



Clarity Dashboards and Reports: Examples and Strategies You Can Use

Your Guides:
Ross Hensel & Lulu Wang

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Agenda

- Introduction
- Client Reporting Examples
- Modern UX Reporting Examples
- Questions
- Additional Resources

Introductions

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

Agenda and Rules



Headliners:

- CPS Energy – Melanie Boshart
- Cambia – Sandra Pfeiffer
- Hershey's – Danielle Weynberg
- Canada Life – Vasan Thurai Rajah
- HCA Healthcare – Kelly Watson
- Mayo Clinic – Jessica McNeill

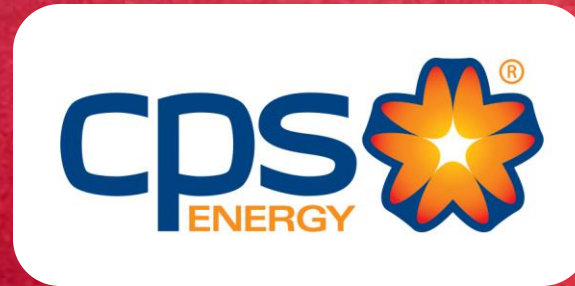


Each Presentation:

- 5 – 8 minute overview
- Couple of audience questions
- If you like a report, then jot down the name / company and connect with them afterward

Client Reporting Examples





Melanie Boshart

Time Entry Categories

TIME ENTRY CATEGORIES	WHAT IT MEANS	EXAMPLES	EIT RESOURCE MANAGER ALLOCATION TIP
Administration	Hours not associated with your profession or role. Activities include team engagement events, townhalls, and CPS Energy approved volunteer opportunities.	• Townhall type meetings • Team engagement activities • CPS Energy sponsored volunteer events	Administration hours for each team member should be consistent if team and 1:1 schedules are similar in how staff are managed.
Incident	Addressing issues or problems that were not planned	• Addressing a service disruption or unplanned outage • Root cause investigation • Issue / resolution analysis	Although incidents cannot be planned, it is recommended to look at historical team member actuals to establish a forecasted monthly hours estimate
Leave	Paid Time Off (PTO) that has been submitted	• Planned vacation • Sick Time	Discuss planned time off once monthly with team members in 1:1s and have Clarity open to make updates to allocations in real-time.

Time Entry Categories

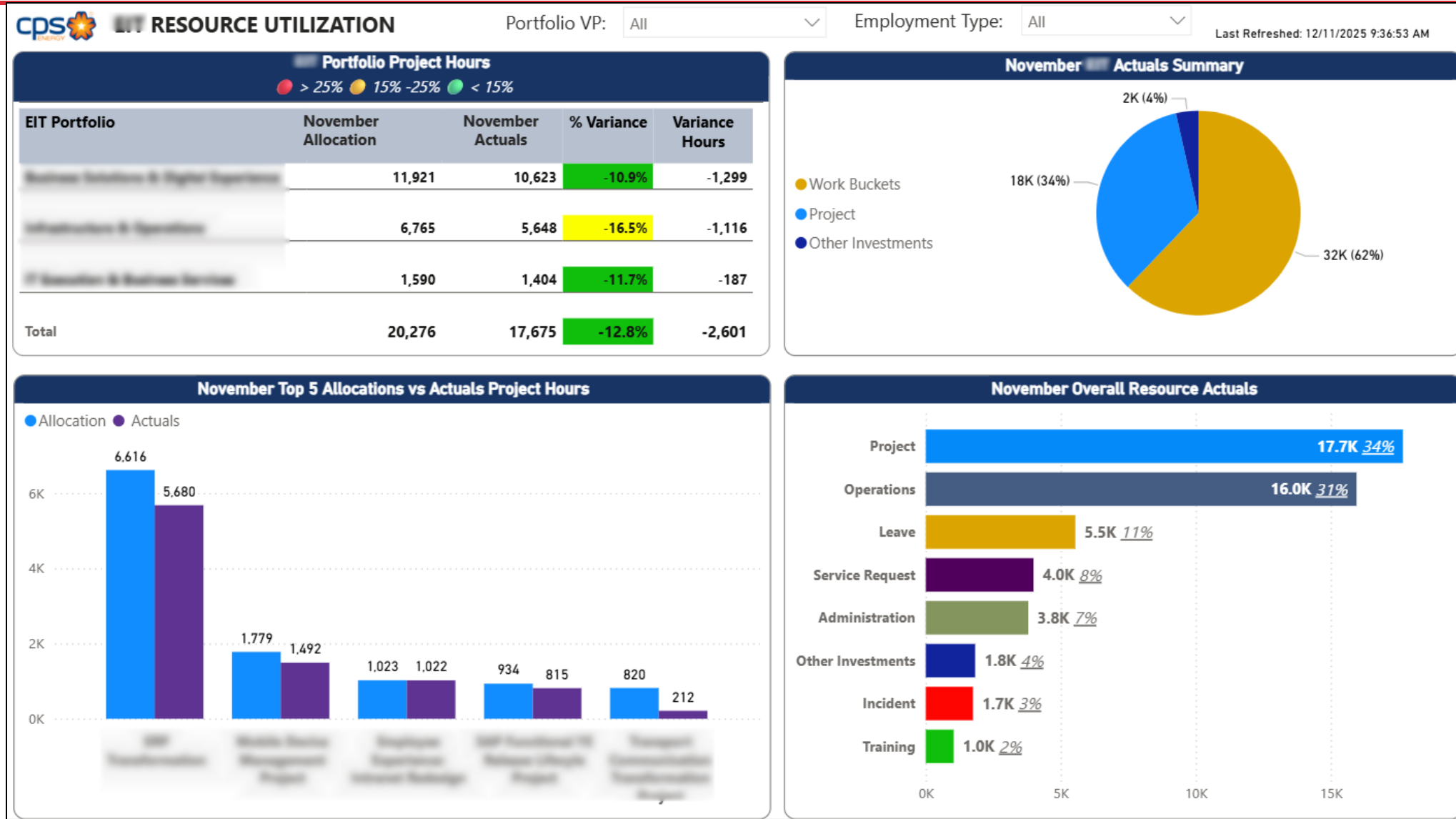
TIME ENTRY CATEGORIES	WHAT IT MEANS	EXAMPLES	EIT RESOURCE MANAGER ALLOCATION TIP
Operations	Role or team related activities specific to your team's job function at CPS Energy	Planned non-project related patching, upgrade, outage or other IT role-based work	Discuss planned operations support once monthly with team members in 1:1s and have Clarity open to make updates to allocations in real-time.
Service Request	Work associated with an assigned ServiceNow ticket requiring team member support	All type of IT work included in the EIT ServiceNow service catalog	Establish a baseline estimate for managing service requests based on role of team member and discuss assigned tickets once monthly in 1:1s.
Training	Activities related to professional development and education approved by CPS Energy	- SuccessFactors assigned training - Conferences - Approved CPSE professional development training (virtual or in-person)	Discuss upcoming training once monthly with team members in 1:1s and have Clarity open to make updates to allocations in real-time.

Time Entry Categories

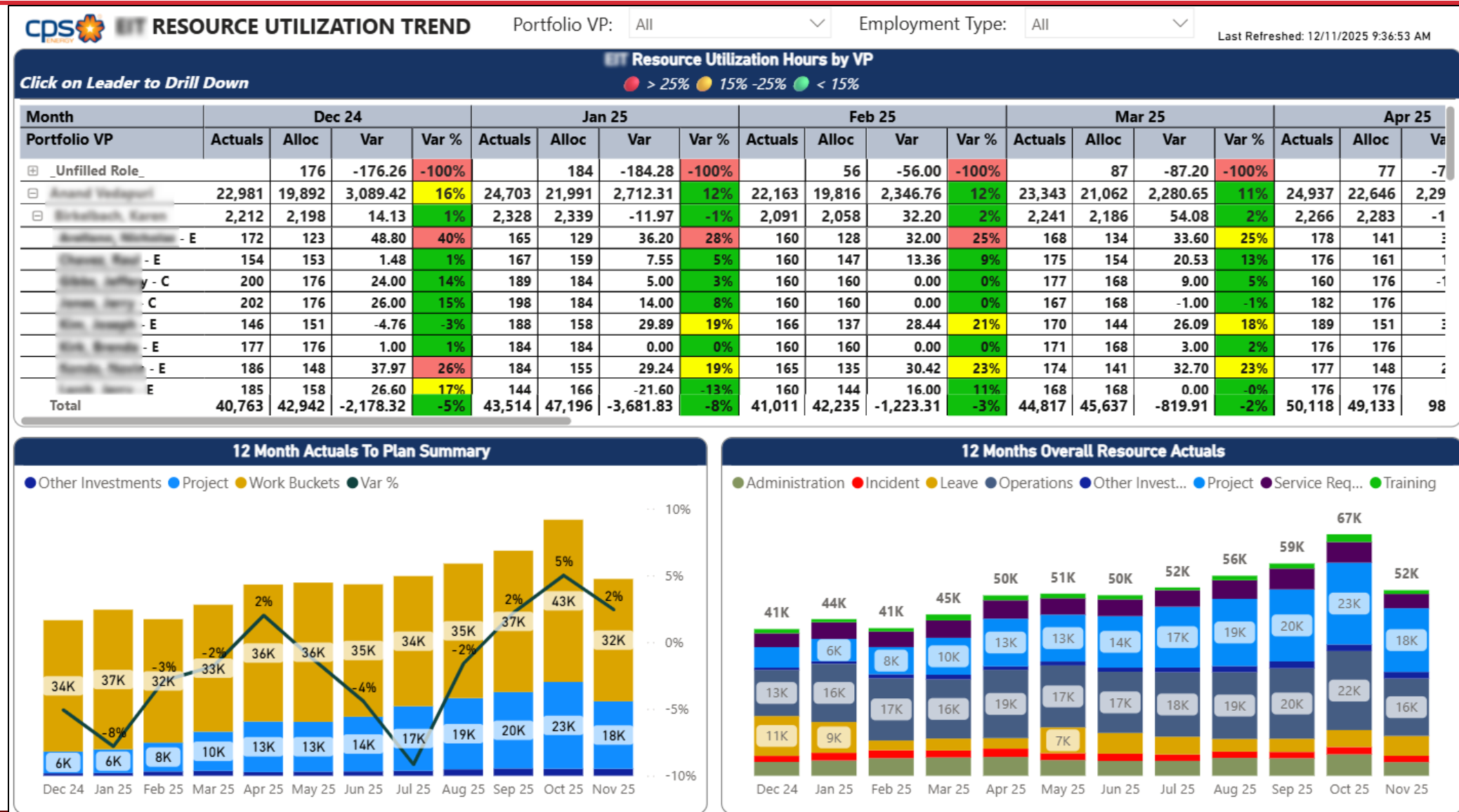
TIME ENTRY CATEGORIES	WHAT IT MEANS	EXAMPLES	EIT RESOURCE MANAGER ALLOCATION TIP
Project Assignments (Unique by Project)	Formal Project assignments team members have been designated to support in their EIT role	• AARRS Implementation Project • ERP Transformation • Data Presentment Project	Monthly allocations are entered by the Project Manager. Review with your team member once monthly to maintain alignment to assignments and actuals.

Resource Utilization

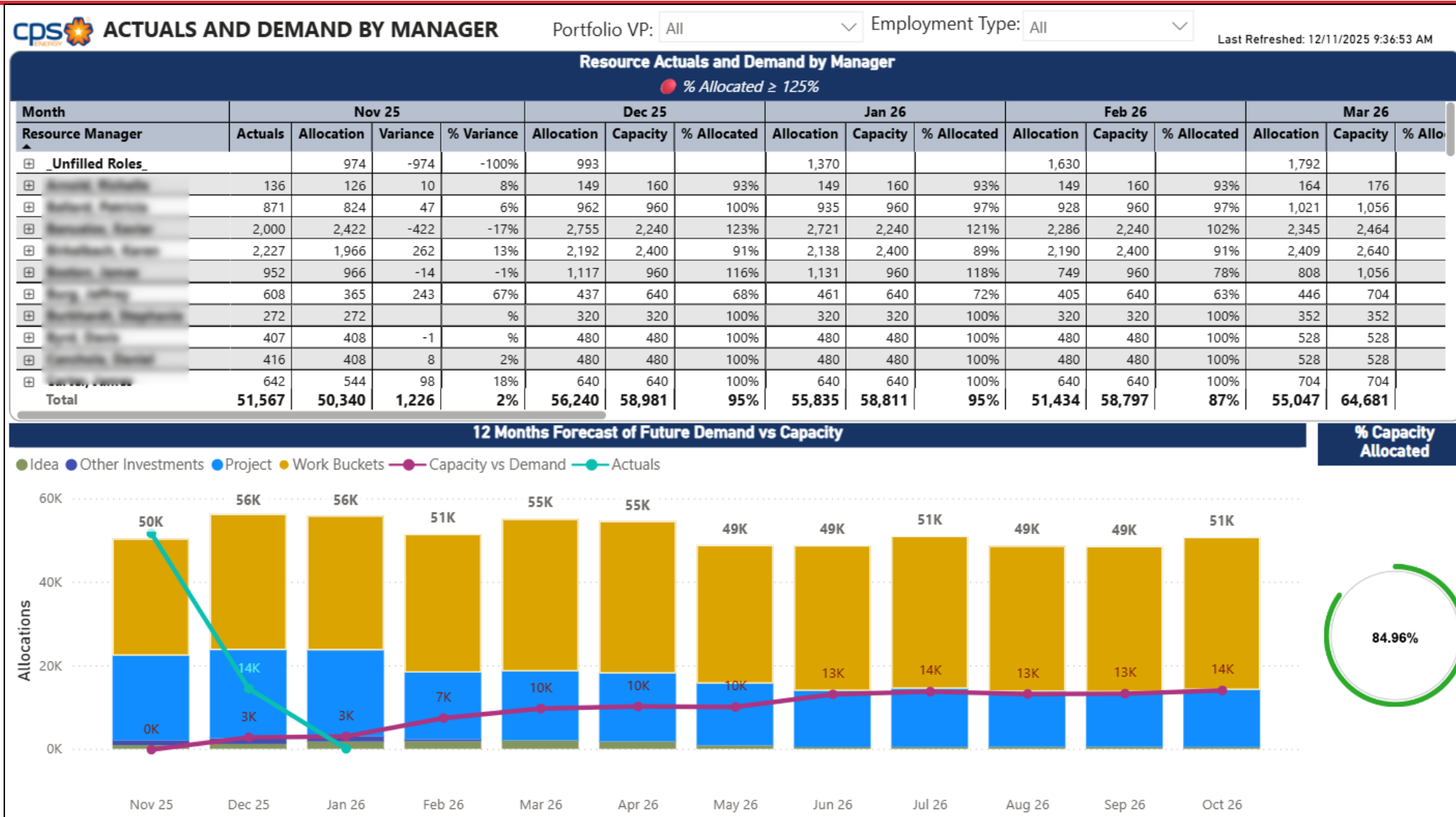
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Resource Utilization Trend



Actuals and Demand by Manager



Project Timeline and Financials

	FY2027 TODAY												FY PORTFOLIO FINANCIALS			
	Q1			Q2			Q3			Q4			YTD Actuals	Budget	Approved Funding	Latest Estimate
	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Jan-27				
Strategic Office Program 1	Milestone 1: Charter Approved Smart Thermostat Project Milestone 2: Move to Plan Stage Gate												\$ 0	\$ 0	\$ 0	\$ 0
Transport Services Program 3	Transport Communication Transformation Project												\$ 6,712,185	\$ 10,851,488	\$ 10,851,488	\$ 10,783,385
	Communications Infrastructure Lifecycle Project												\$ 271,812	\$ 1,081,732	\$ 1,081,732	\$ 1,152,337
	Active Fiber Monitoring Lifecycle Project												\$ 228,575	\$ 75,000	\$ 75,000	\$ 198,000
Wireless Services Program	AARRS Implementation (Rural Area Radio) Project												\$ 81,187	\$ 40,000	\$ 40,000	\$ 81,187
	AARRS P25 BDA Lifecycle Project												\$ 112,154	\$ 121,487	\$ 121,487	\$ 161,485
	Field Wireless Network Operations Lifecycle Project												\$ 204,214	\$ 1,158,487	\$ 1,158,487	\$ 1,162,787
	✓	Milestone 1 - Replace 385 radios with new 425 L... Smart Grid Network Expansion Lifecycle Project											\$ 292,236	\$ 490,000	\$ 490,000	\$ 492,759
	Private LTE Implementation Business Case Project												\$ 0	\$ 0	\$ 150,000	\$ 0
	✓	AARRS Portable Radio Requests Lifecycle Project											\$ 1,000	\$ 2,040,000	\$ 2,040,000	\$ 2,040,000
	✓	AARRS Site on Wheels Lifecycle Project											\$ 38	\$ 40,000	\$ 40,000	\$ 38,000
	AARRS Resiliency MFW Expansion Project												\$ 2,000	\$ 290,000	\$ 290,000	\$ 290,000
	Montgomery Rd DAS & BSM Project												\$ 0	\$ 300,000	\$ 300,000	\$ 300,000
Standard Project Lifecycle Project ✓ = PM Assigned to Lifecycle ◆ = Major Milestone																

EIT Resource Utilization Trend Export

Resource and Capacity Management | Data updated 8/12/26

loading view Mobile layout Open semantic model Ask a question Explore Text box Shapes Buttons Visual interactions Refresh Duplicate this page

cps EIT RESOURCE UTILIZATION TREND Portfolio VP: All Employment Type: All Last Refreshed: 8/12/2026 3:15:48 PM

EIT Resource Utilization Hours by VP
 Click on Leader to Drill Down
 > 25% 15% -25% < 15%

PERIOD_NAME	Jul 26				Jun 26				May 26				Apr 26				Mar 26			
Portfolio VP	Actuals	Alloc	Var	Var %	Actuals	Alloc	Var	Var %	Actuals	Alloc	Var	Var %	Actuals	Alloc	Var	Var %	Actuals	Alloc	Var	Var %
Unfilled Role	14,507	16,852	-2,345.65	-14%	13,005	15,928	-2,922.81	-18%	11,991	14,448	-2,456.24	-17%	11,428	15,138	-3,709.86	-25%	13,061	12,647	414.66	3%
		800	-799.80	-100%		450	-450.00	-100%		269	-268.80	-100%		124	-124.06	-100%		130	-129.97	-100%
	27,475	22,293	5,181.67	23%	26,445	21,182	5,263.37	25%	24,914	20,280	4,634.69	23%	23,803	20,817	2,986.78	14%	25,197	21,653	3,543.47	16%
	10,602	9,678	924.59	10%	10,306	9,042	1,263.91	14%	9,509	8,379	1,129.40	13%	8,348	8,858	-509.98	-6%	9,774	9,199	574.38	6%
	5,721	5,702	19.48	0%	5,251	5,442	-191.36	-4%	5,042	5,179	-137.45	-3%	5,217	5,436	-218.62	-4%	5,623	5,693	-69.97	-1%
Total	58,304	55,324	2,980.28	5%	55,008	52,045	2,963.11	6%	51,456	48,555	2,901.59	6%	48,797	50,372	-1,575.74	-3%	53,654	49,322	4,332.56	9%

Period	Other Investments		Project		Work Buckets		Total	
	Actuals	Var %	Actuals	Var %	Actuals	Var %	Actuals	Var %
Jul 26	1,507	28%	19,627	-20%	37,171	26%	58,304	6%
Jun 26	1,479	31%	18,253	-21%	35,277	26%	55,008	6%
May 26	1,887	77%	16,710	-24%	32,859	29%	51,456	6%
Apr 26	1,748	56%	16,659	-27%	30,390	14%	48,797	-3%
Mar 26	1,921	66%	18,406	-9%	33,328	20%	53,654	9%
Feb 26	1,703	41%	16,480	-11%	30,176	20%	48,359	8%
Jan 26	1,494	24%	14,280	-26%	31,599	28%	47,373	5%
Dec 25	1,957	62%	14,006	-30%	30,370	22%	46,333	1%
Nov 25	1,562	50%	12,991	-25%	26,227	22%	40,780	2%
Oct 25	1,663	22%	16,568	-23%	34,839	24%	53,070	4%
Sep 25	1,774	41%	14,825	-24%	30,987	20%	47,586	2%
Total	20,155	42%	192,590	-22%	382,796	22%	595,540	4%

Month	Administration	Incident	Leave	Operations	Other Investments	Project	Service Request
Jul 26	4,641	1,972	4,665	20,869	1,507	19,627	4,033
Jun 26	4,707	1,310	3,641	20,084	1,479	18,253	4,409
May 26	3,950	1,117	3,587	18,441	1,887	16,710	4,641
Apr 26	3,867	1,066	3,092	17,294	1,748	16,659	4,082
Mar 26	4,655	1,340	4,075	18,295	1,921	18,406	4,161
Feb 26	3,894	1,292	2,381	16,847	1,703	16,480	4,352
Jan 26	3,522	1,106	6,460	15,011	1,494	14,280	3,664
Dec 25	3,875	986	6,701	14,105	1,957	14,006	3,519
Nov 25	3,248	1,348	4,886	12,731	1,562	12,991	3,142
Oct 25	5,336	1,537	4,119	17,429	1,663	16,568	4,470
Sep 25	4,271	1,372	3,252	16,207	1,774	14,825	4,568
Aug 25	4,328	1,361	3,267	15,406	1,463	13,784	4,026
Total	50,294	15,807	50,125	202,719	20,155	192,590	49,067

EIT Resource Utilization Trending - Table Portfolio Actual Hours & 3-Month Forecast Project Actuals and Demand by Manager Project Actuals and Demand by Role Actuals and Demand by Manager



Sandra Pfeiffer

Intake and Delivery Health

Pages
Submission & Review Health
Estimation SLA Compliance
Funding Approval Pipeline
Active Work & Delivery Mo...
Instructions

File Export Share Explore Subscribe Monitor Edit

Instructions

This dashboard provides visibility into the health of the intake, estimation, funding approval, and project delivery processes. The metrics help DTS leaders, engineering managers, and business partners identify delays, bottlenecks, risks, and opportunities for improvement.

Using Filters

Use the **Filters** pane on the right side of the report to narrow results by team, organization, estimator, status, and other available options.

Tip: All visuals are interactive. Selecting a chart, bar, table value, or slicer automatically filters related visuals on the page.

To clear a selection:

- Click the selected item again
- Use the **eraser (Clear Selection)** icon when available

To return to the default report view, clear all selections and filters or use **Reset Filters** icon at the top of the screen.

Tips for Leaders and Managers

- Monitor intake and estimation performance
- Identify funding approval bottlenecks
- Ensure project status reporting remains current
- Review projects reporting schedule, scope, budget, or resource concerns
- Support data-driven conversations and decision-making
- Improve accountability and transparency across teams

Need Help?

Questions about report definitions, calculations, or data quality should be directed to the [DTS Intake and Portfolio Management team](#).

Submission Review and Health

Measures how quickly requests are reviewed after entering DTS Intake.

Key Metrics

- Reviewed On Time:** % reviewed within 7 days of submission
- Complete at Submission:** % submitted with all required information
- Returned for Information:** % needing business follow-up before review
- Avg. Days to Review:** Average review turnaround time

Focus

- Which business areas submit the most incomplete requests?
- Are review delays concentrated by requesting area, coordinator, or delivery team?

Intake Estimation Performance

Measures how quickly requests move through the estimation process.

Key Metrics

- Within SLA:** % estimated within target timeframe
- Warning:** Requests approaching or exceeding the target
- Breach:** Requests significantly overdue
- Avg. Days to Estimate:** Average time to complete an estimate

Focus

- Which teams have the most overdue estimates?
- Which estimators have aging requests?
- Are estimation times improving or declining?
- Are delays driven by capacity constraints or missing responses?

Funding Approval Pipeline

Tracks requests awaiting business funding decisions.

Key Metrics

- Awaiting Funding:** Requests pending approval
- Funded Requests:** Approved to proceed
- Approval Rate:** % of estimates that receive funding
- 180+ Days Pending:** Awaiting approval for 6+ months
- Avg. Days to Funding:** Time from estimate to approval

Important Notes

NDI Data Requests are excluded. Long-open requests may reflect changing priorities or cancellations.

Focus

- Where are approvals delayed?
- Are estimates aging before decisions are made?
- Which areas have the most pending requests?

Active Project Health

Monitors the health of active projects requiring status reporting.

Key Metrics

- Active Projects:** Projects included in reporting
- At Risk:** Projects where Overall status is Yellow or Red
- Missing Status Reports:** No current status update
- Status Distribution:** Portfolio health summary

Important Notes

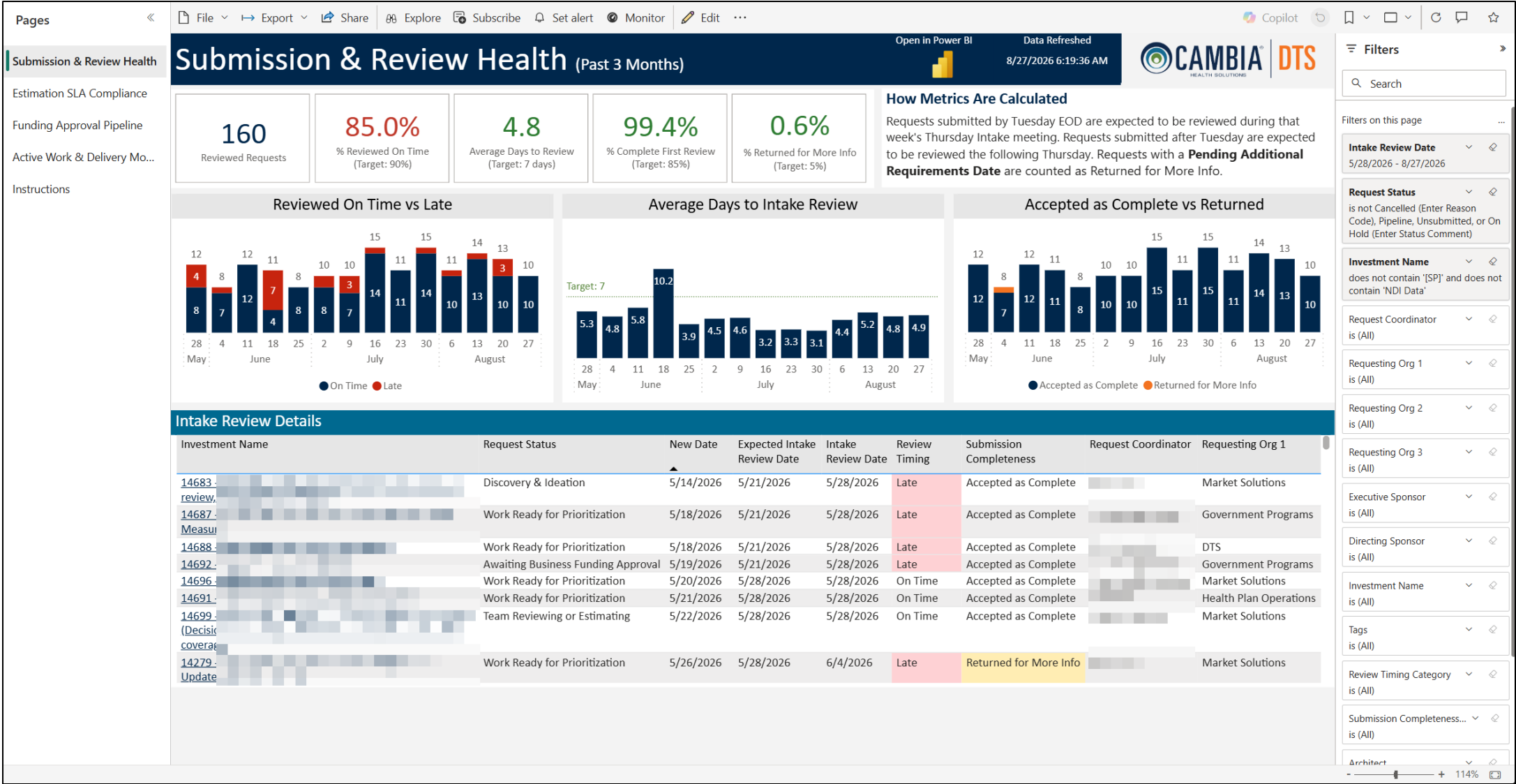
Only projects meeting reporting requirements are included. Newly started or smaller efforts may be excluded

Focus

- Which projects need attention?
- Where are status reports overdue?
- Which areas have the most at-risk work?

127%

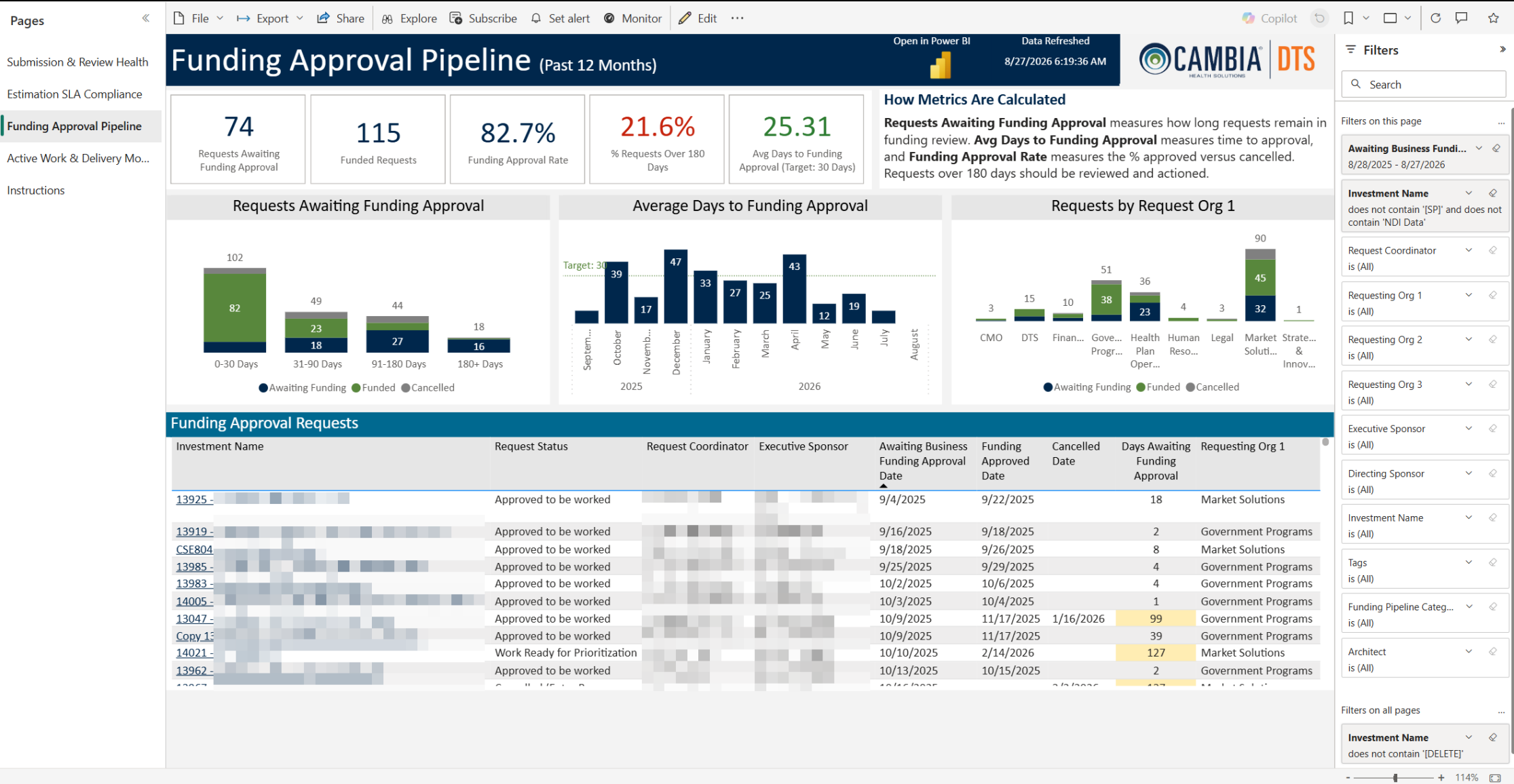
Submission and Review Health



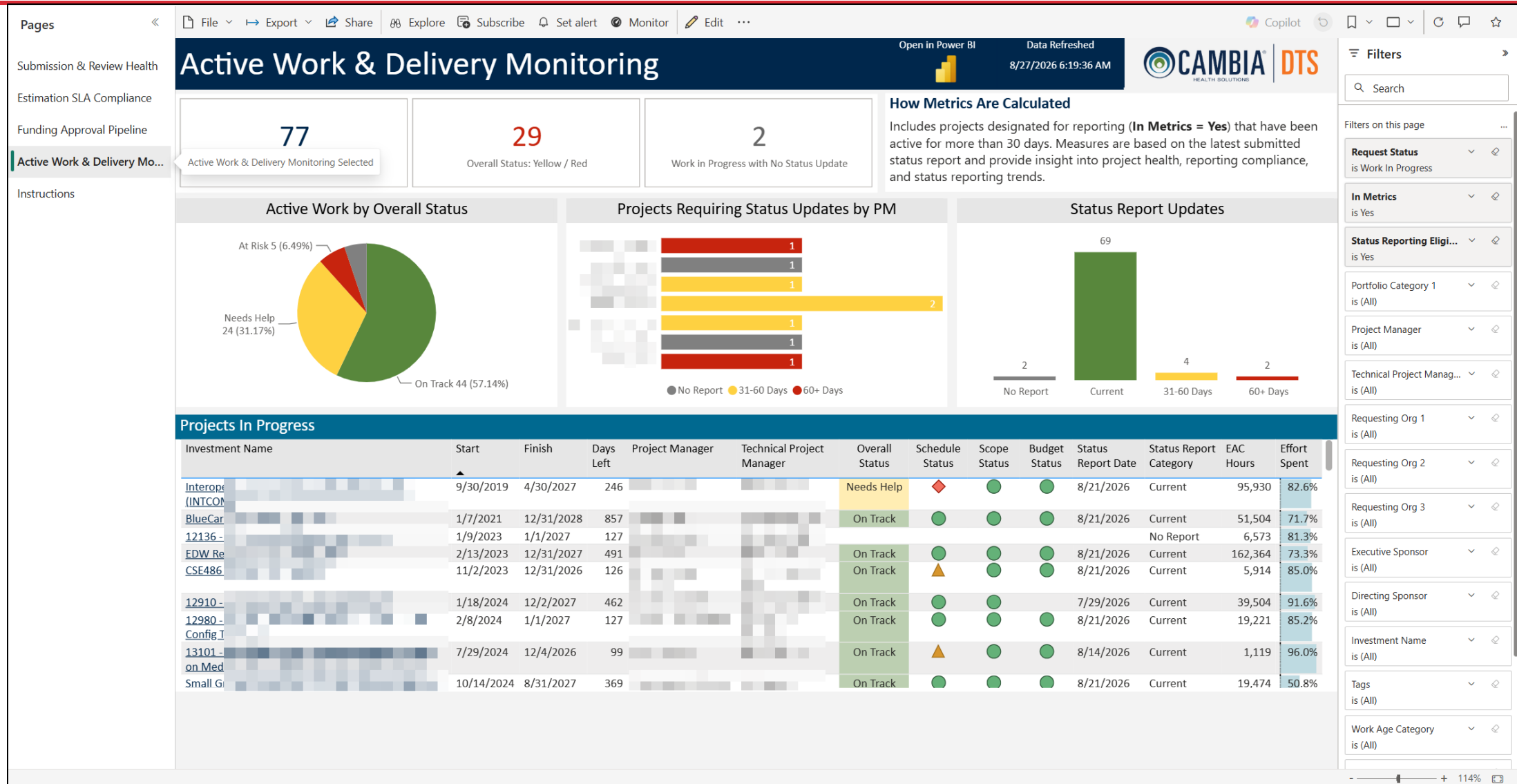
Estimation SLA Compliance



Funding Approval Pipeline



Active Work and Delivery Monitoring





Danielle Weynberg

Timesheet Summary

Timesheet Summary - Week Ending Jan 25

** Select a Week Ending: **

January 25

Selected Week Compliance

KPI Metrics	Total		Agile	HRBP - US	HRBP - US	HRBP - US	HRBP - US	HRBP - US	HRBP - US	HRBP - US	HRBP - US
Timesheets Submitted #, %	90/94, 96%	0/1, 0%	5/5, 100%	3/3, 100%	6/6, 100%	21/21, 100%	4/4, 100%	3/4, 75%	5/5, 100%	30/32, 94%	13/13, 100%

4 Wk Avg Highest Project Actuals (Hours)

Projects
JOB - HRBP - US
Conf - HRBP - US
1H 2 - HRBP - US
RTB - HRBP - US
RTB - HRBP - US

4 Wk Avg Highest RTB Actuals (Hours)

RTB Activities
RTB - HRBP - US
RTB - HRBP - US
RTB - HRBP - US
RTB - HRBP - US
RTB - HRBP - US

Missing Timesheets

Enrique	Talent Acquisition
Anderson	People Analytics
do	Talent Acquisition

4 Wk Avg Individual EE- Over 45 (Hours)

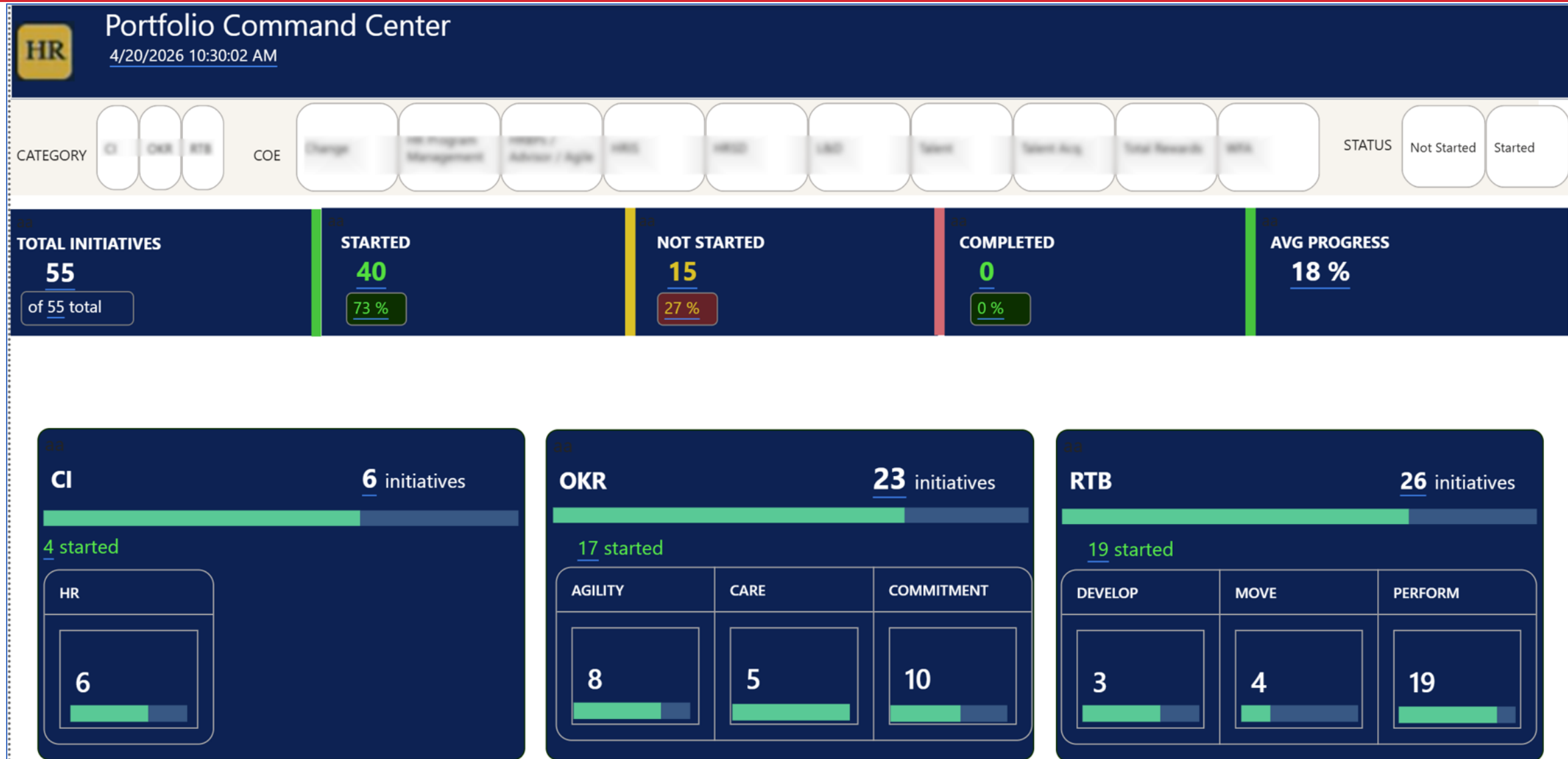
	Team	Avg 4 wk trend (Hours)	Projects Avg 4 wk trend (Hours)	RTB Avg 4 wk trend (Hours)
Jason*		61	48	13
one, Leanna*		54	19	35
Erin*		53	38	15
David*		52	1	51
Rajel, Kasey*		52	22	30
Rosa Estela*		52	6	46
Christine*		52	10	42
Justin*		51	31	20
Sarah*		50	19	32
Christine*		49	2	47
McKenzie*		49		49
z, Candace*		48	1	47
Keith*		47	6	41
Emily*		46	30	17
olleen*		46		46

4 Wk Avg Individual EE- Under 40 (Hours)

Full Name	Team	Avg 4 wk trend (Hours)	Projects Avg 4 wk trend (Hours)	RTB Avg 4 wk trend (Hours)
Lisa		30		30
Natali*		32		32
ley*		34		34
athleen*		34		34
ssa		34	26	9
		34		34
icia*		34		34
		34		34
Kaitlyn*		34		34
xandra*		34		34
ecca*		34		34
ria*		34		34
a*		34		34
n*		35		35
White, William*		35	12	23

Portfolio Command Center

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23

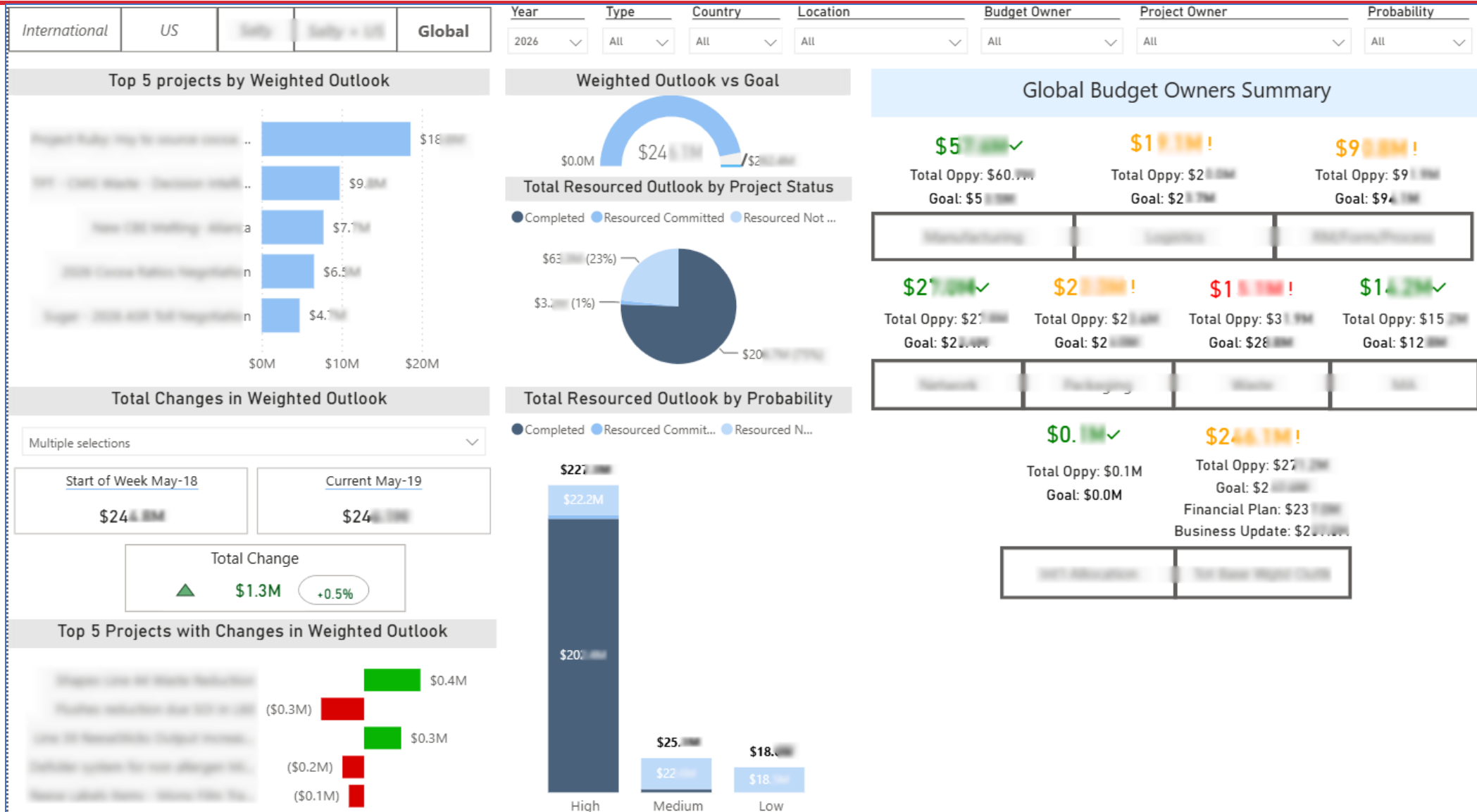
OKR

23 initiatives

17 started

AGILITY		CARE		COMMITMENT	
8	17%	5	33%	10	12%

Financial Overview



Paginated Report

Print the Report Personalization - Charter Report

Milestone Schedule

FEP-1

FEP-2

FEP-3

Installation Start

Operational Date

Close Date

6/26/2025

11/13/2025

4/2/2026

3/15/2026

11/10/2026

1/27/2027

Top 3 Project Risks / Mitigation

1) Failure to not approve this project will lead to missed opportunity to be the first in the industry to commercialize green air purification capability and potentially create IP in this space for future license revenue streams.

2) Consumer testing being completed with natural colors due to timeline. Minimal shelf life testing will be completed. Risk to impact to consumers liking of natural oils and risk to color stability overtime in packaging.

3) Clean room construction delays may impact startup readiness.

Assumptions & Constraints

These goals will be met with no change hardware costs before shipping. Additional costs captured to account for our free shipping threshold within current BOM model.

The main goal type to purchase will be a 12 month term.

The printer will be operational from Monday to Friday at Building 47 on first shift.

Critical Questions to Answer before FEP 2 Gate

How does our core management agreement and business structure hold the with independent unit?

How will natural oils impact price of product?

How the 12th application equipment designed by independent unit satisfy requirements to successfully print 12th unit cap before and after printing?

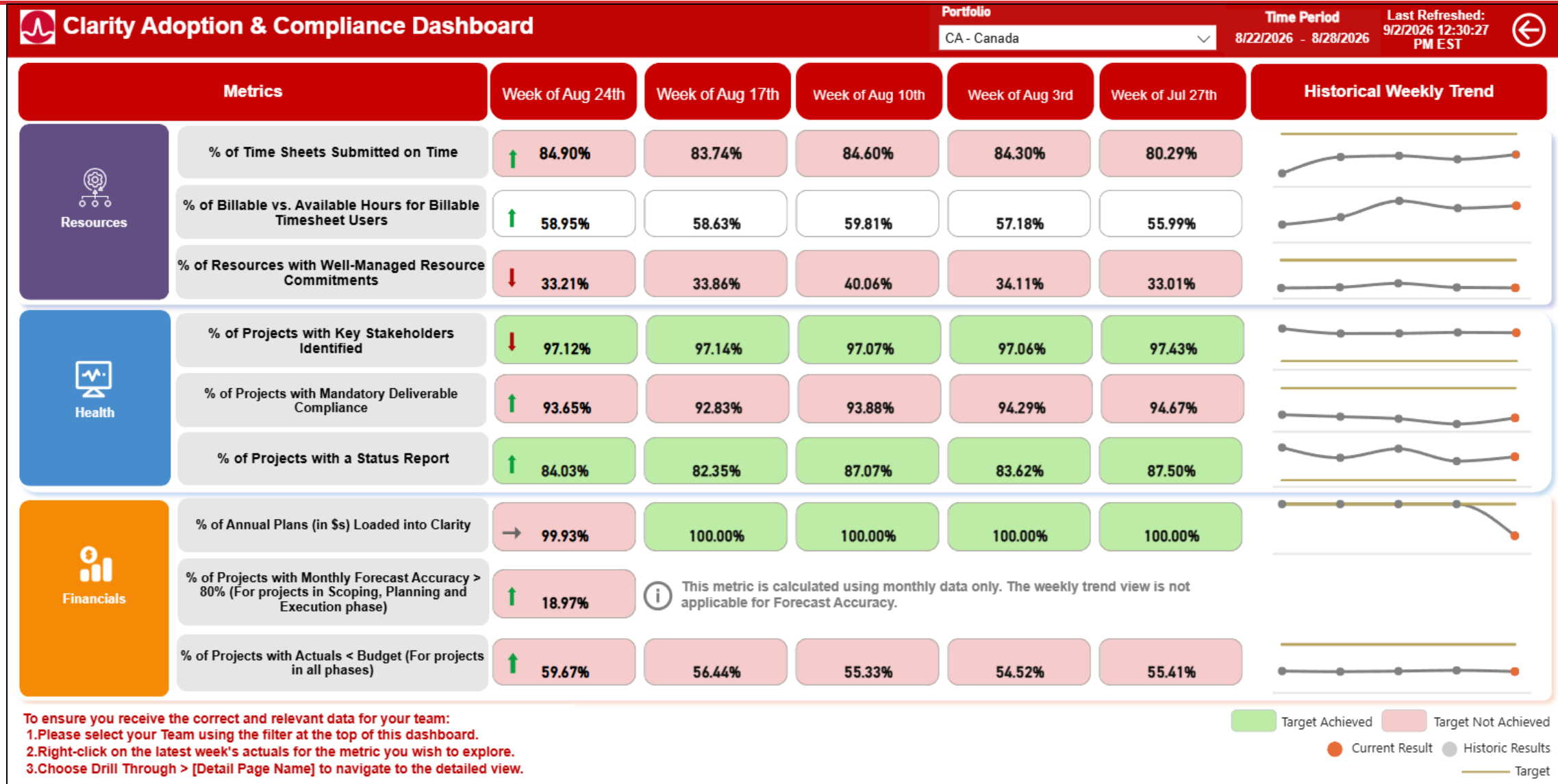
How will natural oils be handled within order management system?

Type	Stakeholder	Signature
Business Sponsor	John Doe	
Business Owner	John Doe	
Project Manager	John Doe Victoria	



Vasan Thuraijah

Adoption and Compliance Dashboard





Kelly Watson

Timesheet Compliance Report



Timesheet Compliance Report - Field

Week of: 9/9/2026

CURRENT REPORTING PERIOD



COMPLIANCE STATUS BY RESOURCE MANAGER

DIV - Manager	This Period	YTD Missed	YTD %
NFL			
Raz, Timothy	●	2	94.44%
NTX			
Holliman, Basil	●	5	86.11%
WFL			
Thomas, Angela	●	1	97.22%

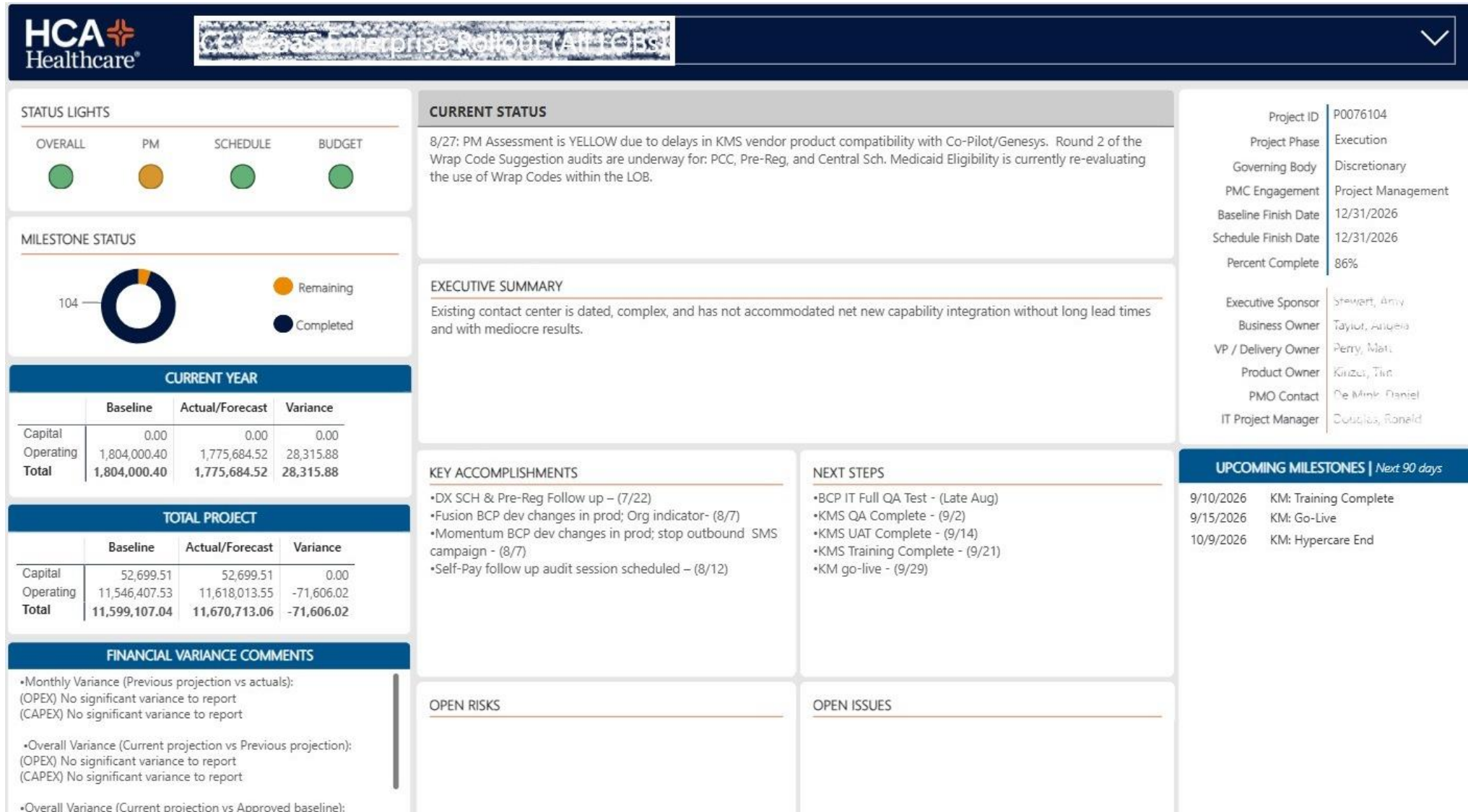
DIVISION HISTORICAL TREND

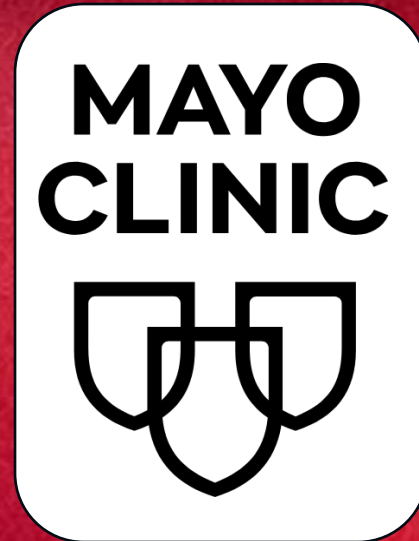
Division	Historical Trend	YTD Avg
CAP		99.23%
CON		99.58%
CWT		98.50%
EFL		99.13%
FWD		99.06%
GCD		99.58%
MAD		99.39%
MTN		99.88%
NCD		99.01%
NFL		99.72%
NTX		97.34%
SAN		98.65%
SATL		98.36%
TRI		99.28%
WFL		99.62%

Let Rego be your guide. **rego**University2026

Project Dashboard

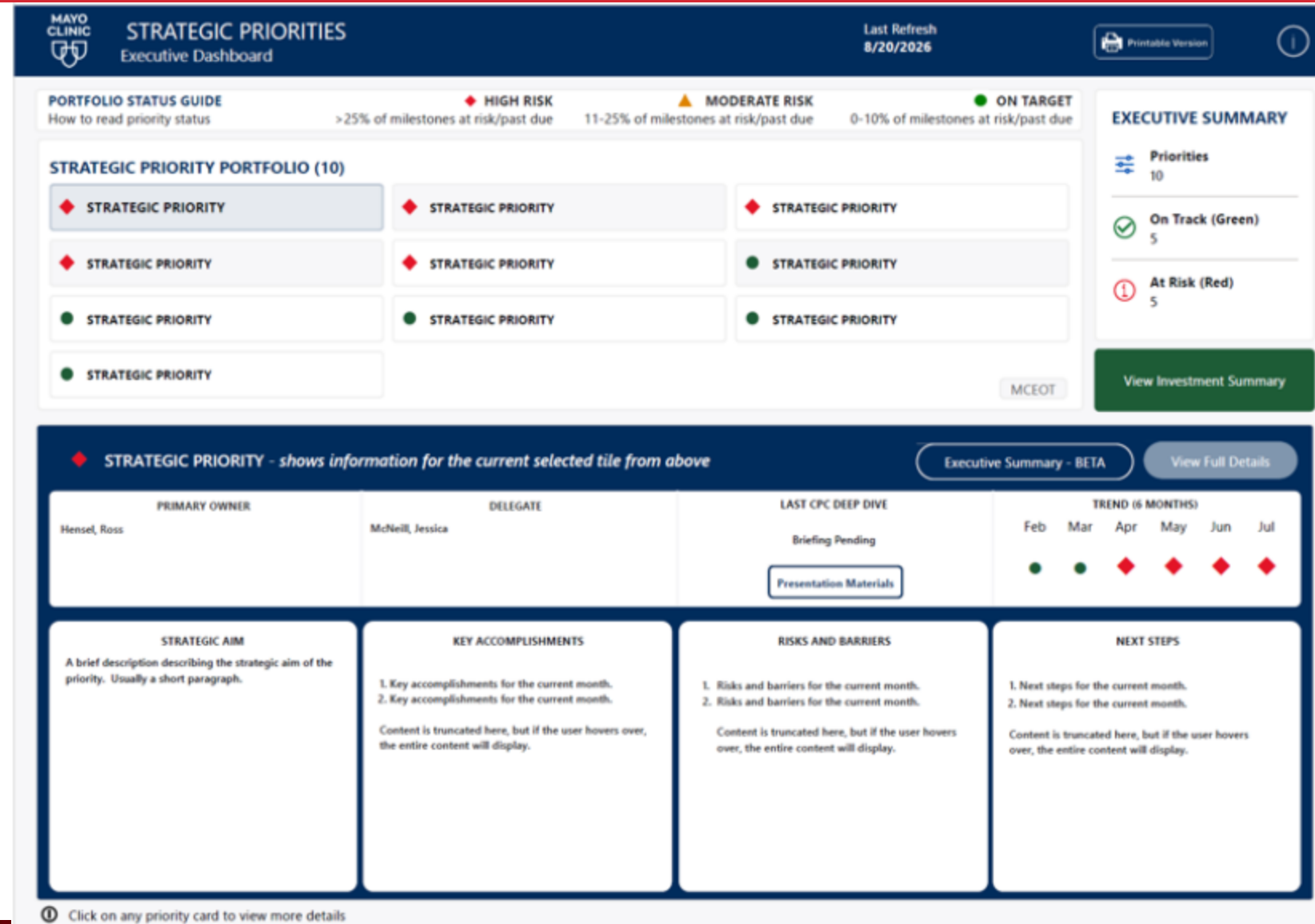
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Jessica McNeill

Priority Metrics



Strategic Priority – Executive Summary

MAYO CLINIC **STRATEGIC PRIORITIES** Executive Dashboard Last Refresh 8/20/2026 [Printable Version](#)

PORTFOLIO STATUS GUIDE
How to read priority status

- ♦ **HIGH RISK**
> 25% of milestones at risk/past due
- ▲ **MODERATE RISK**
11-25% of milestones at risk/past due
- **ON TARGET**
0-10% of milestones at risk/past due

STRATEGIC PRIORITY PORTFOLIO (10)

♦ **STRATEGIC PRIORITY**

♦ **STRATEGIC PRIORITY**

● **STRATEGIC PRIORITY**

● **STRATEGIC PRIORITY**

Executive Summary - AI BETA

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Created with AI. Instructions are provided. [Read terms](#)

[Back](#)

STRATEGIC PRIORITY

STRATEGIC PRIORITY

STRATEGIC PRIORITY

MCEOT

[View Investment Summary](#)

EXECUTIVE SUMMARY

- [Priorities](#)
10
- ✓ **On Track (Green)**
5
- i **At Risk (Red)**
5

[View Full Details](#)

Executive Summary - BETA

LAST CPC DEEP DIVE
Briefing Pending
[Presentation Materials](#)

TREND (6 MONTHS)

Feb	Mar	Apr	May	Jun	Jul
●	●	♦	♦	♦	♦

RISKS AND BARRIERS

- Risks and barriers for the current month.
- Risks and barriers for the current month.

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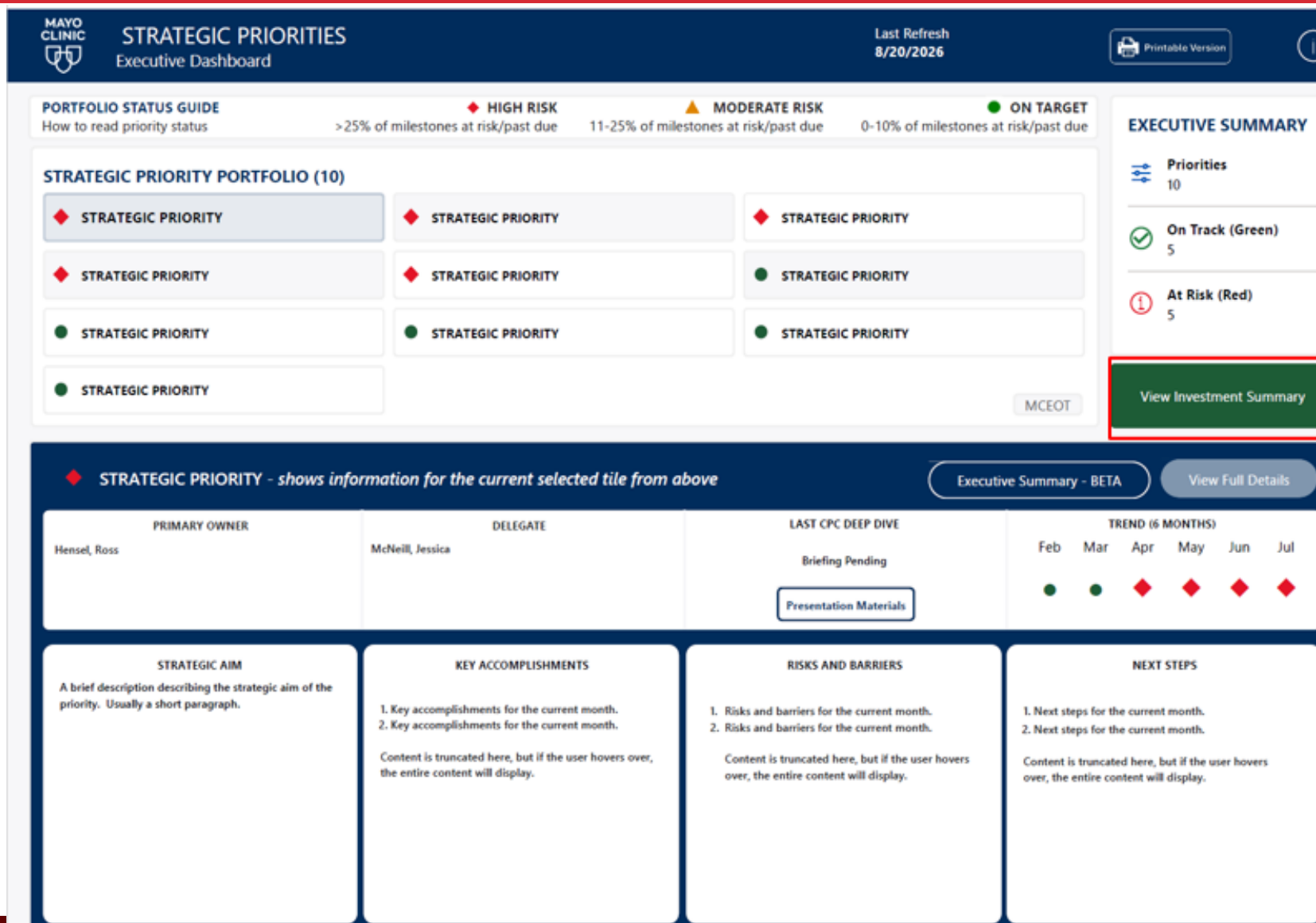
NEXT STEPS

- Next steps for the current month.
- Next steps for the current month.

Content is truncated here, but if the user hovers over, the entire content will display.

Click on any priority card to view more details

Strategic Priorities – Investment Summary



Strategic Priorities Executive Dashboard


STRATEGIC PRIORITIES
 Executive Dashboard

Last Refresh
 8/20/2026

STRATEGIC PRIORITY

Executive Summary - BETA

Home Page

PERFORMANCE HIGHLIGHTS

Select a date 3/10/2026

Key Accomplishments

1. Key accomplishments for the current month.
2. Key accomplishments for the current month.
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Risks and Barriers

1. Risks and barriers for the current month.
2. Risks and barriers for the current month.
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Next Steps

1. Next steps for the current month.
2. Next steps for the current month.
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MILESTONE HISTORY

Milestones	Target Date	Completion Status	Risk Status	Mitigation Plan
Quarterly milestones documented for each priority.	03/31/2026	Complete		
Quarterly milestones documented for each priority.	07/31/2026	Past Due	High Risk	Mitigation plan required if milestone is at risk.
Quarterly milestones documented for each priority.	09/30/2026	Started	High Risk	Mitigation plan required if milestone is at risk.
Quarterly milestones documented for each priority.	09/30/2026	Started	Moderate Risk	Mitigation plan required if milestone is at risk.
Quarterly milestones documented for each priority.	09/30/2026	Started	Moderate Risk	Mitigation plan required if milestone is at risk.
Quarterly milestones documented for each priority.	12/31/2026	Not Started	Moderate Risk	Mitigation plan required if milestone is at risk.
Quarterly milestones documented for each priority.	12/31/2026	Not Started	On Target	Mitigation plan required if milestone is at risk.

BRIEFING DOCUMENTS

Date of Event	Document Name

ASSOCIATED PROJECTS

Projects
Associated Project
Associated Project
Associated Project
Associated Project
Associated Project
Associated Project
Associated Project

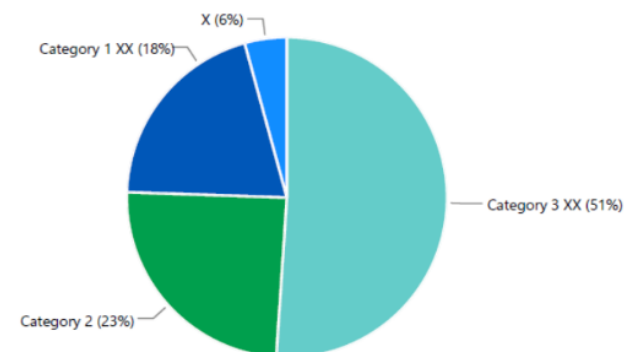
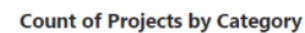
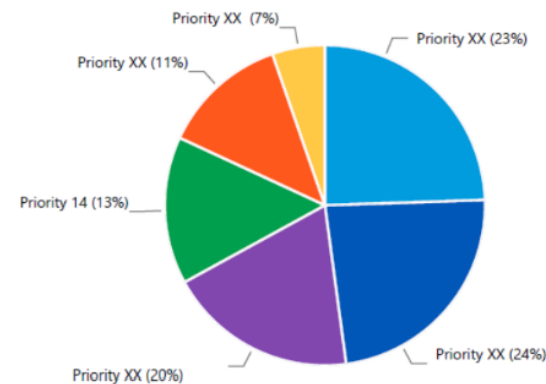


Executive Portfolio Dashboard

Last Refreshed:
8/20/2026

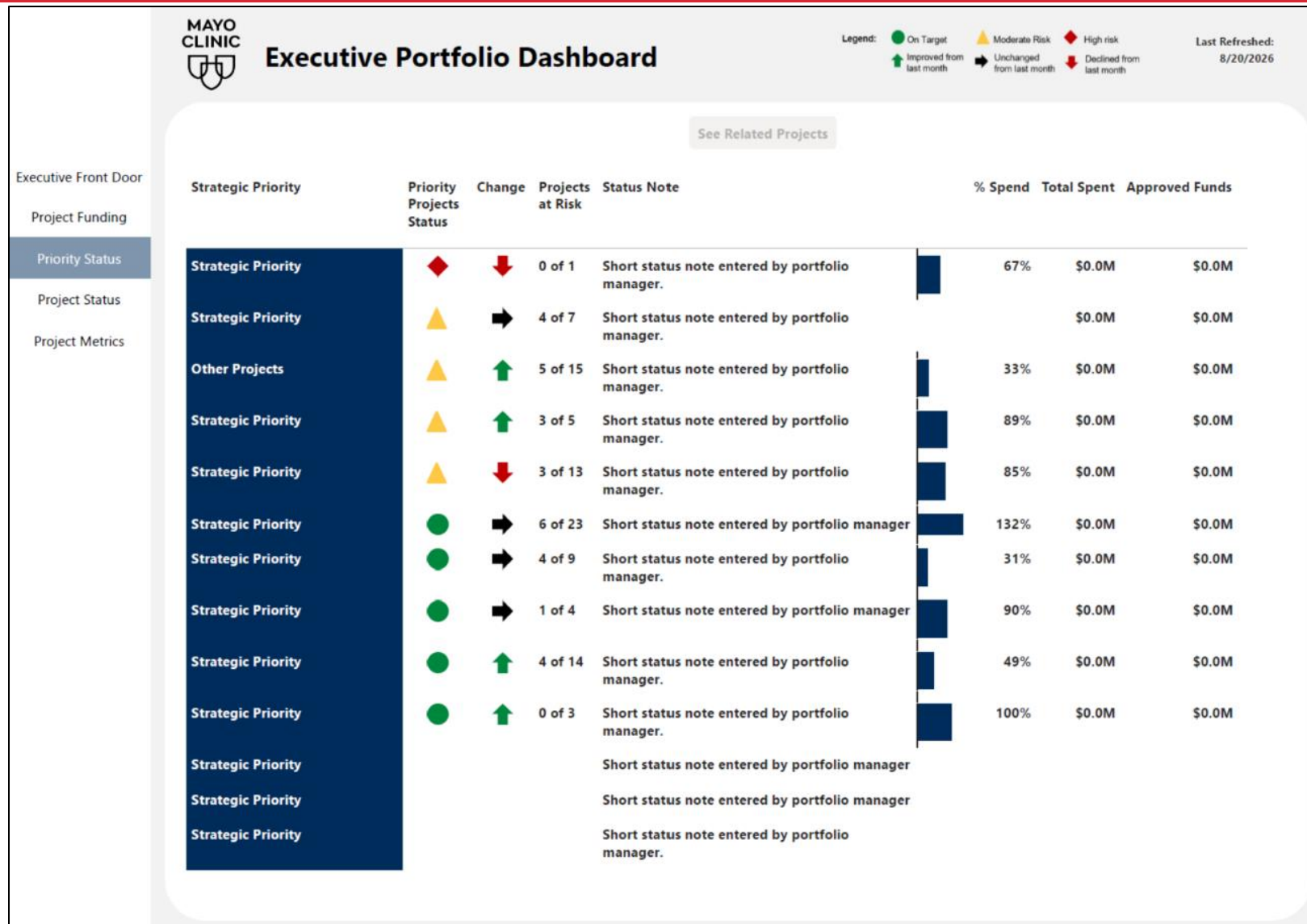
\$XX.XM

Total Approved Funds for All Active Projects (All Years, Capital, and Expense)

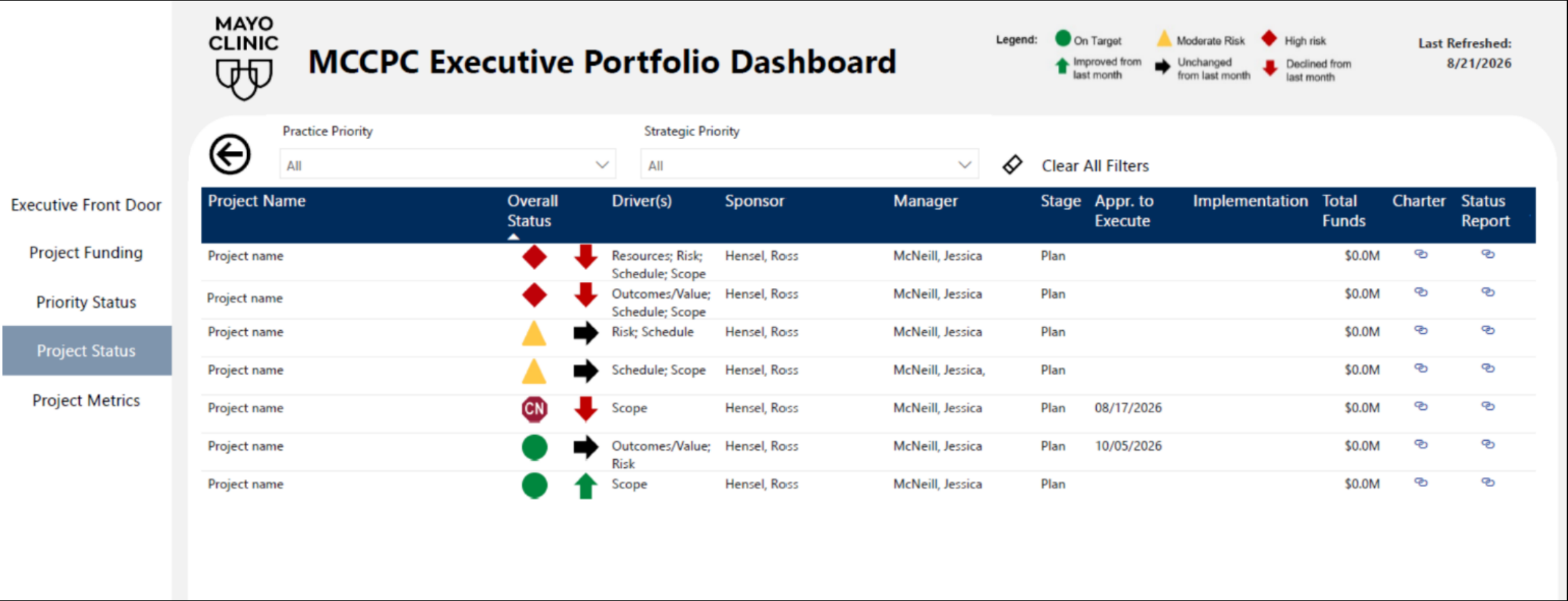


Executive Portfolio Dashboard

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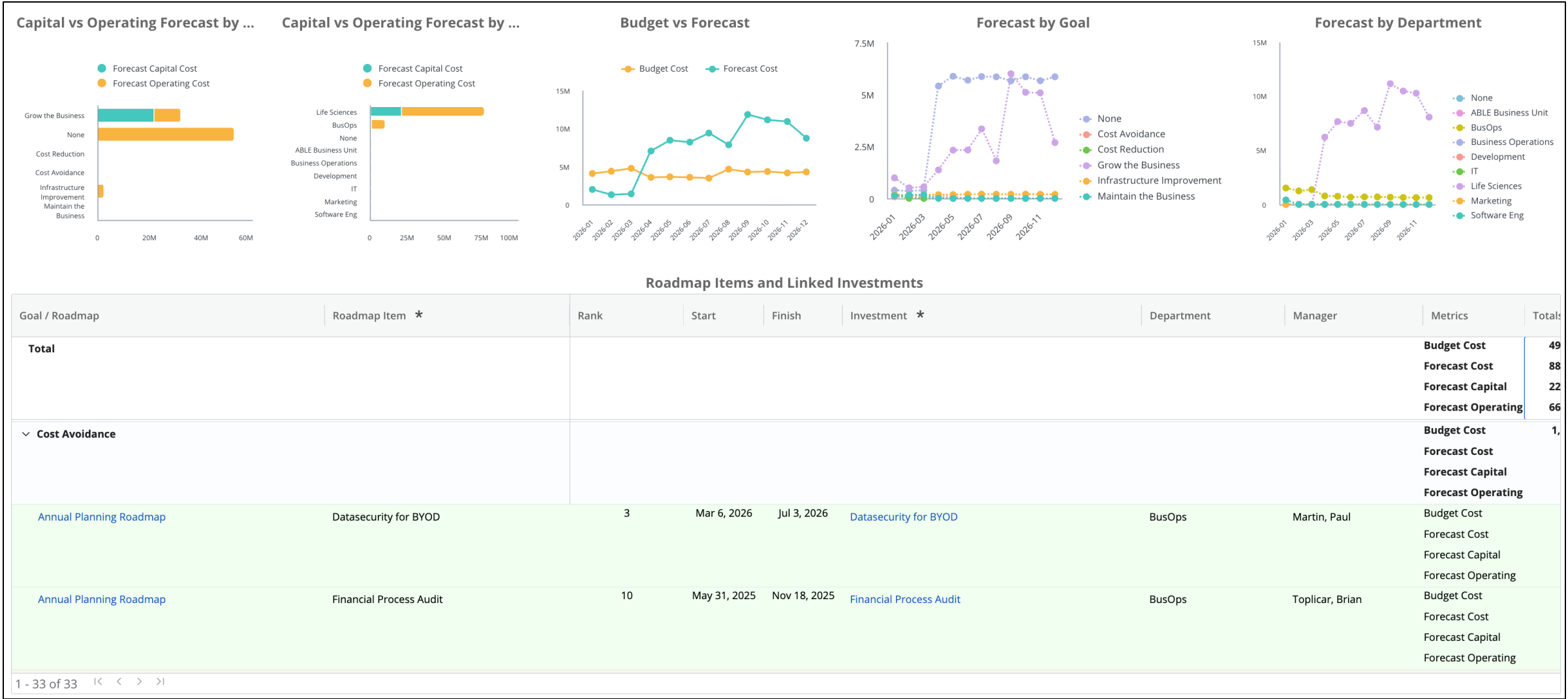


Executive Portfolio Dashboard



Modern UX Reporting Examples

Roadmap Planning



Project Schedule by Type

Project Schedule by Type																
Name	Start	Finish	Days Late %	Days Late	2026-09	2026-10	2026-11	2026-12	2027-01	2027-02	2027-03	2027-04	2027-05	2027-06	2027-07	2027-08
ABLE Payments 2.0	Apr 17, 2025	Mar 7, 2028	33	263												
Acme FinOps	Nov 1, 2026	Feb 15, 2027	0	0												
Application used for tracking drug interactions	Jan 14, 2026	Apr 27, 2026	125	130												
BI Data Lake	Jul 6, 2026	Aug 21, 2028	0	0												
BioPrint Organics	Jan 26, 2026	May 24, 2029	3	37												
Buisness Platform Modernization	Jan 18, 2026	Nov 30, 2026	0	0												
Cure Cancer ala Moonshot	Oct 1, 2025	May 18, 2029	0	0												
Cybersecurity ISO27001 Audit	Jan 31, 2025	Dec 7, 2027	0	0												
Data Center Migration - Phoenix	Jun 1, 2026	Jan 15, 2027	0	0												
DataAnywhere Release 11	Aug 31, 2026	Dec 8, 2026	0	0												
DermaNew product	Feb 12, 2026	Mar 19, 2029	0	0												
Digital Concierge – Agentic Banking Assistant	Nov 2, 2026	Feb 9, 2027	0	0												
EMEA GDPR Certifications	Feb 3, 2025	Nov 23, 2026	349	300												
EMEA Partner Channel Program	Mar 11, 2026	May 9, 2027	0	0												
EMEA Sales Ops Launch	Mar 11, 2026	May 9, 2027	0	0												
EMEA Sales Ops Launch	Mar 11, 2026	May 9, 2027	0	0												

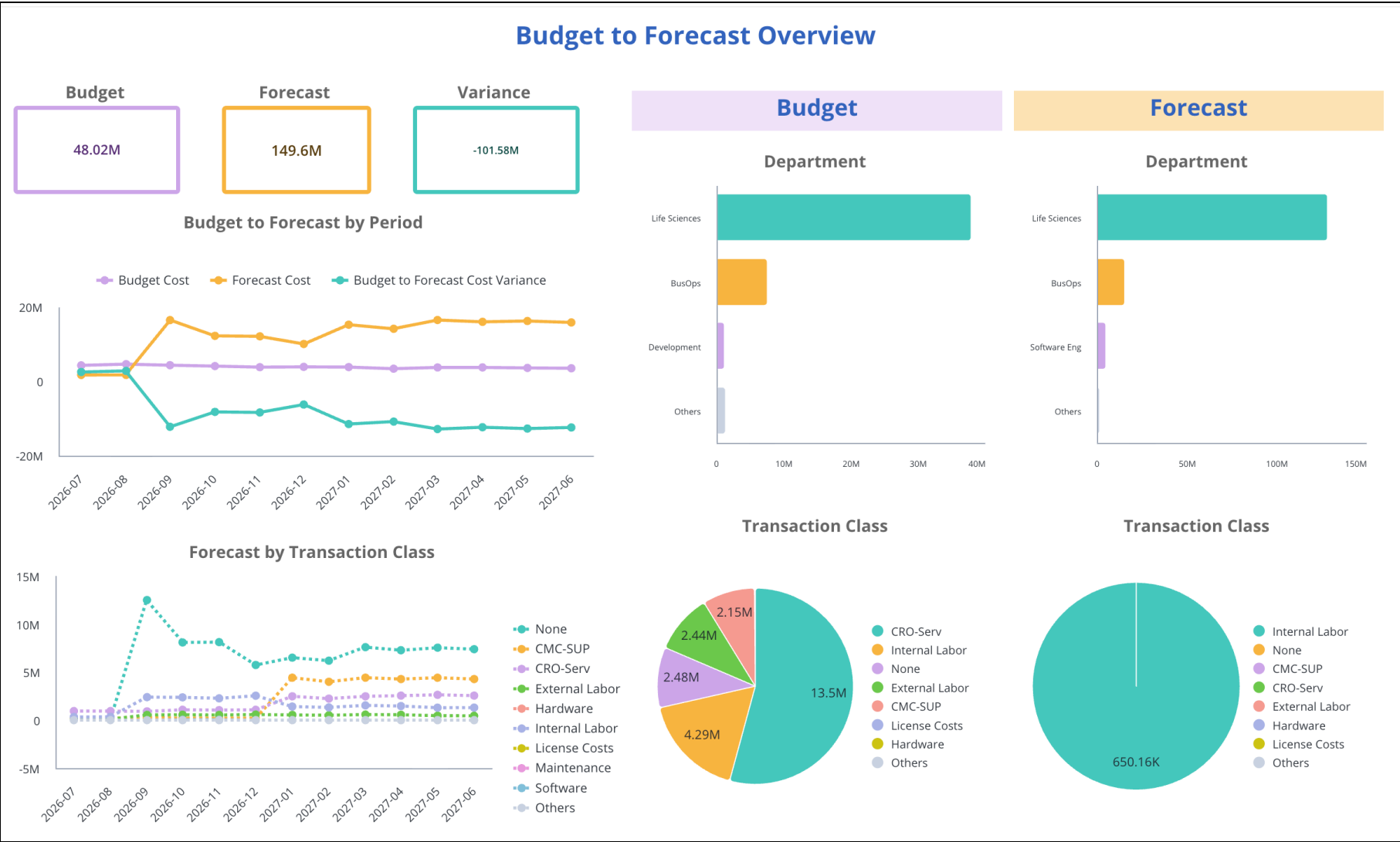
Task Dependencies

Task Dependencies							
Investment / Task / Relationship	Start *	Finish *	Dependent Investment	Dependent Task	Dependent Task Status	Dependent Task Start	Dependent Task Finish
ABLE Payments 2.0							
Closing Phase Gate Complete							
Predecessor	Nov 18, 2026	Nov 18, 2026	ABLE Payments 2.0	Lessons Learned	Not Started	Oct 19, 2026	Nov 13, 2026
Complete Project Plan							
Successor	Oct 20, 2025	Oct 5, 2026	ABLE Payments 2.0	Planning Phase Gate Complete	Started	Nov 9, 2025	Nov 9, 2025
Predecessor	Oct 20, 2025	Oct 5, 2026	ABLE Payments 2.0	Risk Response and Mitigation Plan	Started	Oct 13, 2025	Oct 5, 2026
Predecessor	Oct 20, 2025	Oct 5, 2026	BIAnywhere Release 10	Big Room Planning	Not Started	Oct 27, 2025	Nov 18, 2025
Successor	Oct 20, 2025	Oct 5, 2026	Maritime Experience Project	Risk Response and Mitigation Plan	Not Started	Mar 16, 2026	May 8, 2026
Construction Phase Gate Complete							
Successor	Jun 25, 2026	Jun 25, 2026	ABLE Payments 2.0	Functional and System Testing	Started	Jul 6, 2026	Oct 5, 2026
Predecessor	Jun 25, 2026	Jun 25, 2026	ABLE Payments 2.0	Unit and Performance Testing	Started	Feb 19, 2026	Oct 5, 2026
Database Development							
Predecessor	Nov 4, 2025	Nov 27, 2025	ABLE Payments 2.0	Planning Phase Gate Complete	Started	Nov 9, 2025	Nov 9, 2025
Successor	Nov 4, 2025	Nov 27, 2025	ABLE Payments 2.0	User Interface Development	Started	Nov 17, 2025	Oct 5, 2026
Define Scope Change and Control Process							
Predecessor	Jul 15, 2025	Jul 30, 2025	ABLE Payments 2.0	Initiating Process Complete	Completed	Jul 15, 2025	Jul 15, 2025
Successor	Jul 15, 2025	Jul 30, 2025	ABLE Payments 2.0	Risk Response and Mitigation Plan	Started	Oct 13, 2025	Oct 5, 2026
Deployment Phase Gate Complete							
Successor	Oct 19, 2026	Oct 19, 2026	ABLE Payments 2.0	Lessons Learned	Not Started	Oct 19, 2026	Nov 13, 2026
Predecessor	Oct 19, 2026	Oct 19, 2026	ABLE Payments 2.0	Usability and User Acceptance Testing	Not Started	Jan 19, 2027	Apr 28, 2027
Functional and System Testing							
Predecessor	Jul 6, 2026	Oct 5, 2026	ABLE Payments 2.0	Construction Phase Gate Complete	Started	Jun 25, 2026	Jun 25, 2026
Successor	Jul 6, 2026	Oct 5, 2026	ABLE Payments 2.0	Usability and User Acceptance Testing	Not Started	Jan 19, 2027	Apr 28, 2027
Functional and Technical Design							
1 - 50 of 1,368 < > >>							

Time Review



Budget to Forecast



Resource Capacity / Demand

Over/Under Allocation by Resource Manager

Manager / Resource	Totals	2026-09	2026-10	2026-11	2026-12	2027-01	2027-02	2027-03	2027-04	2027-05	2027-06	2027-07	2027-08
Total	101,352	(1,888)	(842)	(70)	615	10,607	10,183	13,021	13,085	12,671	13,557	14,979	15,435
Donegal, Amy	1,400	0	0	0	16	168	160	184	176	168	176	176	176
Admin, PMO	2,088	176	176	168	184	168	160	184	176	168	176	176	176
Chapin, Tom	1,400	0	0	0	16	168	160	184	176	168	176	176	176
Lang, Suzie	0	0	0	0	0	0	0	0	0	0	0	0	0
Lefevre, Christophe	(2,088)	(176)	(176)	(168)	(184)	(168)	(160)	(184)	(176)	(168)	(176)	(176)	(176)
Reed, Henry	0	0	0	0	0	0	0	0	0	0	0	0	0
Fowler, Ray	35,039	1,220	1,316	1,260	1,194	3,399	3,217	3,667	3,538	3,398	3,778	4,425	4,629
Amos, Cheryl	1,044	(88)	(88)	(84)	(81)	168	160	184	176	168	176	176	176
Arpel, Ian	2,088	176	176	168	184	168	160	184	176	168	176	176	176
Berks, Paul	2,088	176	176	168	184	168	160	184	176	168	176	176	176
Bernard, Luc	2,088	176	176	168	184	168	160	184	176	168	176	176	176
Berry, Jason	1,384	0	0	0	0	168	160	184	176	168	176	176	176
Bhatt, Rakesh	1,384	0	0	0	0	168	160	184	176	168	176	176	176
Carmen, Ed	(1,233)	(80)	0	0	(72)	(168)	(160)	(184)	(176)	(168)	(176)	(49)	0
Chasen, Nicole	2,088	176	176	168	184	168	160	184	176	168	176	176	176
Childers, Valerie	614	88	88	84	81	72	49	0	0	0	0	64	88
Clark, Patrick	2,088	176	176	168	184	168	160	184	176	168	176	176	176
Coleman, Joyce	1,747	123	123	118	129	118	112	153	176	168	176	176	176
Cope, Michael	1,044	88	88	84	92	84	80	92	88	84	88	88	88
Feinle, Kurt	2,088	176	176	168	184	168	160	184	176	168	176	176	176
Fleming, Nicole	(704)	(176)	(176)	(168)	(184)	0	0	0	0	0	0	0	0
Granger, Paula	(788)	(61)	(79)	(76)	(79)	(67)	(64)	(74)	(70)	(67)	(70)	(45)	(35)

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Organizational Breakdown Structure (OBS)

Organizational Breakdown Structures

OBS Units	Used for Access Rights	Level Name	Created By	Created Date	Updated By	Updated Date
▼ Corporate Department OBS	✓					
▶ ABLE Business Unit	✓	Department	Arpel, Ian	Aug 27, 2019	Arpel, Ian	Aug 27, 2019
▼ IT	✓	Department	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Business Operations	✓	Division	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Development	✓	Division	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Shared Services	✓	Division	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Life Sciences	✓	Department	Arpel, Ian	Apr 3, 2026	Arpel, Ian	Apr 3, 2026
▼ Corporate Location OBS						
Chicago		Location	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Hyderabad		Location	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
London		Location	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
New York		Location	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Paris		Location	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Sao Paulo		Location	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Singapore		Location	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Sydney		Location	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
Tokyo		Location	Admin, PMO	Aug 27, 2019	Admin, PMO	Aug 27, 2019
▶ Organizational	✓					
▶ Resource Pool	✓					
▶ Security OBS - Pages	✓					

Power BI Reporting Examples

Project Waterline

Apply Selections

8/1/2025

12/31/2025

Last Refreshed:

8/22/2025 1:05:59 PM

Monthly Total

Quarterly Avg

Roadmap (Y/N)

Select all

(Blank)

No

Yes

Water Team

Multiple selections

Primary Role

Multiple selections

Resource Level

All

Project. Primary Business Unit

Multiple selections

Project Work Status

Multiple selections

Water Discipline

All

Investment Type

All

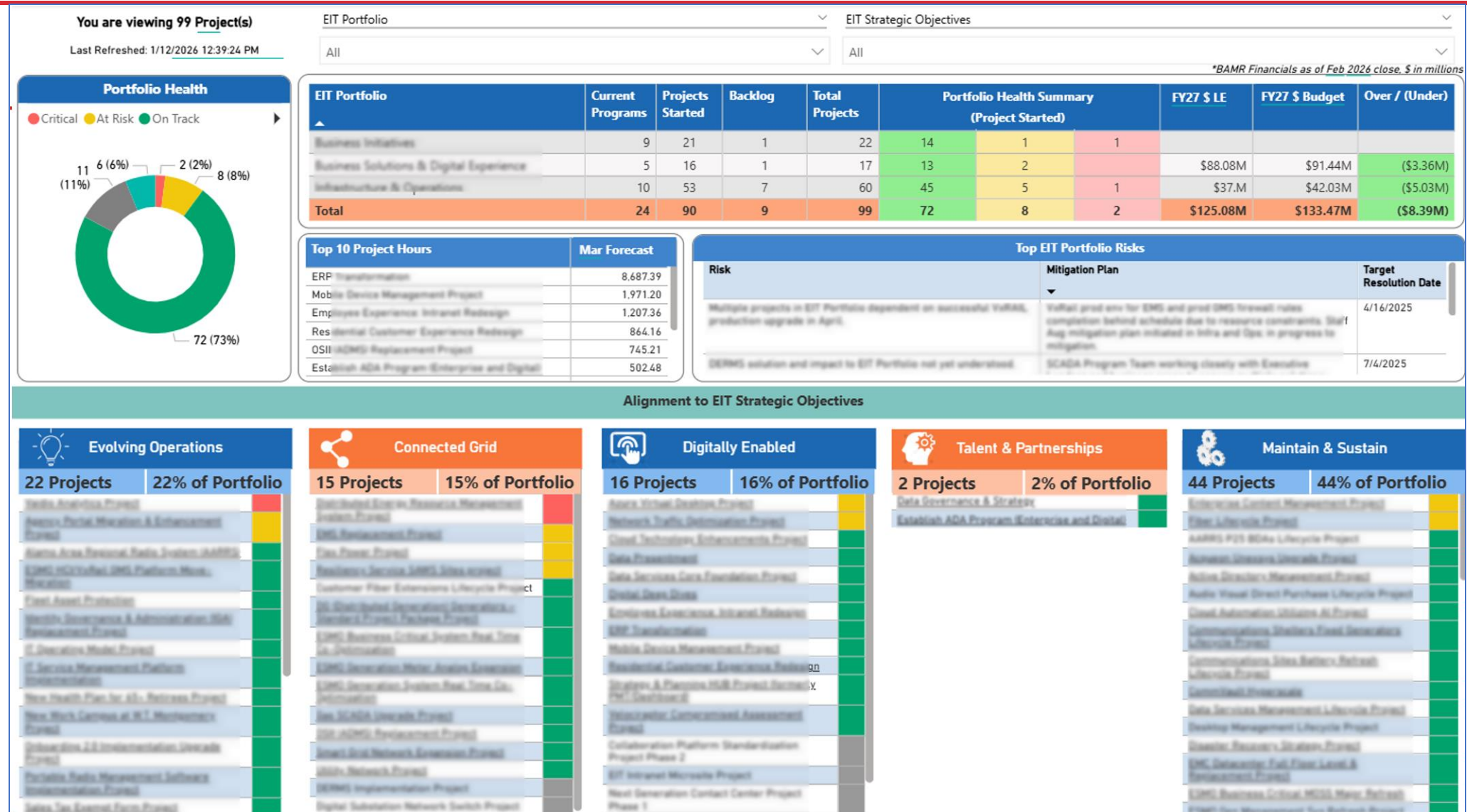
Project. Project Owning Unit

All

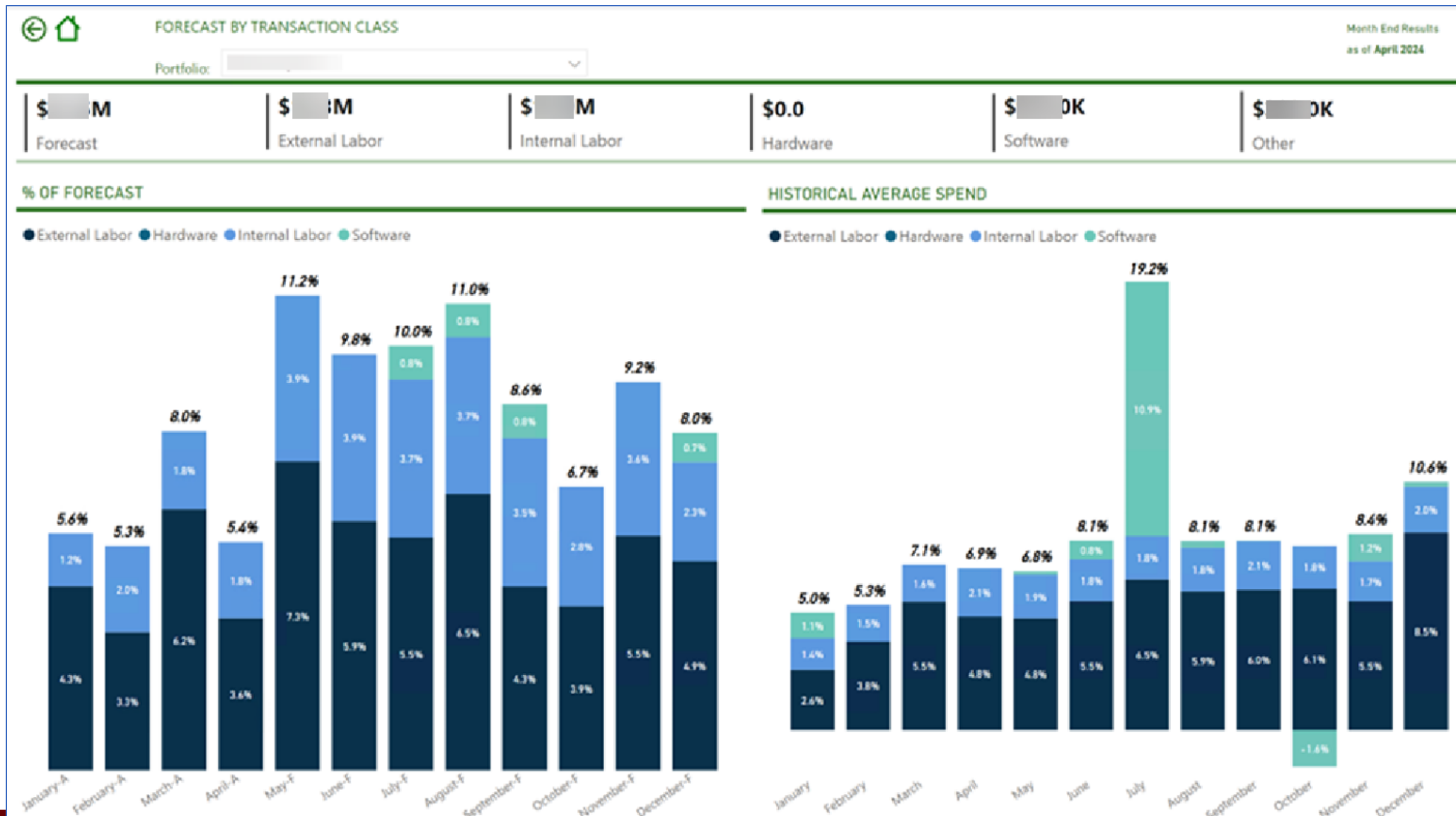
Waterline by						Period	2025-08			2025-09			2025-10			2025-11	
Primary Role						Water Team	US RES R&D			US RES PM		US RES R&D		US RES PM		US RES PM	
Investment	Seq	Kickoff	Finish			Data & Analytics	Project Engineer	Reliability Engineer	Project Management	Data & Analytics	Project Engineer	Reliability Engineer	Project Management	Data & Analytics	Project Engineer	Reliability Engineer	Project Management
Resource Total Capacity						1.0	10.0	3.0	2.0	1.0	10.0	3.0	2.0	1.0	10.0	3.0	2.0
NPI Capacity						-0.1	7.3	1.7	1.0	0.5	7.3	1.7	1.0	1.0	7.4	1.7	1.0
Resource Total Demand						0.7	4.3	2.3		0.7	4.5	2.4		0.7	4.6	2.4	
Resource Demand						0.7	3.5	2.2		0.7	3.5	2.2		0.7	3.8	2.3	
Role Demand							0.8	0.1			1.0	0.3			0.8	0.2	
Resource Availability (Need)						-0.8	3.0	-0.6	1.0	-0.2	2.8	-0.7	1.0	0.3	2.8	-0.7	1.0
00597-PROCESS	1		12/31/2027			0.1		0.4		0.1		0.4		0.1		0.4	
00694-WILAND	1		12/10/2026			0.1		0.2		0.1		0.2		0.1		0.2	
00904-Polis	1		9/16/2027			0.1	0.8	0.2		0.1	0.8	0.2		0.1	0.8	0.2	
01371-HTZ NOV - ASSE 1004/25 La...	1	6/20/2025	9/22/2026				0.3				0.3				0.3		
00332-Zeus - Commercial Integratio...	2		7/28/2028			0.1		0.4		0.1		0.4		0.1		0.4	
00695-LOCHNADO	2		7/15/2027														
00915-Aquaria	2		7/1/2027														
01257-Standard - Ultra Low GWP ...	2	4/8/2025	11/5/2027				0.5				0.5				0.5		
00564-Hulk 2 Commercial Global Pl...	3		10/22/2026			0.1		0.4		0.1		0.4		0.1		0.4	
00574-Indigene Light	3		5/31/2029			0.1		0.2		0.1		0.2		0.1		0.3	
00950-VENTURA	3		9/3/2027														
01341-ONWARD	3		11/3/2028														
00942-ARTEMIS - Commercial Elect...	4		12/10/2027					0.1				0.1				0.1	
00948-ACOMA	4		9/30/2027														
02164-Tubex/Orbital - Rappah	4		7/1/2027														

Portfolio Summary

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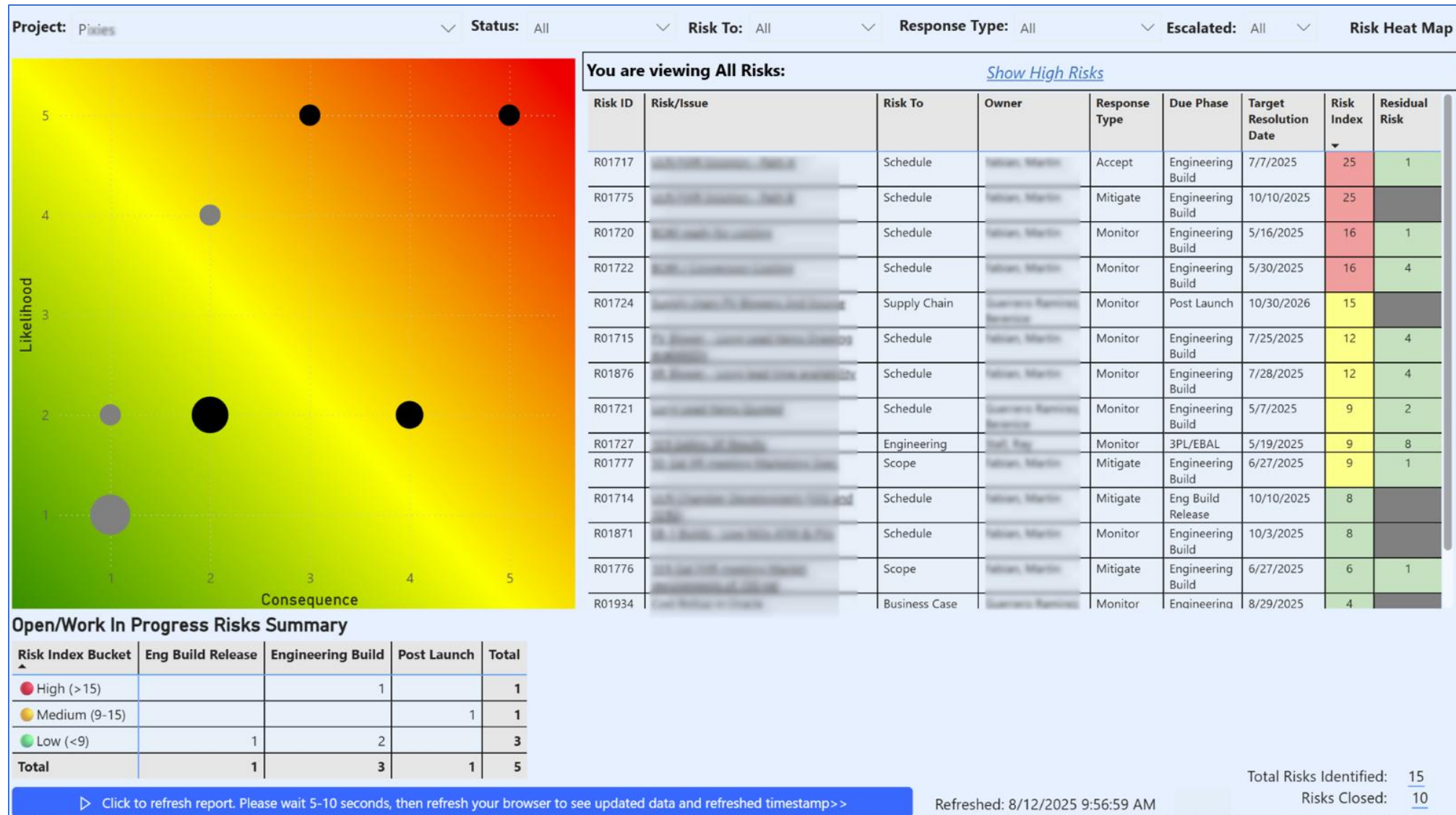


Forecast by Transaction Class

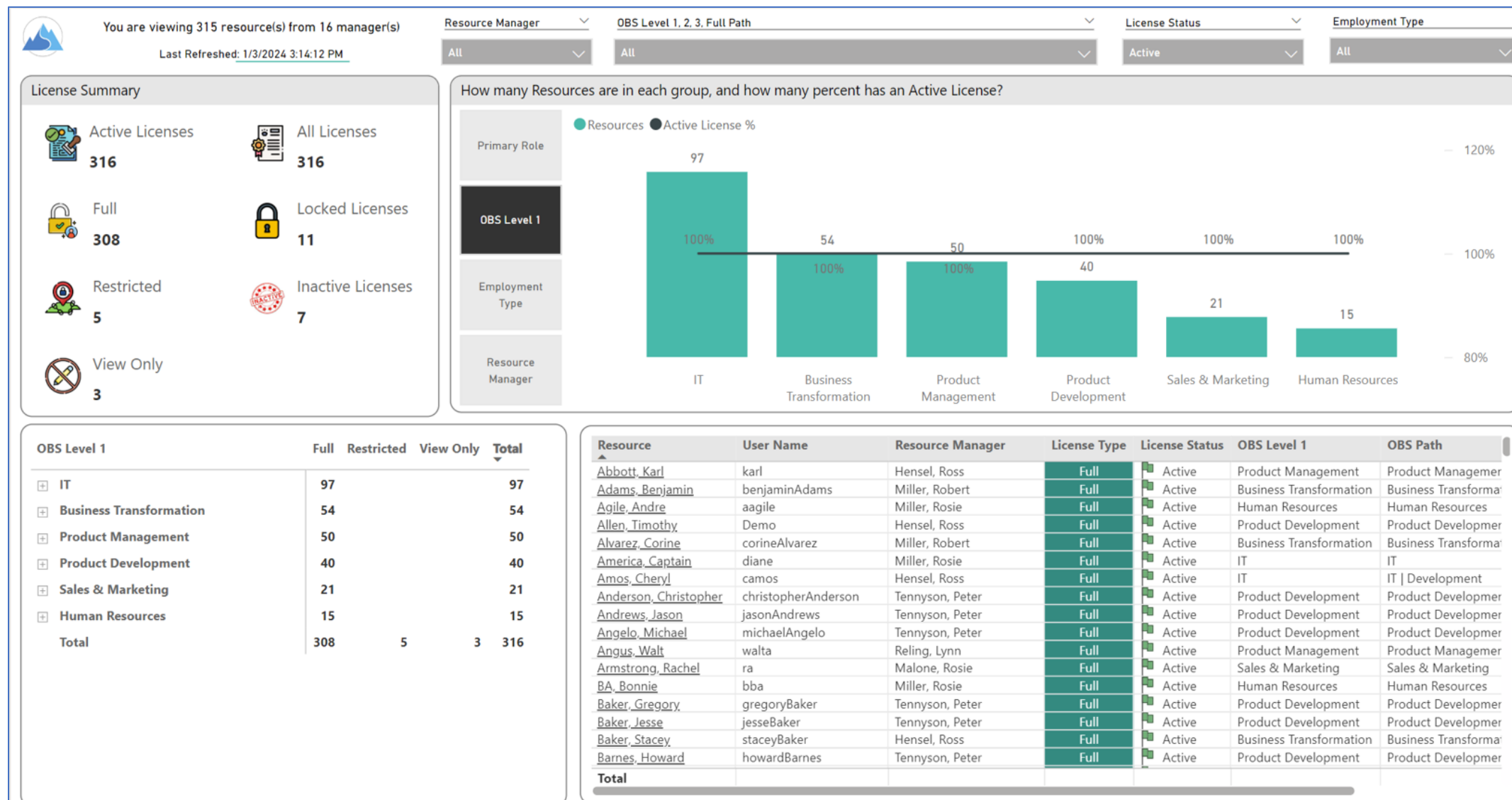


Risk Heatmap

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License Tracking



Paginated Report

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PROJECT	NPI_TEST_Quickstart		Issue ID	I00503		
Issue Name	FHR Performance Unsatisfactory-Issue		Issue Status	At Risk		
Issue Description	Early bench tests indicate Product performance is 7.4% below target. Team evaluation focus on heat transfer rate and energy input		Status	Open		
			Created Date	10/27/2025		
			Issue Source	Engineering		
			Impact To	Scope		
ACTIONS to Root Cause Solution:			Due Date	Status		
Root Cause 1 Why 1			11/21/2025	Open		
Root Cause 1 Why 2			11/21/2025	Open		
Root Cause 1 Why 3			11/21/2025	Open		
Root Cause 1 Why 4			11/21/2025	Open		
Root Cause 1 Why 5			11/21/2025	Open		
Root Cause						
Solution Criteria:			Due Date	11/10/2025		
ACTIONS to ISSUE Solution:		Severity	Due Date	Status		
Issue Resolution Step1			11/28/2025	Open		
Issue Resolution Step 2			12/3/2025	Open		
Estimated Additional Hours to Issue Solution (h):						
Estimated Product Cost Impact (+/- \$ /per Unit):						
Estimated Product Launch Date Impact (+/- days):						

Paginated Report

Decision Board Meeting Minutes											
											Updated: 2 Nov 2023
Rev Number	Score	Rev Dec	Stage	Track	New Funding	New Supp.	Total Approved Including Decision	Total Installed Cost	Current Year Budget	Current Year Forecast	Next Review Date
26169			2023 Water Main Upgrade Ph. 1								
	21	Go	Development		0	0	30,700,000	33,612,491	125,003	1,088,176	8 Sep 2020
				Expense - AER	0	0	200,000	0	0	0	
				Capital	750,000	0	9,420,000	0	0	0	
				Expense - X5	0	0	0	0	0	0	
				Expense - X1/X3	0	0	0				
				AFE Capital Hold	-750,000	N/A	21,080,000				
				Management Reserve	0	N/A	0				
Decision Date 7/9/20 - Decision Board Comments: (CAD)											
Released Bridge Funding \$750k											
FOLLOW UPS FOR PROJECT TEAM											
- Approval to bridge over to Implementation stage until Project Team has sufficient time to prepare documents for Implementation approval											
- Return to DB for Implementation approval, target August											
12-Aug-20: Moved next DB date from Aug to Sep											
26169			2023 Water Main Upgrade Ph. 1								
	21	Go	Implementation		25,880,000	0	30,700,000	33,612,491	125,003	1,088,176	31 Oct 2022
				Expense - AER	0	0	200,000	0	0	0	
				Capital	4,800,000	0	9,420,000	0	0	0	
				Expense - X5	0	0	0	0	0	0	
				Expense - X1/X3	0	0	0				
				AFE Capital Hold	21,080,000	N/A	21,080,000				
				Management Reserve	0	N/A	0				

Questions?



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Complete 10 eligible learning units
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**Best Practice
Clarity Lead**

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Deepen your skills in focused topic areas.
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specialization, with the option to earn multiple specializations.



**Artificial
Intelligence (AI)**



**Reporting &
Analytics**



Technical



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



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



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