

Introduction



Agenda

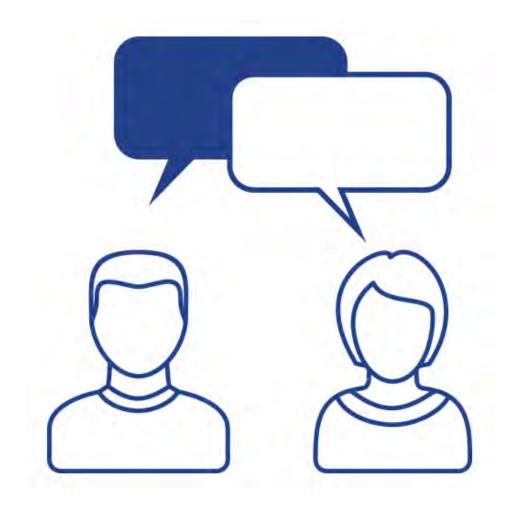
- What is the Rego PowerBI Reporting Suite?
- Where to find the Reporting Suite?
- How to implement and Setup?
- Who owns the reports and Maintenance?
- Do You Need Rego's PowerBI SaaS Service?
- Customization and Flexibility

Introductions

Take 5 Minutes

• Turn to a Person Near You

Introduce Yourself



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?



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



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



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



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



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



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



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

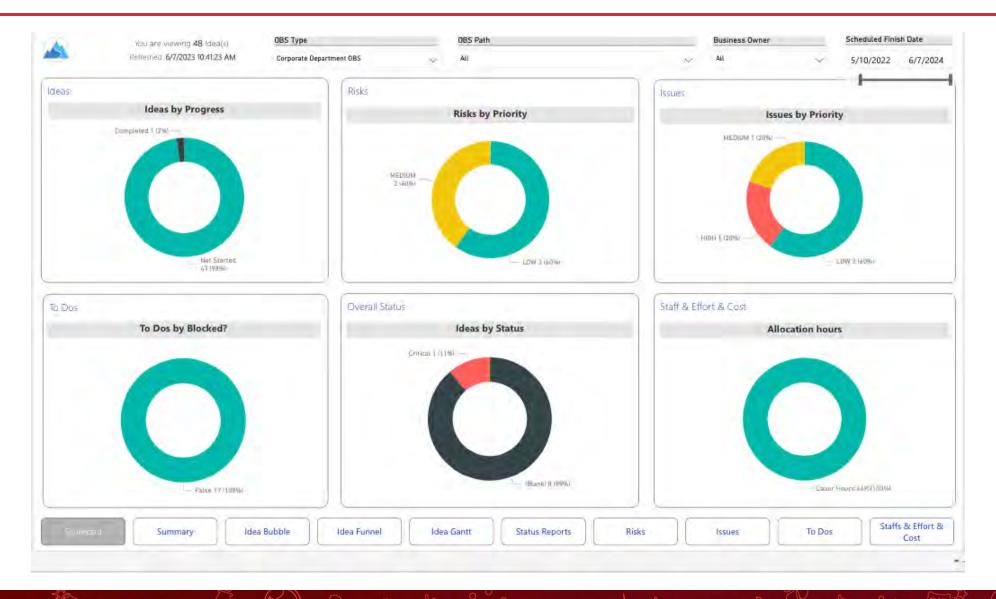
Ideas



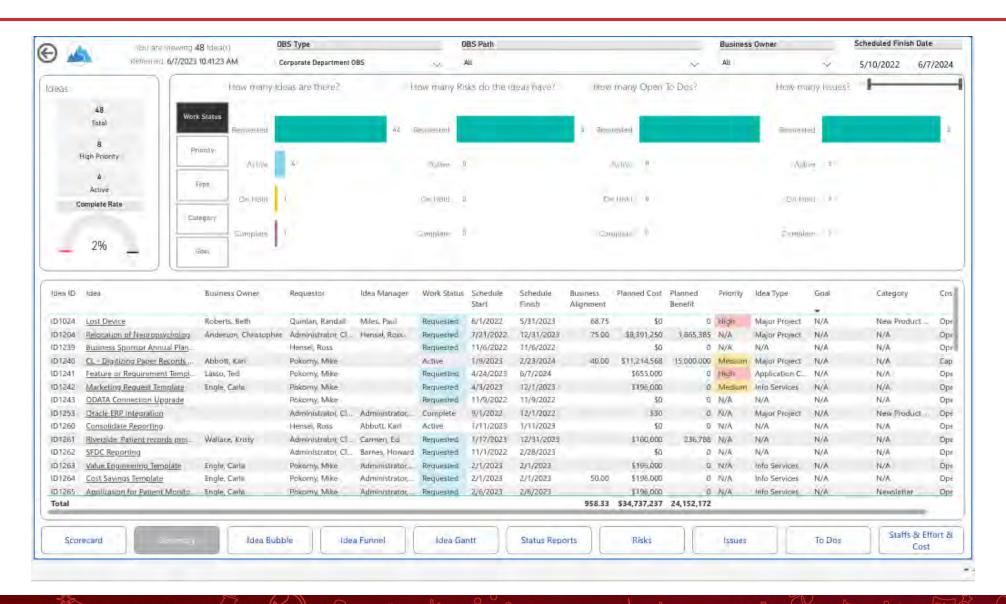
regoUniversity

2025

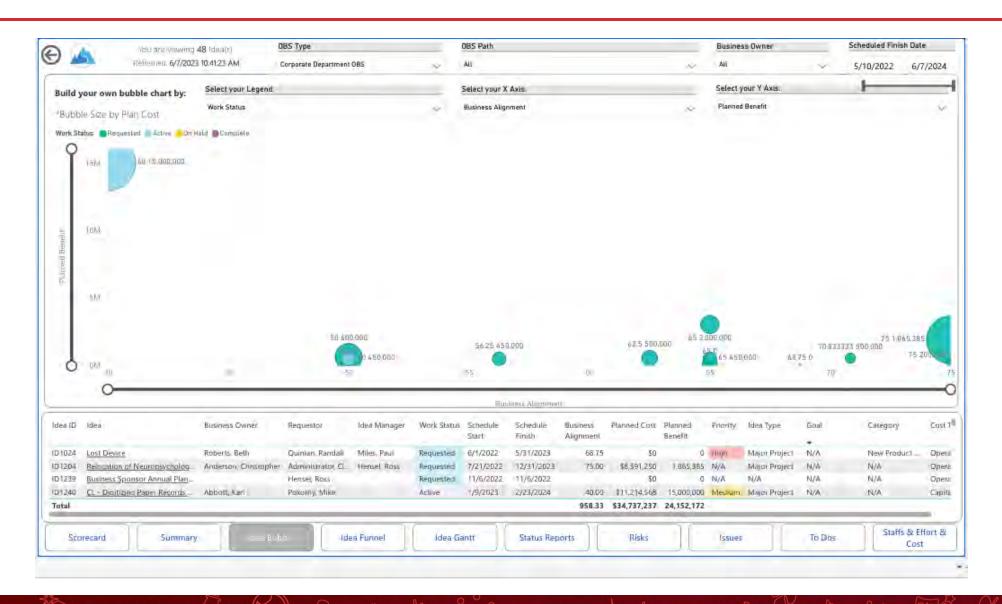
Idea Overview



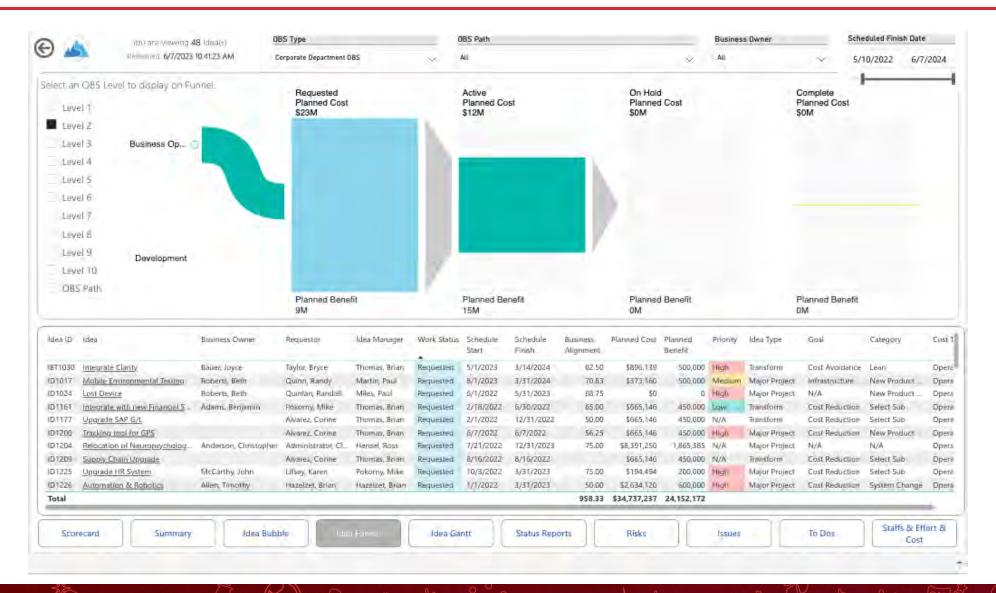
Idea Details



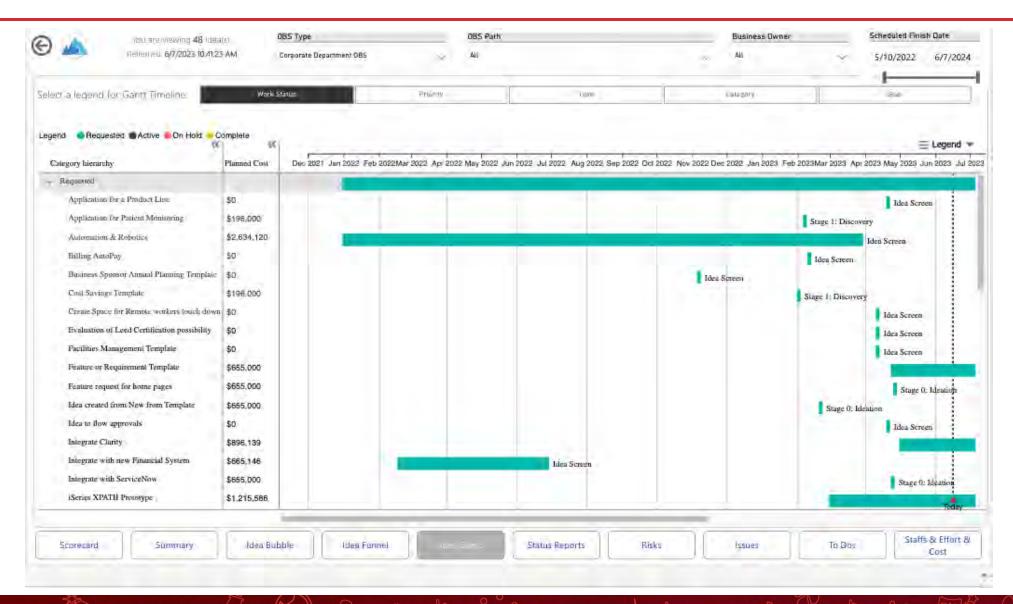
Idea Bubble



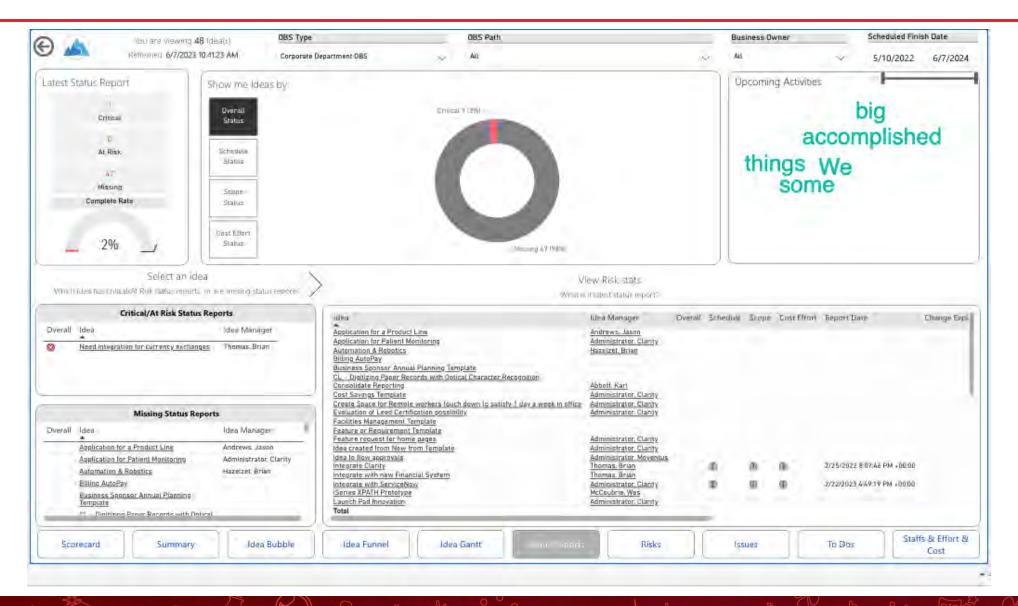
Idea Funnel



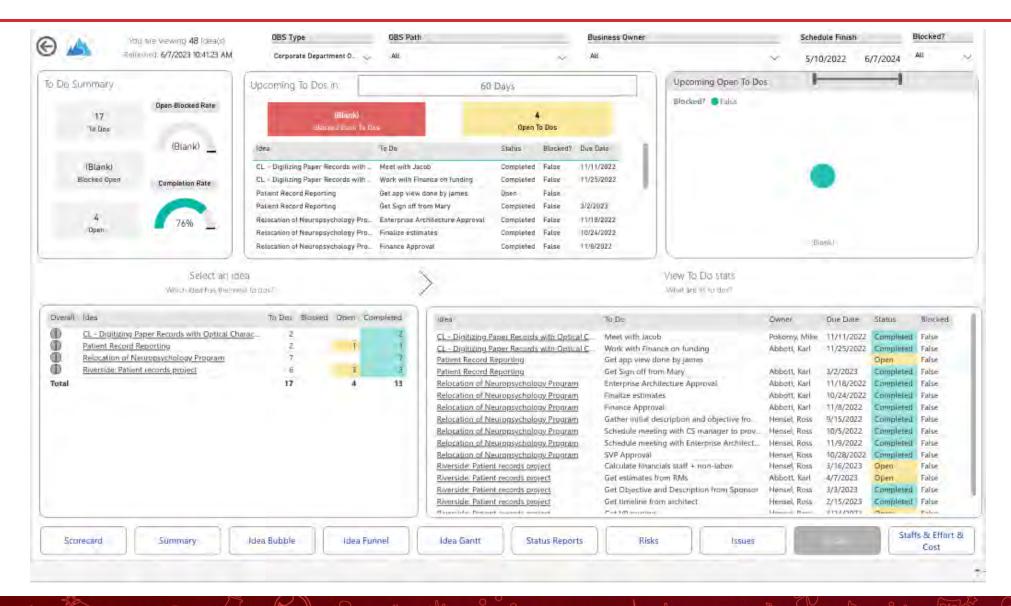
Idea Gant



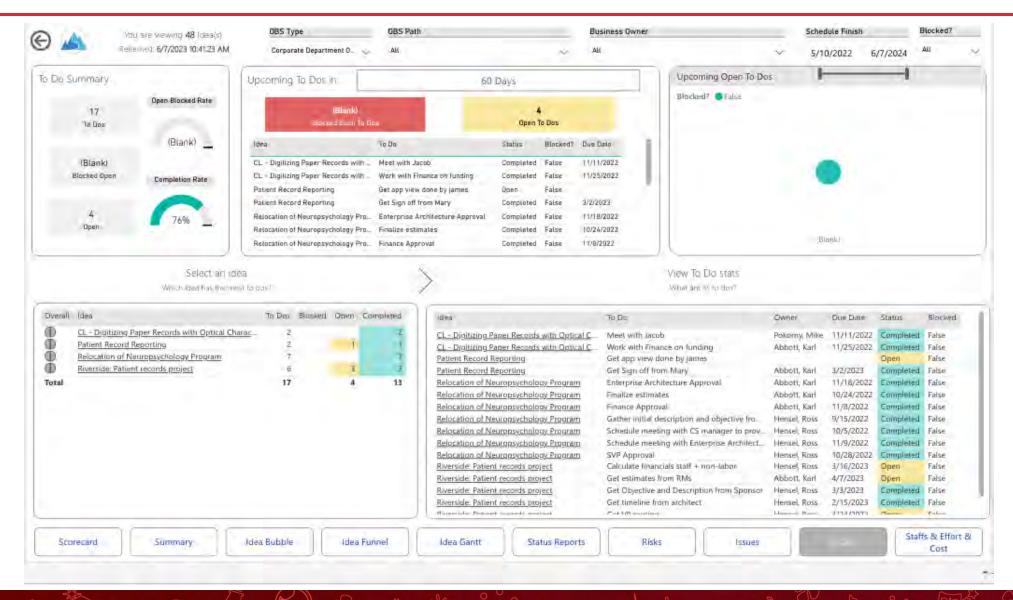
Idea Status



Idea To Do's



Idea Staff and Effort

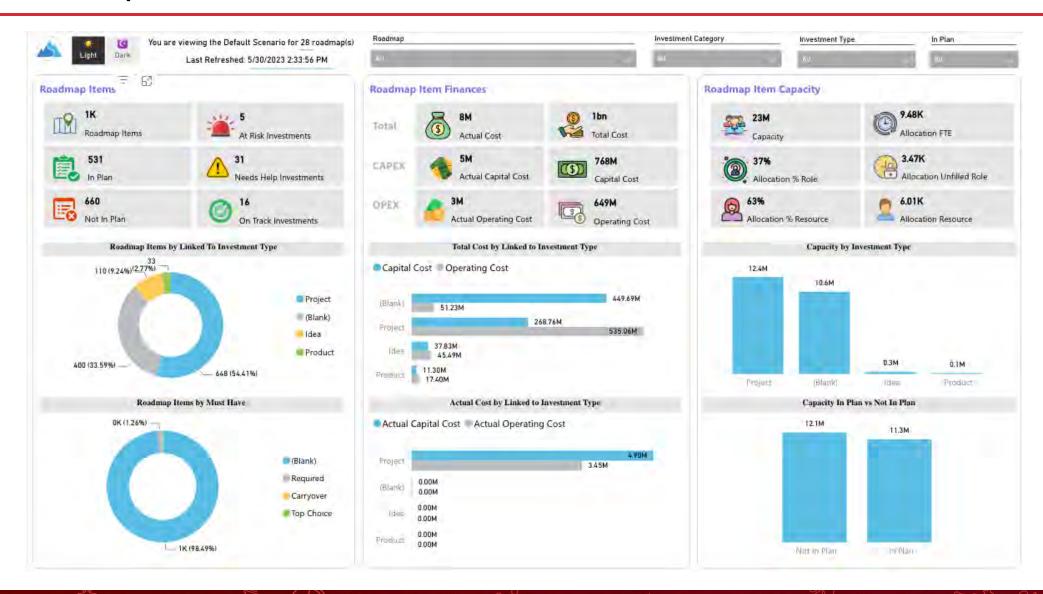


RoadMap

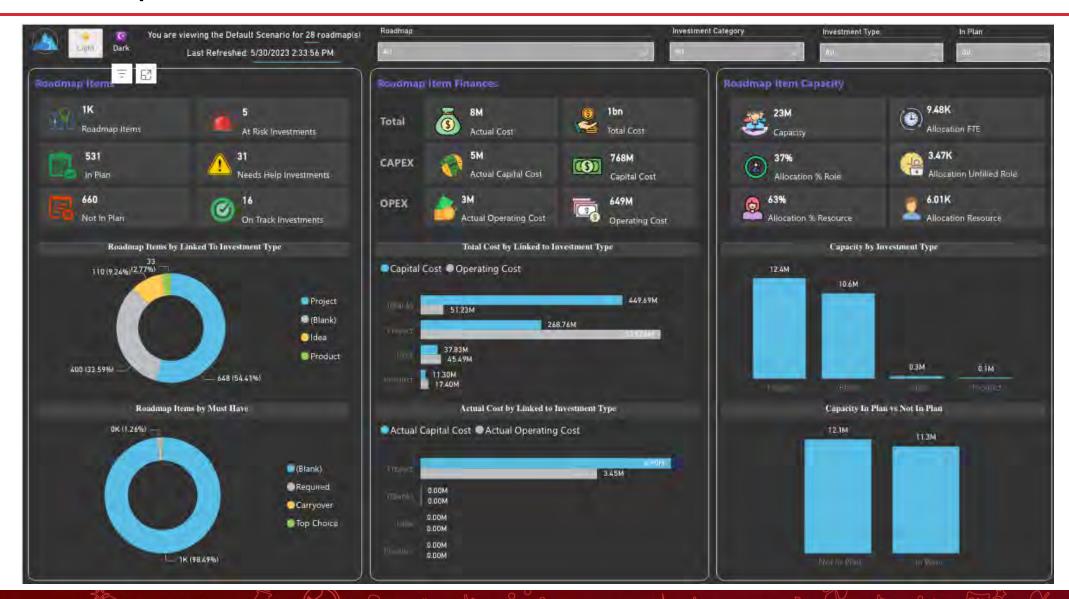




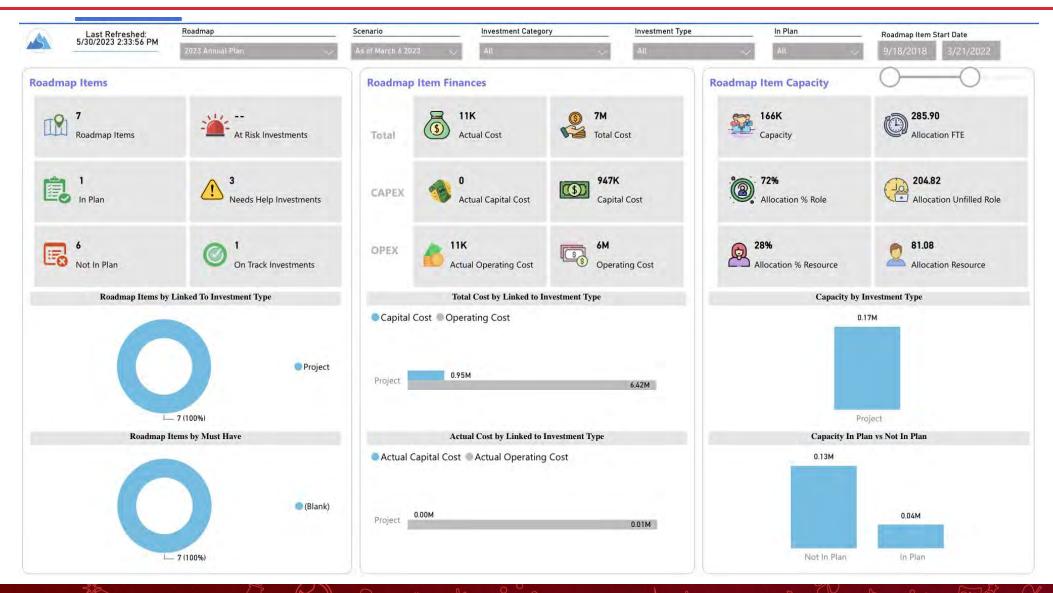
Roadmap Overview – Default Scenarios



Roadmap Overview – Dark Mode



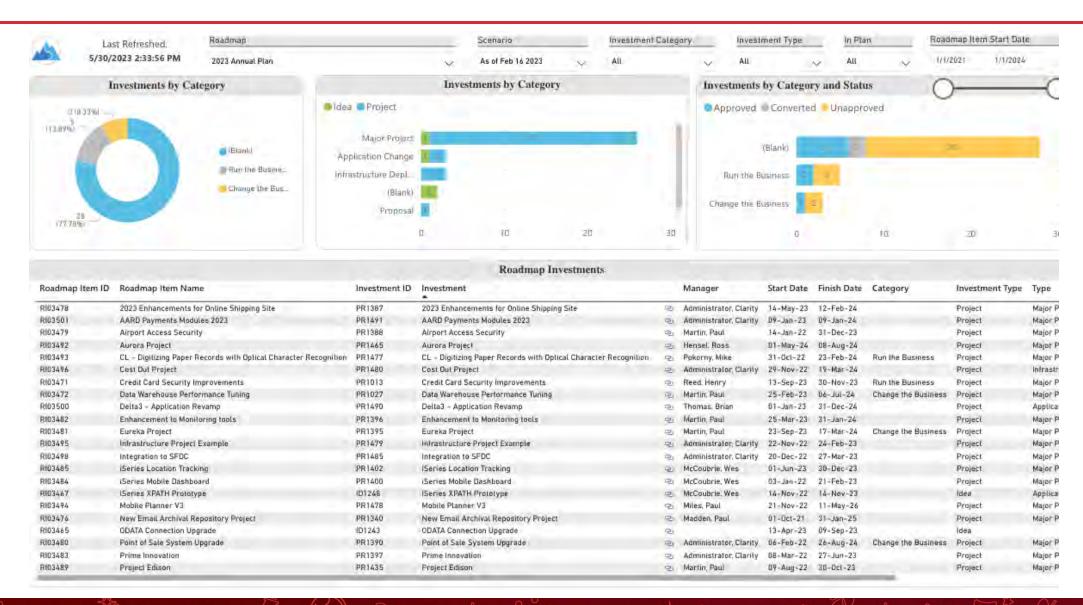
Roadmap Overview – Single Roadmap Selection



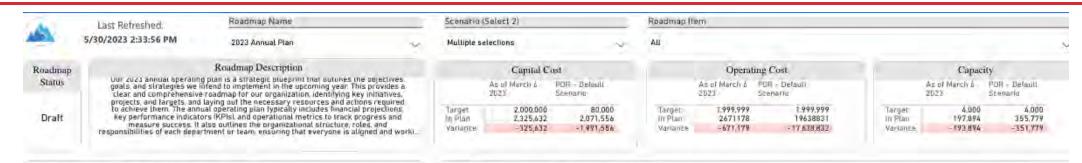
Roadmap Financials



Investment Details



Scenario Comparison



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	on -33,652.00	
Data Warehouse Performance	-504.00	
Eureka Project		-1,256.00
iSeries Location Tracking		-1,461.39
Patient records project	7,370.40	
Riverside: Patient records proje	-7.370.40	
Weather Monitoring Warning systems 2.6		298.55
Total Delta		-29,728.94

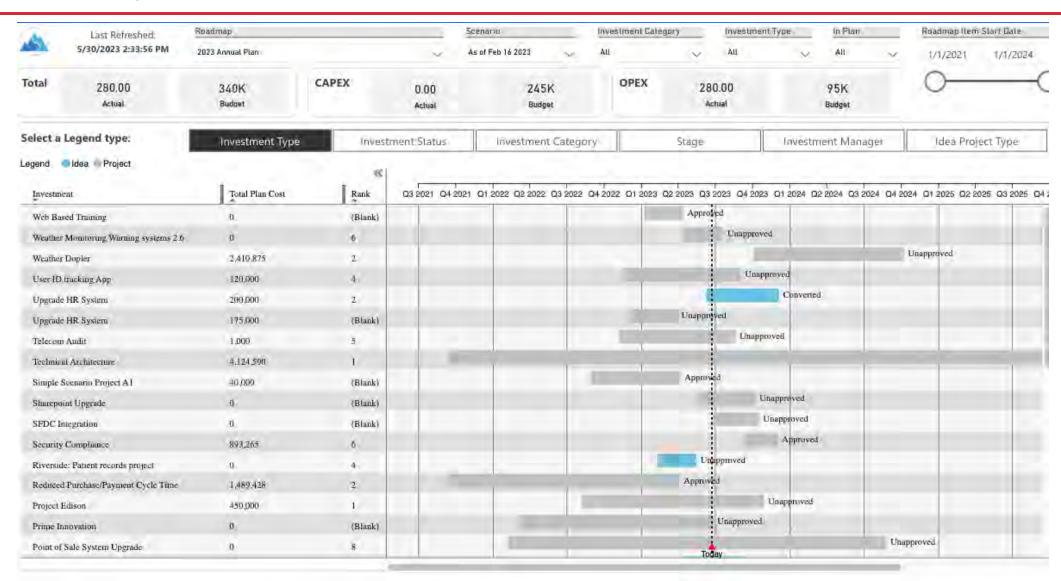
Select to view scenario comparison details:

Dandman Itam Mama

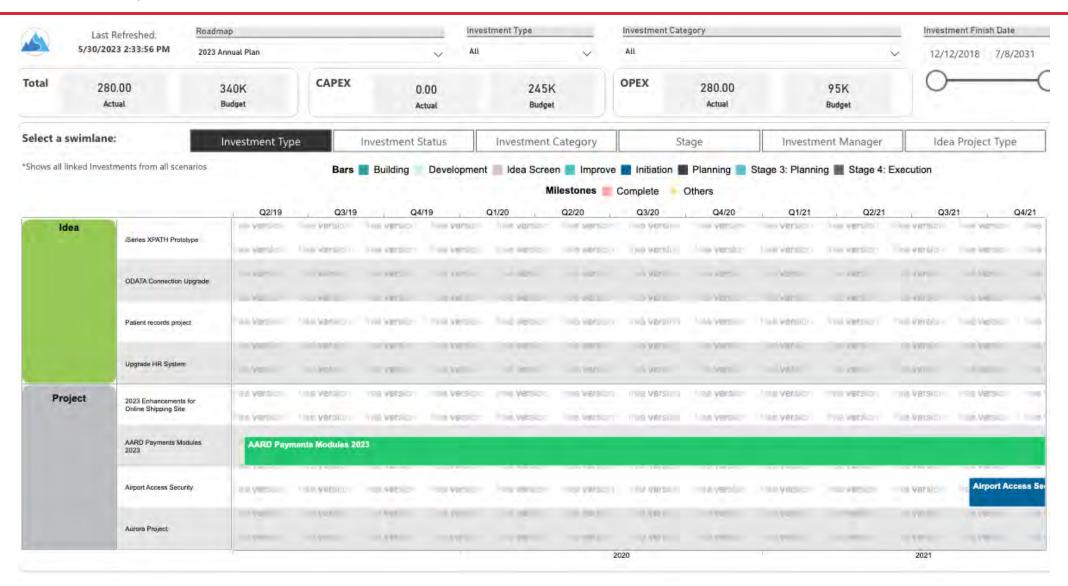
Roadmap Item Name	As of March 6 2023	POR - Default Scenario	Delta
Web Based Training			
Roadmap Item Start Date	6/2/2023	1/9/2023	-144,00
Roadmap Item Finish Date	9/5/2023	4/14/2023	-144.00
CLARITY UPDATED DATE	3/5/2023 9:16:08 PM +00:00	1/18/2023 8:29:50 PM +00:00	
Weather Monitoring Warning systems 2.6	200000000000000000000000000000000000000		
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/B/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 IO 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
In Tilan	Makin Man	to Disco	40.00

Ac of March 4 2022

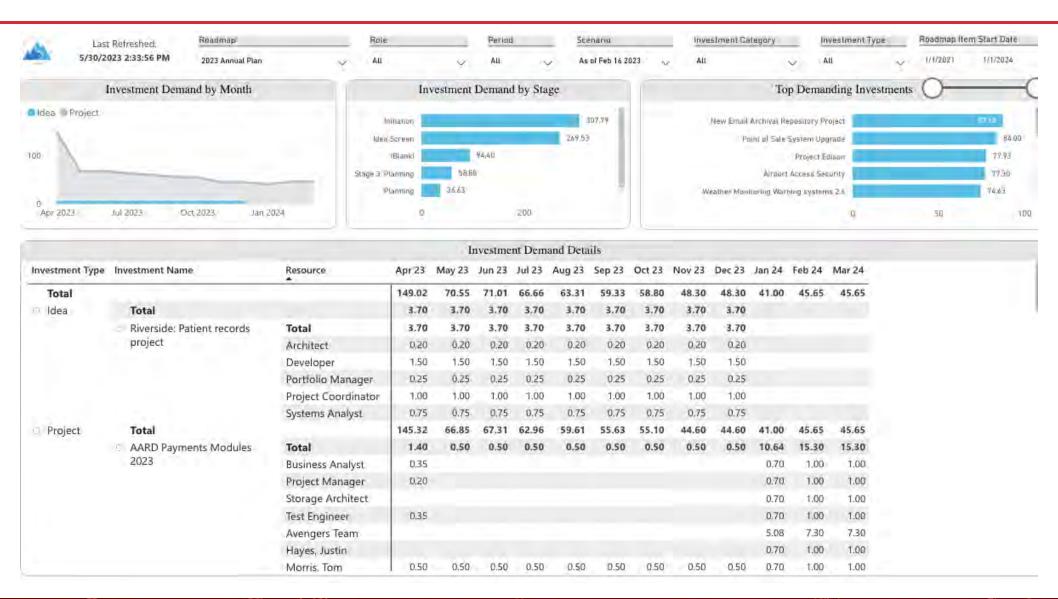
Roadmap Item Gantt



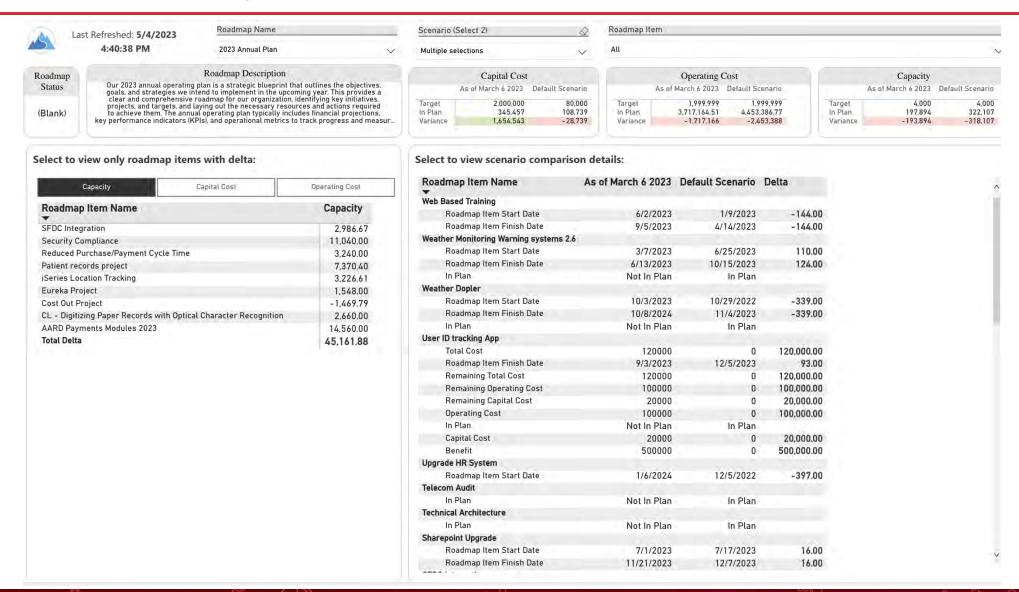
Roadmap Investment Gantt



Resource Investment Demand



Scenario Comparison

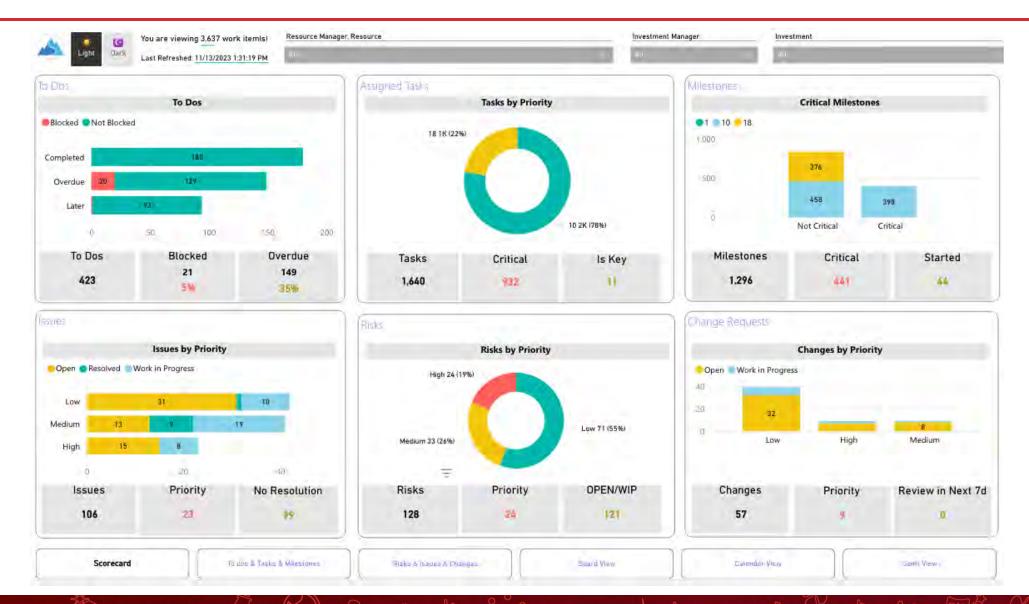


Work Management

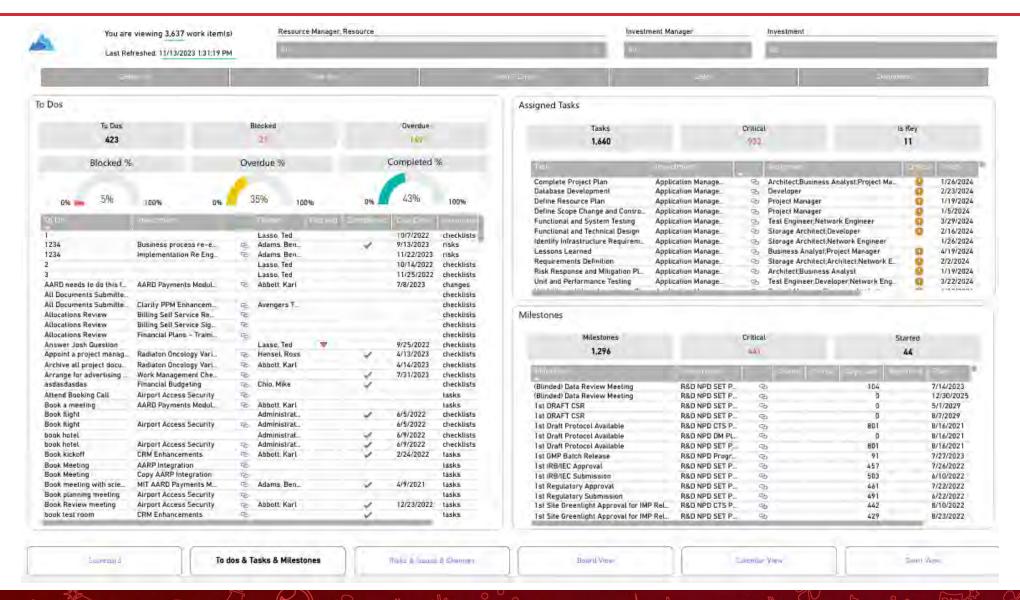




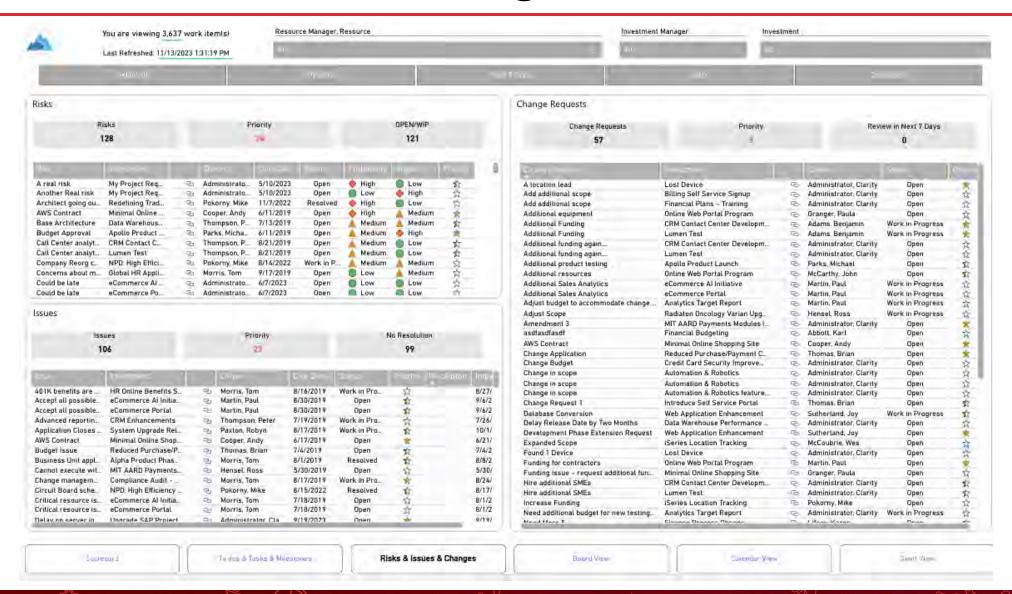
Scorecard



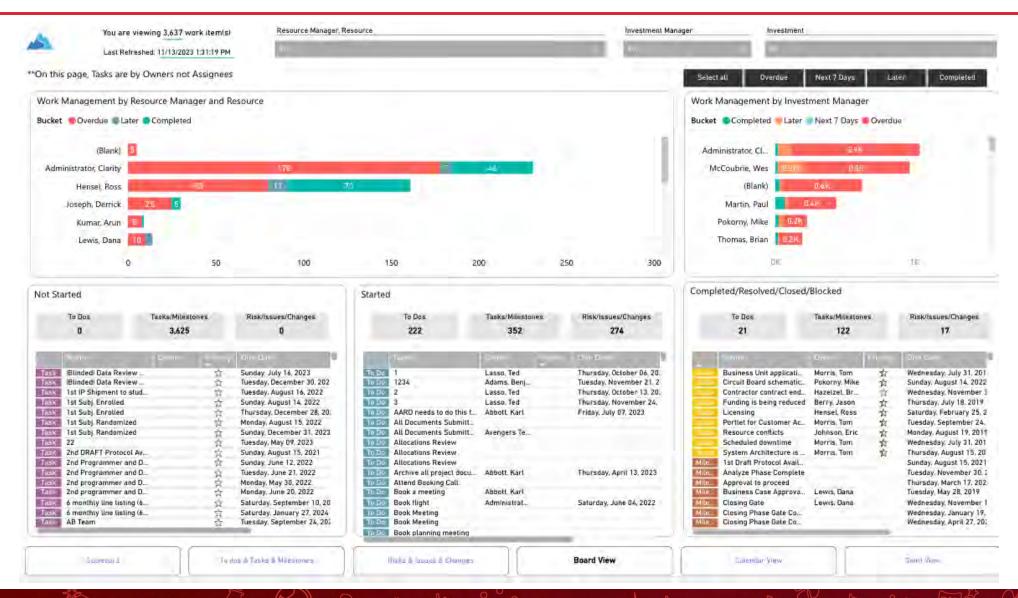
To Do's, Tasks and Milestones



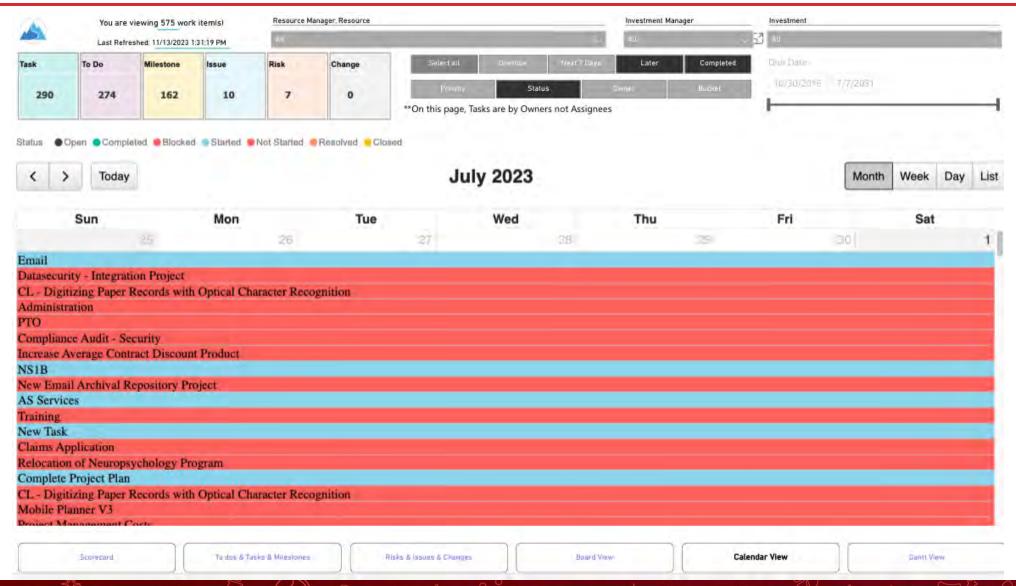
Work Risk Issue and Change



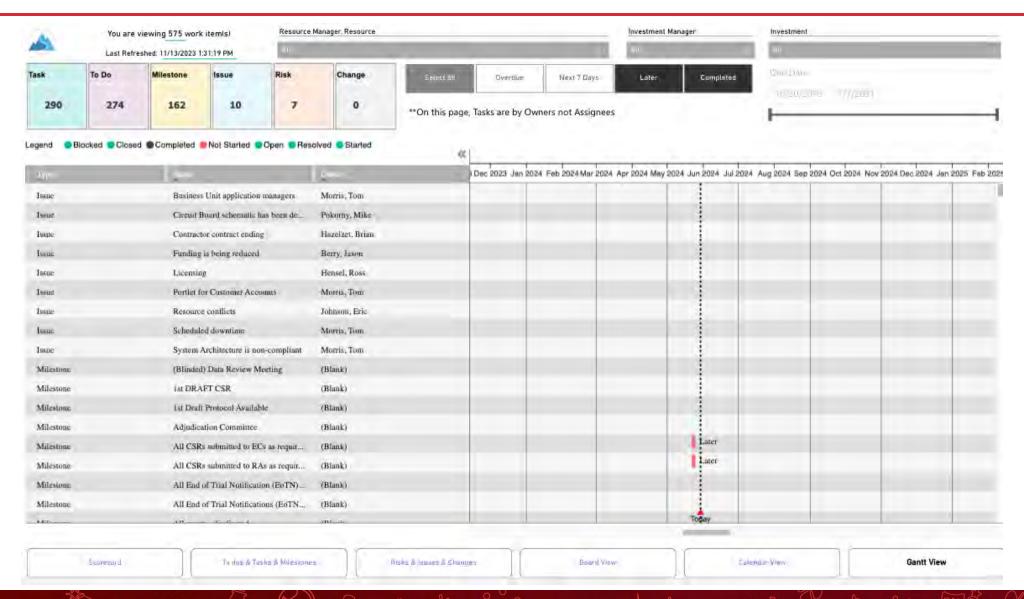
Board View



Calendar View



Gantt View

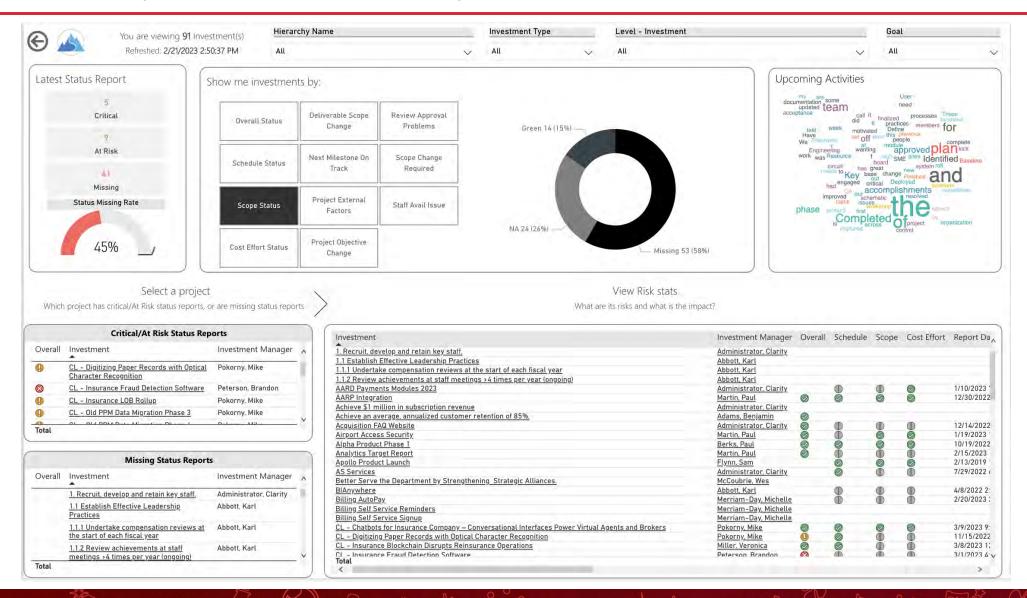


Portfolio

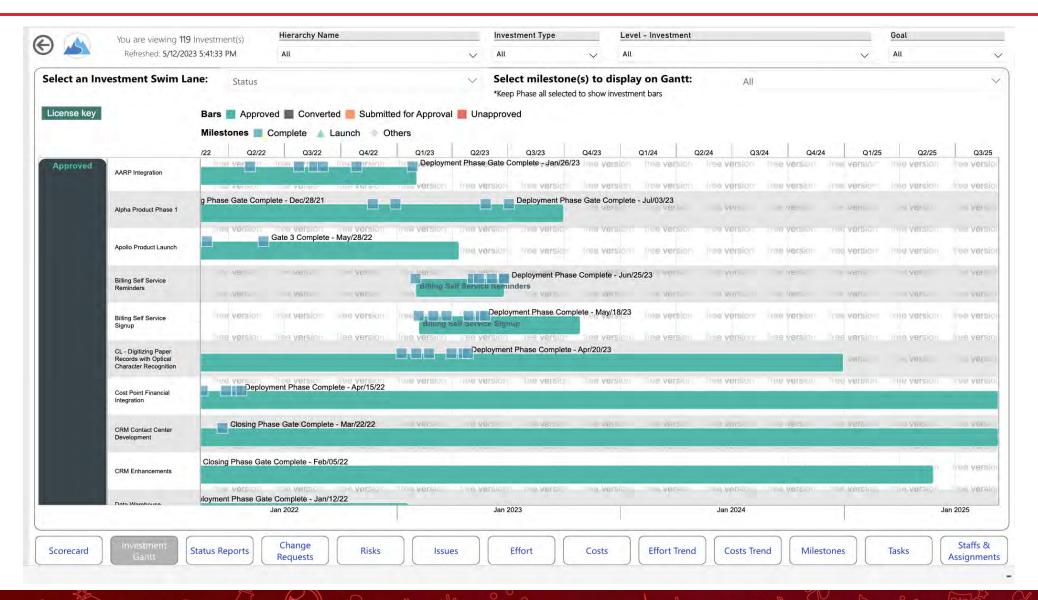
Investments and Hierarchy



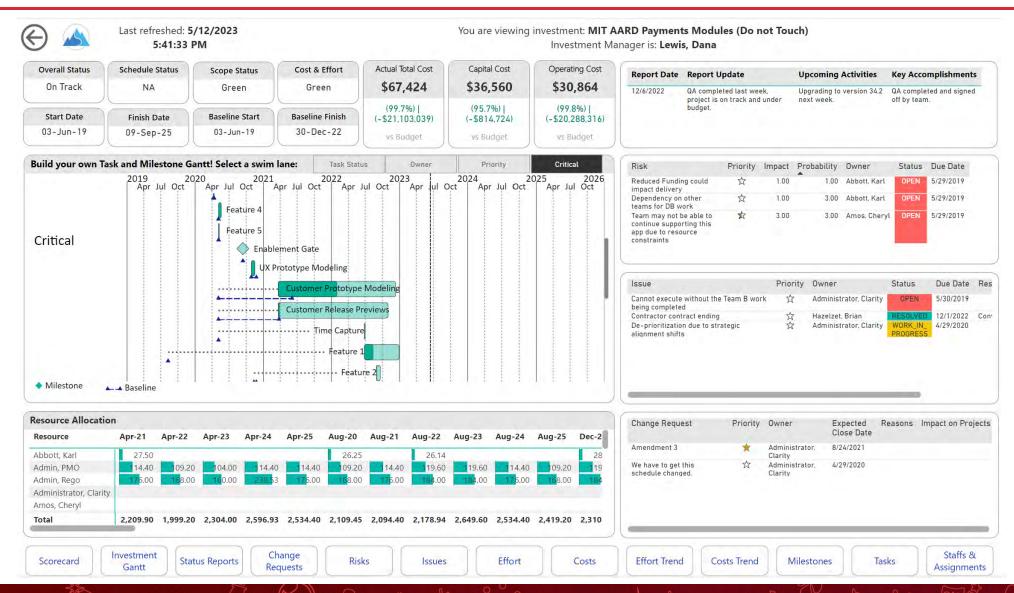
Status Report Summary



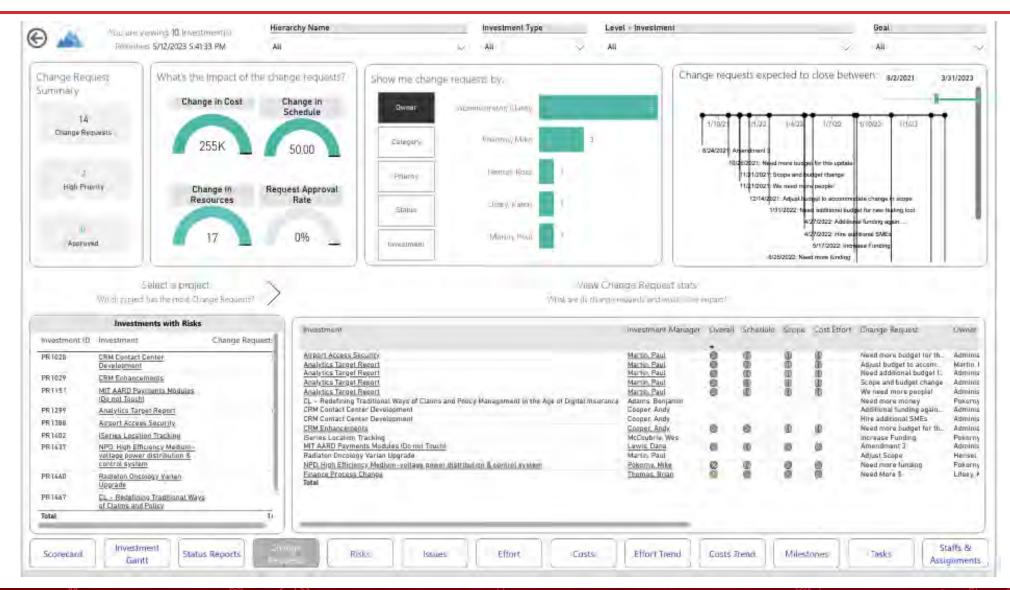
Investment Gant



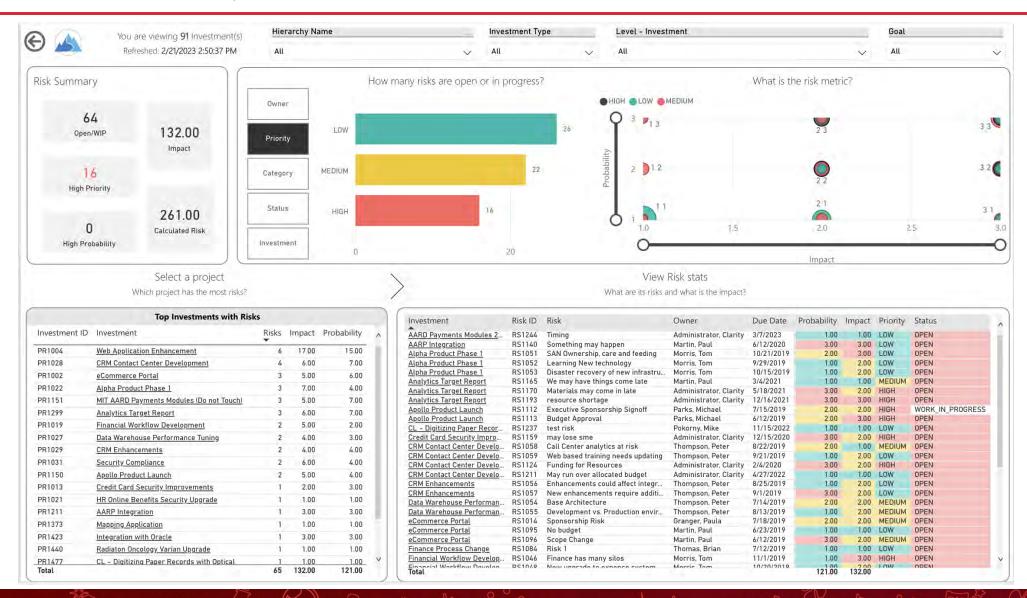
Investment Drill Thru



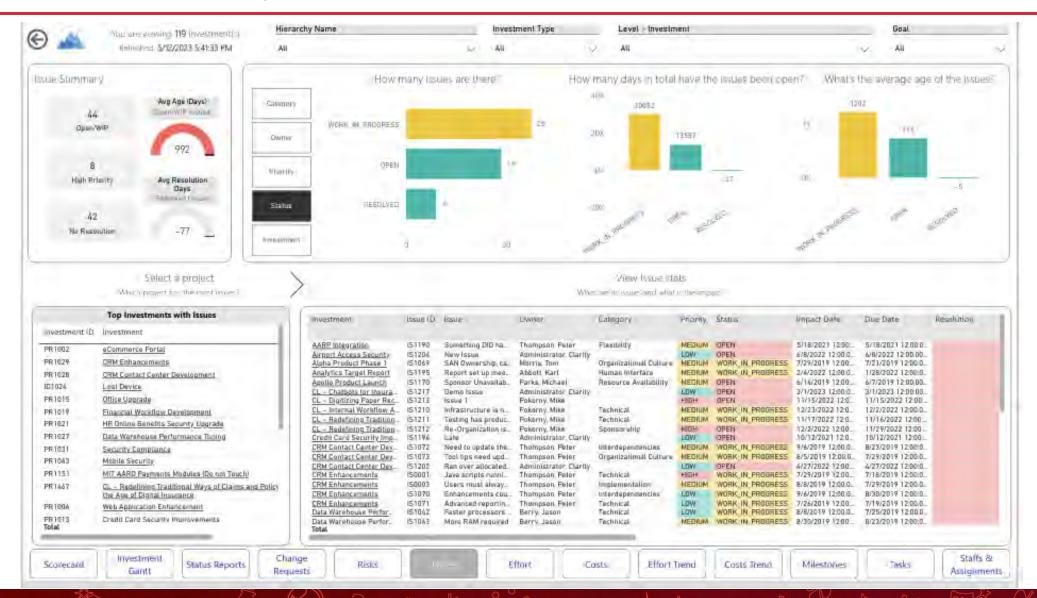
Change Requests



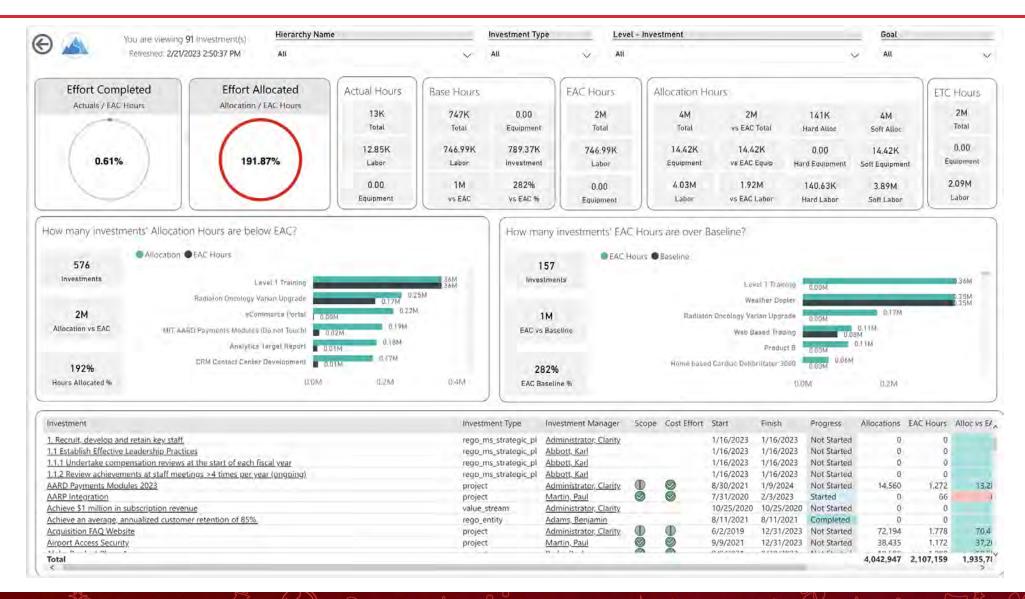
Risk Summary



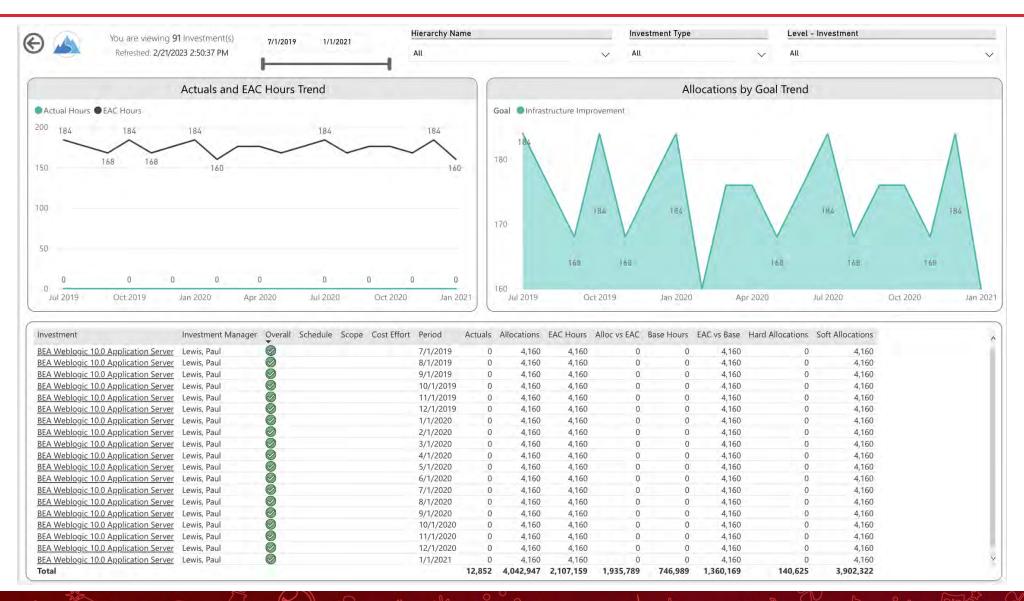
Issue Summary



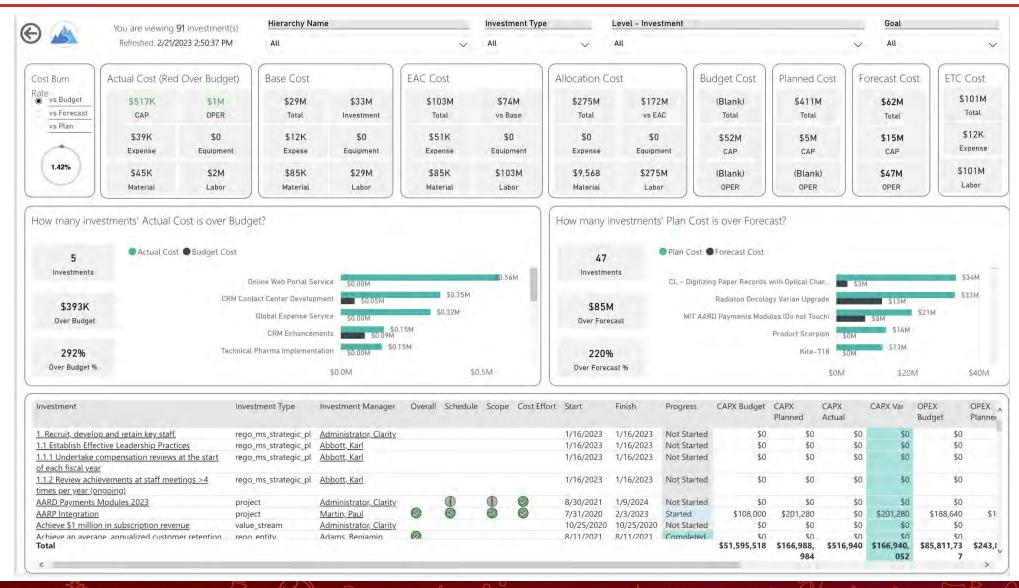
Effort



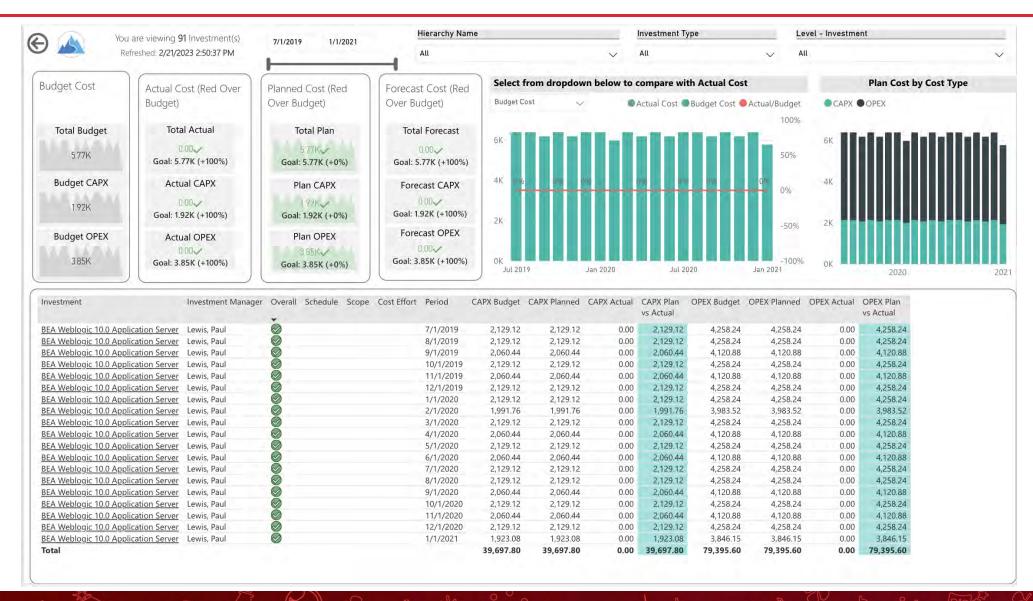
Effort Trend



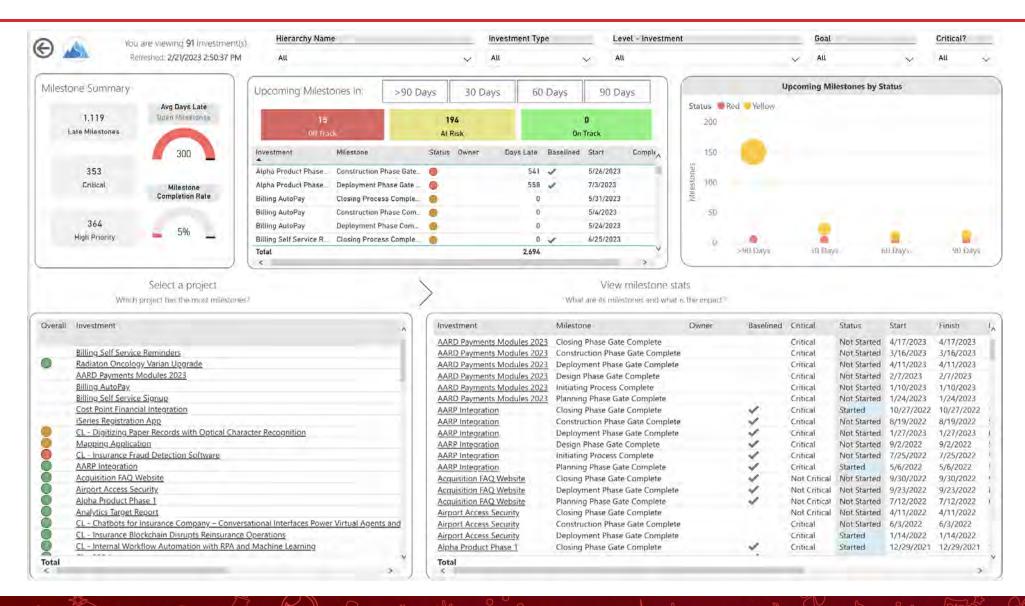
Cost



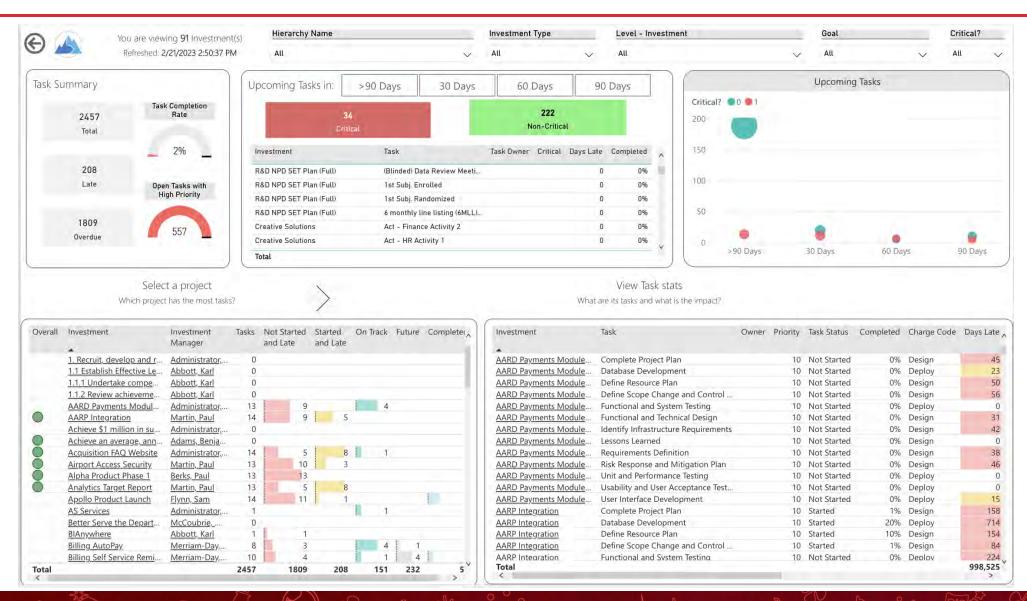
Cost Trend



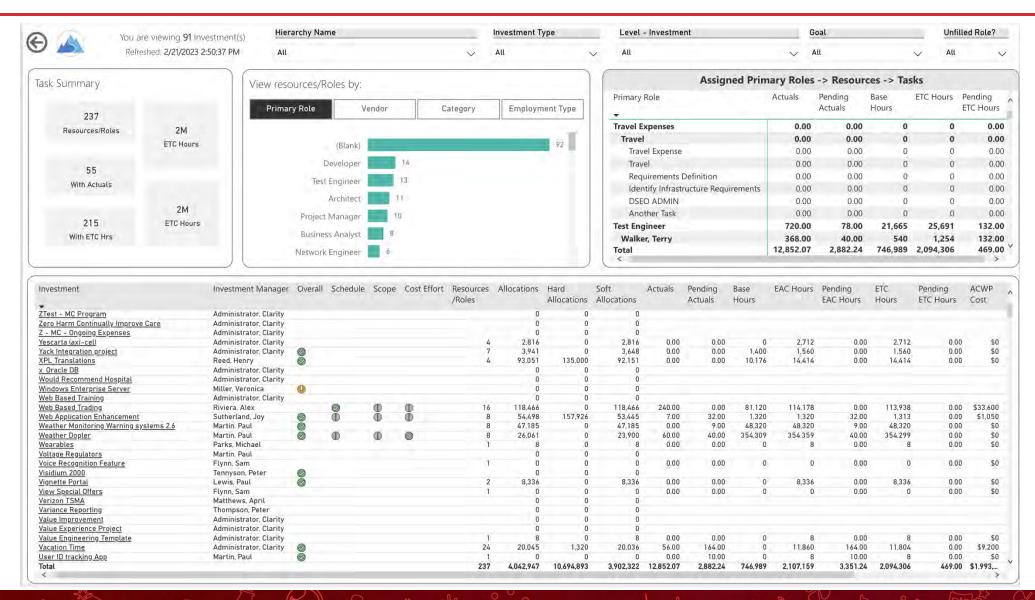
Milestones



Tasks



Staff

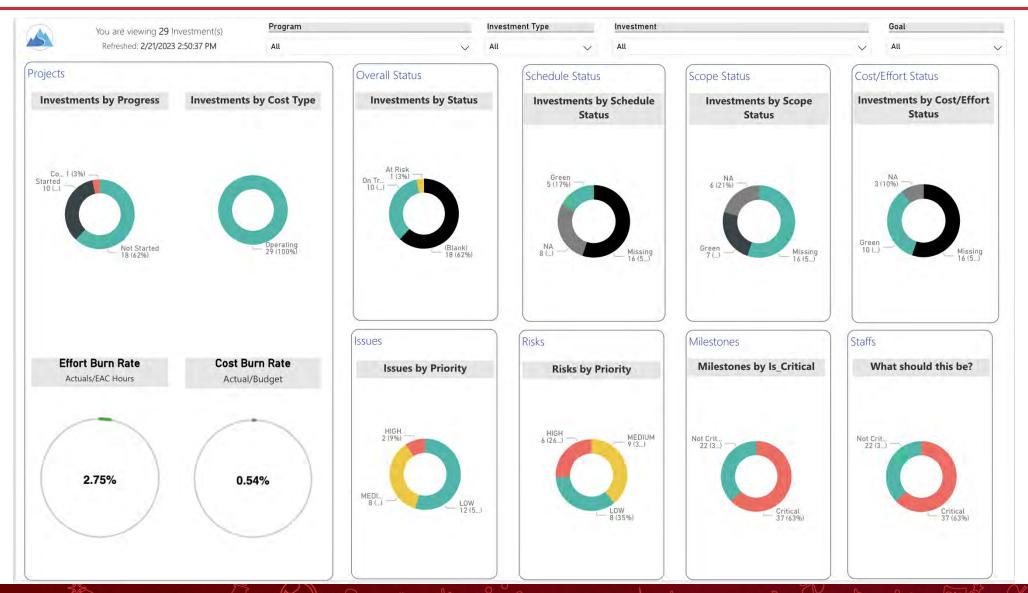


Program

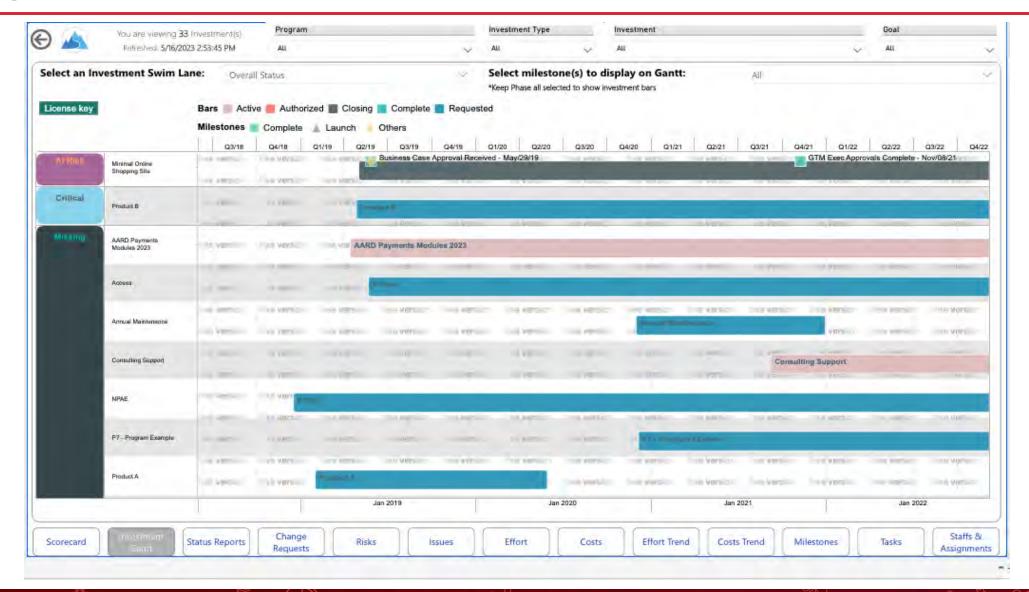




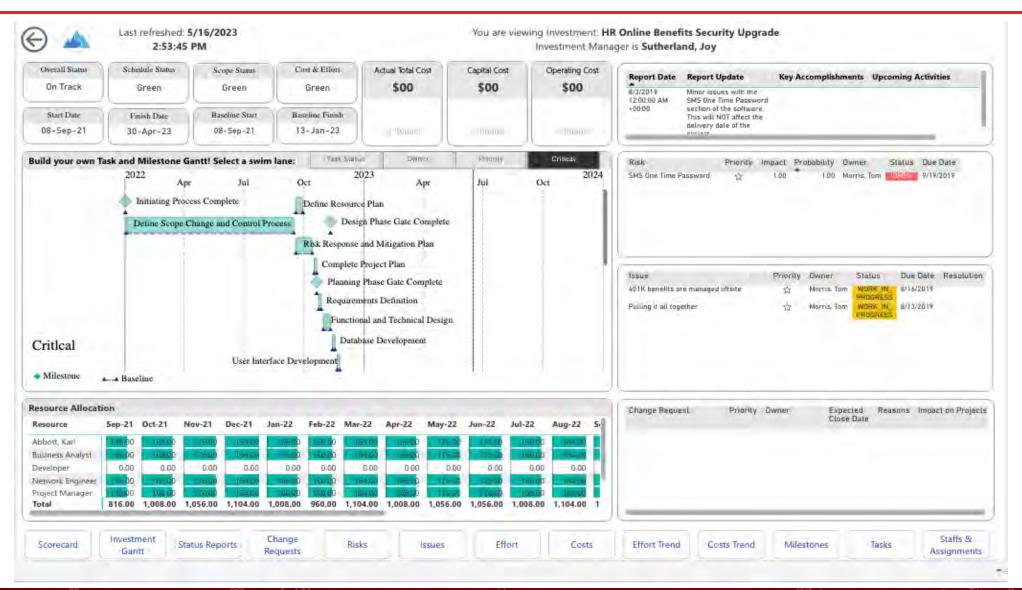
Program Summary



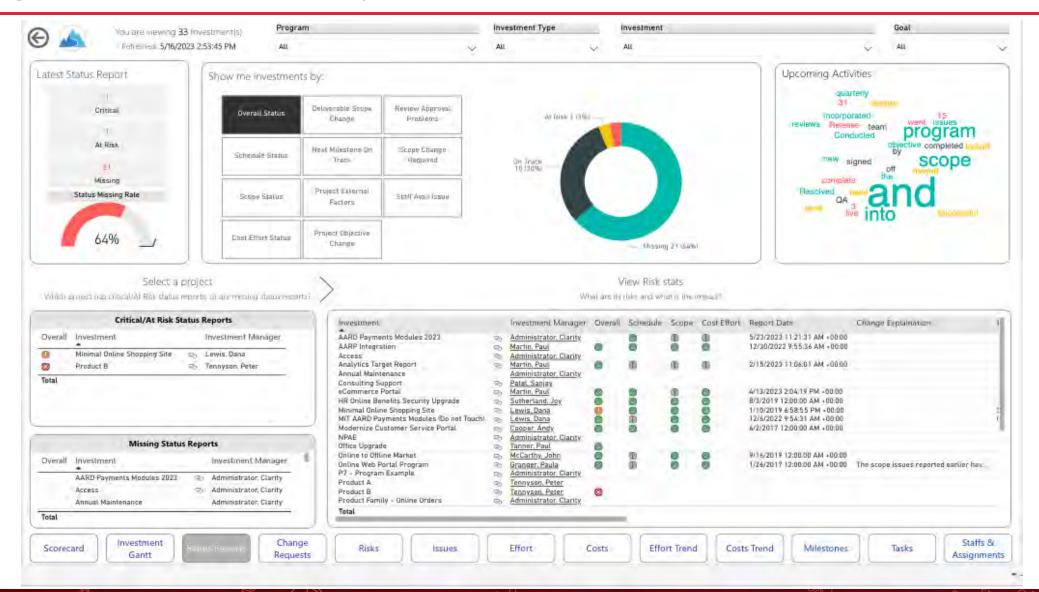
Program Gant



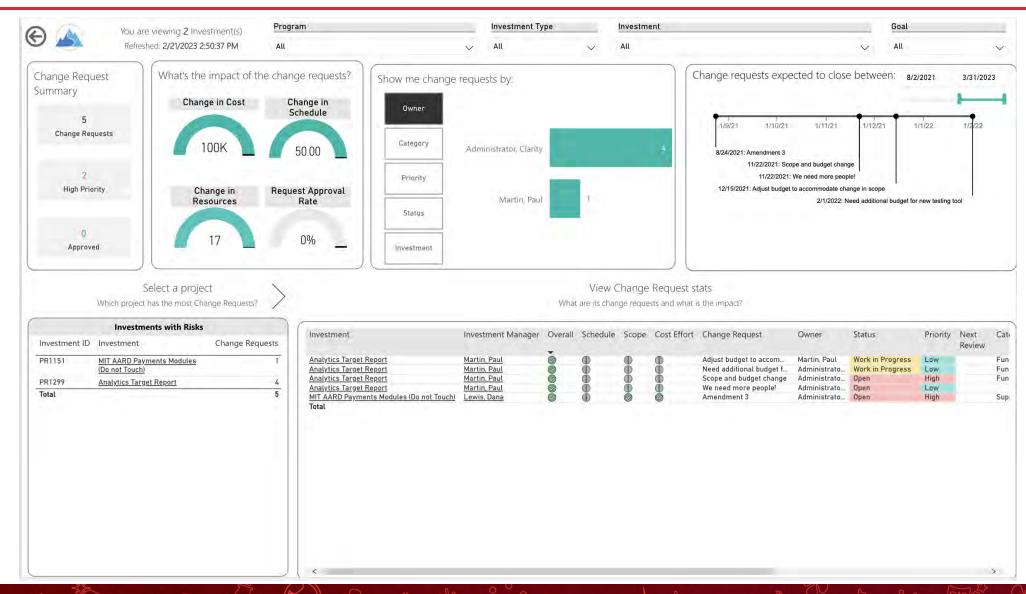
Program Drill Thru



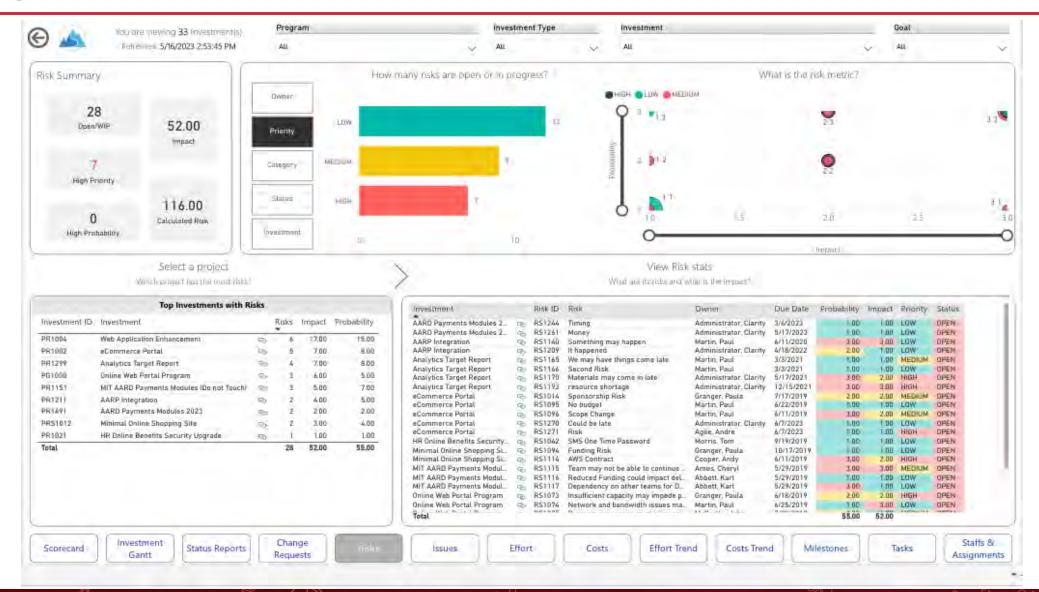
Program Status Reports



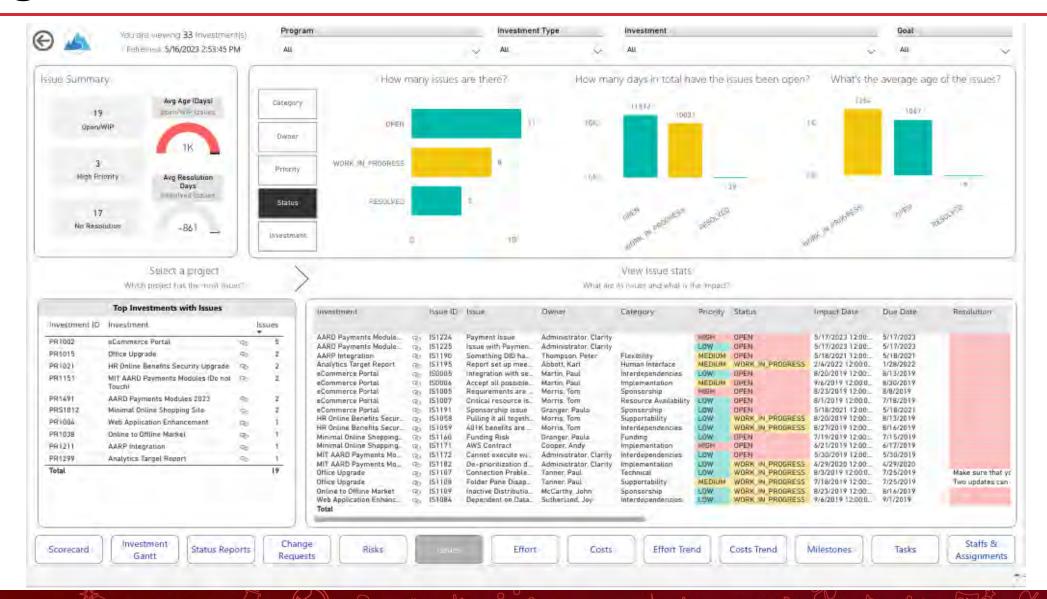
Change Requests



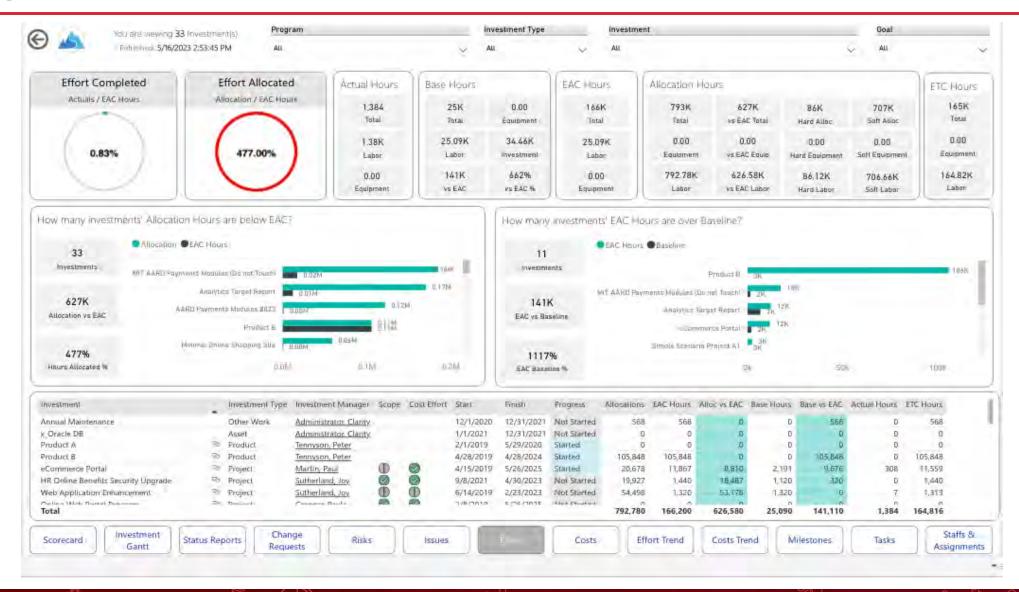
Program Risks



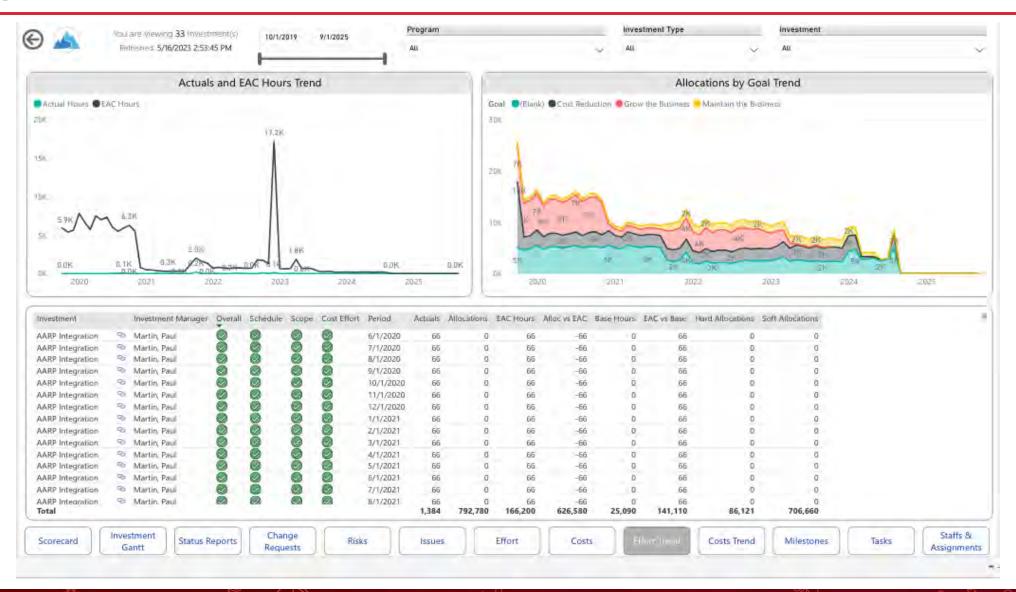
Program Issues



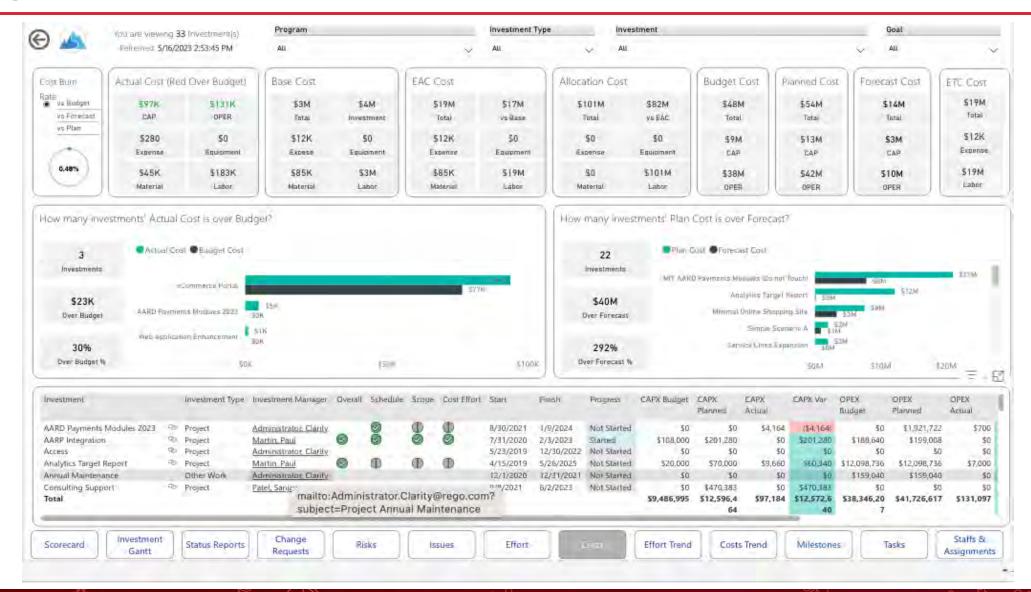
Program Effort



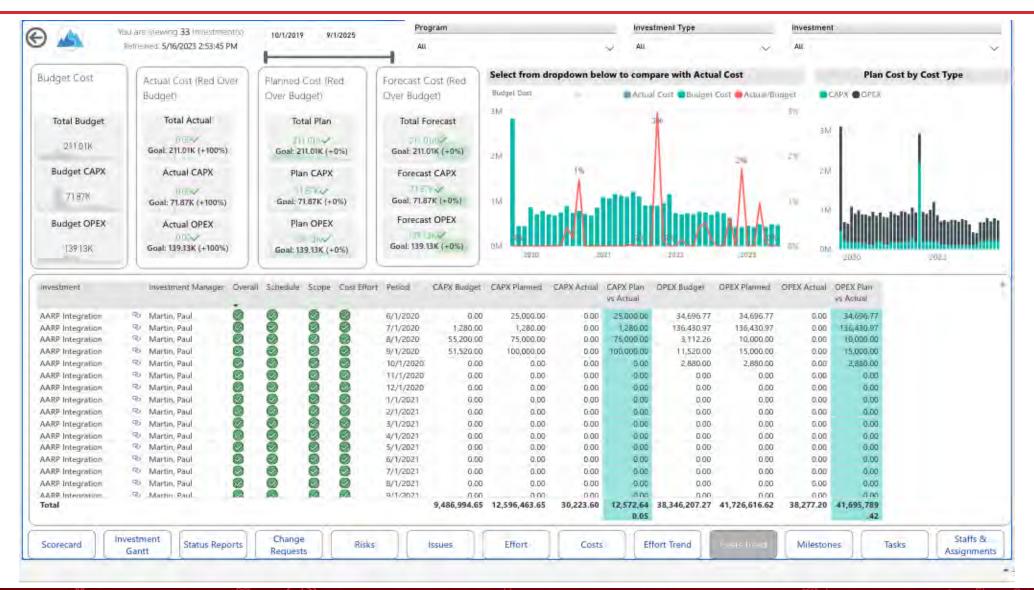
Program Effort Trend



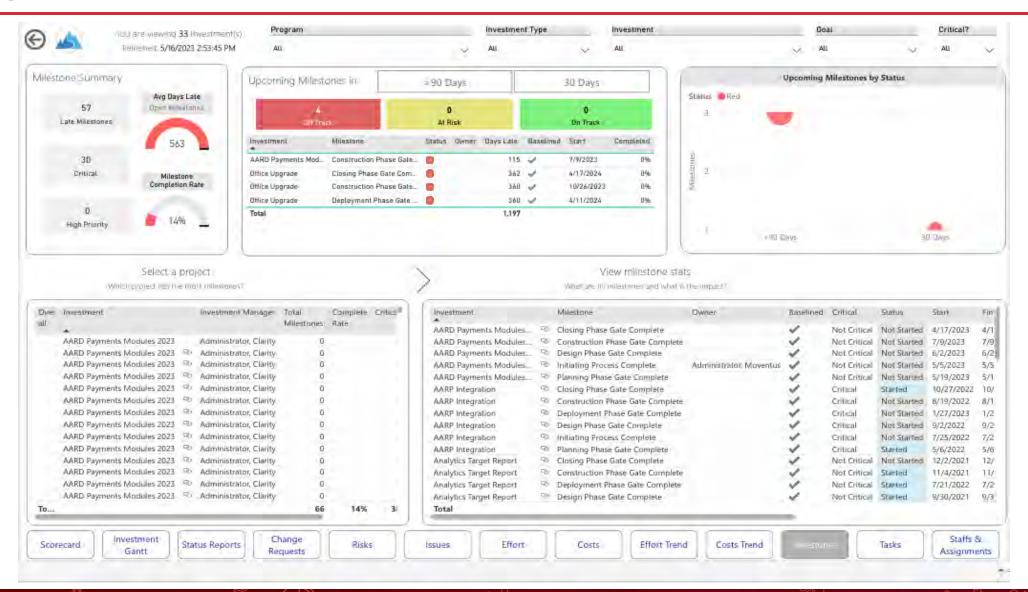
Program Costs



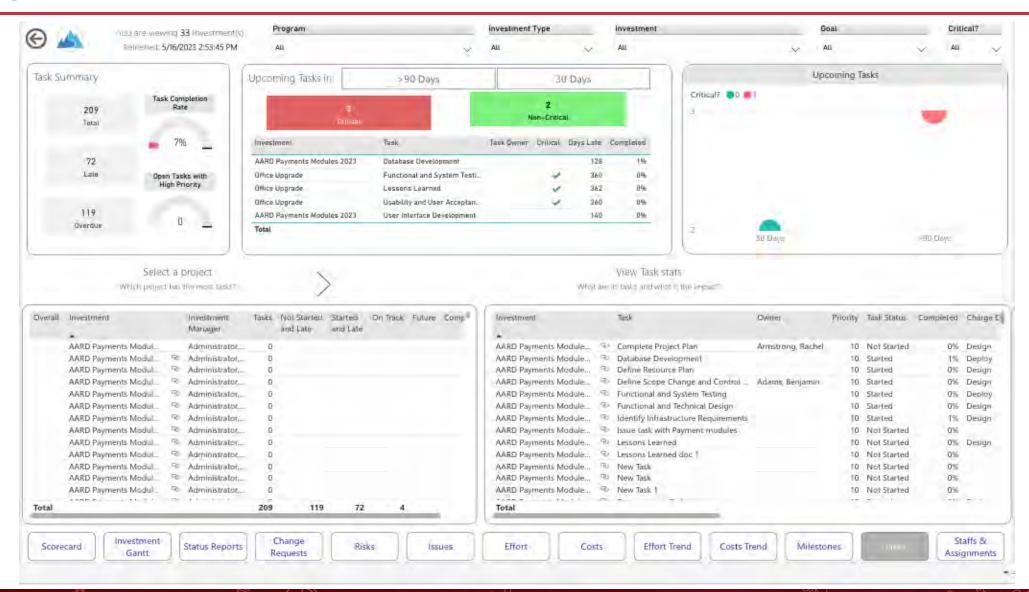
Program Costs Trend



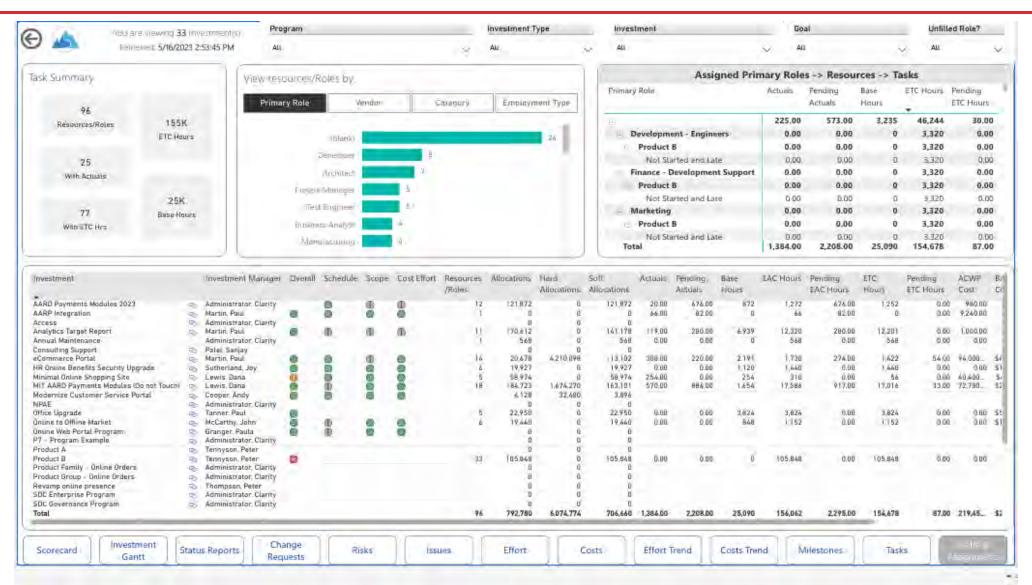
Program Milestones



Program Tasks



Program Staff

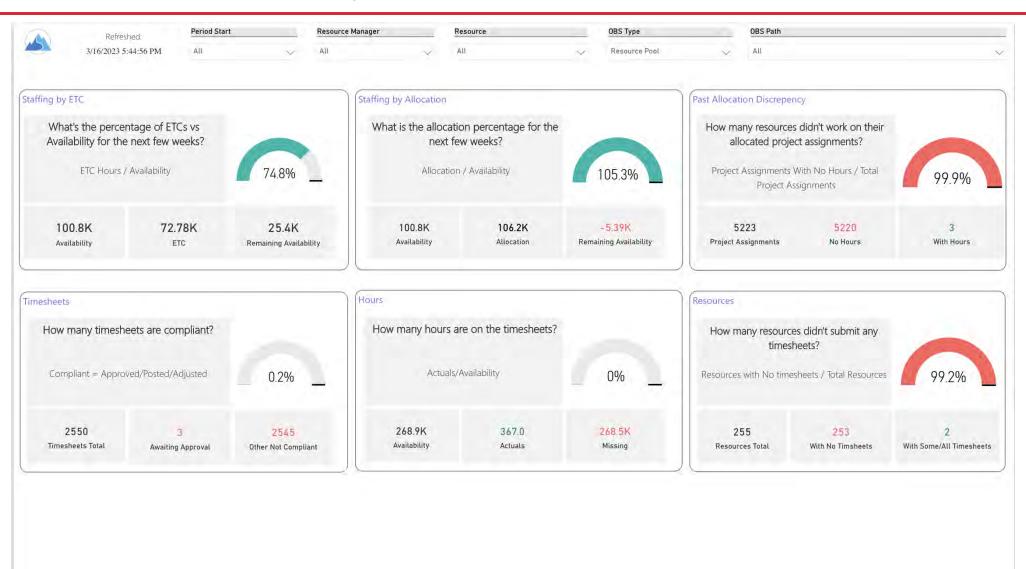


Resource

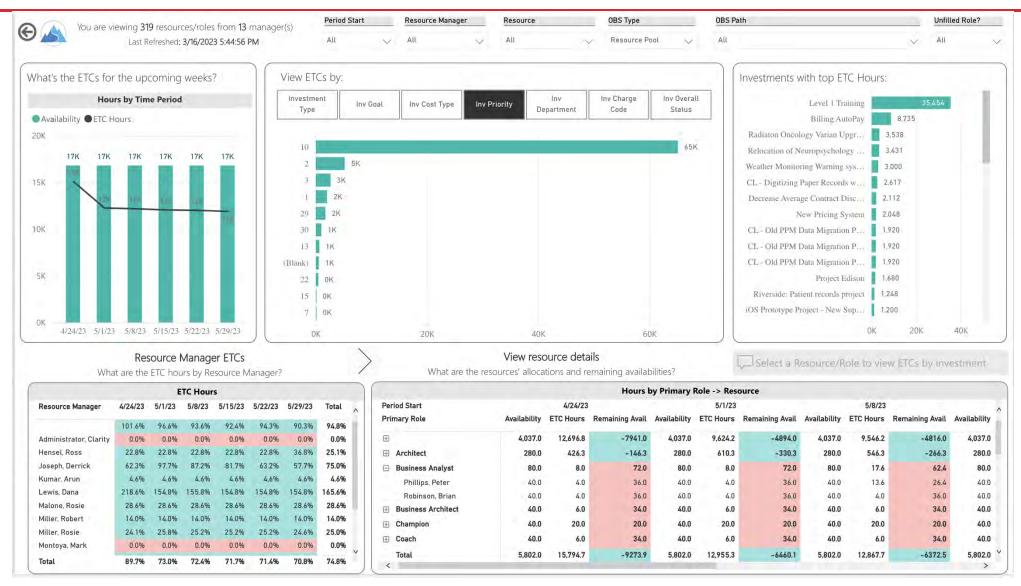




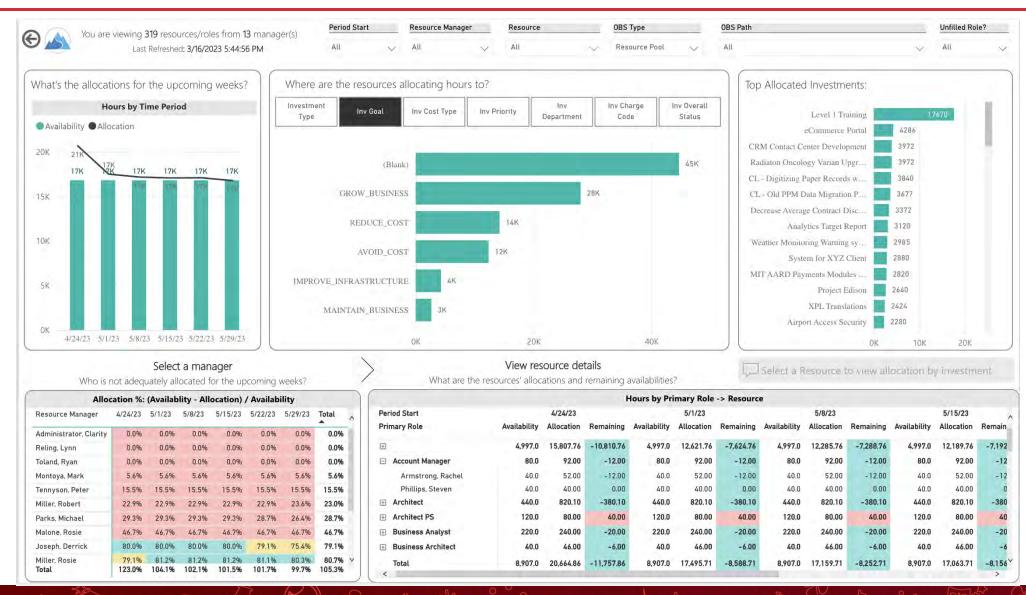
Resource Summary



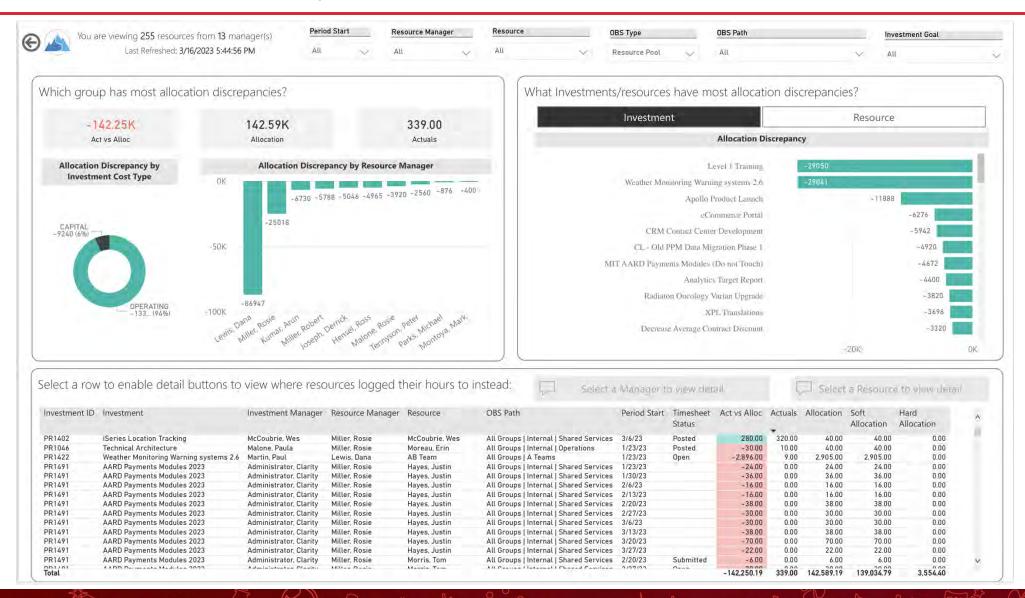
Staffing ETC



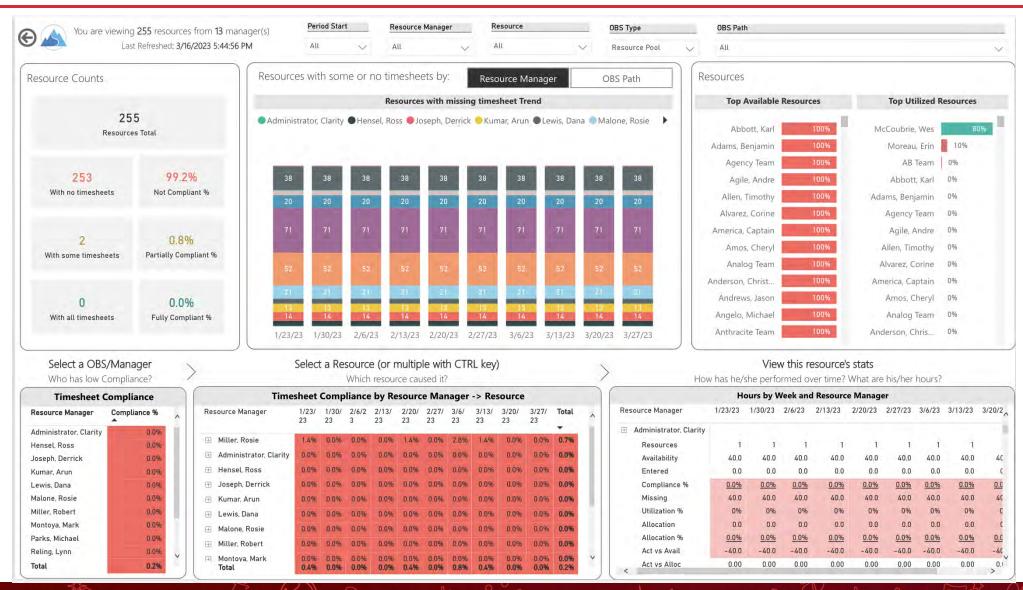
Staffing Allocations



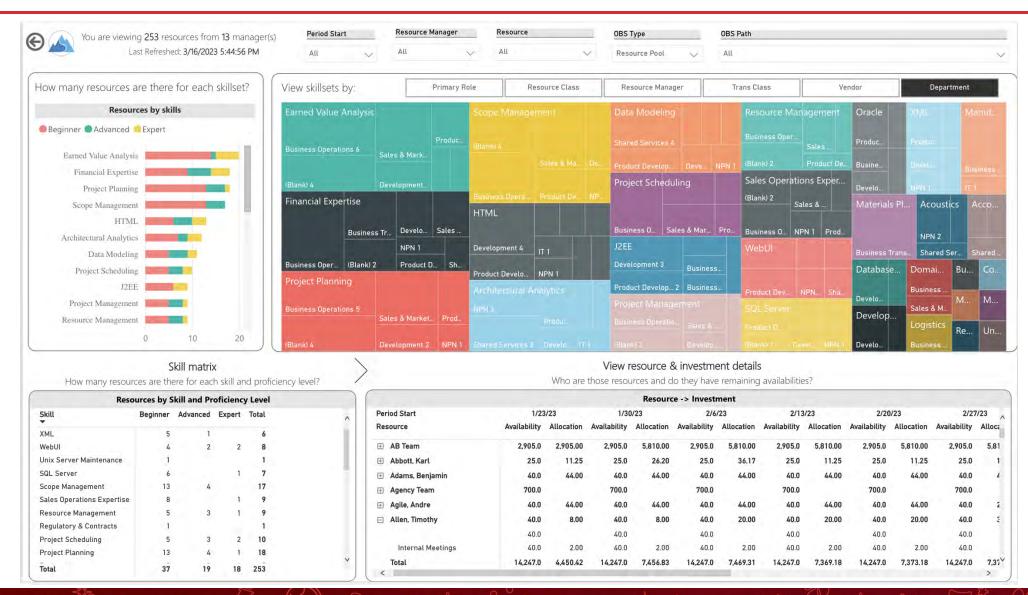
Allocation Discrepancies



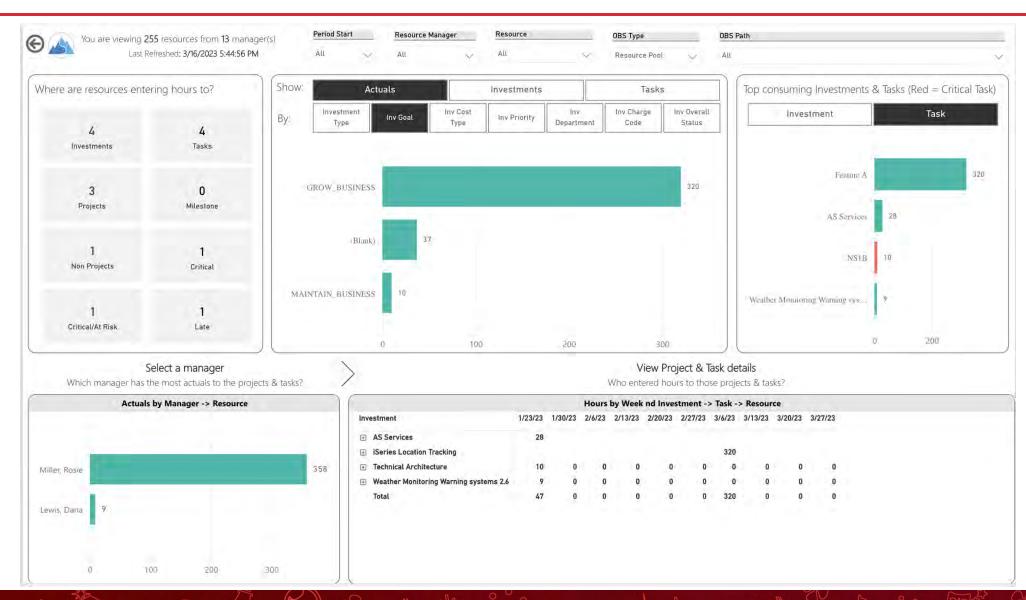
Resource Detail



Resource Skills



Resource Tasks

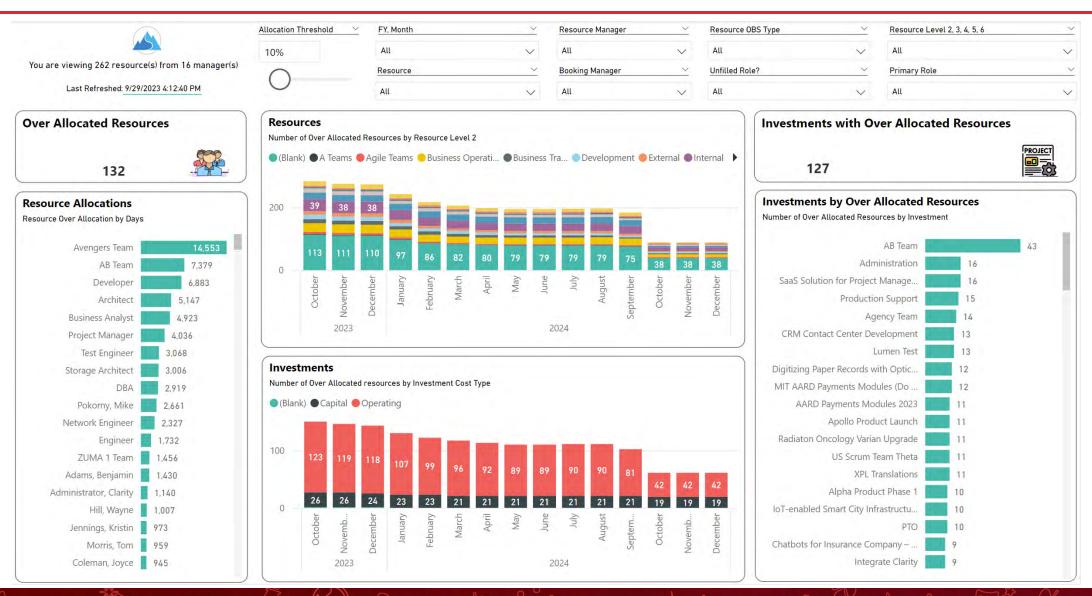


Resource Allocation Planning





Over Allocations



By People





Resource Level 2	%	Resources	Over Allocated
+	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

Red highlight indicates months with o	ver allocated resources							
	Year						2023	
	Month		October			Novem	nber	
Resource Manager	Resource	Resources	Allocation %	Remaining Availability	Resources	Allocation %	Remaining Availability	Resource
Total		261	233.5%	-11,349.60	256	225.5%	-10,523.01	25
+		44	382.6%	-4,496.16	42	361.2%	-4,032.50	4
Administrator, Clarity		11	242.4%	-363.47	10	254.7%	-358.40	1
Hensel, Ross		8	270.7%	-285.46	8	238.5%	-231.56	
Joseph, Derrick		14	197.8%	-298.40	14	191.3%	-278.40	1
Kumar, Arun		13	221.7%	-371.41	13	210.8%	-337.92	1
+ Lewis, Dana		6	267.6%	-3,497.28	6	261.9%	-3,377.88	
Malone, Rosie		15	140.7%	-143.15	15	130.3%	-106.67	1
McCoubrie, Wes		7	190.7%	-149.01	7	190.7%	-149.01	
Miller, Robert		28	134.4%	-225.91	28	127.2%	-178.98	2
- settle- n-d-			400 40/	1 200 12		405 40/	1 150 50	-

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	Арг 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%
12.4		1) 00		*****

By Project

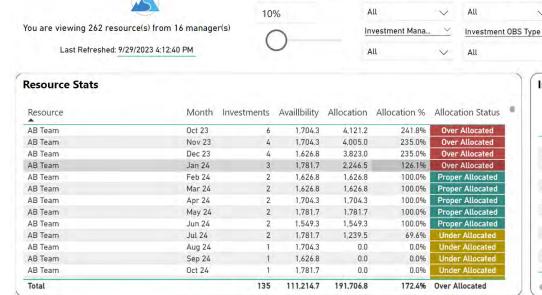




Inv	esource Over Allocated estment OBS 2	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	Ma
HIV	estilletit Ob3 Z	OCI 23	1404 23	Dec 23	Jan 24	160 24	IVIGI 24	Apr 24	IVIC
\pm		56.1%	56.0%	56.4%	55.8%	50.6%	50.0%	48.6%	5
\oplus	Administration	8.7%	8.7%	8.7%					
\pm	Agile	100.0%	100.0%	100.0%					
#	Business 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%	E
+	Business Transformation	85.7%	84.6%	84.6%	75.0%	75.0%	75.0%	75.0%	6
\pm	Corporate	25.0%	25.0%	25.0%	25.0%	37.5%	37.5%	25.0%	
1	Development	85.3%	85.7%	85.7%	95.7%	91.7%	91.7%	91.7%	9
1	Mobile Initiatives	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	10
\blacksquare	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
\pm	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

Red highlight indicates the months Resources	are Over Allegated in															
Red highlight indicates the months Resources	are over Attocated in															
	Year	2023						2024								
	Month	October		November		December		January		February		March		April		May
Investment	Resource	Resources	Allocation	Resources												
+		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
Al-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

nvestment Stats					
Investment	Resources	Over Allocated	% Resource Over Allocated	Schedule Start	Schedule Finish
	1	1	100.0%		
Al-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%		

Unfilled.

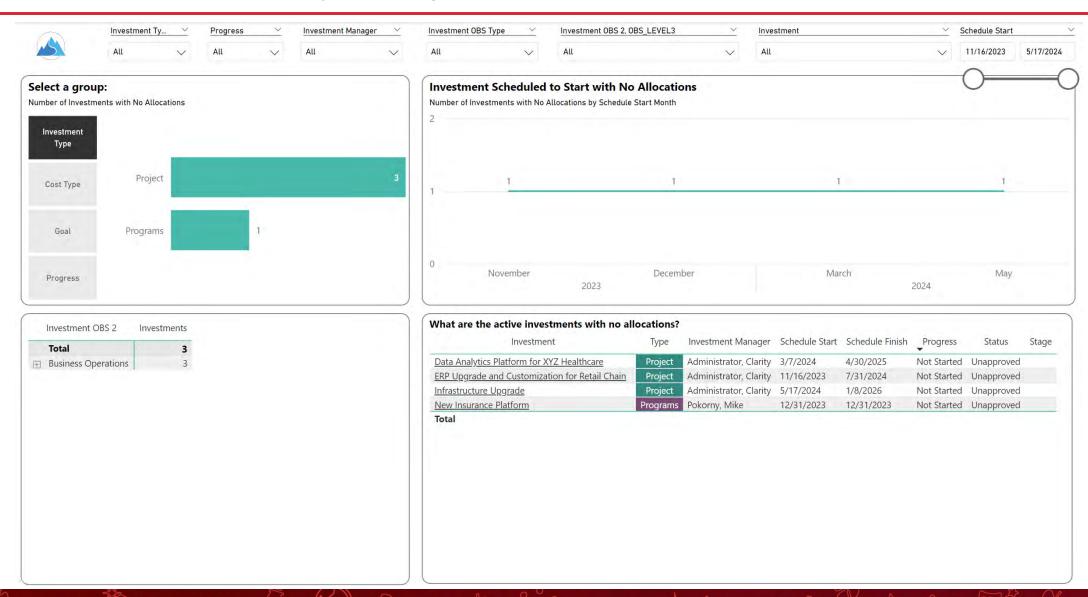
Primary Role

Investment

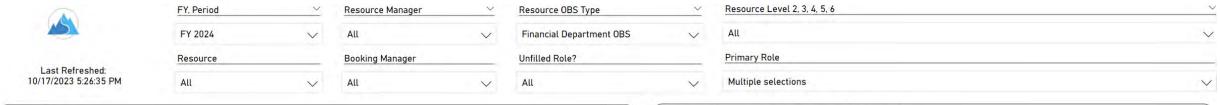
	Year			20	23														2024
nvestment	Month Resource	Octo	ober	Nove	mber	Dece	mber	Jani	uary	Febr	uary	Ma	irch	Ap	oril	M	ay	Ju	ne
		Resources	Allocation F																
+		1	23.47	1	23.47	1	1.07												
AARD Paym	ents Modules	15	86.17	15	83.50	15	78.44	15	285.69	15	365.16	15	365.16	15	382.54	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	ion	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 Tear	m	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
Al-powered Translation International	Tool for	5	105.60	5	105.60	5	100.80	5	110.40	5	91.20								
Airport Acce	ess Security	13	13.33	13	6.67	13	6.67												
Alpha Produ	uct Phase 1	10	132.82																
Analog Tean	n	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 Ta	raet 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

V

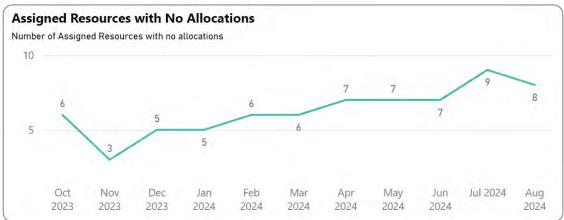
No Allocation by Project



No Allocation by People







	Resource Level 2	Not A	llocated %	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	
Ŧ	Internal Audit-6			5	
+	Legal and Corporate Services-			93	
1	Office of Safety and Quality			38	
+	Operations		0.2%	1,144	2
\pm	Technology		0.6%	1,444	g

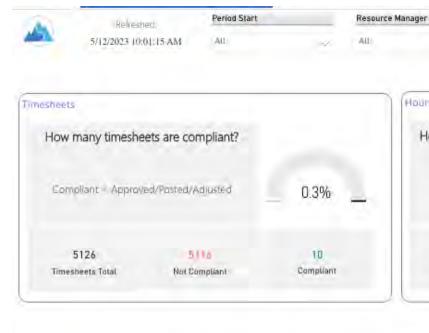
Resource	Month	Availability	Resource Manager	Email	Booking Manager	Primary Rc
Allaby, Colleen	May 24	22.0	Dugas, lan			Manager - Gestionnaire
Allaby, Colleen	Jul 24	22.0	Dugas, lan			Manager - Gestionnaire
Kinnie, Brian	Jan 24	22.0	Smith, Calvin		Sullivan, Cassandra	Electrical Specialist - Spécialiste 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

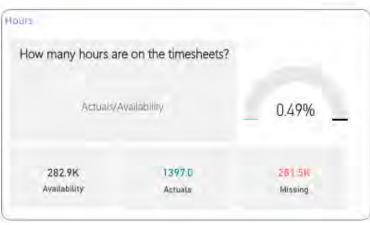
Timesheet Compliance





Timesheet Summary





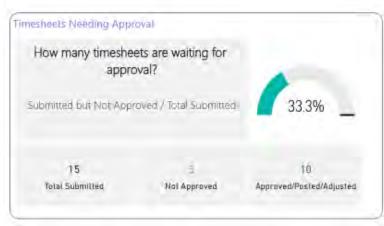
Resource

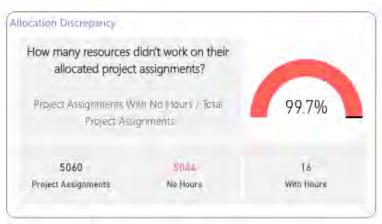
OBS Type

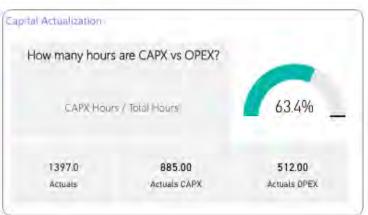
Resource Pool



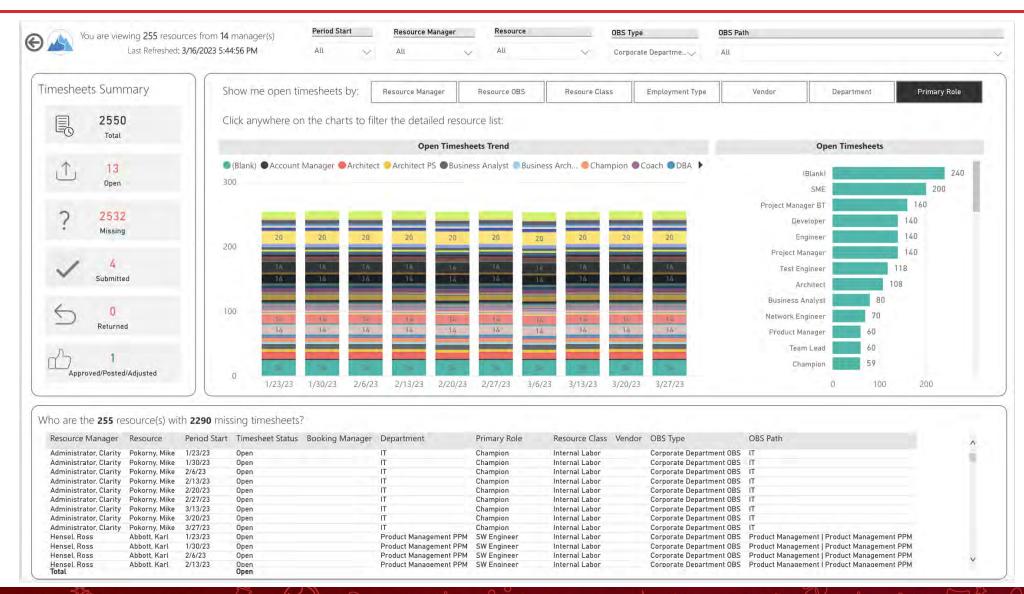
OBS Path



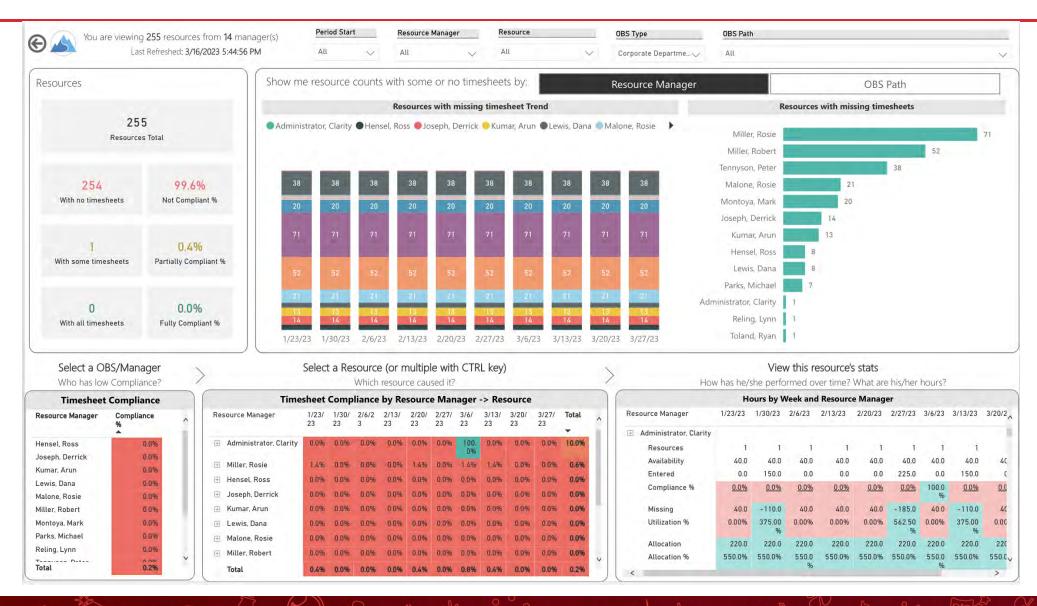




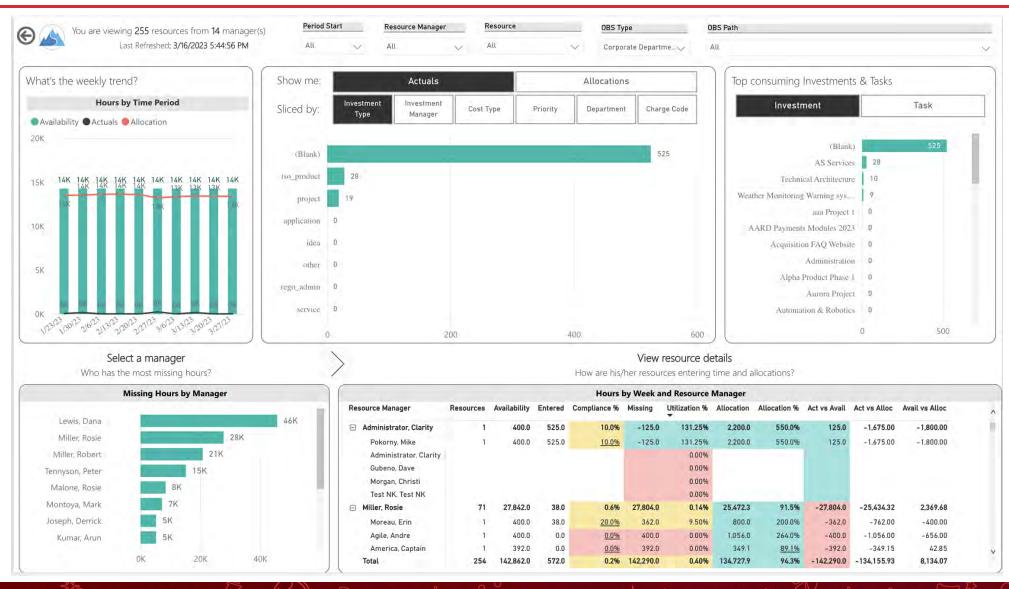
Timesheet Detail



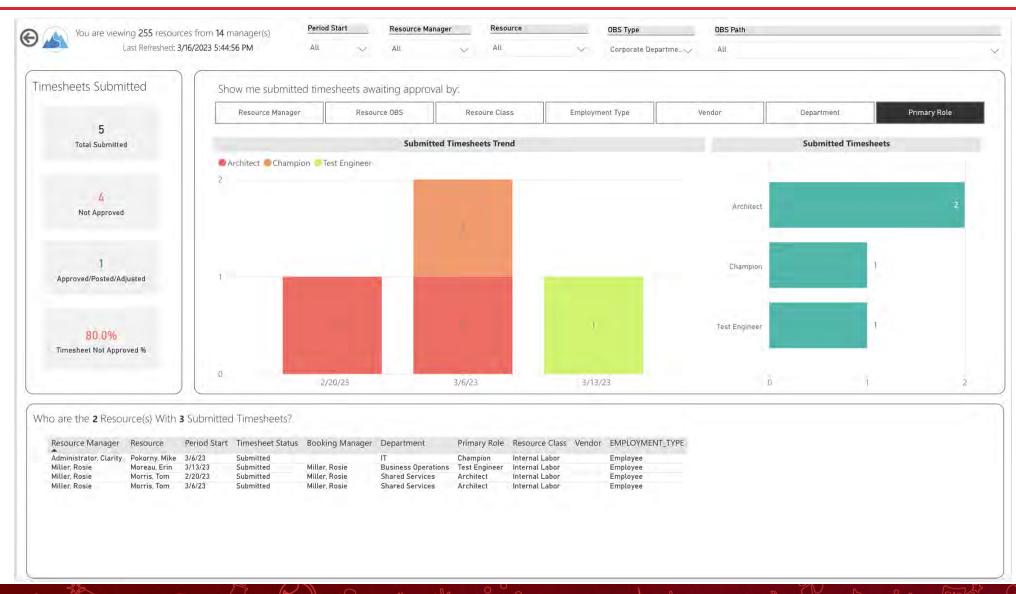
Resource Detail



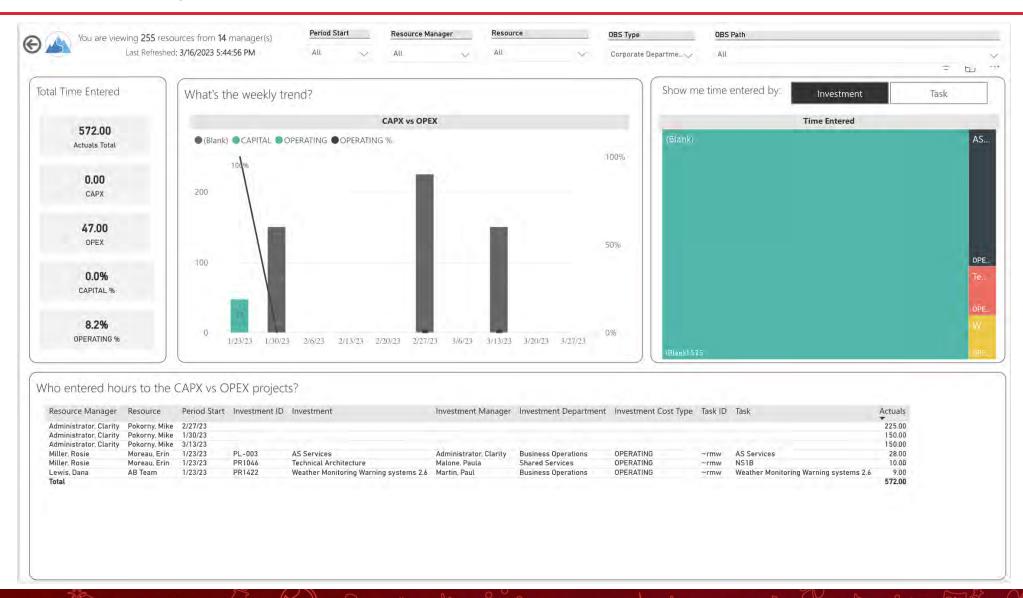
Hours Detail



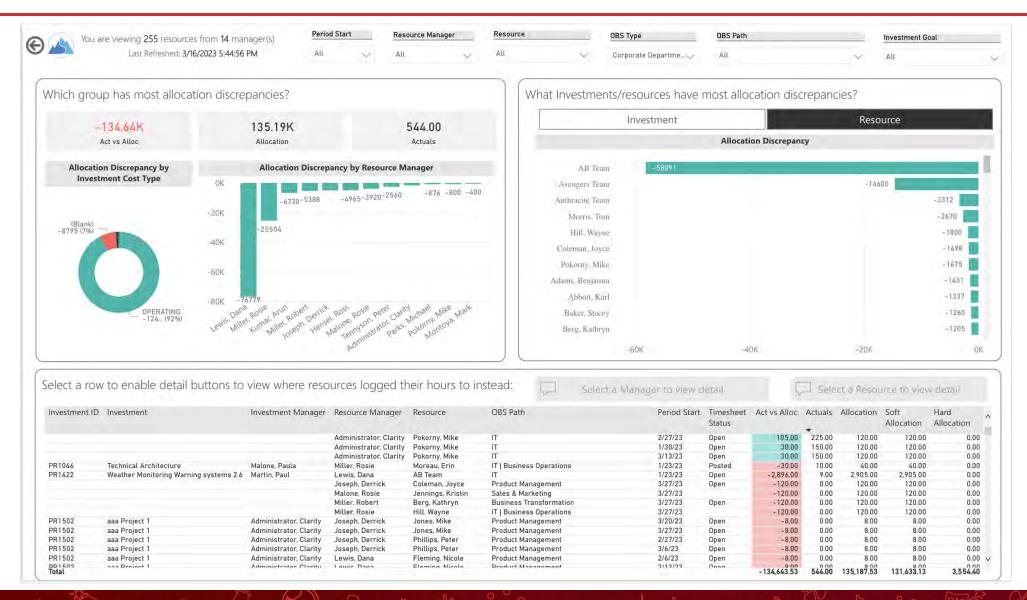
Unapproved Timesheets



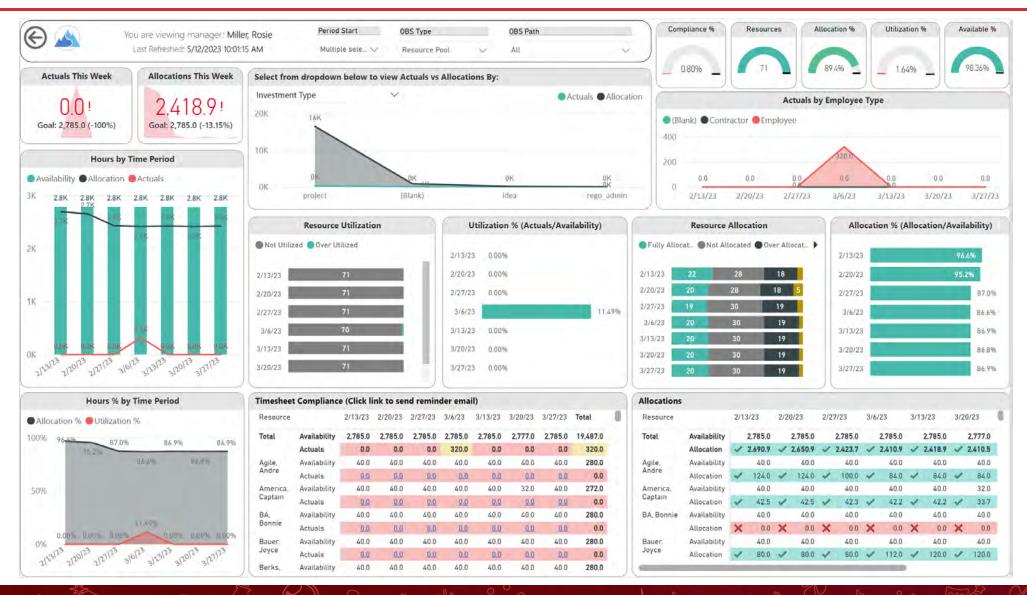
Capex vs Opex



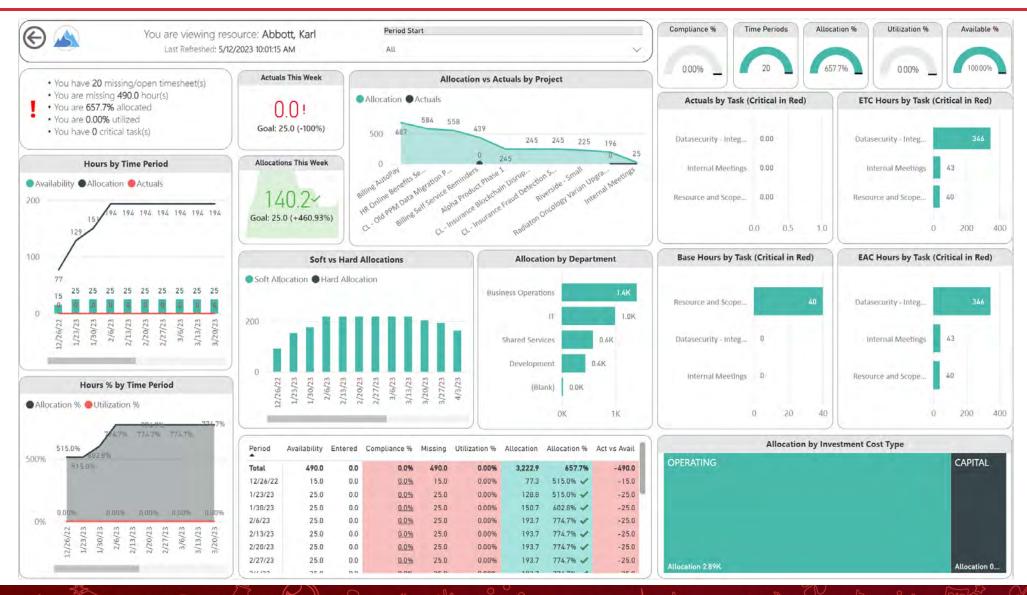
Allocation Variance



Single Manager Drill Down



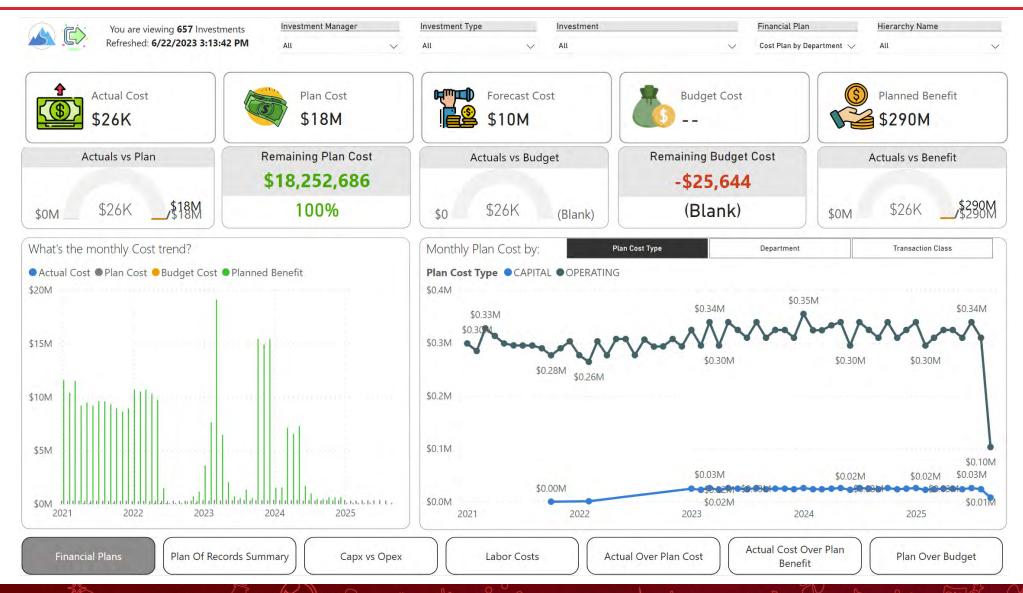
Single Resource Drill Down



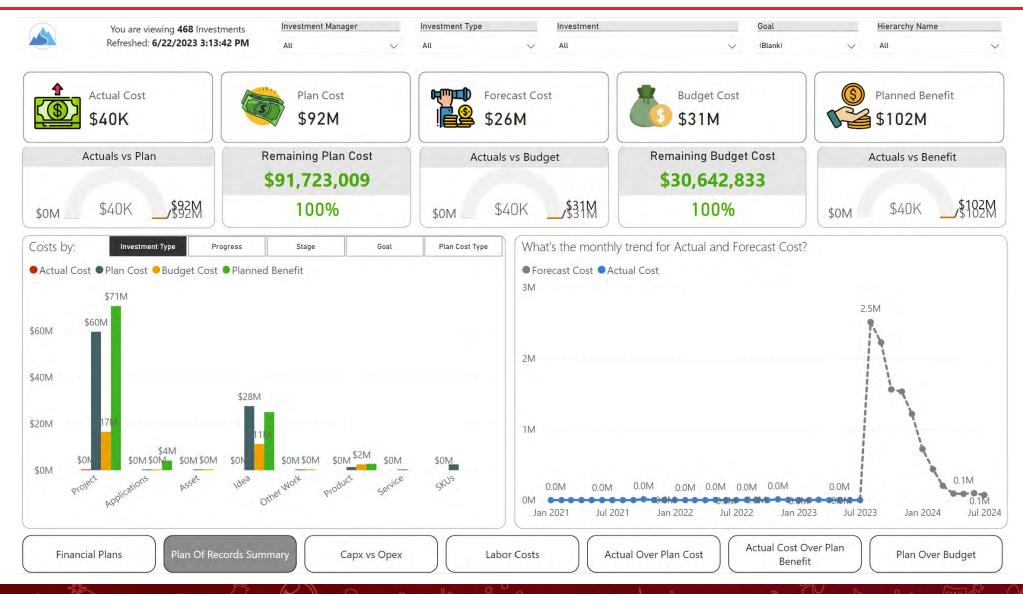
Financial



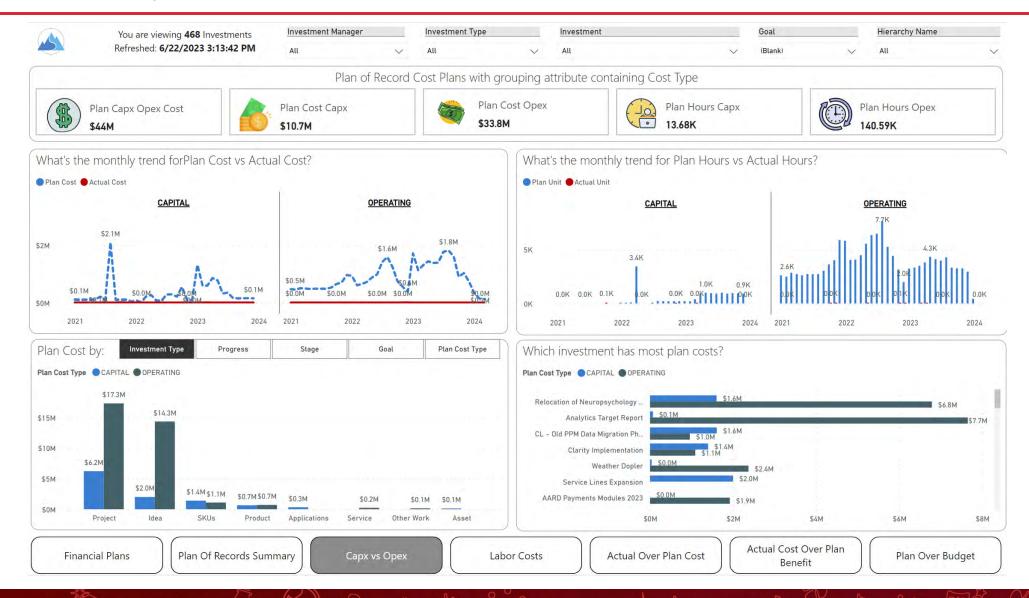
Financial Plans



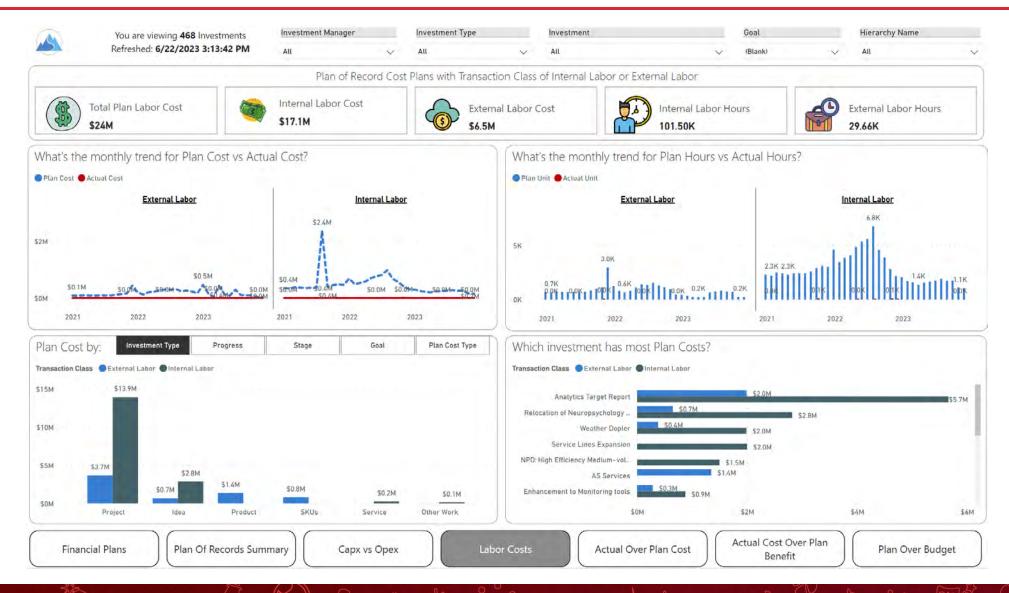
Plan of Records Summary



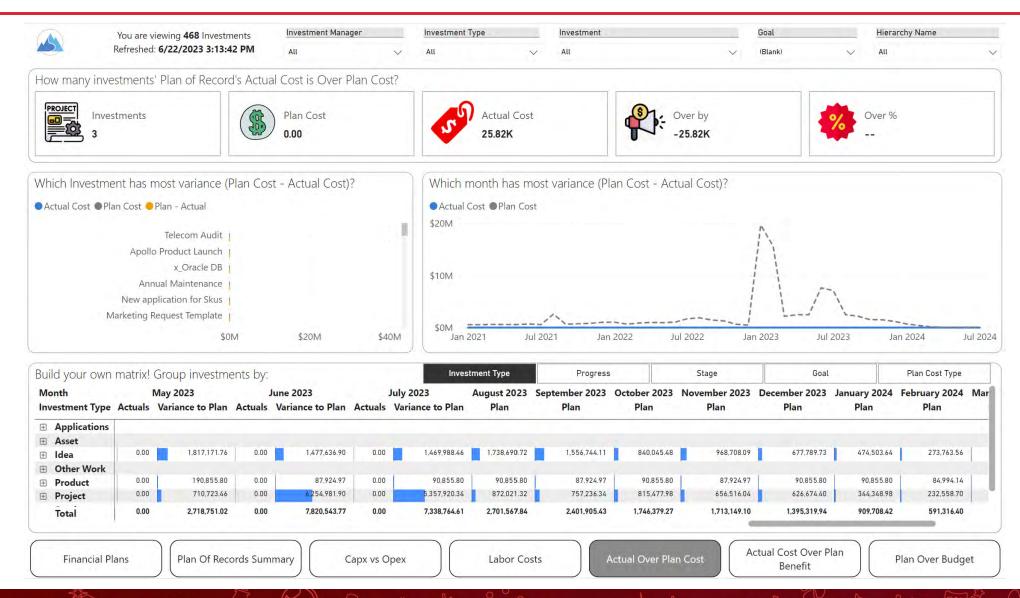
Capx vs Opex



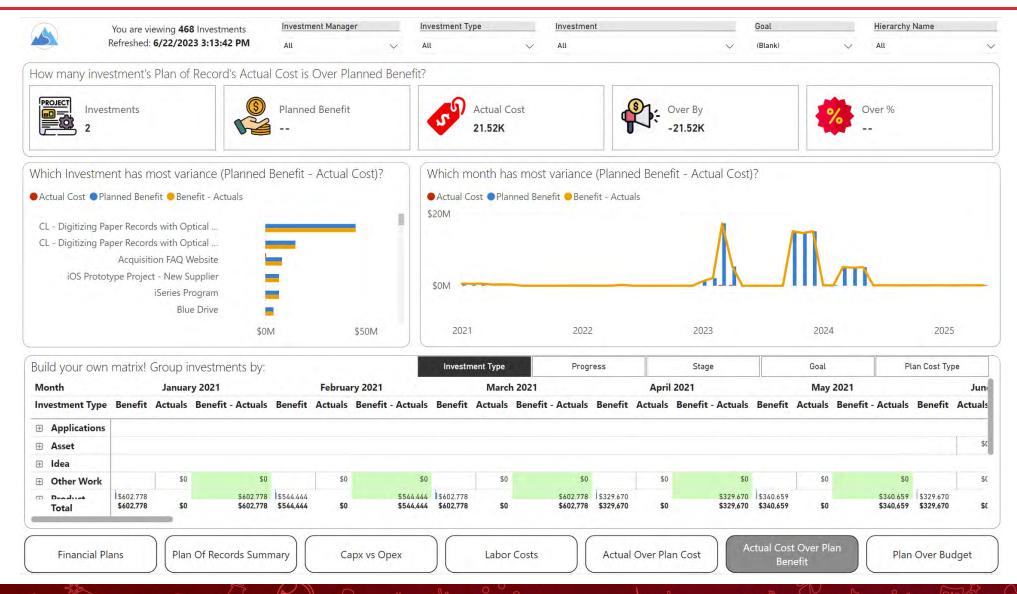
Labor Cost



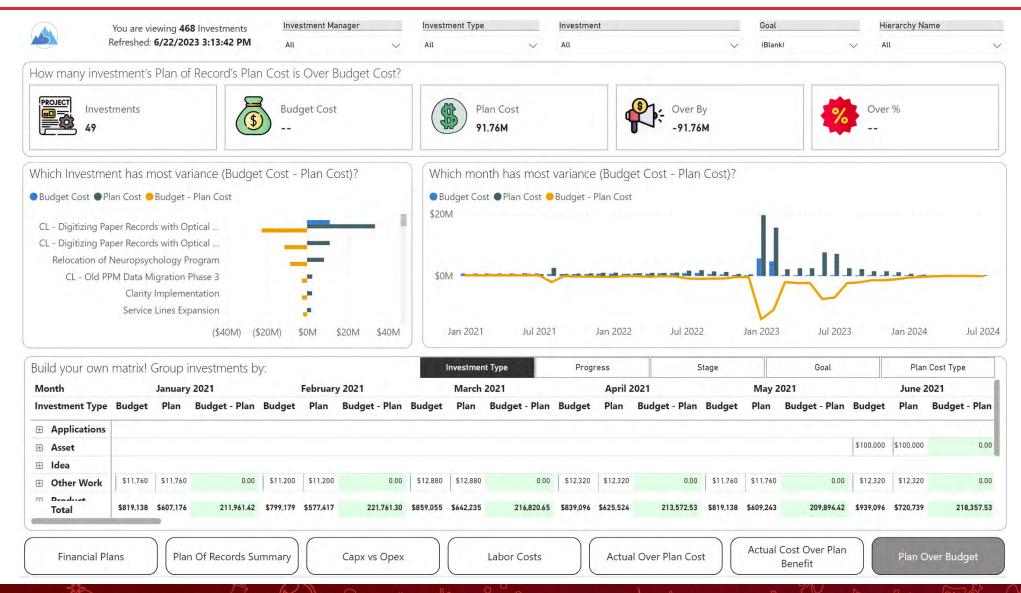
Actual Over Plan Cost



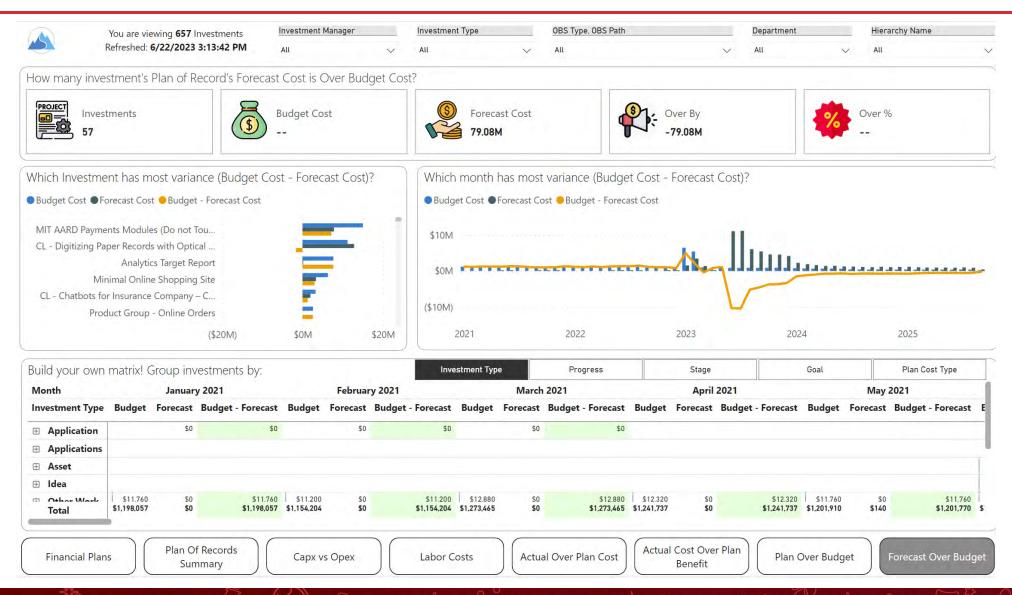
Actual Cost Over Plan Benefit



Plan Over Budget Cost



Forecast Over Budget Cost



Data Integrity

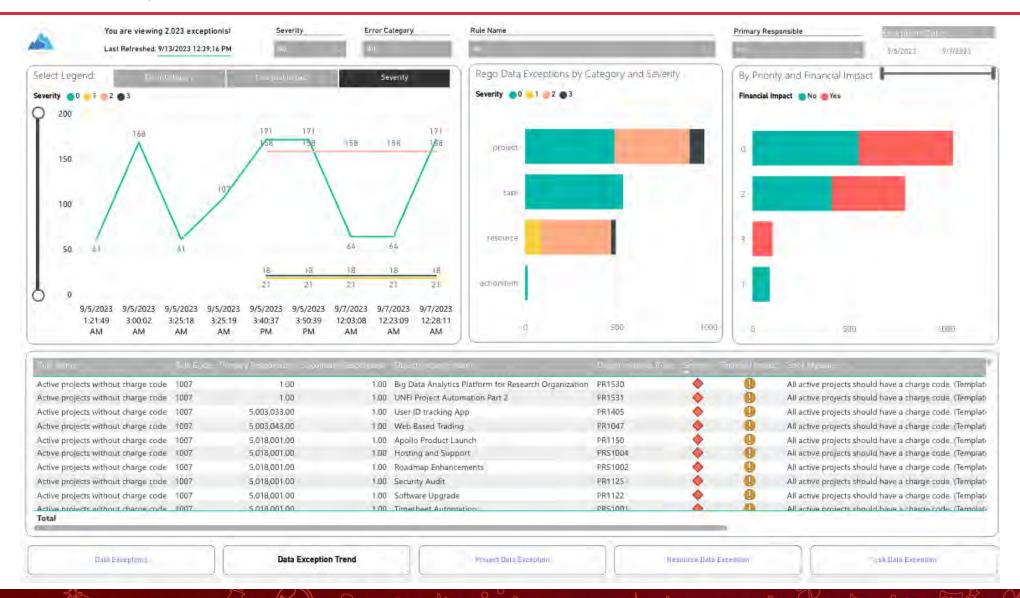




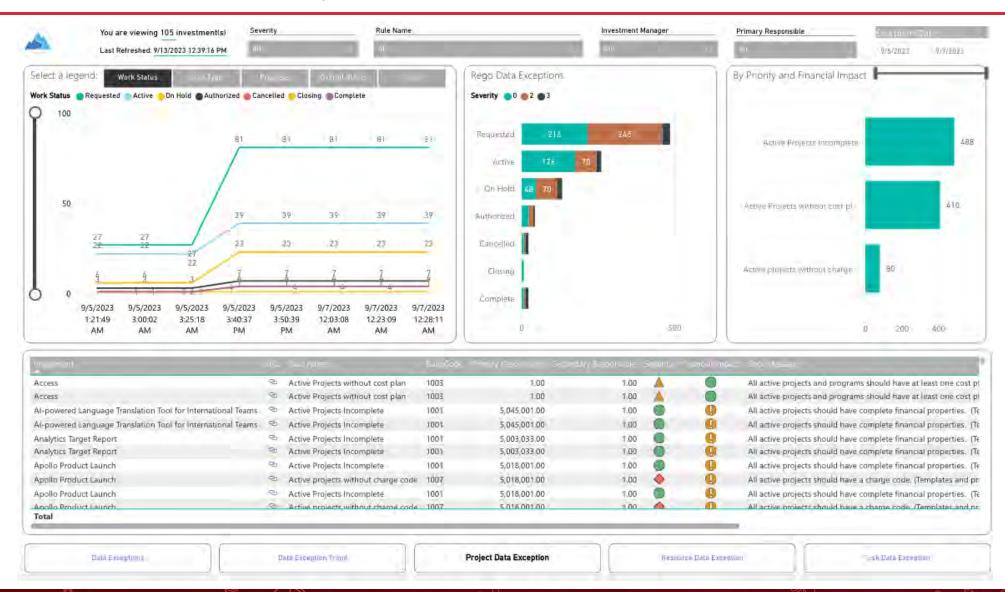
Data Exceptions



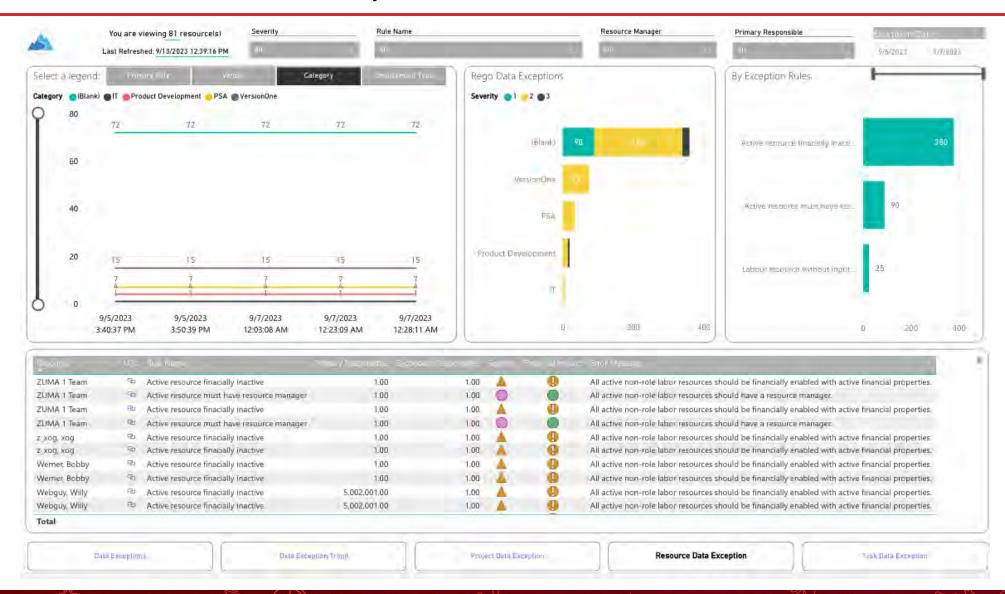
Data Exception Trend



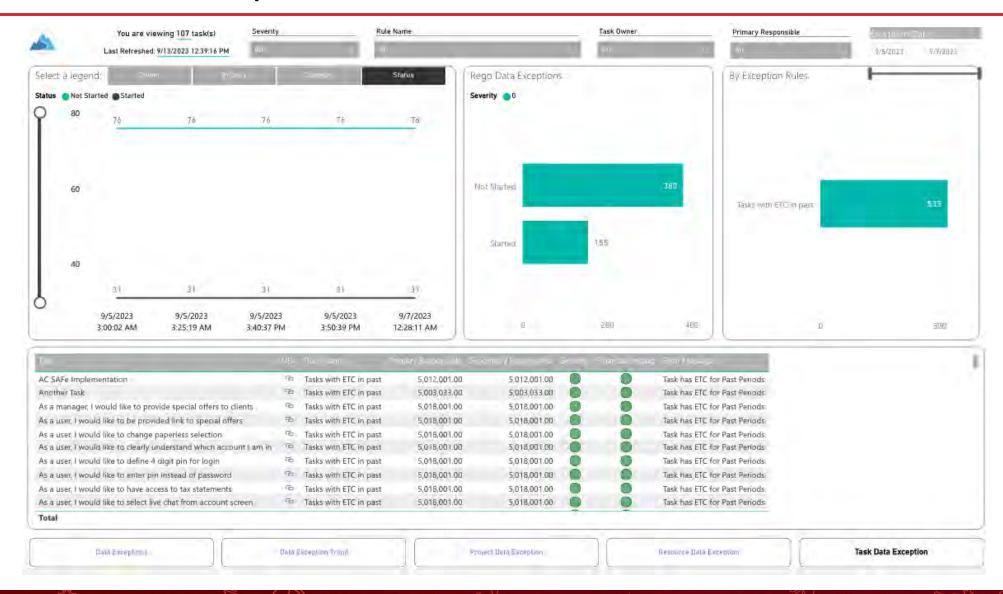
Project Data Exception



Resource Data Exception



Task Data Exception



Adoption Metrics





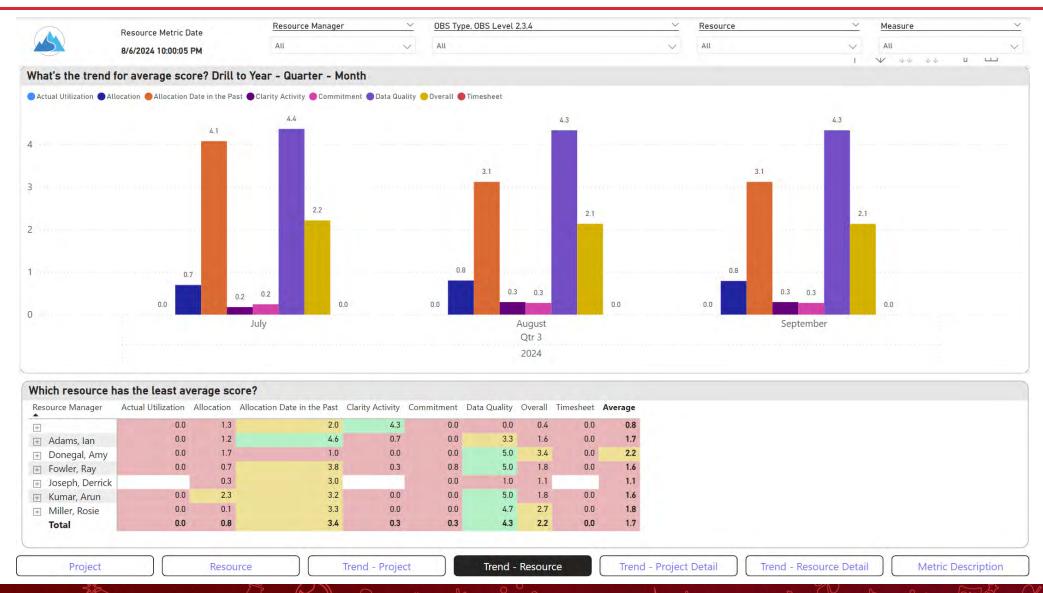
Project Metrics



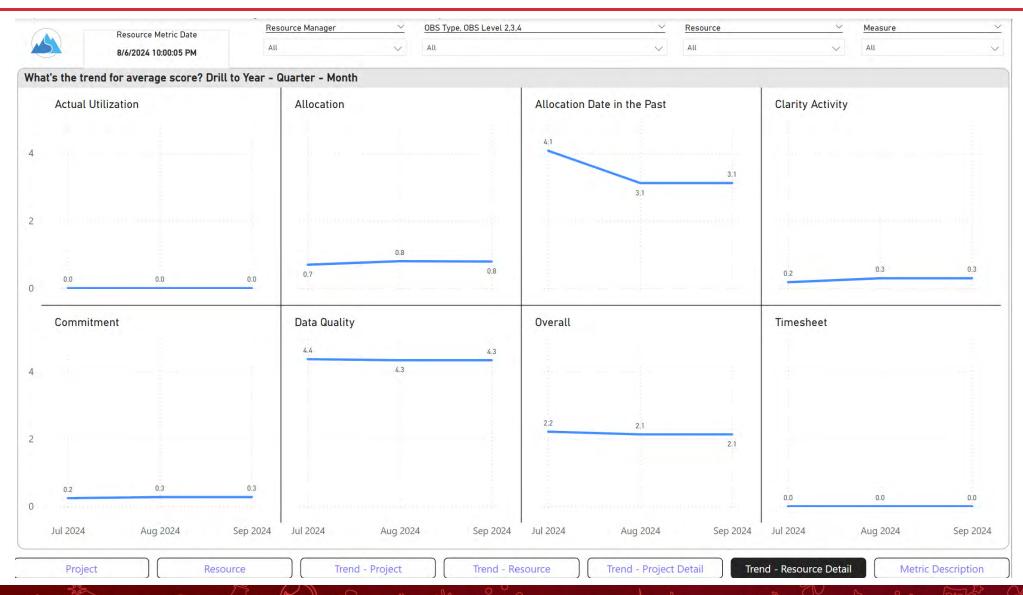
Resource Metrics



Resource Trends



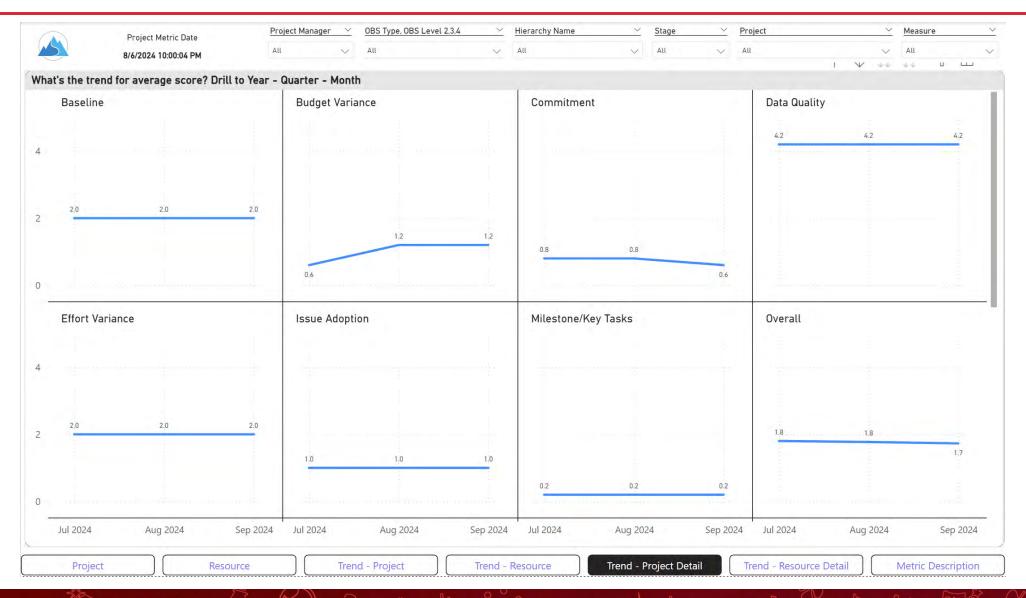
Resource Trend Detail



Project Trends



Project Trend Detail



Metric Definition

Project Metrics	
Project Baseline	Do any baselines exists 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 P	ast 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





Dark Theme





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