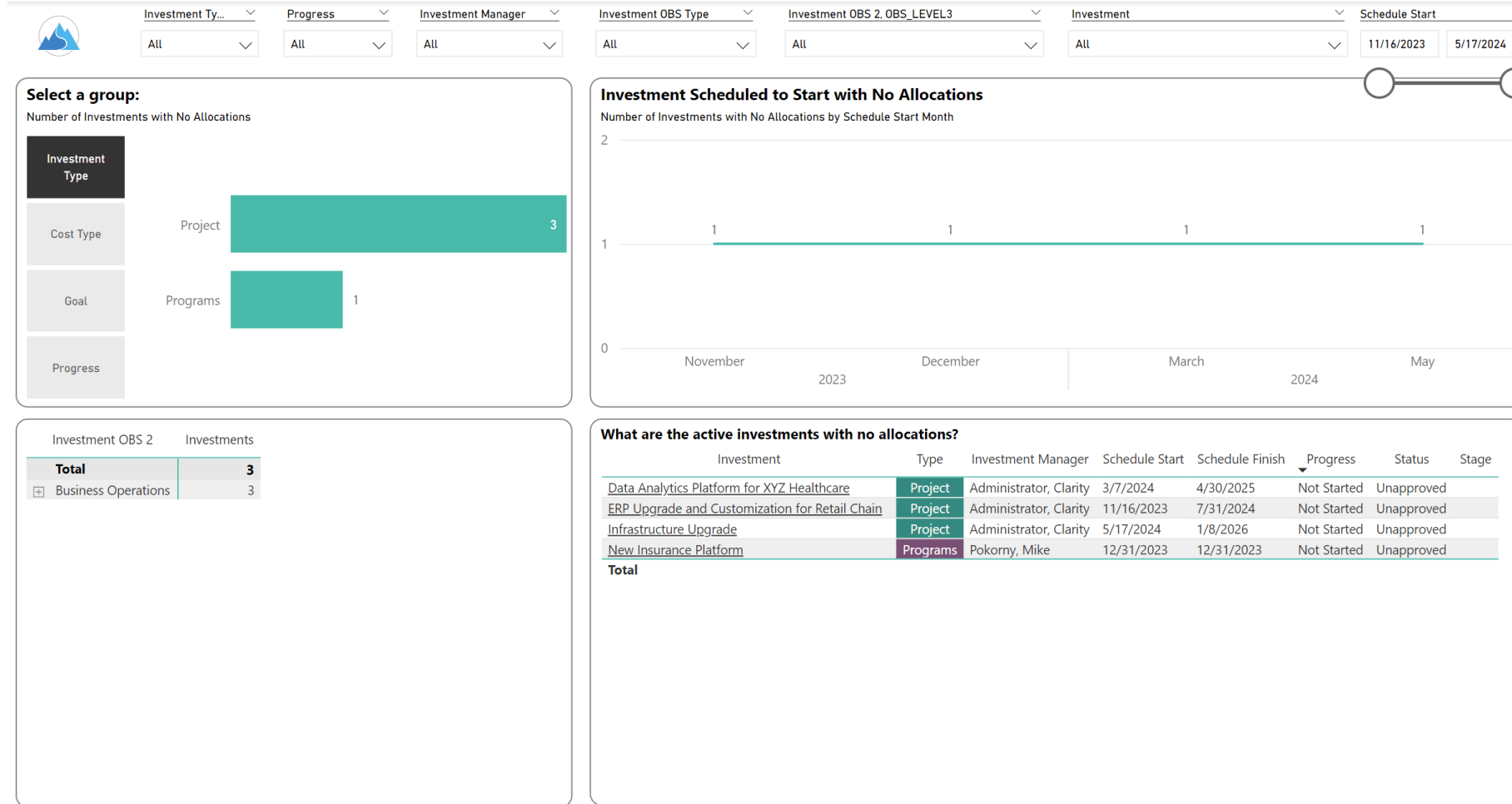
Resource	Month	Investments	Availibility	Allocation	Allocation %	Allocation Status
AB Team	Oct 23	6	1,704.3	4,121.2	241.8%	Over Allocated
AB Team	Nov 23	4	1,704.3	4,005.0	235.0%	Over Allocated
AB Team	Dec 23	4	1,626.8	3,823.0	235.0%	Over Allocated
AB Team	Jan 24	3	1,781.7	2,246.5	126.1%	Over Allocated
AB Team	Feb 24	2	1,626.8	1,626.8	100.0%	Proper Allocated
AB Team	Mar 24	2	1,626.8	1,626.8	100.0%	Proper Allocated
AB Team	Apr 24	2	1,704.3	1,704.3	100.0%	Proper Allocated
AB Team	May 24	2	1,781.7	1,781.7	100.0%	Proper Allocated
AB Team	Jun 24	2	1,549.3	1,549.3	100.0%	Proper Allocated
AB Team	Jul 24	2	1,781.7	1,239.5	69.6%	Under Allocated
AB Team	Aug 24	1	1,704.3	0.0	0.0%	Under Allocated
AB Team	Sep 24	1	1,626.8	0.0	0.0%	Under Allocated
AB Team	Oct 24	1	1,781.7	0.0	0.0%	Under Allocated
Total		135	111,214.7	191,706.8	172.4%	Over Allocated

Investment Stats

Investment	Resources	Over Allocated	% Resource Over Allocated	Schedule Start	Schedule Finish
AI-powered Language Translation Tool for International Teams	5	5	100.0%	1/9/2023	2/27/2024
Alpha Product Phase 1	10	10	100.0%	9/9/2021	10/30/2023
Automation & Robotics	1	1	100.0%	1/1/2023	6/29/2024
Automation & Robotics	3	3	100.0%	4/24/2023	7/22/2024
Battery Monitor	3	3	100.0%	9/1/2022	4/11/2028
Billing AutoPay	7	7	100.0%	2/10/2024	8/28/2024
Billing Self Service Signup	6	6	100.0%	2/6/2023	10/27/2023
Business process re-engineering	1	1	100.0%	7/28/2023	10/11/2023
Chancellor's Concert Series	4	4	100.0%	2/13/2021	12/31/2023
ChatBot Implementation	8	8	100.0%	7/20/2023	1/11/2024
Total	262	132	50.4%		

Investment	Year Month Resource	2023												2024					
		October		November		December		January		February		March		April		May		June	
		Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation
+		1	23.47	1	23.47	1	1.07												
+	AARD Payments Modules	15	86.17	15	83.50	15	78.44	15	285.69	15	365.16	15	365.16	15	382.54	15	399.93	15	347.77
+	AB Team	101	1,680.80	101	1,680.80	101	1,604.40	101	1,757.20	101	1,604.40	101	1,604.40	101	1,680.80	101	1,757.20	101	1,528.00
+	Acquisition FAQ Website	14	211.20	14	211.20	14	201.60	13	251.47	13	229.60	13	229.60	13	55.73				
+	Administration	17	48.92	17	48.92	17	63.75	17	36.80	17	33.60	17	33.60	17	35.20	17	36.80	17	32.00
+	Agency Team	19	410.67	19	410.67	19	392.00	19	429.33	19	392.00	19	392.00	19	410.67	19	429.33	19	373.33
+	AI-powered Language Translation Tool for International Teams	5	105.60	5	105.60	5	100.80	5	110.40	5	91.20								
+	Airport Access Security	13	13.33	13	6.67	13	6.67												
+	Alpha Product Phase 1	10	132.82																
+	Analog Team	9	187.73	9	187.73	9	179.20	9	196.27	9	179.20	9	179.20	9	187.73	9	196.27	9	170.67
+	Analytics Target Report	12	310.93	12	310.93	12	296.80	11	325.07	11	296.80	11	296.80	11	310.93	11	325.07	11	282.67

No Allocation by Project



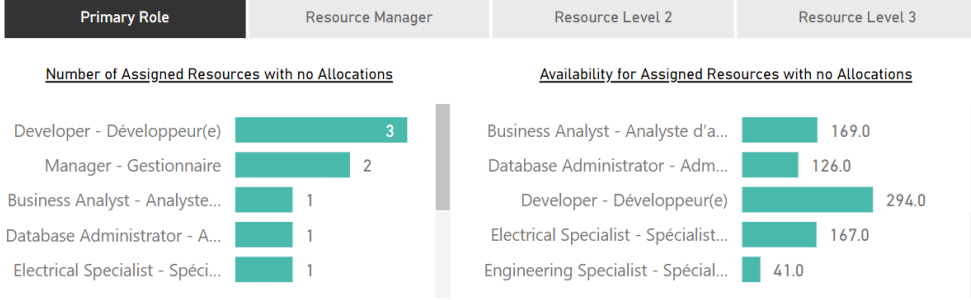
No Allocation by People



Last Refreshed:
10/17/2023 5:26:35 PM

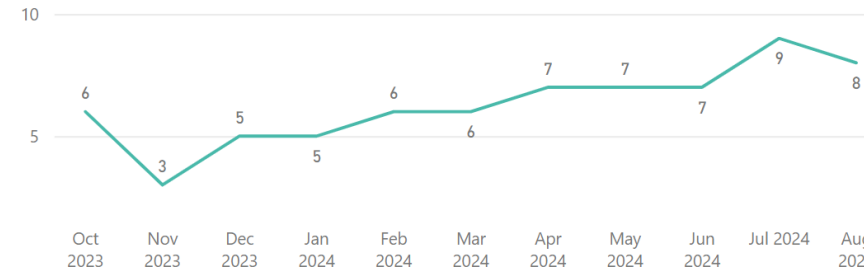
FY, Period: FY 2024
 Resource Manager: All
 Resource OBS Type: Financial Department OBS
 Resource Level 2, 3, 4, 5, 6: All
 Resource: All
 Booking Manager: All
 Unfilled Role?: All
 Primary Role: Multiple selections

Select a group:



Assigned Resources with No Allocations

Number of Assigned Resources with no allocations



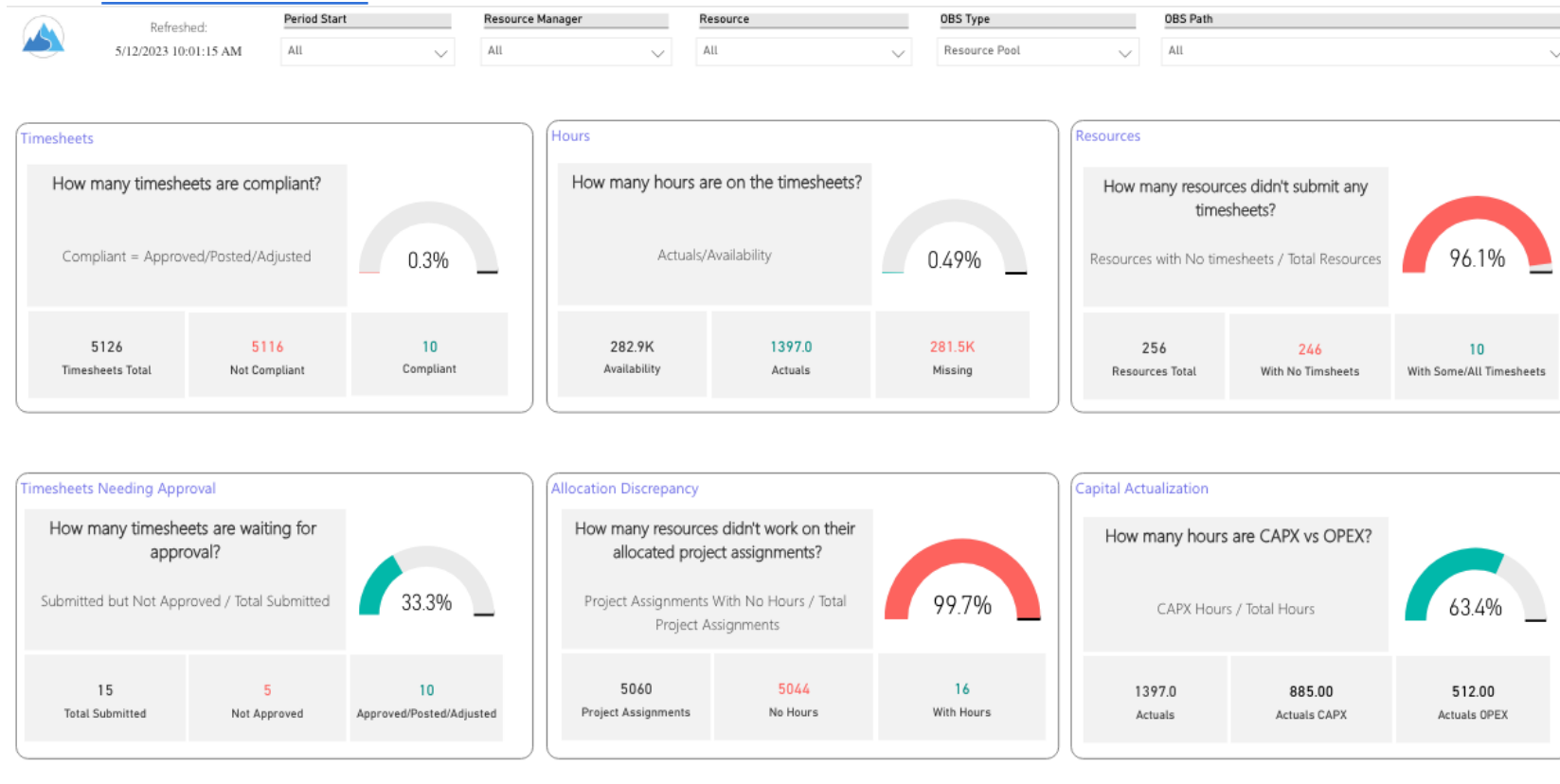
Resource Level 2	Not Allocated %	Resources	Not Allocated
Total	0.4%	3,406	12
Chief Strategy Officer (CSO)	0.2%	445	1
CHRO		151	
Executive Management-6		12	
Finance-6		74	
Internal Audit-6		5	
Legal and Corporate Services-		93	
Office of Safety and Quality		38	
Operations	0.2%	1,144	2
Technology	0.6%	1,444	9

Resource	Month	Availability	Resource Manager	Email	Booking Manager	Primary Role
Allaby, Colleen	May 24	22.0	Dugas, Ian			Manager - Gestionnaire
Allaby, Colleen	Jul 24	22.0	Dugas, Ian			Manager - Gestionnaire
Kinnie, Brian	Jan 24	22.0	Smith, Calvin		Sullivan, Cassandra	Electrical Specialist - Spécialiste en élec
Kinnie, Brian	May 24	22.0	Smith, Calvin		Sullivan, Cassandra	Electrical Specialist - Spécialiste en élec
Kinnie, Brian	Jul 24	22.0	Smith, Calvin		Sullivan, Cassandra	Electrical Specialist - Spécialiste en élec
Konrad, Gregory	Jan 24	22.0	Cruse, Terry			Manager - Gestionnaire
Konrad, Gregory	May 24	22.0	Cruse, Terry			Manager - Gestionnaire
Konrad, Gregory	Jul 24	22.0	Cruse, Terry			Manager - Gestionnaire
MacPherson, Laurie	Jul 24	22.0	Kluew, Vlad		Kluew, Vlad	Developer - Développeur(e)
Samarin, Pavel	Jan 24	22.0	Westlund, J.P.			Business Analyst - Analyste d'affaires
Samarin, Pavel	May 24	22.0	Westlund, J.P.			Business Analyst - Analyste d'affaires
Samarin, Pavel	Jul 24	22.0	Westlund, J.P.			Business Analyst - Analyste d'affaires

Timesheet Compliance



Timesheet Summary



Timesheet Detail

You are viewing 255 resources from 14 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start: All

Resource Manager: All

Resource: All

OBS Type: Corporate Departme...

OBS Path: All

Timesheets Summary

- 2550**
Total
- 13**
Open
- 2532**
Missing
- 4**
Submitted
- 0**
Returned
- 1**
Approved/Posted/Adjusted

Show me open timesheets by: Resource Manager Resource OBS Resource Class Employment Type Vendor Department Primary Role

Click anywhere on the charts to filter the detailed resource list:

Open Timesheets Trend

Open Timesheets

Role	Count
(Blank)	240
SME	200
Project Manager BT	160
Developer	140
Engineer	140
Project Manager	140
Test Engineer	118
Architect	108
Business Analyst	80
Network Engineer	70
Product Manager	60
Team Lead	60
Champion	59

Who are the **255** resource(s) with **2290** missing timesheets?

Resource Manager	Resource	Period Start	Timesheet Status	Booking Manager	Department	Primary Role	Resource Class	Vendor	OBS Type	OBS Path
Administrator, Clarity	Pokorny, Mike	1/23/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	1/30/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	2/6/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	2/13/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	2/20/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	2/27/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	3/13/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	3/20/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	3/27/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Hensel, Ross	Abbott, Karl	1/23/23	Open		Product Management PPM	SW Engineer	Internal Labor		Corporate Department OBS	Product Management Product Management PPM
Hensel, Ross	Abbott, Karl	1/30/23	Open		Product Management PPM	SW Engineer	Internal Labor		Corporate Department OBS	Product Management Product Management PPM
Hensel, Ross	Abbott, Karl	2/6/23	Open		Product Management PPM	SW Engineer	Internal Labor		Corporate Department OBS	Product Management Product Management PPM
Hensel, Ross	Abbott, Karl	2/13/23	Open		Product Management PPM	SW Engineer	Internal Labor		Corporate Department OBS	Product Management Product Management PPM
Total			Open							

Resource Detail

You are viewing 255 resources from 14 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start: All | Resource Manager: All | Resource: All | OBS Type: Corporate Departme... | OBS Path: All

Show me resource counts with some or no timesheets by: Resource Manager | OBS Path

Resources

255
Resources Total

254 With no timesheets	99.6% Not Compliant %
1 With some timesheets	0.4% Partially Compliant %
0 With all timesheets	0.0% Fully Compliant %

Resources with missing timesheet Trend

● Administrator, Clarity ● Hensel, Ross ● Joseph, Derrick ● Kumar, Arun ● Lewis, Dana ● Malone, Rosie

Week	Administrator, Clarity	Hensel, Ross	Joseph, Derrick	Kumar, Arun	Lewis, Dana	Malone, Rosie
1/23/23	13	14	21	52	71	20
1/30/23	13	14	21	52	71	20
2/6/23	13	14	21	52	71	20
2/13/23	13	14	21	52	71	20
2/20/23	13	14	21	52	71	20
2/27/23	13	14	21	52	71	20
3/6/23	13	14	21	52	71	20
3/13/23	13	14	21	52	71	20
3/20/23	13	14	21	52	71	20
3/27/23	13	14	21	52	71	20

Resources with missing timesheets

Miller, Rosie	71
Miller, Robert	52
Tennyson, Peter	38
Malone, Rosie	21
Montoya, Mark	20
Joseph, Derrick	14
Kumar, Arun	13
Hensel, Ross	8
Lewis, Dana	8
Parks, Michael	7
Administrator, Clarity	1
Reling, Lynn	1
Toland, Ryan	1

Select a OBS/Manager
Who has low Compliance?

Timesheet Compliance

Resource Manager	Compliance %
Hensel, Ross	0.0%
Joseph, Derrick	0.0%
Kumar, Arun	0.0%
Lewis, Dana	0.0%
Malone, Rosie	0.0%
Miller, Robert	0.0%
Montoya, Mark	0.0%
Parks, Michael	0.0%
Reling, Lynn	0.0%
Total	0.2%

Select a Resource (or multiple with CTRL key)
Which resource caused it?

Timesheet Compliance by Resource Manager -> Resource

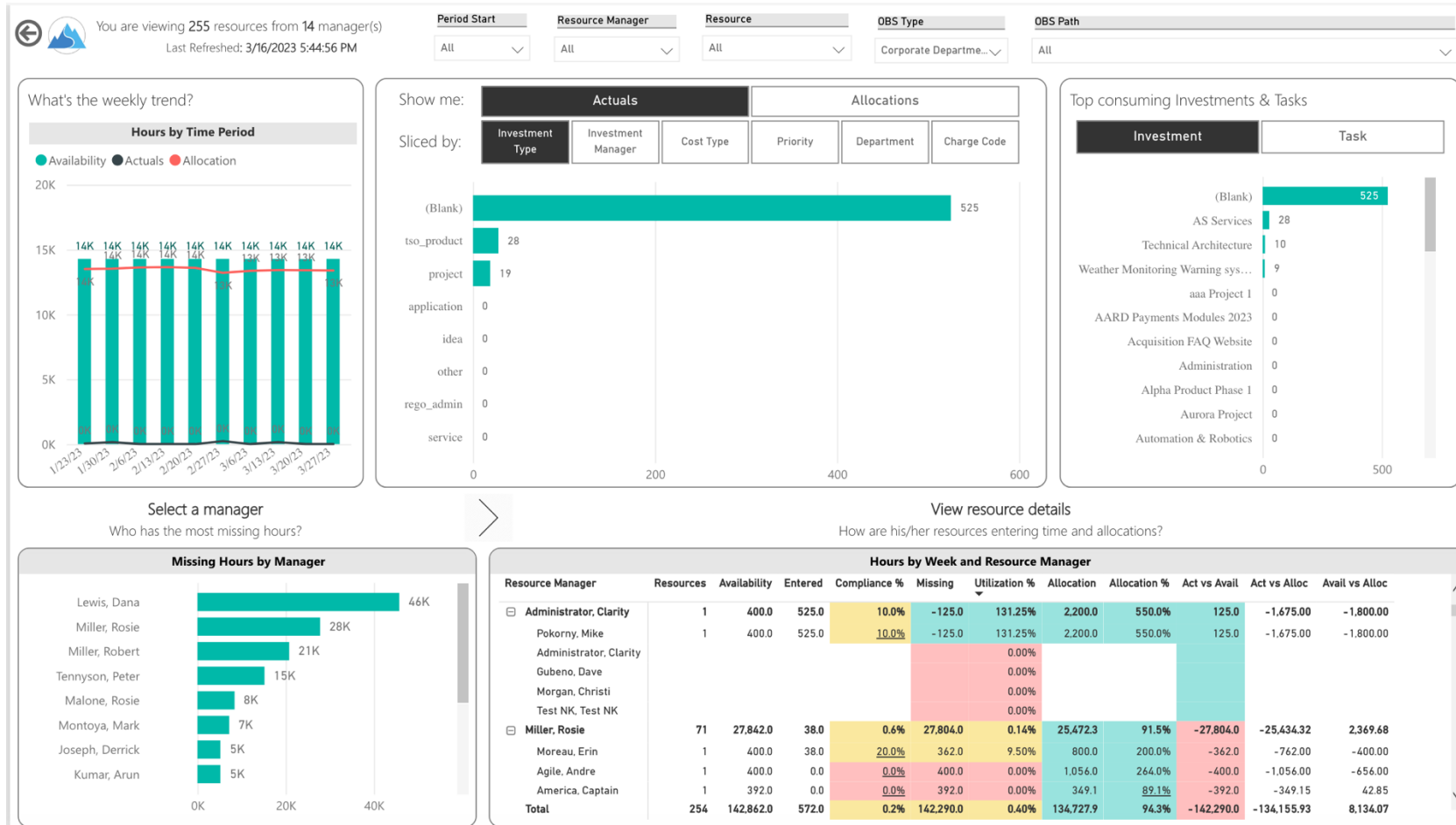
Resource Manager	1/23/23	1/30/23	2/6/23	2/13/23	2/20/23	2/27/23	3/6/23	3/13/23	3/20/23	3/27/23	Total
Administrator, Clarity	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	10.0%
Miller, Rosie	1.4%	0.0%	0.0%	0.0%	1.4%	0.0%	1.4%	0.0%	0.0%	0.0%	0.6%
Hensel, Ross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Joseph, Derrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kumar, Arun	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lewis, Dana	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malone, Rosie	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Miller, Robert	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.4%	0.0%	0.0%	0.0%	0.4%	0.0%	0.8%	0.4%	0.0%	0.0%	0.2%

View this resource's stats
How has he/she performed over time? What are his/her hours?

Hours by Week and Resource Manager

Resource Manager	1/23/23	1/30/23	2/6/23	2/13/23	2/20/23	2/27/23	3/6/23	3/13/23	3/20/23
Administrator, Clarity	1	1	1	1	1	1	1	1	1
Resources	40.0	40.0	40.0	40.0	40.0	40.0	40.0	40.0	40.0
Availability	0.0	150.0	0.0	0.0	0.0	225.0	0.0	150.0	0.0
Entered	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%
Compliance %	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%
Missing	40.0	-110.0	40.0	40.0	40.0	-185.0	40.0	-110.0	40.0
Utilization %	0.00%	375.00%	0.00%	0.00%	0.00%	562.50%	0.00%	375.00%	0.00%
Allocation	220.0	220.0	220.0	220.0	220.0	220.0	220.0	220.0	220.0
Allocation %	550.0%	550.0%	550.0%	550.0%	550.0%	550.0%	550.0%	550.0%	550.0%

Hours Detail



Unapproved Timesheets

You are viewing 255 resources from 14 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start: All | Resource Manager: All | Resource: All | OBS Type: Corporate Departme... | OBS Path: All

Timesheets Submitted

- 5 Total Submitted
- 4 Not Approved
- 1 Approved/Posted/Adjusted
- 80.0% Timesheet Not Approved %

Show me submitted timesheets awaiting approval by:

Resource Manager | Resource OBS | Resource Class | Employment Type | Vendor | Department | Primary Role

Submitted Timesheets Trend

Date	Architect	Champion	Test Engineer
2/20/23	1	0	0
3/6/23	1	1	0
3/13/23	0	0	1

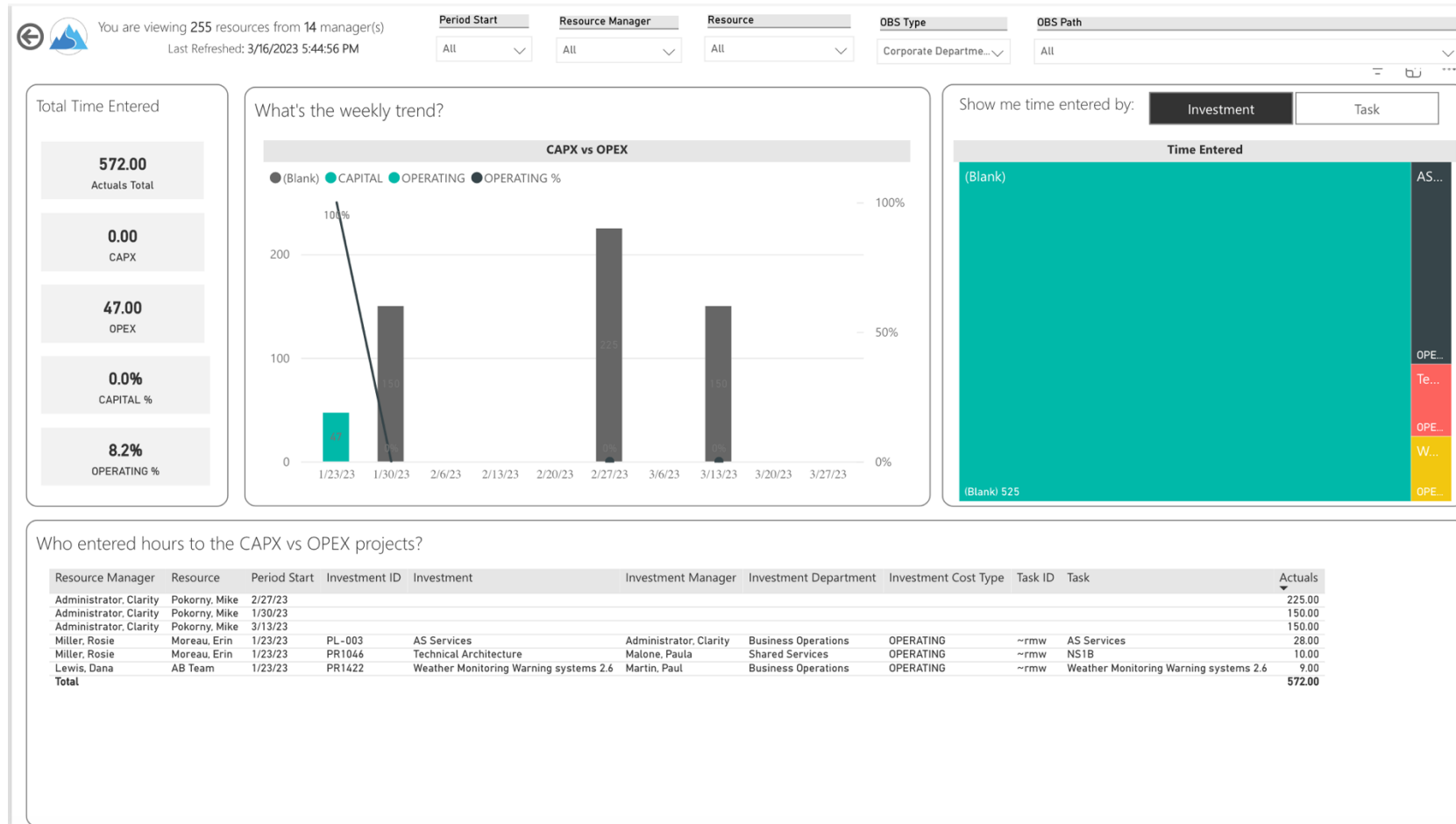
Submitted Timesheets

Role	Count
Architect	2
Champion	1
Test Engineer	1

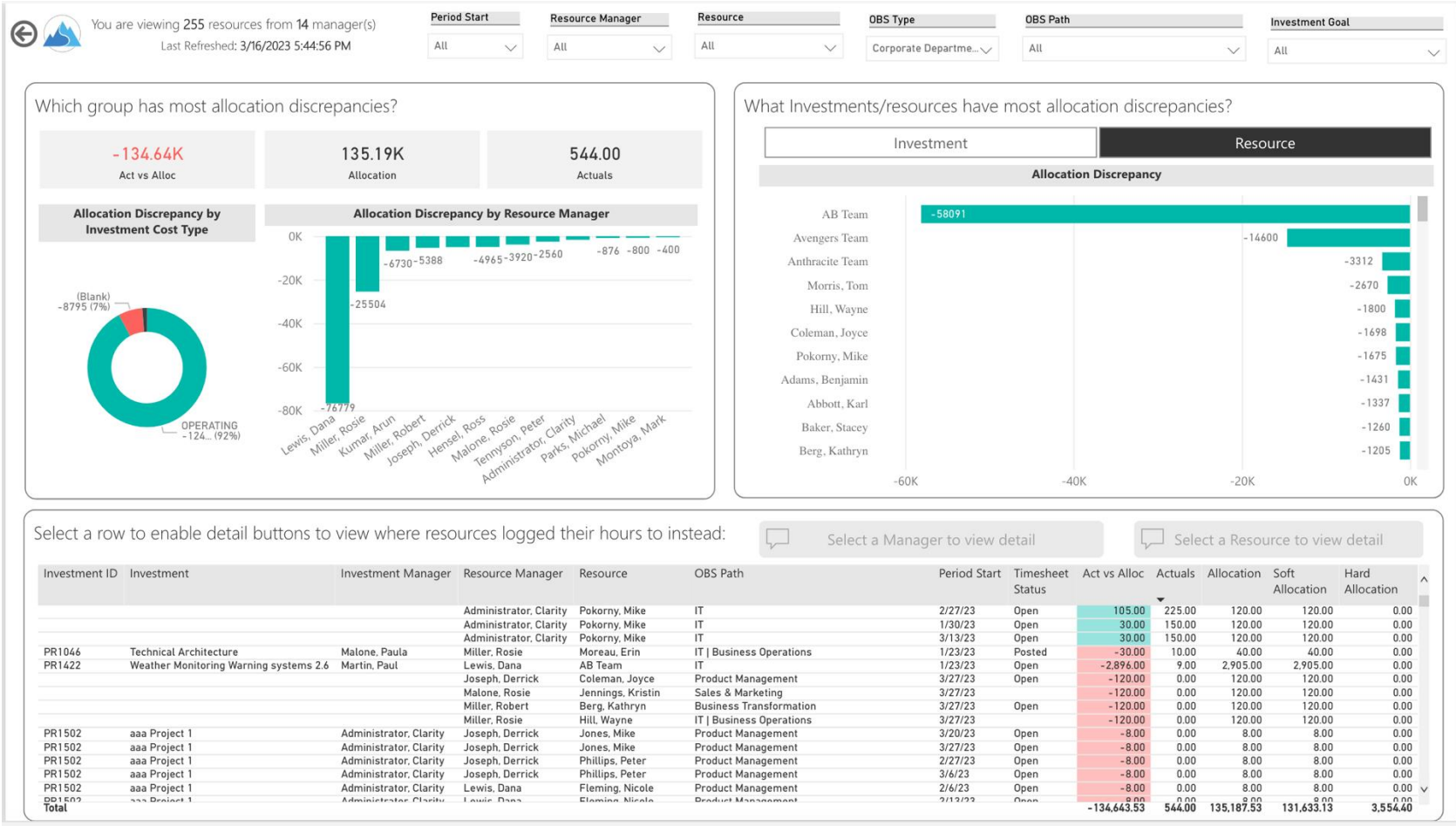
Who are the 2 Resource(s) With 3 Submitted Timesheets?

Resource Manager	Resource	Period Start	Timesheet Status	Booking Manager	Department	Primary Role	Resource Class	Vendor	EMPLOYMENT_TYPE
Administrator, Clarity	Pokorny, Mike	3/6/23	Submitted		IT	Champion	Internal Labor		Employee
Miller, Rosie	Moreau, Erin	3/13/23	Submitted	Miller, Rosie	Business Operations	Test Engineer	Internal Labor		Employee
Miller, Rosie	Morris, Tom	2/20/23	Submitted	Miller, Rosie	Shared Services	Architect	Internal Labor		Employee
Miller, Rosie	Morris, Tom	3/6/23	Submitted	Miller, Rosie	Shared Services	Architect	Internal Labor		Employee

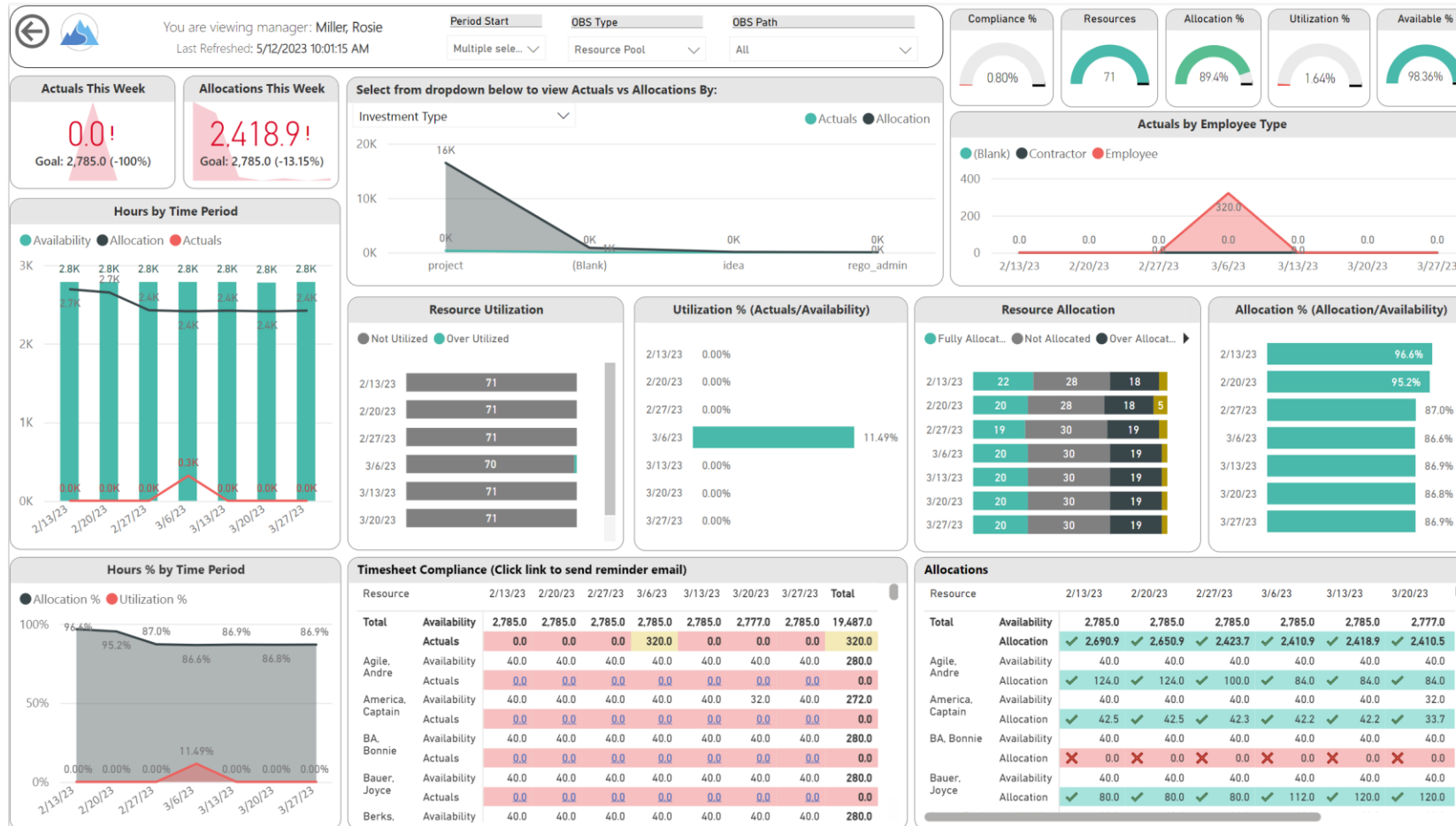
Capex vs Opex



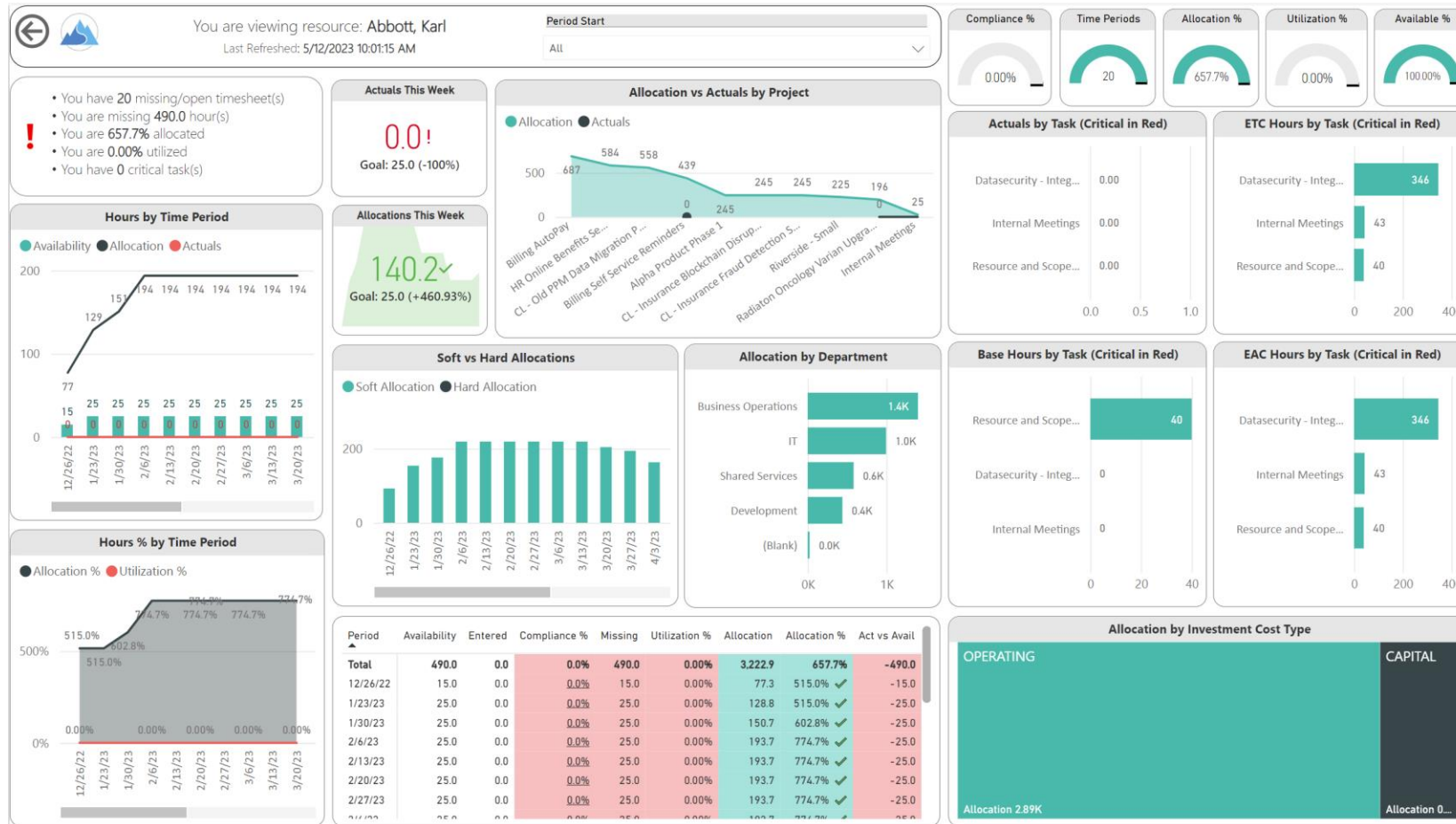
Allocation Variance



Single Manager Drill Down



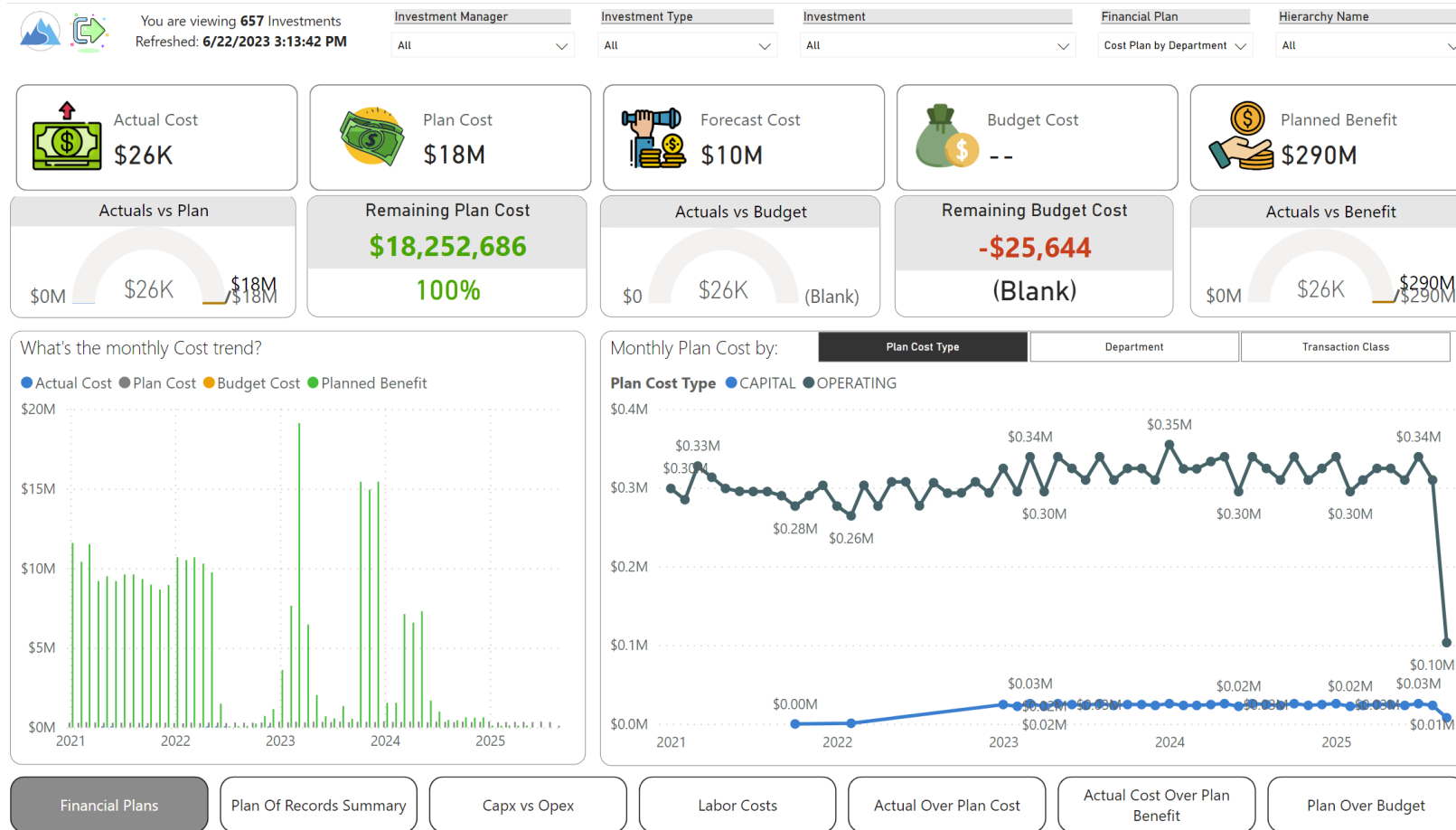
Single Resource Drill Down



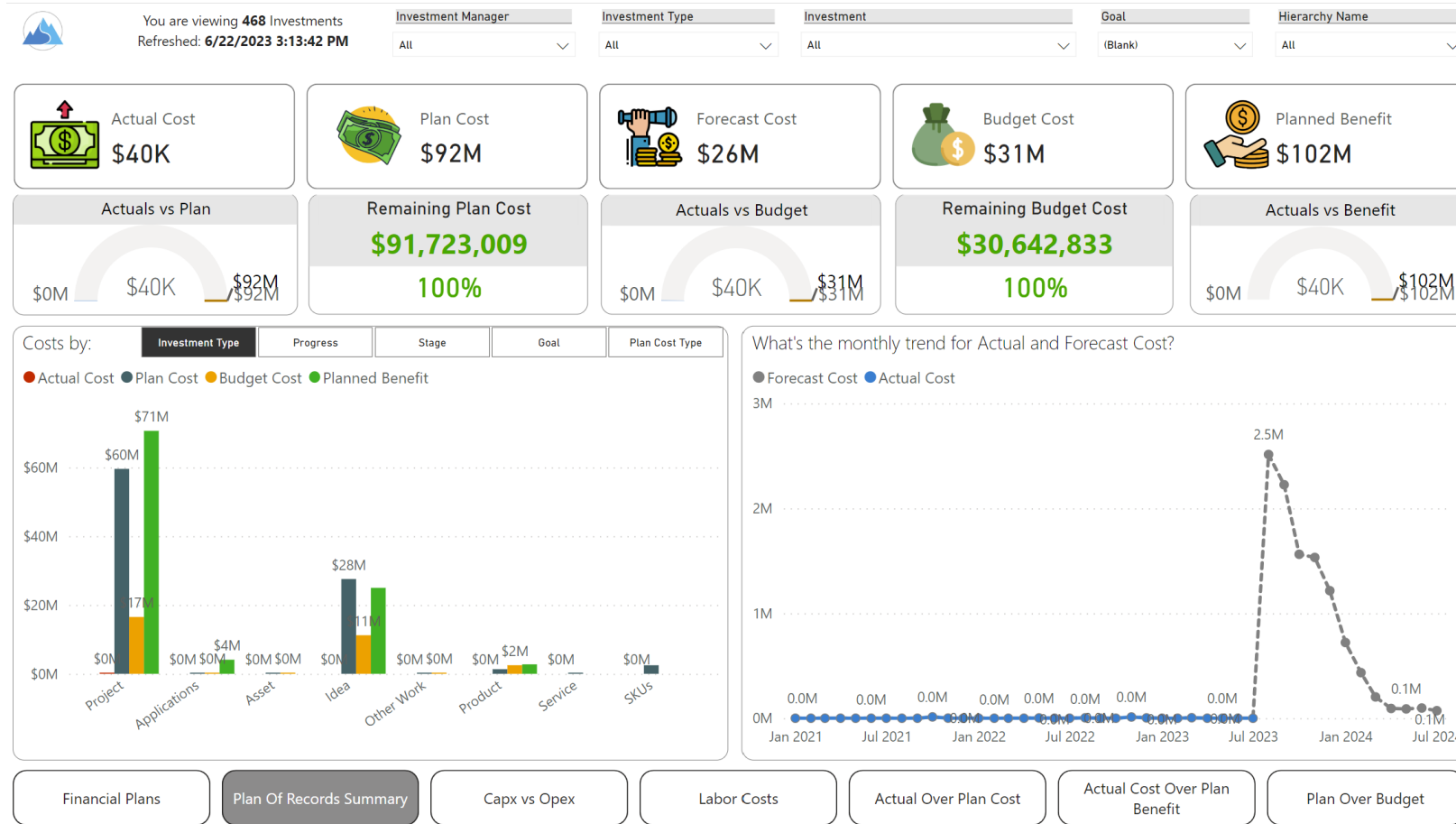
Financial



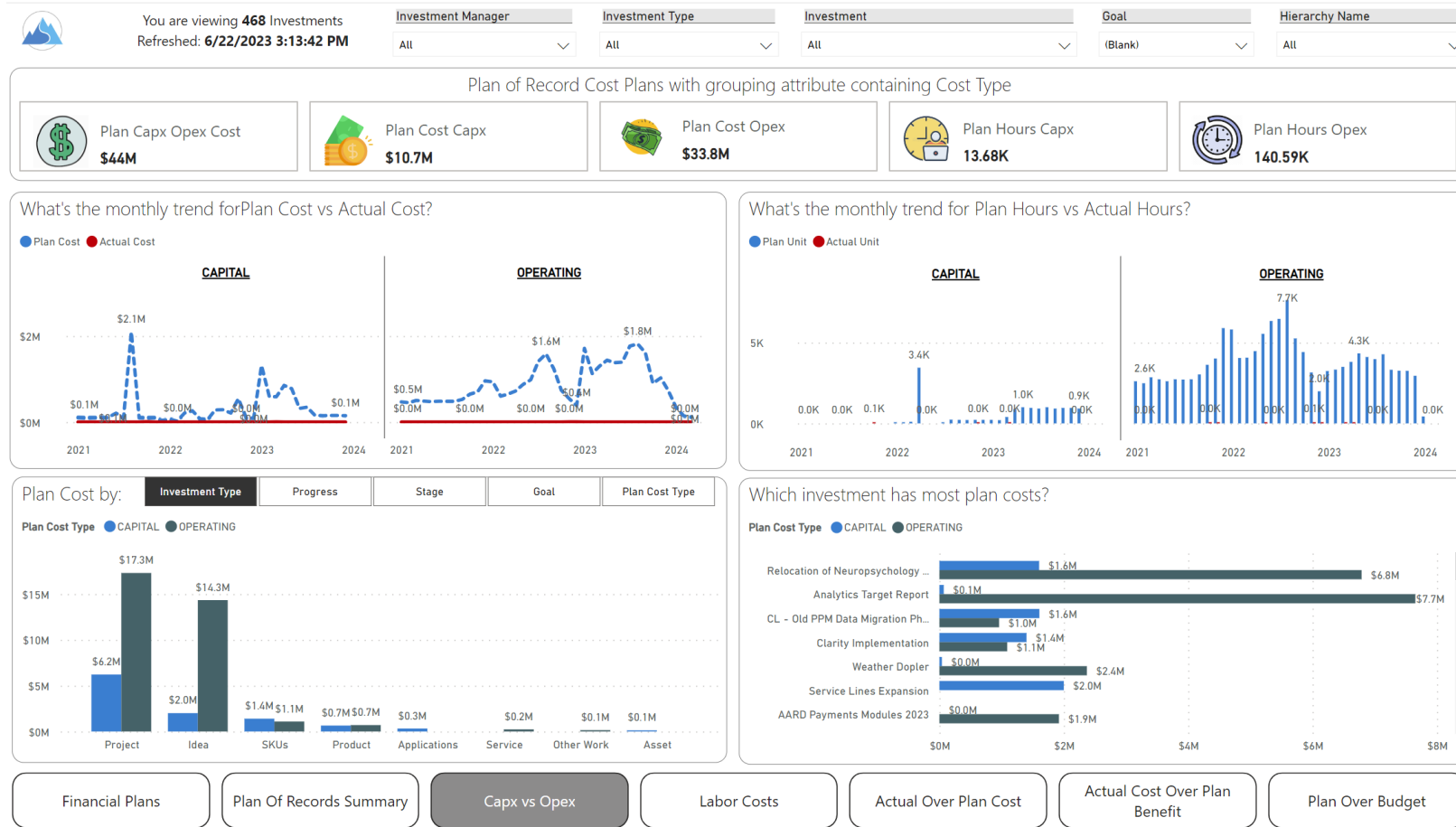
Financial Plans



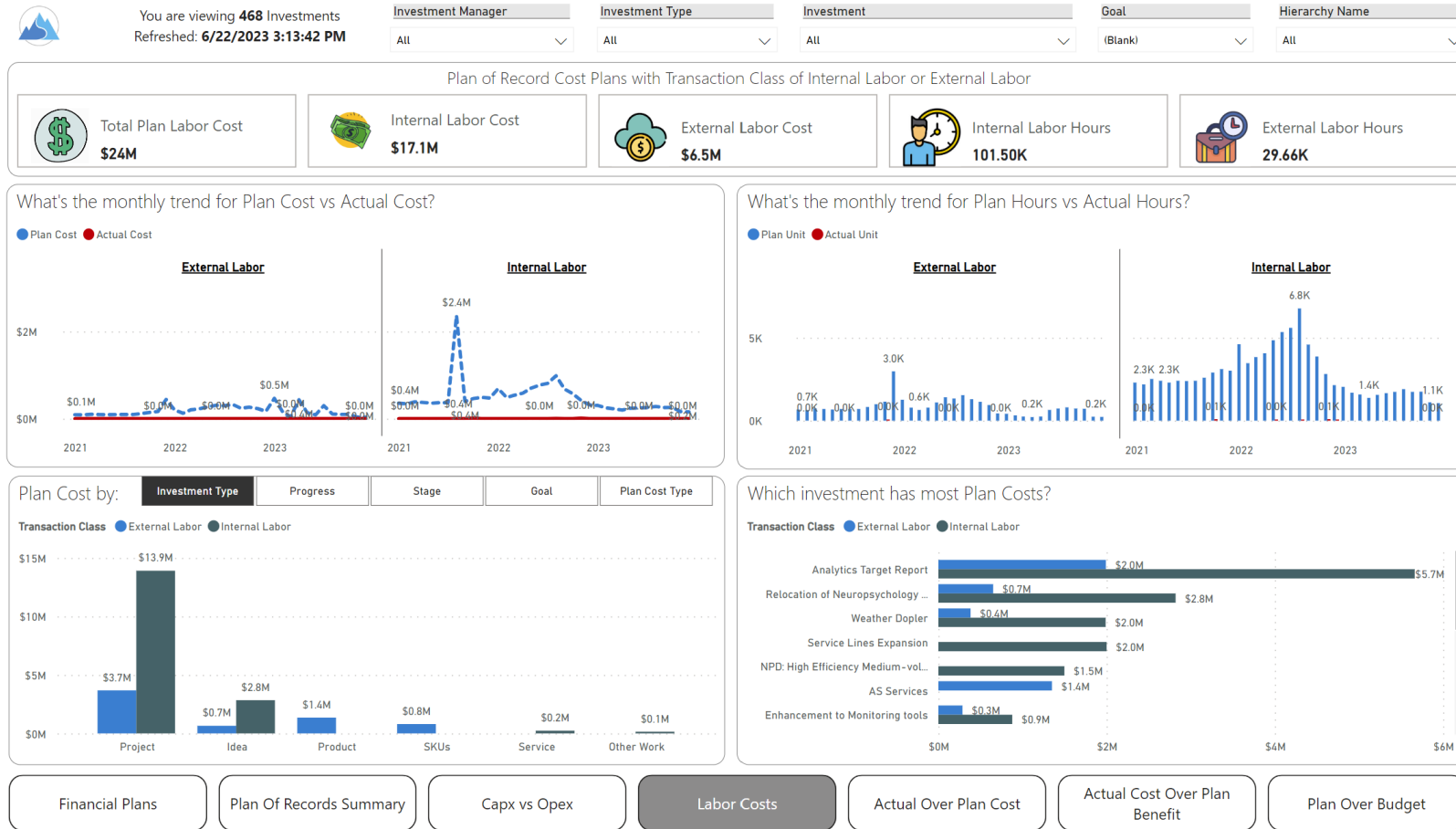
Plan of Records Summary



Capex vs Opex



Labor Cost



Actual Over Plan Cost

You are viewing **468** Investments
Refreshed: 6/22/2023 3:13:42 PM

Investment Manager: All | Investment Type: All | Investment: All | Goal: (Blank) | Hierarchy Name: All

How many investments' Plan of Record's Actual Cost is Over Plan Cost?

- Investments: 3
- Plan Cost: 0.00
- Actual Cost: 25.82K
- Over by: -25.82K
- Over %: --

Which Investment has most variance (Plan Cost - Actual Cost)?

Legend: Actual Cost (blue), Plan Cost (grey), Plan - Actual (yellow)

- Telecom Audit
- Apollo Product Launch
- x_Oracle DB
- Annual Maintenance
- New application for Skus
- Marketing Request Template

Which month has most variance (Plan Cost - Actual Cost)?

Legend: Actual Cost (blue), Plan Cost (grey)

Build your own matrix! Group investments by:

Month	May 2023		June 2023		July 2023		August 2023	September 2023	October 2023	November 2023	December 2023	January 2024	February 2024	Mar 2024
	Actuals	Variance to Plan	Actuals	Variance to Plan	Actuals	Variance to Plan	Plan	Plan	Plan	Plan	Plan	Plan	Plan	Plan
Applications														
Asset														
Idea	0.00	1,817,171.76	0.00	1,477,636.90	0.00	1,469,988.46	1,738,690.72	1,556,744.11	840,045.48	968,708.09	677,789.73	474,503.64	273,763.56	
Other Work														
Product	0.00	190,855.80	0.00	87,924.97	0.00	90,855.80	90,855.80	87,924.97	90,855.80	87,924.97	90,855.80	90,855.80	84,994.14	
Project	0.00	710,723.46	0.00	6,254,981.90	0.00	5,357,920.34	872,021.32	757,236.34	815,477.98	656,516.04	626,674.40	344,348.98	232,558.70	
Total	0.00	2,718,751.02	0.00	7,820,543.77	0.00	7,338,764.61	2,701,567.84	2,401,905.43	1,746,379.27	1,713,149.10	1,395,319.94	909,708.42	591,316.40	

Navigation: Financial Plans | Plan Of Records Summary | Capx vs Opex | Labor Costs | **Actual Over Plan Cost** | Actual Cost Over Plan Benefit | Plan Over Budget

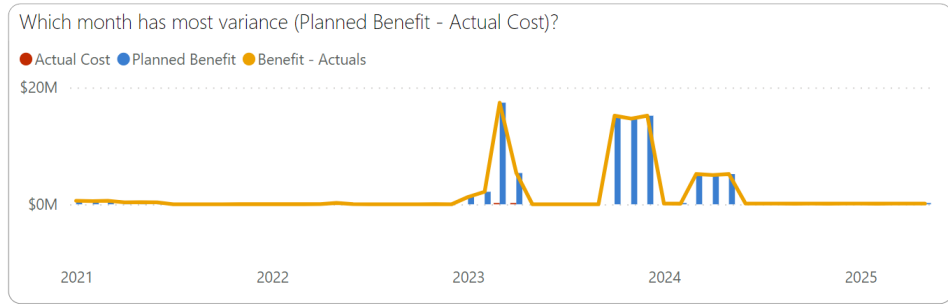
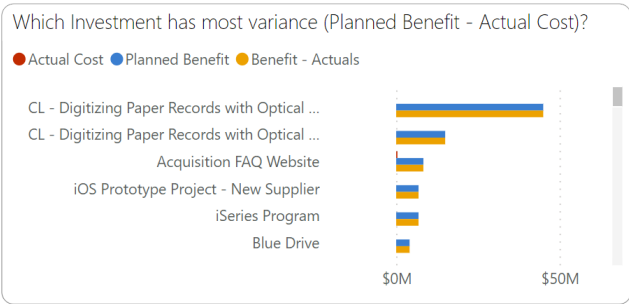
Actual Cost Over Plan Benefit

You are viewing **468** Investments
Refreshed: 6/22/2023 3:13:42 PM

Investment Manager: All | Investment Type: All | Investment: All | Goal: (Blank) | Hierarchy Name: All

How many investment's Plan of Record's Actual Cost is Over Planned Benefit?

- Investments: 2
- Planned Benefit: --
- Actual Cost: 21.52K
- Over By: -21.52K
- Over %: --



Build your own matrix! Group investments by:

Investment Type	January 2021		February 2021		March 2021		April 2021		May 2021		June 2021	
	Benefit	Actuals	Benefit - Actuals	Benefit	Actuals	Benefit - Actuals	Benefit	Actuals	Benefit - Actuals	Benefit	Actuals	Benefit - Actuals
Applications												
Asset												\$0
Idea												
Other Work		\$0	\$0		\$0	\$0		\$0	\$0		\$0	\$0
Total	\$602,778	\$0	\$602,778	\$544,444	\$0	\$544,444	\$602,778	\$0	\$602,778	\$329,670	\$0	\$329,670

Navigation buttons: Financial Plans | Plan Of Records Summary | Capx vs Opex | Labor Costs | Actual Over Plan Cost | **Actual Cost Over Plan Benefit** | Plan Over Budget

Plan Over Budget Cost

You are viewing **468** Investments
Refreshed: 6/22/2023 3:13:42 PM

Investment Manager: All | Investment Type: All | Investment: All | Goal: (Blank) | Hierarchy Name: All

How many investment's Plan of Record's Plan Cost is Over Budget Cost?

- Investments: 49
- Budget Cost: --
- Plan Cost: 91.76M
- Over By: -91.76M
- Over %: --

Which Investment has most variance (Budget Cost - Plan Cost)?

Legend: Budget Cost (Blue), Plan Cost (Grey), Budget - Plan Cost (Yellow)

- CL - Digitizing Paper Records with Optical ...
- CL - Digitizing Paper Records with Optical ...
- Relocation of Neuropsychology Program
- CL - Old PPM Data Migration Phase 3
- Clarity Implementation
- Service Lines Expansion

Which month has most variance (Budget Cost - Plan Cost)?

Legend: Budget Cost (Blue), Plan Cost (Grey), Budget - Plan Cost (Yellow)

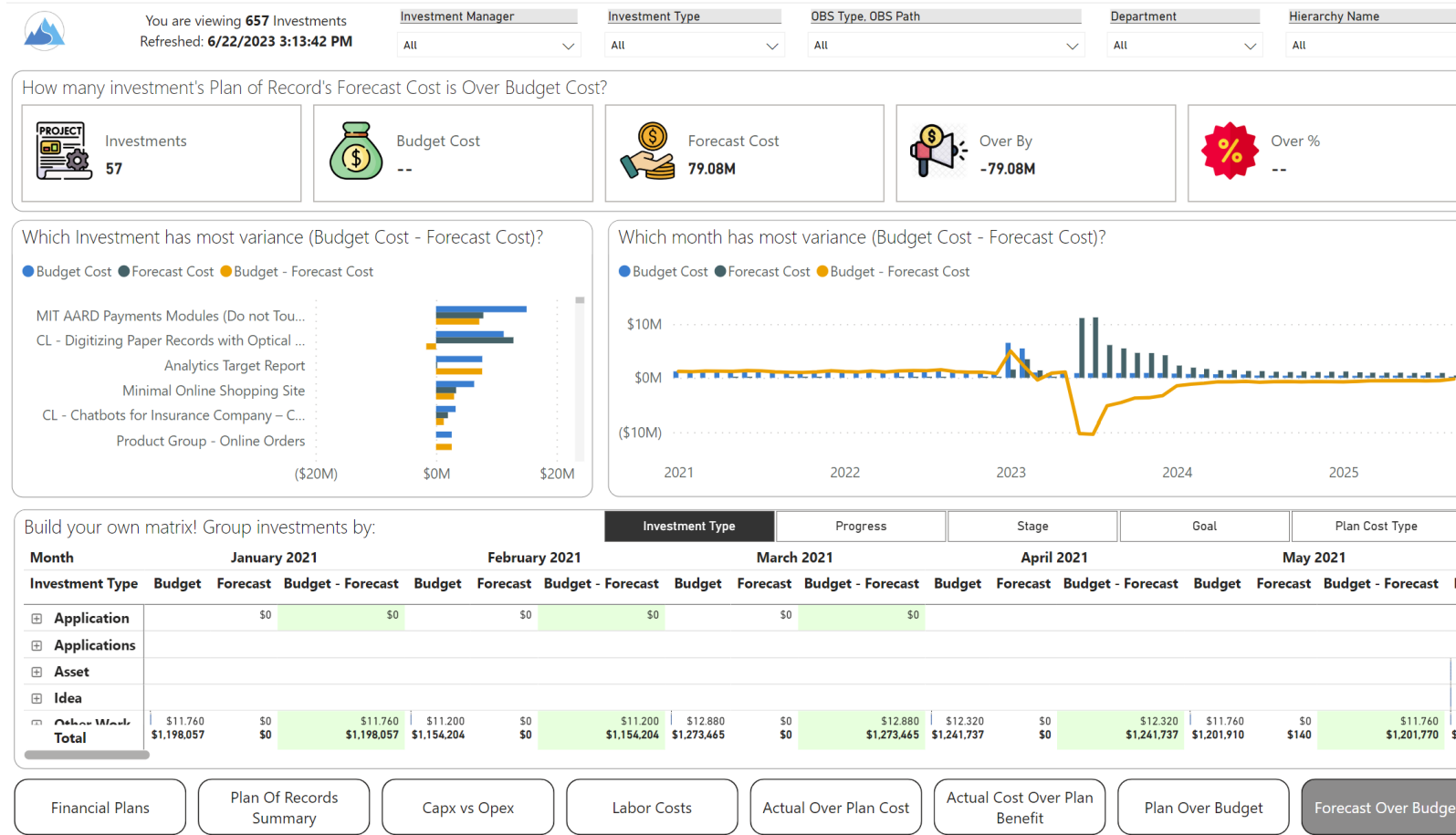
Jan 2021, Jul 2021, Jan 2022, Jul 2022, Jan 2023, Jul 2023, Jan 2024, Jul 2024

Build your own matrix! Group investments by:

Month	January 2021			February 2021			March 2021			April 2021			May 2021			June 2021		
	Budget	Plan	Budget - Plan	Budget	Plan	Budget - Plan	Budget	Plan	Budget - Plan	Budget	Plan	Budget - Plan	Budget	Plan	Budget - Plan	Budget	Plan	Budget - Plan
Applications																		
Asset																\$100,000	\$100,000	0.00
Idea																		
Other Work	\$11,760	\$11,760	0.00	\$11,200	\$11,200	0.00	\$12,880	\$12,880	0.00	\$12,320	\$12,320	0.00	\$11,760	\$11,760	0.00	\$12,320	\$12,320	0.00
Product Total	\$819,138	\$607,176	211,961.42	\$799,179	\$577,417	221,761.30	\$859,055	\$642,235	216,820.65	\$839,096	\$625,524	213,572.53	\$819,138	\$609,243	209,894.42	\$939,096	\$720,739	218,357.53

Financial Plans | Plan Of Records Summary | Capx vs Opex | Labor Costs | Actual Over Plan Cost | Actual Cost Over Plan Benefit | **Plan Over Budget**

Forecast Over Budget Cost



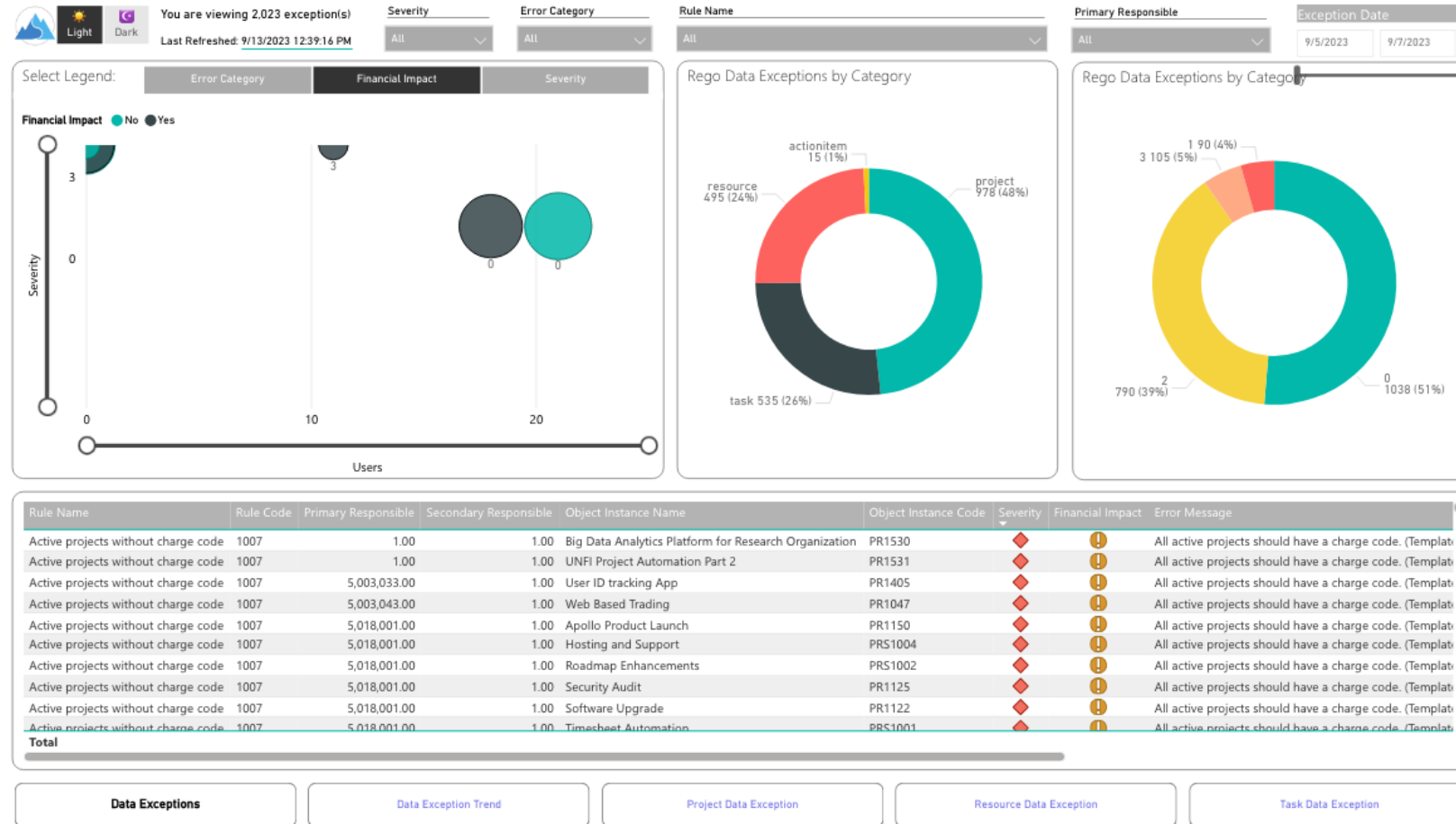
Data Integrity



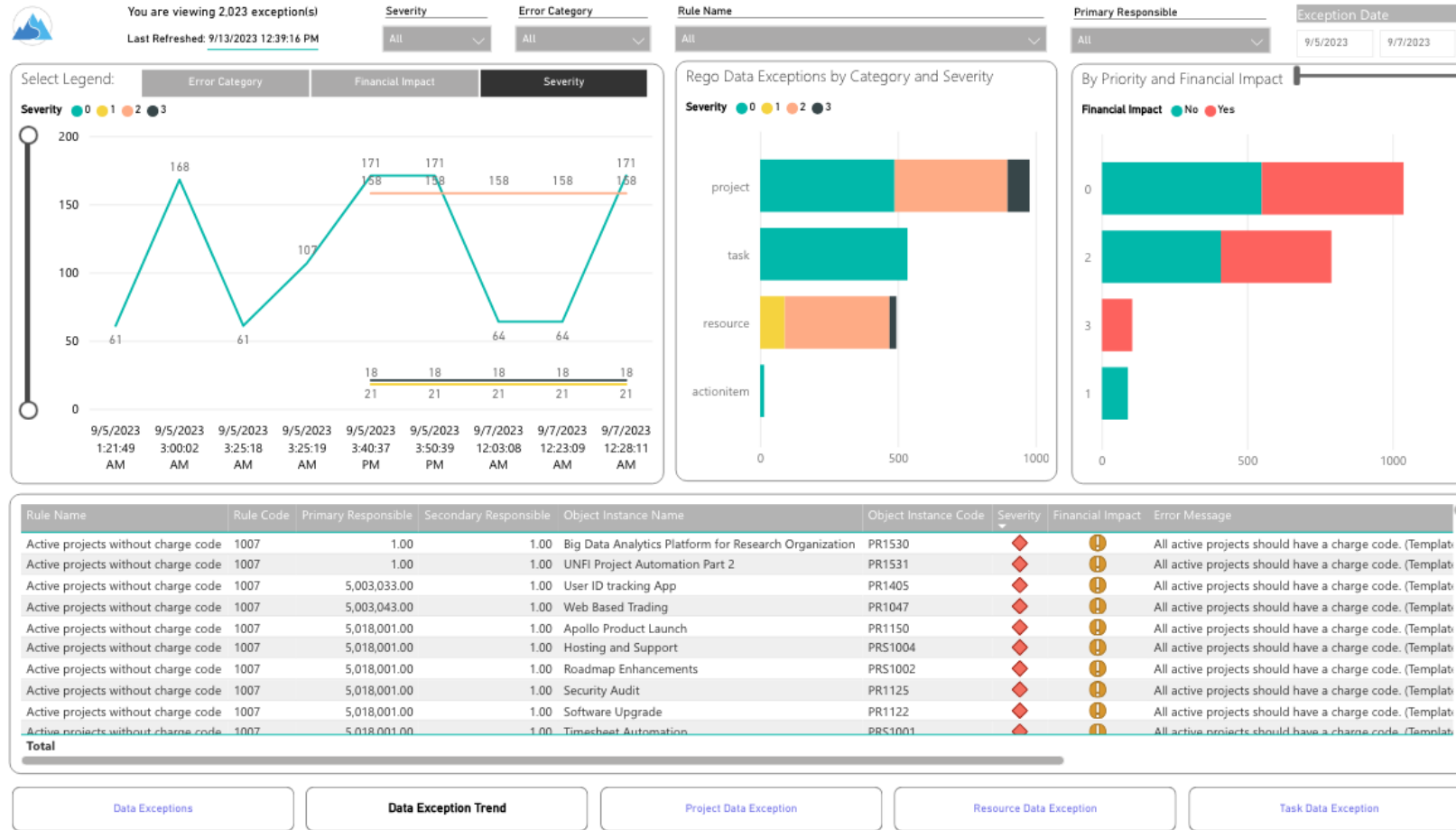
regoUniversity

KANSAS CITY • 2024

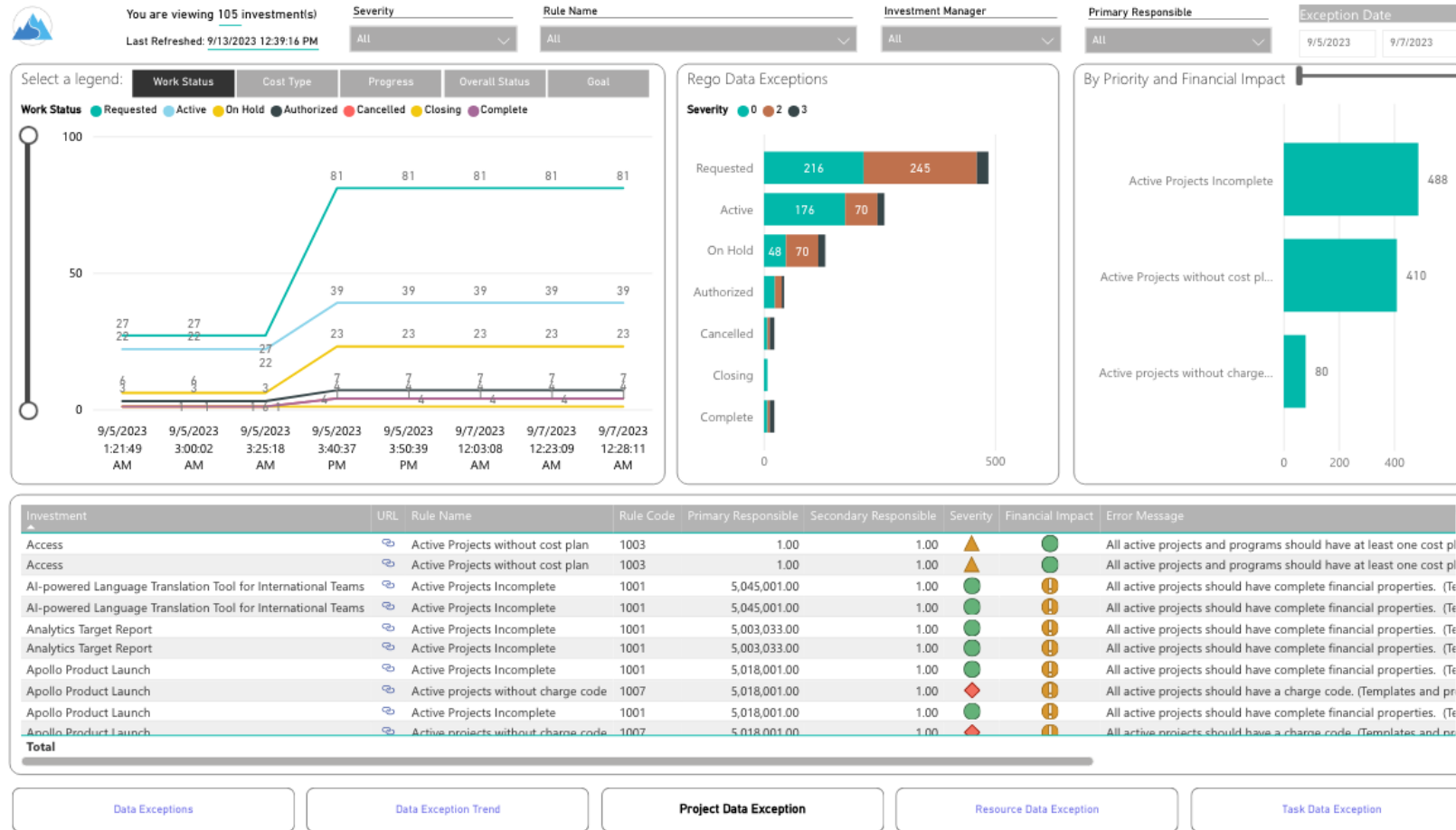
Data Exceptions



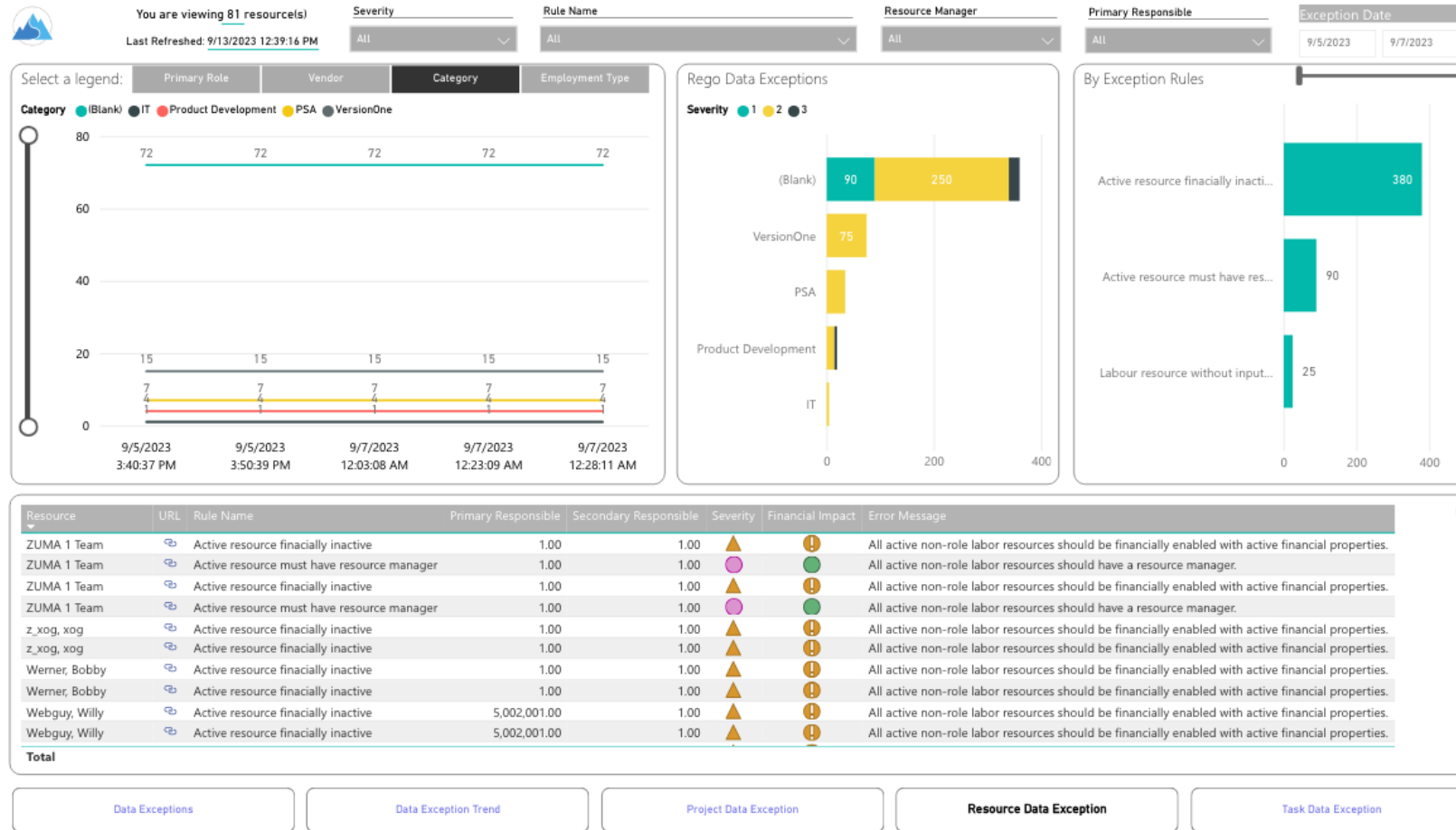
Data Exception Trend



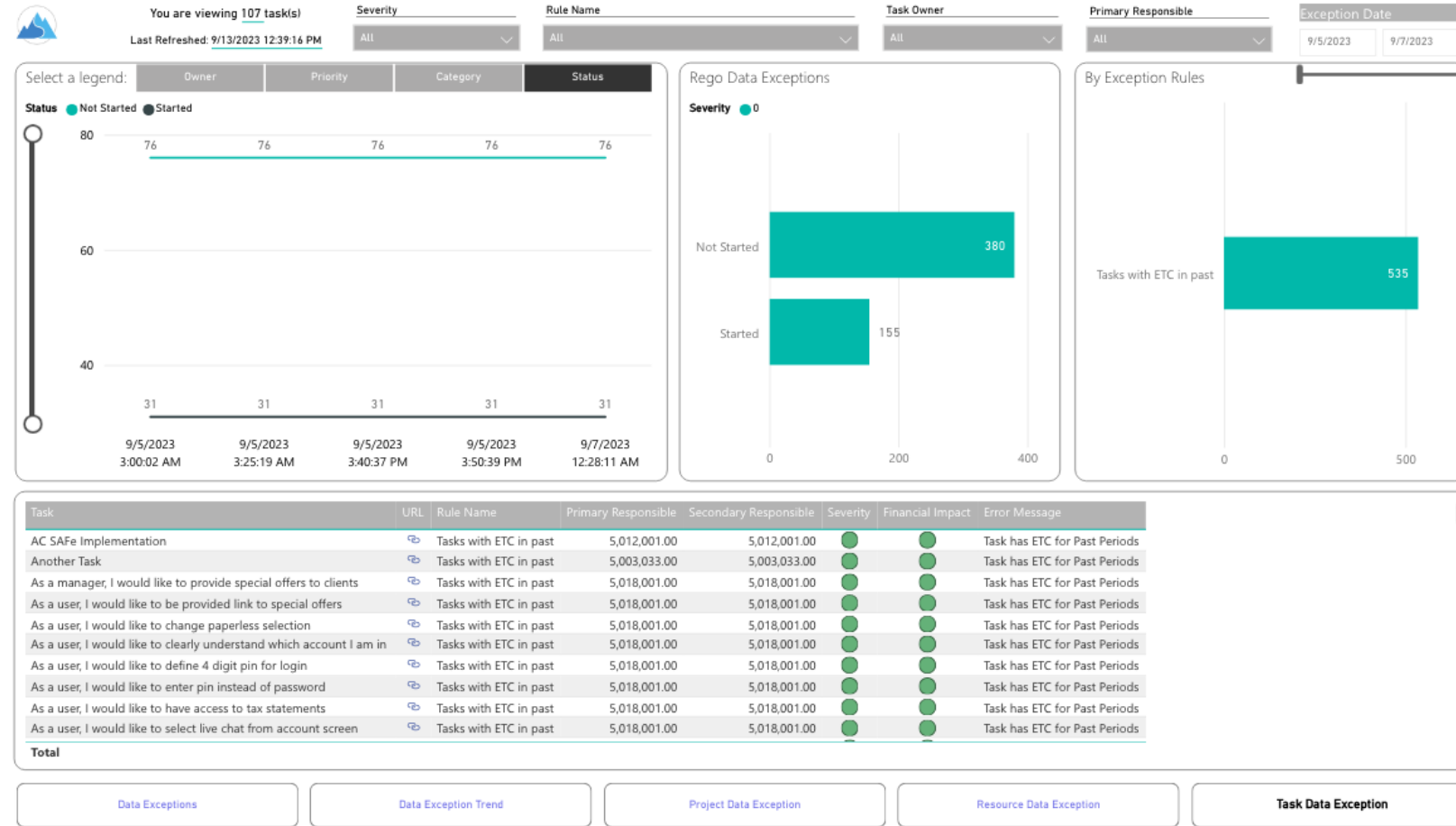
Project Data Exception



Resource Data Exception



Task Data Exception



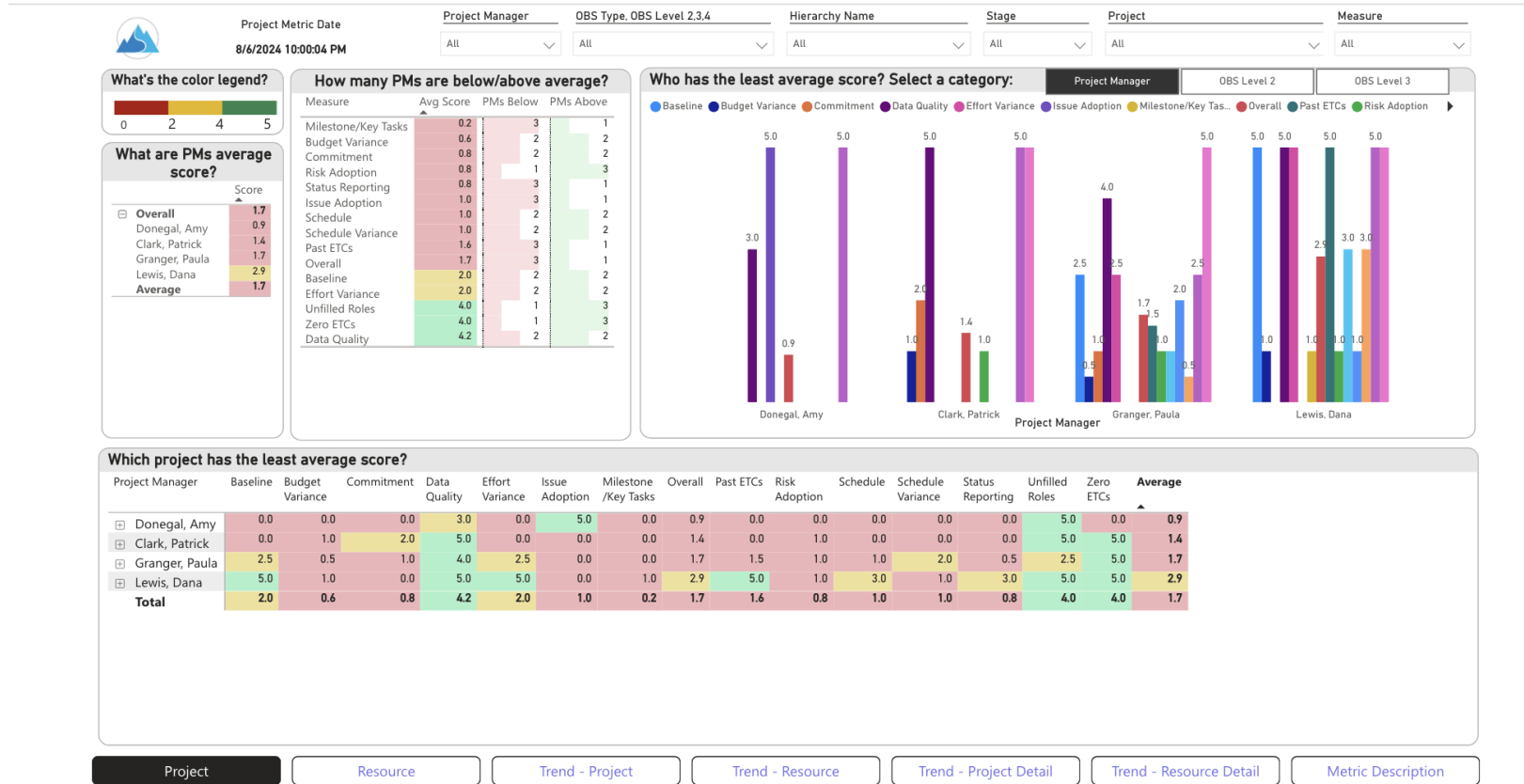
Adoption Metrics



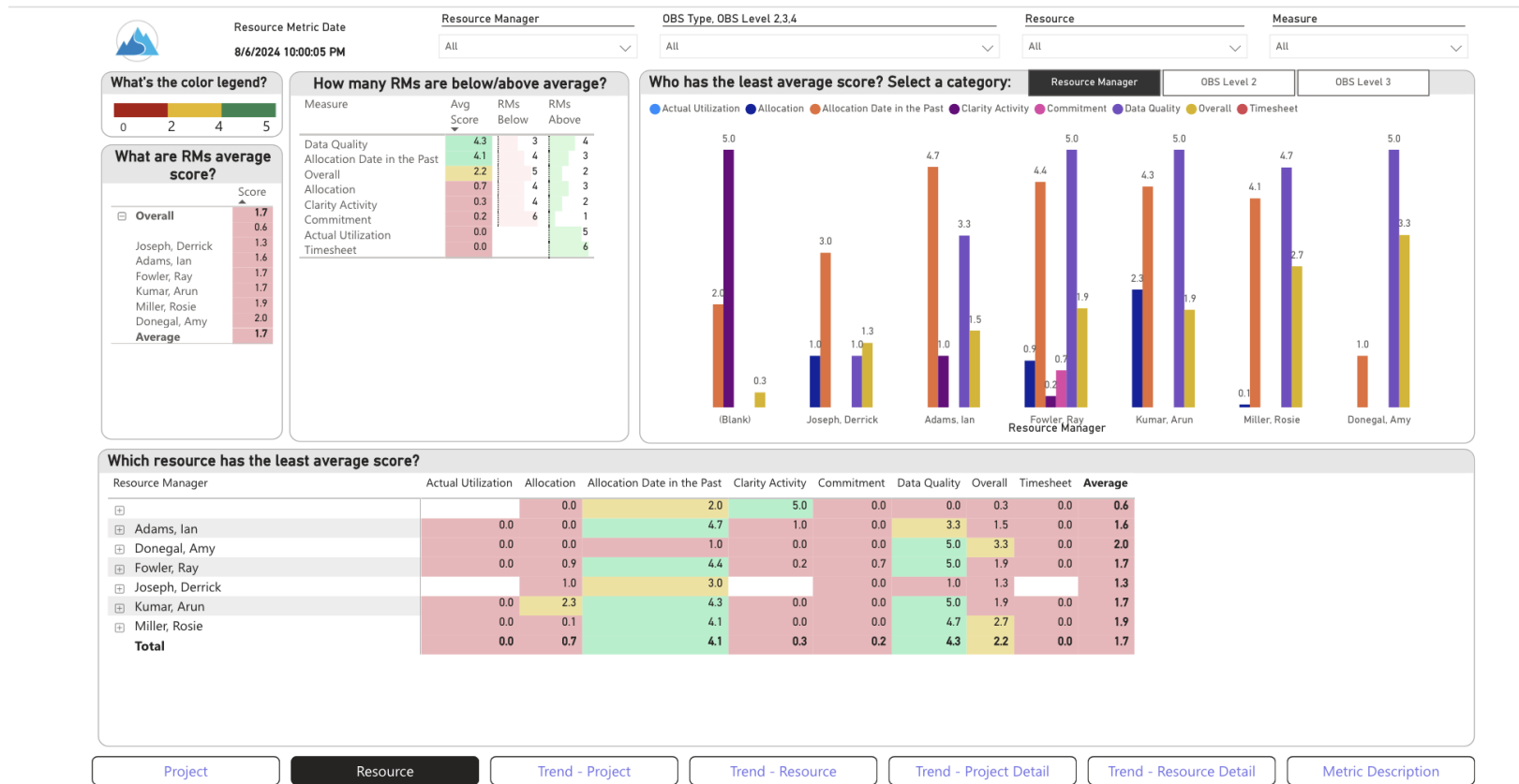
regoUniversity

KANSAS CITY • 2024

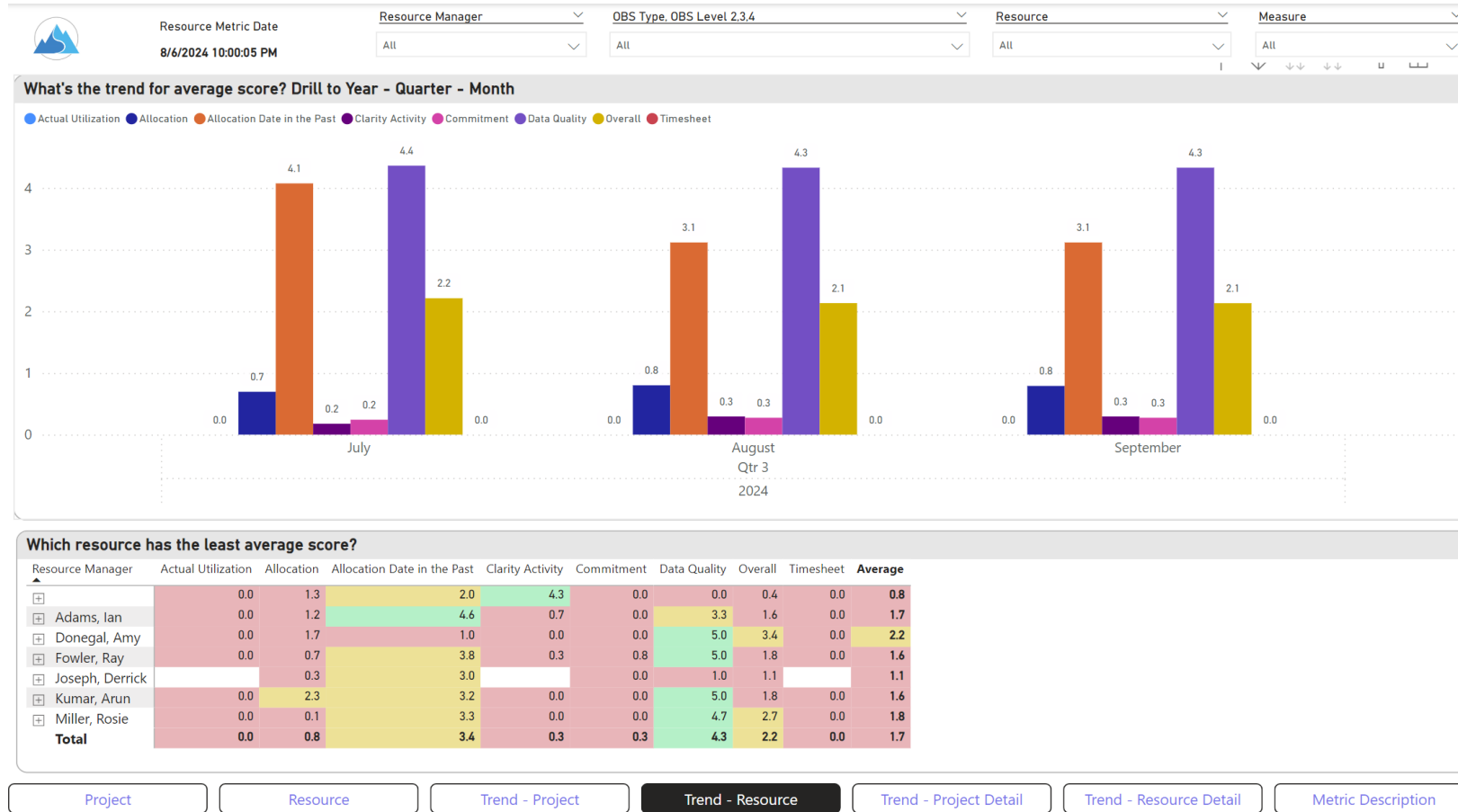
Project Metrics



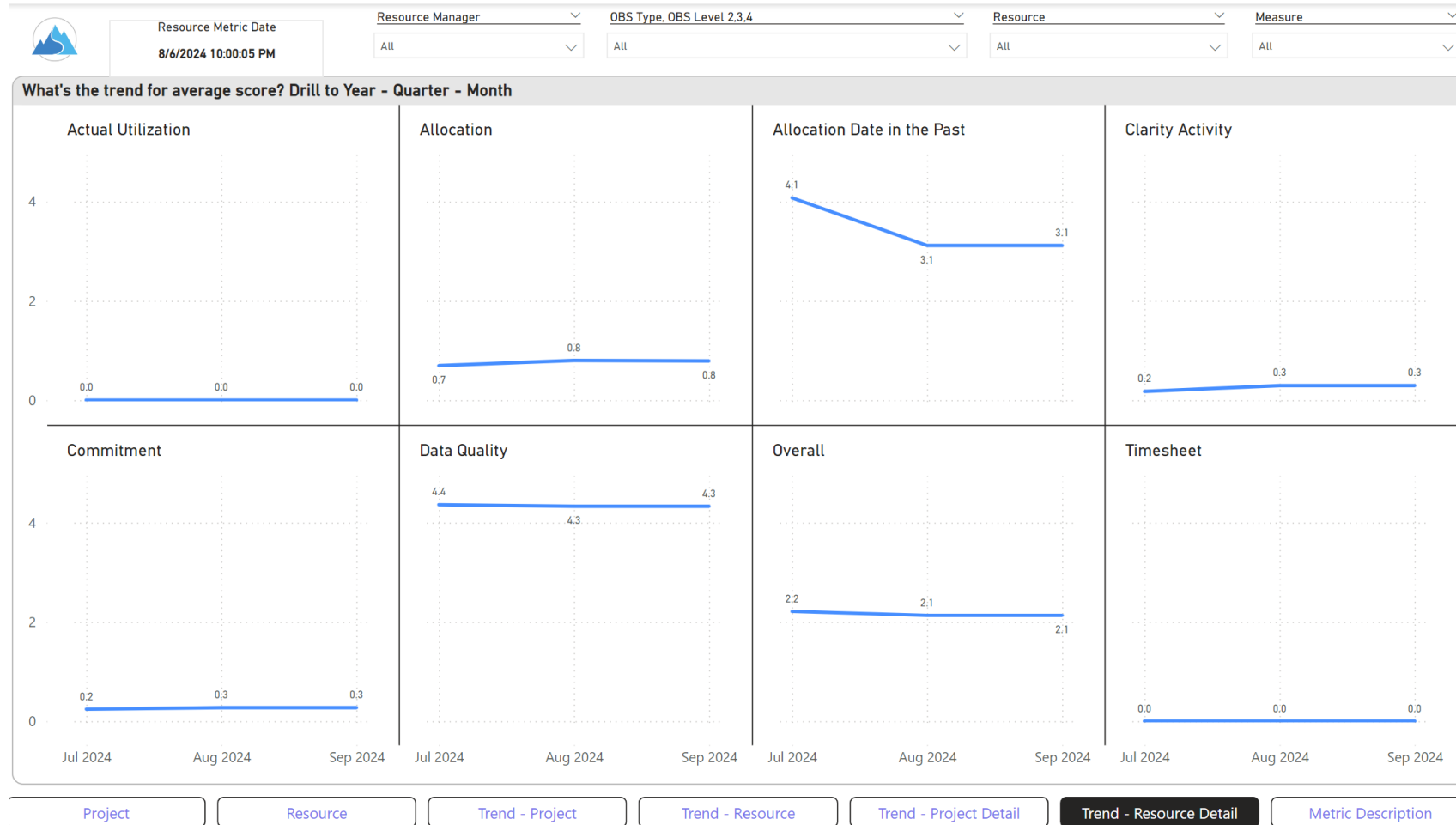
Resource Metrics



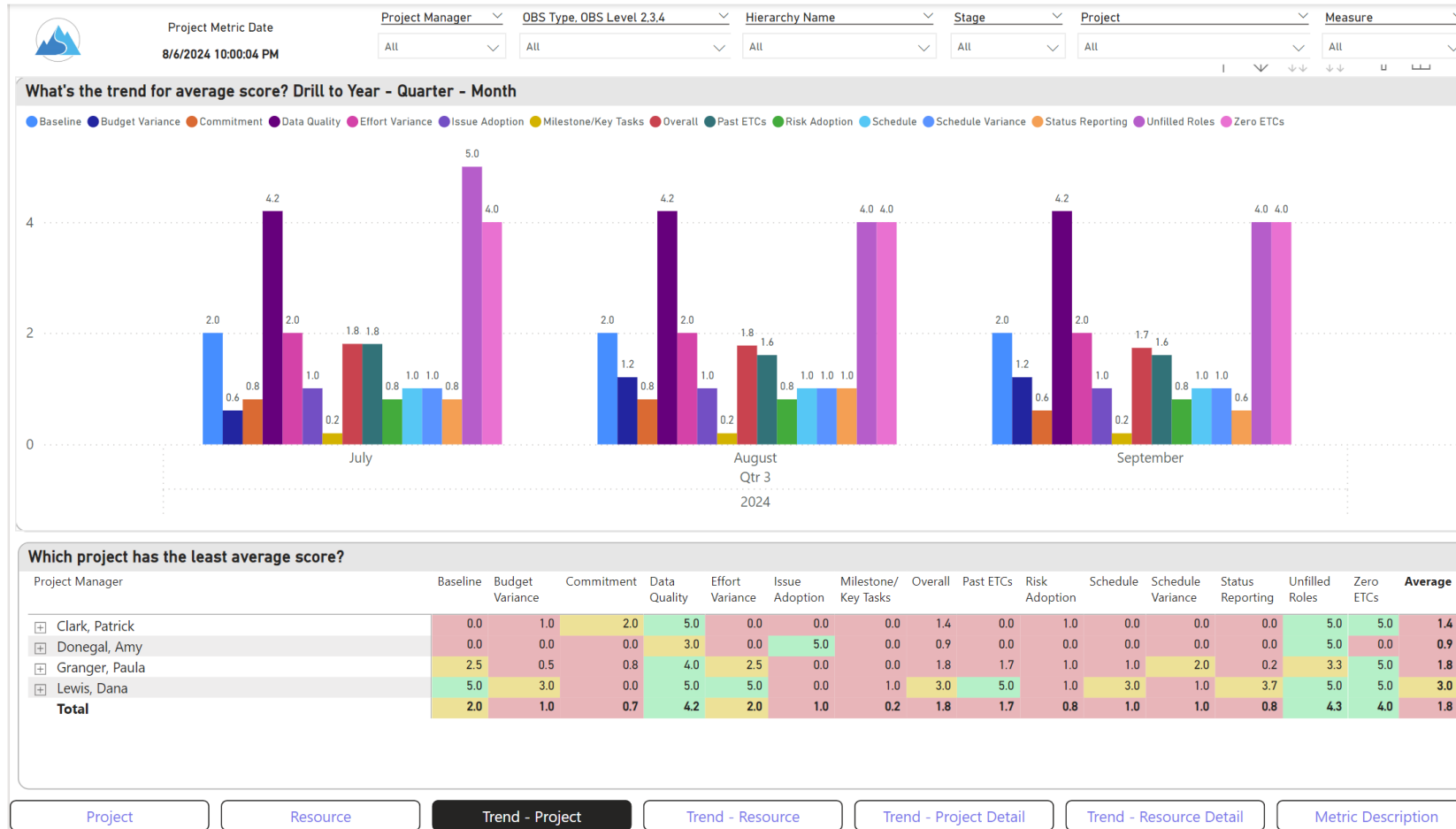
Resource Trends



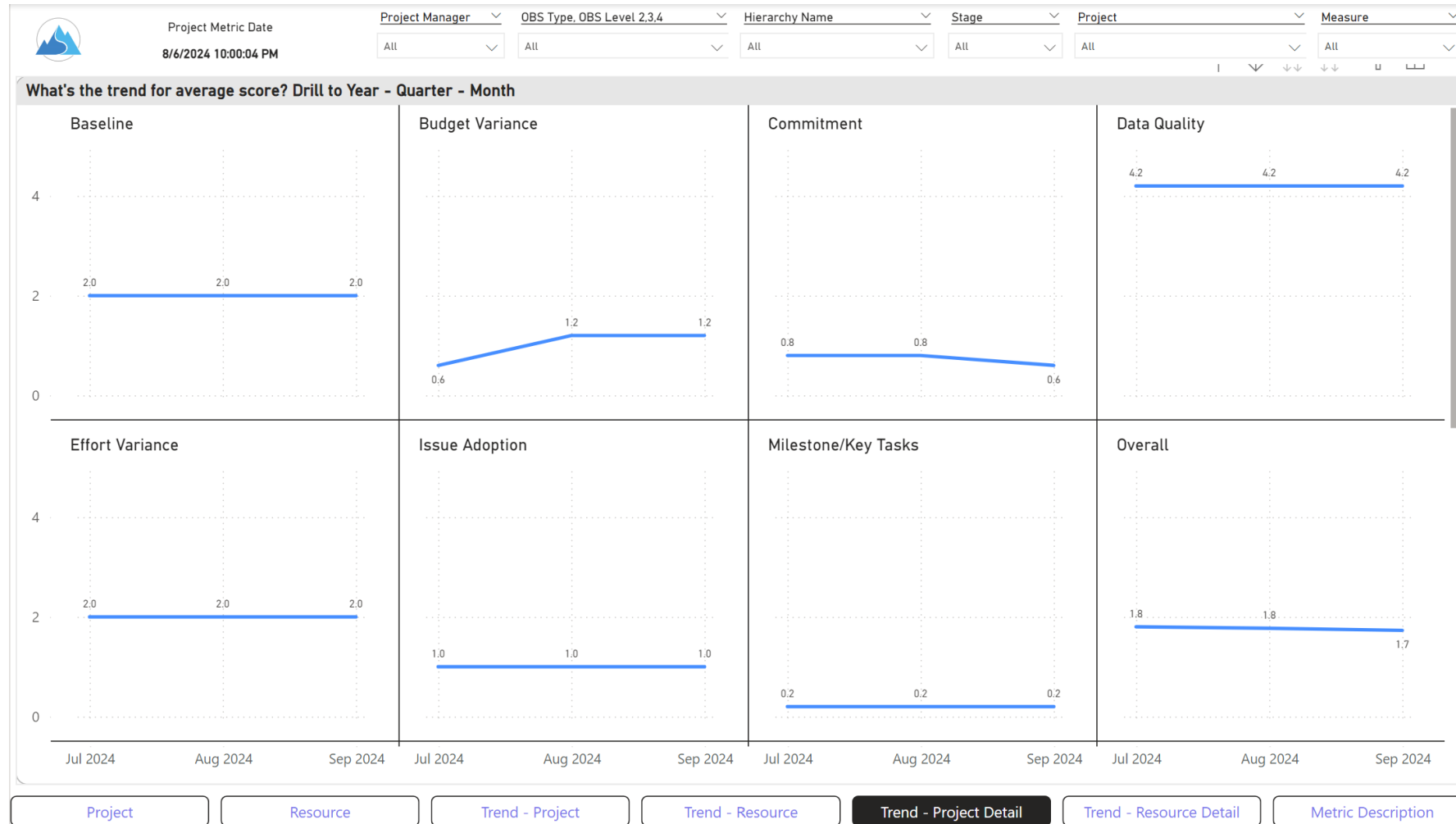
Resource Trend Detail



Project Trends



Project Trend Detail



Metric Definition

Project Metrics

Project Baseline	Do any baselines exist on the project?
Project Budget Variance	Is the budget (or cost plan) being managed effectively?
Project Commitment Metric	Provides a measurement for Project Hard Allocations over a 2 week timeframe.
Project Data Quality	Has Project Manager completed key fields in the project?
Project Effort Variance	Is project effort being managed effectively (e.g. are the baselined hours)?
Project Issue Adoption	Are Issues being actively managed in the project?
Project Milestone/Key Tasks	Is Project Manager creating Milestones / Key Tasks and managing them?
Project Past ETCs	Does Project Manager have tasks which are improperly scheduled?
Project Risk Adoption	Are Risks being actively managed in the project?
Project Schedule	Is Project Manager creating tasks and keeping the project schedule current?
Project Schedule Variance	Is schedule being managed effectively (e.g., are baselined dates accurate)?
Project Status Reporting	Is Project Manager creating project status report for each reporting period?
Project Zero ETCs	Is the Project Manager assigning resources to tasks with Estimates to Complete?
Unfilled Roles Metric	Do projects have roles with allocations that already started or are starting in 30 days?

Resource Metrics

Resource Actual Utilization	Does the Resource allocations match actuals?
Resource Allocation	Is Resource Manager keeping total resource allocations within the expected range?
Resource Allocation Date in the Past	Are resources open for time entry but dates are in the past?
Resource CA PPM Usage	How often users are logging into CA PPM?
Resource Commitment	Provides a measurement for Hard Allocations of the resource over a 4-week time span.
Resource Data Quality	Has Resource Manager completed key fields in the resource record?
Resource Timesheet	Are timesheets getting posted in a timely manner?

[Project](#)[Resource](#)[Trend - Project](#)[Trend - Resource](#)[Trend - Project Detail](#)[Trend - Resource Detail](#)[Metric Description](#)

Dark Theme



regoUniversity

KANSAS CITY • 2024

Dark Theme

