

Agenda

- Introduction
- Customer Reporting Samples
- Questions
- Additional Resources

Introductions

• Take 5 Minutes

• Turn to a Person Near You

• Introduce Yourself

Business Cards

Presenters

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

- National Student Clearinghouse Gail Sander
- Mayo Clinic EPMO Jessica McNeil
- Mayo Clinic IT Renae Shellum, Jen Baird,
 Sheila Stejskal
- Unum Paul Baumberger

Client Reporting Samples



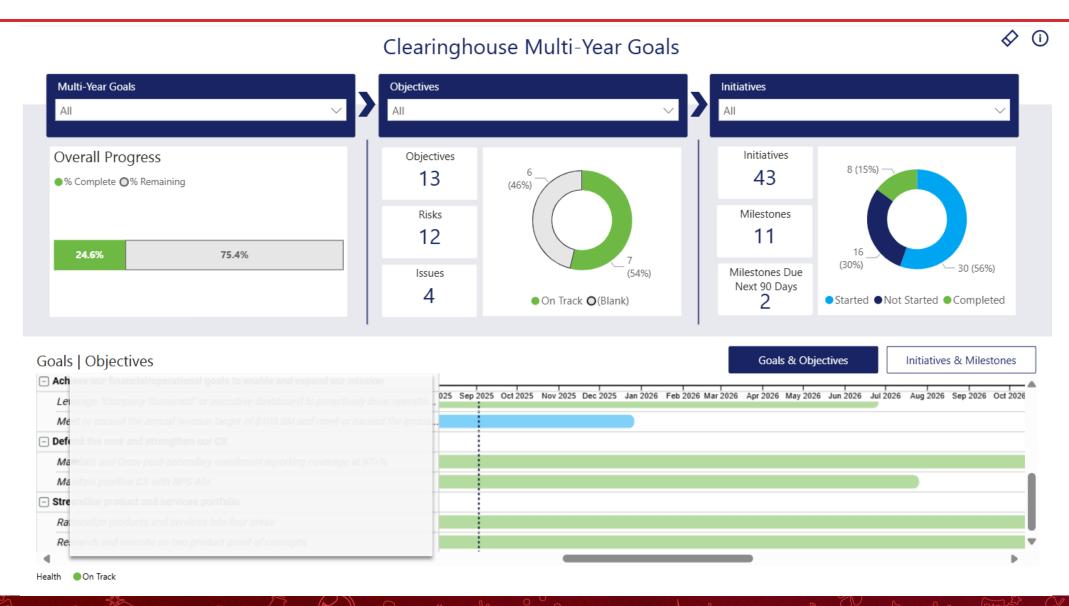




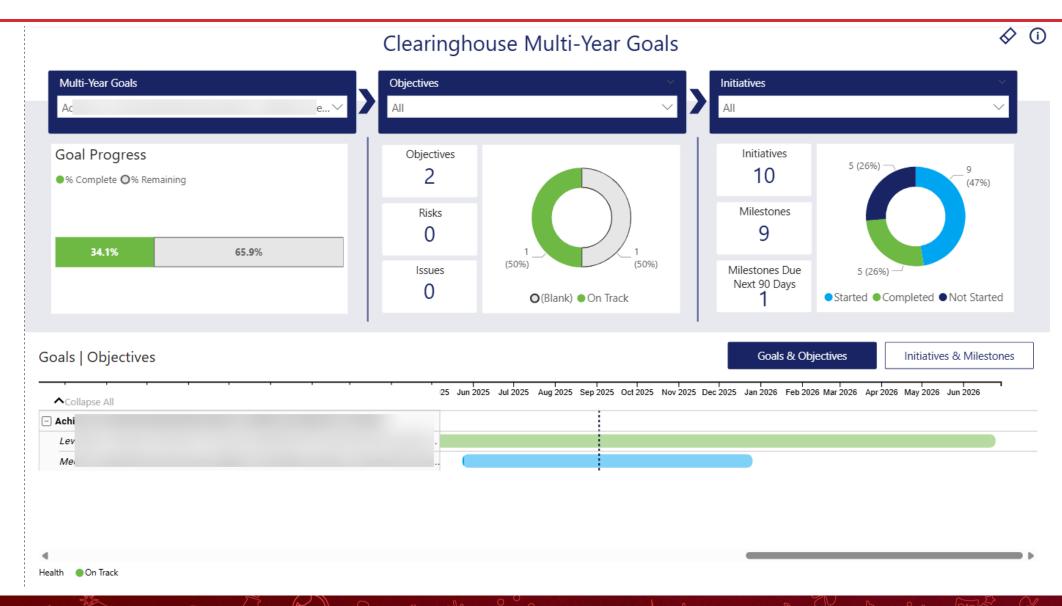
Gail Sander



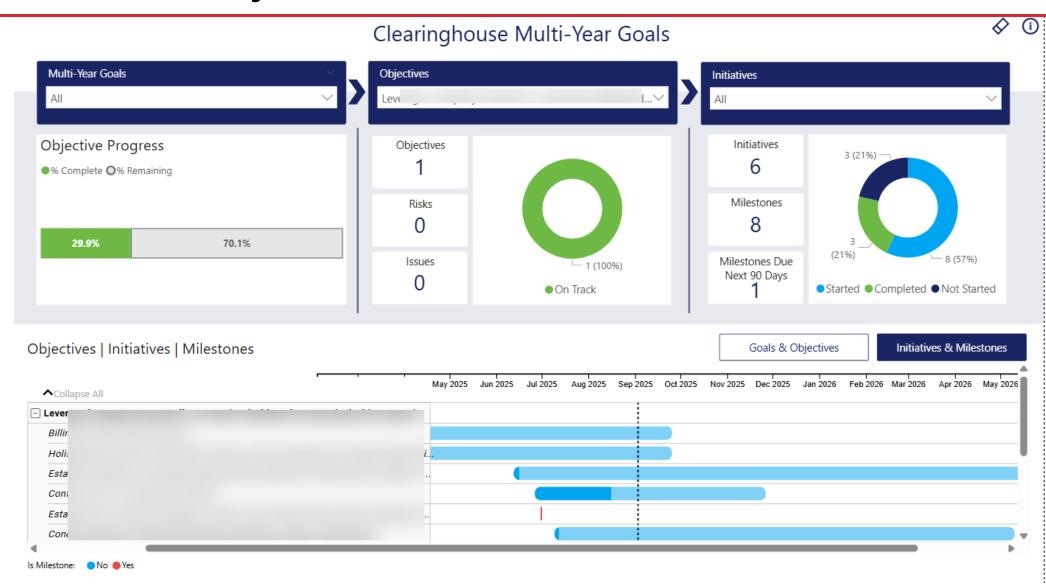
Multi-Year Goals



Filtered on Goal



Filtered on Objective





Jessica McNeill



Program Status Report

For instructions on running this report, see this quick reference guide.

START/FINISH

Submitted on: November 14, 2022

Example Program Finance SPONSOR Last Name, First Name PROGRAM MANAGER Schedule Last Name, First Name

Total Budget: \$15,000,000 Total Spent: \$8,500,000 Capital: \$3.500.000 Expense: \$5,000,000

57% **Budget Spent**

PRJ010000

Executive Summary: The executive summary submitted with the status report for the Program appears here. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Subproject 1- PRJ000000

Sponsor: Last Name, First Name PM: Last Name, First Name Sched. Finish: 03/31/2023 Stage: Execute Total Spent: \$1,000,000 Submitted Date: November 14, 2022

Scope

Status Note: Status note appears here if one exists and the project is red or yellow.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Subproject 4 - PRJ000000

Sponsor: Last Name, First Name PM: Last Name, First Name Sched. Finish: 03/31/2023 Stage: Execute

Total Spent: \$3.000.000 Scope | Submitted Date: November 14, 2022

Executive Summary: Executive summary appears here.

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Subproject 2- PRJ000000

04/16/2020 - 09/30/2025

Sponsor: Last Name, First Name PM: Last Name, First Name Sched. Finish: 12/31/2022 Stage: Execute Total Spent: \$2,000,000 Scope | Submitted Date: November 14, 2022

Status Note: Status note appears here if one exists and the project is red or yellow.

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Subproject 5- PRJ000000



Sponsor: Last Name First Name PM: Last Name, First Name Sched. Finish: 05/23/2025 Stage: Execute Total Spent: \$2,000,000 Scope | Submitted Date: November 14, 2022

Executive Summary: Executive summary appears here.

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Subproject 3- PRJ000000

Sched. | Finish: 07/31/2024

Sponsor: Last Name, First Name PM: Last Name, First Name Stage: Execute

Total Spent: \$500,000 Scope | Submitted Date: November 15, 2022

Executive Summary: Executive summary appears here.

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Key Accomplishments: Key Accomplishments of the Program appear here.

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🛗 Schedule

Risks/Issues

Mayo Clinic Standard Program Status Report

Report run on: December 05, 2022

Schedule

				Schedule			
12/30/2022	12/30/2022	Milestone			•	Milestone Comments	
12/30/2022	12/30/2022	Milestone			•	Milestone Comments	
12/30/2022	12/30/2022	Milestone			•	Milestone Comments	
➤ Subproject 3							PRJ000000
11/30/2022	11/30/2022	Milestone			•	Milestone Comments	
12/30/2022	12/30/2022	Milestone			•	Milestone Comments	
12/30/2022	12/30/2022	Milestone			•		
12/31/2022	12/31/2022	Milestone			•		
Subproject 4							PRJ000000
12/31/2022	12/31/2022	Milestone			�	Milestone Comments	
12/31/2022	12/31/2022	Milestone			•		
12/31/2022	12/31/2022	Milestone			•	Milestone Comments	
12/31/2022	12/31/2022	Milestone			•	Milestone Comments	
12/31/2022	12/31/2022	Milestone			•	Milestone Comments	
12/31/2022	12/31/2022	Milestone			•		
12/31/2022	12/31/2022	Milestone			•		
12/31/2022	12/31/2022	Milestone			•	Milestone Comments	
03/31/2023	03/31/2023	Milestone			*	Milestone Comments	
▶ Sub Sub	project 1						PRJ000000
12/30/2022	12/30/2022	Milestone			•	Milestone Comments	
12/30/2022	12/30/2022	Milestone			♦		
12/30/2022	12/30/2022	Milestone			*		
12/30/2022	12/30/2022	Milestone			•	Milestone Comments	
◆ Page 1				Mayo Cl	inic Standa	rd Program Status Report	Report run on: December 05, 202

Key Risks/Issues

		🏳 Key Risks/Is	sues			
Risk / Issue	Name	Description	Action Plan	Priority	Status	Target Resolution Date
		Dolor purus non enim praesent elementum facilisis leo vel.	Dolor purus non enim praesent elementum facilisis leo vel. Leo a diam sollicitudin tempor id eu nisl. Quam pellentesque nec nam aliquam sem et tortor consequat. Sollicitudin tempor id eu nisl nunc mi ipsum.			
▼ Subproject	2					PRJ000000
RISK	Subproject Risk	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	High	Open	12/30/2022
▼ Subproject	3					PRJ000000
RISK	Subproject Risk	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Critical	Open	12/30/2022
RISK	Subproject Risk	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	High	Open	09/30/2022
RISK	Subproject Risk	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Medium	Open	12/30/2022
▼ Subproject	4					PRJ000000
RISK	Subproject Risk	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Medium	Open	09/15/2021
RISK	Subproject Risk	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	Medium	Open	08/26/2021
▼ Subproject	5					PRJ000000

Financials

A Page 1

Mayo Clinic Standard Program Status Report

Report run on: December 05, 2022

Capital/Expense	Estimated	Approved	Prior Spent to Date	Current Spent to Date
Example Program	m			
Project Capital	\$7,000,000	\$7,000,000	\$3,000,000	\$3,500,000
Project Expense	\$8,000,000	\$8,000,000	\$4,325,000	\$5,000,000
Total	\$15,000,000	\$15,000,000	\$7,550,000	\$20,944,995
▼ Subproject 1				PRJ000000
Project Capital	\$0	\$0	\$0	\$0
Project Expense	\$1,500,000	\$1,500,000	\$1,000,000	\$1,000,000
Total	\$1,500,000	\$1,500,000	\$1,000,000 _{10/20}	\$1,000,000
▼ Subproject 2				PRJ000000
Project Capital	\$0	\$0	\$0	\$0
Project Expense	\$3,000,000	\$3,000,000	\$1,800,000	\$2,000,000
Total	\$3,000,000	\$3,000,000	\$1,800,000	\$2,000,000
▼ Subproject 3				PRJ000000
Project Capital	\$0	\$0	\$0	\$0
Project Expense	\$1,000,000	\$1,000,000	\$400,000	\$500,000
Total	\$1,000,000	\$1,000,000	\$400,000 10/20	\$500,000
▼ Subproject 4				PRJ000000
Project Capital	\$4,000,000	\$4,000,000	\$2,000,000	\$2,000,000
Project Expense	\$1,500,000	\$1,500,000	\$750,000	\$1,000,000
Total	\$5,500,000	\$29,338,585	\$2,750,000	\$3,000,000
▼ Subproject 5				PRJ000000
Project Capital	\$3,000,000	\$3,000,000	\$1,000,000	\$1,500,000
Project Expense	\$1,000,000	\$1,000,000	\$375,000	\$500,000
Total	\$4,000,000	\$4,000,000	\$1,375,000	\$2,000,000

Program Metrics

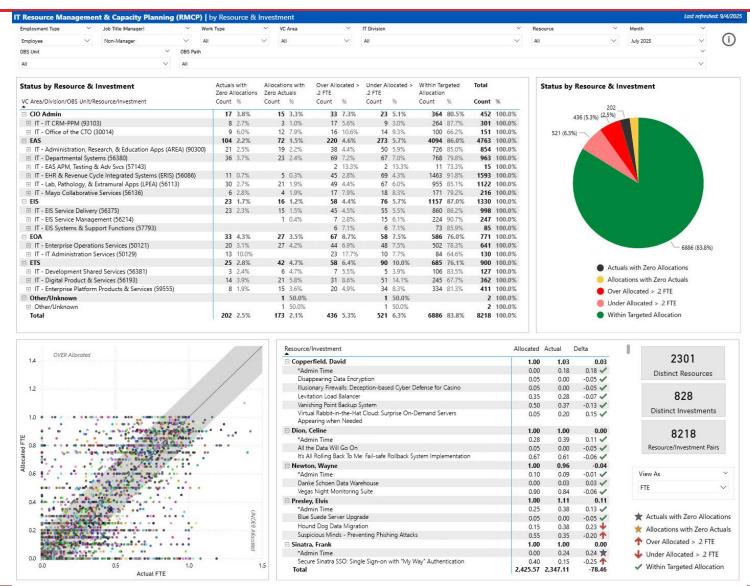
	∭ Met	trics			
Description	Benefit Type	Baseline	Target	Current	Met Req.
Program Metric	Increase Efficiency	16 hours	30 seconds		In Progress
Program Metric	Increase Efficiency	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do		In Progress
▶ Digital Pathology Tissue Registry Digitization					PRJ000000
Subproject Metric	Create Novelty / Discovery	0	1,300,000	0	In Progress
Subproject Metric	Increase Efficiency	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do	30 seconds	2.5 seconds	Yes
Subproject Metric	Increase Efficiency	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut qua.	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor	Yes
▶ Digital Pathology AI Suite Program - DP AI Suite					PRJ000000
Subproject Metric	Create Novelty / Discovery	0	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Dolor purus non enim praesent elementum facilisis leo vel.	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Dolor purus non enim praesent elementum facilisis leo vel. Leo a diam sollicitudin tempor id eu nisl. Quam pellentesque nec nam aliquam sem et tortor consequat. Sollicitudin tempor id eu nisl nunc mi ipsum. Congue quisque egestas diam in arcu.	In Progress

MAYO CLINIC

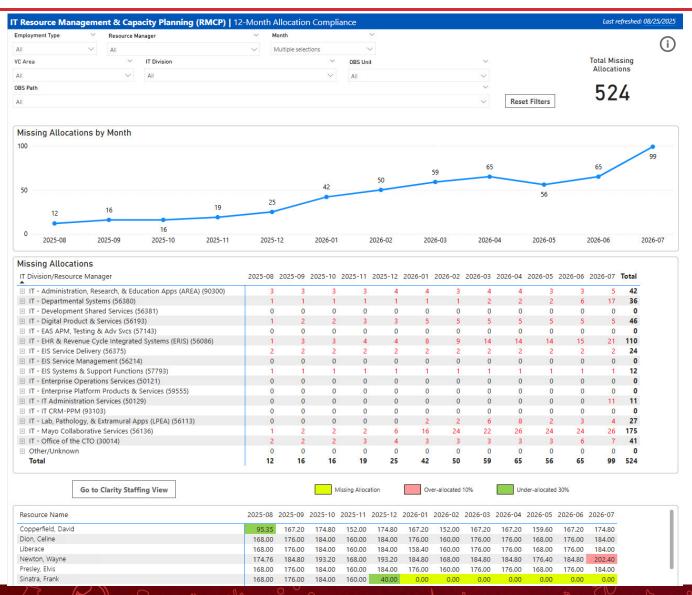
Renae Shellum, Jen Baird, Sheila Stejskal



Resource Management & Capacity Planning



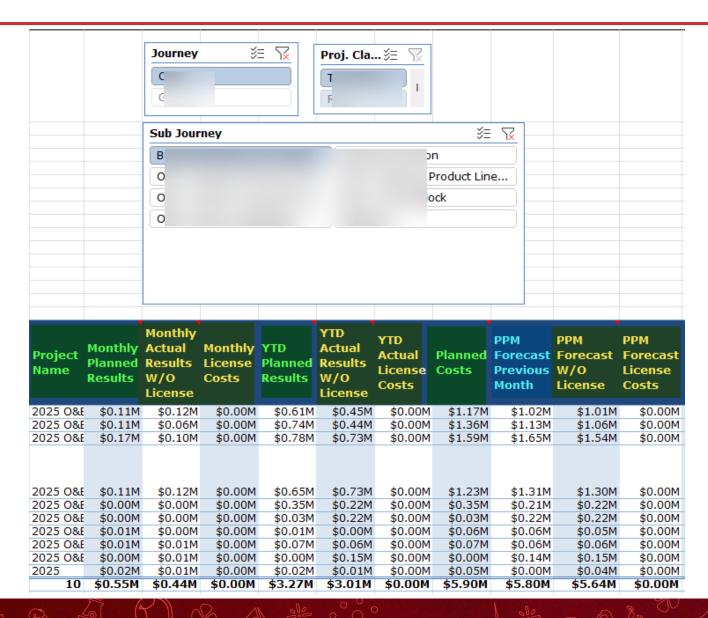
12-Month Allocation Compliance

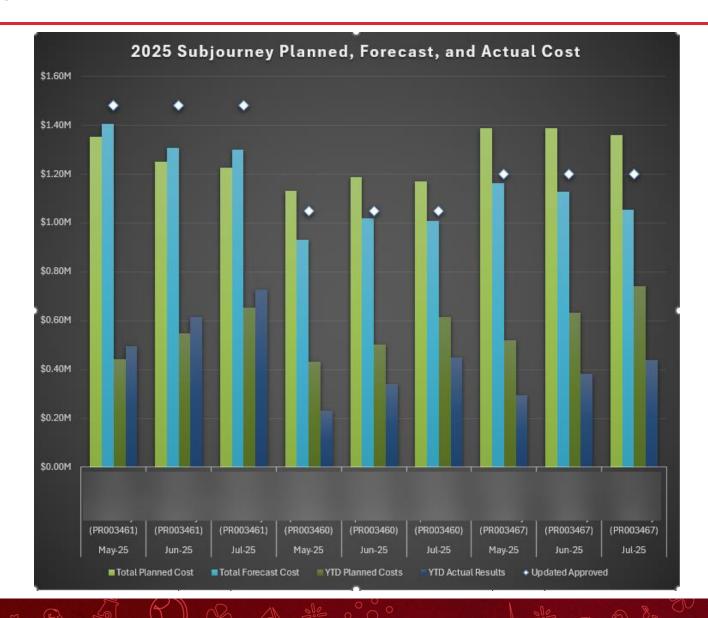


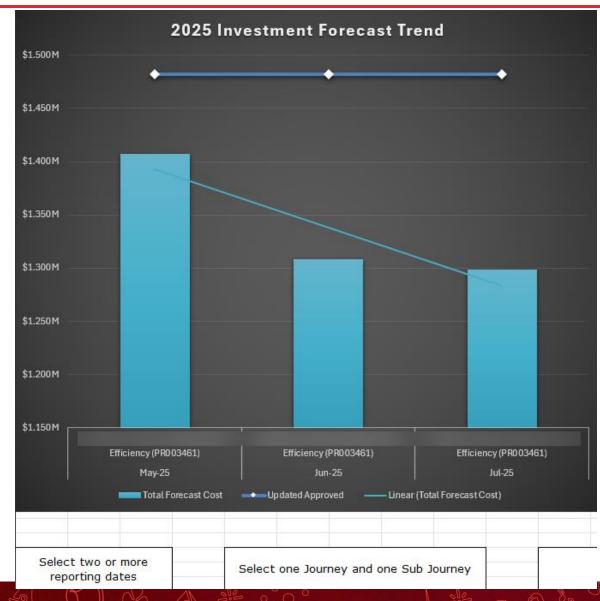


Paul Baumberger







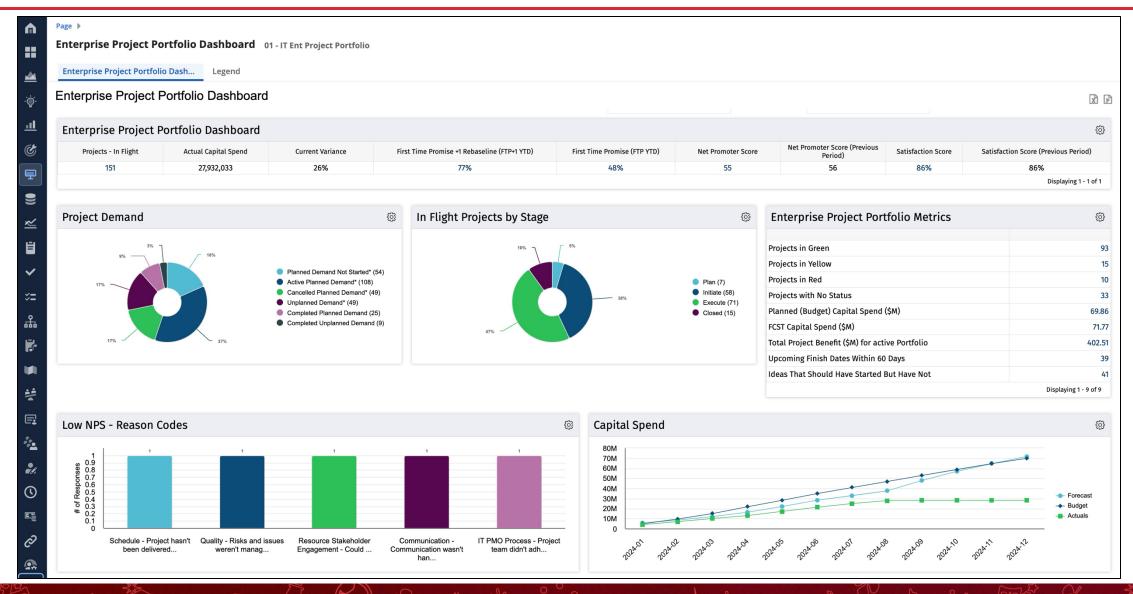


Other Client Examples

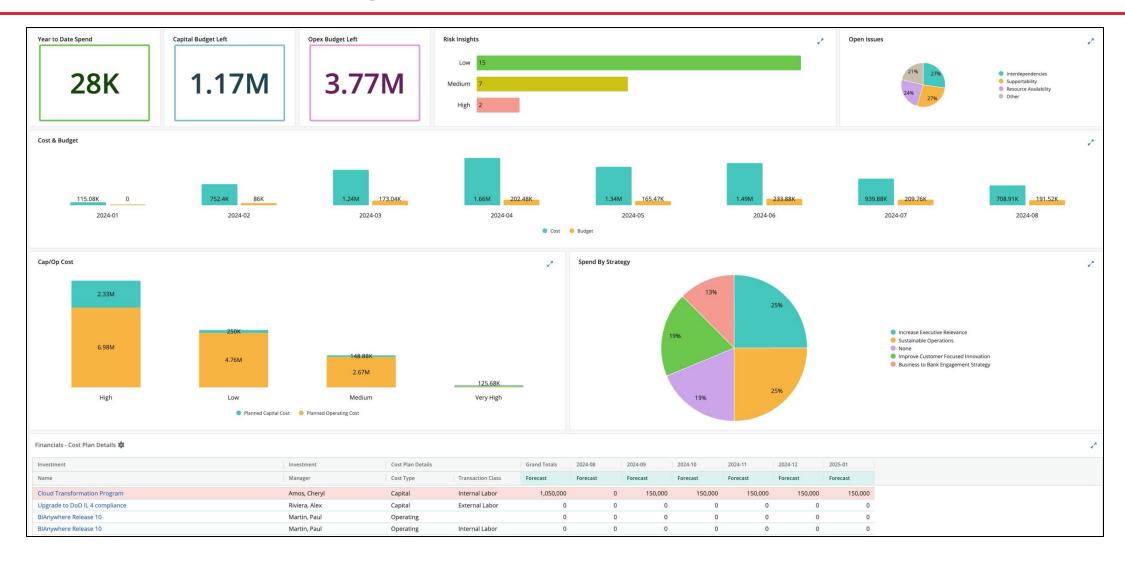
Lulu Wang / Ross Hensel



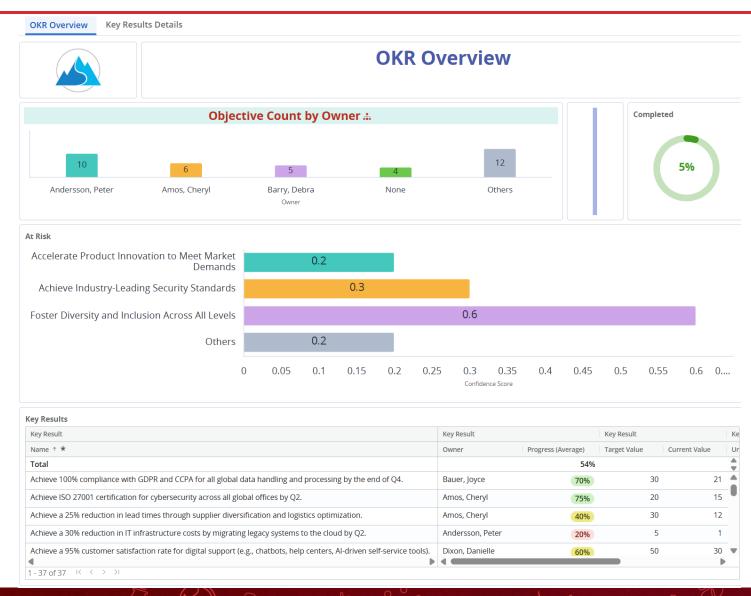
Portlet Based – PMO Dashboard



Canvas with Widgets



New Reporting Workspace



New Reporting Workspace

OKR Overview

Key Results Details

Objective

Name

Accelerate Product Innovation to Meet Market Demands

Confidence Score

20%

Owner

Andersson, Peter

Strategic Imperative

Drive Innovation and Product Leadership

Key Results

Key Result									Key Result		Ke
Name ↑ *	Owner	Progress	Start	Start Value		Target	Target Value		Current Value		Un
Achieve a customer satisfaction (CSAT) score of 90% for newly launched products.	Carmen, Ed	38%	May 18, 2023		10	May 18, 2023		90	4	40	Ind sa
Collaborate with 5 new research institutions to co-develop technologies by the end of the year.	Carmen, Ed	60%	Dec 5, 2023		0	Dec 5, 2023		5		3	Ne
File 10 new patents for cutting-edge technologies in Al and machine learning by the end of the year.	Carmen, Ed	70%	May 18, 2023		0	May 18, 2023		10		7	Ne
Launch 5 new product features or services in key verticals (e.g., Al, cloud, cybersecurity) by the end of Q4.	Andersson, Peter	80%	May 18, 2023		0	May 18, 2023		5		4	Ne
Reduce product development time by 20% through the implementation of agile methodologies by Q2.	Amos, Cheryl	40%	May 18, 2023		0	May 18, 2023		20		8	%

PowerBI Paginated Report

				AC Upp	grades for P	(SA24-0	6555)				
Budget ID:	SA24-	6555	Budget Group:	Bluffton	Business Owner:	Alyoune,	Presented By:				
Current Gate: 0 Location:			Bluffton		Applies to RTU's 6, 7, 8 and 9. Current age of units range from 14-16 years. New units will be upgraded						
Calc Tier:	Tie	r 1	Project Type:	Social Impact	Project Description			roof to have the return air enter farther um right next to each other). Discharge of			
Selected Tier:	Tie	r 1	Brand:	DOTS	Description		tead of metal ducting to disburse				
	Ye	ar	Budget	Forecast				g area improving worker moral and			
	202	24	\$0	\$0				sings incurred from maintenance			
Capital Planning	20	25	\$0	\$700,000	Business			scations, flour is introduced into the units the possibility of premature unit failure.			
r idiiiiig	20	26	\$0	\$0	Purpose		•				
	Tot	tal	\$0	\$0							
Project Life	(years):	Payback	of 20 years	NPV ('000s): \$0							
Capital	Full Capita	l Required	I	\$700,000							
	Start-up (o	ne-time)		\$0	Commba Chain						
_	Non-Startu	ıp (one-tin	ne)	\$0	Supply Chain Impacts						
Expense	Fixed Asset	t Write-off	s (one-time)	\$0							
	Annual Cos	sts (during	steady state)	\$0							
Other	Software a	s a Service	(SaaS)	\$0	Investment	2025 Capital Plan					
Other	Working Ca	apital*		\$10,000	Offset						
		capital + Spar									
				n Member		Downtime for installation Reside personals to conflict	Incation				
	*From Cashflow Capital Tab (working capital + Sp Team Role Eng - Project Manager Eng - Procurement		Turner, 09		T 2 D!	Rigging new units to rooftop location Roof/Structure evaluation					
Eng - Procureme	nt		Eng - Procuremen	t 0%	Top 3 Project Risks /						
					Mitigation						

AC Unexpedient for Processing (\$A24_6555)

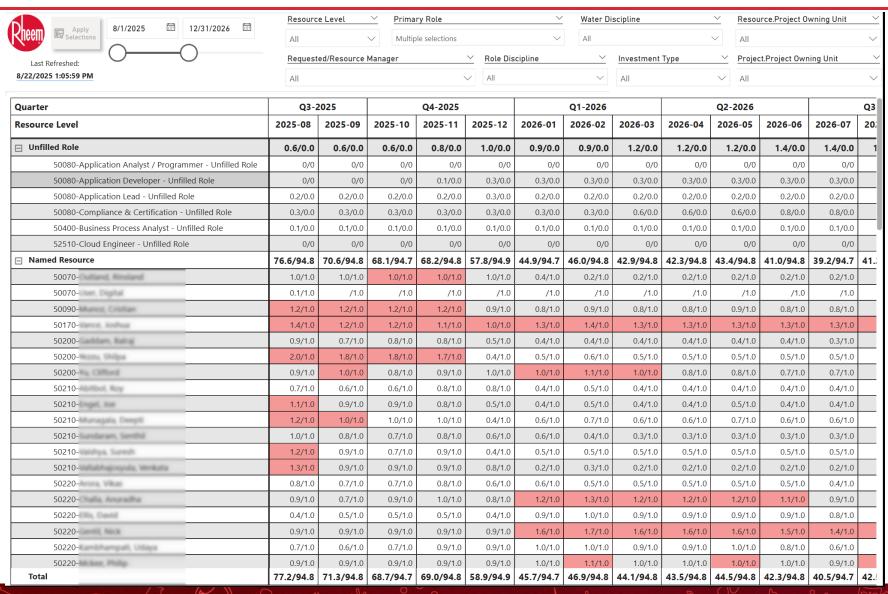
Tableau Report



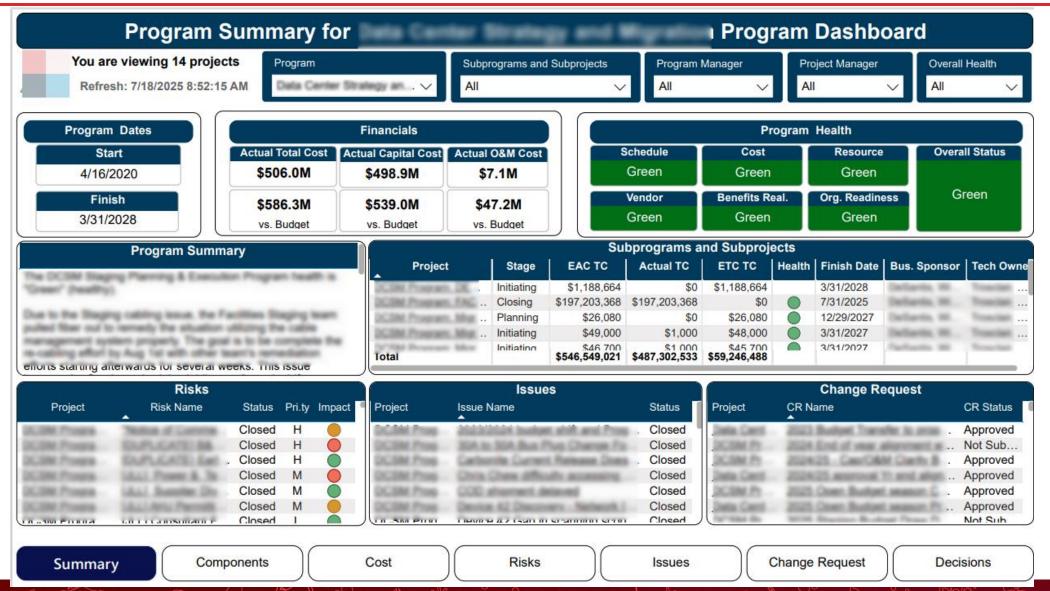
Waterline

				admap (Y/N)	~	Water Team	~	Primary Role		Resourc	e Level	✓ Proje	ct. Primary I	Business Uni	t ×
Apply 8/1/2025		12/31/2025		Select all		Multiple select	ions ∨	Multiple select	tions ~	All		✓ Multi	ple selection	ns	~
\sim				(Blank)		Project Work :	Status V	Water Discipline		Investme	Investment Type		ct. Project 0	~	
Last Refreshed: 8/22/2025 1:05:59 PM Monthly Tot	al	Quarterly		No Yes									,		
8/22/2025 1:05:59 PM Monthly Tot	al .	Quarterty	Avg	163	Multiple selections V					All		∨ All			
Waterline by	Т		Period	2025-08			2025-09				2025-10				2025-11
Waterinie by			Water	US RES R8	vD.		US RES PM	US RES R	งก		US RES PM	US RES RE	υn		US RES PM
Primary Role			Team	OS RES RE			OS REST W	OS RES RE			OS RES I W	OS KES KE			OS REST III
Investment	Seq	Kickoff	Finish	Data	Project	Reliability	Project	Data	Project	Reliability	Project	Data	Project	Reliability	Project
				& Analytics	Engineer	Engineer	Management	& Analytics	Engineer	Engineer	Management	& Analytics	Engineer	Engineer	Management
				-				-				-			
Resource Total Capacity				1.0	10.0		2.0		10.0	3.0	2.0	1.0	10.0	3.0	2.0
NPI Capacity				-0.1	7.3		1.0		7.3	1.7	1.0	1.0	7.4	1.7	1.0
Resource Total Demand				0.7	4.3			0.7	4.5	2.4		0.7	4.6	2.4	
Resource Demand				0.7	3.5			0.7	3.5	2.2		0.7	3.8	2.3	
Role Demand					0.8				1.0	0.3			0.8	0.2	- 10
Resource Availability (Need)			10.10.1.10.007	-0.8	3.0		1.0		2.8	-0.7	1.0	0.3	2.8	-0.7	1.0
00597-	1		12/31/2027	0.1		0.4		0.1		0.4		0.1		0.4	
00694-	1		12/10/2026	0.1	0.0	0.2		0.1	0.0	0.2		0.1	0.0	0.2	
01371-	1	6/20/2025	9/16/2027	0.1	0.8			0.1	0.8	0.2		0.1	0.8	0.2	-
	2	6/20/2025	7/28/2028	0.1	0.3	0.4		0.1	0.3	0.4		0.1	0.3	0.4	
00332-	2		7/15/2027	0.1		0.4		0.1		0.4		0.1		0.4	
00915-	2		7/1/2027												
01257-	2	4/8/2025	11/5/2027		0.5				0.5				0.5		
00564-	3	4/6/2023	10/22/2026	0.1	0.5	0.4		0.1	0.5	0.4		0.1	0.5	0.4	
00574-	3		5/31/2029	0.1		0.4		0.1		0.2		0.1		0.3	
00950-	3		9/3/2027	5		0.2		0.1		0.2		0.1		0.5	
01341-	3		11/3/2028												
00942-	4		12/10/2027			0.1				0.1				0.1	
00948-	4		9/30/2027												
02164-	4		7/1/2027												
01238-	4	6/4/2025	7/17/2028			0.1				0.2				0.2	
01319-	4	6/17/2025	10/29/2029												
00903-	5		7/13/2028												
01216-	5		6/30/2028												
	+	<u> </u>	-						-			-	-		 ,

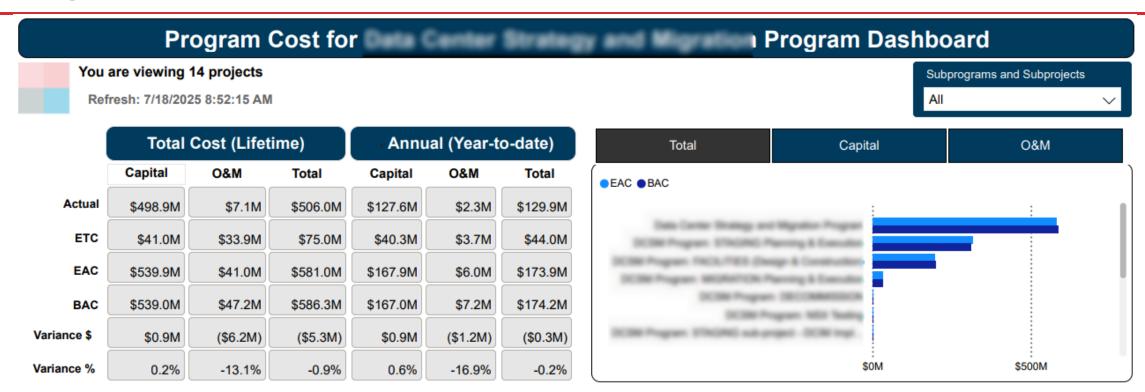
Demand vs Capacity



Program Summary

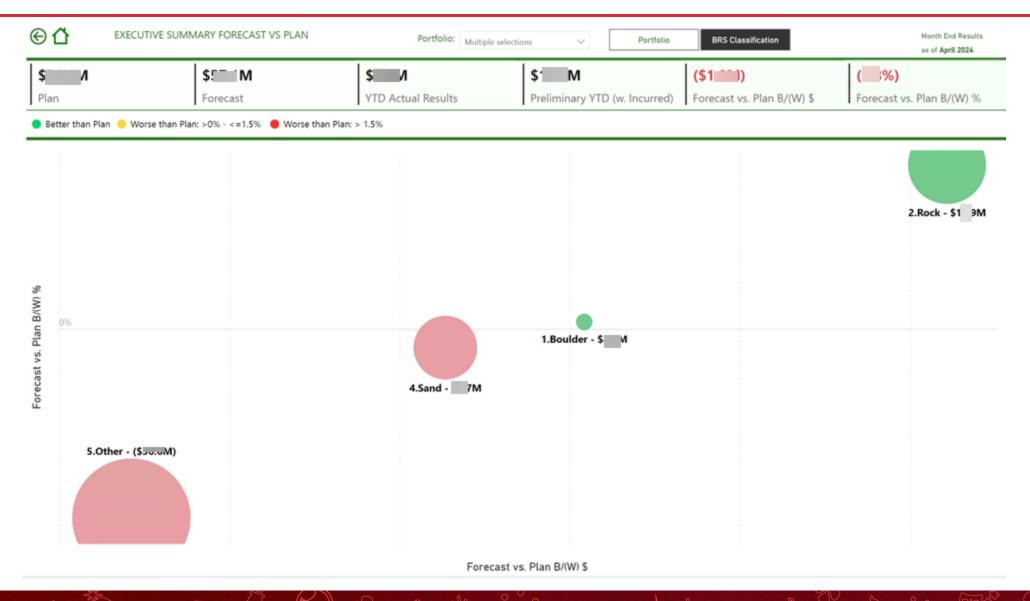


Program Cost

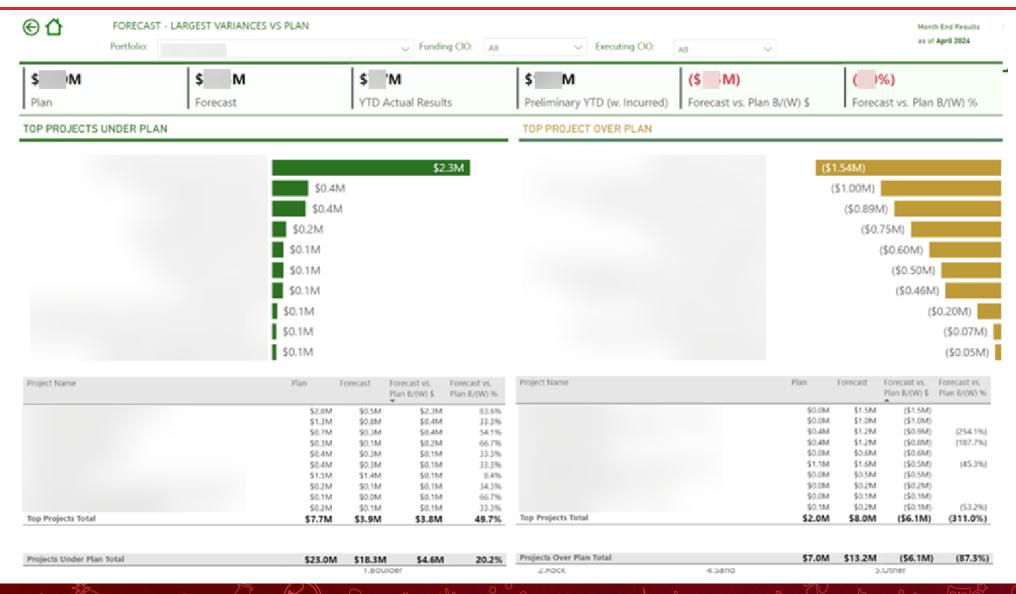


Subprograms and Subprojects														
Project	Project ID	Actual TC	EAC TC	ETC TC	BAC TC	Var \$ TC	Var % TC	Actual YTD	EAC YTD	ETC				
CAN Proper SALAMANA	PR4-901142	\$0	\$1,188,664	\$1,188,664	\$1,188,664	\$0	0.0%	\$0	\$0					
DCSM Program FRCIL/TRS (Design & Constituti	PRU-001138	\$197,203,368	\$197,203,368	\$0	\$198,916,604	(\$1,713,236)	-0.9%	\$12,549,119	\$12,549,119					
ICSN Program. Migration - Clim sub-project	PRJ-001688	\$0	\$26,080	\$26,080	\$0	\$26,080		\$0	\$7,824					
DCSM Program Migration - Databases (Produc-	PRU-001742	\$1,000	\$49,000	\$48,000	\$0	\$49,000		\$1,000	\$14,500	\$				
ICSV Program Migration - Databases (NGL)	PRJ-001724	\$1,000	\$46,700	\$45,700	\$0	\$46,700		\$1,000	\$14,500	\$				
DCSR Program Migration - Operated sub-project	PRU-001667	\$2,000	\$28,080	\$26,080	\$0	\$28,080		\$2,000	\$9,824					
SCSM Program Migration - RNL & NCS	PRJ-001741	\$0	\$42,857	\$42,857	\$0	\$42,857		\$0	\$42,857	\$				
Total		\$487,302,533	\$546,549,021	\$59,246,488	\$543,783,625	\$2,765,396	0.5%	\$121,672,353	\$152,287,552	\$30,6				

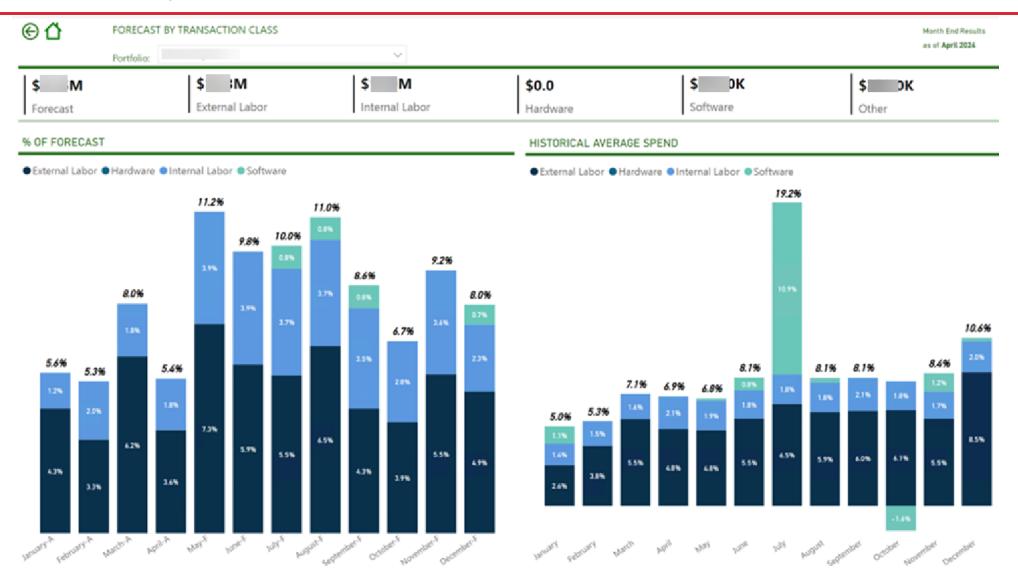
Forecast vs Plan



Forecast vs Plan - Largest Variance



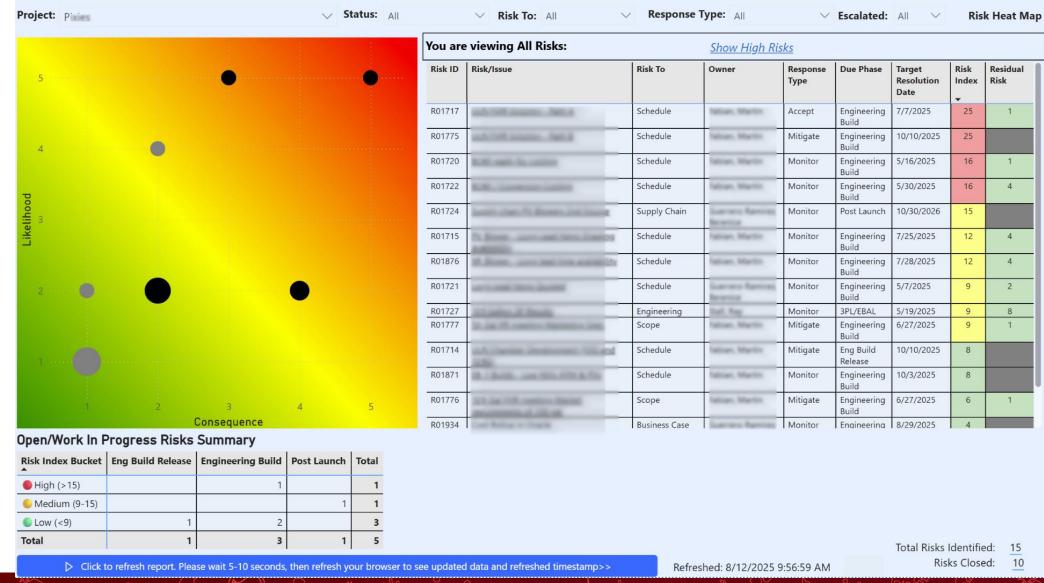
Forecast by Transaction Class



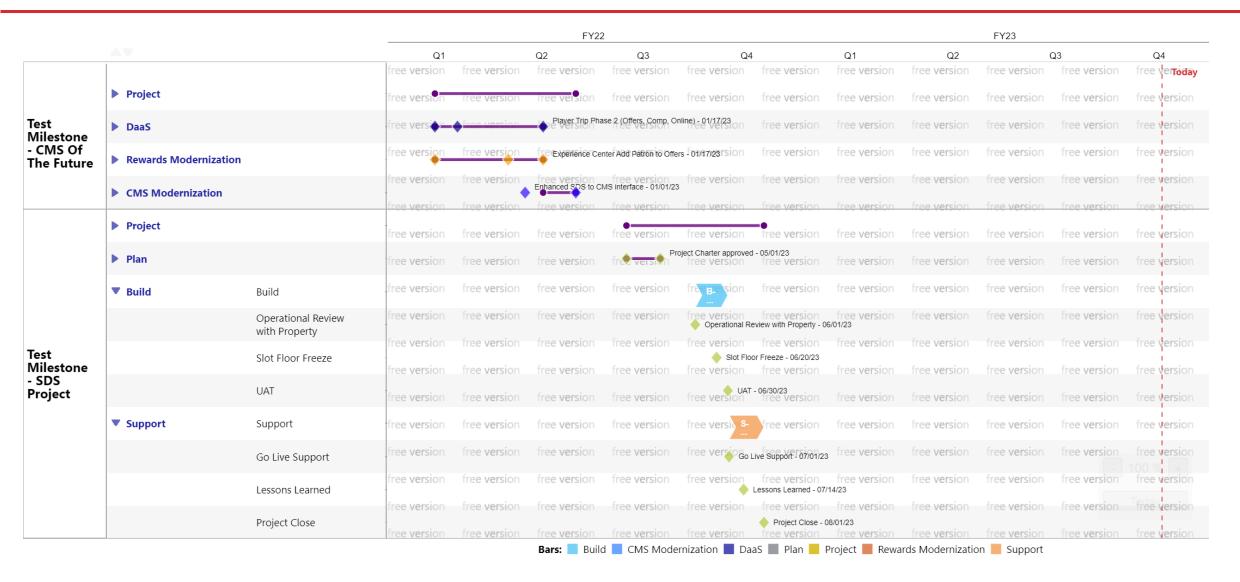
YTD Spend vs Plan



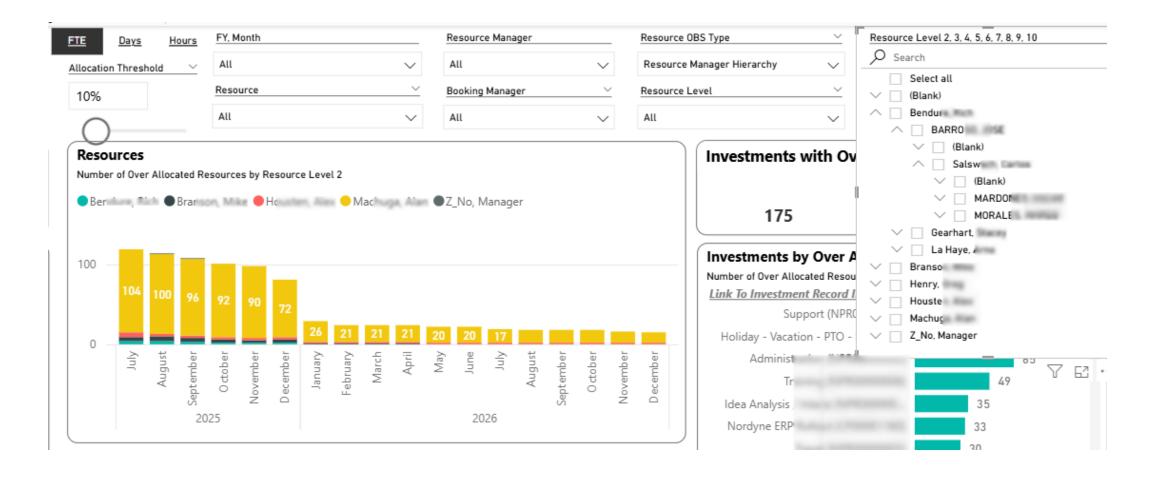
Risk Heatmap



Gantt – Project/Phase



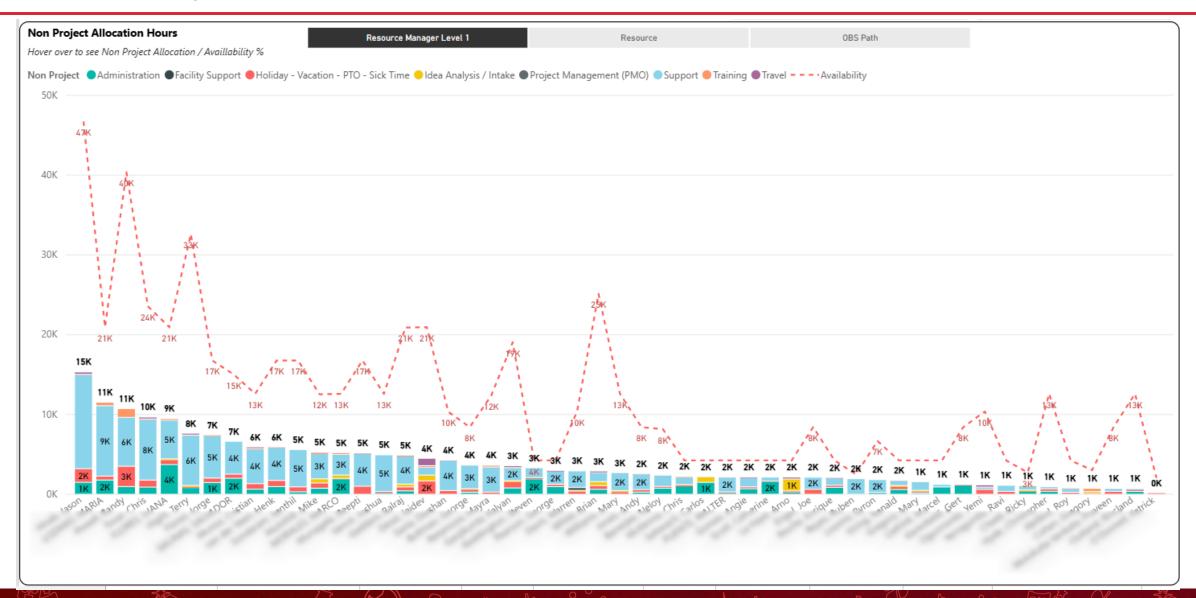
Resource Manager Hierarchy



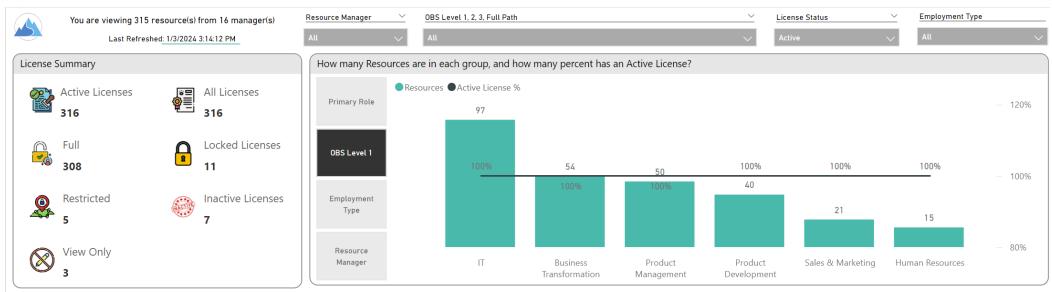
Under Allocated %



Non Project Allocation Hours



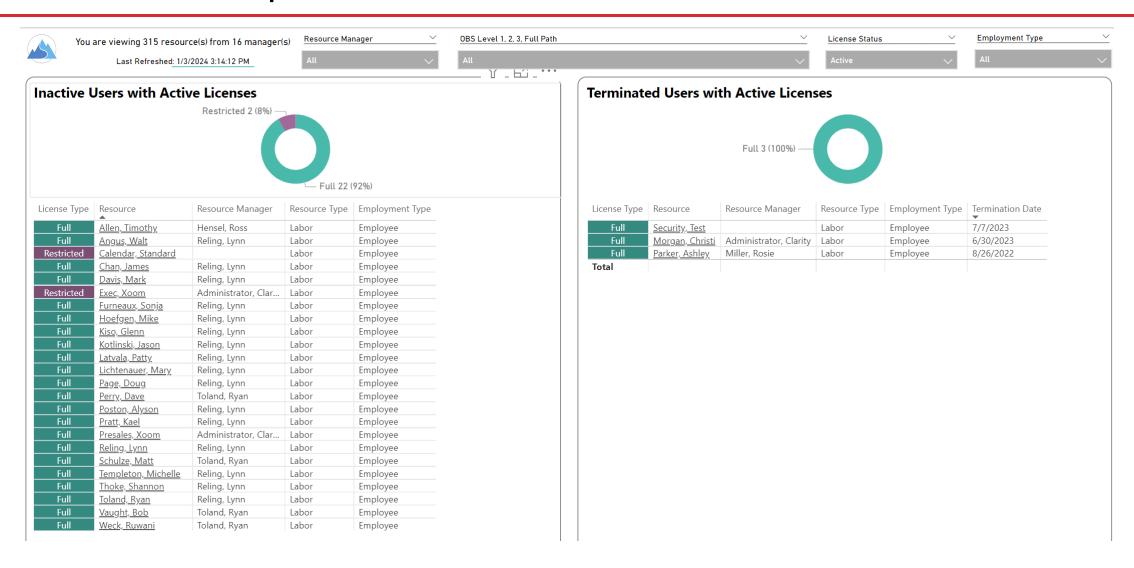
License Tracking



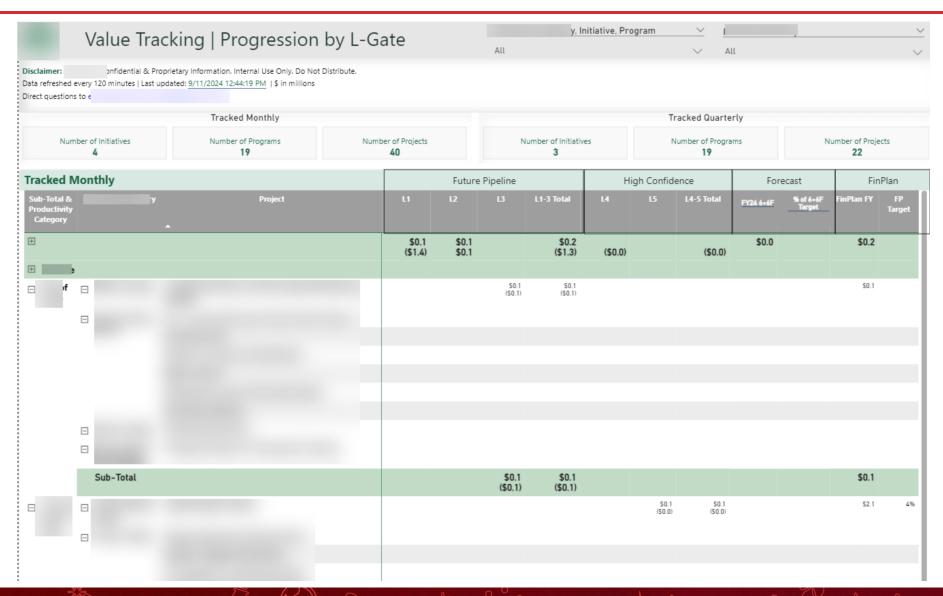
OBS Level 1	Full	Restricted	View Only	Total
+ IT	97			97
Business Transformation	54			54
Product Management	50			50
Product Development	40			40
Sales & Marketing	21			21
Human Resources	15			15
Total	308	5	3	316

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

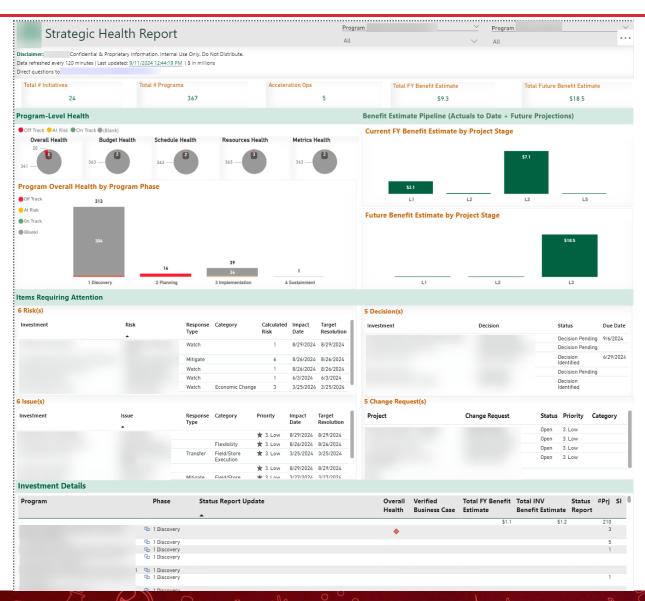
License Exception



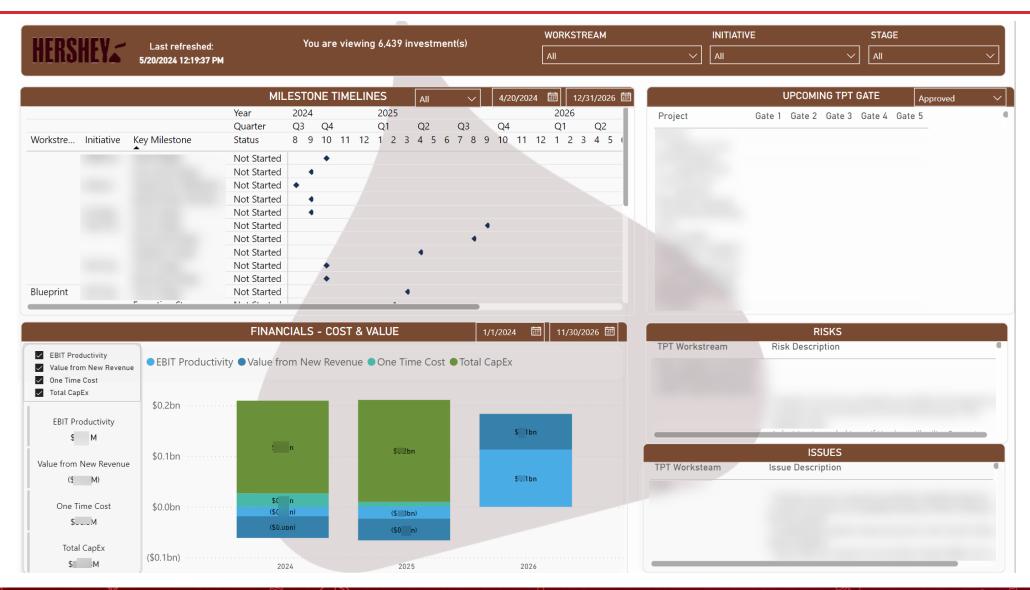
Value Tracking by Stage Gate



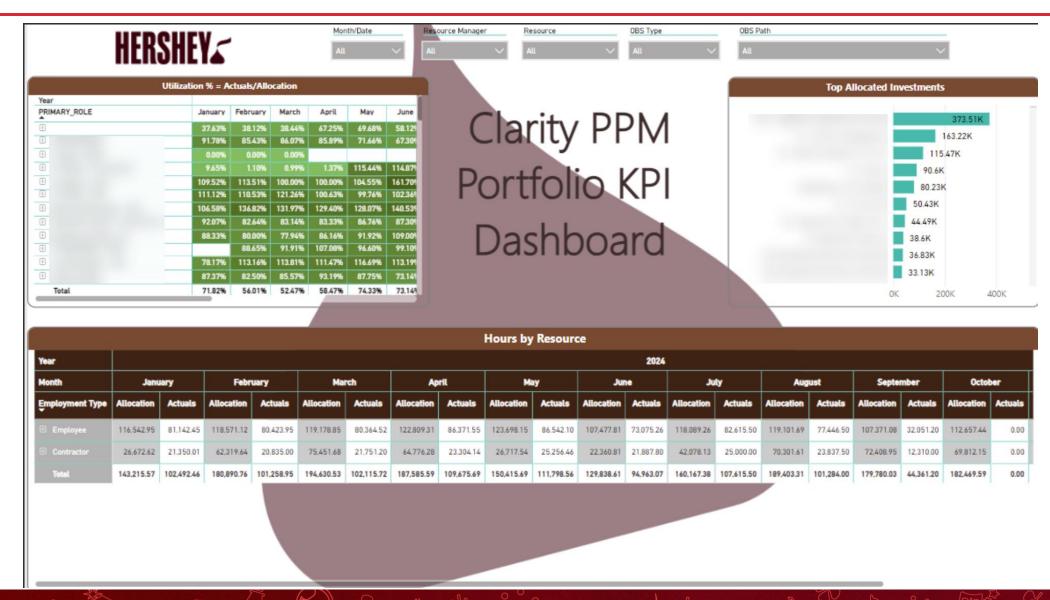
Strategic Health



Hierarchy Dashboard



Allocations vs Actuals



Additional Resources

- Rego Webinars:
 - Rego's Free Clarity Power BI Dashboards: A Deep Dive Part 1
 - Rego's Free Clarity Power BI Dashboards: A Deep Dive Part 2
 - Winning Reporting Strategies
- Rego Free Trainings:
 - <u>PowerBI</u> (repeats monthly)
 - Jaspersoft (repeats monthly)
- RegoXchange
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 - Filter for: _ PowerBI Report ▼ Related Modules ▼ theBasiX ▼

Questions?



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- Click on Course or Training
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- Class Name = regoUniversity
- Course **Description**
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- Date Completed = Today's Date
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