



The Rego Power BI Reporting Suite

Your Guide:
Lulu Wang

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Introduction

Agenda

- Reporting Suite Overview
 - Finding the Reporting Suite
 - Implementation and Setup
 - Customization and Flexibility
 - Ownership and Maintenance
- Rego's Power BI SaaS Service
- Clarity Demo

Additional Reporting Examples to Explore:

- Project Management
- Financial Management
- Investment Management
- Resource Management
- Time Management
- Ideas
- Roadmap
- Work Management
- Portfolio: Investments and Hierarchy
- Program
- Resource
- Resource Allocation Planning
- Timesheet Compliance
- Financial
- Data Integrity
- Adoption Metrics
- Dark Theme

Introductions

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



Rego Power BI Reporting Suite

Suite Highlight	What It Means
Nearly 150 Free Reports	The suite features nearly 150 free Power BI reports, designed to enhance project management and reporting capabilities.
Direct Connection to Clarity Environment	These reports can seamlessly connect to your 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 Power BI in project management.

Finding the Reporting Suite

1

The Rego Power BI Reporting Suite is available at no cost on RegoXchange, providing easy access to users.

2

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

3

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

4

Row-level security limits user visibility to the data they are authorized to view.

Implementation and Setup

Implementation Effort

The implementation of the Rego Power BI Reporting Suite requires relatively little implementation effort, primarily focused on data integration and report customization.

Environment Customization

Users can tailor the reporting environment to their specific needs by adjusting the configuration to align with their organization's 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 Power BI suite.

Customization and Flexibility

1

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

2

Integration with Clarity DWH / Live Database allows for dynamic data retrieval through Broadcom or Rego OData connectors, or direct database connection for on-premises clients.

3

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

Ownership and Maintenance

➤ After implementation, clients typically own the Power BI reports, ensuring they have full control over their data and insights.

👉 Rego offers ongoing support options, including maintenance and consulting support for troubleshooting and enhancements

Rego's Power BI SaaS Service



Rego's Power BI SaaS Service

Service Overview

Rego's Power BI SaaS service installs, sets up, and maintains Power BI reports for you. It also includes Power BI licenses, so you don't have to manage Microsoft licensing.

Data Management

Automated data refreshes keep reports current without manual intervention.

Support and Maintenance

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

Clarity Demo



Questions?



Survey



Please take a few moments to fill out the class survey.

Your feedback is extremely important for future events.



Earn Rego University Certifications and Professional Specializations

Your participation in this class may count toward Rego University certification progress.

Certifications

Build recognized Clarity expertise.
Complete 10 eligible learning units
within a certification track.



**Best Practice
Clarity Administrator**



**Best Practice
Clarity Lead**

Professional Specializations

Deepen your skills in focused topic areas.
Complete 4 eligible learning units within a selected
specialization, with the option to earn multiple specializations.



**Artificial
Intelligence (AI)**



**Reporting &
Analytics**



Technical



Important: Complete the class survey in the app after each session so your credits can be tracked.

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- 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**
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Let us know how we can improve!
Remember to fill out the class survey.



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Continue to Get Resources and Stay Connected

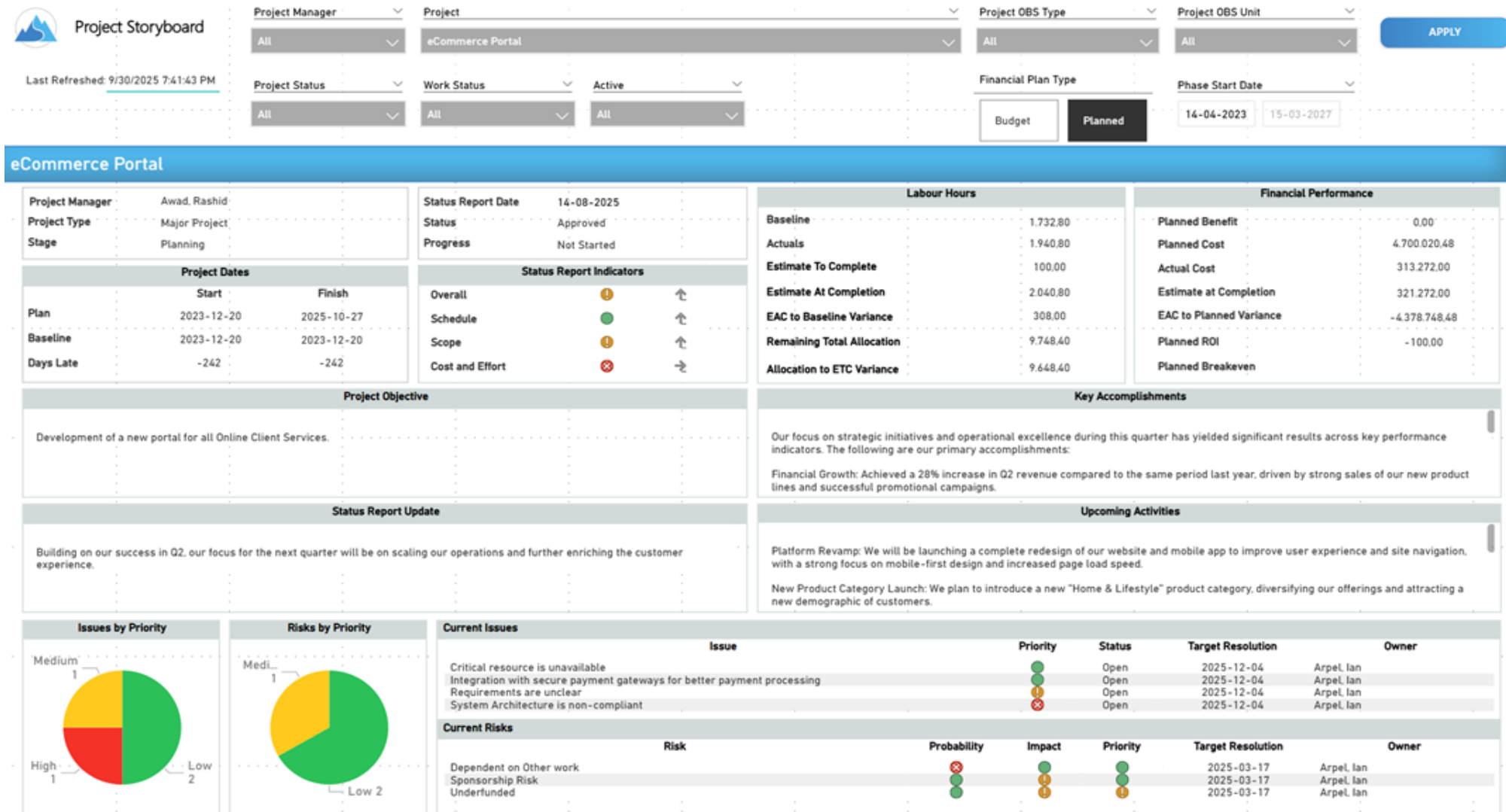
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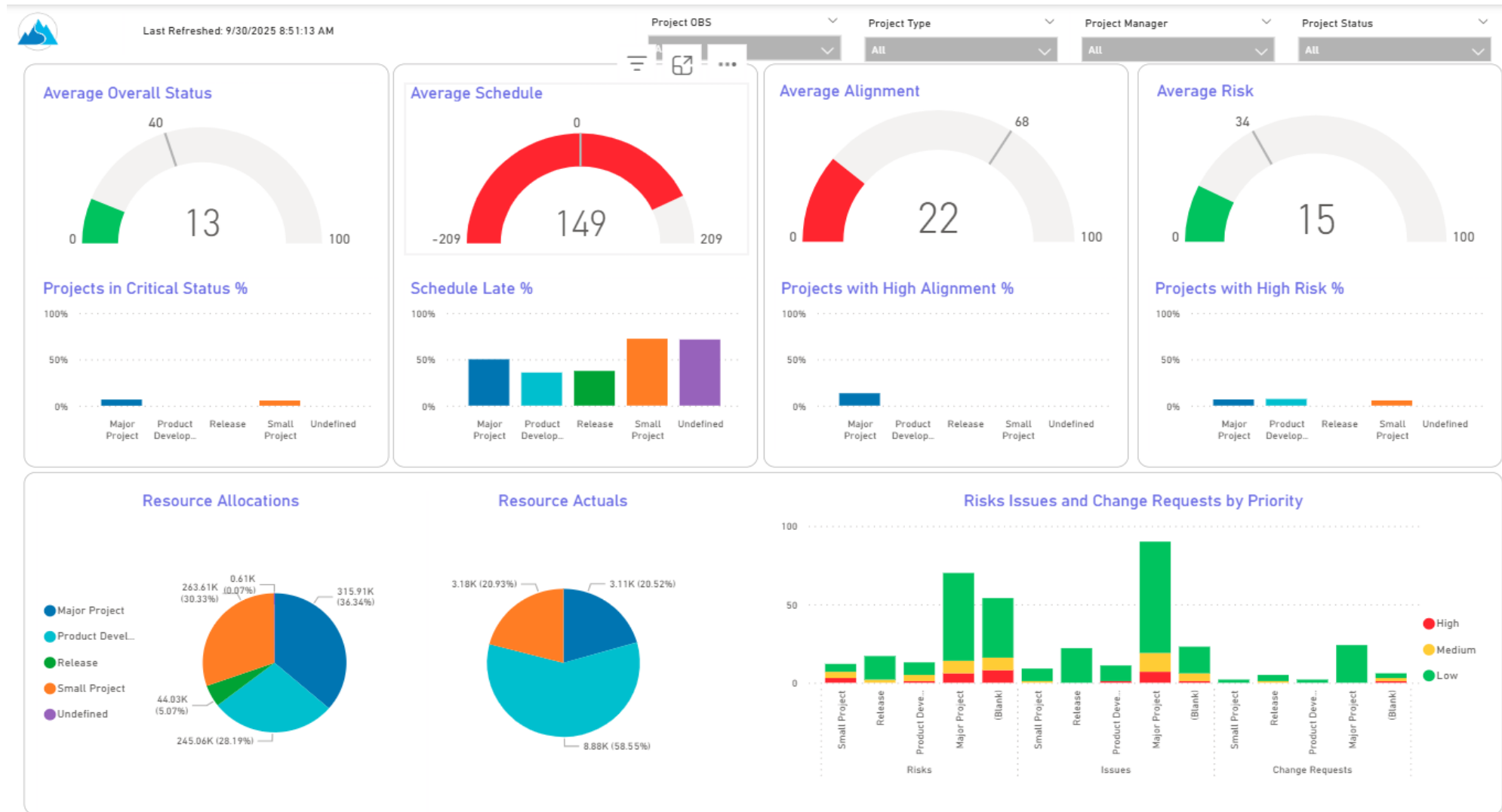
Additional Reporting Examples to Explore

Project Management

Project Storyboard



KPIs by Project Type (Dashboard)



Project Cost and Effort



Project Cost and Effort

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Project OBS

All

Project Manager

All

Project

ABLE Payments

Project Status

All

Work Status

All

Active Status

All

Investment Name	BAC Cost	Actual Cost	EAC Cost	Projected Cost Variance	Projected Cost Variance %	BAC Hours	Actual Hours	EAC Hours	Projected Effort Variance	Projected Effort Variance %
ABLE Payments	1,468,410.78	800,700.00	1,086,989.68	-381,421.10		7,716.68	3,028.00	8,385.88	669.20	
0006 - Initiation Phase	0.00	0.00	0.00	0.00		8.00	0.00	0.00	-8.00	
Initiating Process Complete	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Initiation Phase	0.00	0.00	0.00	0.00		8.00	0.00	0.00	-8.00	
0010 - Planning Phase	133,600.00	70,320.00	70,320.00	-63,280.00		80.00	422.00	462.00	-338.00	
Complete Project Plan	20,800.00	24,320.00	24,320.00	3,520.00		120.00	142.00	142.00	22.00	
Granger, Paula	8,000.00	8,000.00	8,000.00	0.00		40.00	40.00	40.00	0.00	
Lewis, Dana	6,400.00	9,920.00	9,920.00	3,520.00		40.00	62.00	62.00	22.00	
Quinn, Randy	6,400.00	6,400.00	6,400.00	0.00		40.00	40.00	40.00	0.00	
Define Scope Change and Control Process	6,400.00	6,400.00	6,400.00	0.00		40.00	40.00	40.00	0.00	
Lewis, Dana	6,400.00	6,400.00	6,400.00	0.00		40.00	40.00	40.00	0.00	
Functional and Technical Design	26,800.00	26,800.00	26,800.00	0.00		160.00	160.00	160.00	0.00	
Berry, Jason	12,800.00	12,800.00	12,800.00	0.00		80.00	80.00	80.00	0.00	
Roberts, Beth	14,000.00	14,000.00	14,000.00	0.00		80.00	80.00	80.00	0.00	
Security Architect	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Operations Review	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Planning Phase	66,800.00	0.00	0.00	-66,800.00		40.00	0.00	0.00	-40.00	
Planning Phase Gate Complete	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Requirements Definition	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Travel	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Risk Response and Mitigation Plan	12,800.00	12,800.00	12,800.00	0.00		80.00	80.00	120.00	40.00	
Engineer	0.00	0.00	0.00	0.00		0.00	0.00	40.00	40.00	
Quinn, Randy	12,800.00	12,800.00	12,800.00	0.00		80.00	80.00	80.00	0.00	
0019 - Construction Phase	1,040,400.00	494,360.00	495,660.00	-544,740.00		2,487.00	1,084.00	1,084.00	-1,403.00	
Construction Phase	546,040.00	0.00	0.00	-546,040.00		1,405.00	0.00	0.00	-1,405.00	
Construction Phase Gate Complete	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Database Development	294,200.00	294,200.00	294,200.00	0.00		120.00	121.00	121.00	1.00	
Berry, Jason	12,800.00	12,800.00	12,800.00	0.00		80.00	80.00	80.00	0.00	
Granger, Paula	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Newburg, Mary	6,400.00	6,400.00	6,400.00	0.00		40.00	40.00	40.00	0.00	
Server Equipment	275,000.00	275,000.00	275,000.00	0.00		1.00	1.00	1.00	0.00	
Unit and Performance Testing	169,280.00	169,280.00	170,580.00	1,300.00		818.00	819.00	819.00	1.00	
Berry, Jason	35,360.00	35,360.00	35,360.00	0.00		221.00	221.00	221.00	0.00	
Fleming, Nicole	21,120.00	21,120.00	21,120.00	0.00		128.00	128.00	128.00	0.00	
Garcia, Alex	31,350.00	31,350.00	31,350.00	0.00		190.00	190.00	190.00	0.00	
License Costs	42,000.00	42,000.00	42,000.00	0.00		1.00	1.00	1.00	0.00	
Morris, Tom	23,850.00	23,850.00	23,850.00	0.00		159.00	159.00	159.00	0.00	
QA	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Stoneburg, Sam	15,600.00	15,600.00	16,900.00	1,300.00		120.00	120.00	120.00	0.00	
User Interface Development	30,880.00	30,880.00	30,880.00	0.00		144.00	144.00	144.00	0.00	
Berry, Jason	6,400.00	6,400.00	6,400.00	0.00		40.00	40.00	40.00	0.00	
Morris, Tom	7,200.00	7,200.00	7,200.00	0.00		48.00	48.00	48.00	0.00	
QA	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	

Project Issue Register



You are viewing 78 project(s)
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Project Issue Register

Project OBS Type All	Project OBS Unit All	Project Type All	Project Manager All
Sponsor All	Project All	Project Status All	Work Status All
Issue Priority All	Issue Status All	Project Active All	Is Program All

Project	Issue ID	Issue	Issue Description	Issue Created Date	Owner	Target Resolution Date	Impact Date
ABLE Payments 2/0	IS00000001	Critical resource is unavailable		09-01-2019	Lewis, Dana	05-12-2025	27-02-2025 00:00:00
ABLE Payments 2/0	IS00000002	Integration with secure payment gateway error resolutions for better payment processing		09-01-2019	Lewis, Dana	09-12-2025	27-02-2025 00:00:00
ABLE Payments 2/0	IS00000003	Requirements are unclear		09-01-2019	Arpel, Ian	21-12-2025	27-02-2025 00:00:00
ABLE Payments 2/0	IS00000004	System Architecture is non-compliant		09-01-2019	Arpel, Ian	01-12-2025	27-02-2025 00:00:00
ABLE Payments 2/0	IS00000082	Scope Change	Infrastructure must be completed. Delays here will cause us to miss Go Live	01-27-2025	Lewis, Dana	27-01-2025	27-01-2025 00:00:00
Analytics and ERP Implementation	IS00000164	Critical resource is unavailable		08-04-2025	Hensel, Ross	29-08-2025	13-08-2025 00:00:00
Analytics and ERP Implementation	IS00000165	Integration with secure payment gateway error resolutions for better payment processing		08-04-2025	Hensel, Ross	31-07-2025	27-07-2025 00:00:00
AP Architecture Consolidation	IS00000001	Critical resource is unavailable		09-19-2025	Arpel, Ian	07-10-2022	14-10-2022 00:00:00
AP Architecture Consolidation	IS00000002	Integration with secure payment gateways for better payment processing		09-19-2025	Arpel, Ian	07-10-2022	14-10-2022 00:00:00
AP Architecture Consolidation	IS00000003	Requirements are unclear		09-19-2025	Arpel, Ian	07-10-2022	14-10-2022 00:00:00
AP Architecture Consolidation	IS00000004	System Architecture is non-compliant		09-19-2025	Arpel, Ian	07-10-2022	14-10-2022 00:00:00
AP Architecture Consolidation	IS00000066	Push back from Line 1 level		09-19-2025	Arpel, Ian	05-11-2024	05-11-2024 00:00:00

Project Risk Register



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Project OBS

All

Project Status

All

Include Programs?

Select all

Non Program

Program

Project Type

All

Work Status

All

Include Inactive Projects?

Select all

Active

Inactive

Project Manager

All

Risk Priority

All

Sponsor

All

Risk Status

All

Project

All

Group By

Project

Project	Created Date	Risk Name	Description	Target Resolution	Impact Date	Resolution	Probability	Impact	Response
SSG Services Template - ID1057									
RSK00000102 - 5022004	4/16/2025	Data Privacy and Security Breach	Since FleetTrack Pro handles sensitive data like vehicle locations, driver details, and delivery routes, it is vulnerable to cyberattacks and data breaches. A breach could expose confidential business information, leading to legal issues, financial l	3/19/2025	3/19/2025		Low	High	Watch
RSK00000103 - 5022003	4/16/2025	GPS Signal Loss and Tracking Failure	FleetTrack Pro relies heavily on GPS signals for real-time tracking and route optimization. Poor signal reception due to remote locations or weather conditions could lead to inaccurate tracking, delayed deliveries, and lost vehicles.	3/19/2025	3/19/2025	Use multi-network GPS modules and offline caching to store route data. Enable automatic reconnection and fallback to cellular network triangulation when GPS is unavailable.	Low	Low	Watch
RSK00000104 - 5022002	4/16/2025	Driver Resistance to New Technology	Drivers may resist using	3/19/2025	3/19/2025		Low	Low	Watch

Notes

Project	Date Entered	Subject	Description	Entered By
Upgrade to DoD IL 4 compliance - PR2006				
RSK00000002 - 5001014	8/28/2025	Underfunded	Underfunded Description	Conway, Jack
5,000,000.00				

Associated Action Items

Project	Due Date	Subject	Assigned To	Status
Upgrade to DoD IL 4 compliance - PR2006				
RSK00000002 - 5001014	9/1/2025	Underfunded Action	Conway, Jack	Open
5035002				



Associated Tasks

Project	Task Name	Start	Finish	% Complete	Status
Upgrade to DoD IL 4 compliance - PR2006					
RSK00000002 - 5001014	Underfunded Task	2/18/2025	3/6/2025	0.00	Not Started
111					

Project Risk Register

Project Risk Register (Risk Only)

Let Rego be your guide.

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Project Risk Register (Cont.)



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Project OBS

All

Project Type

All

Project Manager

All

Sponsor

All

Project

All

Project Status

All

Work Status

All

Risk Priority

All

Risk Status

All

Group By

Project

Include Programs?

Select all

Non Program

Program

Include Inactive Projects?

Select all

Active

Inactive

Project	Created Date	Risk Name	Description	Target Resolution	Impact Date	Resolution	Probability	Impact	Response Type	Calculated Risk	Category
**Electric Upgrade - PR2169											
RSK00000001 - 5026001	7/14/2025	Sponsorship Risk	Executive Steering Meetings are poorly attended	10/10/2022	10/10/2022		Low	Low	Watch	1	Sponsorship
RSK00000002 - 5026000	7/14/2025	Underfunded	Budget was approved lower than the original ask and we are unable to get the number of contractors needed	10/10/2022	10/10/2022		Low	Low	Watch	1	Funding
RSK00000003 - 5026004	7/14/2025	Dependent on Other work	Infrastructure must be completed. Delays here will cause us to miss Go Live	10/10/2022	10/10/2022		Low	Low	Watch	1	Interdependence
ABLE Payments 2/0 - PR2009											
RSK00000001 - 5001029	9/1/2019	Sponsorship Risk	Executive Steering Meetings are poorly attended	4/5/2024	4/18/2024		High	High	Watch	9	Sponsorship
RSK00000002 - 5001030	9/1/2019	Underfunded	Budget was approved lower than the original ask and we are unable to get the number of contractors needed	3/11/2024	3/28/2024		Medium	High	Watch	6	Funding
RSK00000003 - 5001031	9/1/2019	Scope Change	Infrastructure must be completed. Delays here will cause us to miss Go Live	3/25/2024	4/8/2024		Low	Low	Watch	1	Implementation
RSK000000075 - 5012000	2/21/2024	Management Change		3/18/2025	4/1/2025		Low	Medium	Watch	2	Organizational
RSK000000141 - 5025016	6/23/2025	A New Risk		6/23/2025	6/23/2025		High	Medium	Watch	6	Funding
ABLE Payments Digital Experience - ID1020											
RSK000000051 - 5006009	5/25/2021	Sponsorship Risk		5/15/2023	5/26/2023		Low	Low	Watch	1	Sponsorship
RSK000000052 - 5006010	5/25/2021	Underfunded		4/14/2023	4/28/2023		Low	Medium	Watch	2	Funding
Analytics and ERP Implementation - PR2092											
RSK000000083 - 5015000	9/23/2024	Analytics Team Priorities		9/23/2025	10/1/2025		High	Low	Watch	3	Resource
RSK000000120 - 5022010	4/16/2025	Something could go really wrong		4/16/2025	4/16/2025		Low	Low	Watch	1	
AP Architecture Consolidation - PR2190											
RSK000000001 - 5030001	9/19/2025	Sponsorship Risk	Executive Steering Meetings are poorly attended	10/10/2022	10/10/2022		Low	Low	Watch	1	Sponsorship
RSK000000002 - 5030000	9/19/2025	Underfunded	Budget was approved lower than the original ask and we are unable to get the number of contractors needed	10/10/2022	10/10/2022		Low	Low	Watch	1	Funding
RSK000000003 - 5030004	9/19/2025	Dependent on Other work	Infrastructure must be completed. Delays here will cause us to miss Go Live	10/10/2022	10/10/2022		Low	Low	Watch	1	Interdependence
AP Architecture Consolidation Phase II - PR2191											

Project Risk Register

Project Risk Register (Risk Only)

Let Rego be your guide.

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Project Schedule

Project Schedule								Timeline							
OBS Type		OBS Path		Project(s)		Work Status		Project Status		Project Manager(s)		1/1/2025		8/31/2028	
All		All		All		All		All		All					
Project	Start Date	Finish Date	Project Status	Work Status	Project Manager	Days Late	Status	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025
ABLE Payments 2/0	1/17/2024	9/20/2029	Approved	Active	Arpel, Ian	1323									
Acme Managed Services	3/4/2024	11/19/2027	Approved	Active	Sanders, Pam	0									
Analytics and ERP Implementation	2/1/2024	5/14/2027	Unapproved	Active	Sanders, Pam	27									
Application for Tracking Implementations Project	1/21/2025	6/20/2025	Unapproved	Requested	Martin, Paul	88									
Audit the St Charles Office	6/3/2025	10/24/2025	Unapproved	Requested	Arpel, Ian	0									
BIAnywhere Release 10	2/26/2024	10/31/2026	Approved	On Hold	Martin, Paul	457									
Client- Professional Service	6/1/2025	6/21/2027	Rejected	Active	Werner, Bob	0									
Cybersecurity ISO27001 Audit	1/31/2025	12/7/2027	Approved	Active	Awad, Rashid	-106									
Digital Banking User Experience	2/16/2024	1/1/2026	Approved	Active	Clark, Patrick	0									
DPM Loan App Rel 4.0	2/9/2024	12/29/2025	Approved	Active	Clark, Patrick	0									
DPM Loan App Rel 5.0	7/1/2024	10/4/2025	Approved	On Hold	Clark, Patrick	0									
DPM Loan App Rel 6.0	1/1/2025	6/30/2025	Approved	Requested	Clark, Patrick	78									
eBusiness Mobile Network	4/17/2024	9/30/2025	Approved	Active	Grant, Lily	0									
eCommerce Portal	12/20/2023	10/27/2025	Approved	Active	Awad, Rashid	-242									
Electric Upgrade	7/1/2025	10/31/2025	Unapproved	Requested	Berks, Paul	0									
Email archival repository	3/3/2025	4/30/2026	Unapproved	Requested	Martin, Paul	34									
Email SAN Storage Implementation	3/12/2025	9/18/2025	Approved	On Hold	Riviera, Alex	0									
EMEA GDPR	1/1/2025	11/17/2025	Approved	Requested	Riviera, Alex	225									

Project Schedule (Cont.)



Project Schedule

OBS Type

All

OBS Path

All

Project(s)

All

Timeline

1/1/2025 8/31/2028

Work Status

All

Project Status

All

Project Manager(s)

All

Project	Sub-Project	Task	Start Date	Finish Date	Project Status	Work Status	Project Manager	Days Late	Status	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025
**Electric Upgrade	**Electric Upgrade	003-Planning Phase	7/1/2025	8/18/2025	Unapproved	Requested	Berks, Paul	67	●								
		009-Construction Phase	8/6/2025	9/16/2025	Unapproved	Requested	Berks, Paul	38	●								
		014-Deployment and Quality Phase	9/16/2025	10/6/2025	Unapproved	Requested	Berks, Paul	18	●								
ABLE Payments 2/0	ABLE Payments 2/0	006-Foliage Review	6/10/2025	9/19/2025	Approved	Active	Arpel, Ian	35	●								
		007-Planning Phase	1/26/2024	10/22/2025	Approved	Active	Arpel, Ian	58	●								
		011-Demo Task	9/2/2025	10/22/2025	Approved	Active	Arpel, Ian	2	●								
		016-Construction Phase	2/9/2024	6/15/2026	Approved	Active	Arpel, Ian	236	●								
		022-Deployment and Quality Phase	3/5/2024	9/20/2029	Approved	Active	Arpel, Ian	2005	●								
		026-Closing Phase	2/10/2025	8/5/2025	Approved	Active	Arpel, Ian	490	●								
	Foliage Review	003-Planning Phase	6/10/2025	7/28/2025	Unapproved	Requested	Arpel, Ian	88	●								
		009-Construction Phase	7/16/2025	8/26/2025	Unapproved	Requested	Arpel, Ian	59	●								
		014-Deployment and Quality Phase	8/26/2025	9/15/2025	Unapproved	Requested	Arpel, Ian	39	●								
Analytics and ERP Implementation	Analytics and ERP Implementation	001-Digital Banking User Experience	2/16/2024	1/1/2026	Unapproved	Active	Sanders, Pam	0	●								
		007-Engagement Requirements	2/1/2024	1/1/2026	Unapproved	Active	Sanders, Pam	0	●								
		015-Configuration Design Work	2/12/2024	10/23/2026	Unapproved	Active	Sanders, Pam	-89	●								

Project Schedule (Cont.)



Project Schedule

OBS Type

All

OBS Path

All

Project(s)

All

Timeline

1/1/2025 8/31/2028

Work Status

All

Project Status

All

Project Manager(s)

All

Project	Sub-Project	Task	Start Date	Finish Date	Project Status	Work Status	Project Manager	Days Late	Status	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025
**Electric Upgrade	**Electric Upgrade	012-Unit and Performance Testing	8/26/2025	9/15/2025	Unapproved	Requested	Berks, Paul	39	●								
		016-Usability and User Acceptance Testing	9/23/2025	10/6/2025	Unapproved	Requested	Berks, Paul	18	●								
ABLE Payments 2/0	ABLE Payments 2/0	008-Define Scope Change and Control Process	1/26/2024	7/14/2025	Approved	Active	Arpel, Ian	524	●								
		010-Requirements Definition	7/17/2025	9/1/2025	Approved	Active	Arpel, Ian	7	●								
		012-Operations Review	9/2/2025	10/22/2025	Approved	Active	Arpel, Ian	2	●								
		017-Database Development	2/9/2024	6/3/2025	Approved	Active	Arpel, Ian	459	●								
		019-Unit and Performance Testing	2/16/2024	6/15/2026	Approved	Active	Arpel, Ian	524	●								
		020-Coles User Group Demo Apr 2025	6/2/2025	7/9/2025	Approved	Active	Arpel, Ian	107	●								
		023-Functional and System Testing	3/5/2024	9/20/2029	Approved	Active	Arpel, Ian	1718	●								
		024-Usability and User Acceptance Testing	3/18/2024	7/24/2025	Approved	Active	Arpel, Ian	-90	●								

Project Schedule (Cont.)



Project Schedule

OBS Type

All

OBS Path

All

Project(s)

All

Timeline

1/1/2025

8/31/2028

Work Status

All

Project Status

All

Project Manager(s)

All

Project	Sub-Project	Task	Resource	Start Date	Finish Date	Project Status	Work Status	Project Manager	Days Late	Status	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul
**Electric Upgrade	**Electric Upgrade	003-Planning Phase				Unapproved	Requested	Berks, Paul	67	●							
		009-Construction Phase				Unapproved	Requested	Berks, Paul	38	●							
		012-Unit and Performance Testing				Unapproved	Requested	Berks, Paul	39	●							
		014-Deployment and Quality Phase				Unapproved	Requested	Berks, Paul	18	●							
		016-Usability and User Acceptance Testing	Business Analyst	9/23/2025	10/6/2025	Unapproved	Requested	Berks, Paul	18	●							
ABLE Payments 2/0	ABLE Payments 2/0	006-Foliage Review				Approved	Active	Arpel, Ian	35	●							
		007-Planning Phase				Approved	Active	Arpel, Ian	58	●							
		008-Define Scope	AI Team	1/26/2024	2/6/2024	Approved	Active	Arpel, Ian	524	●							
		Change and Control Process	Lewis, Dana	1/26/2024	2/6/2024	Approved	Active	Arpel, Ian	524	●							
			Morris, Tom	7/14/2025	7/14/2025	Approved	Active	Arpel, Ian	524	●							
		010-Requirements Definition	Riviera, Alex	7/17/2025	9/1/2025	Approved	Active	Arpel, Ian	7	●							
			Travel	7/17/2025	9/1/2025	Approved	Active	Arpel, Ian	7	●							
		011-Demo Task				Approved	Active	Arpel, Ian	2	●							
		012-Operations Review	Riviera, Alex	9/2/2025	10/22/2025	Approved	Active	Arpel, Ian	2	●							
		016-Construction Phase				Approved	Active	Arpel, Ian	236	●							

Project Status Report List



Last Refreshed: 9/4/2025 10:28:50 AM

Include Programs?

Select all Non Program Program

Include Inactive Projects?

Select all Active Inactive

Project OBS

All

Project Type

All

Project Status

All

Portfolio Category 1

All

Project Manager

All

Work Status

All

Portfolio Category 2

All

Sponsor

All

Overall Status

All

Portfolio Category 3

All

Project

All

Status Reporting

All

Portfolio Category 4

All

Group By

Project Type

Stage

All

Overall Status Summary



Overall Status (Project Type)



Project Type	Project Manager	Start	Finish	Work Status	Report Date	Status Report	Overall Status	Schedule	Scope	Cost and Effort
Major Project										
Application for Tracking Implementations Project	Martin, Paul	1/21/2025	6/20/2025	Requested	1/27/2025	Not Required	🔴	🔴	🔴	🔴
eBusiness Mobile Network	Grant, Lily	4/17/2024	9/30/2025	Active	11/19/2024	Not Required	🟢	🟢	🟢	🟢
eCommerce Portal	Awad, Rashid	12/20/2023	10/27/2025	Active	8/14/2025	Not Required	🟢	🟢	🟢	🟢
EMEA GDPR Certifications	Riviera, Alex	1/1/2025	11/17/2025	Requested	11/18/2024	Not Required	🔴	🔴	🔴	🔴
Financial Process Audit	Berks, Paul	1/1/2025	3/5/2025	Requested	1/1/2024	Not Required	🔴	🔴	🔴	🔴
GDPR Certification - Monetary App	Arpel, Ian	1/17/2024	5/16/2024	Active	6/7/2023	Not Required	🟡	🟡	🟡	🟡
Migrate *MSP Services to SaaS	Fowler, Ray	1/1/2025	9/1/2025	Active	2/6/2024	Not Required	🟡	🟡	🟡	🟡
Relocate Infrastructure to Las Vegas Data Center	Granger, Paula	6/24/2024	8/7/2025	On Hold	2/6/2024	Not Required	🟡	🟢	🟢	🟢
Upgrade to DoD IL 4 compliance	Amos, Cheryl	1/1/2025	3/6/2025	Active	11/18/2024	Not Required	🟢	🟢	🟢	🟢
GDPR Compliance - Loan Applications	Clark, Patrick	4/1/2024	4/1/2026	Active	1/2/2025	Not Required	🟢	🟢	🟢	🟢
Product Development										
Analytics and ERP Implementation	Sanders, Pam	2/1/2024	5/14/2027	Active	5/13/2025	Not Required	🟡	🔴	🟡	🟢
Minimal Online Shopping Release 4.0	Clark, Patrick	1/29/2024	8/19/2026	Active	1/8/2025	Not Required	🟡	🟡	🔴	🟡
BIAnywhere Release 10	Martin, Paul	2/26/2024	10/31/2026	On Hold	9/23/2024	Not Required	🟢	🟢	🟢	🟢
Cybersecurity ISO27001 Audit	Awad, Rashid	1/31/2025	12/7/2027	Active	9/23/2024	Not Required	🟢	🔴	🔴	🔴
Digital Banking User Experience	Clark, Patrick	2/16/2024	1/1/2026	Active	3/30/2025	Not Required	🟢	🟢	🟢	🟢
DPM Loan App Rel 4.0	Clark, Patrick	2/9/2024	12/29/2025	Active	6/26/2025	Not Required	🟢	🟡	🟡	🟢
Product Launch	Donegal, Amy	12/1/2024	11/30/2025	Active	2/24/2024	Not Required	🟡	🟢	🟢	🟡
Release										
Email SAN Storage Implementation	Riviera, Alex	3/12/2025	9/18/2025	On Hold	1/15/2025	Not Required	🟡	🟡	🟡	🟢
Migrate AARD from New York Data Center	Arpel, Ian	8/9/2024	1/17/2026	Requested	1/18/2024	Not Required	🟢	🟢	🟢	🟢
Migrate CRM Services to SaaS	Riviera, Alex	11/18/2024	2/1/2026	On Hold	11/18/2024	Not Required	🟢	🟢	🟢	🟢
Small Project										

KPIs by Project Type



KPIs by Project Type

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Project OBS

All

Project Type

All

Project Manager

All

Project Name

All

Project Status

All

Include Inactive Projects?

All

Include Inactive Resources?

All

Project Type	Project Manager	Start Date	Finish Date	Overall	Schedule	Alignment	Risk	Resource Allocations	Resource Actuals
Major Project								317,390.58	3,136.80
Application for Tracking Implementations Project	Martin, Paul	1/21/2025	6/20/2025	🔴	🔴	🟡	🟢	1,956.00	0.00
Client - Professional Service	Werner, Bob	6/1/2025	6/21/2027	🟢	🟢	🟢	🟢	14,150.40	240.00
eBusiness Mobile Network	Grant, Lily	4/17/2024	9/30/2025	🟢	🟡	🟢	🟢	12,832.00	0.00
eCommerce Portal	Awad, Rashid	12/20/2023	10/27/2025	🟡	🟢	🟢	🟢	9,748.40	1,940.80
Electric Upgrade	Berks, Paul	7/1/2025	10/31/2025	🟢	🟢	🟢	🟢	2,581.00	0.00
Email archival repository	Martin, Paul	3/3/2025	4/30/2026	🟢	🔴	🟡	🟢	7,536.40	90.00
EMEA GDPR Certifications	Riviera, Alex	1/1/2025	11/17/2025	🟢	🔴	🟢	🔴	9,152.00	0.00
Exterior Review Project	Berks, Paul	4/16/2025	11/12/2025	🟢	🟢	🟢	🟢	9,664.00	0.00
Financial Process Audit	Berks, Paul	1/1/2025	3/5/2025	🔴	🔴	🟢	🟡	976.00	0.00
Foliage Review	Arpel, Ian	6/10/2025	9/19/2025	🟢	🔴	🟢	🟢	4,592.00	0.00
GDPR Certification - Monetary App	Arpel, Ian	1/17/2024	5/16/2024	🟡	🔴	🟢	🟢	0.00	0.00
GDPR Compliance - Loan Applications	Clark, Patrick	4/1/2024	4/1/2026	🟢	🔴	🟢	🟡	8,867.40	606.00
Global X Acquisition	Higgins, Tanya	3/14/2024	10/27/2025	🟢	🟢	🟡	🟡	13,646.00	0.00
HR Integration	Baker, Isaac	3/14/2024	6/9/2025	🟢	🔴	🔴	🟢	11,990.00	0.00
Integration for data	Berks, Paul	7/22/2025	10/31/2025	🟢	🟢	🟢	🟢	4,144.00	0.00
Integration M&A Workstream	Higgins, Tanya	3/13/2024	1/24/2025	🟢	🔴	🔴	🟡	8,832.00	0.00
Launch OD Version 14 Project	Martin, Paul	3/9/2025	3/3/2026	🟢	🟢	🔴	🟢	30,840.00	0.00
Migrate *MSP Services to SaaS	Fowler, Ray	1/1/2025	9/1/2025	🟡	🔴	🟢	🟢	8,488.00	0.00
New Merger Project - Falcon	Arpel, Ian	1/3/2024	5/6/2024	🟢	🔴	🟡	🔴	6,408.00	0.00
New SFDC Upgrade Project	Martin, Paul	7/15/2025	10/24/2025	🟢	🟢	🟡	🟢	5,328.00	0.00
Partner Channel Development - Australia	Rodriguez, Anita	7/15/2024	9/17/2024	🟢	🔴	🟢	🟢	0.00	0.00
Program Example	Martin, Paul	7/21/2025	11/24/2026	🟢	🟢	🔴	🟢	80,592.00	0.00
Rego MSP Plan	Werner, Bob	8/11/2025	11/20/2025	🟢	🟢	🟢	🟢	4,144.00	0.00
Relocate Infrastructure to Las Vegas Data Center	Granger, Paula	6/24/2024	10/6/2025	🟡	🟢	🟢	🟡	11,827.20	240.00
Report Writer Enhancements	Arpel, Ian	5/1/2025	5/1/2026	🟢	🟢	🟡	🟢	18,935.78	0.00
Upgrade Databases	Berks, Paul	8/7/2025	11/18/2025	🟢	🟢	🟢	🟢	4,144.00	0.00
Upgrade to DoD IL 4 compliance	Amos, Cheryl	1/1/2025	3/6/2025	🟢	🔴	🟢	🟡	2,256.00	0.00
Zeus 2 Project	Arpel, Ian	3/3/2025	2/23/2026	🟢	🟢	🟢	🟢	8,656.00	20.00
Zeus Project	Arpel, Ian	3/1/2025	8/13/2025	🟢	🔴	🟢	🟢	7,552.00	0.00
Zeus Web Project	Arpel, Ian	3/3/2025	2/23/2026	🟢	🟢	🟢	🟢	7,552.00	0.00
Product Development								245,063.95	8,879.37
Analytics and ERP Implementation	Sanders, Pam	2/1/2024	5/14/2027	🟡	🔴	🟢	🟡	45,142.80	595.00
BIAnywhere Release 10	Martin, Paul	2/26/2024	10/31/2026	🟢	🔴	🟡	🟢	27,321.34	100.00
Cybersecurity ISO27001 Audit	Awad, Rashid	1/31/2025	12/7/2027	🟡	🟢	🟢	🟢	2,012.57	0.00
Digital Banking User Experience	Clark, Patrick	2/16/2024	1/1/2026	🟢	🟢	🟡	🟡	2,634.50	1,156.00
DPM Loan App Rel 4.0	Clark, Patrick	2/9/2024	12/29/2025	🟡	🟢	🟡	🟡	4,646.53	3,795.00
DPM Loan App Rel 5.0	Clark, Patrick	7/1/2024	10/4/2025	🟢	🟡	🟡	🔴	8,108.00	44.00
DPM Loan App Rel 6.0	Clark, Patrick	1/1/2025	6/30/2025	🟢	🔴	🟡	🟡	2,228.00	30.00
Enterprise Applications	Berks, Paul	8/25/2025	10/28/2025	🟢	🟢	🟢	🟢	3,008.00	0.00
iSeries Device Tracking	Martin, Paul	3/11/2025	10/29/2026	🟢	🟢	🟡	🟢	30,812.00	0.00
Krinner Demo	Surmann, Havlev	7/10/2025	3/1/2027	🟢	🟢	🟡	🟢	29,044.00	0.00
Total								870,709.46	15,208.17

Let Rego be your guide.

regoUniversity2026

Key Task and Milestone Status

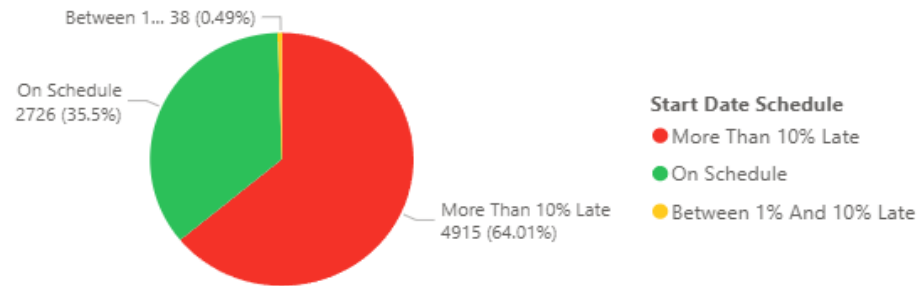
Key Task and Milestones

OBS Type
 OBS Path
 Project(s)
 Project Manager(s)

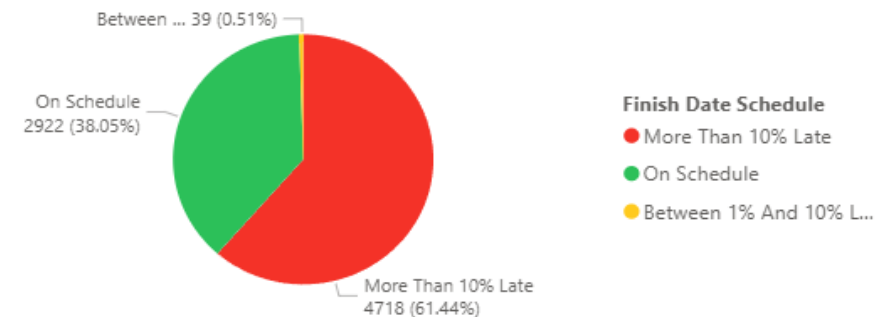
Project Is Active?
 Project Status
 Task Status

Is Late?
 WBS Type

Task by Start Date Schedule



Task by Finish Date Schedule



Project	Project Status	Project Manager	Task	WBS Type	Status	Is Key?	Is Milestone?	% Complete	Baseline?	Start Date	Start Days Late	Start Days Late %	Finish Date
**Electric Upgrade	Unapproved	Berks, Paul	Closing Phase	Phase	Not Started	✓		0.00	✓	10/2/2025	110	●	10/10/2025
			Closing Phase Gate Complete	Milestone	Not Started	✓	✓	0.00	✓	10/10/2025	102	●	10/10/2025
			Complete Project Plan	Task	Not Started			0.00	✓	7/22/2025	182	●	7/28/2025
			Construction Phase	Phase	Not Started	✓		0.00	✓	8/6/2025	167	●	9/16/2025
			Construction Phase Gate Complete	Milestone	Not Started	✓	✓	0.00	✓	9/16/2025	126	●	9/16/2025
			Database Development	Task	Not Started			0.00	✓	8/6/2025	167	●	8/11/2025
			Define Scope Change and Control Process	Task	Not Started			0.00	✓	7/1/2025	203	●	7/7/2025
			Deployment and Quality Phase	Phase	Not Started	✓		0.00	✓	9/16/2025	126	●	10/6/2025
			Deployment Phase Gate Complete	Milestone	Not Started	✓	✓	0.00	✓	10/6/2025	106	●	10/6/2025

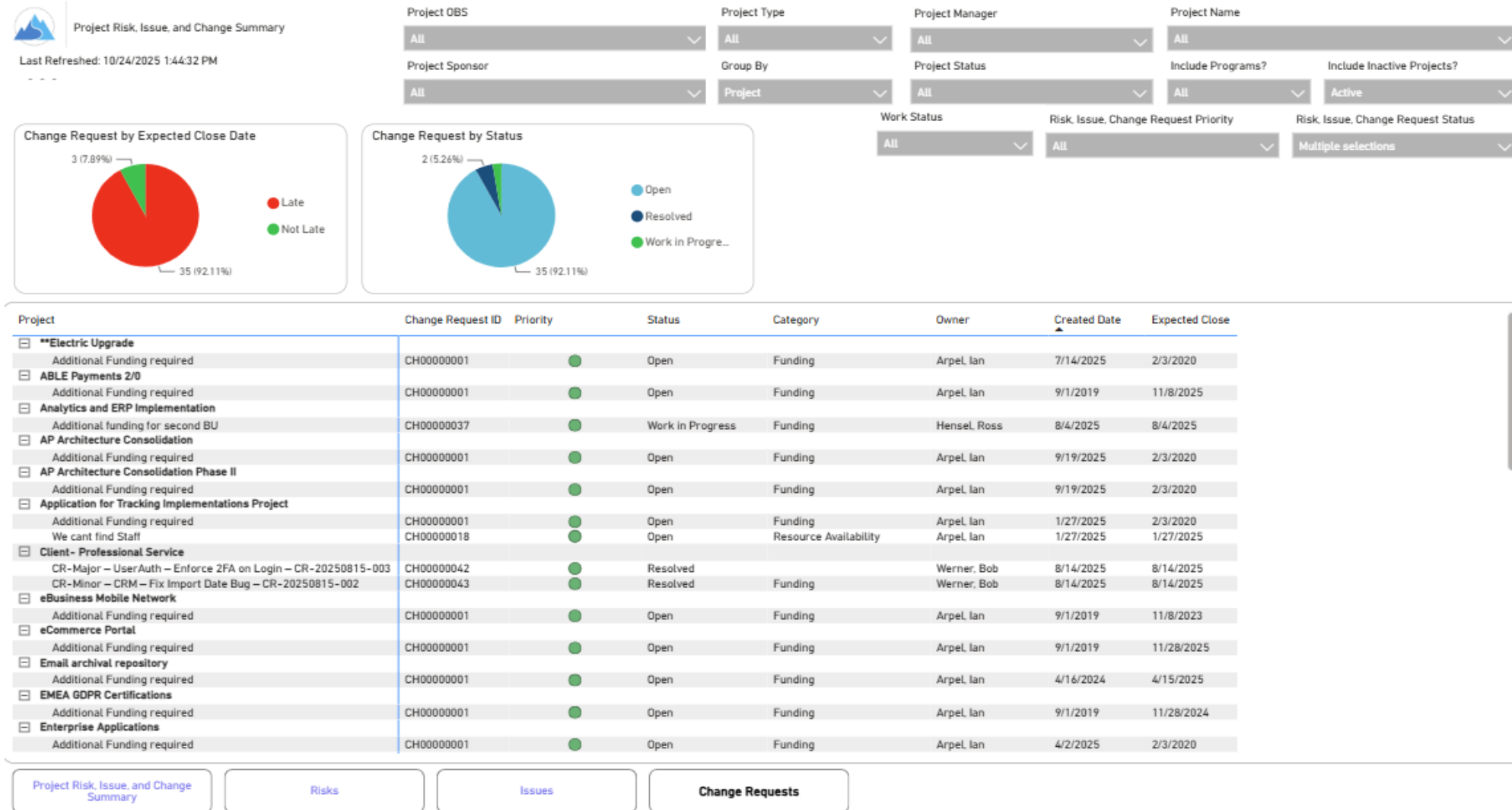
Project Risk, Issue, and Change Summary



Project Risk, Issue, and Change Summary (Cont.)



Project Risk, Issue, and Change Summary (Cont.)



Project Status Detail



Project Status Detail

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Projects available to select: 78

Project Name

eCommerce Portal - PR2007

Amount Type

Hours

Project OBS

All

Project Manager

All

Work Status

All

Risk, Issue, Change Request Priority

All

Include Inactive Resources?

All

Project Status

All

Risk, Issue, Change Request Status

All

Include Inactive Projects?

Active

Project Status Detail: eCommerce Portal

eCommerce Portal

Project ID	PR2007
Project Manager	Awad, Rashid
Project Type	Major Project
Project Goal	Grow the Business

eCommerce Portal

Report Date	8/14/2025
Previous Report Date	7/15/2025
Project Investment Status	Approved
Project Progress	Not Started

Project Stage and Dates

eCommerce Portal	
Stage	Planning
Finish Date	10/27/2025
Days Late	-242
Baseline Finish Date	6/26/2026

Status Report Indicators

eCommerce Portal	
Overall	⬆️
Schedule	⬆️
Scope	⬆️
Cost and Effort	⬆️

Status Report Update

Report Update

eCommerce Portal	Building on our success in Q2, our focus for the next quarter will be on scaling our operations and further enriching the customer experience.
------------------	--

Project Hours

eCommerce Portal	
Actuals	1,940.80
Baseline	1,732.80
EAC	2,040.80
ETC	100.00
Projected Effort Variance	308.00
Projected Effort Variance	0.18

Project Indicators

eCommerce Portal	
Schedule to Baseline	●
Alignment	●
Risk	●
Issue	◆
Change	●

Project Objective

Objective

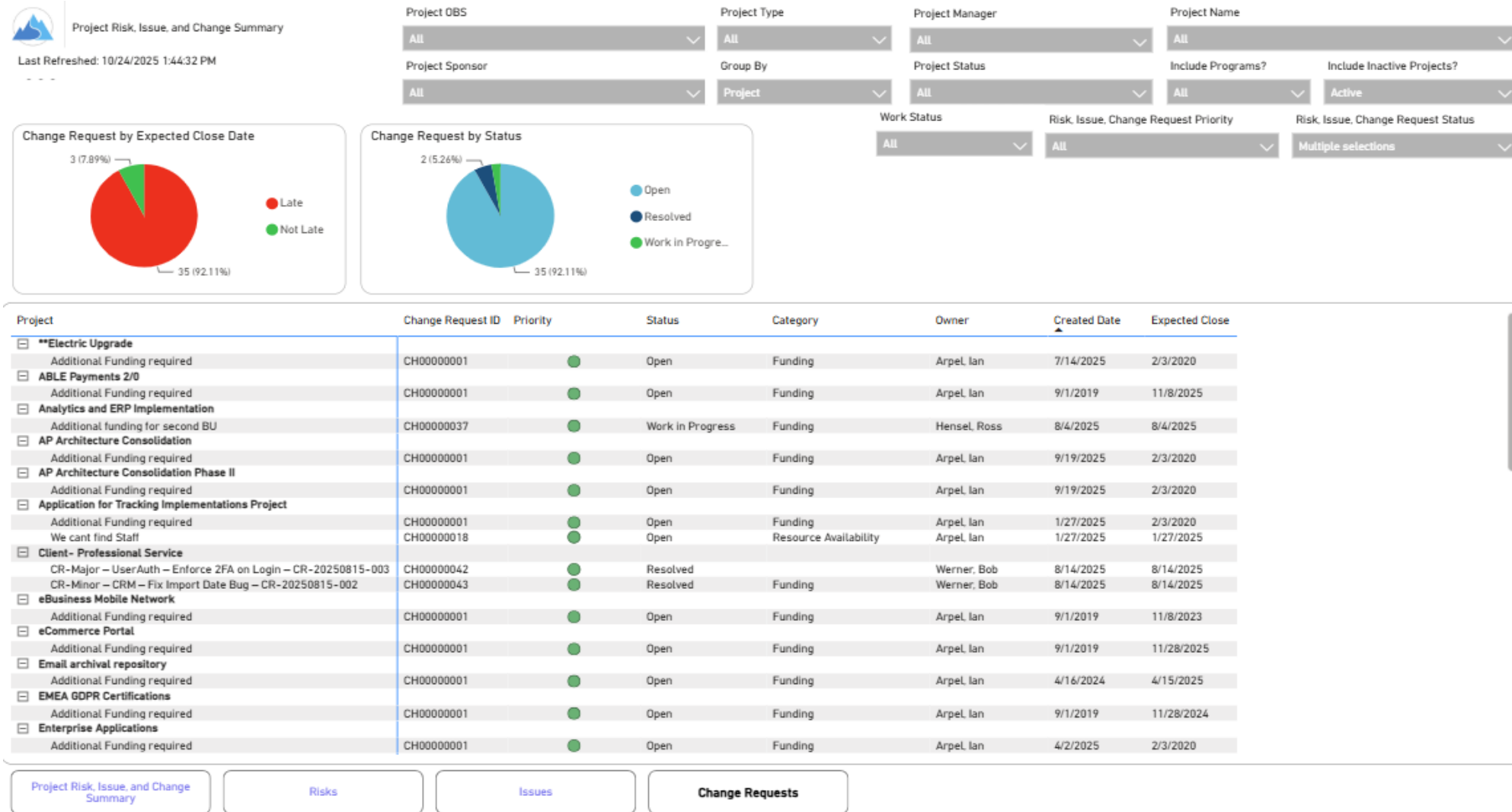
eCommerce Portal	Development of a new portal for all Online Client Services.
------------------	---

Project Status Detail

Project Team and Key Milestones

Risks, Issues, and Change Requests

Project Status Detail (Cont.)



Project Status Detail (Cont.)



Project Status Detail

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Project Name

eCommerce Portal - PR2007

Project OBS

All

Project Manager

All

Work Status

All

Risk, Issue, Change Request Priority

All

Include Inactive Resources?

All

Project Status

All

Risk, Issue, Change Request Status

All

Include Inactive Projects?

Active

Project Status Detail: eCommerce Portal

Risks

Project Name	Risk ID	Description	Priority	Probability	Impact	Status	Response Type	Target Resolution
eCommerce Portal								
Dependent on Other work	RSK00000003	Infrastructure must be completed. Delays here will cause us to miss Go Live	Low	High	Low	Open	Watch	3/17/2025
Sponsorship Risk	RSK00000001	Executive Steering Meetings are poorly attended	Low	Low	Medium	Open	Watch	3/17/2025
Underfunded	RSK00000002	Budget was approved lower than the original ask and we are unable to get the number of contractors needed	Medium	Low	Medium	Open	Watch	3/17/2025

Issues

Project Name	Issue ID	Description	Priority	Status	Target Resolution
eCommerce Portal					
	Critical resource is unavailable	IS00000001	Low	Open	12/4/2025
	Integration with secure payment gateways for better payment processing	IS00000002	Low	Open	12/4/2025
	Requirements are unclear	IS00000003	Medium	Open	12/4/2025
	System Architecture is non-compliant	IS00000004	High	Open	12/4/2025

Change Requests

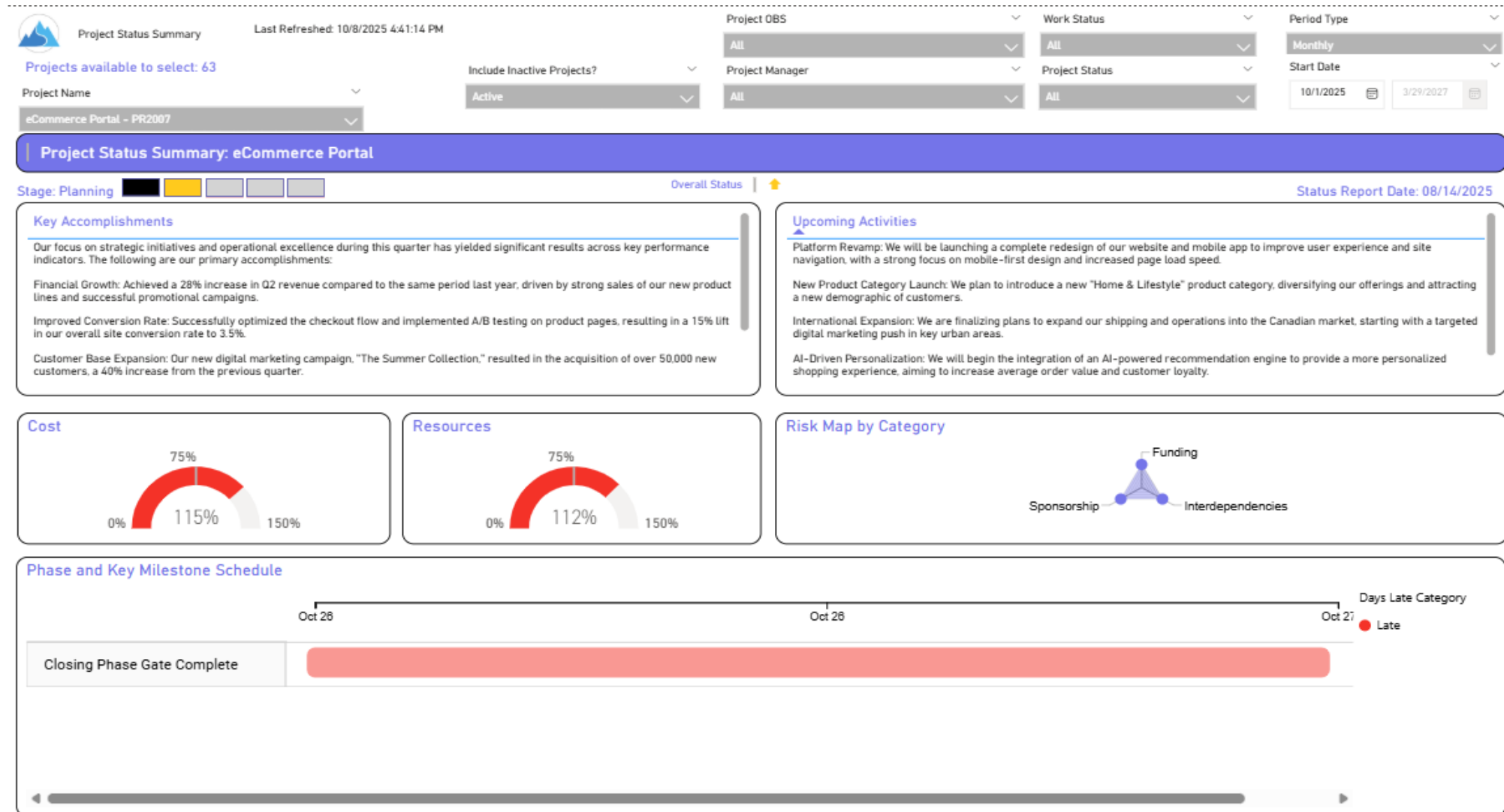
Project Name	Change Request ID	Description	Priority	Status	Expected Close
eCommerce Portal					
	Additional Funding required	CH00000001	Low	Open	11/28/2025

Project Status Detail

Project Team and Key Milestones

Risks, Issues, and Change Requests

Project Status Summary



Financial Management

Financial Budget vs. Forecast by Period



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Investment OBS
All
Financial Plan Type
Budget
Financial Plan Group By 1
Resource Name

Investment Manager
All
Financial Year
2024
Financial Plan Group By 2
Charge Code

Investment
All
Fiscal Period Type
Monthly
Include Inactive Investments?
All

Investment Status
All
Investment Type
All

Resource Name	1/31/2024	2/29/2024	3/31/2024	4/30/2024	5/31/2024	6/30/2024	7/31/2024	8/31/2024	9/30/2024	10/31/2024	11/30/2024	12/31/2024	Total
Berry, Jason													
Budget		0.00	0.00										0.00
Forecast		39,199.99	10,400.00										49,599.99
Variance		-39,199.99	-10,400.00										-49,599.99
Management													
Budget		0.00	0.00										0.00
Forecast		39,199.99	10,400.00										49,599.99
Variance		-39,199.99	-10,400.00										-49,599.99
Carmen, Ed													
Budget	15,600.00	9,360.00	1,040.00										26,000.00
Forecast	15,600.00	7,280.00	0.00										22,880.00
Variance	0.00	2,080.00	1,040.00										3,120.00
Management													
Budget	0.00	0.00											0.00
Forecast	15,600.00	7,280.00											22,880.00
Variance	-15,600.00	-7,280.00											-22,880.00
Undefined													
Budget	15,600.00	9,360.00	1,040.00										26,000.00
Forecast	0.00	0.00	0.00										0.00
Variance	15,600.00	9,360.00	1,040.00										26,000.00
Childers, Valerie													
Budget	6,000.00												6,000.00
Forecast	6,000.00												6,000.00
Variance	0.00												0.00
Management													
Budget	0.00												0.00
Forecast	6,000.00												6,000.00
Variance	-6,000.00												-6,000.00
Undefined													
Budget	6,000.00												6,000.00
Forecast	0.00												0.00
Variance	6,000.00												6,000.00
Cohen, Rita													
Budget				0.00									0.00
Forecast				18,000.00									18,000.00
Variance				-18,000.00									-18,000.00
Develop													
Budget	550,623.95	1,773,560.87	1,980,893.70	2,098,685.59	1,575,423.47	1,457,937.36	1,517,268.35	1,237,076.51	1,102,057.86	1,123,992.00	545,544.00	554,808.00	15,517,871.67
Forecast	134,504.64	1,242,931.46	877,528.08	204,500.00	10,000.00	0.00	0.00	0.00	0.00	0.00	6,750.00	0.00	2,476,214.18
Variance	416,119.31	530,629.41	1,103,365.62	1,894,185.59	1,565,423.47	1,457,937.36	1,517,268.35	1,237,076.51	1,102,057.86	1,123,992.00	538,794.00	554,808.00	13,041,657.49

Financial Budget vs. Forecast by Period Detail



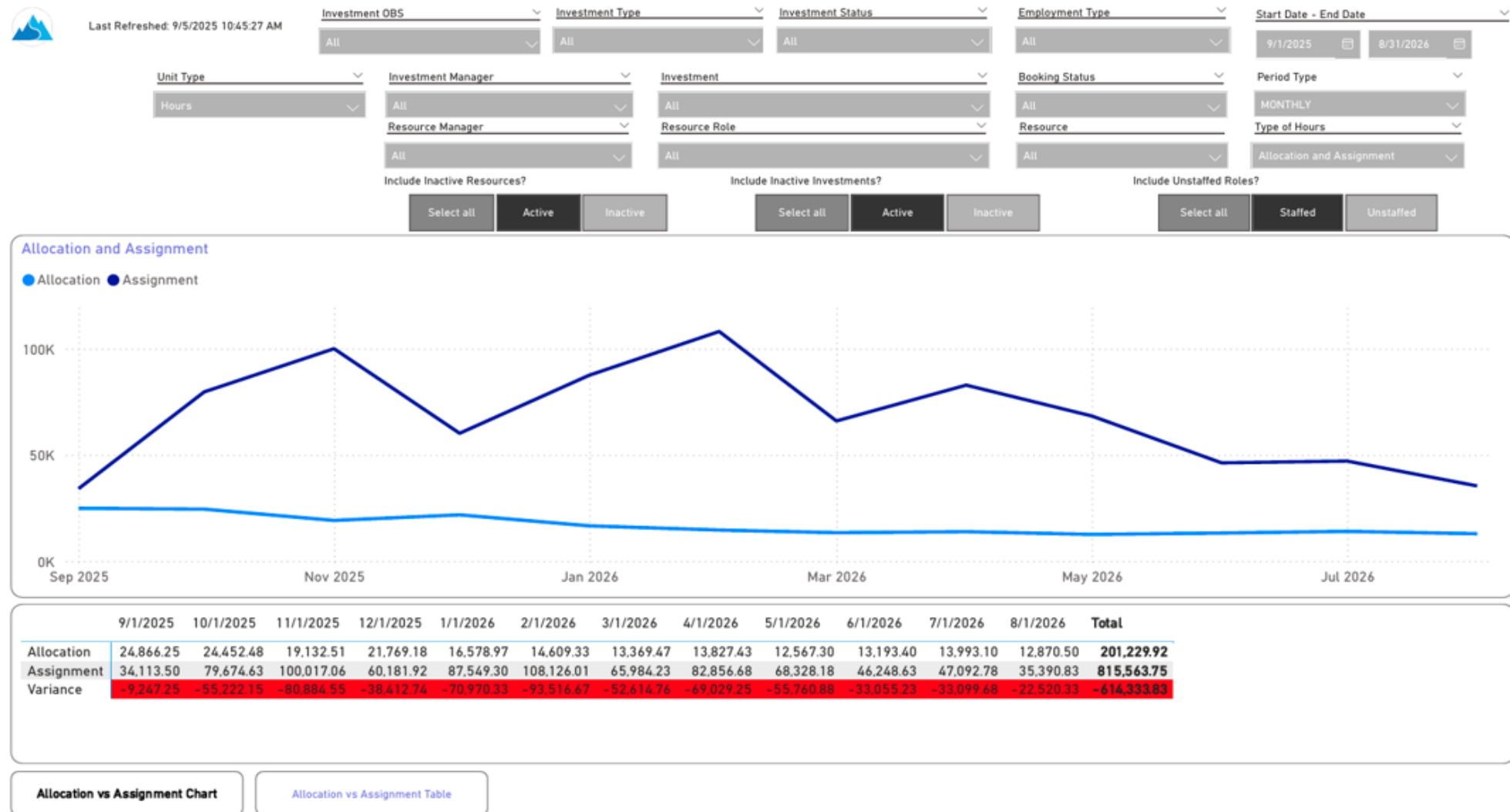
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Investment OBS	Investment Manager	Investment	Investment Status
All	All	All	All
Financial Plan Type	Financial Year	Fiscal Period Type	Investment Type
Budget	2024	Monthly	All
Financial Plan Group By 1	Financial Plan Group By 2	Include Inactive Investments?	
Charge Code	Cost Type	Active	

Charge Code	1/31/2024	2/29/2024	3/31/2024	4/30/2024	5/31/2024	6/30/2024	7/31/2024	8/31/2024	9/30/2024	10/31/2024	11/30/2024	12/31/2024	Total
Design													
Budget	0.00	0.00	0.00										0.00
Forecast	137,115.00	195,510.00	69,300.00										401,925.00
Variance	-137,115.00	-195,510.00	-69,300.00										-401,925.00
Capital													
Budget	0.00	0.00	0.00										0.00
Forecast	137,115.00	195,510.00	69,300.00										401,925.00
Variance	-137,115.00	-195,510.00	-69,300.00										-401,925.00
DPM Loan App Rel 4.0 - PR2002													
Budget	0.00	0.00	0.00										0.00
Forecast	137,115.00	195,510.00	69,300.00										401,925.00
Variance	-137,115.00	-195,510.00	-69,300.00										-401,925.00
Develop													
Budget	0.00	0.00	0.00	0.00									0.00
Forecast	36,080.64	569,732.46	479,854.08	82,400.00									1,168,067.18
Variance	-36,080.64	-569,732.46	-479,854.08	-82,400.00									-1,168,067.18
Capital													
Budget	0.00	0.00	0.00	0.00									0.00
Forecast	36,080.64	569,732.46	479,854.08	82,400.00									1,168,067.18
Variance	-36,080.64	-569,732.46	-479,854.08	-82,400.00									-1,168,067.18
ABLE Payments 2/0 - PR2009													
Budget			0.00										0.00
Forecast			6,600.00										6,600.00
Variance			-6,600.00										-6,600.00
Digital Banking User Experience - PR2024													
Budget			0.00	0.00									0.00
Forecast			72,000.00	68,400.00									140,400.00
Variance			-72,000.00	-68,400.00									-140,400.00
DPM Loan App Rel 4.0 - PR2002													
Budget		0.00	0.00										0.00
Forecast		262,980.00	281,625.00										544,605.00
Variance		-262,980.00	-281,625.00										-544,605.00
GDPR Compliance - Loan Applications - PR2010													
Budget				0.00									0.00
Forecast				14,000.00									14,000.00
Variance				-14,000.00									-14,000.00
Minimal Online Shopping Release 4.0 - PR2021													
Budget	550,623.95	1,773,560.87	1,980,893.70	2,098,685.59	1,575,423.47	1,457,937.36	1,517,268.35	1,237,076.51	1,102,057.86	1,123,992.00	545,544.00	554,808.00	15,517,871.67
Forecast	134,504.64	1,242,931.46	877,528.08	204,500.00	10,000.00	0.00	0.00	0.00	0.00	0.00	6,750.00	0.00	2,476,214.18
Variance	416,119.31	530,629.41	1,103,365.62	1,894,185.59	1,565,423.47	1,457,937.36	1,517,268.35	1,237,076.51	1,102,057.86	1,123,992.00	538,794.00	554,808.00	13,041,657.49

Investment Management

Investment Allocations and Assignments



Investment Allocations and Assignments (Cont.)


 Last Refreshed: 10/24/2025 2:48:28 PM

Investment OBS:
 Investment Type:
 Investment Status:
 Employment Type:
 Start Date - End Date:

Unit Type:
 Investment Manager:
 Investment:
 Booking Status:
 Period Type:

Resource Manager:
 Resource Role:
 Resource:
 Type of Hours:

Include Inactive Resources?:
 Include Inactive Investments?:
 Include Unstaffed Roles?:

Investment Name	9/1/2025	10/1/2025	11/1/2025	12/1/2025	1/1/2026	2/1/2026	3/1/2026	4/1/2026	5/1/2026	6/1/2026	7/1/2026	8/1/2026	Total
☐ **Electric Upgrade													
Allocation	814.00	851.00											1,665.00
Assignment	0.00	0.00											0.00
Variance	814.00	851.00											1,665.00
Blackhawks Team													
Allocation	462.00	483.00											945.00
Assignment	0.00	0.00											0.00
Variance	462.00	483.00											945.00
Childers, Valerie													
Allocation	352.00	368.00											720.00
Assignment	0.00	0.00											0.00
Variance	352.00	368.00											720.00
☐ ABLE Payments 2/0													
Allocation	5,417.68	5,653.86	4,733.63	5,442.18	4,946.10	4,496.45	4,946.10	6,289.06	6,003.19	6,289.06	6,574.93	6,003.19	66,795.44
Assignment	551.89	911.73	533.75	613.81	323.12	293.75	323.12	499.12	476.44	440.44	406.93	371.55	5,745.65
Variance	4,865.80	4,742.13	4,199.88	4,828.36	4,622.97	4,202.70	4,622.97	5,789.94	5,526.76	5,848.63	6,168.00	5,631.65	61,049.79
AI Team													
Allocation	1,232.00	1,288.00	1,120.00	1,288.00	1,232.00	1,120.00	1,232.00	1,232.00	1,176.00	1,232.00	1,288.00	1,176.00	14,616.00
Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Variance	1,232.00	1,288.00	1,120.00	1,288.00	1,232.00	1,120.00	1,232.00	1,232.00	1,176.00	1,232.00	1,288.00	1,176.00	14,616.00
Arpel, Ian													
Allocation	176.00	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00	2,088.00
Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Variance	176.00	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00	2,088.00
Allocation	53,182.76	52,758.56	41,993.89	48,046.86	41,719.88	37,464.71	38,510.38	38,968.34	35,205.44	36,838.31	38,712.78	34,214.78	497,616.71
Assignment	41,933.52	88,507.50	107,186.93	68,184.87	95,418.55	115,279.88	73,853.49	90,725.94	75,839.75	54,117.88	55,319.72	42,944.40	909,312.42
Variance	11,249.24	-35,748.94	-65,193.05	-20,138.00	-53,698.67	-77,815.17	-35,343.11	-51,757.59	-40,634.30	-17,279.57	-16,606.94	-8,729.61	-411,695.71

[Allocation vs Assignment Chart](#)
[Allocation vs Assignment Table](#)

Investment Assignments by Task



Investment Assignments by Task

Last Refreshed: 11/9/2025 2:00:26 PM

Investment OBS All	Investment Type All	Investment Manager All	Investment All
Investment Status All	Resource Manager All	Resource Role All	Resource All
Task Start Date 11/1/2025 3/30/2027	Employment Type All	Booking Status All	Task Status All
	Include Unstaffed Roles? Yes	Include Inactive Investments? Active	Include Inactive Resources? Active

Investment Name	Task Name	Task Status	Pct Complete	Resource Name	Role Name	Task Start Date	Task Finish Date	Actuals	ETC Hours	EAC Hours
Analytics and ERP Implementation	Functional Configuration Testing	Not Started	0.00	Krishna, Sai	QA	5/18/2026	9/22/2026	0.00	112.00	112.00
				McKay, Erin	Architect	5/18/2026	9/22/2026	0.00	112.00	112.00
				Sanders, Pam	Project Manager	5/18/2026	9/22/2026	0.00	112.00	112.00
	Hardware Acquisition	Not Started	0.00	Sanders, Pam	Project Manager	7/20/2026	10/23/2026	0.00	40.00	40.00
				Lever, Ed	Engineer	10/6/2026	10/12/2026	0.00	40.00	40.00
	Phase 1 Release	Not Started	0.00	McKay, Erin	Architect	11/4/2025	11/18/2025	0.00	40.00	40.00
				Sanders, Pam	Project Manager	8/3/2026	9/3/2026	0.00	40.00	40.00
	Phase 2 Release	Not Started	0.00	Thompson, Peter	Engineer	10/6/2026	10/12/2026	0.00	40.00	40.00
				Lever, Ed	Engineer	10/13/2026	10/19/2026	0.00	40.00	40.00
				McKay, Erin	Architect	11/18/2025	12/2/2025	0.00	40.00	40.00
				Sanders, Pam	Project Manager	9/4/2026	9/17/2026	0.00	40.00	40.00
				Thompson, Peter	Engineer	10/13/2026	10/19/2026	0.00	40.00	40.00
	Platform Testing	Not Started	0.00	Krishna, Sai	QA	12/23/2025	11/6/2026	0.00	80.00	80.00
	Post Go Live Support	Not Started	0.00	Sanders, Pam	Project Manager	12/23/2025	11/6/2026	0.00	80.00	80.00
				Lever, Ed	Engineer	9/22/2026	10/5/2026	0.00	80.00	80.00
	Train the Trainer Classes	Not Started	0.00	Sanders, Pam	Project Manager	11/21/2025	12/18/2025	0.00	80.00	80.00
				Thompson, Peter	Engineer	8/10/2026	10/5/2026	0.00	80.00	80.00
	Training Support	Not Started	0.00	McKay, Erin	Architect	3/11/2027	4/15/2027	0.00	80.00	80.00
				Lever, Ed	Engineer	10/20/2026	10/27/2026	0.00	48.00	48.00
	User Training Plan	Not Started	0.00	Thompson, Peter	Engineer	10/20/2026	10/27/2026	0.00	48.00	48.00
				McKay, Erin	Architect	10/19/2026	5/14/2027	0.00	56.00	56.00
				Sanders, Pam	Project Manager	10/19/2026	5/14/2027	0.00	56.00	56.00
	Total							0.00	1,384.00	1,384.00
DPM Loan App Rel 4.0	Big Room Planning	Not Started	0.00	Mobile Team		12/12/2025	12/12/2025	0.00	224.00	224.00
	Identify Enhancement Candidates	Not Started	0.00	Parker, Ashley	Product Manager	12/12/2025	12/18/2025	0.00	32.00	32.00
	Marketing GTM	Not Started	0.00	Parker, Ashley	Product Manager	12/18/2025	12/23/2025	0.00	28.95	28.95
	Partner Readiness - GTM	Not Started	0.00	Parker, Ashley	Product Manager	12/23/2025	12/29/2025	0.00	31.58	31.58
	Product Owner Defines High level features	Not Started	0.00	Parker, Ashley	Product Manager	11/28/2025	12/12/2025	0.00	80.00	80.00
	Total							0.00	396.53	396.53
Integrated SAP Release 5.0	Analytics and Integration	Not Started	0.00	Global Delivery	Engineer	7/15/2026	8/14/2026	0.00	36,432.00	36,432.00
				Integration Team	Engineer	7/15/2026	8/14/2026	0.00	4,840.00	4,840.00
				McKay, Erin	Architect	7/15/2026	8/14/2026	0.00	10,120.00	10,120.00

Investment Baseline vs. Plan by Task



Investment Baseline vs. Plan by Task

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Investment OBS
All
Start Date
2/1/2026 1/31/2027

Investment Type
All
Unit Type
Hours

Investment Manager
All
Resource Manager
All
Include Inactive Investments?
Active

Investment
All
Resource
All
Include Inactive Resources?
Active

Investment Name	2/1/2026	3/1/2026	4/1/2026	5/1/2026	6/1/2026	7/1/2026	8/1/2026	9/1/2026	10/1/2026	11/1/2026	12/1/2026	1/1/2027	Total
**ABLE Payments Digital Experience													
Baseline							0.00	0.00	0.00	0.00	0.00	0.00	0.00
Actuals							0.00	0.00	0.00	0.00	0.00	0.00	0.00
ETC Hours							40.00	440.00	440.00	420.00	460.00	20.00	1,820.00
EAC Hours							40.00	440.00	440.00	420.00	460.00	20.00	1,820.00
Variance							40.00	440.00	440.00	420.00	460.00	20.00	1,820.00
**ABLE Payments Digital Experience													
Business Analyst													
Baseline							0.00	0.00	0.00	0.00	0.00	0.00	0.00
Actuals							0.00	0.00	0.00	0.00	0.00	0.00	0.00
ETC Hours							8.00	88.00	88.00	84.00	92.00	4.00	364.00
EAC Hours							8.00	88.00	88.00	84.00	92.00	4.00	364.00
Variance							8.00	88.00	88.00	84.00	92.00	4.00	364.00
Gupta, Rakesh													
Baseline							0.00	0.00	0.00	0.00	0.00	0.00	0.00
Actuals							0.00	0.00	0.00	0.00	0.00	0.00	0.00
ETC Hours							16.00	176.00	176.00	168.00	184.00	8.00	728.00
EAC Hours							16.00	176.00	176.00	168.00	184.00	8.00	728.00
Variance							16.00	176.00	176.00	168.00	184.00	8.00	728.00
Sampson, Mike													
Baseline							0.00	0.00	0.00	0.00	0.00	0.00	0.00
Actuals							0.00	0.00	0.00	0.00	0.00	0.00	0.00
ETC Hours							16.00	176.00	176.00	168.00	184.00	8.00	728.00
EAC Hours							16.00	176.00	176.00	168.00	184.00	8.00	728.00
Variance							16.00	176.00	176.00	168.00	184.00	8.00	728.00
ABLE Payments													
Baseline	100.90	110.99	286.99	273.94	286.99	269.41	168.00	176.00	176.00	150.81	0.00		2,000.03
Actuals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		0.00
ETC Hours	344.69	379.16	379.16	361.92	367.45	349.78	231.81	242.85	242.85	226.92	5.79		3,132.38
EAC Hours	344.69	379.16	379.16	361.92	367.45	349.78	231.81	242.85	242.85	226.92	5.79		3,132.38
Variance	243.79	268.17	92.17	87.98	80.47	80.37	63.81	66.85	66.85	76.11	5.79		1,132.35
New Task													
Project Manager													
Baseline	646.24	728.04	1,389.07	1,204.35	1,394.53	1,422.51	1,918.52	2,216.06	1,453.91	1,052.16	967.88	584.96	14,978.25
Actuals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
ETC Hours	16,089.03	15,039.96	14,929.09	10,528.04	6,927.13	9,578.50	9,428.44	9,780.85	7,888.77	5,407.58	4,947.67	1,501.79	112,046.83
EAC Hours	16,089.03	15,039.96	14,929.09	10,528.04	6,927.13	9,578.50	9,428.44	9,780.85	7,888.77	5,407.58	4,947.67	1,501.79	112,046.83
Variance	15,442.78	14,311.91	13,540.02	9,323.68	5,532.60	8,155.98	7,509.92	7,564.79	6,434.86	4,355.42	3,979.79	916.83	97,068.58

Investment Change Request Register



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Investment Change Request Register

Investment OBS	Investment Type	Investment Manager	Investment		
All	All	All	All		
Work Status	Investment Status	Investment Active	Is Program?	Change Request Priority	Change Request Status
All	All	Active	No	All	All

Investment Name	Investment ID	Owner	Change Request ID	Change Request Name	Created Date	Description
ABLE Payments Digital Experience	ID1020	Werner, Bob	CH00000014	Enhanced Security Features	13 Nov 2024	Enhanced Security Features: Implementing security measures, including two-factor authentication and encryption, to ensure the safety of transactions.
Upgrade to DoD IL 4 compliance	PR2006	Arpel, Ian	CH00000001	Additional Funding required	01 Sep 2019	
eCommerce Portal	PR2007	Arpel, Ian	CH00000001	Additional Funding required	01 Sep 2019	
ABLE Payments 2/0	PR2009	Arpel, Ian	CH00000001	Additional Funding required	01 Sep 2019	
GDPR Compliance - Loan Applications	PR2010	Arpel, Ian	CH00000001	Additional Funding required	01 Sep 2019	
Relocate Infrastructure to Las Vegas Data Center	PR2011	Arpel, Ian	CH00000001	Additional Funding required	01 Sep 2019	
Financial Process Audit	PR2012	Arpel, Ian	CH00000001	Additional Funding required	01 Sep 2019	
Migrate *MSP Services to SaaS	PR2013	Arpel, Ian	CH00000001	Additional Funding required	01 Sep 2019	
eBusiness Mobile Network	PR2014	Arpel, Ian	CH00000001	Additional Funding required	01 Sep 2019	
EMEA GDPR Certifications	PR2015	Arpel, Ian	CH00000001	Additional Funding required	01 Sep 2019	
Migrate AARD from New York Data Center	PR2017	Arpel, Ian	CH00000015	Something needs to happen	18 Nov 2024	
Executive Business Insights	PR2022	Arpel, Ian	CH00000001	Additional Funding required	12 Dec 2019	
Analytics and ERP Implementation	PR2092	Hensel, Ross	CH00000037	Additional funding for second BU	04 Aug 2025	
Email archival repository	PR2098	Arpel, Ian	CH00000001	Additional Funding required	16 Apr 2024	
Application for Tracking Implementations Project	PR2099	Arpel, Ian	CH00000001	Additional Funding required	27 Jan 2025	
Application for Tracking Implementations Project	PR2099	Arpel, Ian	CH00000018	We cant find Staff	27 Jan 2025	
Enterprise Applications	PR2103	Arpel, Ian	CH00000001	Additional Funding required	02 Apr 2025	
Exterior Review Project	PR2152	Arpel, Ian	CH00000001	Additional Funding required	16 Apr 2025	
Launch OD Version 14 Project	PR2153	Arpel, Ian	CH00000001	Additional Funding required	24 Apr 2025	
Foliage Review	PR2165	Arpel, Ian	CH00000001	Additional Funding required	10 Jun 2025	
**Electric Upgrade	PR2169	Arpel, Ian	CH00000001	Additional Funding required	14 Jul 2025	
New SFDC Upgrade Project	PR2170	Arpel, Ian	CH00000001	Additional Funding required	15 Jul 2025	
HR System Upgrade Version 2	PR2171	Arpel, Ian	CH00000001	Additional Funding required	21 Jul 2025	
Project Orion	PR2172	Arpel, Ian	CH00000001	Additional Funding required	21 Jul 2025	
Integration for data	PR2173	Arpel, Ian	CH00000001	Additional Funding required	22 Jul 2025	
Client- Professional Service	PR2175	Werner, Bob	CH00000042	CR-Major – UserAuth – Enforce 2FA on Login – CR-20250815-000	14 Aug 2025	

Investment Issue Register



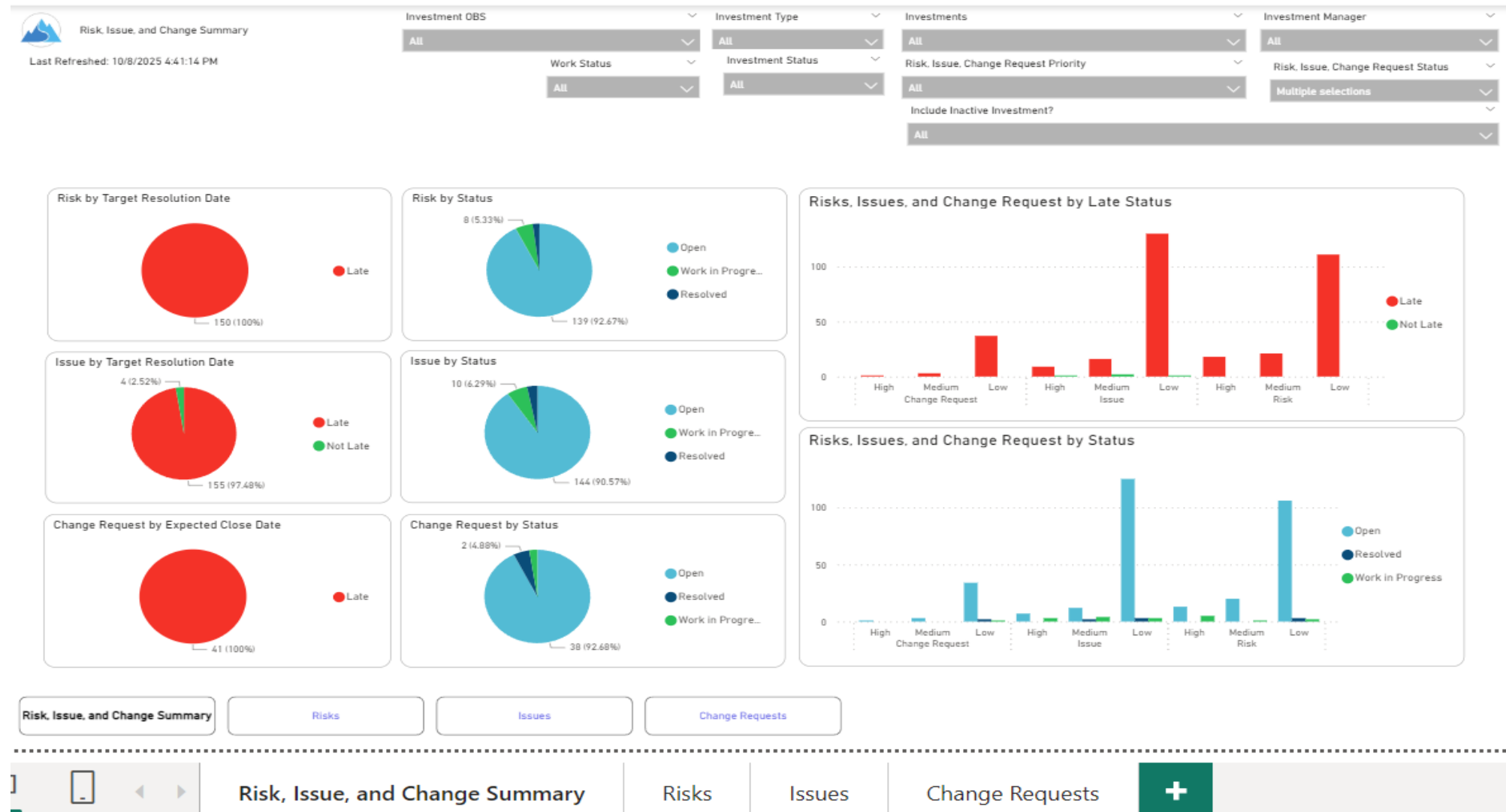
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Investment Issue Register

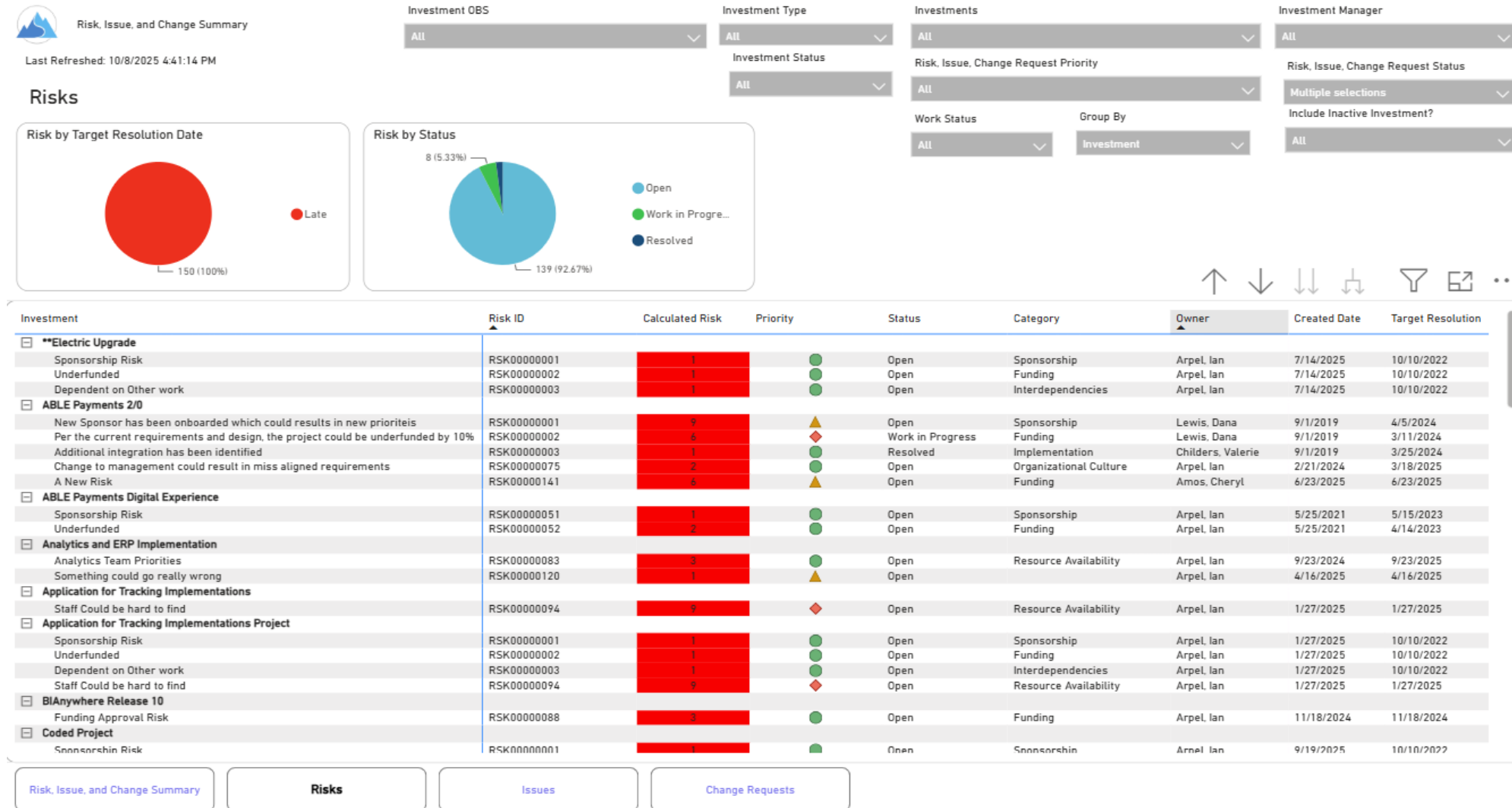
Investment OBS		Investment Type		Investment Manager		Investment	
All		All		All		All	
Work Status	Investment Status	Investment Active	Is Program?	Issue Priority	Issue Status		
All	All	Active	No	All	All		

Investment ID	Investment Name	Issue ID	Issue Name	Issue Created Date	Description	Owner	Target Resolution Date	Impact Date
PR2216	New Data Center	IS00000001	Critical resource is unavailable	15 Dec 2025		Arpel, Ian	07 Oct 2022	14 Oct 2022
PR2216	New Data Center	IS00000002	Integration with secure payment gateways for better payment processing	15 Dec 2025		Arpel, Ian	07 Oct 2022	14 Oct 2022
PR2216	New Data Center	IS00000003	Requirements are unclear	15 Dec 2025		Arpel, Ian	07 Oct 2022	14 Oct 2022
PR2216	New Data Center	IS00000004	System Architecture is non-compliant	15 Dec 2025		Arpel, Ian	07 Oct 2022	14 Oct 2022
PR2212	Integrated Logistics Platform	IS00000001	Critical resource is unavailable	03 Dec 2025		Arpel, Ian	18 Jun 2026	18 Jun 2026
PR2212	Integrated Logistics Platform	IS00000002	Integration with secure payment gateways for better payment processing	03 Dec 2025		Arpel, Ian	18 Jun 2026	18 Jun 2026
PR2212	Integrated Logistics Platform	IS00000003	Requirements are unclear	03 Dec 2025		Arpel, Ian	18 Jun 2026	18 Jun 2026
PR2212	Integrated Logistics Platform	IS00000004	System Architecture is non-compliant	03 Dec 2025		Arpel, Ian	18 Jun 2026	18 Jun 2026
PR2205	SecureShare File Vault Project	IS00000001	Critical resource is unavailable	02 Dec 2025		Arpel, Ian	07 Oct 2022	14 Oct 2022
PR2205	SecureShare File Vault Project	IS00000002	Integration with secure payment gateways for better payment processing	02 Dec 2025		Arpel, Ian	07 Oct 2022	14 Oct 2022
PR2205	SecureShare File Vault Project	IS00000003	Requirements are unclear	02 Dec 2025		Arpel, Ian	07 Oct 2022	14 Oct 2022
PR2205	SecureShare File Vault Project	IS00000004	System Architecture is non-compliant	02 Dec 2025		Arpel, Ian	07 Oct 2022	14 Oct 2022
PR2195	EP1 - Data Quality Rule Engine Enhancement	IS00000045	AWS Contract	14 Oct 2025		Parker, Ashley	18 May 2025	25 Aug 2025
PR2195	EP1 - Data Quality Rule	IS00000046	Funding Issues	14 Oct 2025		Lefevre, Christophe	28 May 2025	25 Aug 2025

Investment Risk, Issue, and Change Summary



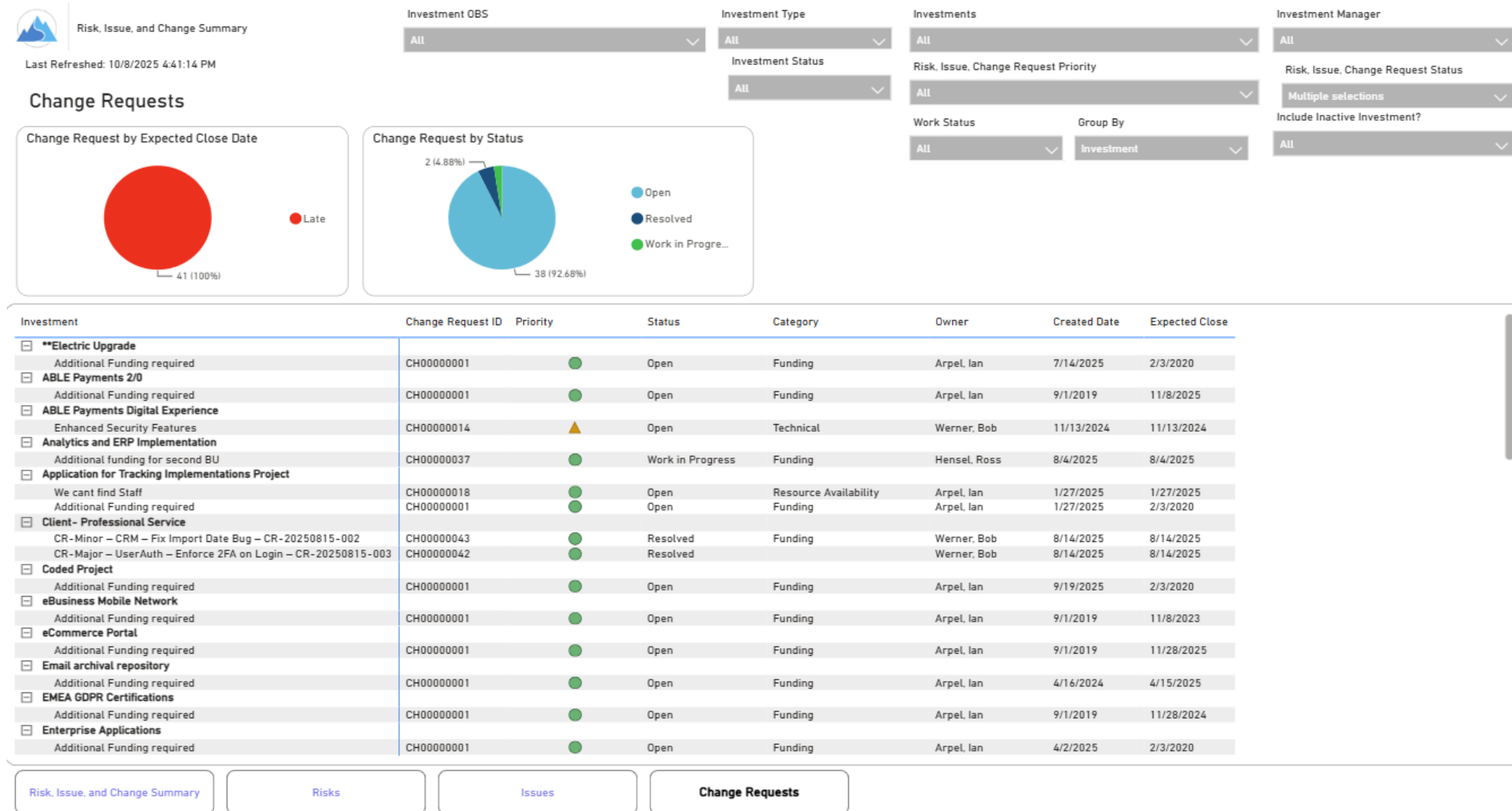
Investment Risk, Issue, and Change Summary (Cont.)



Investment Risk, Issue, and Change Summary (Cont.)



Investment Risk, Issue, and Change Summary (Cont.)



Resource Management



Capacity vs. Demand by Resource



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Capacity vs Demand by Resource

Resource OBS Type All	Resource OBS Unit All	Resource Manager All	Booking Manager All	Resource Role All
Resource All	Employment Type All	Resource Status Active	Booking Status All	Investment Status All
Investment OBS Type All	Investment OBS Unit All	Period Type Monthly Weekly		Type Of Hours Allocation Assignment
		Unit Type FTE Hours		

Resource Capacity vs Allocation (Hours, Monthly)													
Resource	Metric	Investment	01-Oct-2025	01-Nov-2025	01-Dec-2025	01-Jan-2026	01-Feb-2026	01-Mar-2026	01-Apr-2026	01-May-2026	01-Jun-2026	01-Jul-2026	Total
Admin, PMO	Capacity		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	1,744.00
	Demand		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Remaining Capacity		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	1,744.00
Administrator, Moventus	Capacity		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	1,744.00
	Demand		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Remaining Capacity		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	1,744.00
Amos, Cheryl	Capacity		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	1,744.00
	Demand		561.20	392.00	377.20	360.80	328.00	360.80	360.80	344.40	360.80	377.20	3,823.20
	Investment	Blackhawks Team	46.00	40.00	46.00	44.00	40.00	44.00	44.00	42.00	44.00	46.00	436.00
		Client- Professional Service	55.20	48.00	55.20	52.80	48.00	52.80	52.80	50.40	52.80	55.20	523.20
		Exterior Review Project	184.00	64.00									248.00
		Mobile Team	92.00	80.00	92.00	88.00	80.00	88.00	88.00	84.00	88.00	92.00	872.00
		Program Example	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	1,744.00
	Remaining Capacity		-377.20	-232.00	-193.20	-184.80	-168.00	-184.80	-184.80	-176.40	-184.80	-193.20	-2,079.20
Andersson, Peter	Capacity		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	1,744.00
	Demand		368.00	320.00	368.00	352.00	320.00	352.00	352.00	336.00	352.00	368.00	3,488.00
	Investment	Blackhawks Team	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	1,744.00
		Client- Professional	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	1,744.00

Over / Under Allocation by Resource



You are viewing 133 resource(s)
Last Refreshed: 10-27-2025 16:22

Over/Under Allocation by Resource

Resource OBS All **Resource Manager** All **Booking Manager** All **Resource Role** All **Resource** All **Resource Status** Active
Booking Status All **Employment Type** All **Investment OBS** All **Investment Active** All **Investment Status** All **Type Of Hours** Allocation
Period Type Monthly **Unit Type** Hours **Over/Under Allocation** Over and Under Allocation **Group By** Resource Manager **Allocation Threshold %** -10 10 **Date Range** 10/1/2025 8/31/2026

Resource Manager	Resource Name	Primary Role	01-Oct-2025	01-Nov-2025	01-Dec-2025	01-Jan-2026	01-Feb-2026	01-Mar-2026	01-Apr-2026	01-May-2026	01-Jun-2026	01-Jul-2026	01-Aug-2026
	Administrator, Moventus	Manager	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Fowler, Ray		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Greer, Eliza		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	lape, crystal		-56.00	-120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Tiago, Abreu		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	z_xog, xog		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
Arpel, Ian	Barry, Debra	Product Manager	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Calderon, Mindy		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Conway, Jack	Scientist	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Cooper, Amanda		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Grant, Lily	Project Manager	32.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Hensel, Ross	Architect	165.60	144.00	165.60	158.40	144.00	158.40	158.40	151.20	158.40	165.60	151.20
	Joseph, Derrick	Manager	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Katsarov, Nikolay		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Miller, Rosie	Manager	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	odata, user		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Oliva, Vince	Architect	184.00	160.00	184.00	123.20	112.00	123.20	147.20	168.00	176.00	184.00	168.00
	Raper, Ben		184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Surmann, Hayley		-68.00	80.00	92.00	88.00	80.00	88.00	88.00	164.00	176.00	184.00	168.00
	Toplicar, Brian	Engineer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Werner, Bob	Business Analyst	0.00	24.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
Donegal, Amy	Admin, PMO	Solutions Marketing	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00
	Chapin, Tom	Solutions Marketing	184.00	160.00	184.00	176.00	160.00	176.00	176.00	168.00	176.00	184.00	168.00

Over / Under Allocation by Resource (Cont.)



You are viewing 1 resource(s)
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Capacity vs Demand by Resource



Resource OBS

Resource Manager

Booking Manager

Resource Role

Resource

Resource Status

All

All

All

All

All

Active

Booking Status

Employment Type

Investment OBS Unit

Investment Active

Investment Status

Type Of Hours

All

All

All

Active

All

Allocation

Period Type

Unit Type

Date Range

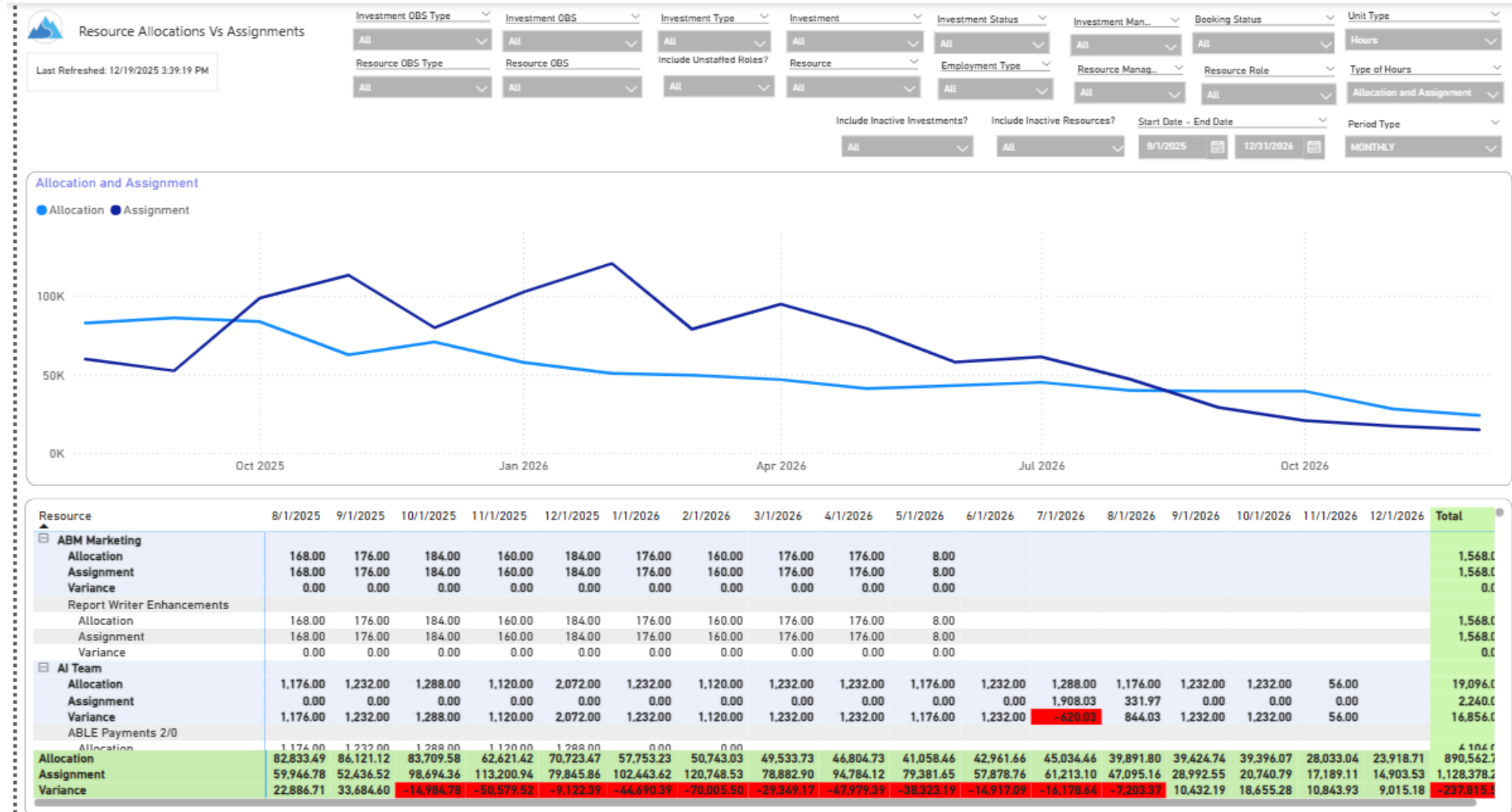
Monthly

Hours

10/1/2025

7/31/2026

Resource Allocations and Assignments



Capacity vs. Demand by Role



Capacity vs. Demand by Role

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Resource OBS

All

Employment Type

All

Start Date

9/28/2025

9/1/2028

Include Roles With No Capacity?

Yes

Resource Manager

All

Booking Status

All

Period Type

Weekly

Include Unstaffed Resources?

Yes

Booking Manager

All

Investment OBS

All

Unit Type

Hours

Include Inactive Resources?

Active

Resource Role

All

Investment Status

All

Type of Hours

Allocated

Include Inactive Investments?

Active

Resource Name	9/29/2025	10/6/2025	10/13/2025	10/20/2025	10/27/2025	11/3/2025	11/10/2025	11/17/2025	11/24/2025	12/1/2025	12/8/2025	12/15/2025	12/22/2025	12/29/2025	1/5/2026	1/12/2026	1/19/2026	1/26/2026	2/2/2026	2/9/2026
ABM Marketing																				
Capacity	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
Demand	128.37	128.37	128.37	128.37	128.37	128.37	128.37	128.37	128.37	88.37	88.37	88.37	88.37	88.37	88.37	88.37	88.37	88.37	88.37	88.37
Remaining Capacity	-88.37	-88.37	-88.37	-88.37	-88.37	-88.37	-88.37	-88.37	-88.37	-48.37	-48.37	-48.37	-48.37	-48.37	-48.37	-48.37	-48.37	-48.37	-48.37	-48.37
Analyst Relations																				
Capacity	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
Demand	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
Remaining Capacity	-40.00	-40.00	-40.00	-40.00	-40.00	-40.00	-40.00	-40.00	-40.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Architect																				
Capacity	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00
Demand	1,288.41	1,213.62	1,210.96	1,210.96	1,037.87	953.31	937.31	849.31	793.31	782.02	766.02	766.02	702.02	661.76	665.38	665.38	665.38	665.38	665.38	644.01
Remaining Capacity	-888.41	-813.62	-810.96	-810.96	-637.87	-553.31	-537.31	-449.31	-393.31	-382.02	-366.02	-366.02	-302.02	-261.76	-265.38	-265.38	-265.38	-265.38	-265.38	-244.01
Business Analyst																				
Capacity	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00
Demand	1,104.00	1,016.00	1,008.00	1,008.00	856.00	688.00	672.00	616.00	544.00	528.00	528.00	528.00	480.00	432.00	448.00	448.00	448.00	448.00	448.00	448.00
Remaining Capacity	-824.00	-736.00	-728.00	-728.00	-576.00	-408.00	-392.00	-336.00	-264.00	-248.00	-248.00	-248.00	-200.00	-152.00	-168.00	-168.00	-168.00	-168.00	-168.00	-168.00
Corporate Marketing																				
Capacity	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
Demand	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
Remaining Capacity	-40.00	-40.00	-40.00	-40.00	-40.00	-40.00	-40.00	-40.00	-40.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Data Analytics Engineer																				
Capacity																				
Demand	110.00	110.00	110.00	110.00	110.00	110.00	110.00	110.00	110.00	110.00	110.00	110.00	70.00	70.00	70.00	70.00	70.00	70.00	70.00	70.00
Remaining Capacity	-110.00	-110.00	-110.00	-110.00	-110.00	-110.00	-110.00	-110.00	-110.00	-110.00	-110.00	-110.00	-70.00	-70.00	-70.00	-70.00	-70.00	-70.00	-70.00	-70.00
Engineer																				
Capacity	1,980.00	1,980.00	1,980.00	1,980.00	1,980.00	1,980.00	1,980.00	1,980.00	1,980.00	1,980.00	1,980.00	1,980.00	1,980.00	1,848.58	1,780.00	1,780.00	1,780.00	1,780.00	1,780.00	1,780.00
Demand	3,702.82	3,455.42	3,399.42	3,399.42	3,223.42	3,157.46	3,141.46	3,053.46	2,997.46	3,152.46	3,152.46	3,152.46	3,088.46	2,815.90	2,662.46	2,662.46	2,662.46	2,662.46	2,622.46	2,622.46
Remaining Capacity	-1,722.82	-1,475.42	-1,419.42	-1,419.42	-1,243.42	-1,177.46	-1,161.46	-1,073.46	-1,017.46	-1,172.46	-1,172.46	-1,172.46	-1,108.46	-967.32	-882.46	-882.46	-882.46	-882.46	-842.46	-842.46
Manager																				
Capacity	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00
Demand	80.00	80.00	80.00	80.00	2.00															
Remaining Capacity	120.00	120.00	120.00	120.00	198.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00
ML Engineer																				
Capacity	4,920.00	4,920.00	4,920.00	4,920.00	4,920.00	4,920.00	4,920.00	4,920.00	4,920.00	4,920.00	4,920.00	4,920.00	4,920.00	4,788.58	4,720.00	4,720.00	4,720.00	4,720.00	4,720.00	4,720.00
Demand	11,623.11	10,780.64	10,678.77	10,678.77	9,597.26	8,803.32	8,691.32	8,107.32	7,699.32	7,637.04	7,621.04	7,621.04	7,281.04	6,606.67	6,270.39	6,270.39	6,230.39	6,230.39	6,230.39	6,089.02
Remaining Capacity	-6,703.11	-5,860.64	-5,758.77	-5,758.77	-4,677.26	-3,883.32	-3,771.32	-3,187.32	-2,779.32	-2,717.04	-2,701.04	-2,701.04	-2,361.04	-1,818.09	-1,550.39	-1,550.39	-1,510.39	-1,510.39	-1,510.39	-1,369.02

Capacity vs. Booking Status by OBS

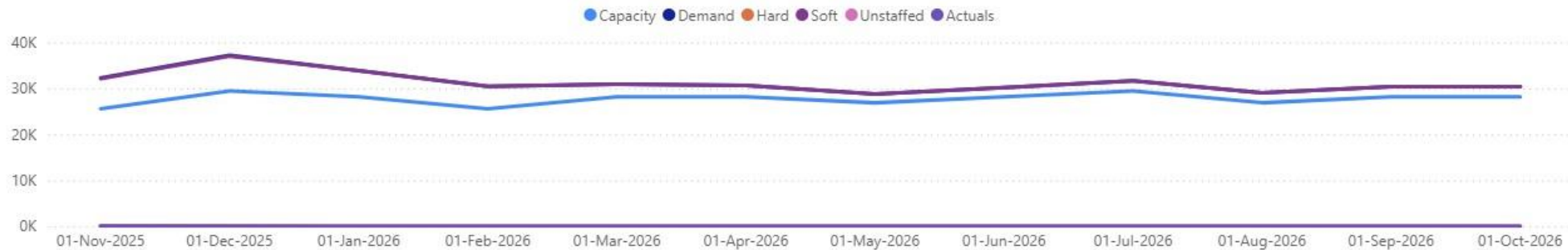


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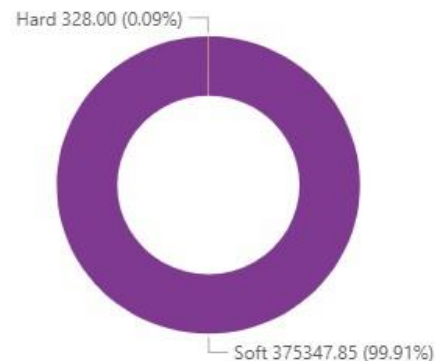
Capacity vs Booking Status by Resource OBS

Resource OBS	Employment Type	Resource Manager	Booking Manager	Resource Role	Resource Active	Resource
Corporate Department OB...	All	All	All	All	Active	All
Booking Status	Investment Active	Investment Status	Investment OBS	Period Type	Unit Type	Date Range
All	Active	All	All	Monthly	Hours	01-11-2025 31-10-2026

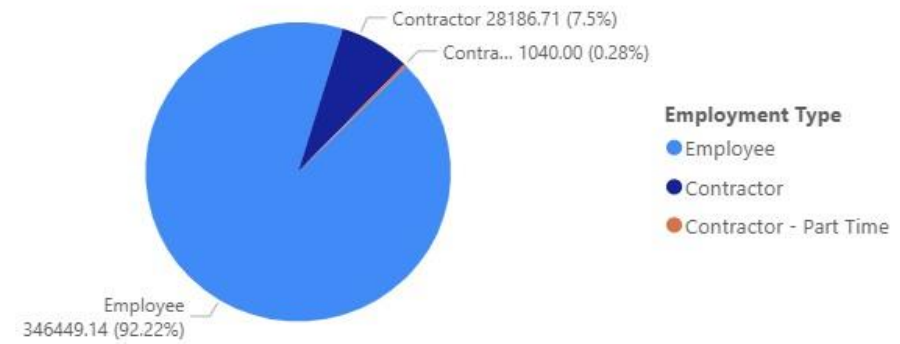
Capacity vs Booking Status



Demand by Booking Status



Demand by Employment Type



Resource Assignments by Task

← **Resource Assignments by Task**

Resource OBS Type: All
 Resource OBS Path: All
 Resource Manager(s): All
 Booking Manager(s): All
 Booking Status: All
 Project(s): All
 Project Manager(s): All
 Employment Time: All
 Role(s): All
 Project Status: All
 Project Type: All
 Task Status: All
 Task Start Date: 6/2/2019 - 11/2/2027
 Resource Is Active?: All
 Projects Is Active?: All
 WBS Type: All
 Include Completed Task?: All
 Unstaffed Role?: All

Project	Project Status	Project Manager	Task	Task Status	% Complete	Resource	Role	Start Date	Finish Date	Actuals	ETC	EAC
**ABLE Payments Digital Experience	Submitted for Approval	Amos, Cheryl	**ABLE Payments Digital Experience	Not Started	0.00	Sampson, Mike	QA	8/28/2026	1/1/2027	0.00	728.00	728.00
						Gupta, Rakesh	Engineer	8/28/2026	1/1/2027	0.00	728.00	728.00
						Business Analyst	Business Analyst	8/28/2026	1/1/2027	0.00	364.00	364.00
						Blackhawks Team		8/28/2026	1/1/2027	0.00	0.00	0.00
ABLE Payments	Approved	Lewis, Dana	A NEW TASK!!!	Started	1.00	Amos, Cheryl	Engineer	2/28/2025	2/28/2025	0.00	0.00	0.00
			Complete Project Plan	Started	0.00	Quinn, Randy	Business Analyst	2/6/2024	2/9/2024	40.00	0.00	40.00
						Lewis, Dana	Engineer	2/6/2024	5/30/2025	62.00	0.00	62.00
						Granger, Paula	Project Manager	3/24/2025	3/28/2025	40.00	0.00	40.00
			Database Development	Started	0.00	Server Equipment	Equipment	2/9/2024	2/9/2024	1.00	0.00	1.00
						Newburg, Mary	Engineer	3/24/2025	3/28/2025	40.00	0.00	40.00
						Granger, Paula	Project Manager	2/9/2024	3/1/2024	0.00	0.00	0.00
						Berry, Jason	Engineer	2/9/2024	3/1/2024	80.00	0.00	80.00
			Define Scope Change and Control Process	Completed	100.00	Lewis, Dana	Engineer	1/26/2024	2/6/2024	40.00	0.00	40.00
			Functional and System Testing	Started	0.00	Stoneburg, Sam	QA	3/5/2024	12/5/2025	345.00	0.00	345.00
						QA		12/8/2025	11/26/2026	0.00	2,803.81	2,803.81
						Lewis, Dana	Engineer	5/26/2025	5/30/2025	18.00	0.00	18.00
						Garcia, Alex	ML Engineer	3/5/2024	7/23/2026	174.00	1,693.09	1,867.09
						Fleming, Nicole	ML Engineer	2/10/2025	3/28/2025	120.00	0.00	120.00
			Functional and Technical Design	Completed	100.00	Berry, Jason	Engineer	2/10/2025	12/10/2025	245.00	0.00	245.00
						Security Architect	Security Architect	2/5/2024	2/16/2024	0.00	0.00	0.00

Resource Availability


Resource Availability

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Resource OBS
 All
 Resource
 All

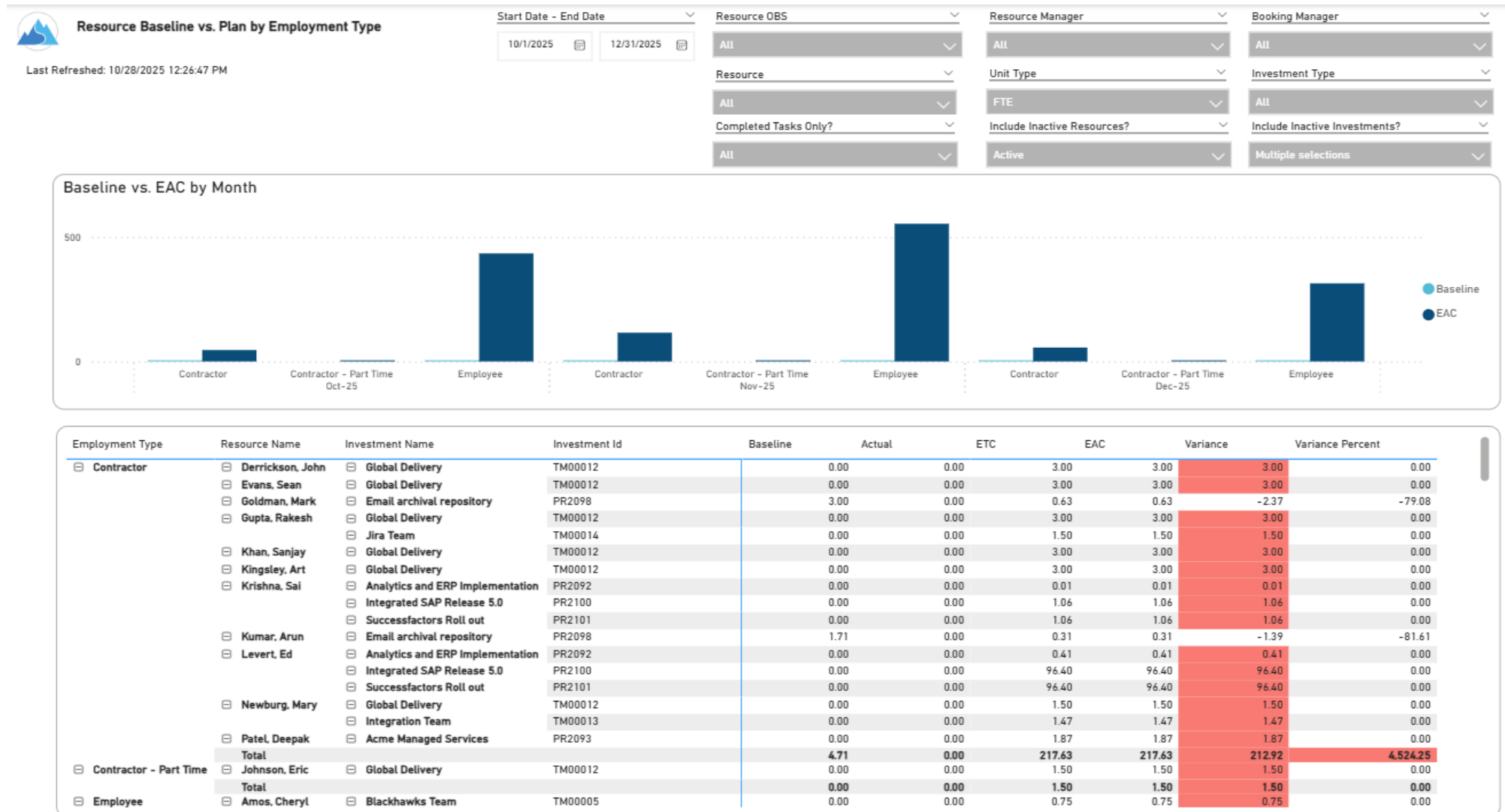
Resource Manager
 All
 Employment Type
 All
 Start Date
 10/1/2025 10/1/2026

Booking Manager
 All
 Period Type
 Weekly
 Group By
 Primary Role Name

Resource Role
 All
 Unit Type
 Hours
 Include Inactive Resources?
 Active

Primary Role Name	Resource Name	Resource Manager	9/29/2025	10/6/2025	10/13/2025	10/20/2025	10/27/2025	11/3/2025	11/10/2025	11/17/2025	11/24/2025	12/1/2025	12/8/2025	12/15/2025	12/22/2025	12/29/2025	1/5/2026	1/12/2026
ABM Marketing	Lang, Suzie	Donegal, Amy	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Total		40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
Analyst Relations	Donegal, Amy	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Total		40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
Architect	Childers, Valerie	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Coleman, Joyce	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Dixon, Danielle	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Hayes, Justin	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Hensel, Ross	Arpel, Ian	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	McKay, Erin	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Morris, Tom	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Oliva, Vince	Arpel, Ian	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Ramos, Adriana	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Werner, Robbie	Werner, Bob	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Total		400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00
Business Analyst	Arpel, Ian	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Hill, Wayne	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Hudson, Barb	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Quinn, Randy	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Sauer, Jason	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Stewart, Diane	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Werner, Bob	Arpel, Ian	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Total		280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00	280.00
Corporate Marketing	Reed, Henry	Donegal, Amy	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Total		40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
Engineer	Amos, Cheryl	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Andersson, Peter	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Awad, Rashid	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Berry, Jason	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Bhatt, Rakesh	Fowler, Ray	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Chen, Chih-wei	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Clarke, Stanley	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Derrickson, John	Kumar, Arun	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Evans, Sean	Kumar, Arun	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
	Garcia, Noa	Miller, Rosie	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00

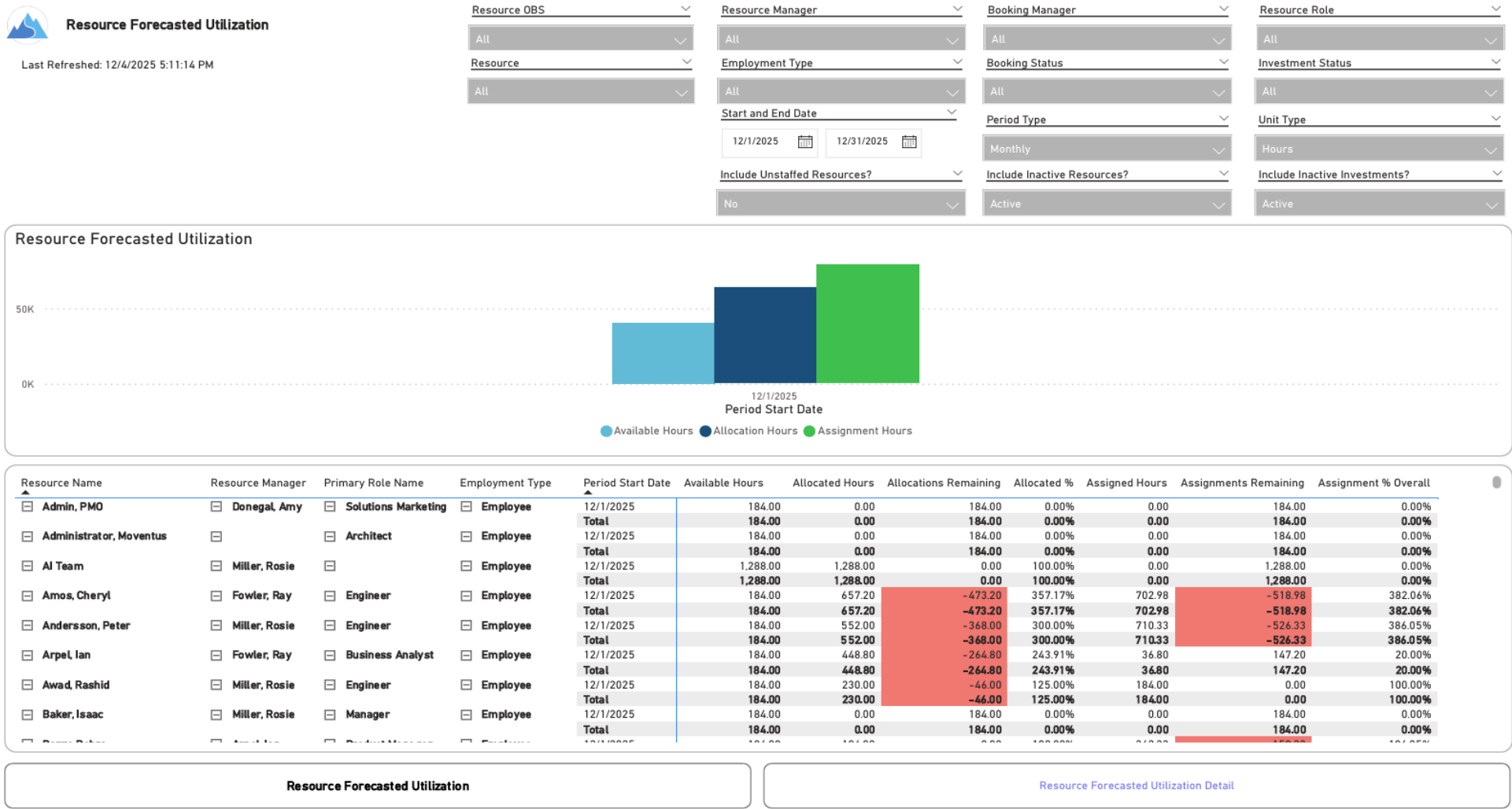
Resource Baseline vs. Plan by Employment Type



Resource Forecasted Utilization Detail

Resource Forecasted Utilization Detail						
Last Refreshed: 11/9/2025 2:00:26 PM						
Resource OBS		Resource Manager		Booking Manager		Resource Role
All		All		All		All
Resource		Employment Type		Booking Status		Investment Status
All		All		All		All
Start and End Date		Period Type		Unit Type		Investment or Task Level?
11/1/2025 11/30/2025		Monthly		Hours		Task Name
		Include Unstaffed Resources?		Include Inactive Resources?		Include Inactive Investments?
		No		Active		Active
Resource Name	Charge Code	Available	Allocated Hours	Allocated %	Assigned Hours	Assignment %
Admin, PMO						
11/1/2025		160.00				
Administrator, Moventus						
11/1/2025		160.00				
AI Team						
11/1/2025		1,120.00	1,120.00	100.00%		
ABLE Payments 2/0	Management		1,120.00	100.00%		
Amos, Cheryl						
11/1/2025		160.00	552.00	345.00%	205.33	128.33%
ABLE Payments 2/0	Management		160.00	100.00%		
Blackhawks Team			40.00	25.00%	40.00	25.00%
Blackhawks Team					40.00	25.00%
Client- Professional Service			48.00	30.00%	48.00	30.00%
Initial Task	M1				48.00	30.00%
Exterior Review Project	Management		64.00	40.00%	37.33	23.33%
Complete Project Plan					37.33	23.33%
Mobile Team			80.00	50.00%	80.00	50.00%
Mobile Team					80.00	50.00%
Program Example	Management		160.00	100.00%		
Andersson, Peter						
11/1/2025		160.00	480.00	300.00%	646.67	404.17%
Blackhawks Team			160.00	100.00%	160.00	100.00%
Blackhawks Team					160.00	100.00%
Client- Professional Service			160.00	100.00%	326.67	204.17%
Initial Task	M1				160.00	100.00%
Task 4	M3				166.67	104.17%
Jaguars Team			160.00	100.00%	160.00	100.00%
Jaguars Team					160.00	100.00%
Arpel, Ian						
11/1/2025		160.00	432.00	270.00%	32.00	20.00%
ABLE Payments 2/0	Management		160.00	100.00%		
Analytics and ERP Implementation	Management		80.00	50.00%		
Total						

Resource Forecasted Utilization



Resource Forecasted Utilization (Cont.)

**Resource Forecasted Utilization**

Last Refreshed: 12/4/2025 5:11:14 PM

Resource OBS

All

Resource

All

Start and End Date

12/1/202512/31/2025

Resource Manager

All

Employment Type

All

Period Type

Monthly

Include Unstaffed Resources?

No

Booking Manager

All

Booking Status

All

Unit Type

Hours

Include Inactive Resources?

Active

Resource Role

All

Investment Status

All

Investment or Task Level?

Task Name

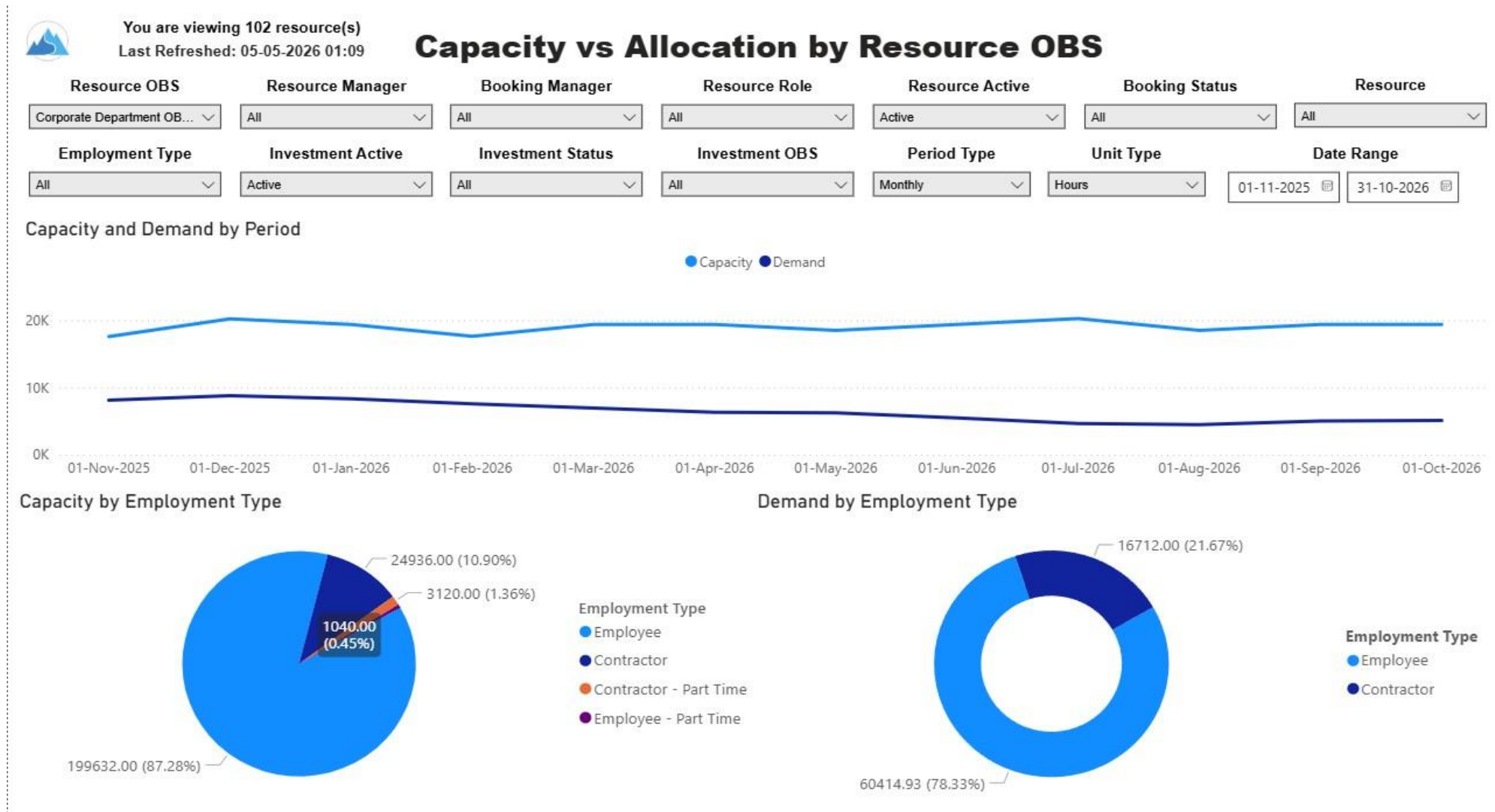
Include Inactive Investments?

Active

Resource Forecasted Utilization

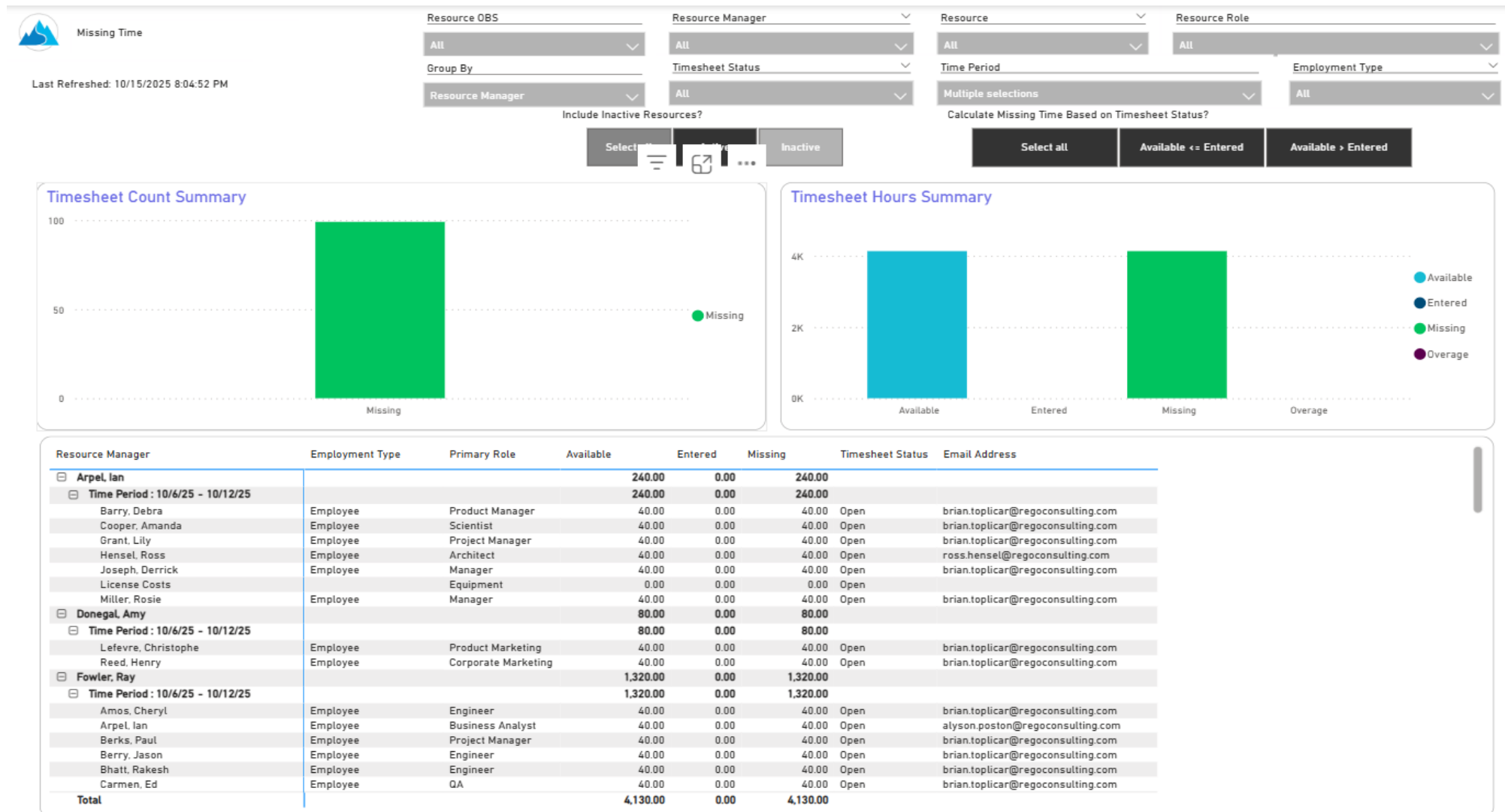
Resource Forecasted Utilization Detail

Capacity vs. Allocation by OBS



Time Management

Missing Time



Resource Time Review by Manager



Resource Time Review by Manager

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10/24/2025 2:03:01 PM

Resource OBS

All

Group By

Resource Manager

Investment Type

All

Resource

All

Employment Type

All

Resource Manager

All

Timesheet Status

All

Investment Manager

All

Include Inactive Resources?

All

Resource Role

All

Time Period

All

Investment

All

Include Inactive Investments?

All

First Day of Work Week

Default (Monday)

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Resource Manager	Timesheet Status	Type	Investment Name	Task Status	Input Type	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
☒ Arpel, Ian						42.80	43.80	42.80	43.30	44.30			217.00
☒ Barry, Debra						40.80	40.80	40.80	40.80	40.80			204.00
☒ 5/4/2025						8.80	8.80	8.80	8.80	8.80			44.00
Iterative Design	Posted	Task	DPM Loan App Rel 5.0	Started	Billable	4.40	4.40	4.40	4.40	4.40			22.00
PSA Managed Services	Posted	Task	Acme Managed Services	Started	Billable	4.40	4.40	4.40	4.40	4.40			22.00
☒ 7/13/2025						8.00	8.00	8.00	8.00	8.00			40.00
Initial Task	Posted	Task	Client - Professional Service	Started	Billable	8.00	8.00	8.00	8.00	8.00			40.00
☒ 7/20/2025						8.00	8.00	8.00	8.00	8.00			40.00
Initial Task	Posted	Task	Client - Professional Service	Started	Billable	8.00	8.00	8.00	8.00	8.00			40.00
☒ 7/27/2025						8.00	8.00	8.00	8.00	8.00			40.00
Initial Task	Posted	Task	Client - Professional Service	Started	Billable	8.00	8.00	8.00	8.00	8.00			40.00
☒ 8/3/2025						8.00	8.00	8.00	8.00	8.00			40.00
Initial Task	Open	Task	Client - Professional Service	Started	Billable	8.00	8.00	8.00	8.00	8.00			40.00
☒ Hensel, Ross						2.00	3.00	2.00	2.50	3.50			13.00
☒ 7/27/2025						2.00	3.00	2.00	2.50	3.50			13.00
Functional and Technical Design	Open	Task	Analytics and ERP Implementation	Started		1.00	1.00	1.00	1.00	1.00			5.00
Implement new SSO	Open	Other Work	Implement new SSO	Not Started		1.00	1.00	1.00	0.50	0.50			4.00
Platform Testing	Open	Task	Analytics and ERP Implementation	Not Started			1.00		1.00	2.00			4.00
☒ Donegal, Amy						8.00	8.00	8.00	8.00	8.00			40.00
☒ Lefevre, Christophe						8.00	8.00	8.00	8.00	8.00			40.00
☒ 3/30/2025						8.00	8.00	8.00	8.00	8.00			40.00
Backorder fulfillment	Posted	Task	Minimal Online Shopping Release 4.0	Started	Billable	4.00	4.00	4.00	4.00	4.00			20.00
Post Implementation Transition	Posted	Task	DPM Loan App Rel 6.0	Started	Billable	4.00	4.00	4.00	4.00	4.00			20.00
☒ Fowler, Ray						801.36	755.86	732.86	797.86	838.86	12.00		3,938.80
☒ Amos, Cheryl						32.00	32.00	32.00	32.00	32.00			160.00
☒ 3/30/2025						8.00	8.00	8.00	8.00	8.00			40.00
Data Exchange Solution	Posted	Task	Payment API Work	Started	Billable	2.00	2.00	2.00	2.00	2.00			10.00
Ensure API's Public	Posted	Task	Payment API Work	Started	Billable	2.00	2.00	2.00	2.00	2.00			10.00
Iterative Planning	Posted	Task	DPM Loan App Rel 6.0	Started	Billable	4.00	4.00	4.00	4.00	4.00			20.00
Total						1,301.28	1,256.78	1,230.78	1,320.28	1,302.28	12.00		6,423.40

Resource Time Summary and Detail



Resource Time Summary and Detail

Last Refreshed: 1/2/2026 9:21:49 AM

Resource OBS
All

Resource
All

Resource Manager
All

Employment Type
All

Time Period
All

Group By
Resource Manager

Timesheet Status
All

Include Inactive Resources?
All

Resource Manager	Resource Name	Start Date	Finish Date	Timesheet Status	Adjustment	Sum of Time Hours	Notes by Category
Arpel, Ian	Barry, Debra	4/28/2025	5/4/2025	Posted		44.00	
		7/7/2025	7/13/2025	Posted		40.00	
		7/14/2025	7/20/2025	Posted		40.00	
		7/21/2025	7/27/2025	Posted		40.00	
		7/28/2025	8/3/2025	Open		40.00	
	Hensel, Ross	7/21/2025	7/27/2025	Open		43.00	
		9/29/2025	10/5/2025	Submitted		10.00	
		10/13/2025	10/19/2025	Posted		36.00	
		10/20/2025	10/26/2025	Returned		48.50	
						341.50	
	Total						
Fowler, Ray	Amos, Cheryl	7/7/2025	7/13/2025	Posted		40.00	
		7/14/2025	7/20/2025	Posted		40.00	
		7/21/2025	7/27/2025	Posted		40.00	
		10/27/2025	11/2/2025	Posted		50.00	
		11/3/2025	11/9/2025	Posted		50.00	
		11/10/2025	11/16/2025	Posted		50.00	
		11/17/2025	11/23/2025	Posted		45.00	
		11/24/2025	11/30/2025	Posted		45.00	
		12/1/2025	12/7/2025	Posted		45.00	
		4/21/2025	4/27/2025	Submitted		40.00	
		4/28/2025	5/4/2025	Submitted		40.00	
		6/2/2025	6/8/2025	Open		40.00	
	Arpel, Ian	6/9/2025	6/15/2025	Posted		41.00	
		6/30/2025	7/6/2025	Open		28.00	
		7/7/2025	7/13/2025	Open		49.00	
		8/4/2025	8/10/2025	Submitted		33.00	
		11/10/2025	11/16/2025	Submitted		20.00	
		4/7/2025	4/13/2025	Open		32.00	
		8/4/2025	8/10/2025	Open		4.00	
		6/2/2025	6/8/2025	Open		24.60	
		6/9/2025	6/15/2025	Open		24.60	
		6/16/2025	6/22/2025	Open		24.60	
		7/21/2025	7/27/2025	Open		20.00	
		11/3/2025	11/9/2025	Open		40.00	
	Parker, Ashley	6/9/2025	6/15/2025	Submitted		40.00	
		6/23/2025	6/29/2025	Posted		40.00	
		8/11/2025	8/17/2025	Open		18.85	
		5/26/2025	6/1/2025	Open		42.00	
	Riviera, Alex	7/7/2025	7/13/2025	Open		38.65	
		11/3/2025	11/9/2025	Open		20.00	
						1,065.30	
	Total						
Miller, Rosie	Garcia, Alex	8/11/2025	8/17/2025	Open		8.00	

Time Compliance



Time Compliance

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OBS Type

All

Resource Manager

All

Time Period

Select all

9/22/2025 | 9/28/2025 | Previous Period

9/29/2025 | 10/5/2025 | Current Period

10/6/2025 | 10/12/2025 | Next Period

1/7/2019 | 1/12/2019

1/14/2019 | 1/20/2019

1/21/2019 | 1/27/2019

1/28/2019 | 2/3/2019

2/4/2019 | 2/10/2019

Resource OBS Unit

People

Employment Type

All

Compliance % Yellow Threshold

90%

Include Inactive Resources?

Compliance % Red Threshold

10%

OBS Unit Name	Compliance %	Number of Timesheets	Open	Submitted	Returned	Approved	Posted
People	11,85%	135	119	0	0	0	16
BU Staff	28,57%	35	25	0	0	0	10
Contractors	6,67%	15	14	0	0	0	1
Engineering	10,00%	50	45	0	0	0	5
Management	0,00%	12	12	0	0	0	0
Marketing	0,00%	8	8	0	0	0	0
Scientists	0,00%	1	1	0	0	0	0
Teams	0,00%	10	10	0	0	0	0
Total	11,85%	135	119	0	0	0	16

Let Rego be your guide.

regoUniversity2026

Time Compliance Detail


Time Compliance Detail

Resource OBS
All

Resource Manager
All

Employment Type
All

Active/Inactive Resources
All

Time Period
☐ Select all
☒ 10/12/2025 | 10/18/2025 | Previous Period
☐ 10/19/2025 | 10/25/2025 | Current Period
☐ 10/26/2025 | 11/1/2025 | Next Period
☐ 1/6/2019 | 1/11/2019
☐ 1/13/2019 | 1/19/2019
☐ 1/20/2019 | 1/26/2019
☐ 1/27/2019 | 2/2/2019
☐ 2/3/2019 | 2/9/2019

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OBS Unit	Resource Name	Email Address	Period Ending	Status	Employment Type	Resource Manager
11111 - EJ	Hardware		2025-10-12	Open		Arpel, Ian
ABLE Business Unit	Barry, Debra	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Arpel, Ian
ABLE Business Unit	Clark, Patrick	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Fowler, Ray
ABLE Business Unit	Computer		2025-10-12	Open		Miller, Rosie
ABLE Business Unit	Fowler, Ray	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	
ABLE Business Unit	Grant, Lily	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Arpel, Ian
ABLE Business Unit	License		2025-10-12	Open		Miller, Rosie
ABLE Business Unit	Server Equipment		2025-10-12	Open		Miller, Rosie
ABLE Business Unit	Travel		2025-10-12	Open		Arpel, Ian
ABLE Business Unit	Werner, Robbie	bob.werner@regoconsulting.com	2025-10-12	Open	Employee	Werner, Bob
ABLE Business Unit BusOps	Arpel, Ian	alyson.poston@regoconsulting.com	2025-10-12	Open	Employee	Fowler, Ray
ABLE Business Unit BusOps	Baker, Isaac	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Miller, Rosie
ABLE Business Unit BusOps	Beasley, Frank	brian.toplicar@regoconsulting.com	2025-10-12	Open	Contractor - Part Time	Kumar, Arun
ABLE Business Unit BusOps	Berks, Paul	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Fowler, Ray
ABLE Business Unit BusOps	Berry, Jason	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Fowler, Ray
ABLE Business Unit BusOps	Bhatt, Rakesh	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Fowler, Ray
ABLE Business Unit BusOps	Carmen, Ed	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Fowler, Ray
ABLE Business Unit BusOps	Chasen, Nicole	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Fowler, Ray
ABLE Business Unit BusOps	Childers, Valerie	ross.hensel@gmail.com	2025-10-12	Open	Employee	Fowler, Ray
ABLE Business Unit BusOps	Coleman, Joyce	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Fowler, Ray
ABLE Business Unit BusOps	Cooper, Amanda	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Arpel, Ian
ABLE Business Unit BusOps	Cope, Michael	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee - Part Time	Fowler, Ray
ABLE Business Unit BusOps	Derrickson, John	brian.toplicar@regoconsulting.com	2025-10-12	Open	Contractor	Kumar, Arun
ABLE Business Unit BusOps	Dixon, Danielle	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Miller, Rosie
ABLE Business Unit BusOps	Evans, Sean	brian.toplicar@regoconsulting.com	2025-10-12	Open	Contractor	Kumar, Arun
ABLE Business Unit BusOps	Garcia, Alex	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Miller, Rosie
ABLE Business Unit BusOps	Goldman, Mark	brian.toplicar@regoconsulting.com	2025-10-12	Open	Contractor	Kumar, Arun
ABLE Business Unit BusOps	Granger, Paula	brian.toplicar@regoconsulting.com	2025-10-12	Open	Employee	Fowler, Ray

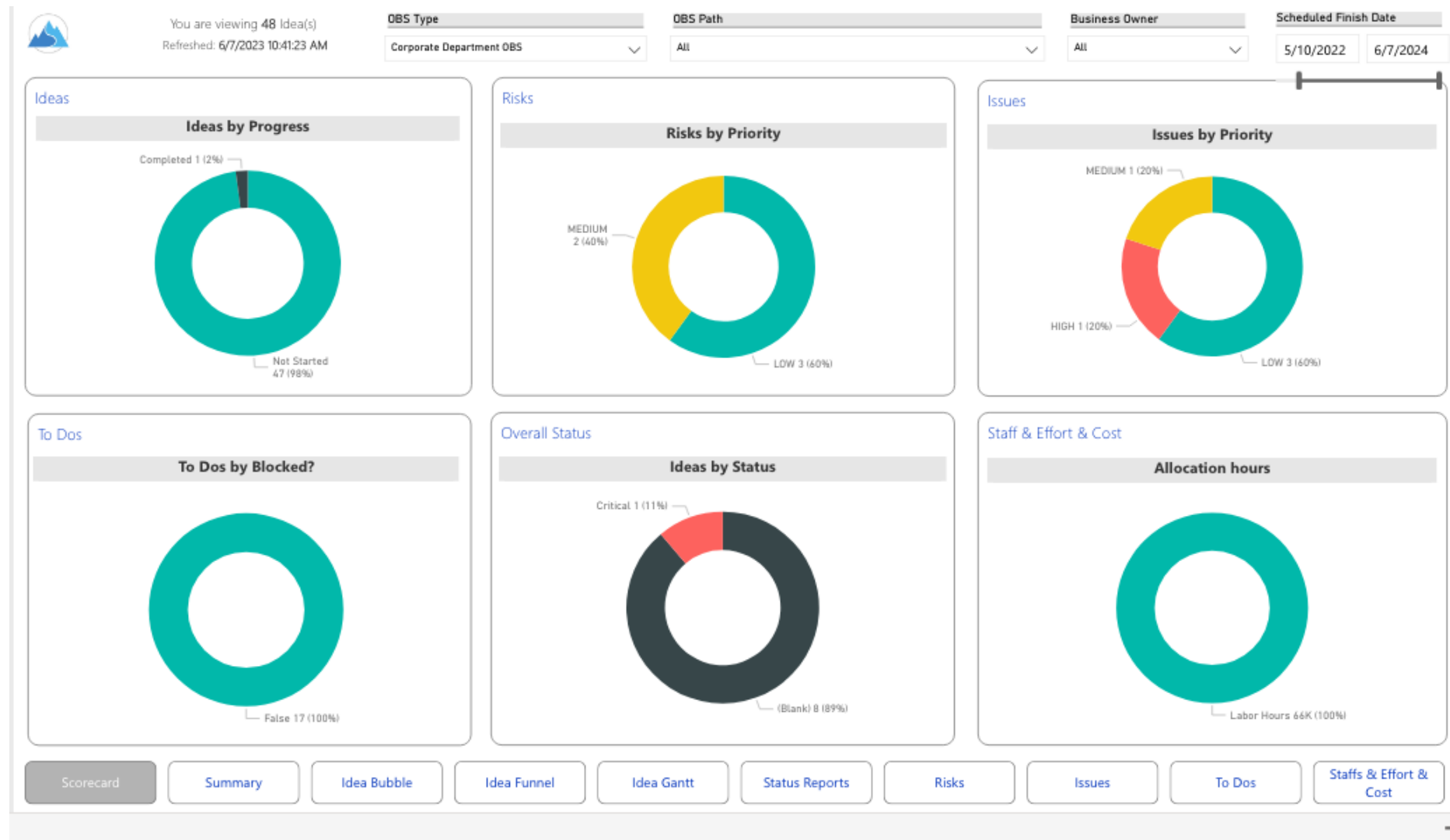
Timesheet Detail

 Timesheet Detail		Last Refreshed: 10/30/2025 1:48:53 P...		Resource OBS	Resource Manager	Resource	First Day of Work Week			
				All	All	All	Default (Monday)			
				Group By	Timesheet Status	Time Period	Tuesday			
				Resource Manager	All	All	Wednesday			
				Employment Type	Include Inactive Resources?	Include Zero Hour Timesheets?	Thursday			
				All	All	Multiple selections	Friday			
							Saturday			
							Sunday			

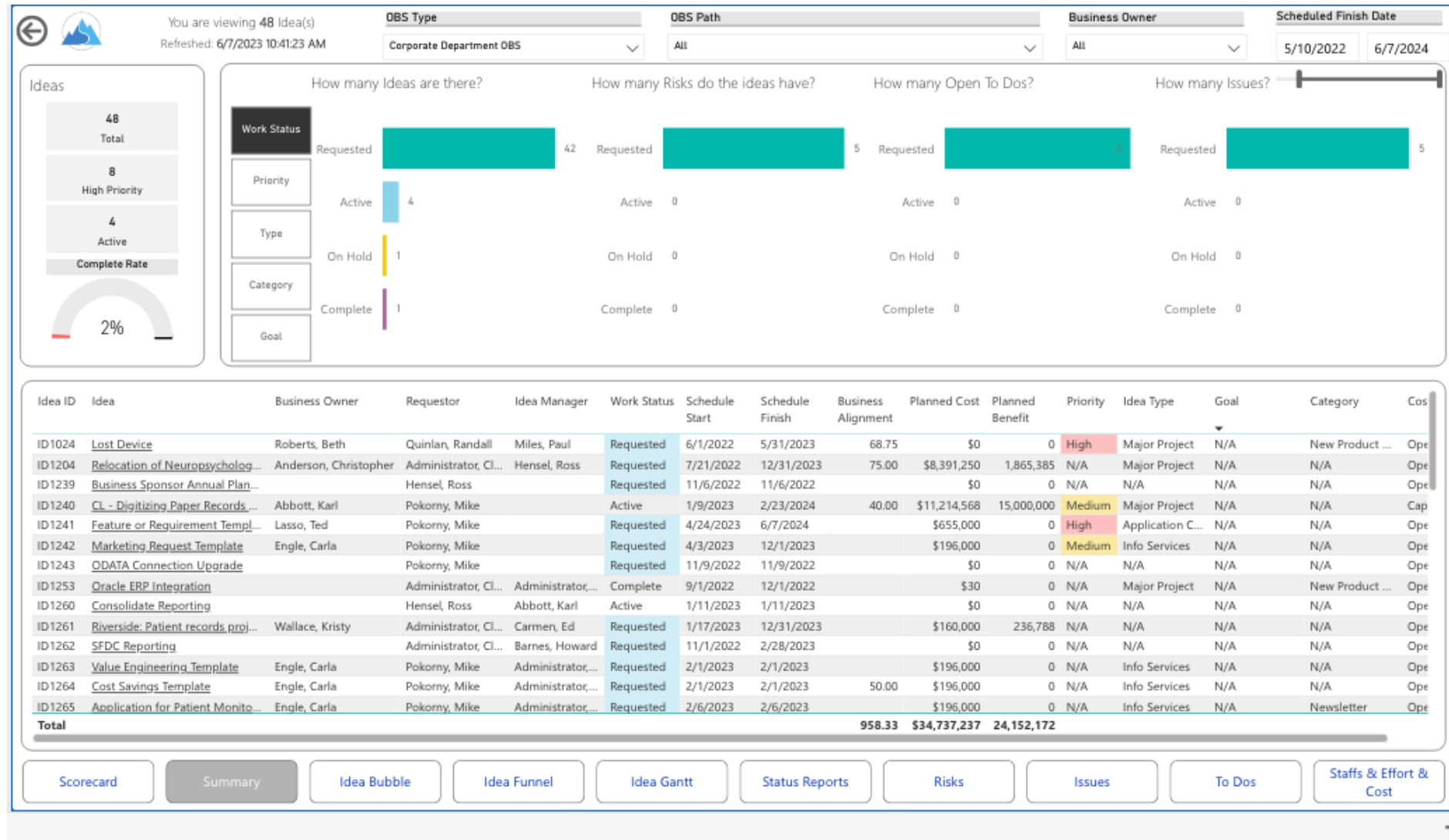
Resource Name	Period Text Only	Record Type Category	Investment Name	Description	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Amos, Cheryl	Total				32.00	32.00	32.00	32.00	32.00	
	03/24/2025 03/30/2025	Tasks	DPM Loan App Rel 4.0	Iterative Planning	4.00	4.00	4.00	4.00	4.00	
			Payment API Work	Data Exchange Solution	2.00	2.00	2.00	2.00	2.00	
				Ensure API's Public	2.00	2.00	2.00	2.00	2.00	
	07/07/2025 07/13/2025	Tasks	Client- Professional Service	Initial Task	8.00	8.00	8.00	8.00	8.00	
	07/14/2025 07/20/2025	Tasks	Client- Professional Service	Initial Task	8.00	8.00	8.00	8.00	8.00	
Arpel, Ian	07/21/2025 07/27/2025	Tasks	Client- Professional Service	Initial Task	8.00	8.00	8.00	8.00	8.00	
	Total				97.90	73.40	76.40	76.40	84.40	12.00
	01/13/2025 01/19/2025	Tasks	Relocate Infrastructure to Las Vegas Data Center	Database Development	4.40	4.40	4.40	4.40	4.40	
				Lessons Learned	6.00	5.00	4.00	3.00		
	02/24/2025 03/02/2025	Tasks	Relocate Infrastructure to Las Vegas Data Center	Database Development	1.25	1.50	1.00		10.00	8.00
				Lessons Learned	2.00		1.00	5.00		
	03/17/2025 03/23/2025	Tasks	ABLE Payments 2/0	Database Development	18.25					
			Relocate Infrastructure to Las Vegas Data Center	Database Development	1.00	1.50	1.00		10.00	
				Lessons Learned	2.00		1.00	5.00		
	03/24/2025 03/30/2025	Tasks	Relocate Infrastructure to Las Vegas Data Center	Complete Project Plan	8.00	8.00	8.00	8.00	8.00	
	04/21/2025 04/27/2025	Tasks	ABLE Payments 2/0	Coles User Group Demo Apr 2025	8.00			8.00	8.00	
			Relocate Infrastructure to Las Vegas Data Center	Lessons Learned		8.00				
				Risk Response and Mitigation Plan			8.00			
	04/28/2025 05/04/2025	Tasks	ABLE Payments 2/0	Coles User Group Demo Apr 2025	8.00			8.00	8.00	
			Relocate Infrastructure to Las Vegas Data Center	Lessons Learned		8.00				
				Risk Response and Mitigation Plan			8.00			
	06/02/2025 06/08/2025	Tasks	Relocate Infrastructure to Las Vegas Data Center	Usability and User Acceptance Testing	8.00	8.00	8.00	8.00	8.00	
	06/09/2025 06/15/2025	Tasks	ABLE Payments 2/0	Coles User Group Demo Apr 2025			2.00		5.00	
			Email archival repository	Email archival repository			2.00			
			Relocate Infrastructure to Las Vegas Data Center	Lessons Learned					3.00	
	06/30/2025 07/06/2025	Tasks	ABLE Payments 2/0	Usability and User Acceptance Testing	8.00	8.00	5.00	8.00		
	07/07/2025 07/13/2025	Tasks	ABLE Payments 2/0	Coles User Group Demo Apr 2025		7.00	7.00	7.00	7.00	
			ABLE Payments 2/0	Coles User Group Demo Apr 2025		5.00	4.00	8.00	9.00	4.00
			Email archival repository	Email archival repository	8.00	6.00	5.00			
	08/04/2025 08/10/2025	Tasks	ABLE Payments 2/0	Coles User Group Demo Apr 2025	5.00	3.00	2.00			
Barry, Debra	Total				10.00		5.00	4.00	4.00	
	04/28/2025 05/04/2025	Tasks	Acme Managed Services	PSA Managed Services	4.40	4.40	4.40	4.40	4.40	

Ideas

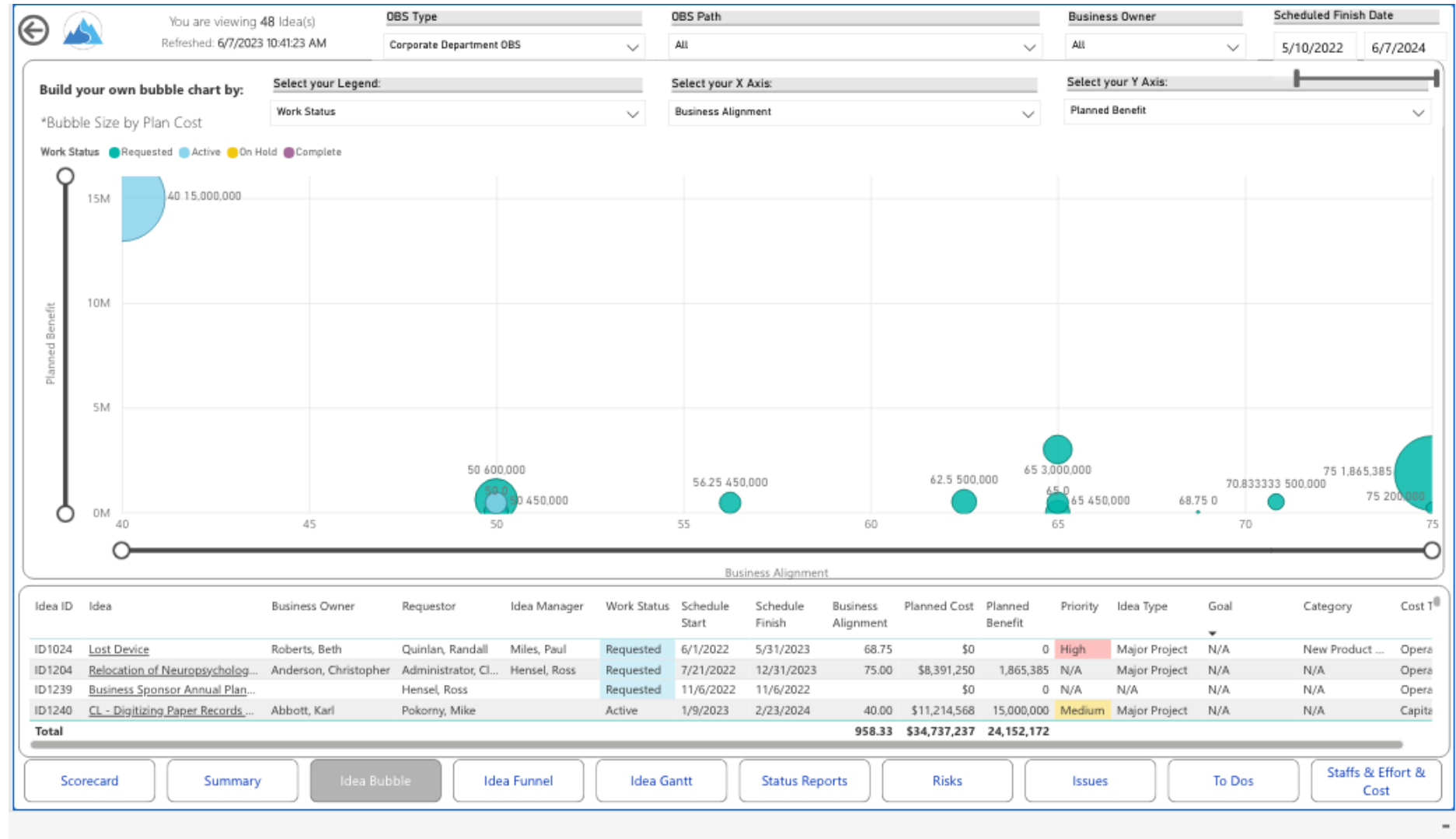
Idea Overview



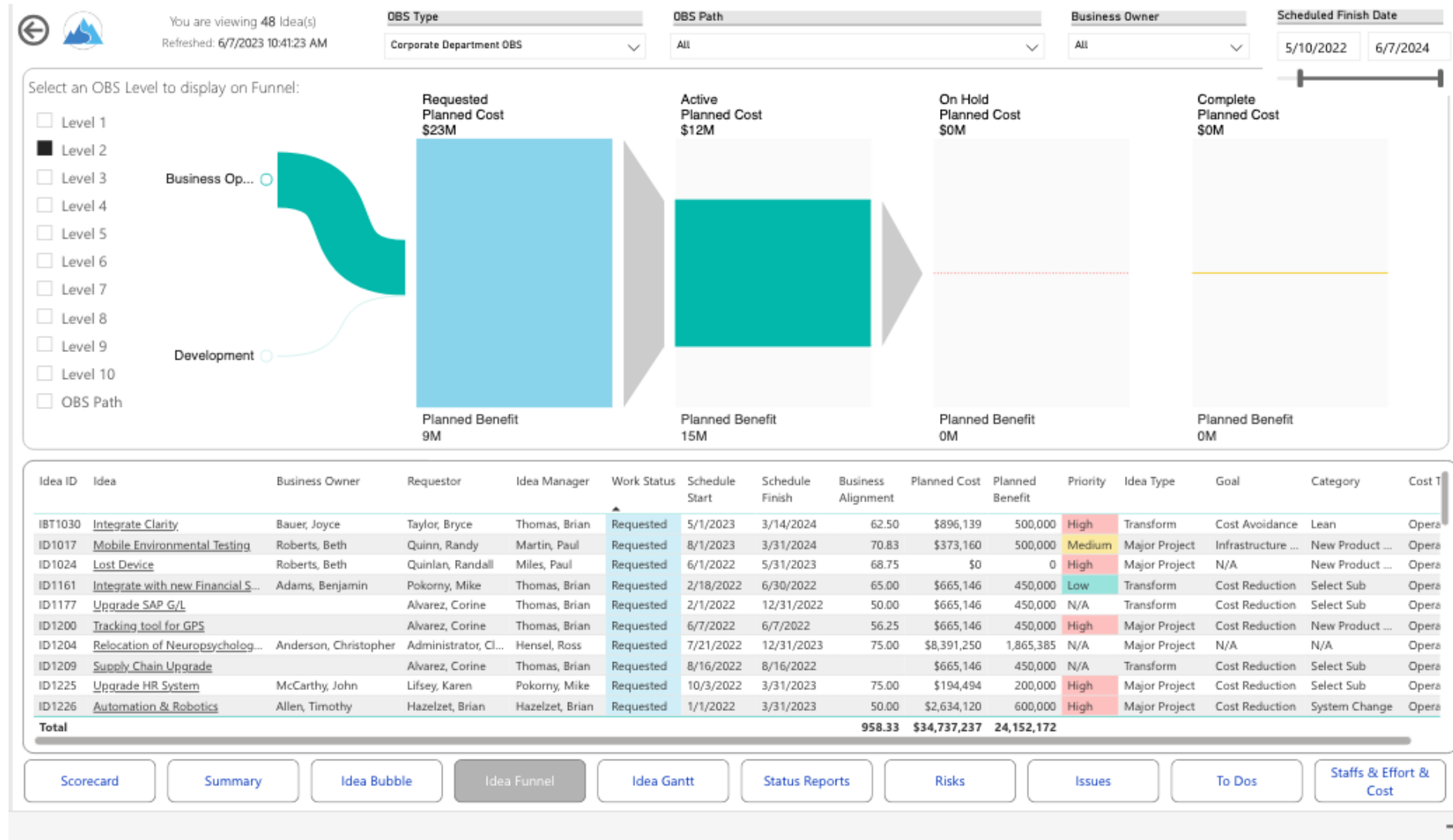
Idea Details

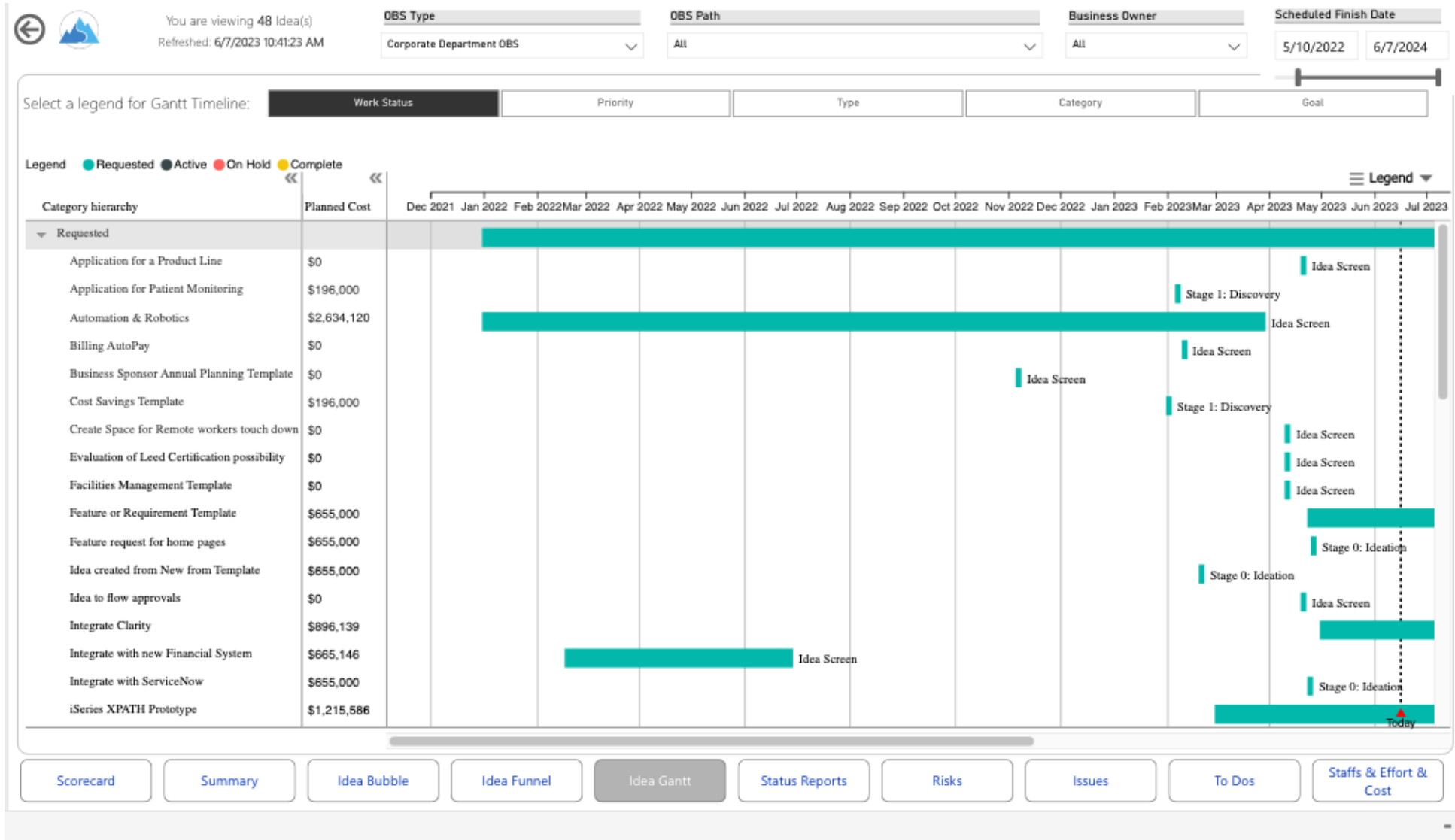


Idea Bubble

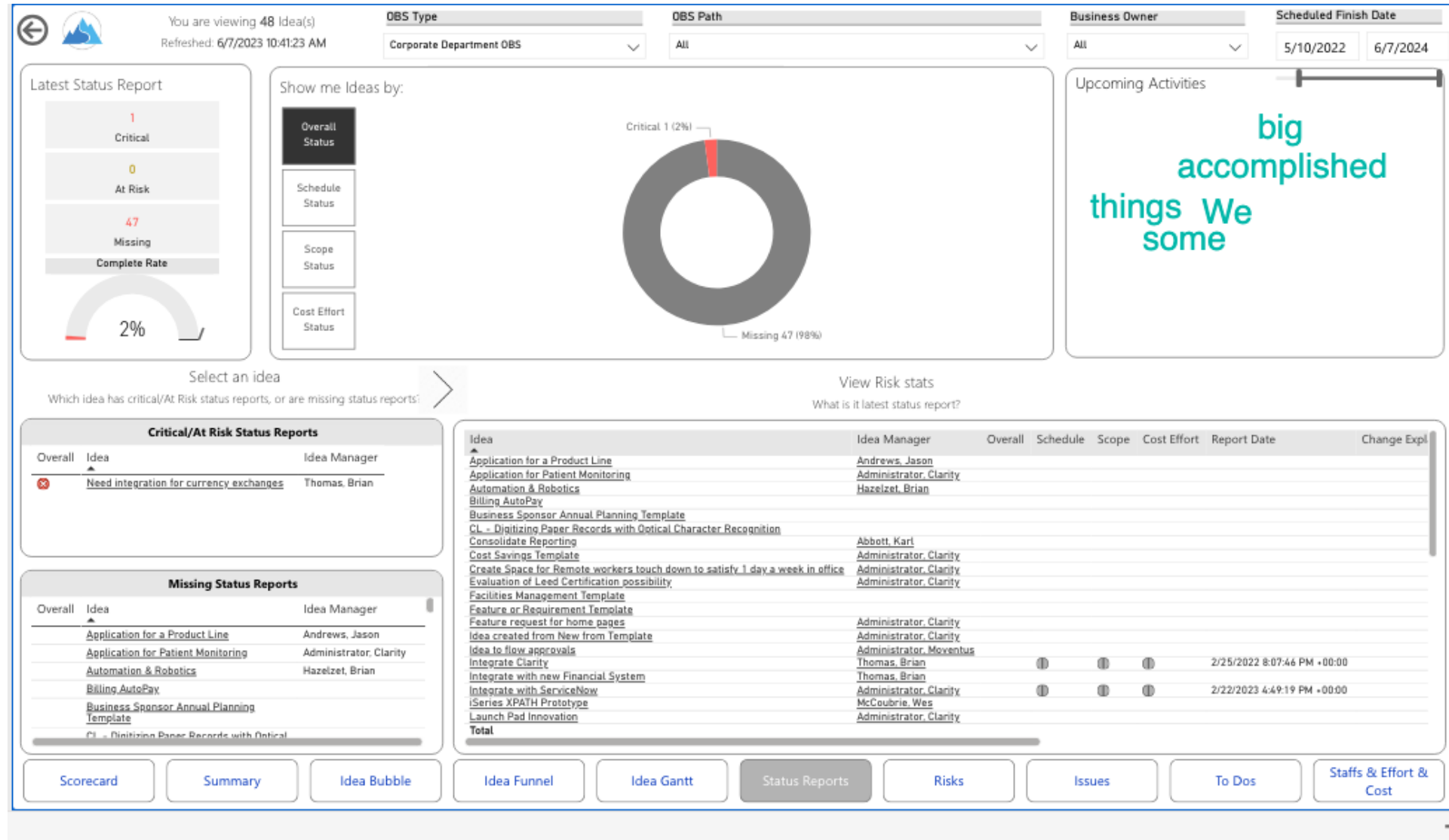


Idea Funnel

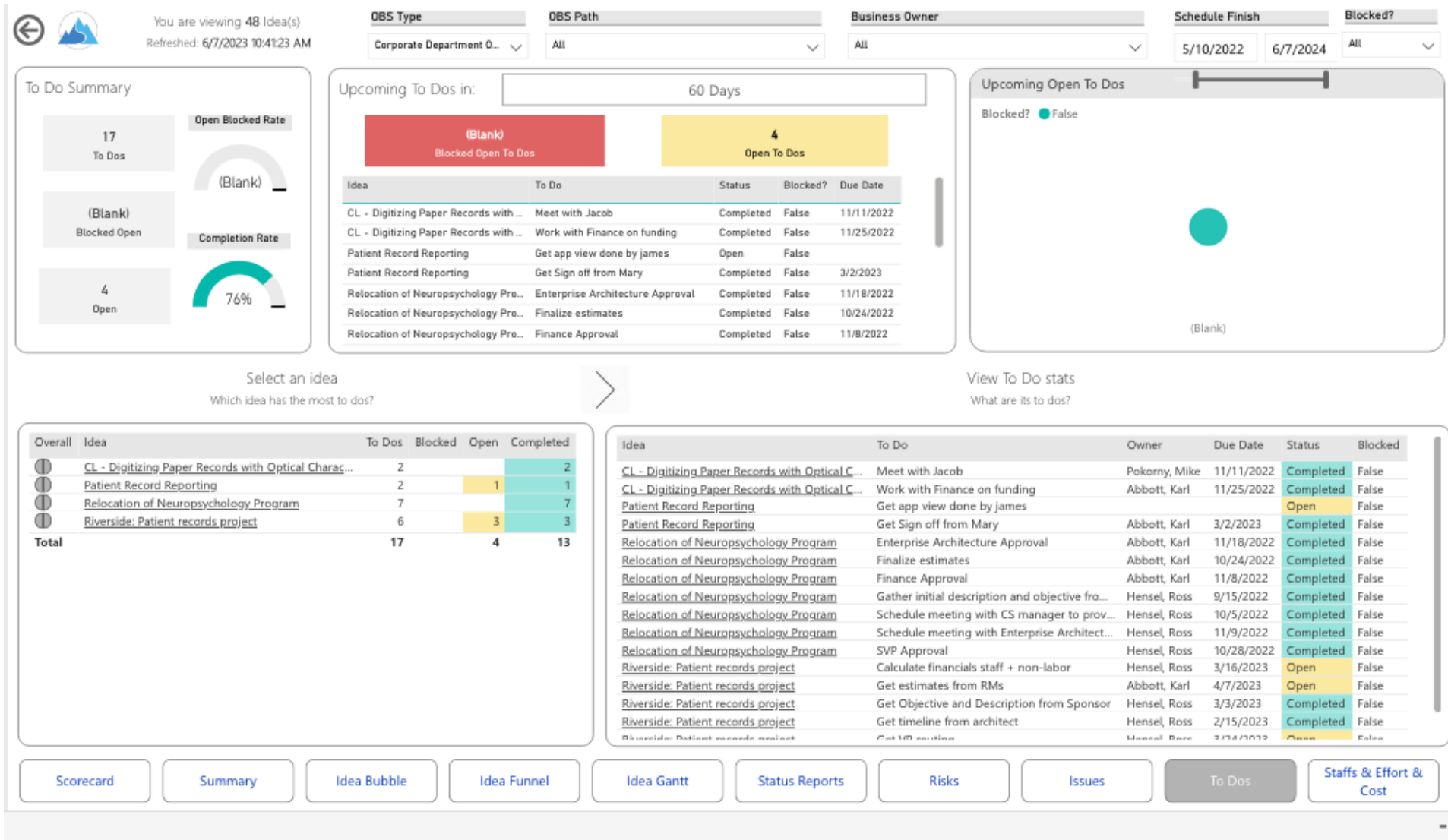




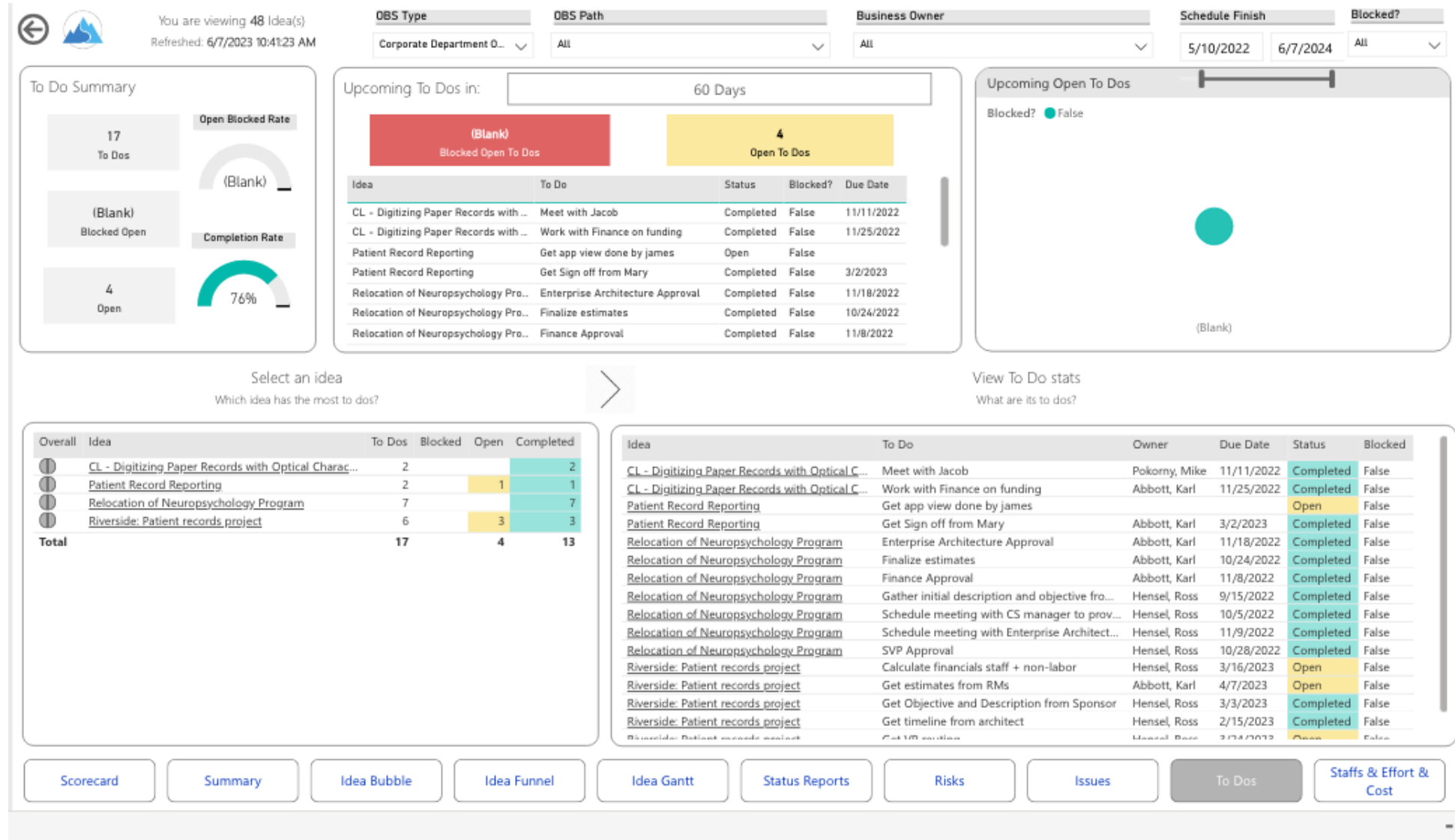
Idea Status



Idea To Do's

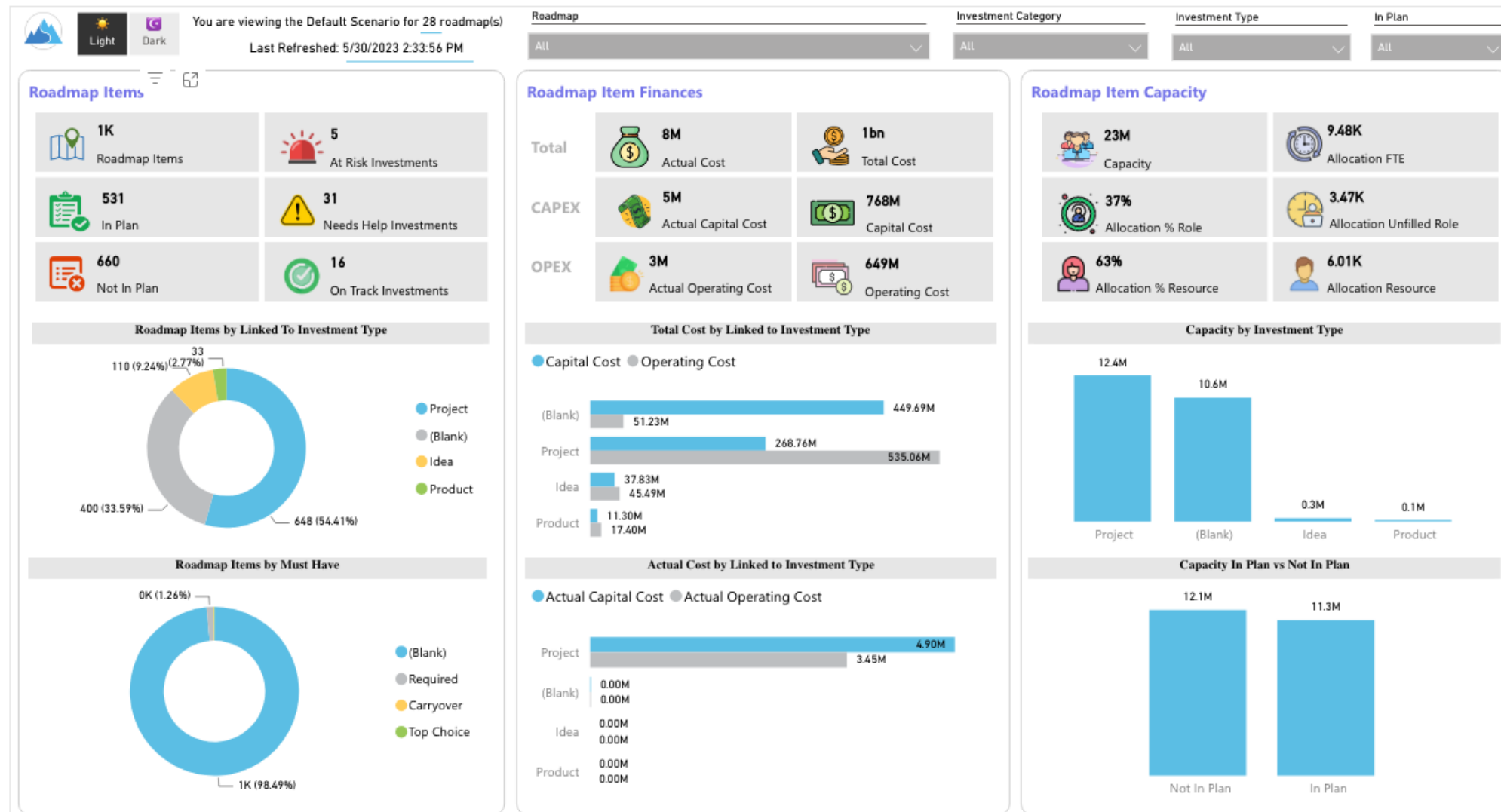


Idea Staff and Effort

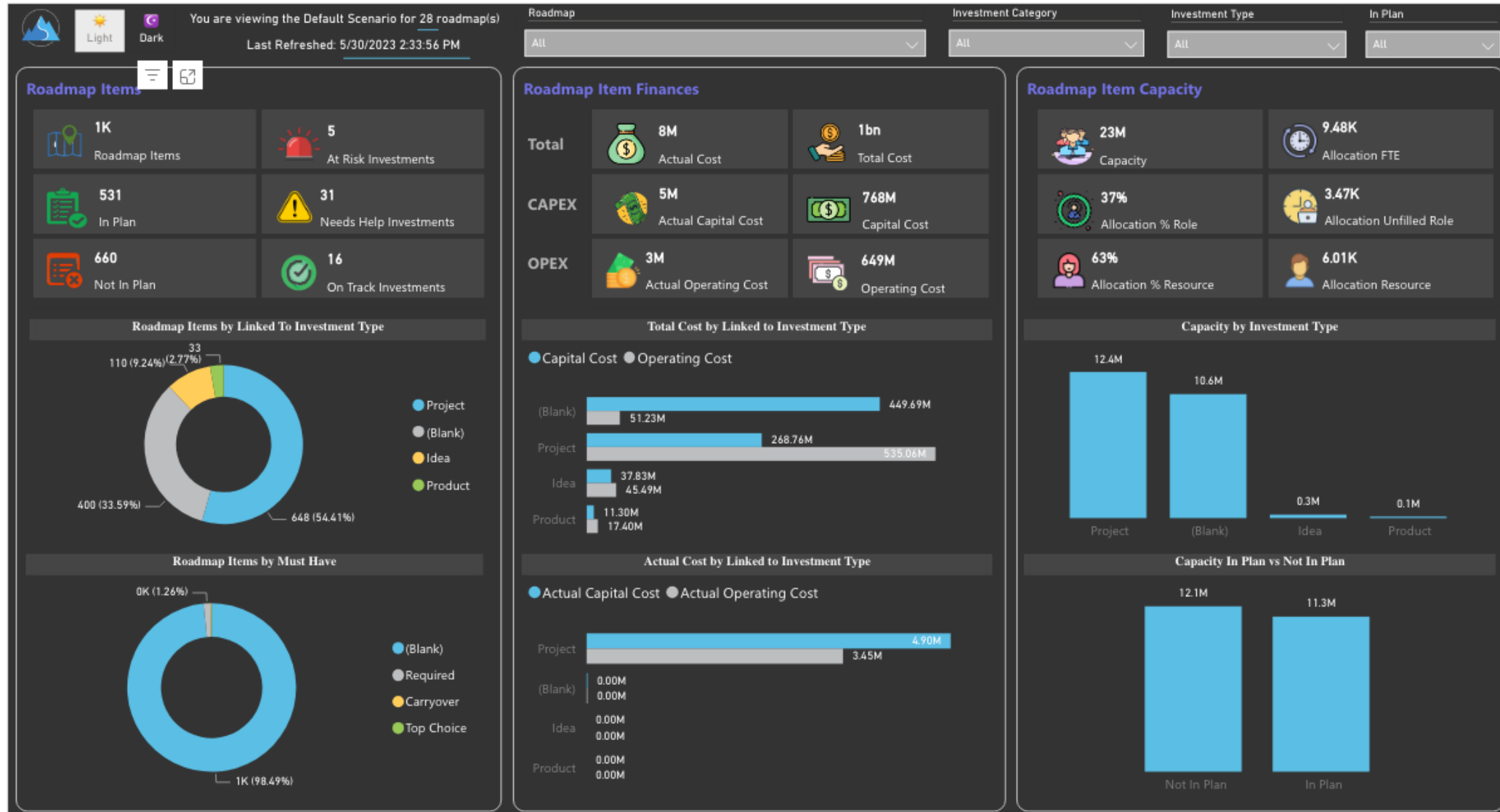


Roadmap

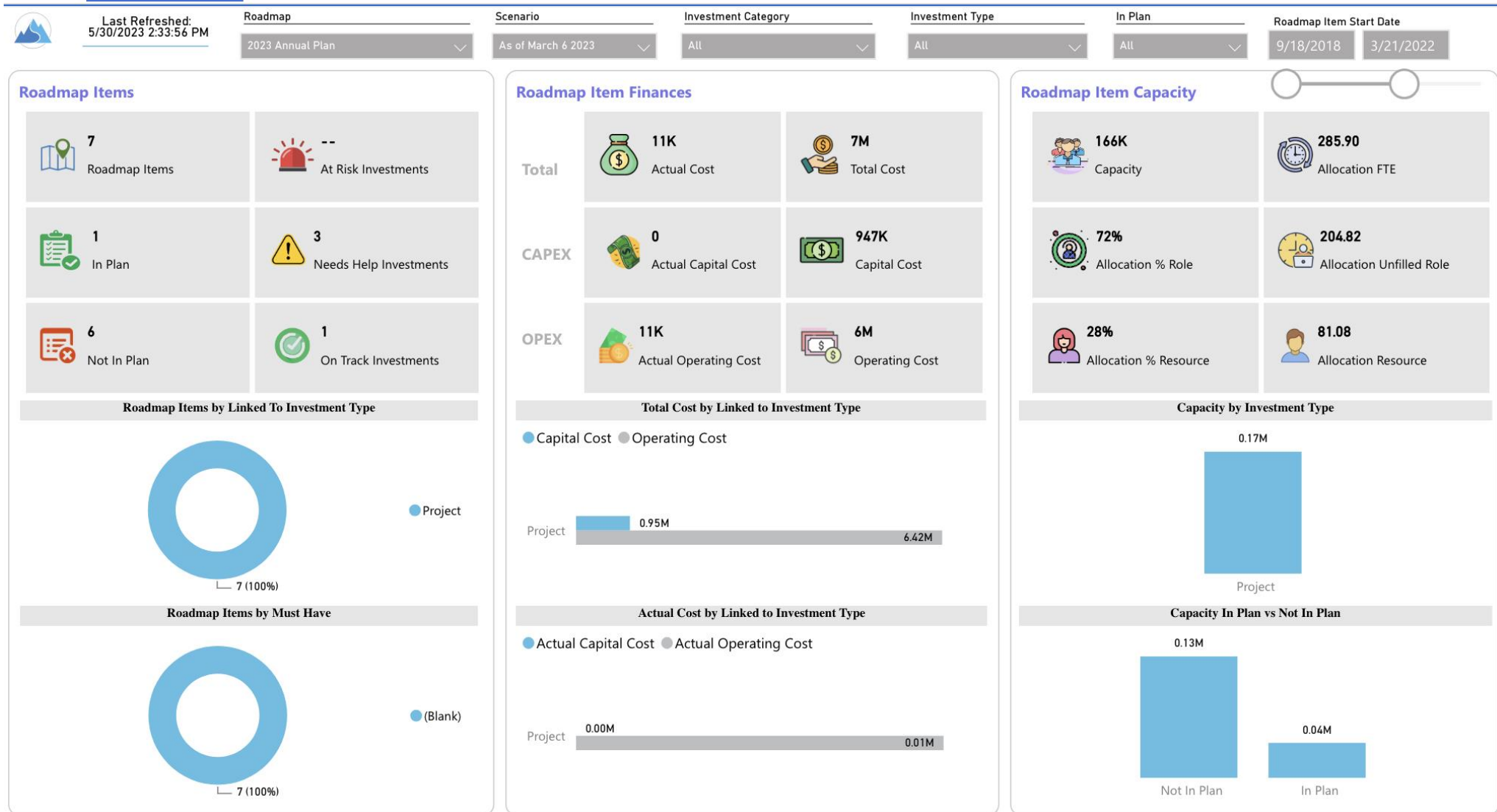
Roadmap Overview – Default Scenarios



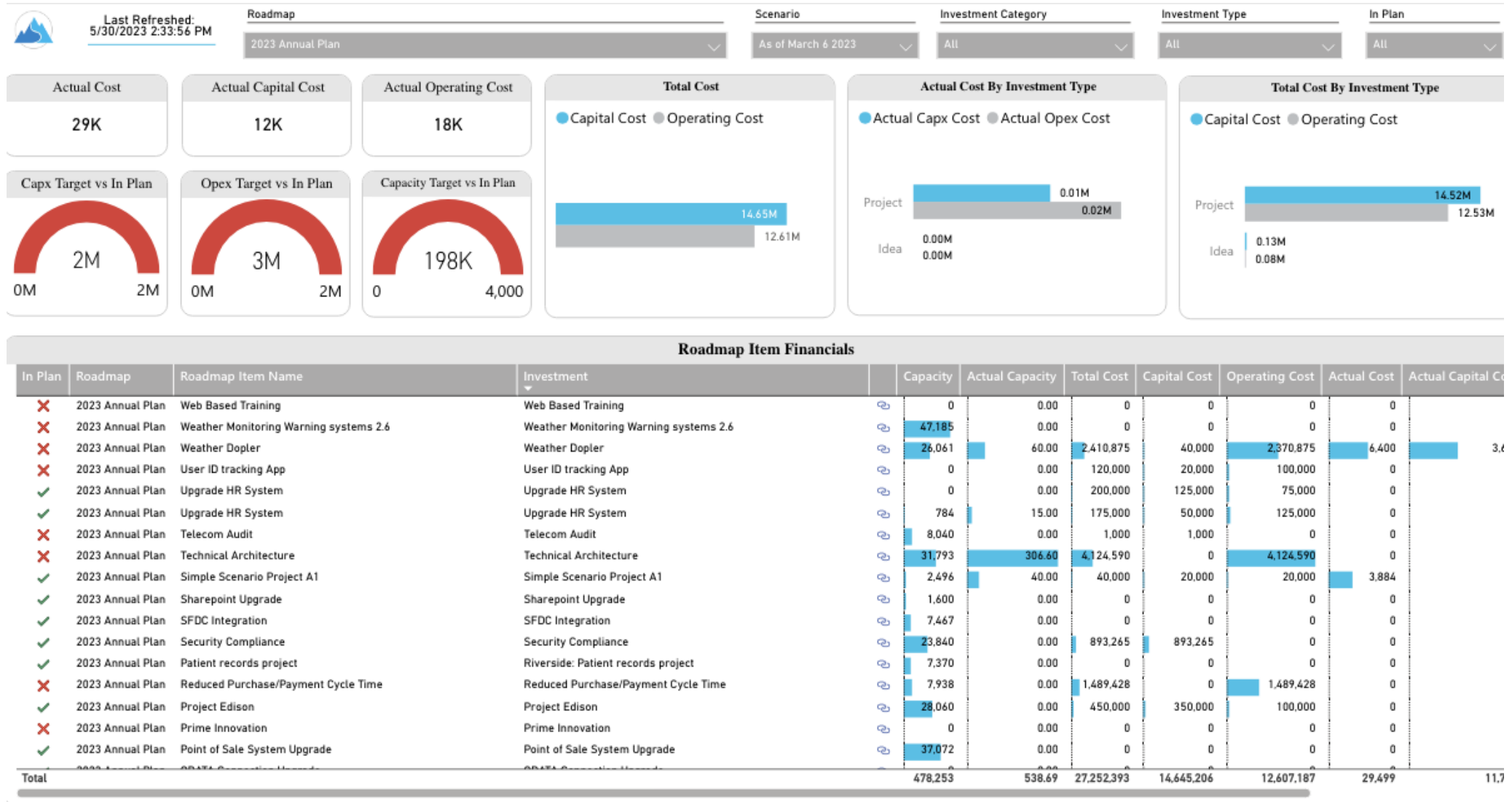
Roadmap Overview – Dark Mode



Roadmap Overview – Single Roadmap Selection



Roadmap Financials



Investment Details



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

Roadmap

2023 Annual Plan

Scenario

As of Feb 16 2023

Investment Category

All

Investment Type

All

In Plan

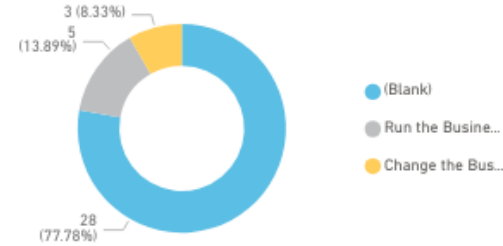
All

Roadmap Item Start Date

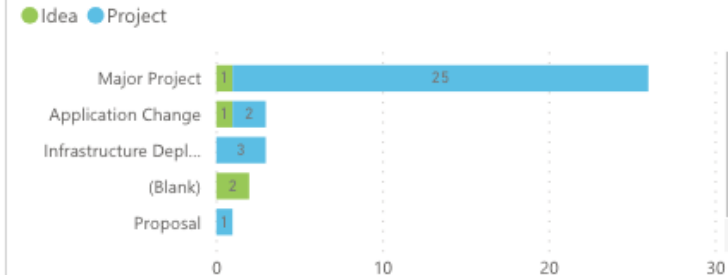
1/1/2021

1/1/2024

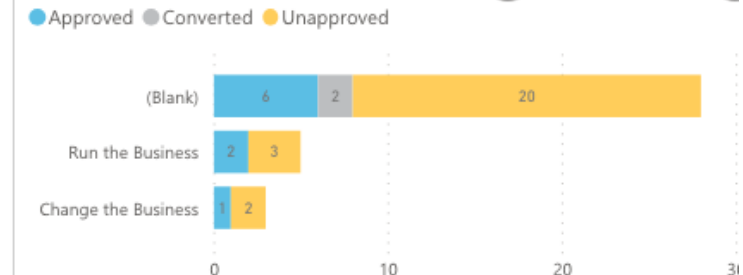
Investments by Category



Investments by Category



Investments by Category and Status



Roadmap Investments

Roadmap Item ID	Roadmap Item Name	Investment ID	Investment	Manager	Start Date	Finish Date	Category	Investment Type	Type
RI03478	2023 Enhancements for Online Shipping Site	PR1387	2023 Enhancements for Online Shipping Site	Administrator, Clarity	14-May-23	12-Feb-24		Project	Major P
RI03501	AARD Payments Modules 2023	PR1491	AARD Payments Modules 2023	Administrator, Clarity	09-Jan-23	09-Jan-24		Project	Major P
RI03479	Airport Access Security	PR1388	Airport Access Security	Martin, Paul	14-Jan-22	31-Dec-23		Project	Major P
RI03492	Aurora Project	PR1465	Aurora Project	Hensel, Ross	01-May-24	08-Aug-24		Project	Major P
RI03493	CL - Digitizing Paper Records with Optical Character Recognition	PR1477	CL - Digitizing Paper Records with Optical Character Recognition	Pokorny, Mike	31-Oct-22	23-Feb-24	Run the Business	Project	Major P
RI03496	Cost Out Project	PR1480	Cost Out Project	Administrator, Clarity	29-Nov-22	19-Mar-24		Project	Infrastr
RI03471	Credit Card Security Improvements	PR1013	Credit Card Security Improvements	Reed, Henry	13-Sep-23	30-Nov-23	Run the Business	Project	Major P
RI03472	Data Warehouse Performance Tuning	PR1027	Data Warehouse Performance Tuning	Martin, Paul	25-Feb-23	06-Jul-24	Change the Business	Project	Major P
RI03500	Delta3 - Application Revamp	PR1490	Delta3 - Application Revamp	Thomas, Brian	01-Jan-23	31-Dec-24		Project	Applica
RI03482	Enhancement to Monitoring tools	PR1396	Enhancement to Monitoring tools	Martin, Paul	25-Mar-23	31-Jan-24		Project	Major P
RI03481	Eureka Project	PR1395	Eureka Project	Martin, Paul	23-Sep-23	17-Mar-24	Change the Business	Project	Major P
RI03495	Infrastructure Project Example	PR1479	Infrastructure Project Example	Administrator, Clarity	22-Nov-22	24-Feb-23		Project	Major P
RI03498	Integration to SFDC	PR1485	Integration to SFDC	Administrator, Clarity	20-Dec-22	27-Mar-23		Project	Major P
RI03485	iSeries Location Tracking	PR1402	iSeries Location Tracking	McCoubrie, Wes	01-Jun-23	30-Dec-23		Project	Major P
RI03484	iSeries Mobile Dashboard	PR1400	iSeries Mobile Dashboard	McCoubrie, Wes	03-Jan-22	21-Feb-23		Project	Major P
RI03467	iSeries XPATH Prototype	ID1248	iSeries XPATH Prototype	McCoubrie, Wes	14-Nov-22	14-Nov-23		Idea	Applica
RI03494	Mobile Planner V3	PR1478	Mobile Planner V3	Miles, Paul	21-Nov-22	11-May-26		Project	Major P
RI03476	New Email Archival Repository Project	PR1340	New Email Archival Repository Project	Madden, Paul	01-Oct-21	31-Jan-25		Project	Major P
RI03465	ODATA Connection Upgrade	ID1243	ODATA Connection Upgrade		13-Apr-23	09-Sep-23		Idea	
RI03480	Point of Sale System Upgrade	PR1390	Point of Sale System Upgrade	Administrator, Clarity	06-Feb-22	26-Aug-24	Change the Business	Project	Major P
RI03483	Prime Innovation	PR1397	Prime Innovation	Administrator, Clarity	08-Mar-22	27-Jun-23		Project	Major P
RI03489	Project Edison	PR1435	Project Edison	Martin, Paul	09-Aug-22	30-Oct-23		Project	Major P

Scenario Comparison

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

Roadmap Name

2023 Annual Plan

Scenario (Select 2)

Multiple selections

Roadmap Item

All

Roadmap Status

Draft

Roadmap Description

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

Capital Cost

As of March 6 2023 POR - Default Scenario

Target

In Plan

Variance

2,000,000

2,325,632

-325,632

80,000

2,071,556

-1,991,556

Operating Cost

As of March 6 2023 POR - Default Scenario

Target

In Plan

Variance

1,999,999

2,671,178

-671,179

1,999,999

196,388.31

-17,638,832

Capacity

As of March 6 2023 POR - Default Scenario

Target

In Plan

Variance

4,000

197,894

-193,894

4,000

355,779

-351,779

Select to view only roadmap items with delta:

Capacity

Capital Cost

Operating Cost

Roadmap Item Name

Capacity

AARD Payments Modules 2023

13,145.70

Airport Access Security

-6,299.80

CL - Digitizing Paper Records with Optical Character Recognition

-33,652.00

Data Warehouse Performance Tuning

-504.00

Eureka Project

-1,256.00

iSeries Location Tracking

-1,461.39

Patient records project

7,370.40

Riverside: Patient records project

-7,370.40

Weather Monitoring Warning systems 2.6

298.55

Total Delta

-29,728.94

Select to view scenario comparison details:

Roadmap Item Name

As of March 6 2023

POR - Default Scenario

Delta

Web Based Training

Roadmap Item Start Date

6/2/2023

1/9/2023

-144.00

Roadmap Item Finish Date

9/5/2023

4/14/2023

-144.00

CLARITY_UPDATED_DATE

3/5/2023 9:16:08 PM +00:00

1/18/2023 8:29:50 PM +00:00

Weather Monitoring Warning systems 2.6

Roadmap Item Start Date

3/7/2023

1/7/2023

-59.00

Roadmap Item Finish Date

6/13/2023

4/28/2023

-46.00

Remaining Capacity

47184.55171

46877

307.55

RANK

6

6

6

In Plan

Not In Plan

In Plan

CLARITY_UPDATED_DATE

3/5/2023 9:16:08 PM +00:00

1/18/2023 8:29:50 PM +00:00

Capacity

47184.55171

46886

298.55

Actual Capacity

0

9

-9.00

Weather Dopler

Roadmap Item Start Date

10/3/2023

1/1/2022

-640.00

Roadmap Item Finish Date

10/8/2024

1/7/2023

-640.00

RANK

2

2

2

In Plan

Not In Plan

In Plan

CLARITY_UPDATED_DATE

3/5/2023 9:16:08 PM +00:00

1/18/2023 8:29:50 PM +00:00

User ID tracking App

Total Cost

120000

0

120,000.00

Roadmap Item Start Date

11/19/2022

11/19/2021

-365.00

Roadmap Item Finish Date

9/3/2023

12/5/2022

-272.00

Remaining Total Cost

120000

0

120,000.00

Remaining Operating Cost

100000

0

100,000.00

Remaining Capital Cost

20000

0

20,000.00

RANK

4

4

4

Operating Cost

100000

0

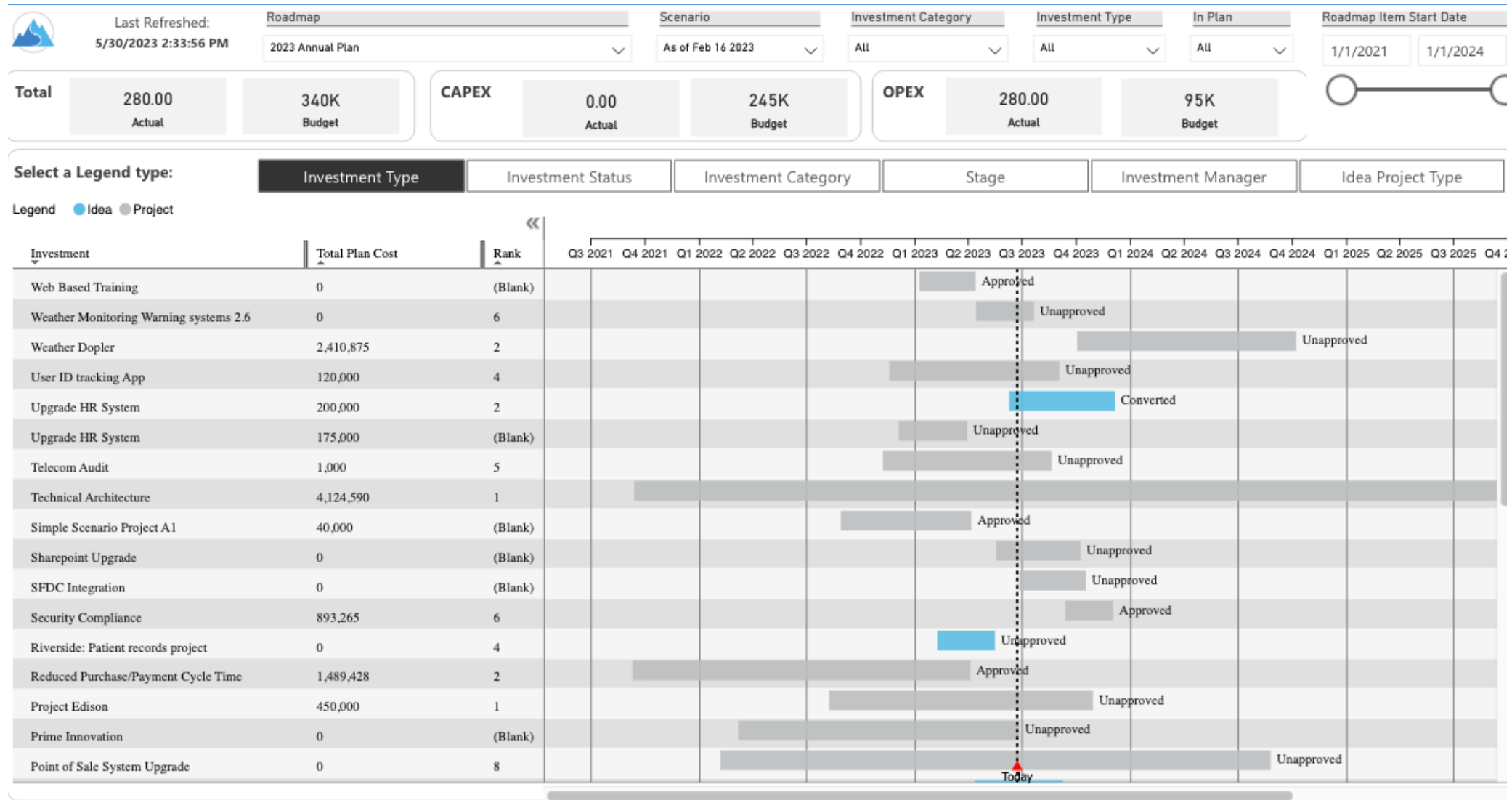
100,000.00

In Plan

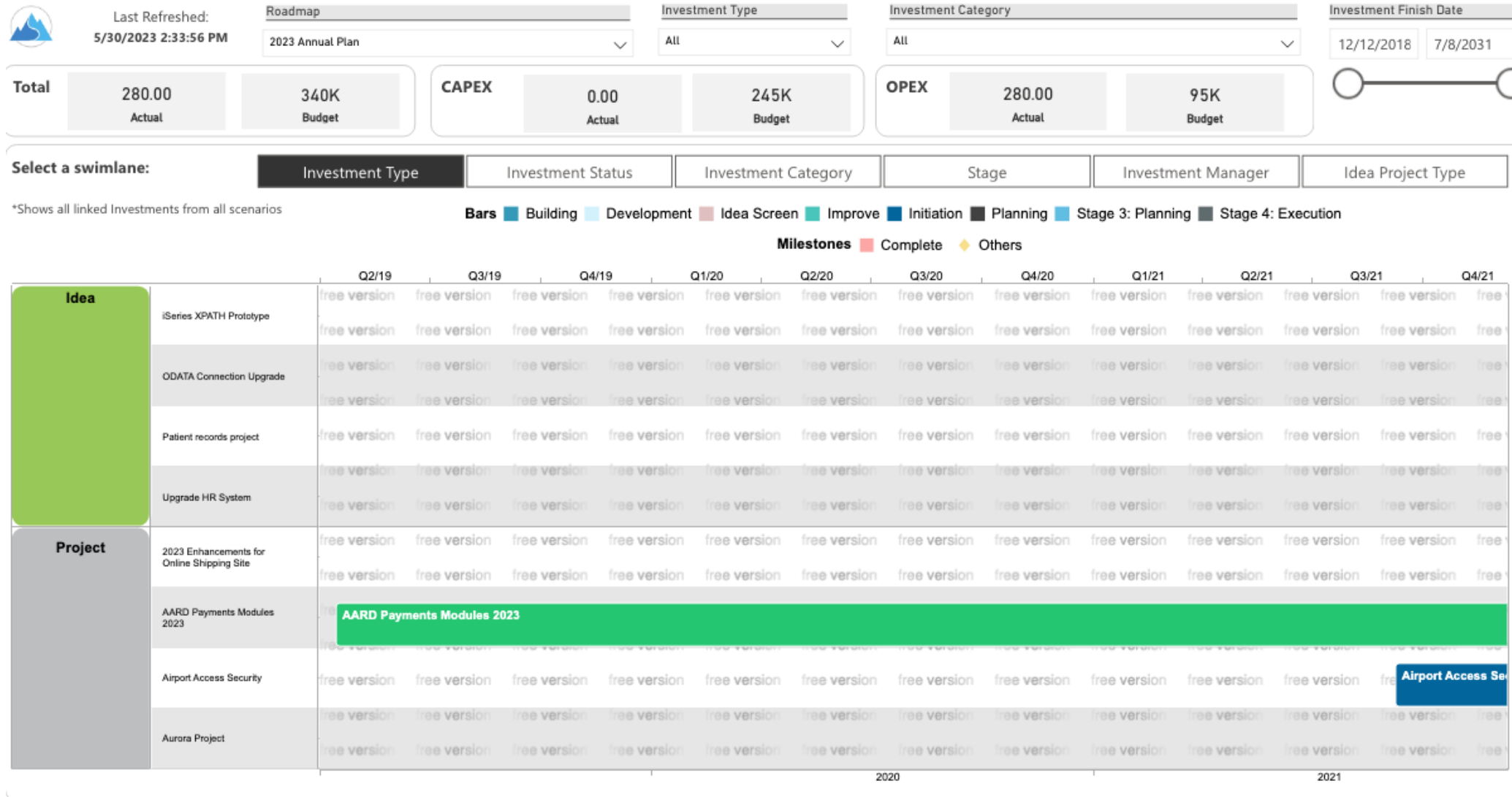
Not In Plan

In Plan

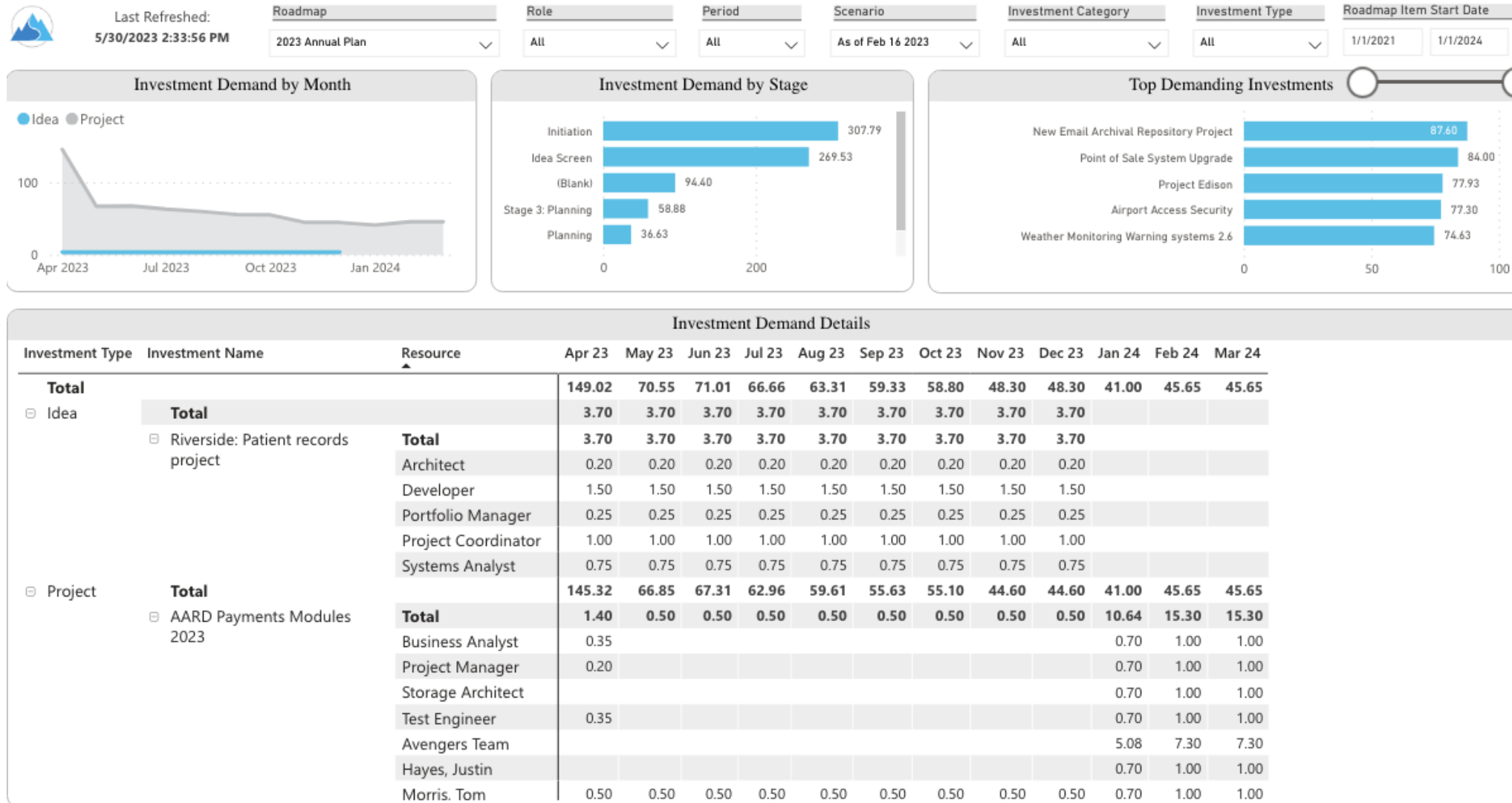
Roadmap Item Gantt



Roadmap Investment Gantt



Resource Investment Demand



Scenario Comparison



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

Roadmap Name
2023 Annual Plan

Scenario (Select 2)
Multiple selections

Roadmap Item
All

Roadmap Status
(Blank)

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

Capital Cost

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

Operating Cost

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

Capacity

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

Select to view only roadmap items with delta:

Capacity

Capital Cost

Operating Cost

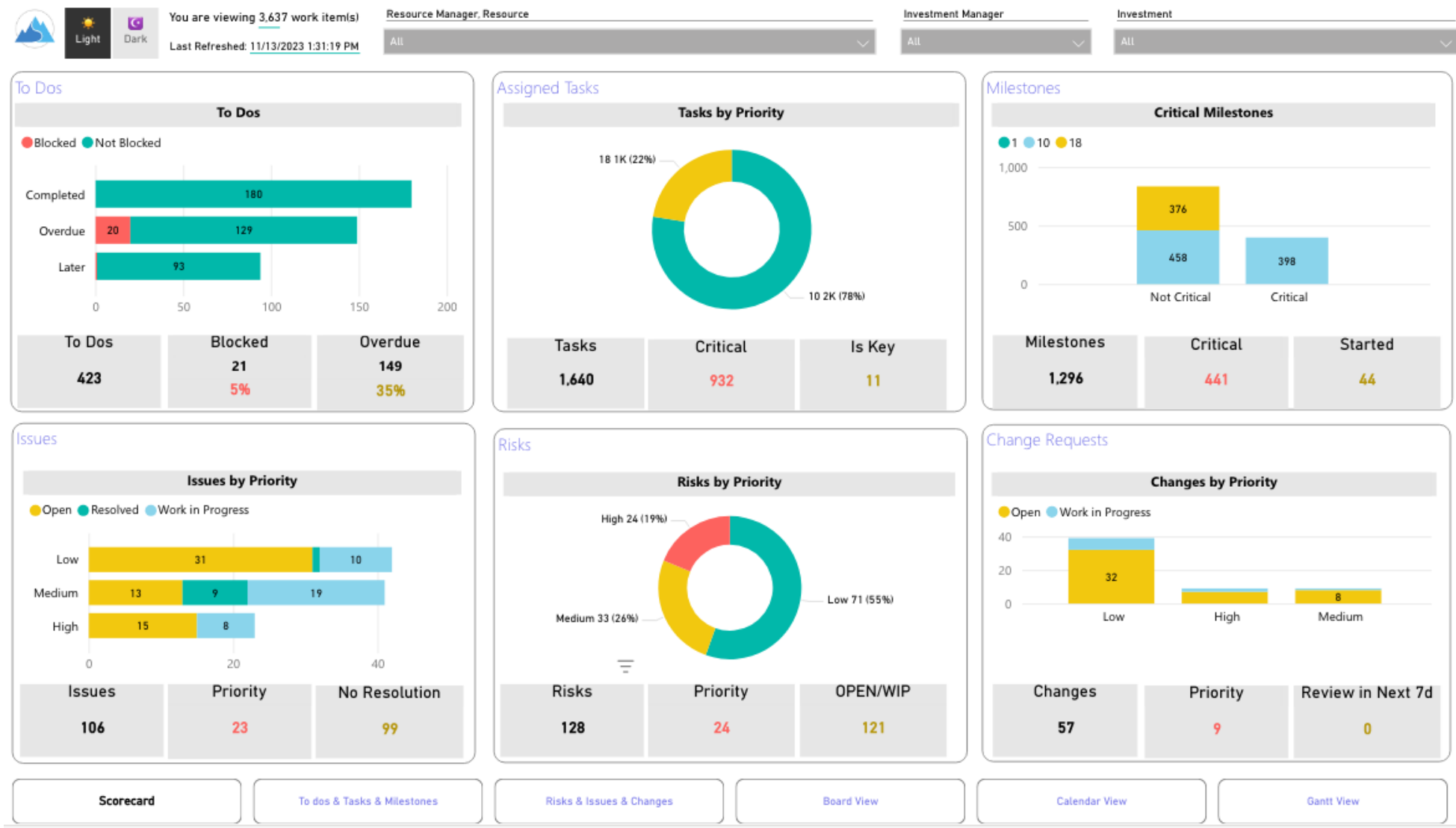
Roadmap Item Name	Capacity
SFDC Integration	2,986.67
Security Compliance	11,040.00
Reduced Purchase/Payment Cycle Time	3,240.00
Patient records project	7,370.40
iSeries Location Tracking	3,226.61
Eureka Project	1,548.00
Cost Out Project	-1,469.79
CL - Digitizing Paper Records with Optical Character Recognition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

Select to view scenario comparison details:

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

Work Management

Scorecard



Scorecard

To dos & Tasks & Milestones

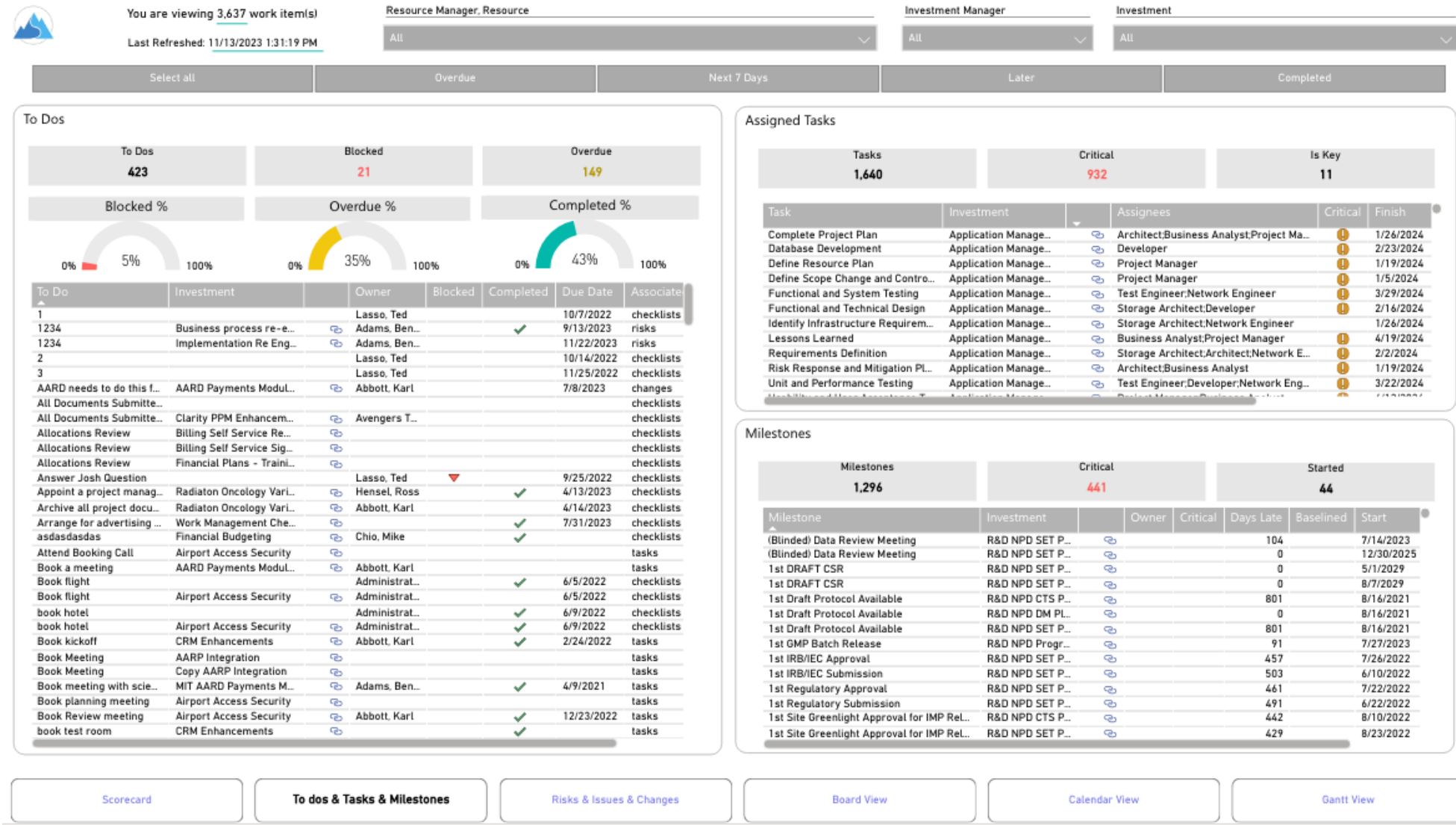
Risks & Issues & Changes

Board View

Calendar View

Gantt View

To Do's, Tasks and Milestones



Work Risk, Issue, and Change



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

Resource Manager, Resource
All

Investment Manager
All

Investment
All

Select allOverdueNext 7 DaysLaterCompleted

Risks

Risks128

Priority24

OPEN/WIP121

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

Issues

Issues106

Priority23

No Resolution99

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

Change Requests

Change Requests57

Priority9

Review in Next 7 Days0

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

Scorecard

To dos & Tasks & Milestones

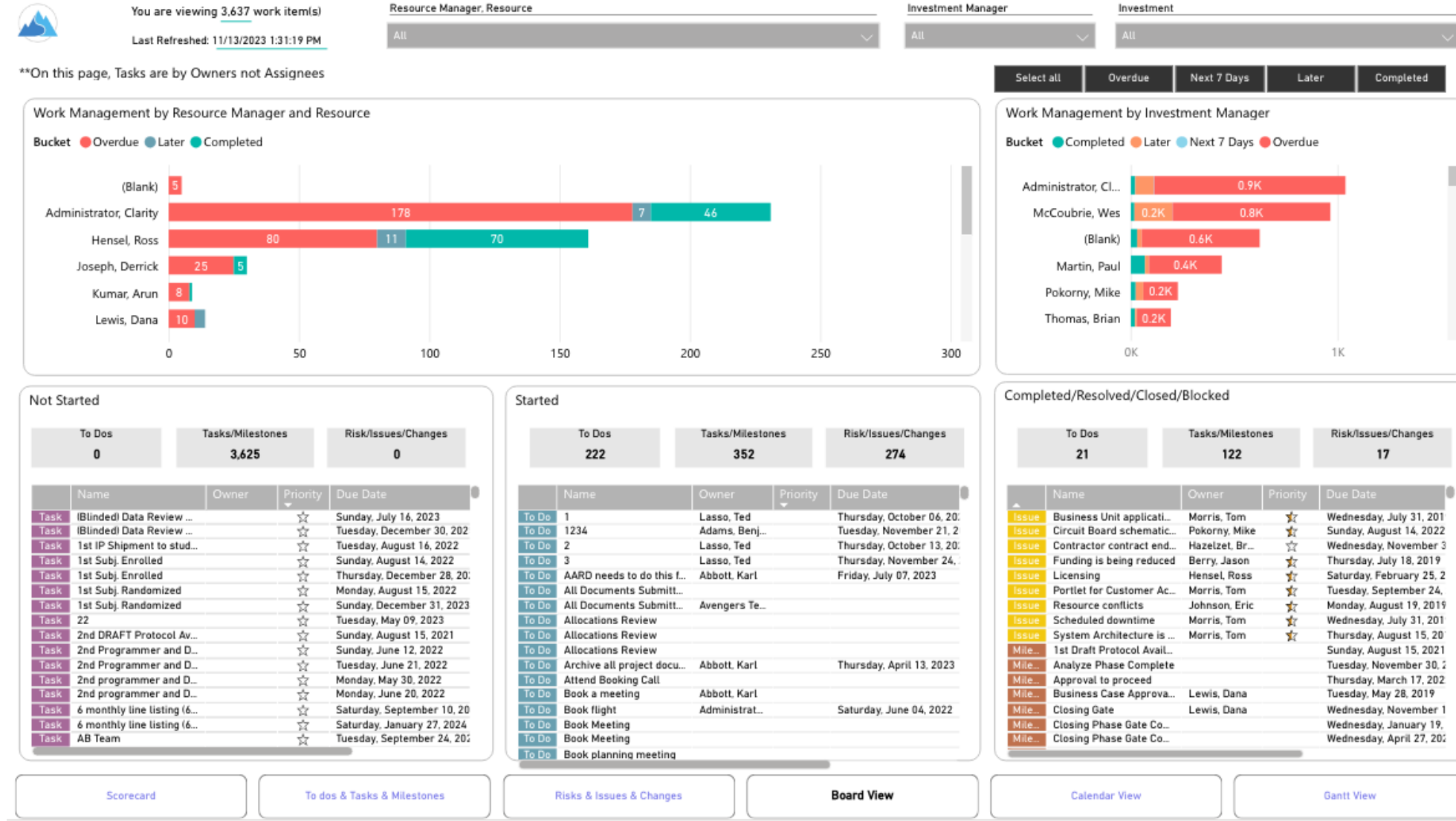
Risks & Issues & Changes

Board View

Calendar View

Gantt View

Board View



Calendar View



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

Resource Manager, Resource

Investment Manager

Investment

Task

To Do

Milestone

Issue

Risk

Change

290

274

162

10

7

0

Select all

Overdue

Next 7 Days

Later

Completed

Due Date

10/30/2016

7/7/2031

Priority

Status

Owner

Bucket

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

Status

● Open

● Completed

● Blocked

● Started

● Not Started

● Resolved

● Closed

<

>

Today

July 2023

Month

Week

Day

List

Scorecard

To dos & Tasks & Milestones

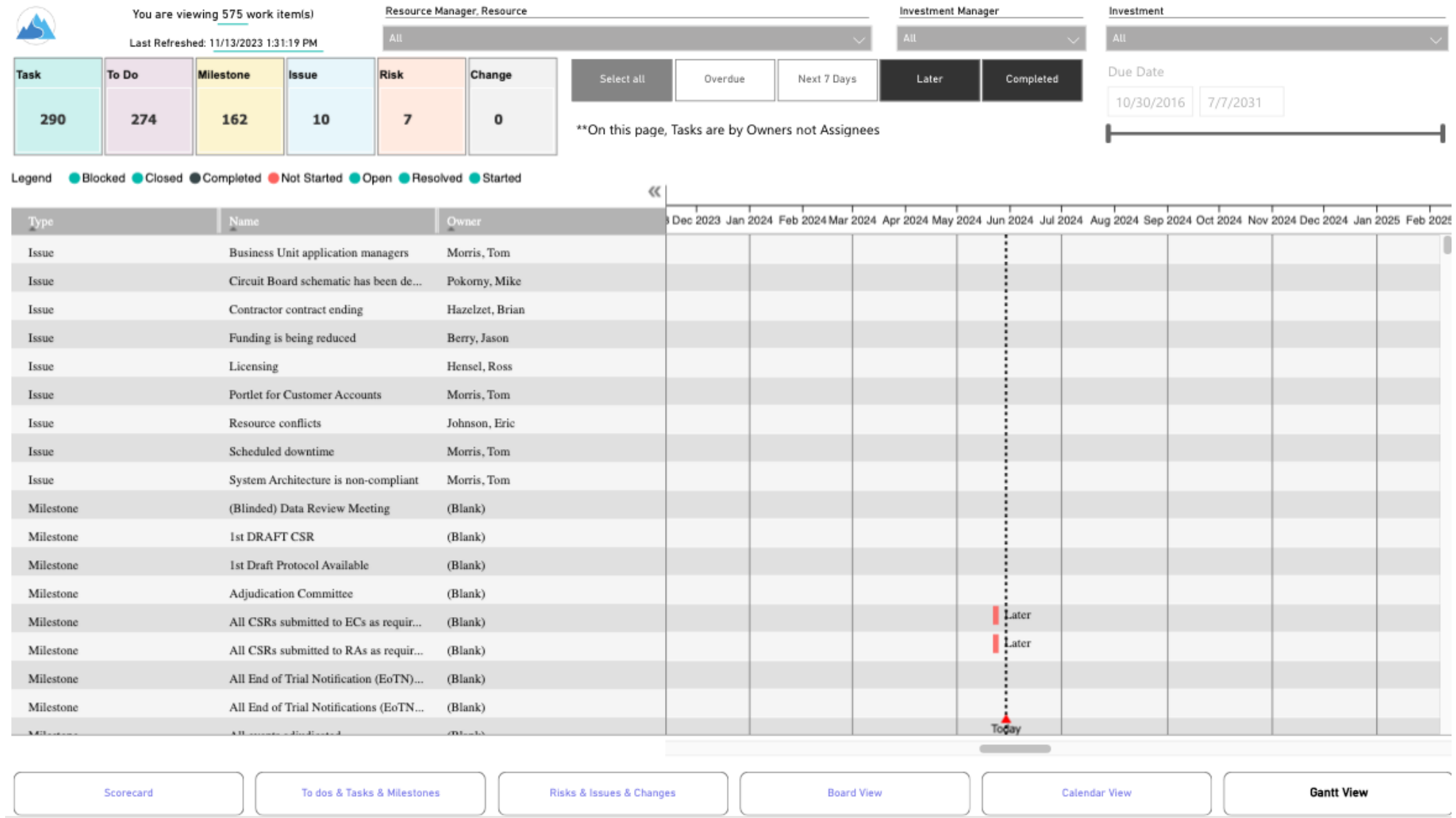
Risks & Issues & Changes

Board View

Calendar View

Gantt View

Gantt View



Portfolio

Investments and Hierarchy



Let Rego be your guide.

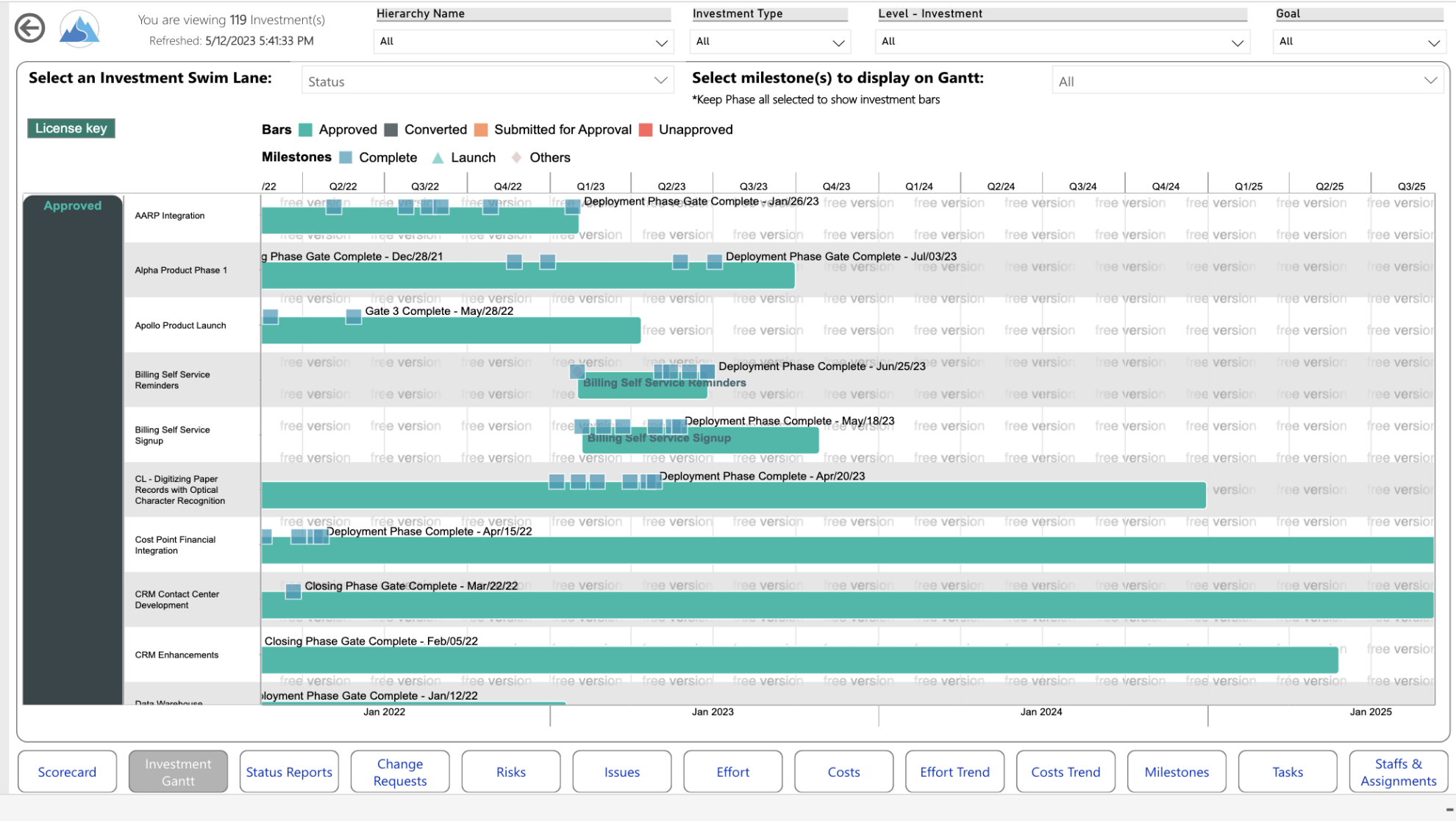
regoUniversity2026



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regoUniversity2026

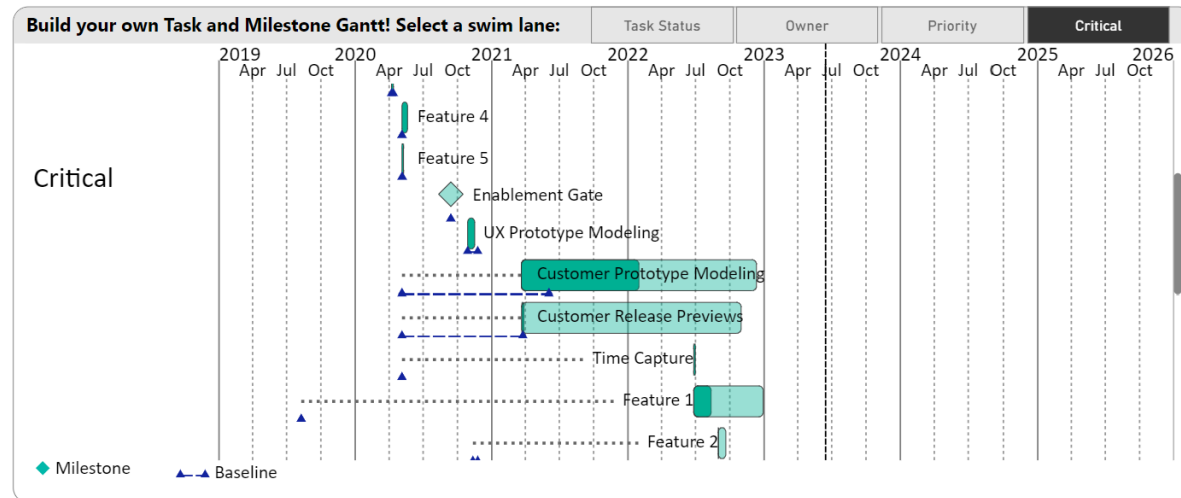
Investment Gantt



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

Overall Status	Schedule Status	Scope Status	Cost & Effort	Actual Total Cost	Capital Cost	Operating Cost
On Track	NA	Green	Green	\$67,424 (99.7%) (-\$21,103,039) vs Budget	\$36,560 (95.7%) (-\$814,724) vs Budget	\$30,864 (99.8%) (-\$20,288,316) vs Budget
Start Date	Finish Date	Baseline Start	Baseline Finish			
03-Jun-19	09-Sep-25	03-Jun-19	30-Dec-22			

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



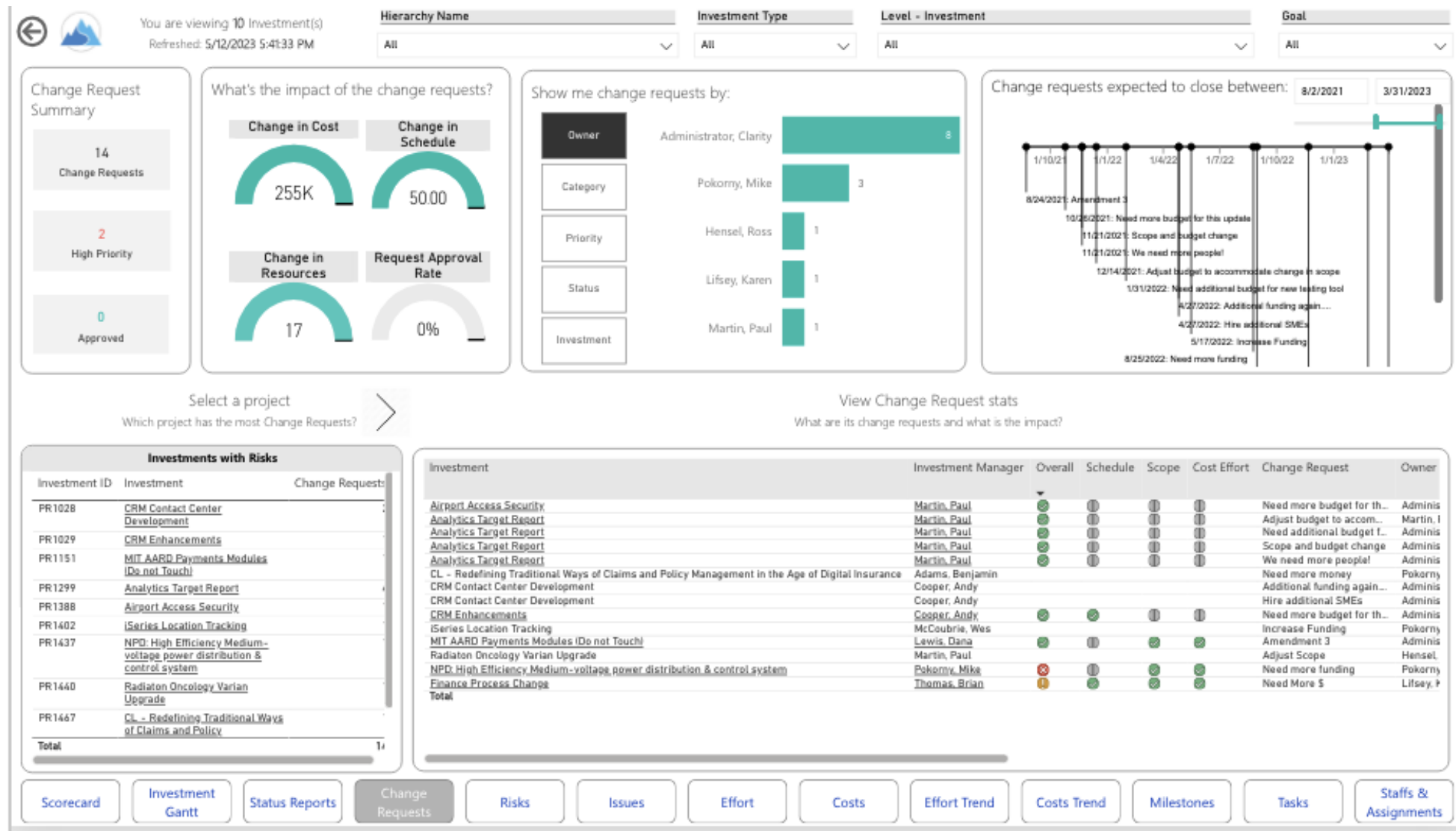
Risk	Priority	Impact	Probability	Owner	Status	Due Date
Reduced Funding could impact delivery	☆	1.00	1.00	Abbott, Karl	OPEN	5/29/2019
Dependency on other teams for DB work	☆	1.00	3.00	Abbott, Karl	OPEN	5/29/2019
Team may not be able to continue supporting this app due to resource constraints	★	3.00	3.00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

Issue	Priority	Owner	Status	Due Date	Res
Cannot execute without the Team B work being completed	☆	Administrator, Clarity	OPEN	5/30/2019	
Contractor contract ending	☆	Hazelzet, Brian	RESOLVED	12/11/2022	Com
De-prioritization due to strategic alignment shifts	☆	Administrator, Clarity	WORK IN PROGRESS	4/29/2020	

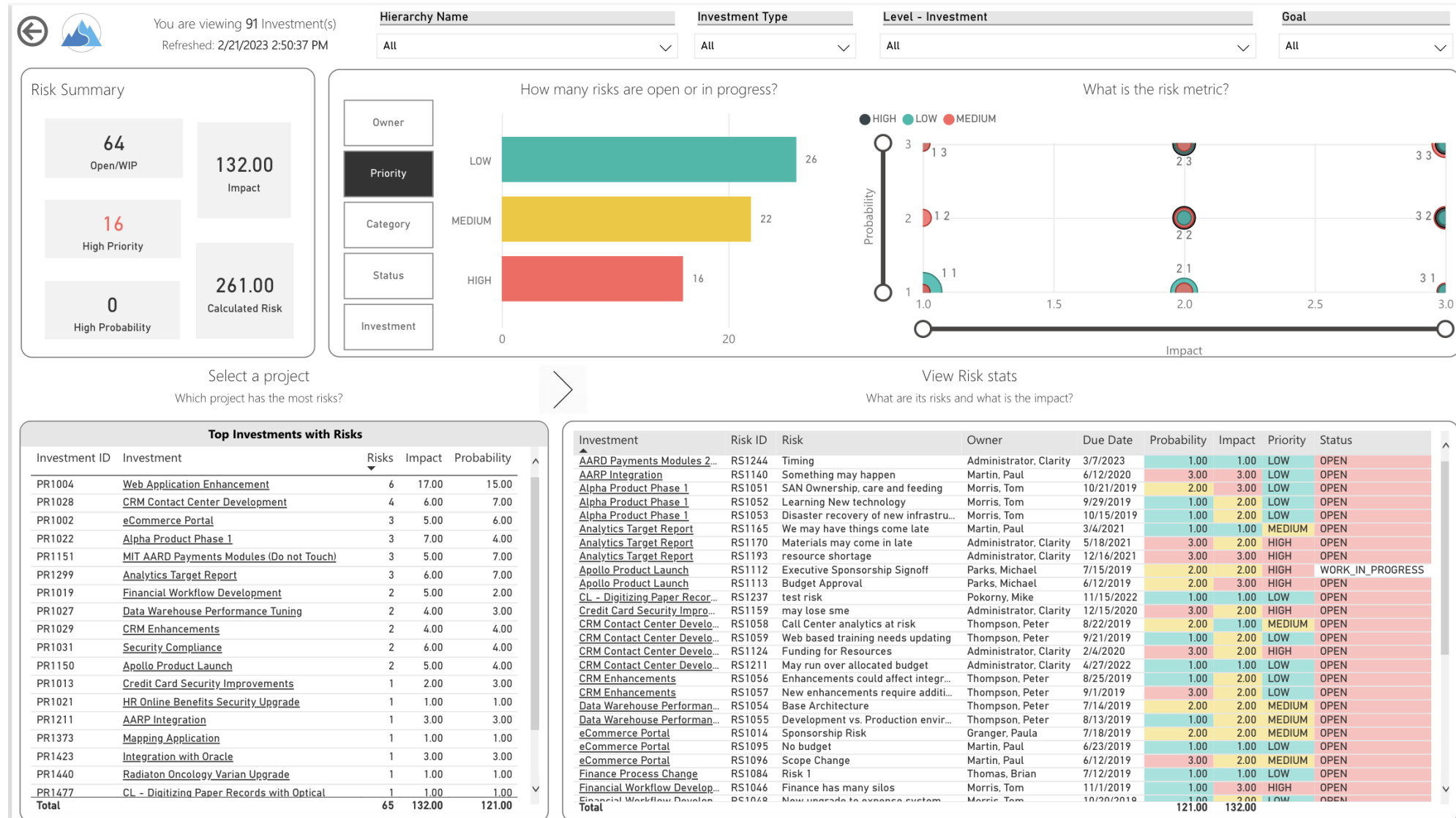
Resource Allocation												
Resource	Apr-21	Apr-22	Apr-23	Apr-24	Apr-25	Aug-20	Aug-21	Aug-22	Aug-23	Aug-24	Aug-25	Dec-2
Abbott, Karl	27.50					26.25		26.14				28
Admin, PMO	14.40	109.20	104.00	114.40	114.40	109.20	114.40	119.60	119.60	114.40	109.20	119
Admin, Rego	175.00	188.00	188.00	238.53	175.00	188.00	175.00	184.00	184.00	175.00	188.00	184
Administrator, Clarity												
Amos, Cheryl												
Total	2,209.90	1,999.20	2,304.00	2,596.93	2,534.40	2,109.45	2,094.40	2,178.94	2,649.60	2,534.40	2,419.20	2,310

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

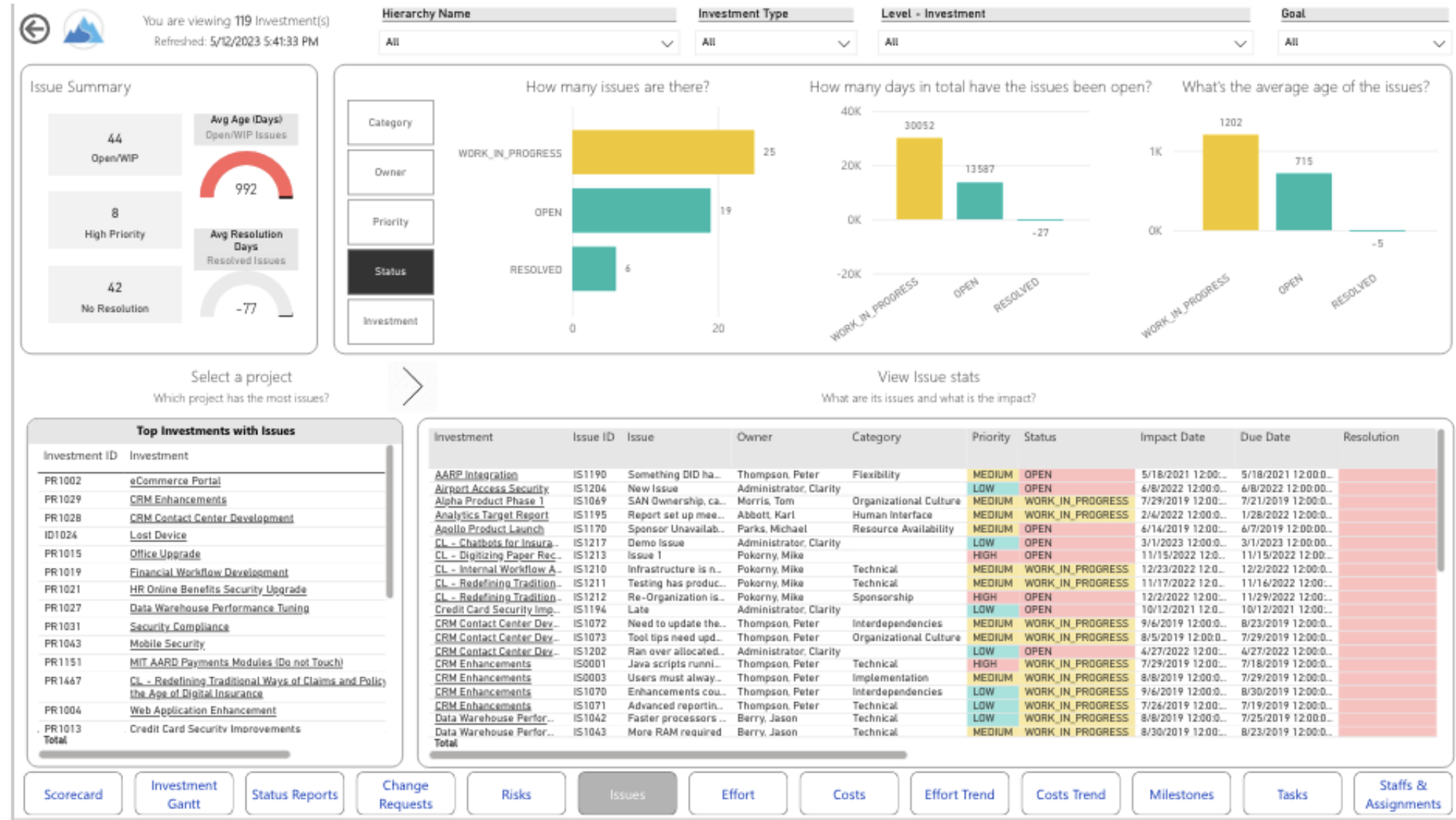
Change Requests



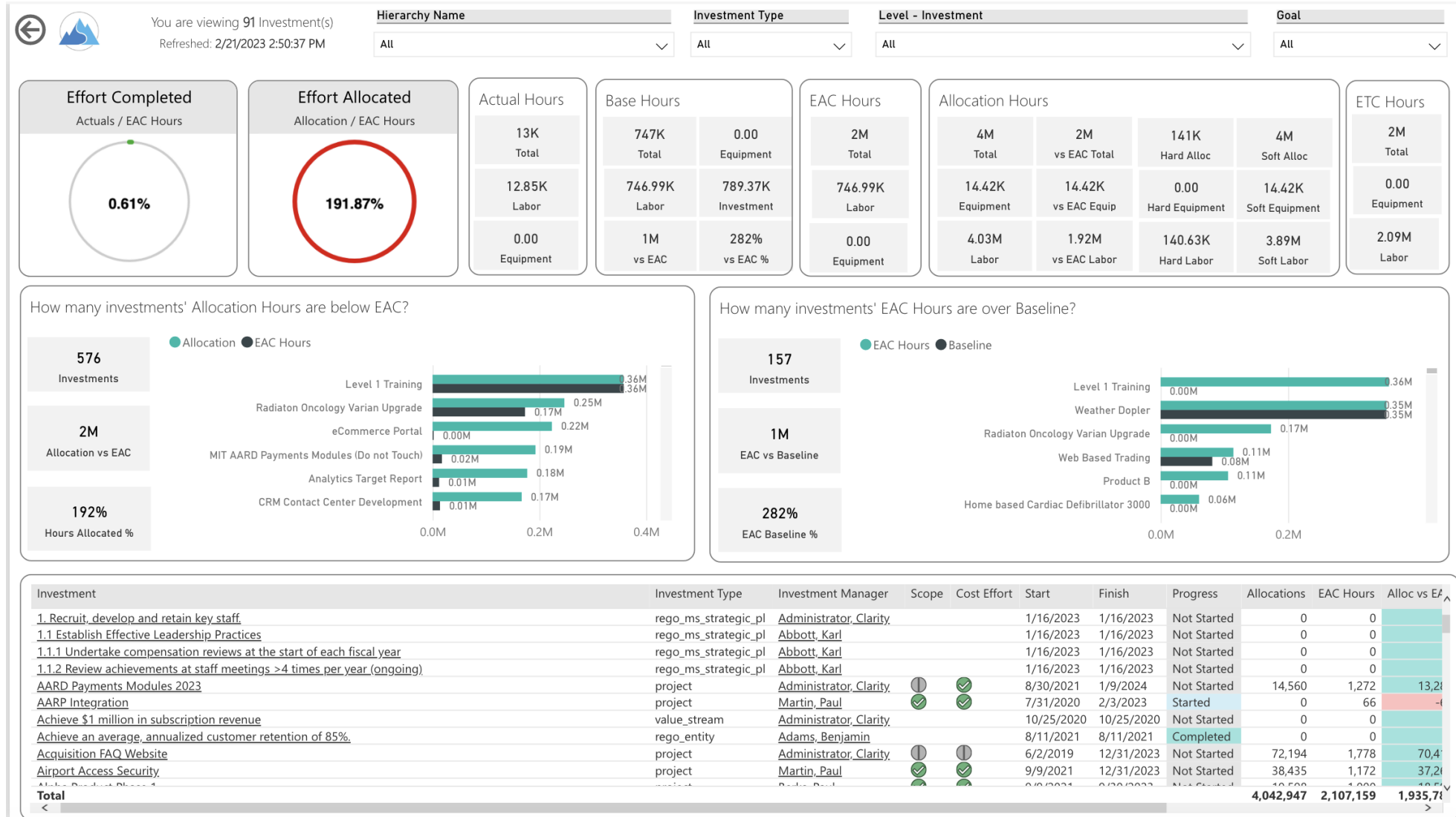
Risk Summary



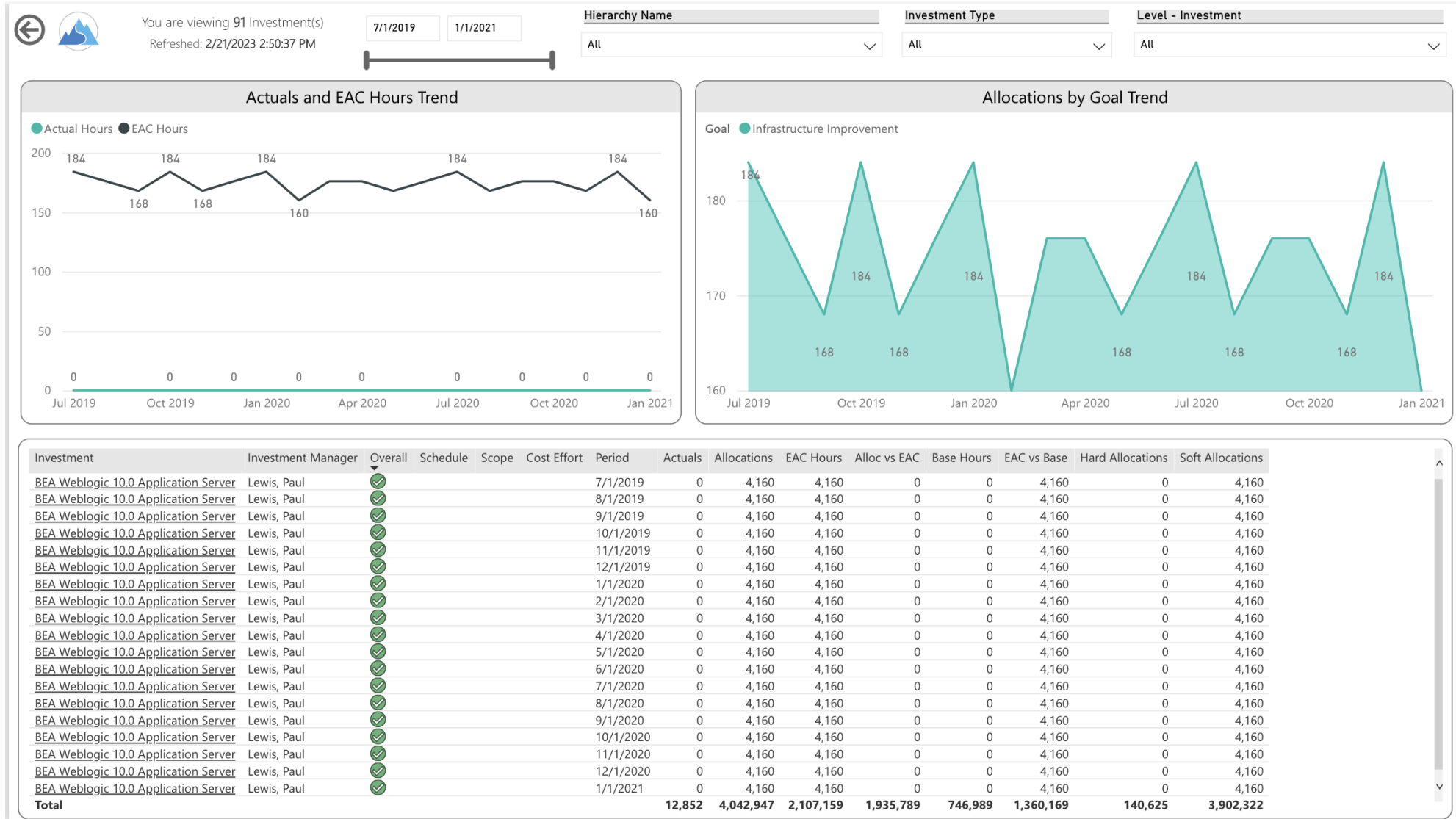
Issue Summary



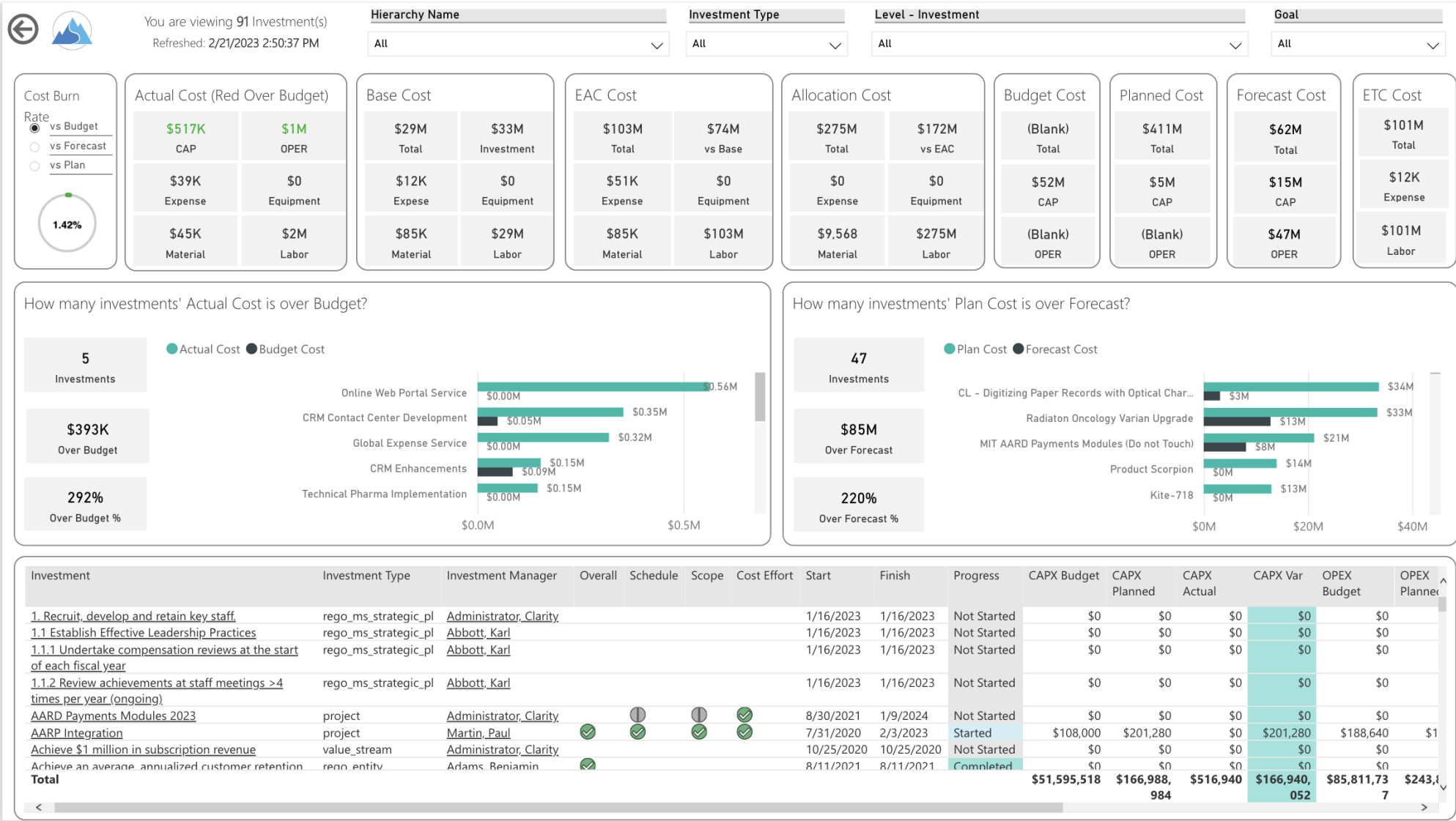
Effort



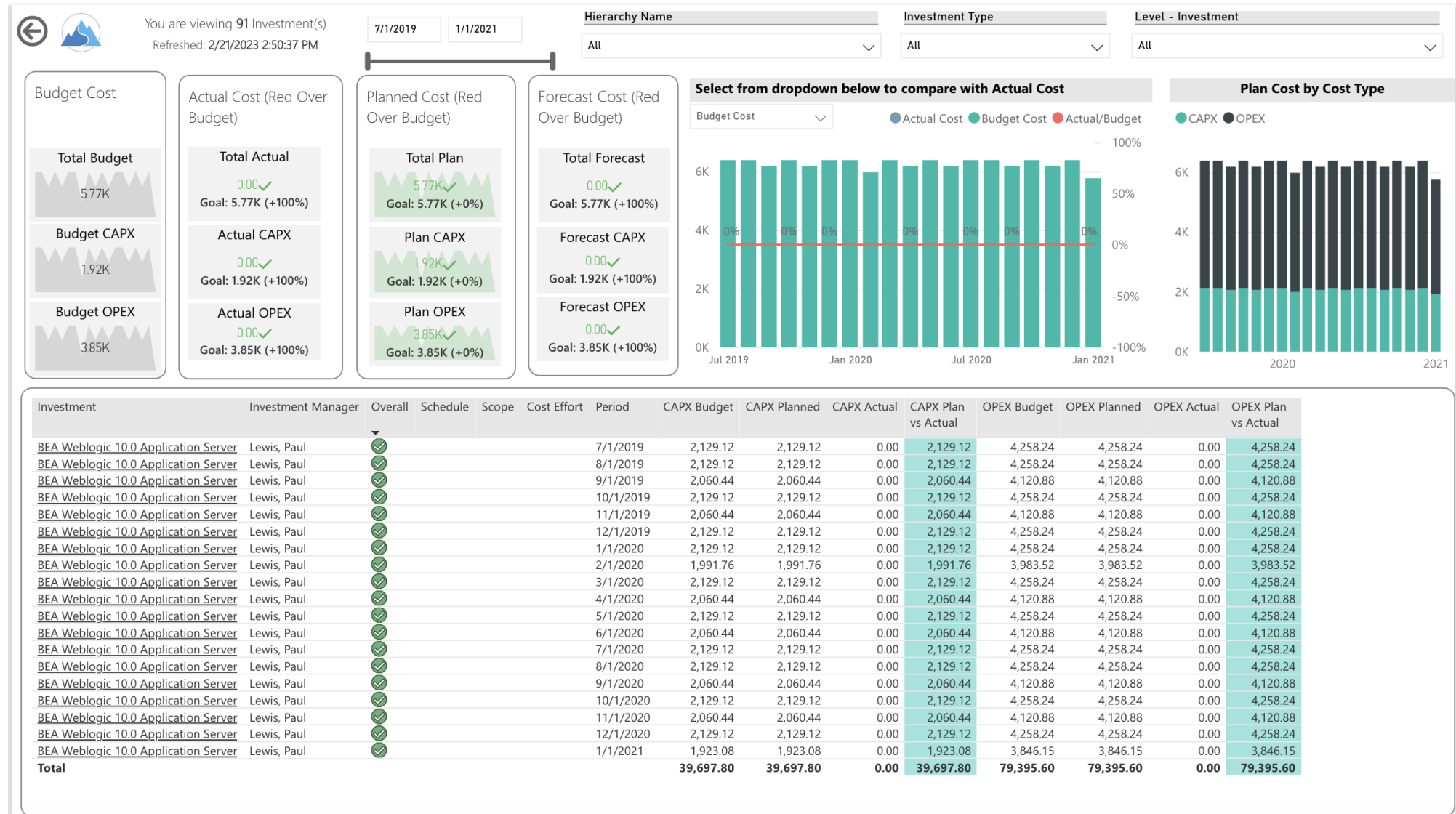
Effort Trend



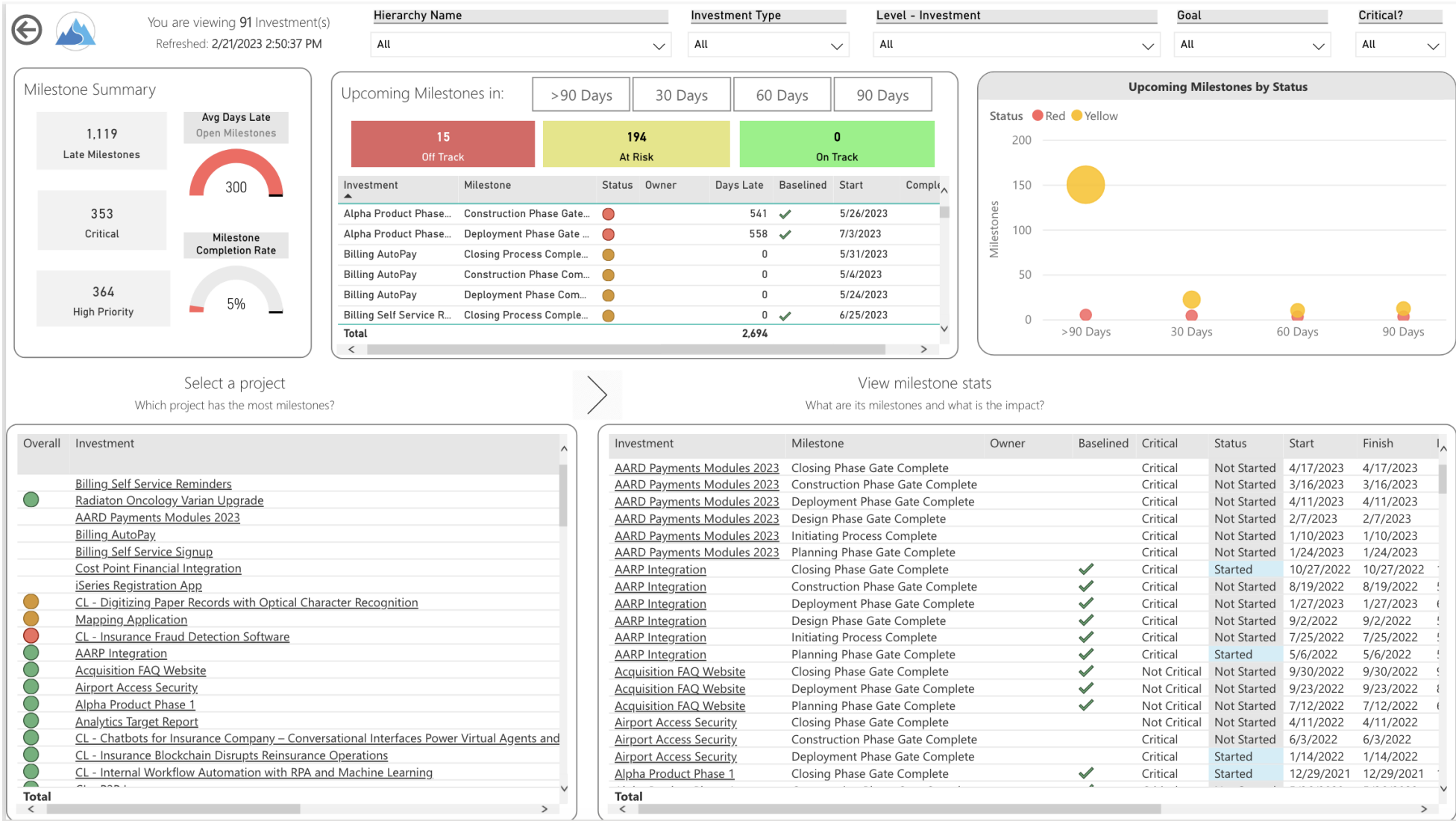
Cost



Cost Trend



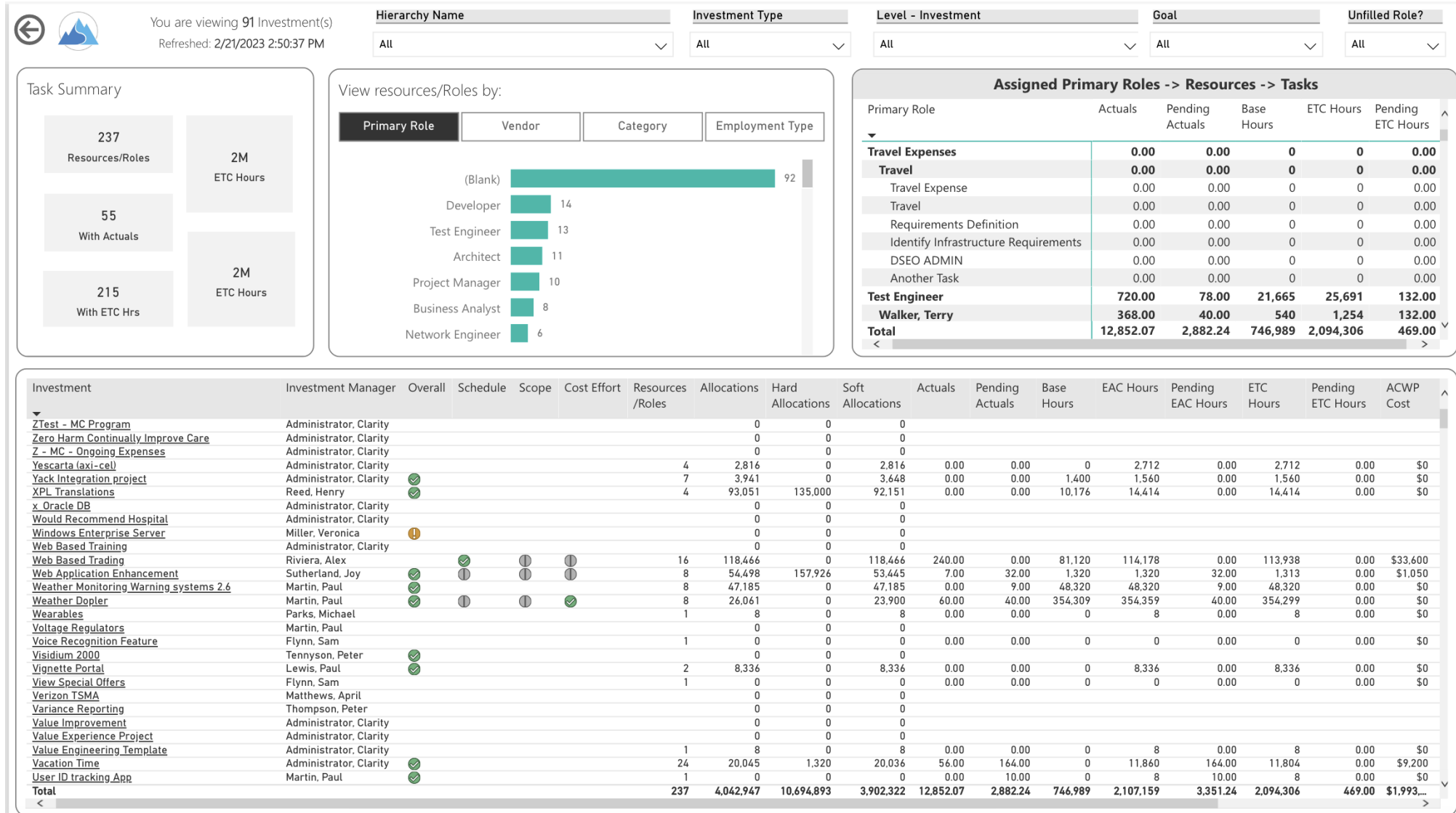
Milestones



Tasks

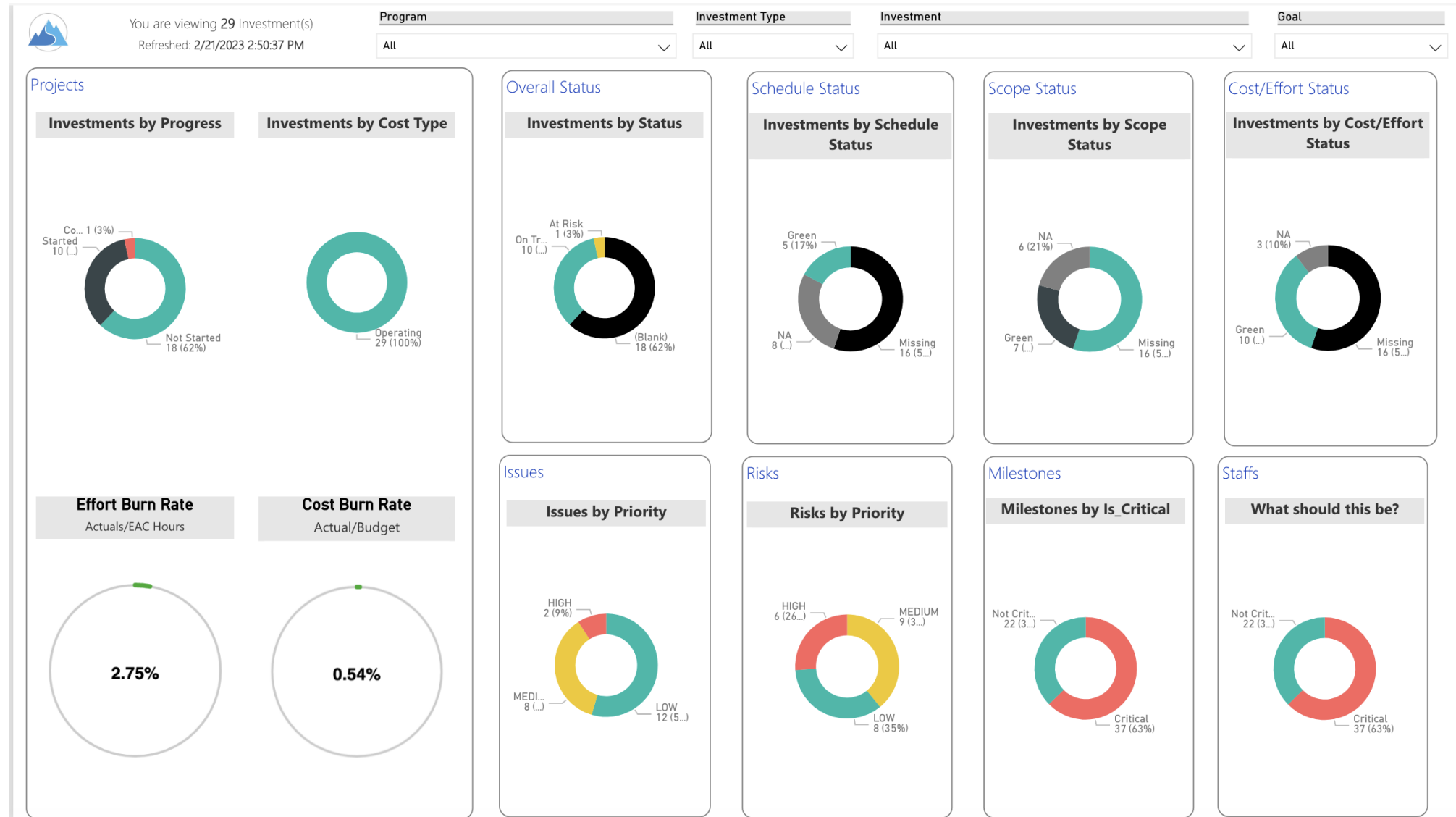
[illegible]

Staff

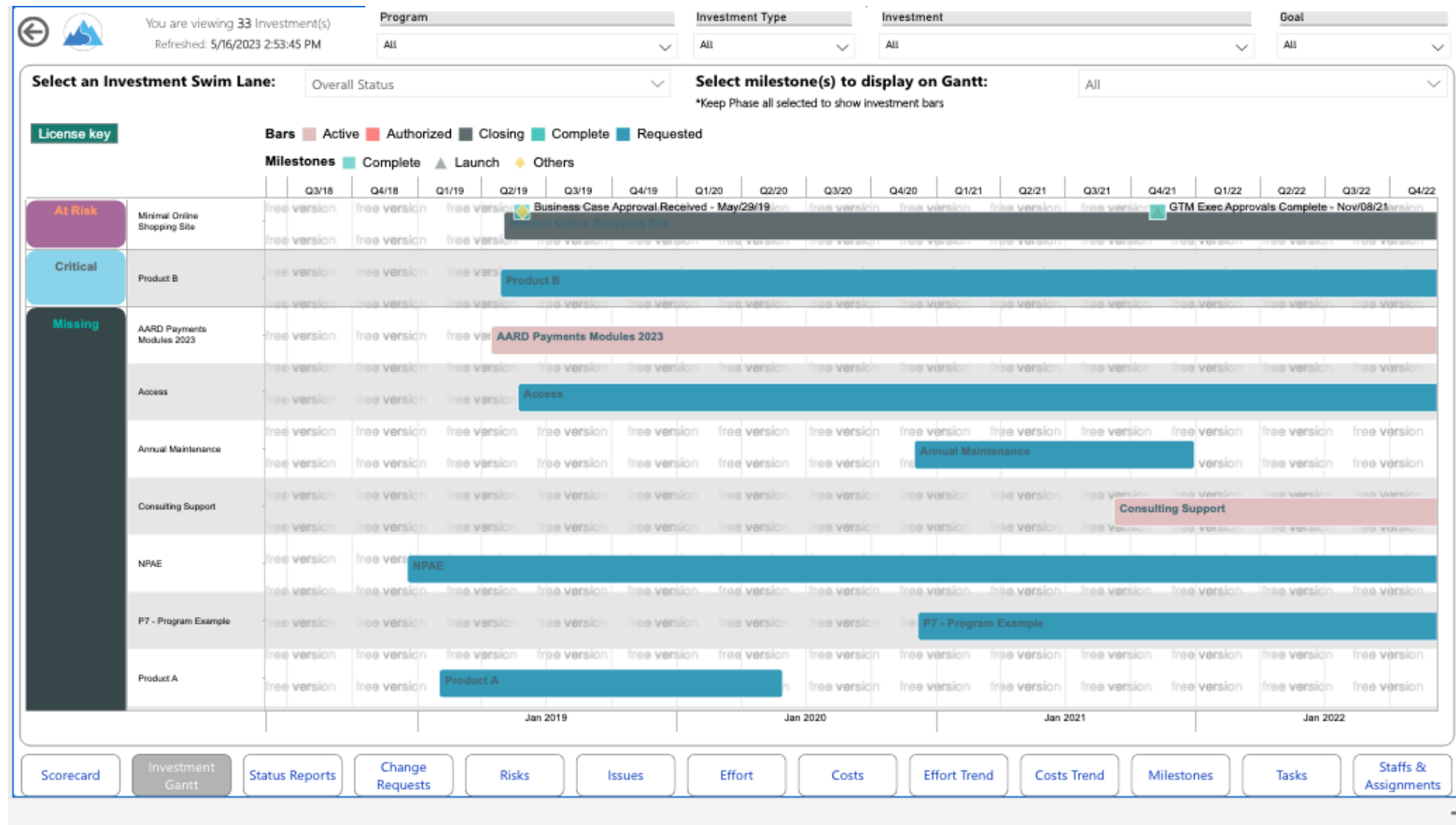


Program

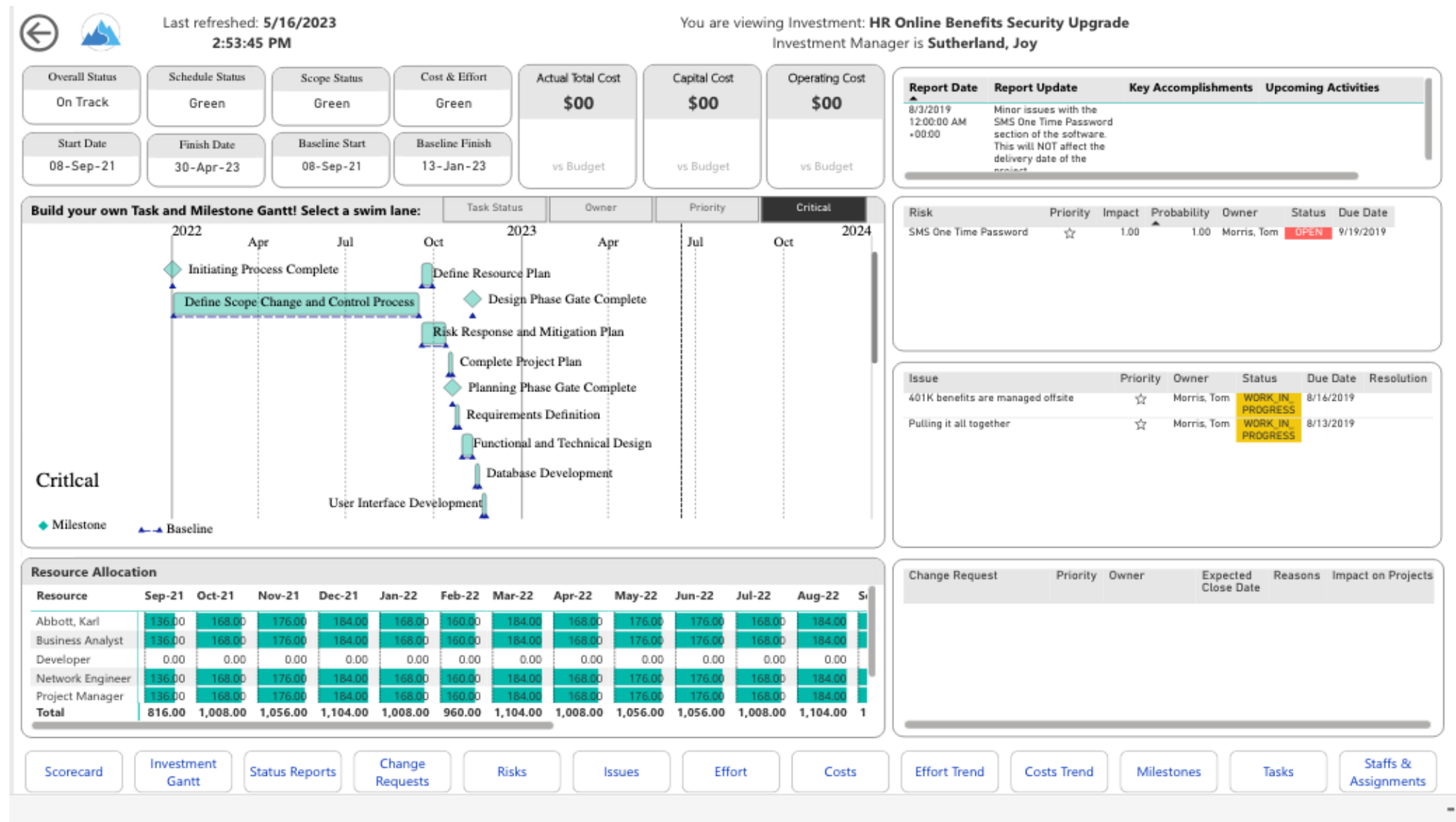
Program Summary



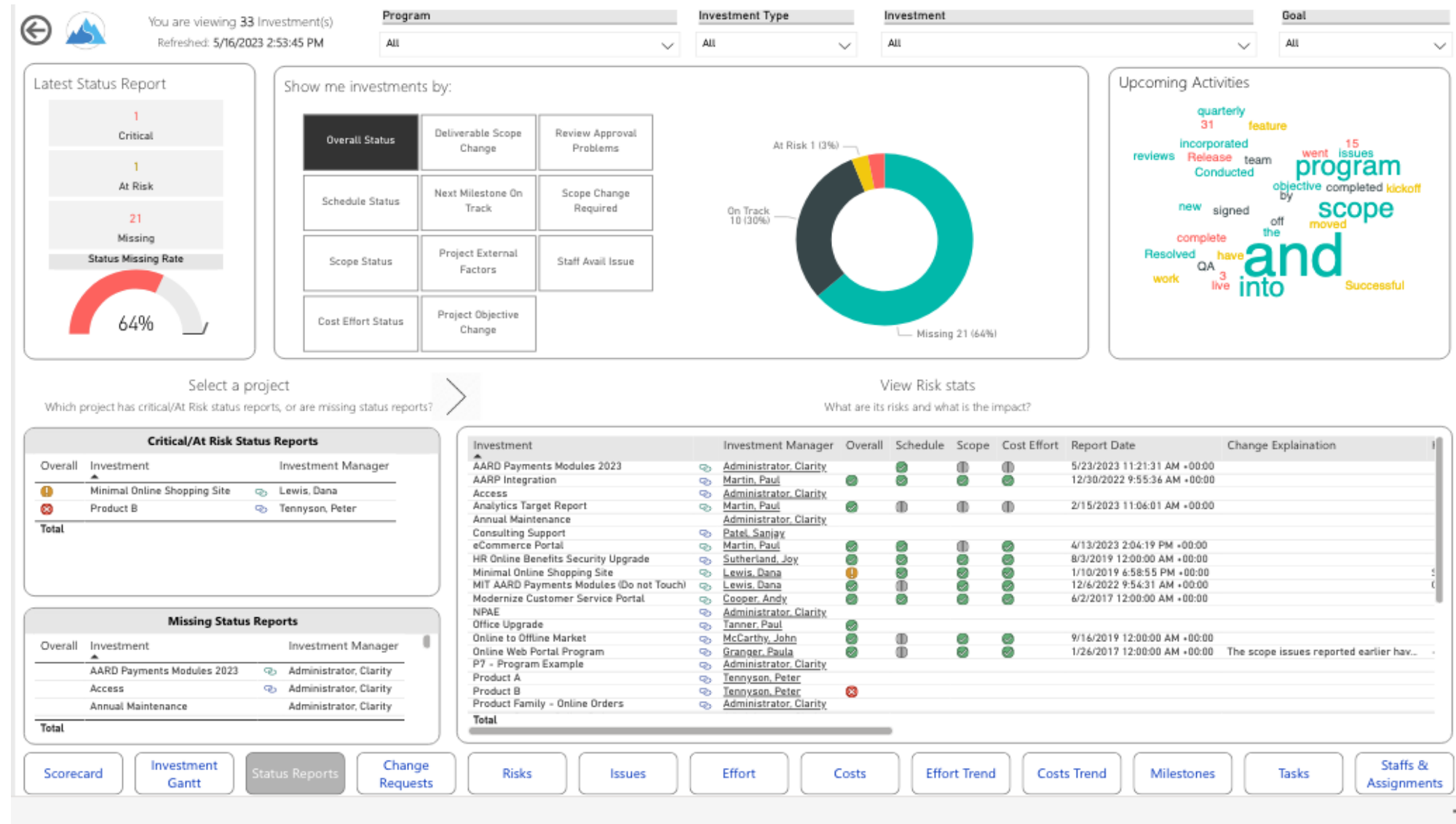
Program Gantt



Program Drill-Through



Program Status Reports



Let Rego be your guide.

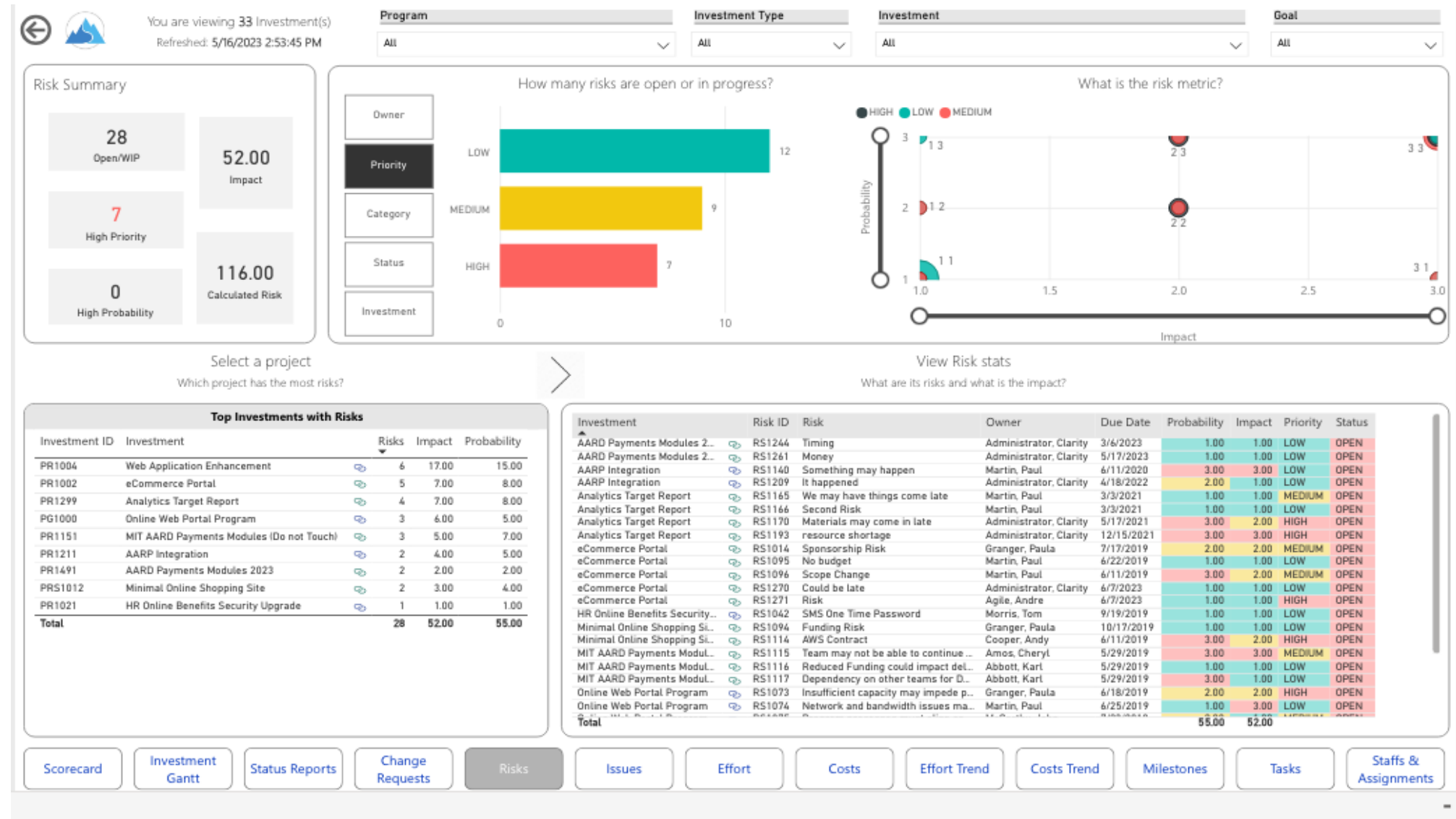
regoUniversity2026



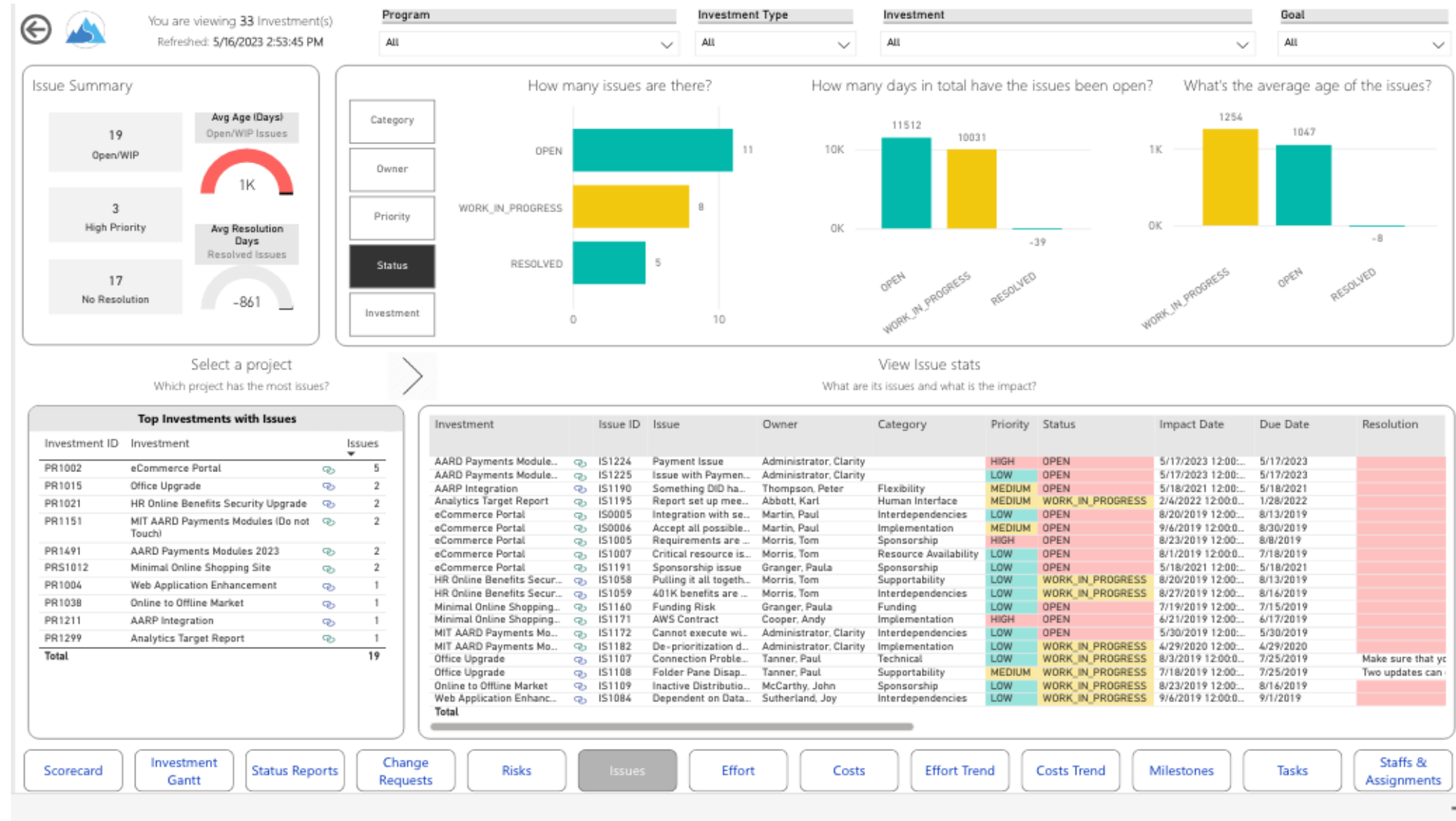
Let Rego be your guide.

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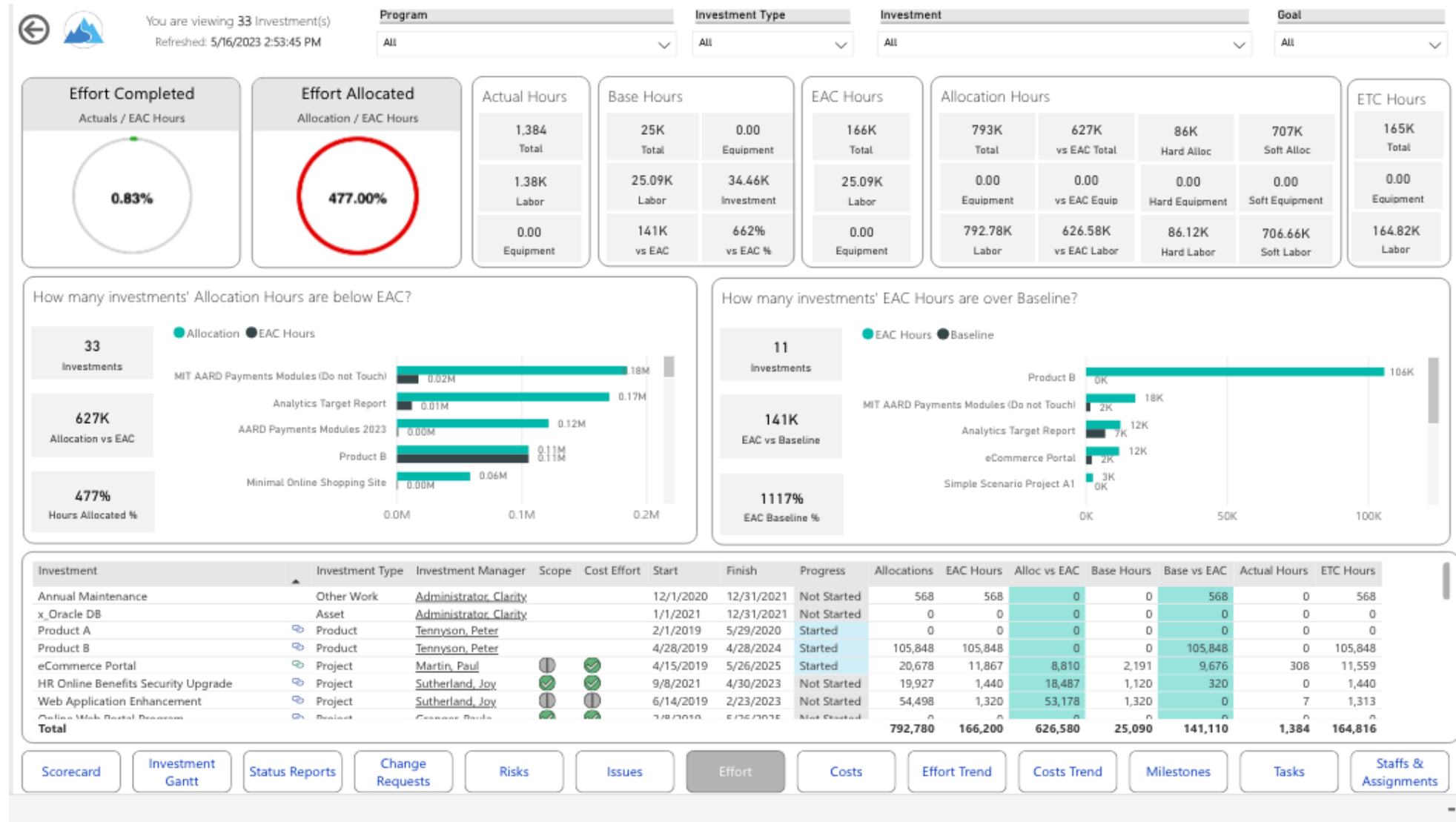
Program Risks



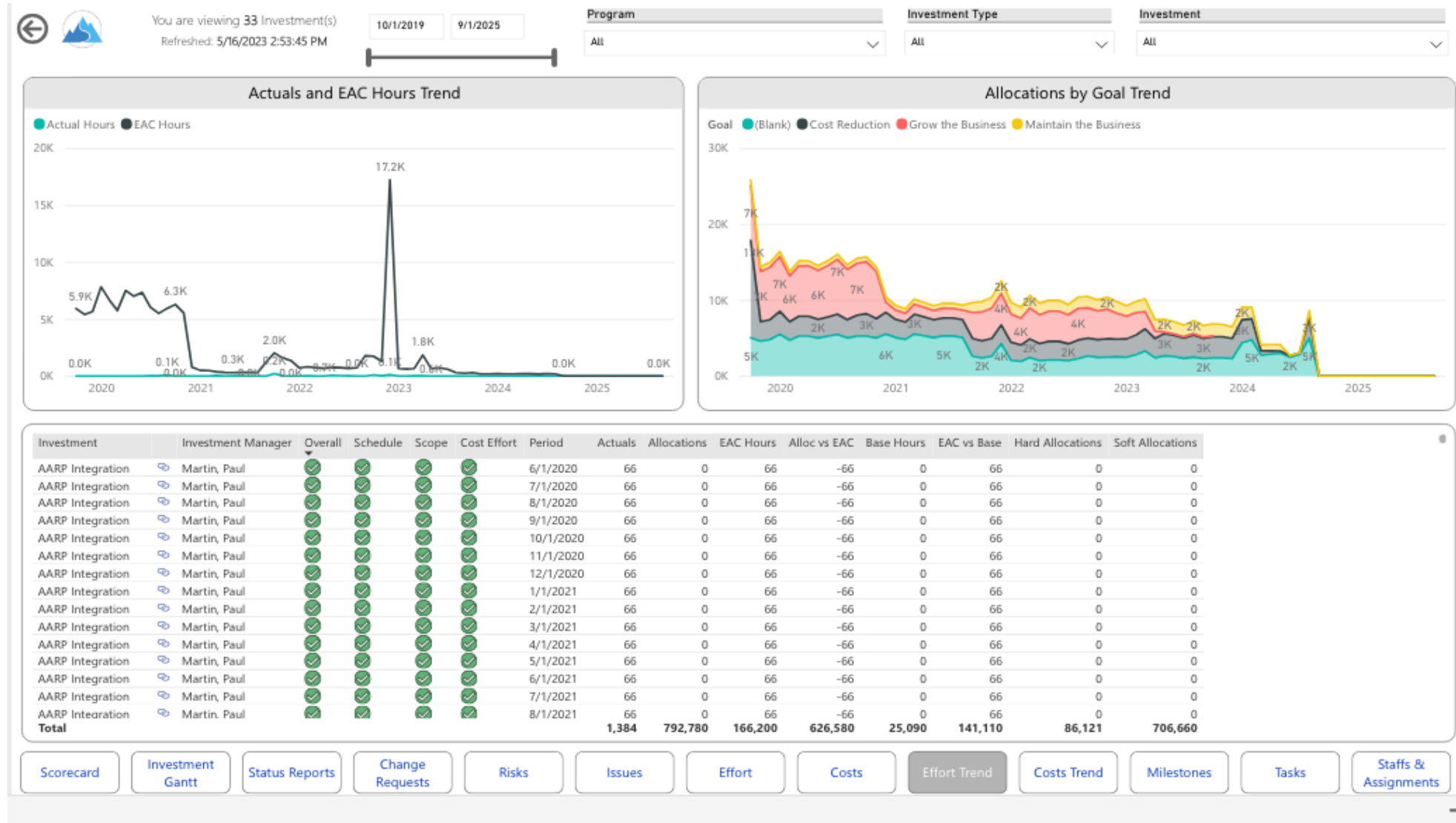
Program Issues



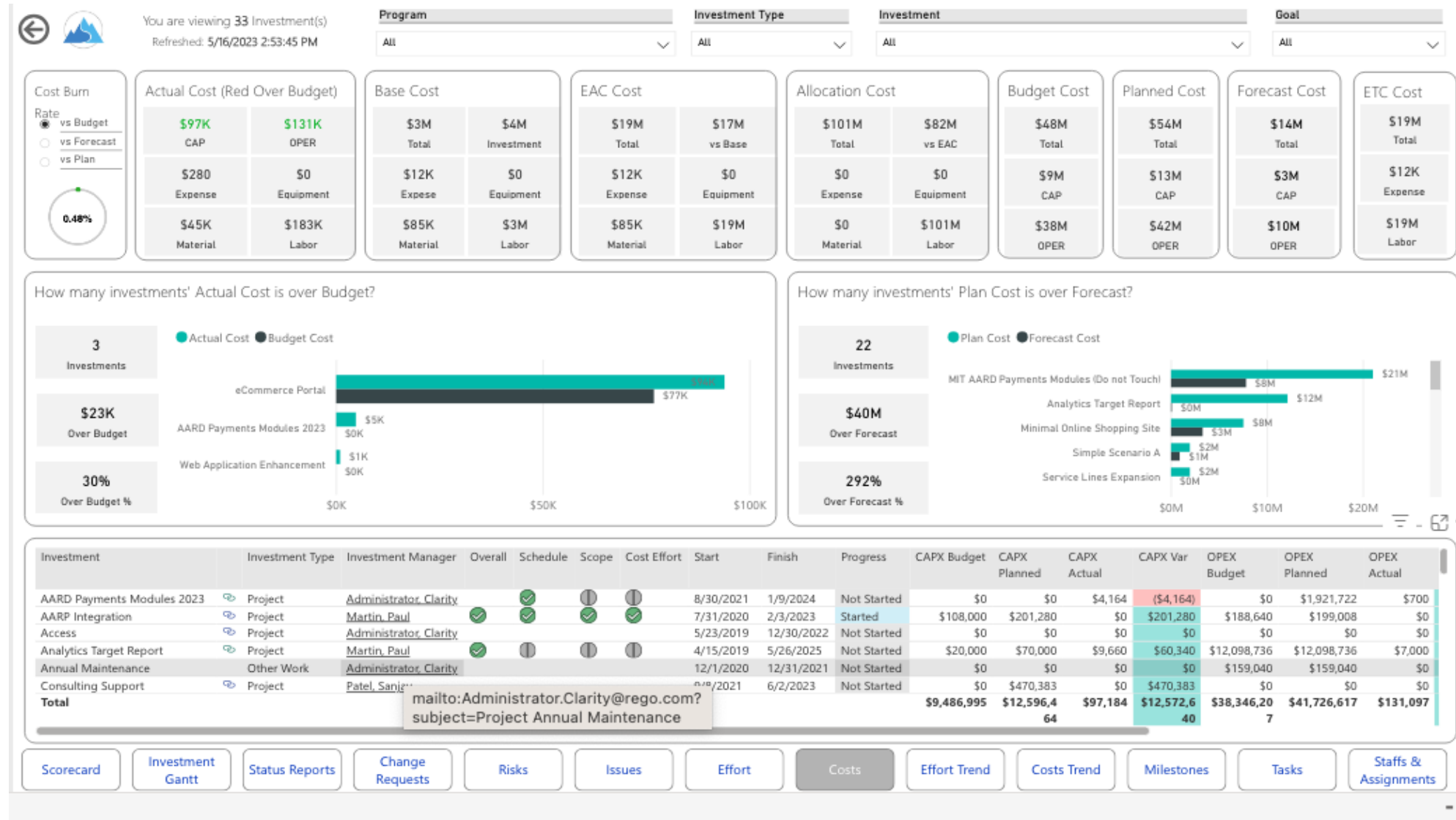
Program Effort



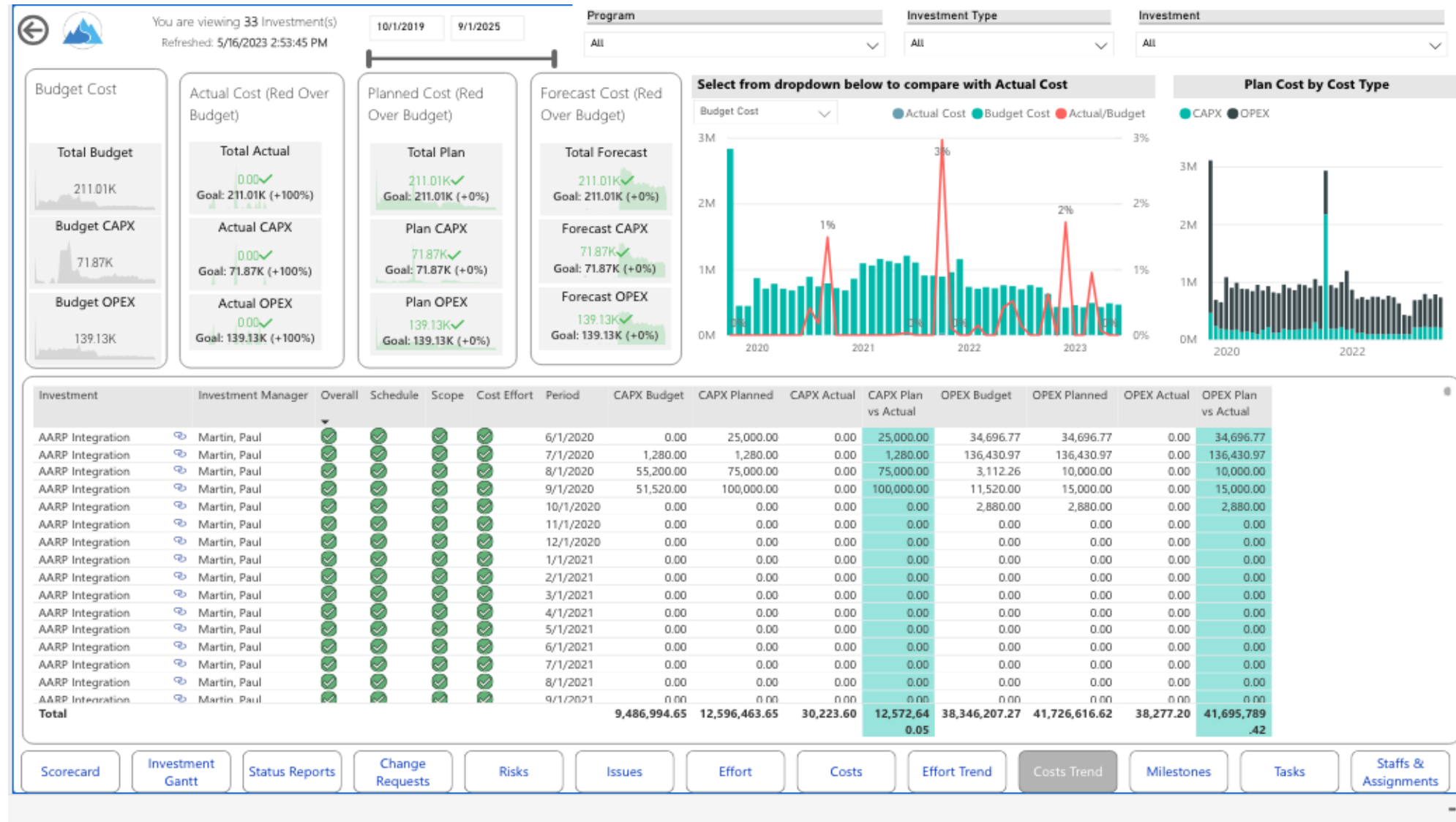
Program Effort Trend



Program Costs

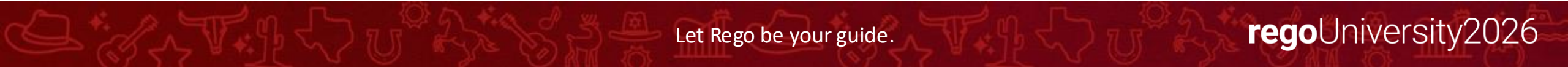


Program Costs Trend

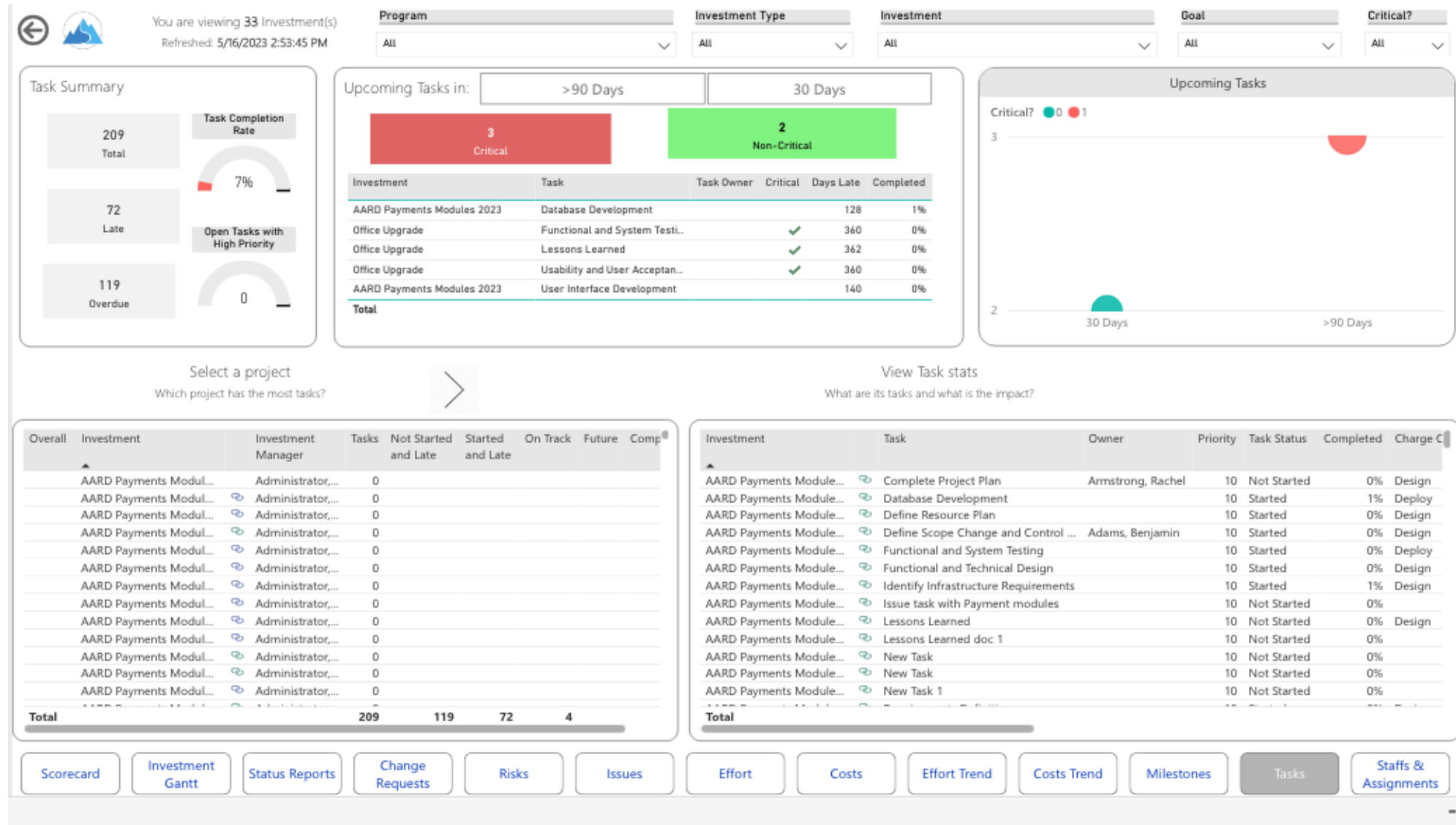


Let Rego be your guide.

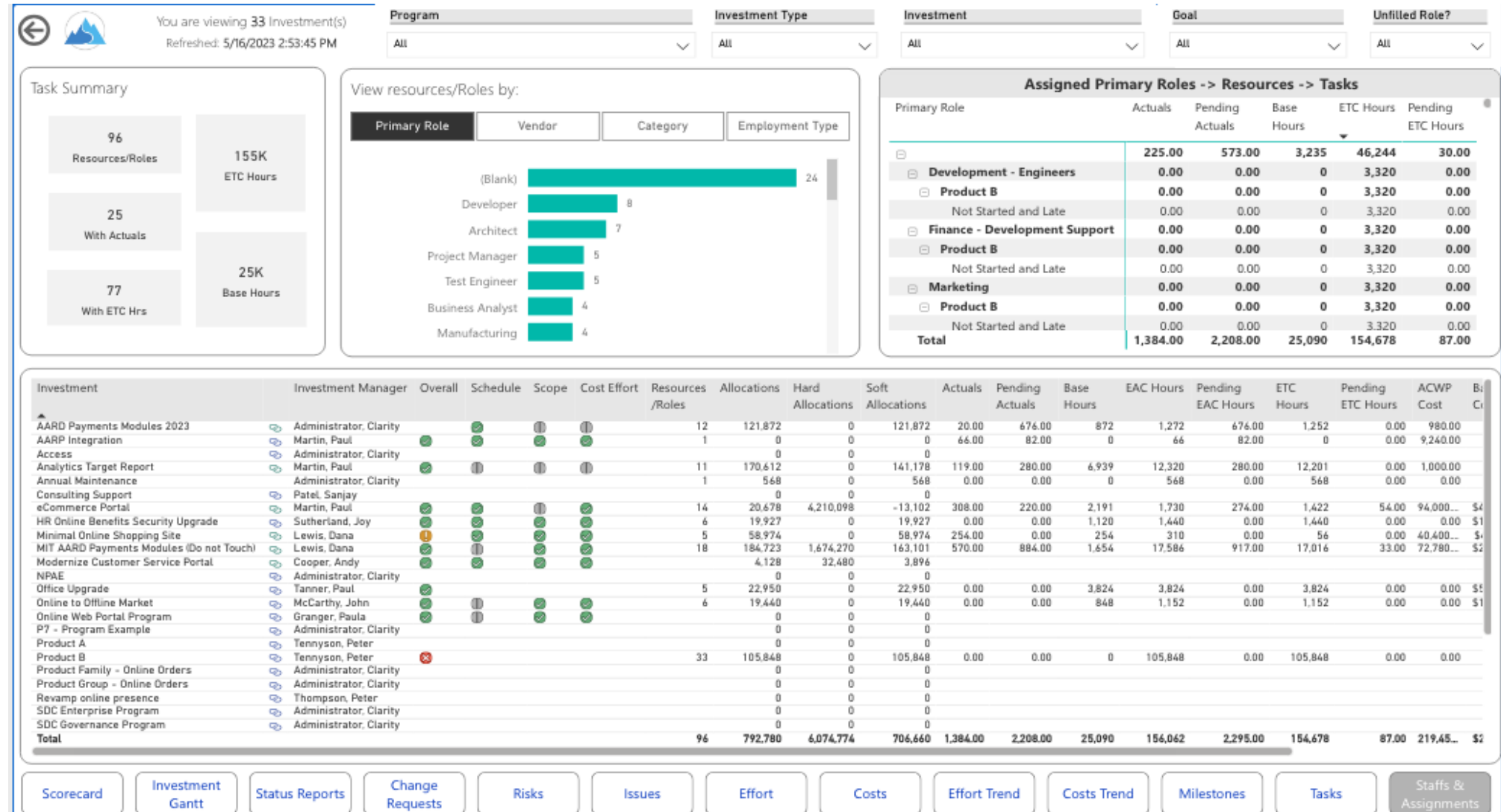
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Program Tasks

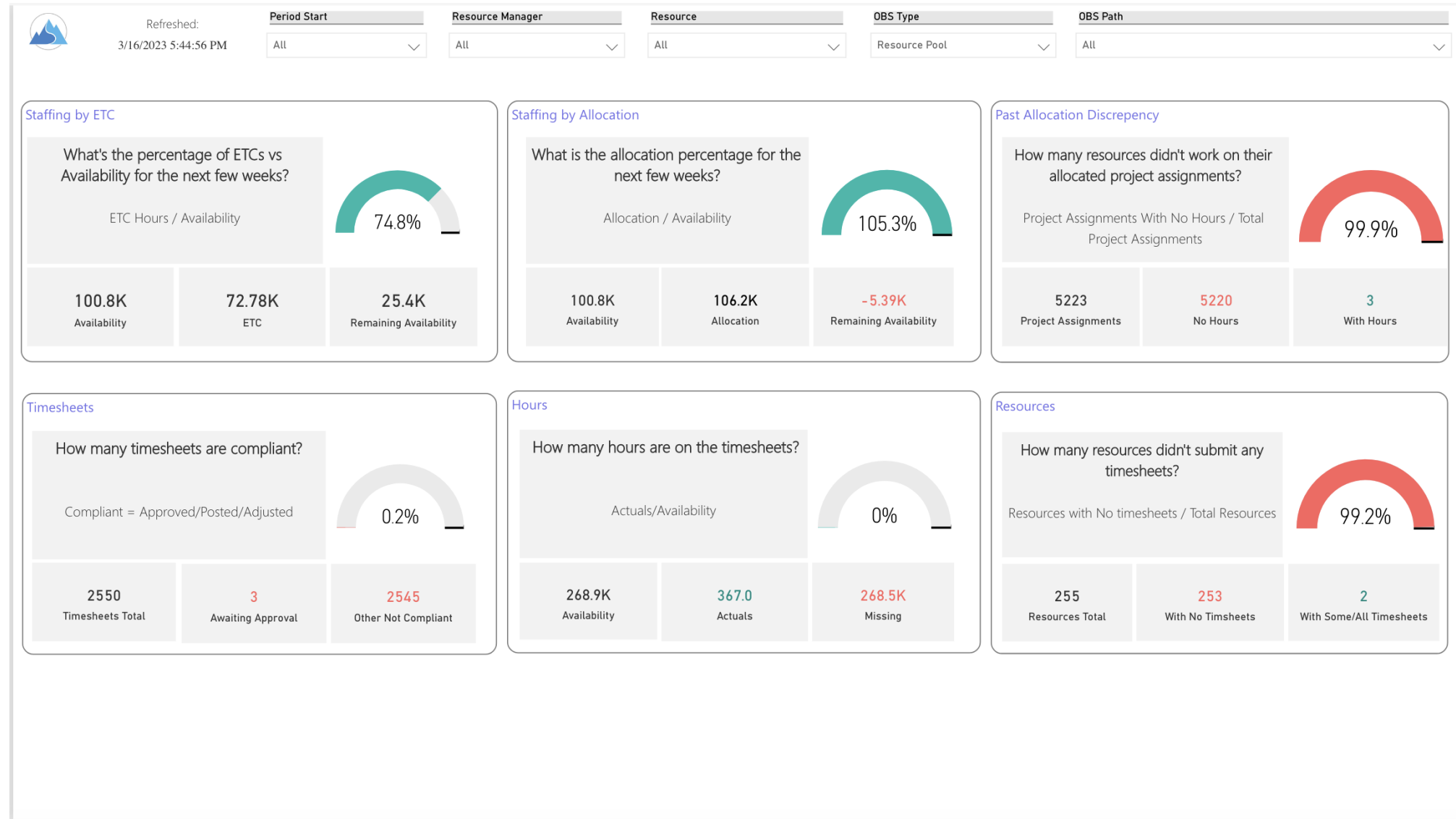


Program Staff

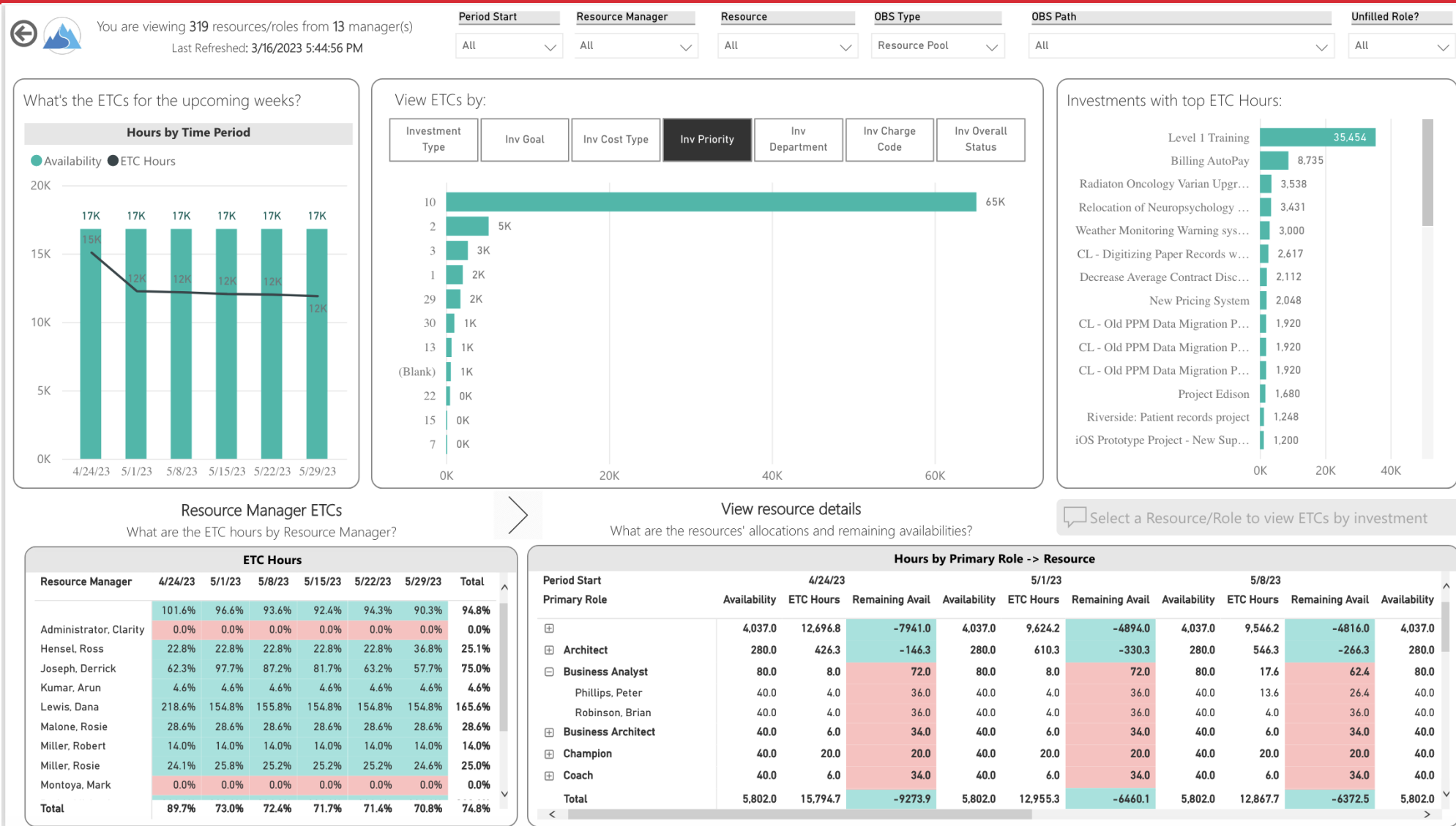


Resource

Resource Summary



Staffing Estimate to Complete (EST)



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Resource Manager

OBS Type

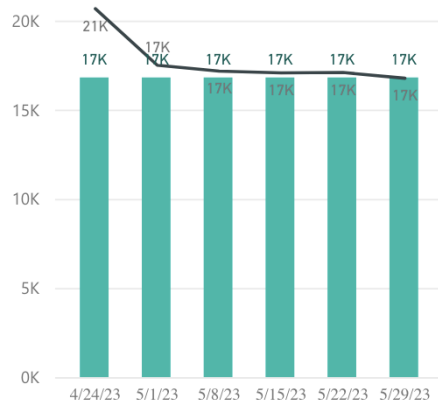
OBS Type

Unfilled Role?

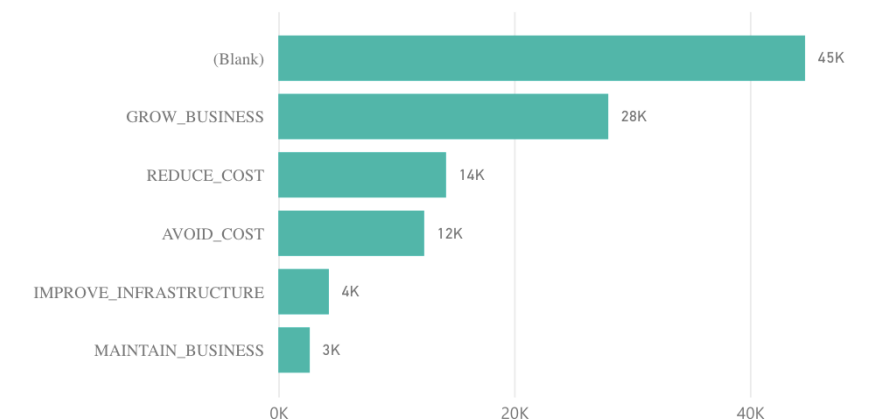
Unfilled Role?

Hours by Time Period

● Availability ● Allocation



Investment Type	Inv Goal	Inv Cost Type	Inv Priority	Inv Department	Inv Charge Code	Inv Overall Status
-----------------	----------	---------------	--------------	----------------	-----------------	--------------------



Project Name	Hours
Level 1 Training	17670
eCommerce Portal	4286
Contact Center Development	3972
Ion Oncology Varian Upgr...	3972
igitizing Paper Records w...	3840
ld PPM Data Migration P...	3677
se Average Contract Disc...	3372
Analytics Target Report	3120
er Monitoring Warning sy...	2985
System for XYZ Client	2880
ARD Payments Modules ...	2820
Project Edison	2640
XPL Translations	2424
Airport Access Security	2280

Who is not adequately allocated for the upcoming weeks?

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

What are the resources' allocations and remaining availabilities?

Hours by Primary Role -> Resource												
Period Start	4/24/23			5/1/23			5/8/23			5/15/23		
Primary Role	Availability	Allocation	Remaining	Availability	Allocation	Remaining	Availability	Allocation	Remaining	Availability	Allocation	Remaining
⊕	4,997.0	15,807.76	-10,810.76	4,997.0	12,621.76	-7,624.76	4,997.0	12,285.76	-7,288.76	4,997.0	12,189.76	-7,192.76
⊖ Account Manager	80.0	92.00	-12.00	80.0	92.00	-12.00	80.0	92.00	-12.00	80.0	92.00	-12.00
Armstrong, Rachel	40.0	52.00	-12.00	40.0	52.00	-12.00	40.0	52.00	-12.00	40.0	52.00	-12.00
Phillips, Steven	40.0	40.00	0.00	40.0	40.00	0.00	40.0	40.00	0.00	40.0	40.00	0.00
⊕ Architect	440.0	820.10	-380.10	440.0	820.10	-380.10	440.0	820.10	-380.10	440.0	820.10	-380.10
⊕ Architect PS	120.0	80.00	40.00	120.0	80.00	40.00	120.0	80.00	40.00	120.0	80.00	40.00
⊕ Business Analyst	220.0	240.00	-20.00	220.0	240.00	-20.00	220.0	240.00	-20.00	220.0	240.00	-20.00
⊕ Business Architect	40.0	46.00	-6.00	40.0	46.00	-6.00	40.0	46.00	-6.00	40.0	46.00	-6.00
Total	8,907.0	20,664.86	-11,757.86	8,907.0	17,495.71	-8,588.71	8,907.0	17,159.71	-8,252.71	8,907.0	17,063.71	-8,156.71
<	>											

Select a Resource to view allocation by investment

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All

All All

Resource Pool

All

All

-142.25K

Act vs Alloc

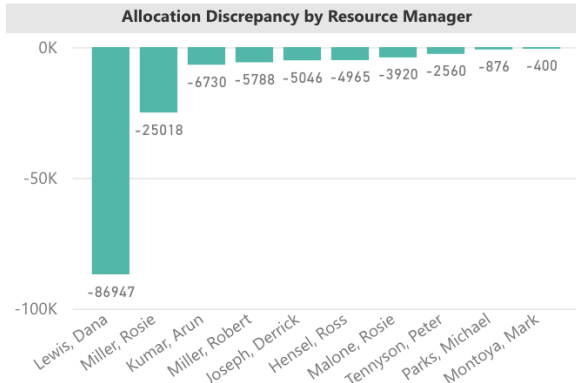
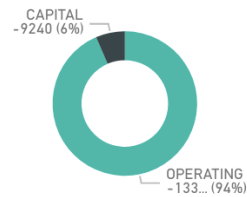
142.59K

Allocation

339.00

Actuals

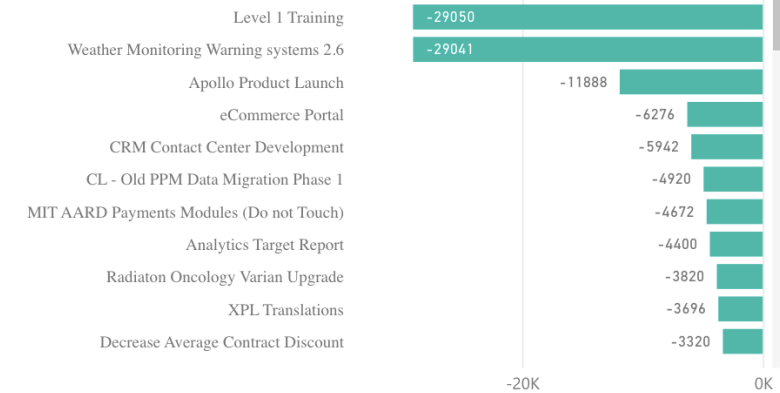
Allocation Discrepancy by Resource Manager



Investment

Resource

Allocation Discrepancy



Select a Manager to view detail

☐ Select a Resource to view detail

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

Resource Detail



Resource Skills



Resource Tasks

You are viewing 255 resources from 13 manager(s)

Last Refreshed: 3/16/2023 5:44:56 PM

Period Start

Resource Manager

Resource

OBS Type

OBS Path

All

All

All

Resource Pool

All

Where are resources entering hours to?

4 Investments

3 Projects

1 Non Projects

1 Critical/At Risk

4 Tasks

0 Milestone

1 Critical

1 Late

Show:

Actuals

Investments

Tasks

By:

Investment Type

Inv Goal

Inv Cost Type

Inv Priority

Inv Department

Inv Charge Code

Inv Overall Status

GROW_BUSINESS

(Blank)

MAINTAIN_BUSINESS

320

37

10

Top consuming Investments & Tasks (Red = Critical Task)

Investment

Task

Feature A

AS Services

NS1B

Weather Monitoring Warning sys...

320

28

10

9

Select a manager

Which manager has the most actuals to the projects & tasks?

View Project & Task details

Who entered hours to those projects & tasks?

Actuals by Manager -> Resource

Miller, Rosie

Lewis, Dana

358

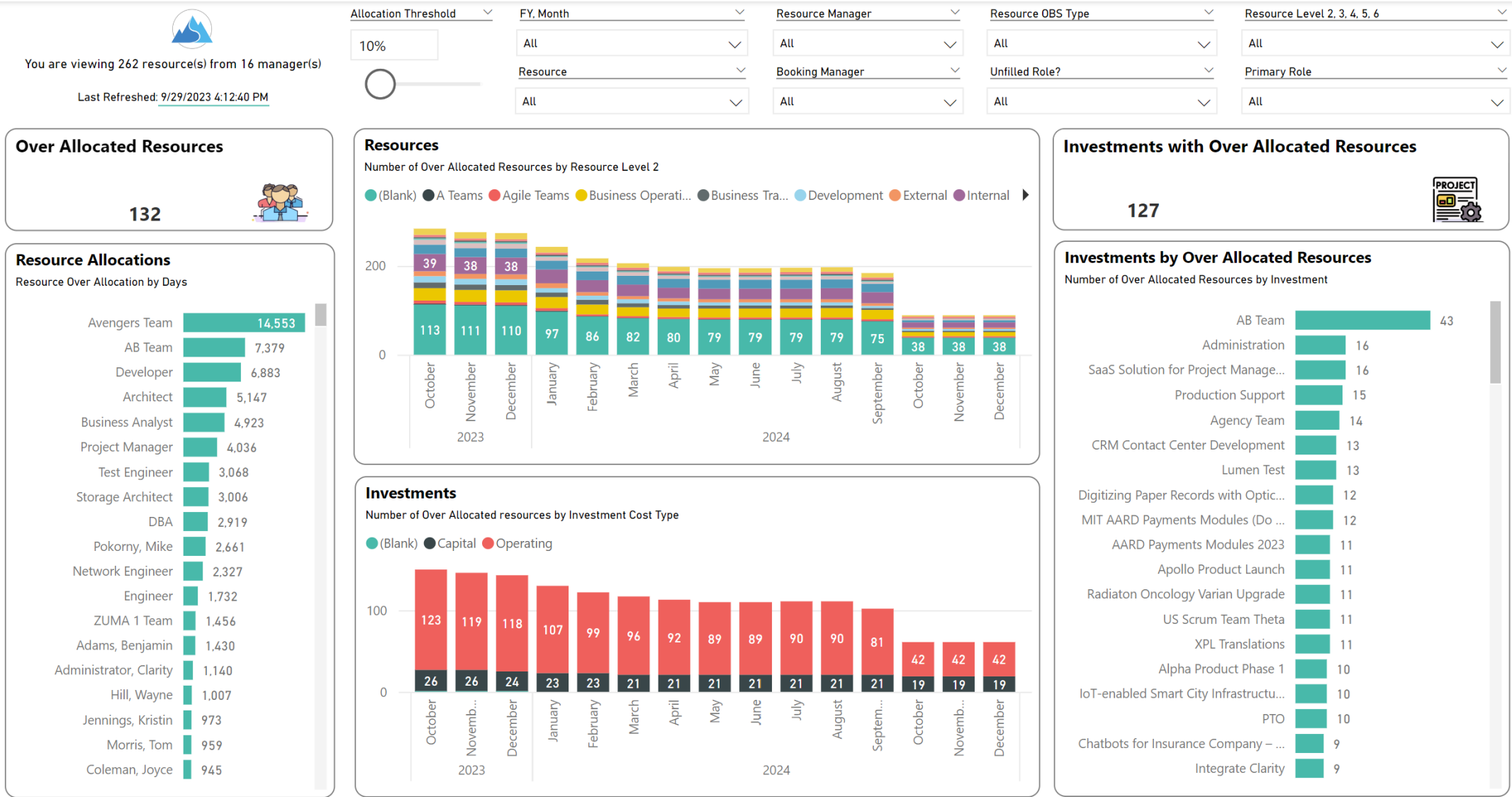
9

Hours by Week nd Investment -> Task -> Resource

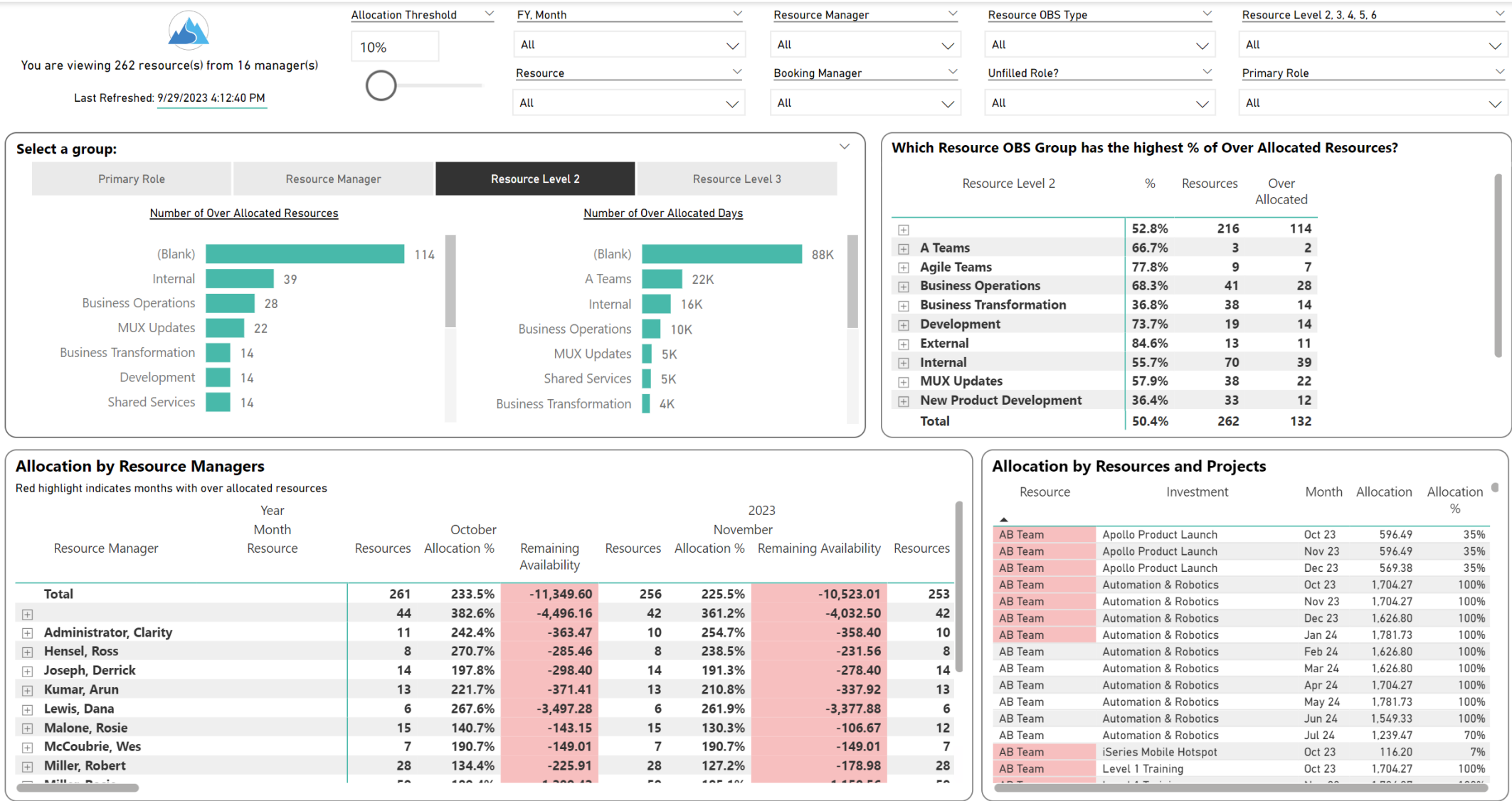
Investment	1/23/23	1/30/23	2/6/23	2/13/23	2/20/23	2/27/23	3/6/23	3/13/23	3/20/23	3/27/23
AS Services	28									
iSeries Location Tracking							320			
Technical Architecture	10	0	0	0	0	0	0	0	0	0
Weather Monitoring Warning systems 2.6	9	0	0	0	0	0	0	0	0	0
Total	47	0	0	0	0	0	320	0	0	0

Resource Allocation Planning

Overallocated Resources



Resource Allocation by Person



Resource Allocation by Project



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

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Allocation Thresho... 10%

FY, Month All

Resource Manag... All

Resource OBS Type All

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

Unfilled ... All

Primary Role All

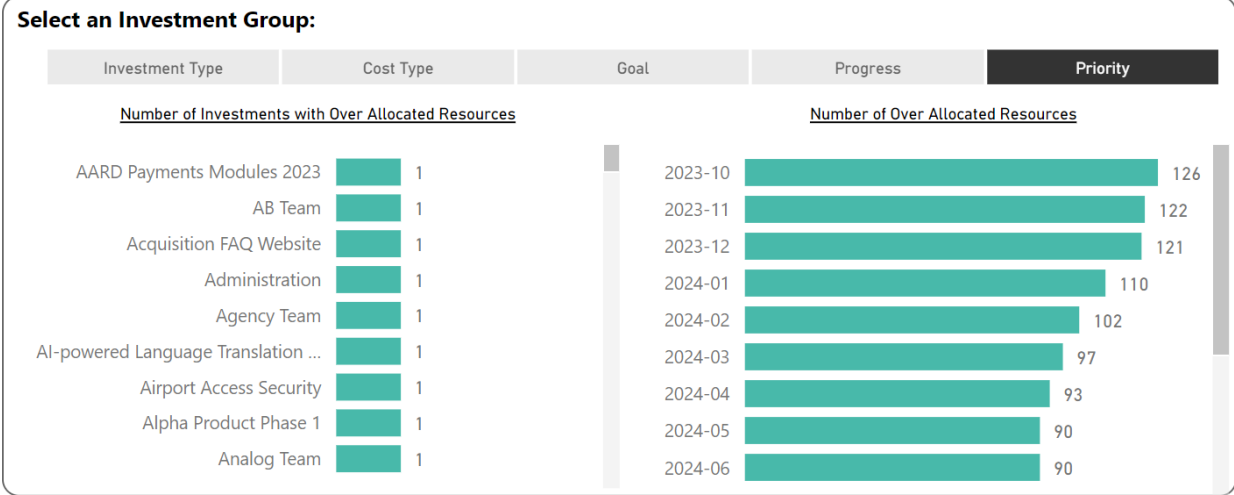
Investment Mana... All

Investment OBS Type All

Investment OBS 2, OBS_LEVEL3 All

Type All

Investment All



What's the monthly trend?

% Resource Over Allocated

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

What are the investments with over allocated resources?

Red highlight indicates the months Resources are Over Allocated in

Investment	Year	Month	Resource	2023	2023	2023	2023	2024	2024	2024	2024	2024	2024	2024	2024	2024	2024	2024
				October	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources	Allocation	Resources
AARD Payments Modules 2023	1			6	23.47	5	23.47	4	78.44	9	268.63	9	342.76	9	342.76	9	359.08	9
AB Team	43			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			4	93.87	4	93.87	4	89.60	6	128.80	6	117.60	6	117.60	6	5.60	
Administration	16			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			14	328.53	14	328.53	14	313.60	14	343.47	14	313.60	14	313.60	14	328.53	14
AI-powered Language Translation Tool for International Teams	5			5	105.60	5	105.60	5	100.80	5	110.40	5	91.20					
Airport Access Security	1			1	13.33	1	6.67	1	6.67									
Alpha Product Phase 1	10			10	132.82													

Project Resource Details



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

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

Allocation Thresho...
10%

FY, Month
All

Resource Manag...
All

Resource OBS Type
All

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

Unfilled ...
All

Primary Role
All

Investment Mana...
All

Investment OBS Type
All

Investment OBS 2, 3
All

Type
All

Investment
All

Resource Stats

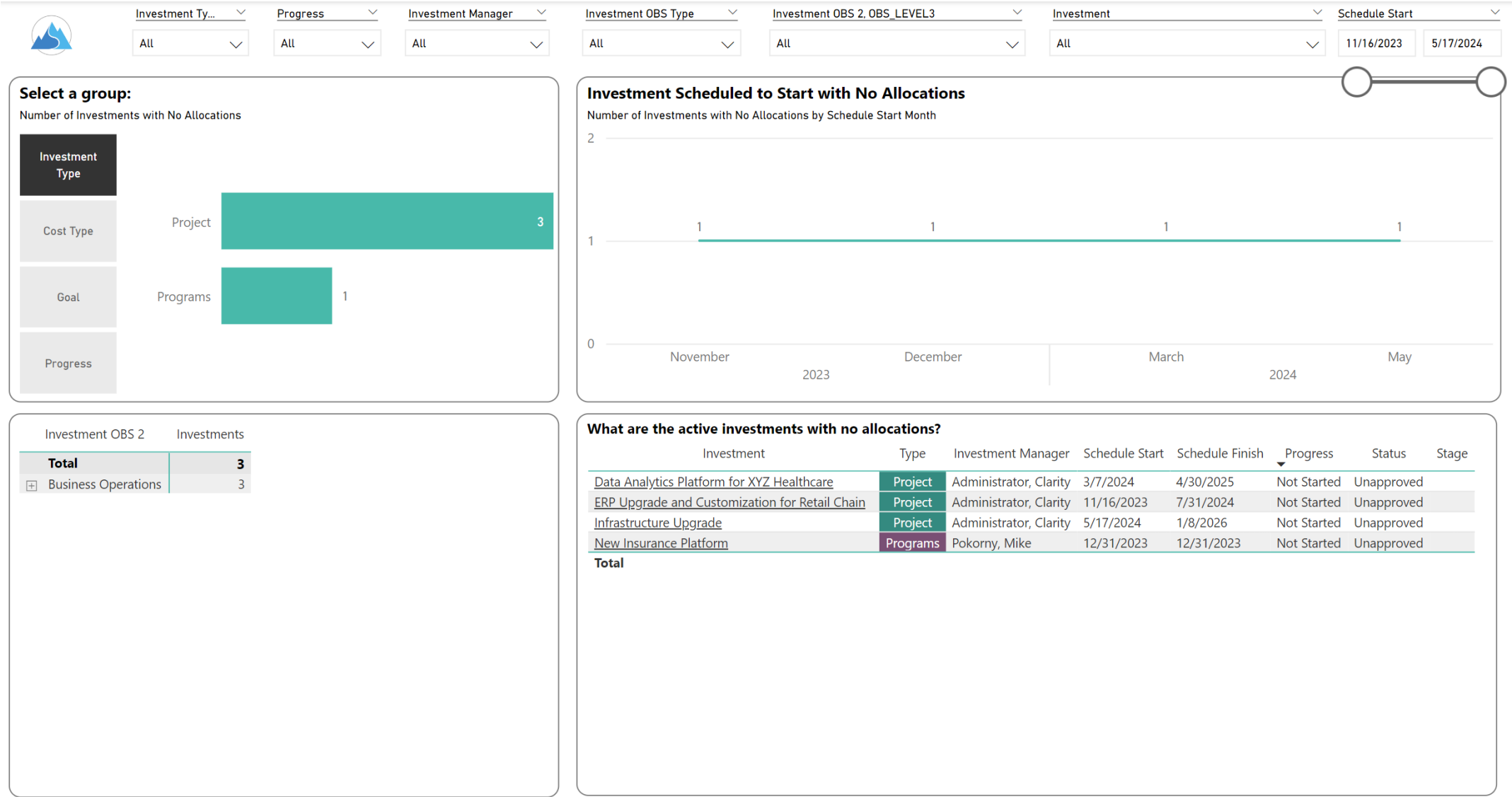
Resource	Month	Investments	Availibility	Allocation	Allocation %	Allocation Status
AB Team	Oct 23	6	1,704.3	4,121.2	241.8%	Over Allocated
AB Team	Nov 23	4	1,704.3	4,005.0	235.0%	Over Allocated
AB Team	Dec 23	4	1,626.8	3,823.0	235.0%	Over Allocated
AB Team	Jan 24	3	1,781.7	2,246.5	126.1%	Over Allocated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

Investment Stats

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

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

Projects Without Resource Allocations



Resources Without Allocations



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

FY, Period

FY 2024

Resource Manager

All

Resource OBS Type

Financial Department OBS

Resource Level 2, 3, 4, 5, 6

All

Resource

All

Booking Manager

All

Unfilled Role?

All

Primary Role

Multiple selections

Select a group:

Primary Role

Resource Manager

Resource Level 2

Resource Level 3

Number of Assigned Resources with no Allocations

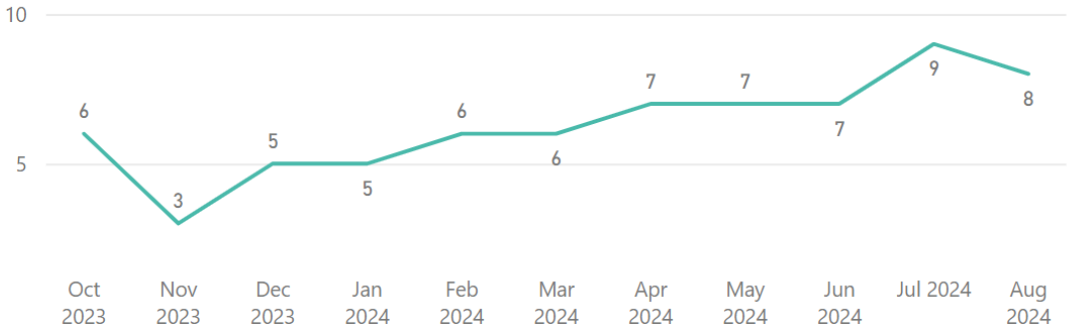
Developer - Développeur(e)	3
Manager - Gestionnaire	2
Business Analyst - Analyste...	1
Database Administrator - A...	1
Electrical Specialist - Spéci...	1

Availability for Assigned Resources with no Allocations

Business Analyst - Analyste d'a...	169.0
Database Administrator - Adm...	126.0
Developer - Développeur(e)	294.0
Electrical Specialist - Spécialist...	167.0
Engineering Specialist - Spécial...	41.0

Assigned Resources with No Allocations

Number of Assigned Resources with no allocations



Resource Level 2 Not Allocated % Resources Not Allocated

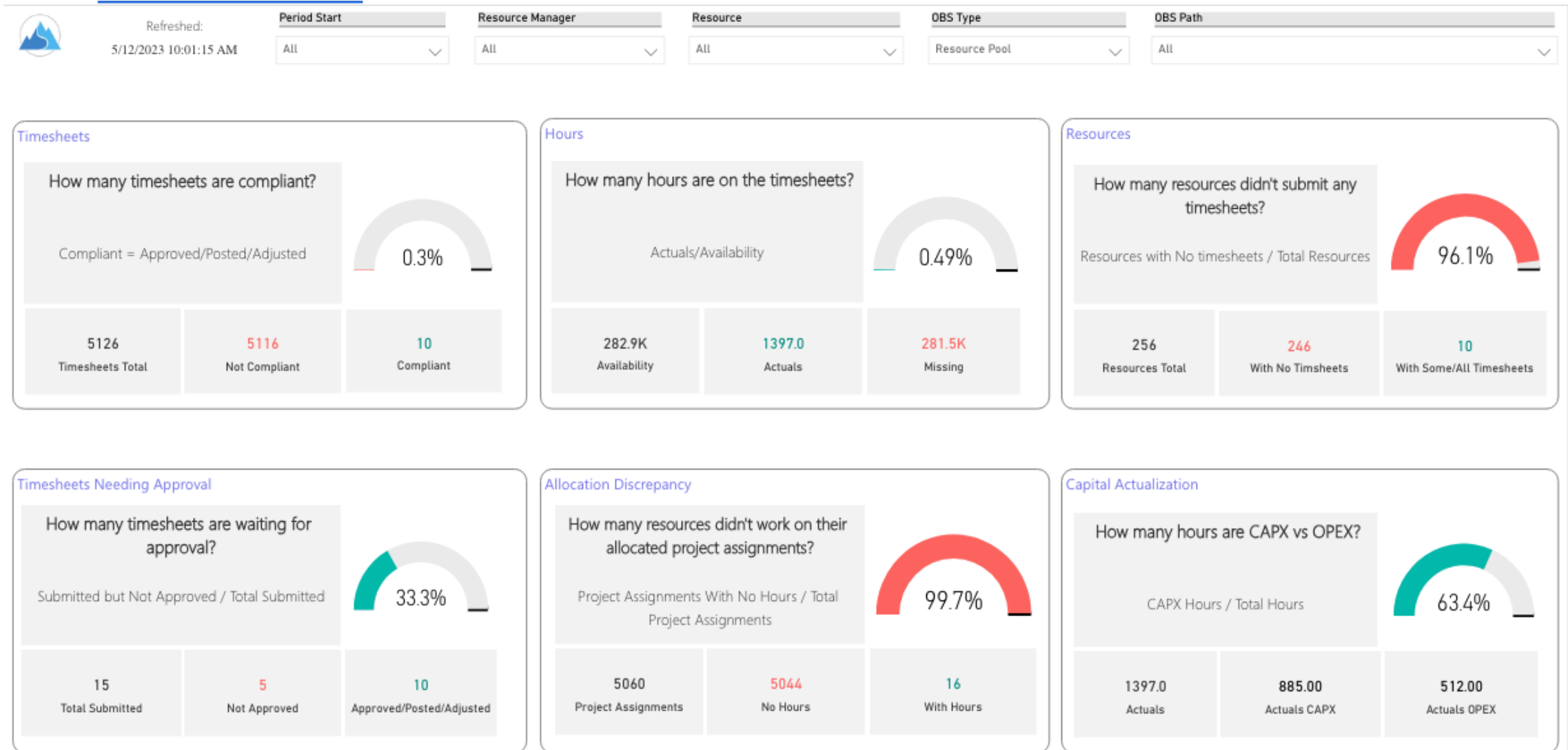
Total	0.4%	3,406	12
Chief Strategy Officer (CSO)	0.2%	445	1
CHRO		151	
Executive Management-6		12	
Finance-6		74	
Internal Audit-6		5	
Legal and Corporate Services-		93	
Office of Safety and Quality		38	
Operations	0.2%	1,144	2
Technology	0.6%	1,444	9

Resource Month Availability Resource Manager Email Booking Manager Primary Role

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

Timesheet Compliance

Timesheet Summary



Timesheet Detail

You are viewing 255 resources from 14 manager(s)

Last Refreshed: 3/16/2023 5:44:56 PM

Period Start

All

Resource Manager

All

Resource

All

OBS Type

Corporate Departme...

OBS Path

All

Timesheets Summary

2550

Total

13

Open

2532

Missing

4

Submitted

0

Returned

1

Approved/Posted/Adjusted

Show me open timesheets by:

Resource Manager

Resource OBS

Resoure Class

Employment Type

Vendor

Department

Primary Role

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

Open Timesheets Trend

(Blank) Account Manager Architect Architect PS Business Analyst Business Arch... Champion Coach DBA

300

20

20

20

20

20

20

20

20

20

20

16

16

16

16

16

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1/23/23

1/30/23

2/6/23

2/13/23

2/20/23

2/27/23

3/6/23

3/13/23

3/20/23

3/27/23

Open Timesheets

(Blank) SME Project Manager BT Developer Engineer Project Manager Test Engineer Architect Business Analyst Network Engineer Product Manager Team Lead Champion

240

200

160

140

140

140

118

108

80

70

60

60

59

0

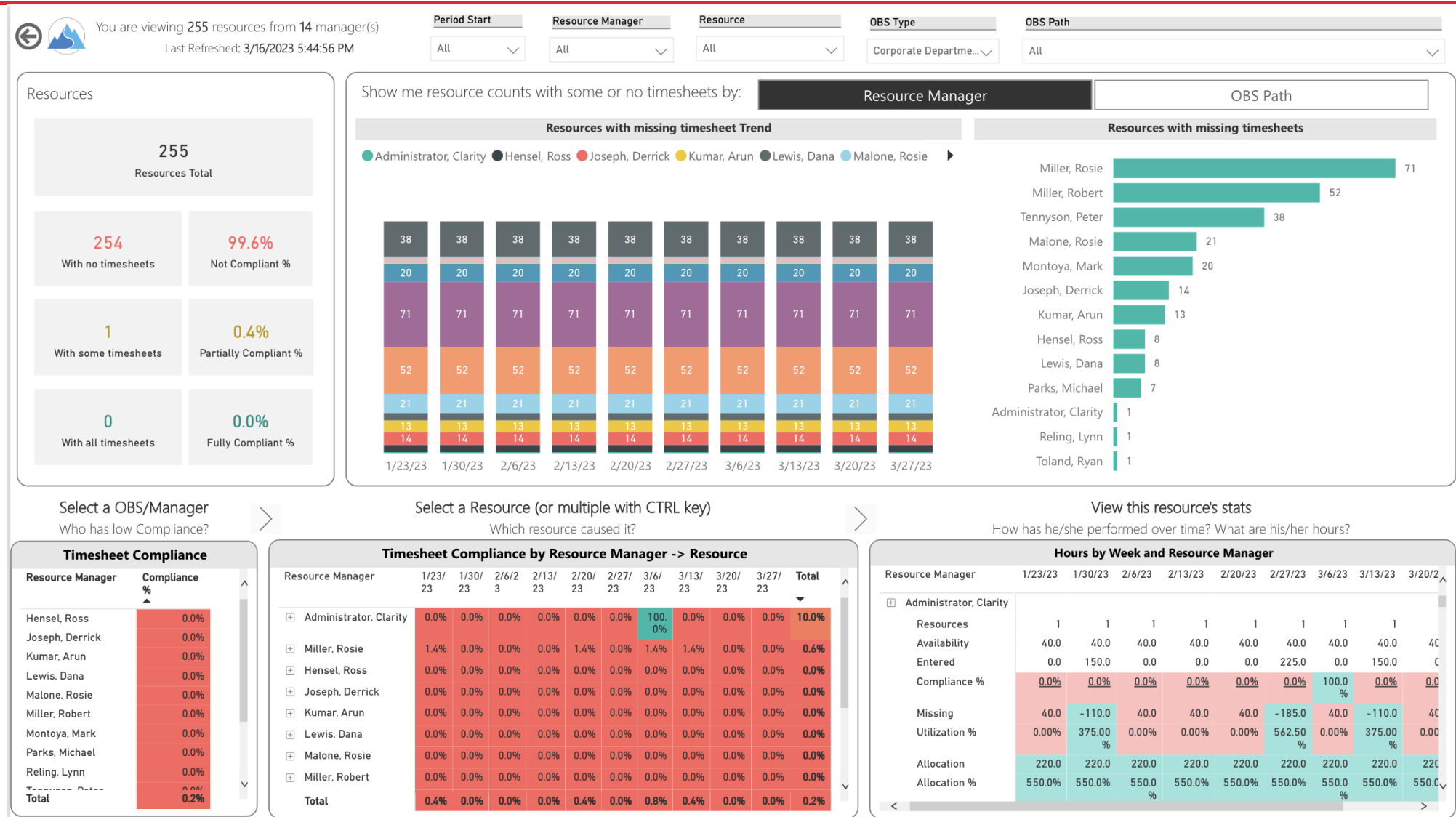
100

200

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

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

Resource Detail



Hours Detail

You are viewing 255 resources from 14 manager(s)

Last Refreshed: 3/16/2023 5:44:56 PM

Period Start

Resource Manager

Resource

OBS Type

OBS Path

All

All

All

Corporate Departme...

All

What's the weekly trend?

Hours by Time Period

● Availability ● Actuals ● Allocation

Show me:

Actuals

Allocations

Sliced by:

Investment Type

Investment Manager

Cost Type

Priority

Department

Charge Code

Top consuming Investments & Tasks

Investment

Task

Select a manager

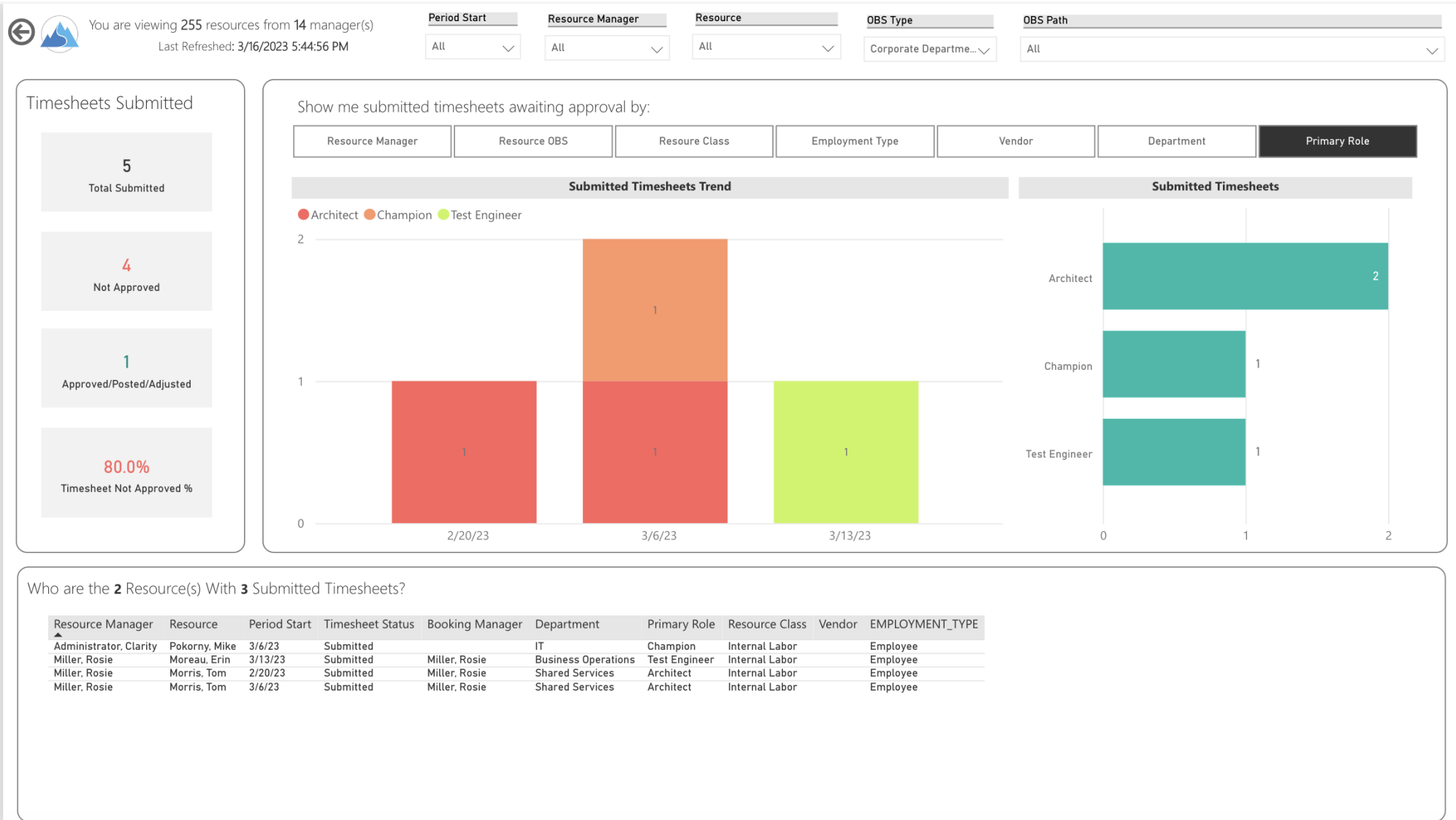
Who has the most missing hours?

View resource details

How are his/her resources entering time and allocations?

Hours by Week and Resource Manager

Resource Manager	Resources	Availability	Entered	Compliance %	Missing	Utilization %	Allocation	Allocation %	Act vs Avail	Act vs Alloc	Avail vs Alloc
Administrator, Clarity	1	400.0	525.0	10.0%	-125.0	131.25%	2,200.0	550.0%	125.0	-1,675.00	-1,800.00
Pokorny, Mike	1	400.0	525.0	10.0%	-125.0	131.25%	2,200.0	550.0%	125.0	-1,675.00	-1,800.00
Administrator, Clarity						0.00%					
Gubeno, Dave						0.00%					
Morgan, Christi						0.00%					
Test NK, Test NK						0.00%					
Miller, Rosie	71	27,842.0	38.0	0.6%	27,804.0	0.14%	25,472.3	91.5%	-27,804.0	-25,434.32	2,369.68
Moreau, Erin	1	400.0	38.0	20.0%	362.0	9.50%	800.0	200.0%	-362.0	-762.00	-400.00
Agile, Andre	1	400.0	0.0	0.0%	400.0	0.00%	1,056.0	264.0%	-400.0	-1,056.00	-656.00
America, Captain	1	392.0	0.0	0.0%	392.0	0.00%	349.1	89.1%	-392.0	-349.15	42.85
Total	254	142,862.0	572.0	0.2%	142,290.0	0.40%	134,727.9	94.3%	-142,290.0	-134,155.93	8,134.07



You are viewing 255 resources from 14 manager(s)

Last Refreshed: 3/16/2023 5:44:56 PM

Period Start

Resource Manager

Resource

OBS Type

OBS Path

All

All

All

Corporate Departme...

All

Total Time Entered

572.00

Actuals Total

0.00

CAPX

47.00

OPEX

0.0%

CAPITAL %

8.2%

OPERATING %

What's the weekly trend?

CAPX vs OPEX

Period	CAPX	OPEX	OPEX %
1/23/23	47	0	0%
1/30/23	150	0	0%
2/27/23	225	0	0%
3/13/23	150	0	0%

Show me time entered by:

Investment

Task

Time Entered

Category	Value
(Blank)	525
AS...	225.00

Who entered hours to the CAPX vs OPEX projects?

Resource Manager	Resource	Period Start	Investment ID	Investment	Investment Manager	Investment Department	Investment Cost Type	Task ID	Task	Actuals
Administrator, Clarity	Pokorny, Mike	2/27/23								225.00
Administrator, Clarity	Pokorny, Mike	1/30/23								150.00
Administrator, Clarity	Pokorny, Mike	3/13/23								150.00
Miller, Rosie	Moreau, Erin	1/23/23	PL-003	AS Services	Administrator, Clarity	Business Operations	OPERATING	~rmw	AS Services	28.00
Miller, Rosie	Moreau, Erin	1/23/23	PR1046	Technical Architecture	Malone, Paula	Shared Services	OPERATING	~rmw	NS1B	10.00
Lewis, Dana	AB Team	1/23/23	PR1422	Weather Monitoring Warning systems 2.6	Martin, Paul	Business Operations	OPERATING	~rmw	Weather Monitoring Warning systems 2.6	9.00
Total										572.00

Allocation Variance

You are viewing 255 resources from 14 manager(s) Last Refreshed: 3/16/2023 5:44:56 PM		Period Start All	Resource Manager All	Resource All	OBS Type Corporate Department...	OBS Path All	Investment Goal All
--	--	---------------------	-------------------------	-----------------	-------------------------------------	-----------------	------------------------

Which group has most allocation discrepancies?

-134.64K
Act vs Alloc

135.19K
Allocation

544.00
Actuals

Allocation Discrepancy by Investment Cost Type

Allocation Discrepancy by Resource Manager

What Investments/resources have most allocation discrepancies?

Investment

Resource

Allocation Discrepancy

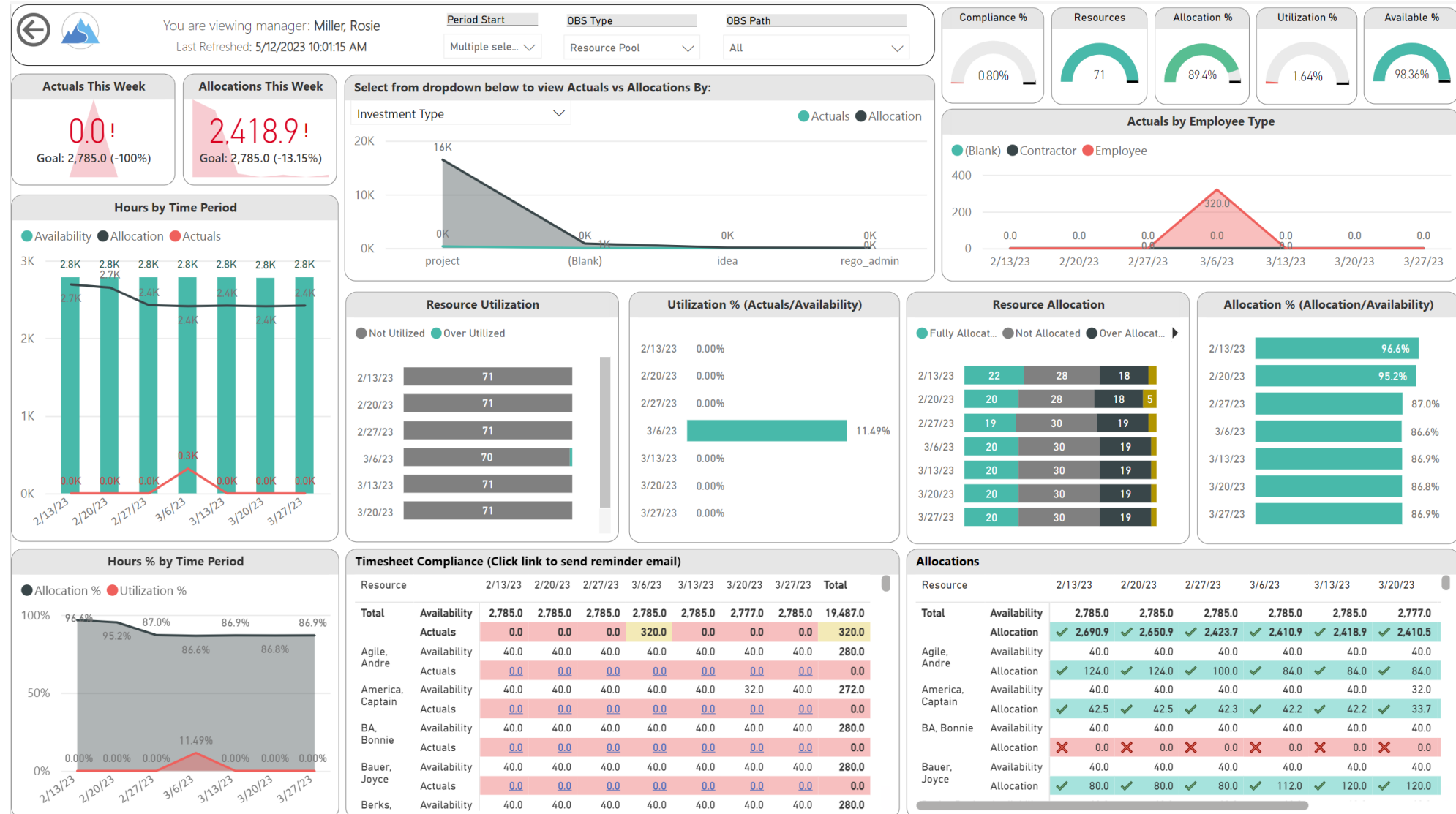
Select a row to enable detail buttons to view where resources logged their hours to instead:

Select a Manager to view detail

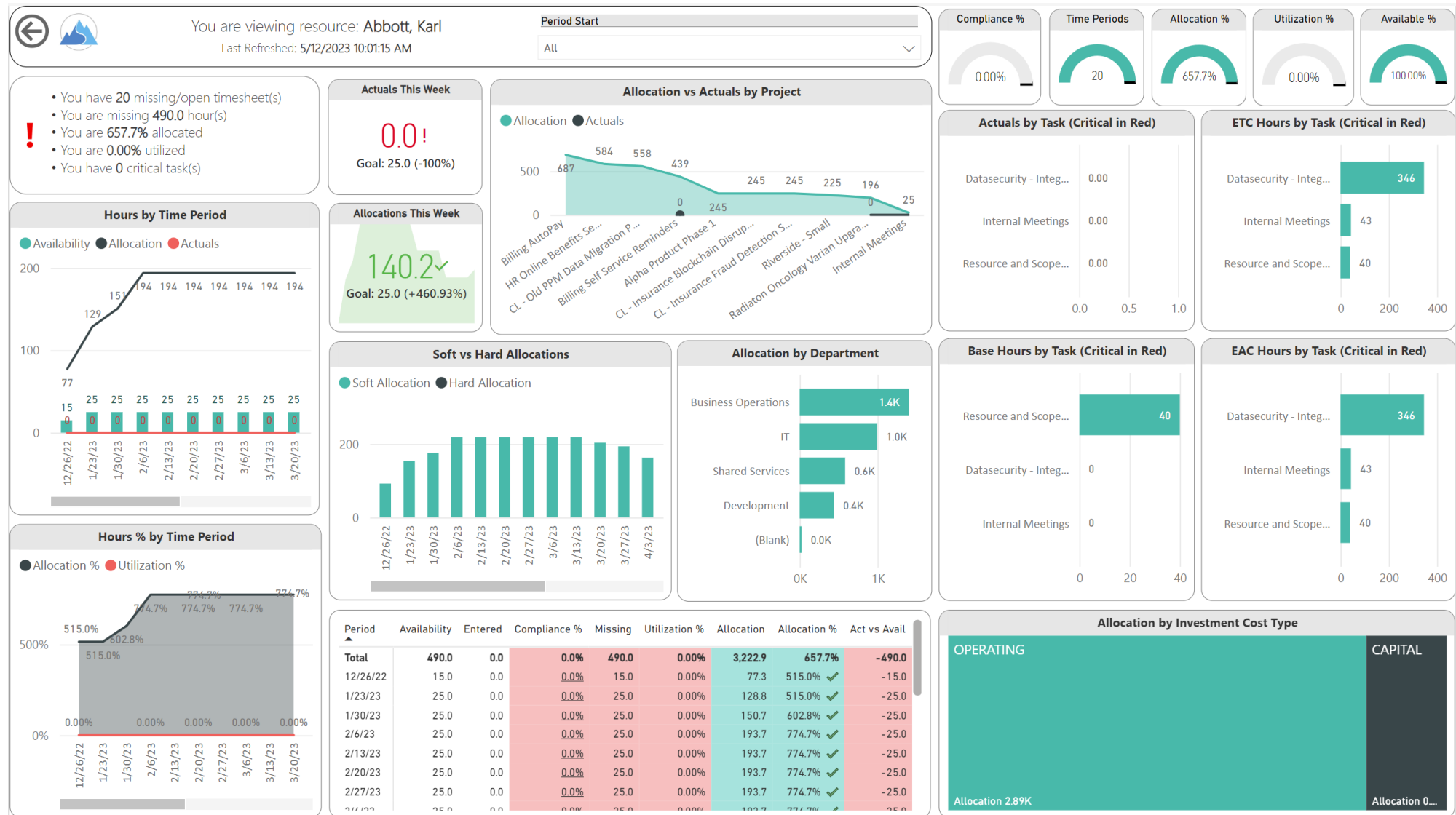
Select a Resource to view detail

Investment ID	Investment	Investment Manager	Resource Manager	Resource	OBS Path	Period Start	Timesheet Status	Act vs Alloc	Actuals	Allocation	Soft Allocation	Hard Allocation
			Administrator, Clarity	Pokorny, Mike	IT	2/27/23	Open	105.00	225.00	120.00	120.00	0.00
			Administrator, Clarity	Pokorny, Mike	IT	1/30/23	Open	30.00	150.00	120.00	120.00	0.00
			Administrator, Clarity	Pokorny, Mike	IT	3/13/23	Open	30.00	150.00	120.00	120.00	0.00
PR1046	Technical Architecture	Malone, Paula	Miller, Rosie	Moreau, Erin	IT Business Operations	1/23/23	Posted	-30.00	10.00	40.00	40.00	0.00
PR1422	Weather Monitoring Warning systems 2.6	Martin, Paul	Lewis, Dana	AB Team	IT	1/23/23	Open	-2,896.00	9.00	2,905.00	2,905.00	0.00
			Joseph, Derrick	Coleman, Joyce	Product Management	3/27/23	Open	-120.00	0.00	120.00	120.00	0.00
			Malone, Rosie	Jennings, Kristin	Sales & Marketing	3/27/23	Open	-120.00	0.00	120.00	120.00	0.00
			Miller, Robert	Berg, Kathryn	Business Transformation	3/27/23	Open	-120.00	0.00	120.00	120.00	0.00
			Miller, Rosie	Hill, Wayne	IT Business Operations	3/27/23	Open	-120.00	0.00	120.00	120.00	0.00
PR1502	aaa Project 1	Administrator, Clarity	Joseph, Derrick	Jones, Mike	Product Management	3/20/23	Open	-8.00	0.00	8.00	8.00	0.00
PR1502	aaa Project 1	Administrator, Clarity	Joseph, Derrick	Jones, Mike	Product Management	3/27/23	Open	-8.00	0.00	8.00	8.00	0.00
PR1502	aaa Project 1	Administrator, Clarity	Joseph, Derrick	Phillips, Peter	Product Management	2/27/23	Open	-8.00	0.00	8.00	8.00	0.00
PR1502	aaa Project 1	Administrator, Clarity	Joseph, Derrick	Phillips, Peter	Product Management	3/6/23	Open	-8.00	0.00	8.00	8.00	0.00
PR1502	aaa Project 1	Administrator, Clarity	Lewis, Dana	Fleming, Nicole	Product Management	2/6/23	Open	-8.00	0.00	8.00	8.00	0.00
PR1502	aaa Project 1	Administrator, Clarity	Lewis, Dana	Fleming, Nicole	Product Management	2/13/23	Open	-8.00	0.00	8.00	8.00	0.00
Total								-134,643.53	544.00	135,187.53	131,633.13	3,554.40

Single Manager Drill-Down

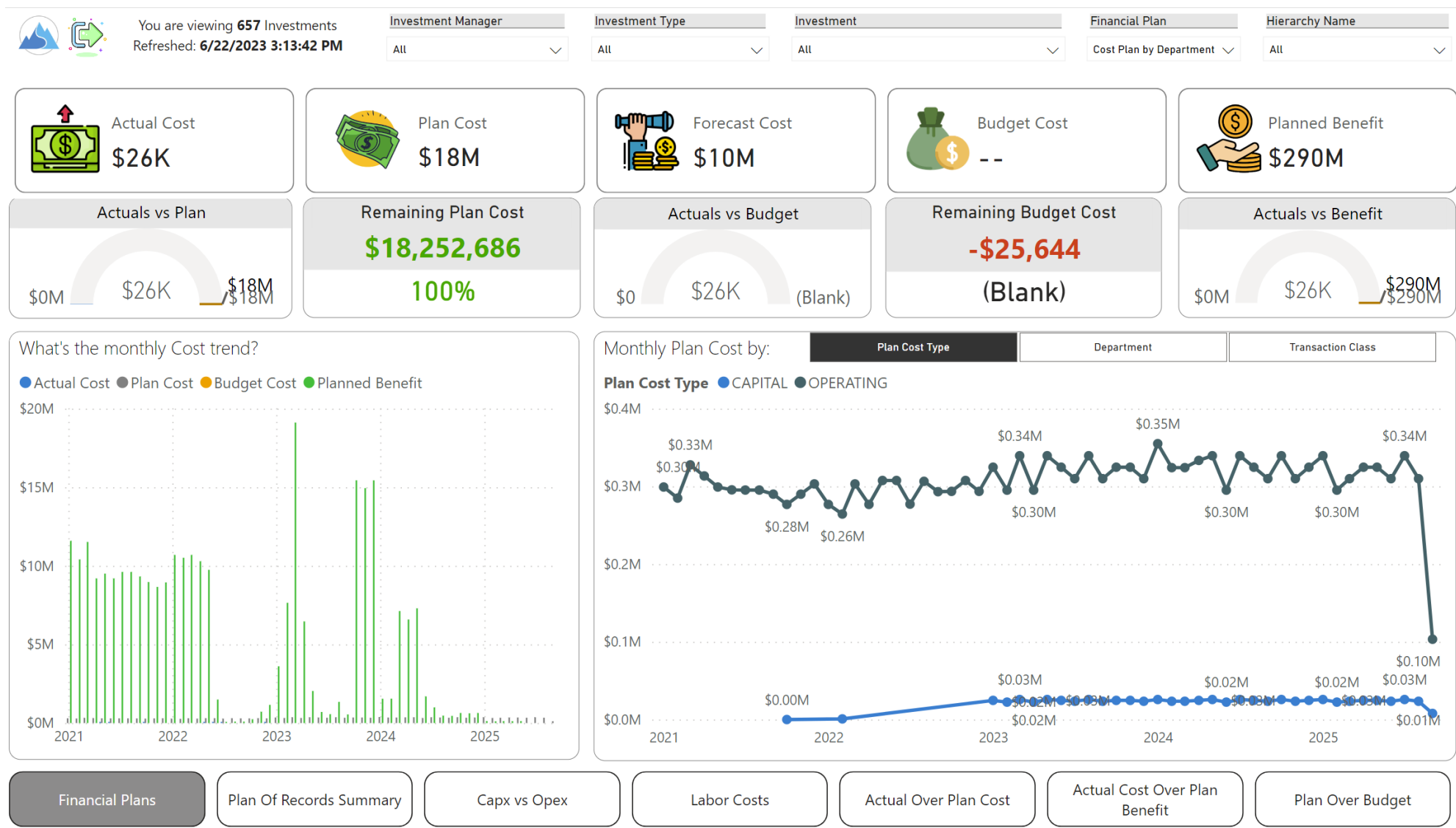


Single Resource Drill-Down

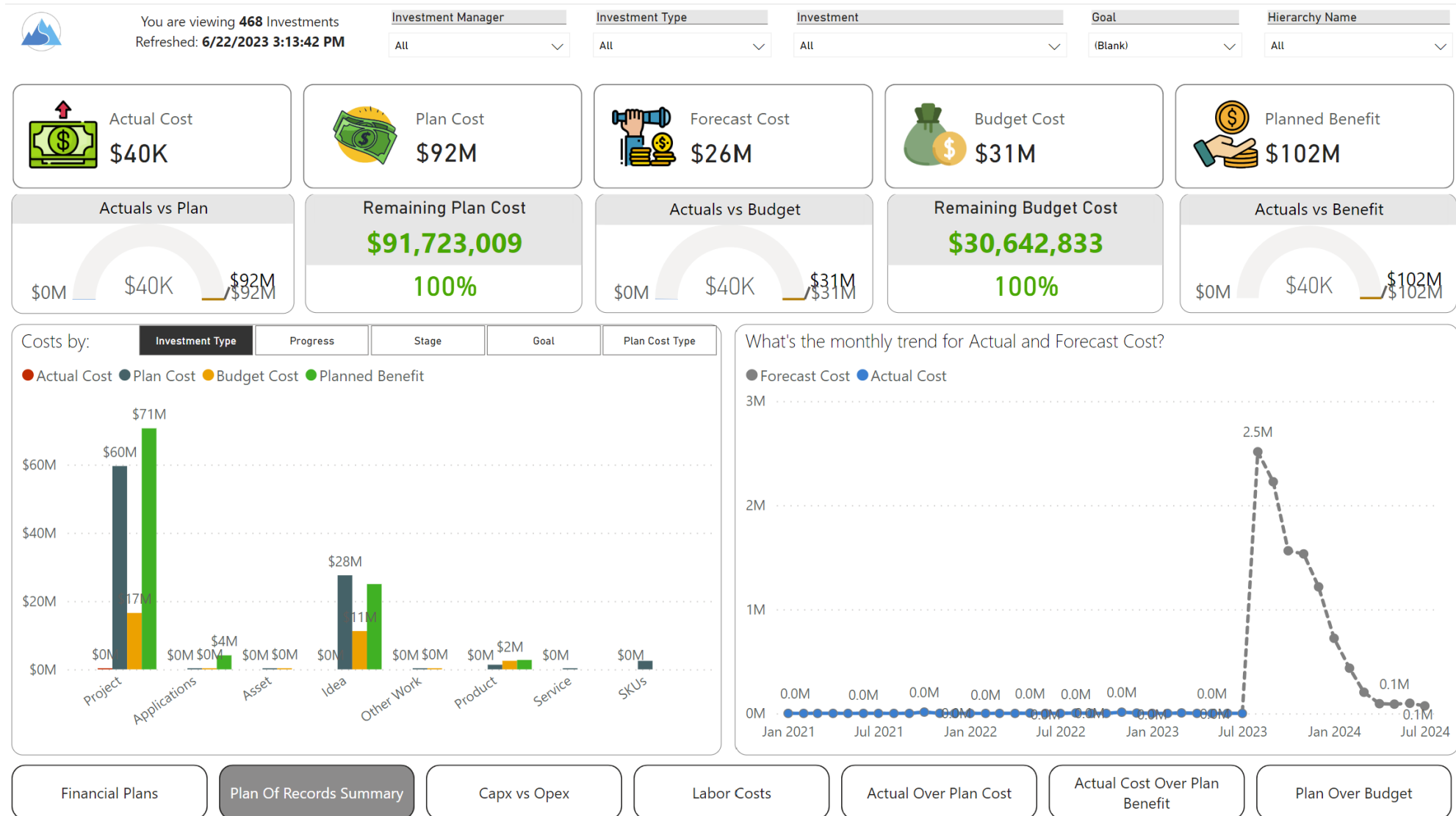


Financial

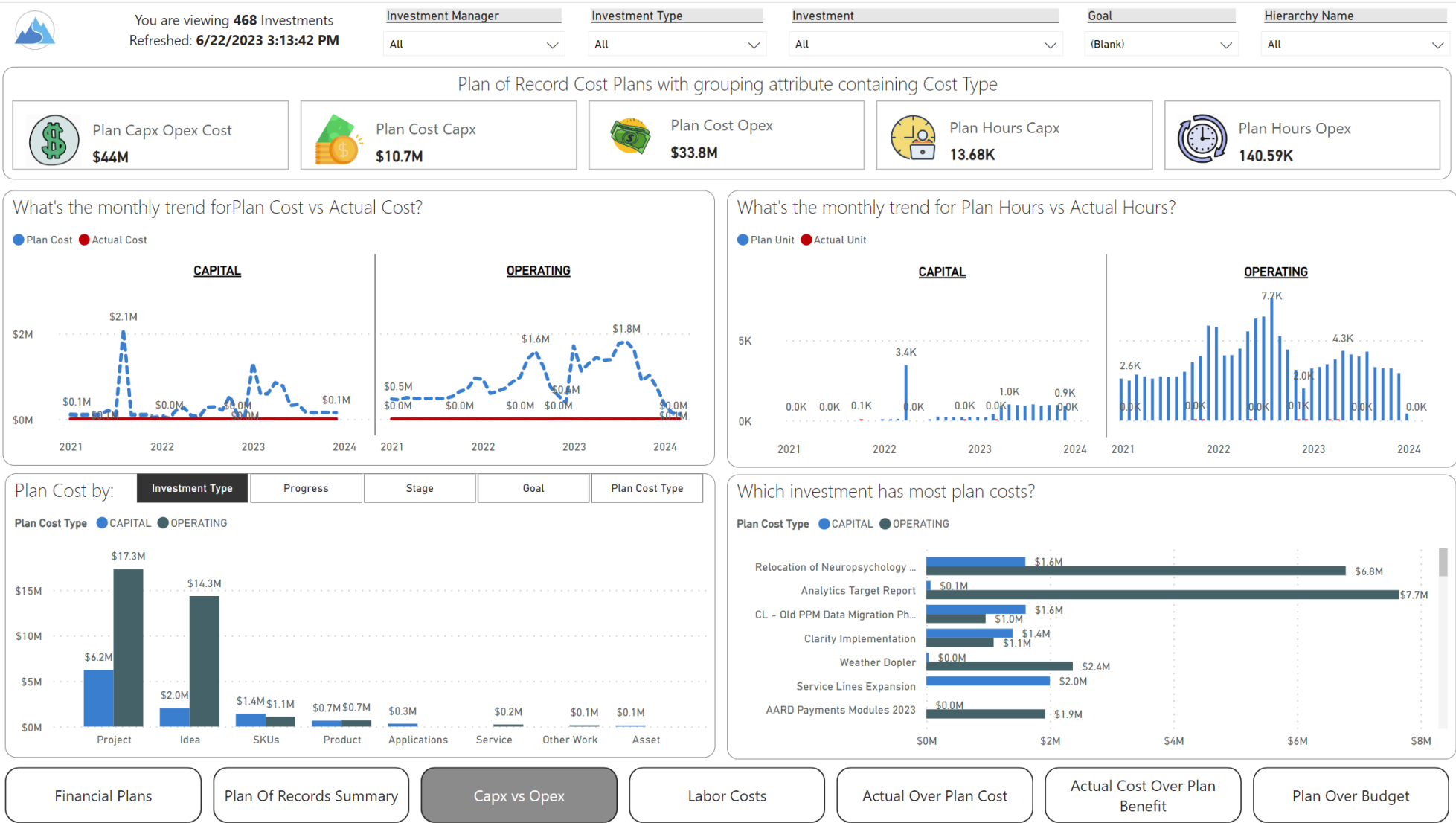
Financial Plans



Plan of Records Summary



CapEx vs. OpEx



What's the monthly trend for Plan Hours vs Actual Hours?

● Plan Unit ● Actual Unit

CAPITAL

Year	Plan Unit (K)	Actual Unit (K)
2021	0.0K	0.0K
2022	3.4K	0.0K
2023	1.0K	0.0K
2024	0.9K	0.0K

OPERATING

Year	Plan Unit (K)	Actual Unit (K)
2021	2.6K	0.0K
2022	7.7K	0.0K
2023	4.3K	0.0K
2024	0.0K	0.0K

Plan Cost by:

Investment Type

Progress

Stage

Goal

Plan Cost Type

Plan Cost Type ● CAPITAL ● OPERATING

Investment Type	CAPITAL (\$M)	OPERATING (\$M)
Project	\$6.2M	\$17.3M
Idea	\$2.0M	\$14.3M
SKUs	\$1.4M	\$1.1M
Product	\$0.7M	\$0.7M
Applications	\$0.3M	\$0.2M
Service	\$0.1M	\$0.1M
Other Work	\$0.1M	\$0.1M
Asset	\$0.1M	\$0.1M

Which investment has most plan costs?

Plan Cost Type ● CAPITAL ● OPERATING

Investment	CAPITAL (\$M)	OPERATING (\$M)
Relocation of Neuropsychology ...	\$1.6M	\$6.8M
Analytics Target Report	\$0.1M	\$7.7M
CL - Old PPM Data Migration Ph...	\$1.6M	\$1.0M
Clarity Implementation	\$1.4M	\$1.1M
Weather Dopler	\$0.0M	\$2.4M
Service Lines Expansion	\$2.0M	\$0.0M
AARD Payments Modules 2023	\$0.0M	\$1.9M

Financial Plans

Plan Of Records Summary

Capx vs Opex

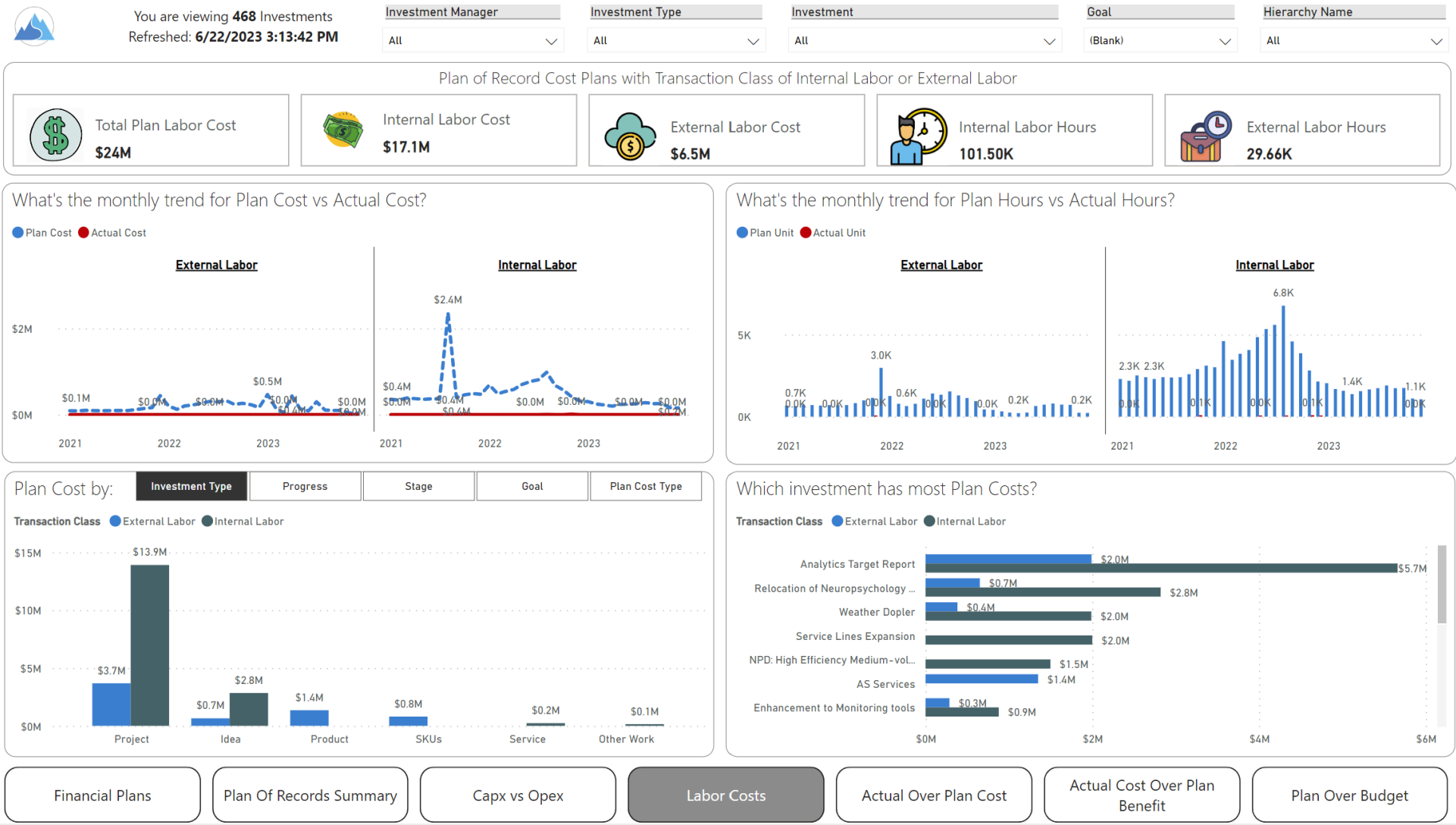
Labor Costs

Actual Over Plan Cost

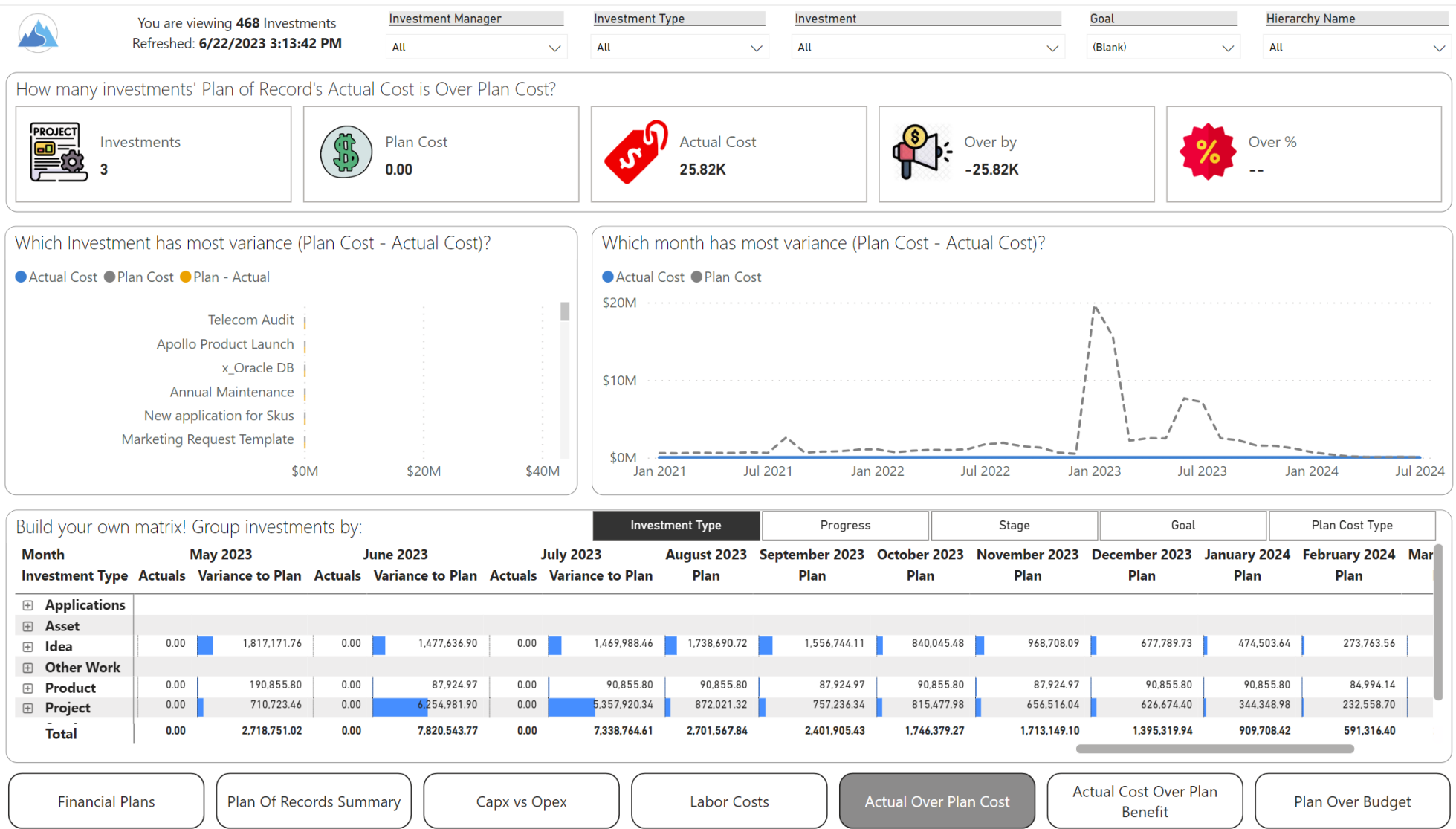
Actual Cost Over Plan Benefit

Plan Over Budget

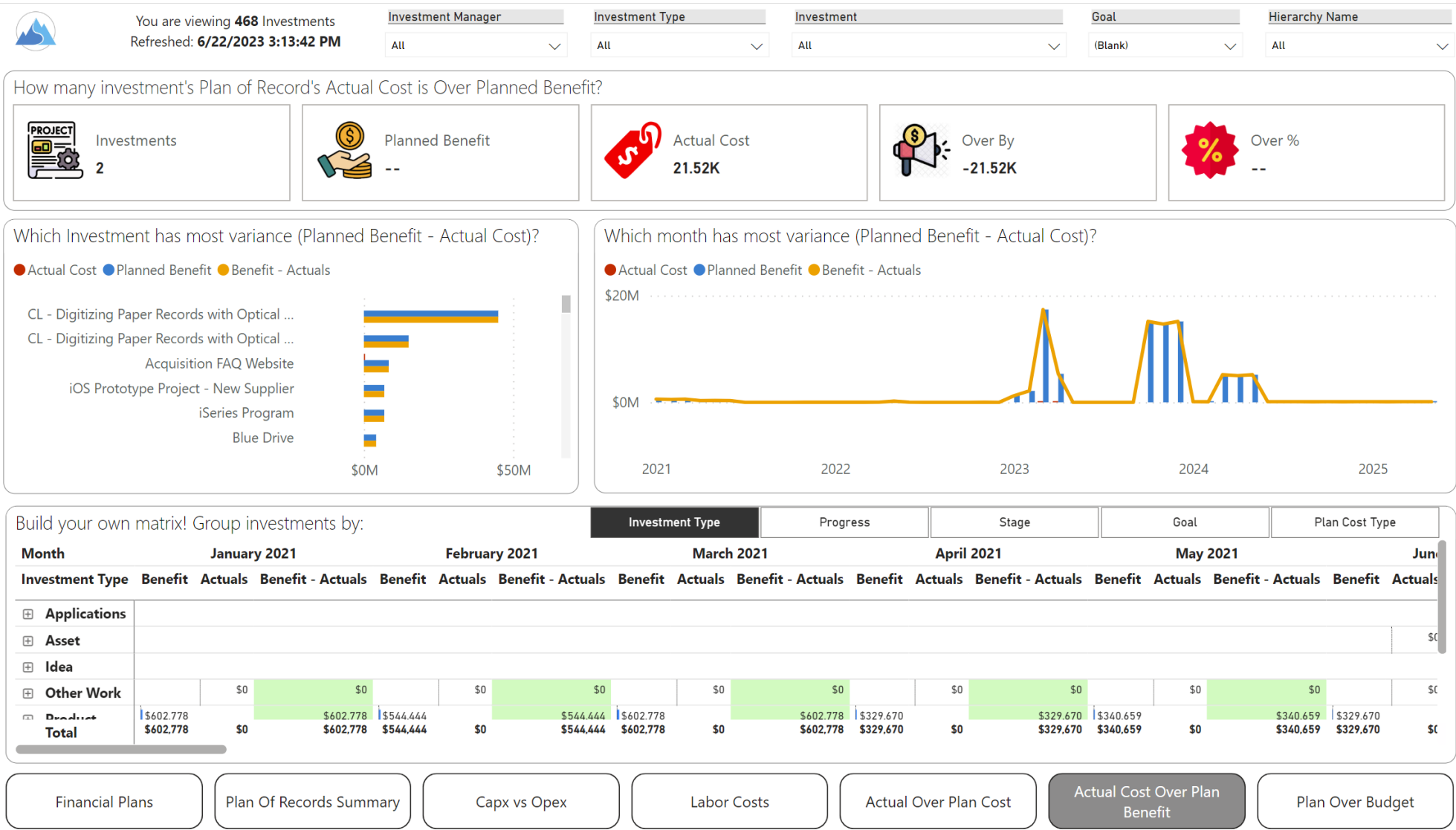
Labor Cost



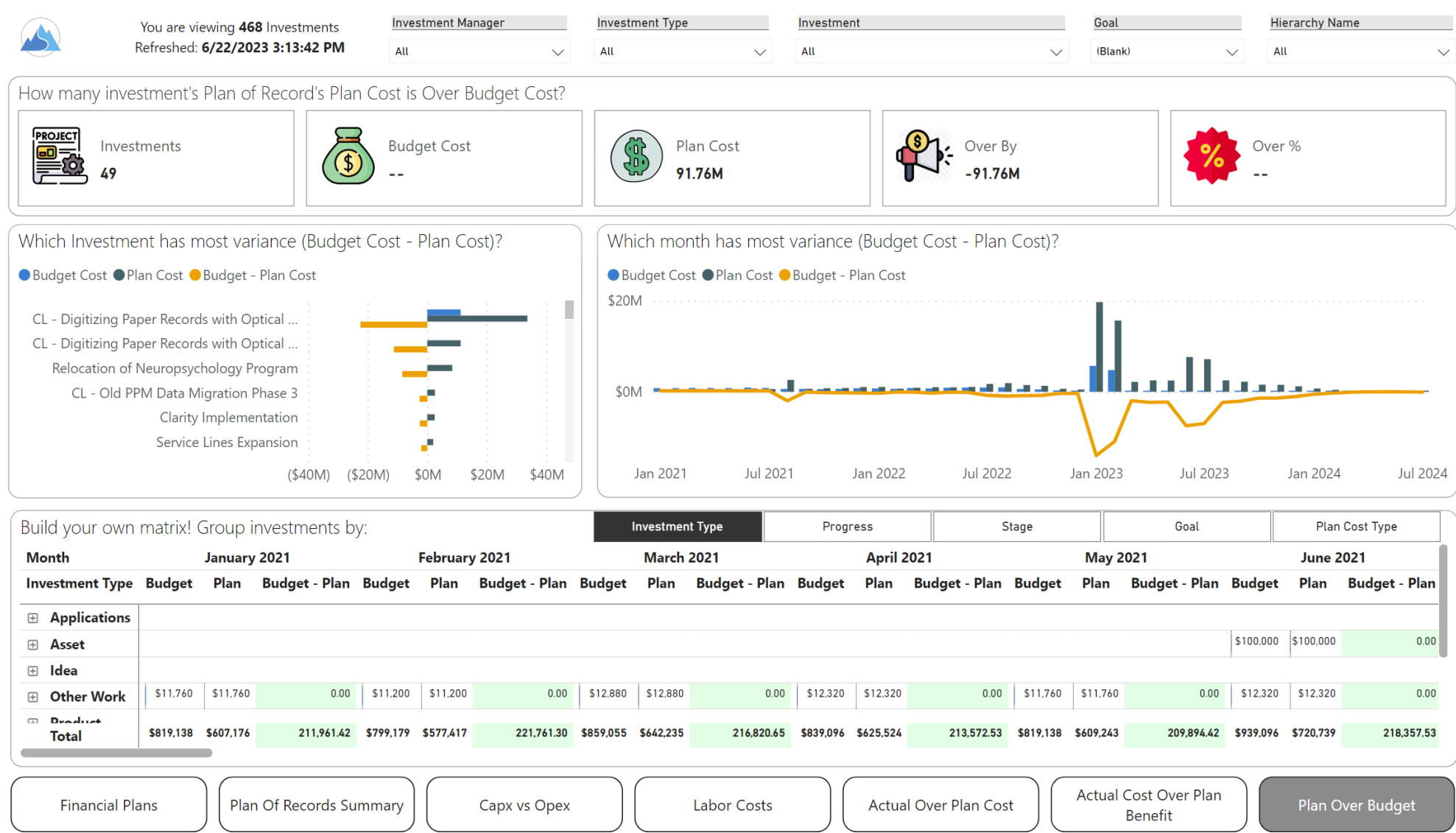
Actual Over Plan Cost



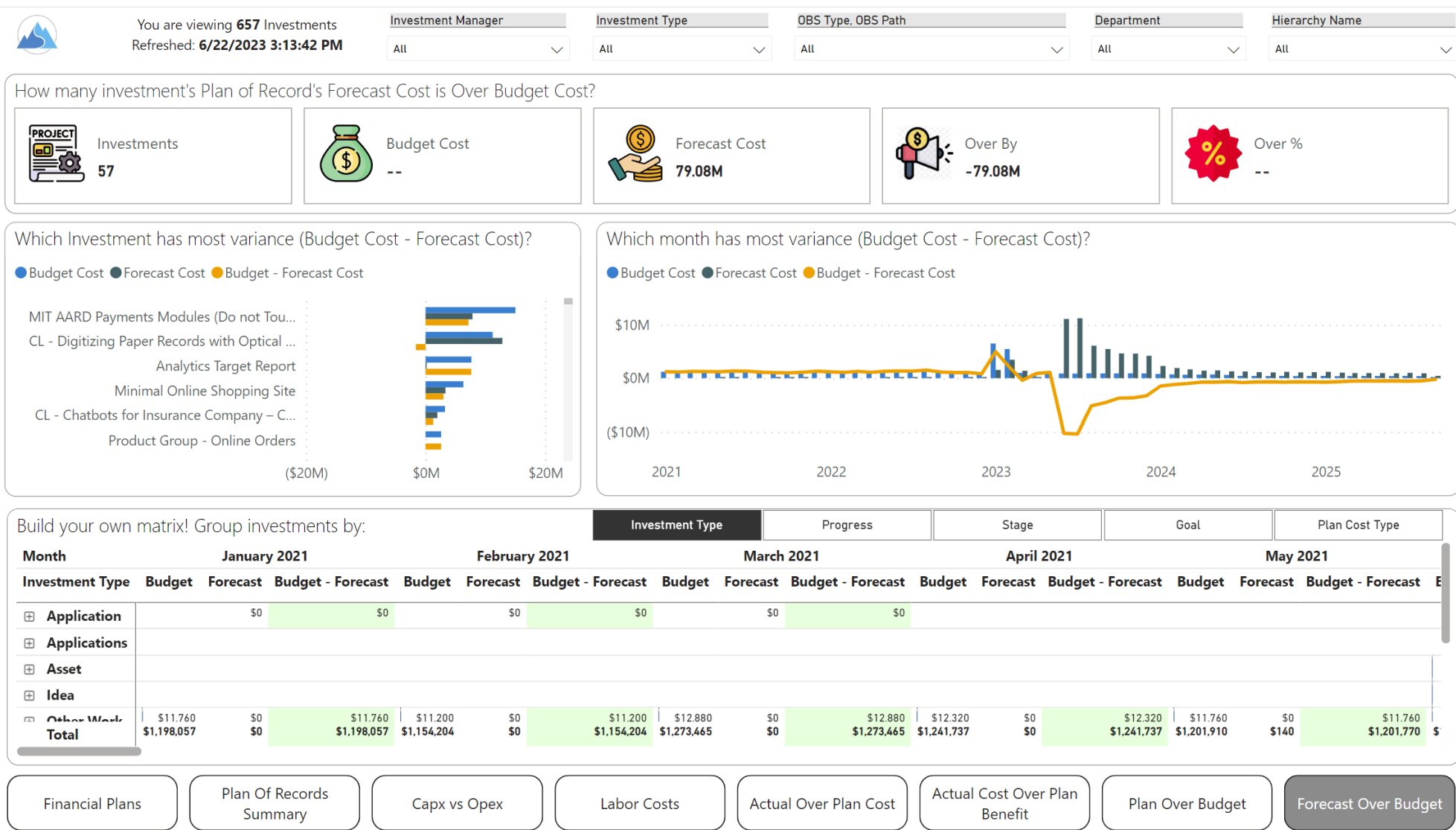
Actual Cost Over Plan Benefit



Plan Over Budget Cost

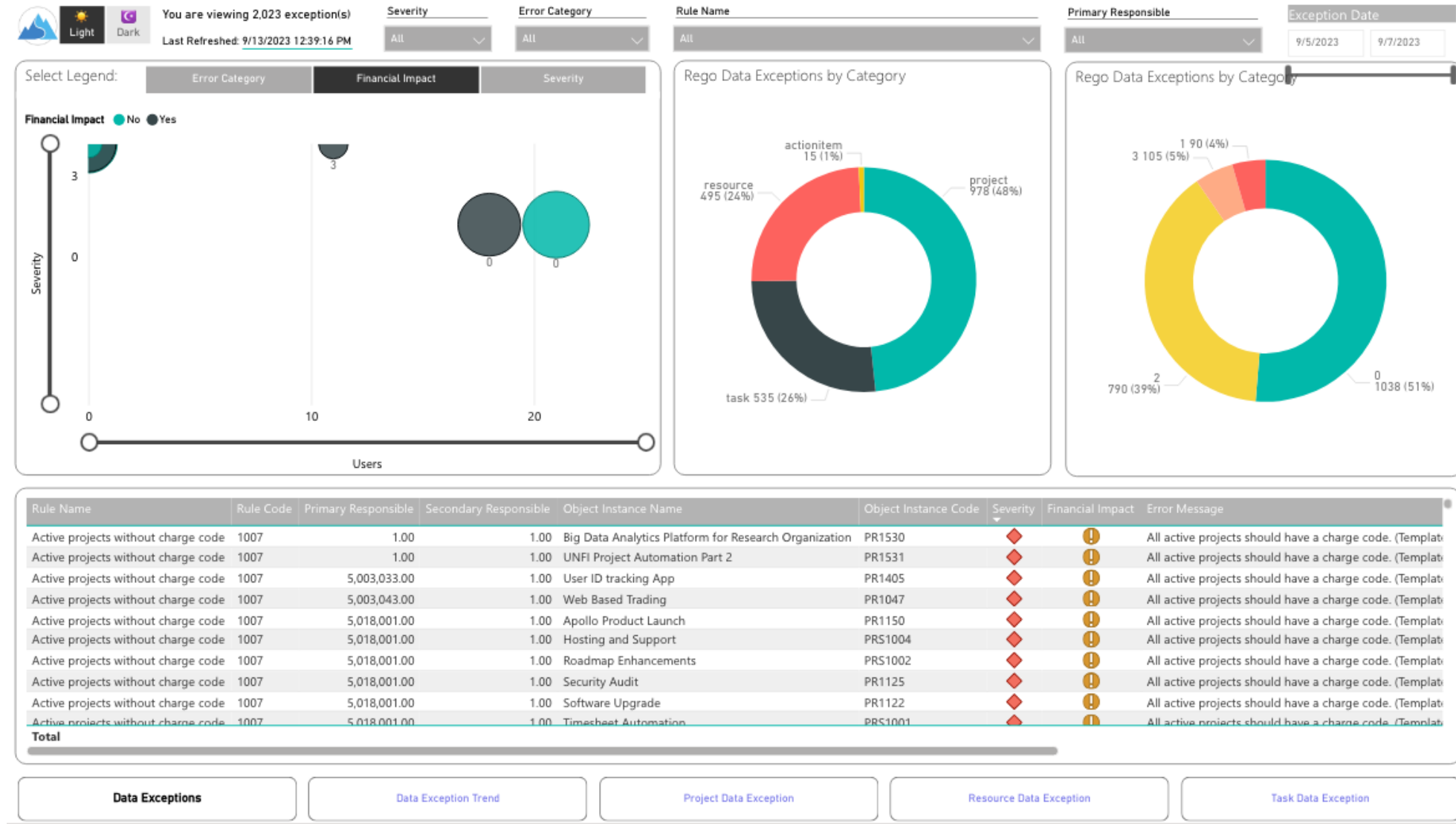


Forecast Over Budget Cost

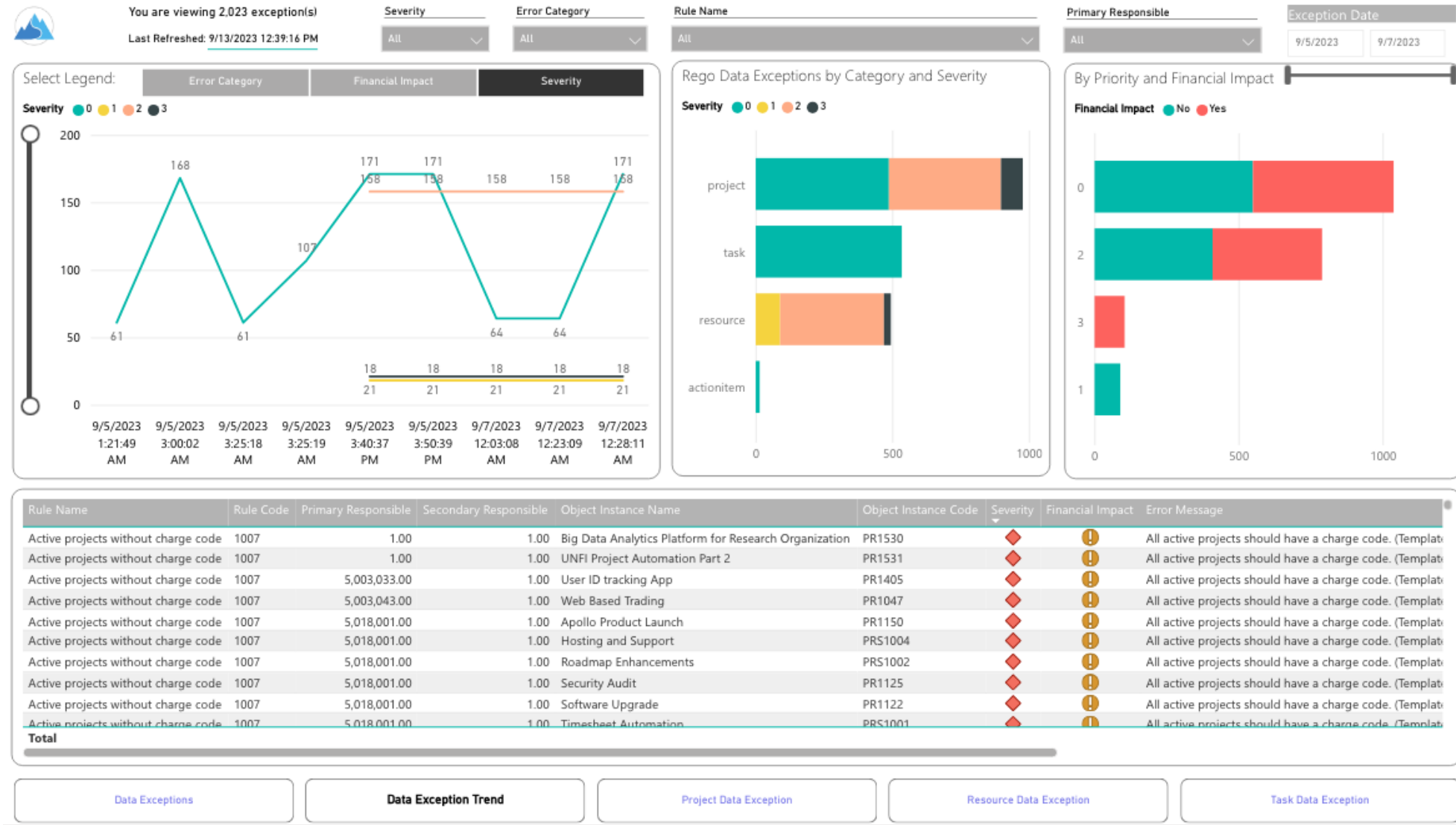


Data Integrity

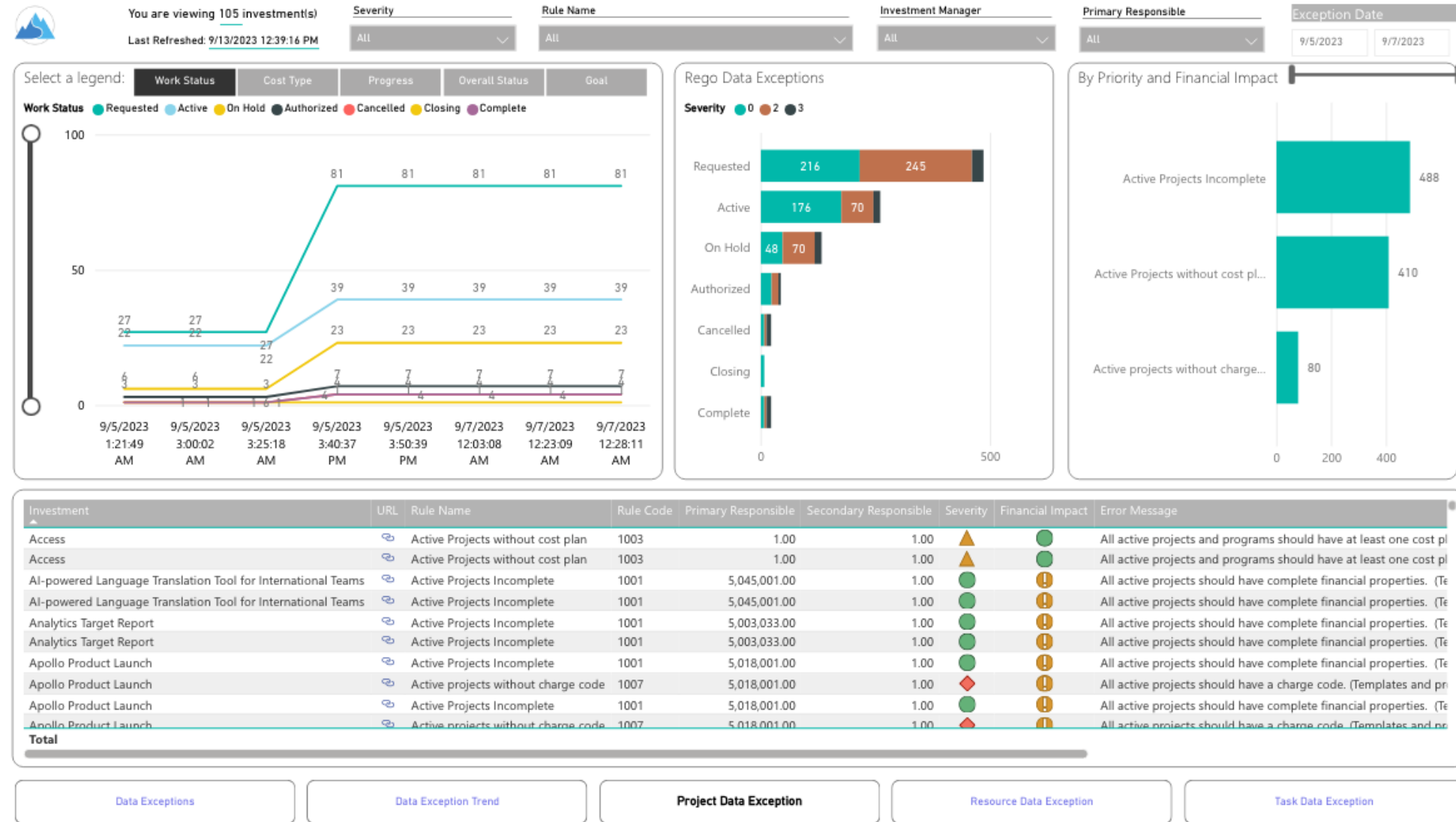
Data Exceptions



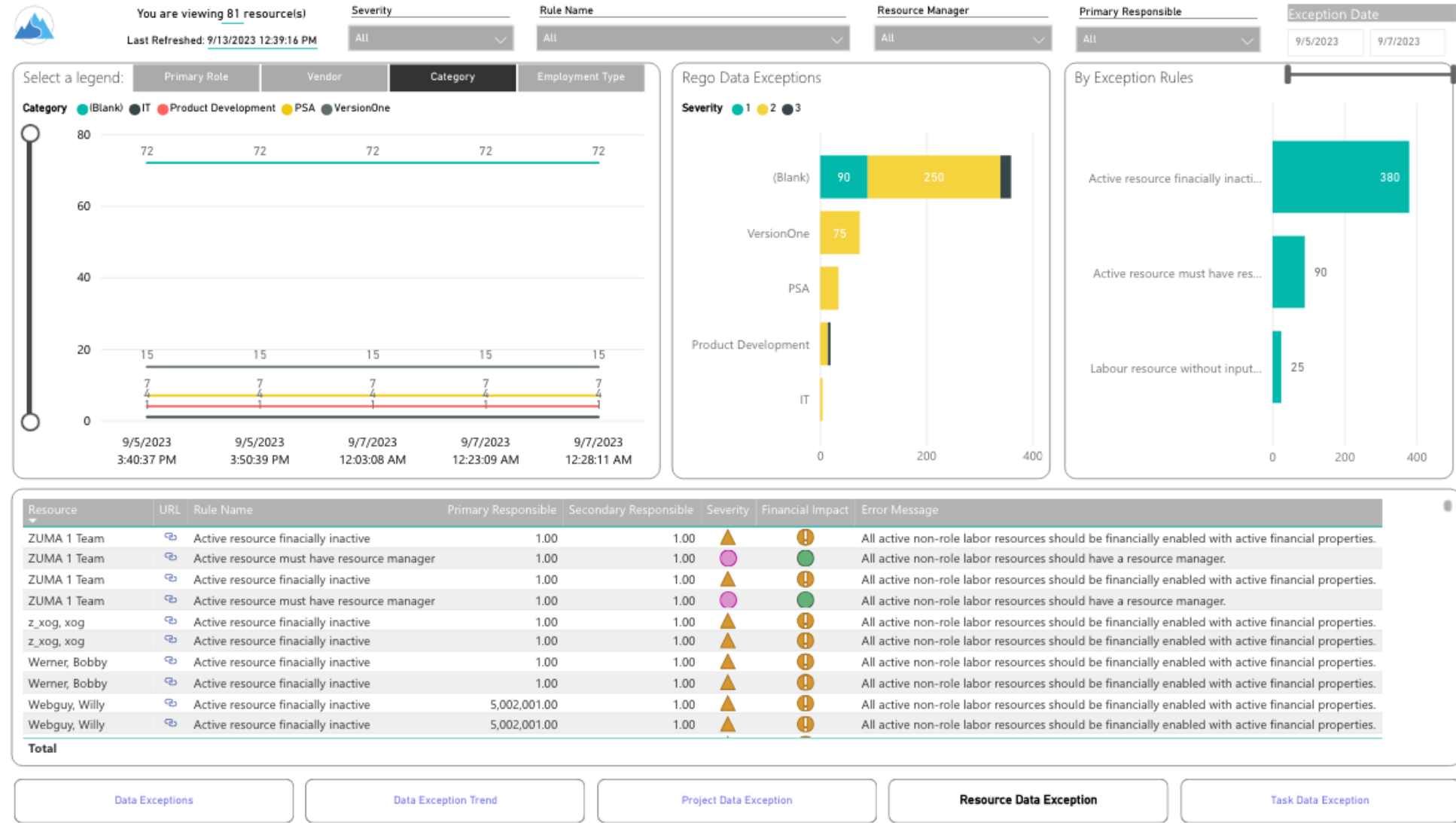
Data Exception Trend



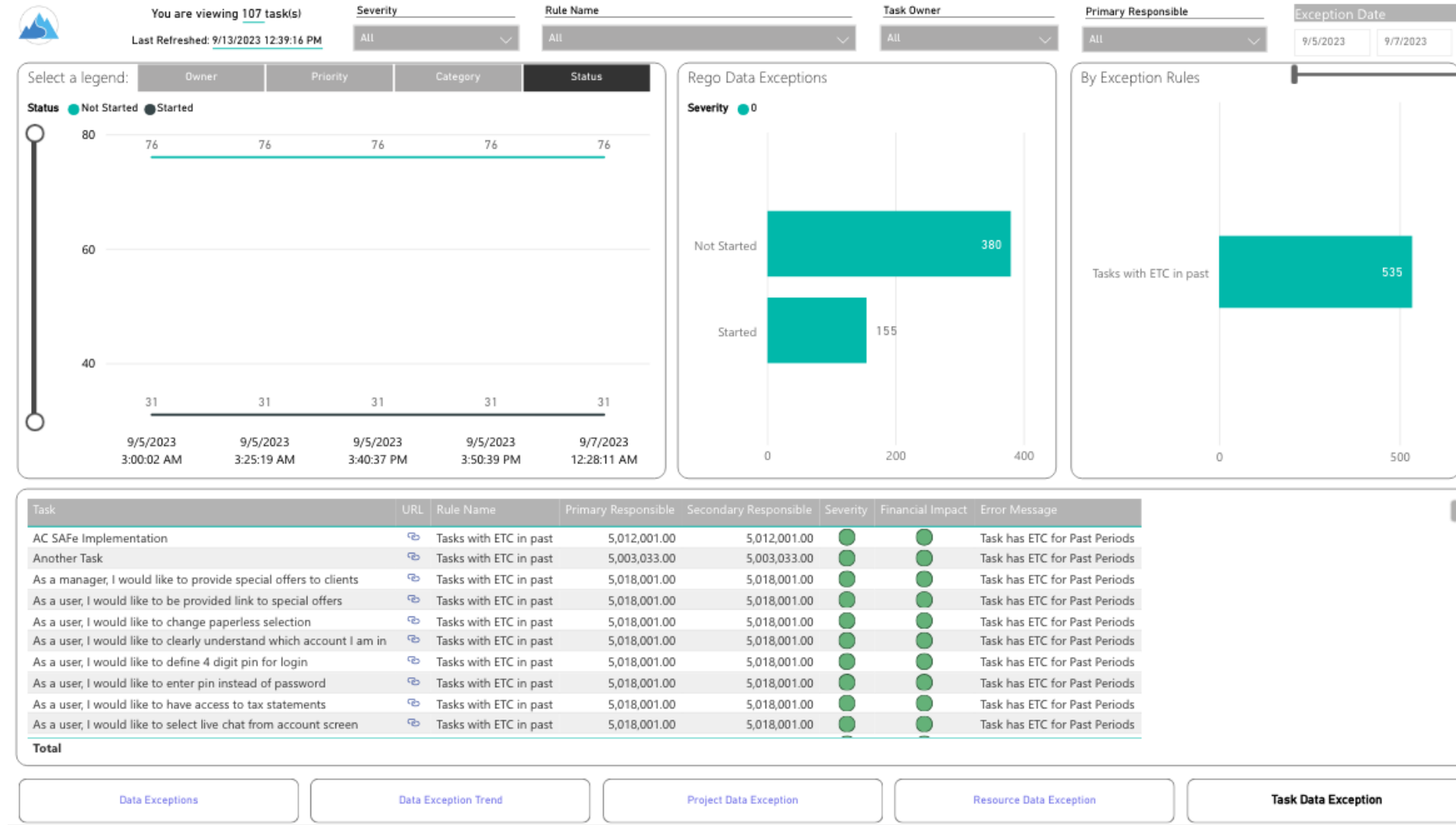
Project Data Exception



Resource Data Exception

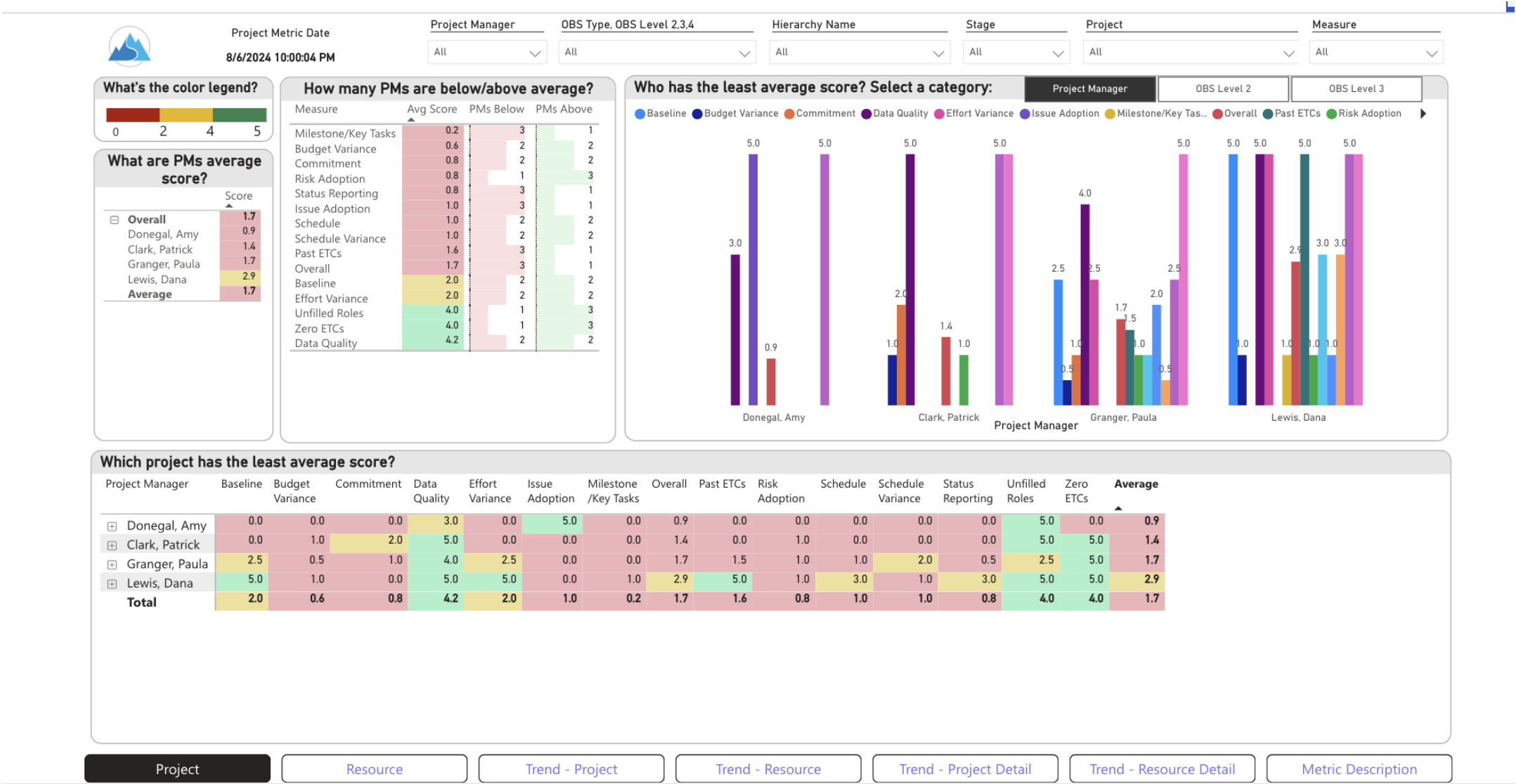


Task Data Exception



Adoption Metrics

Project Metrics



Project

Resource

Trend - Project

Trend - Resource

Trend - Project Detail

Trend - Resource Detail

Metric Description

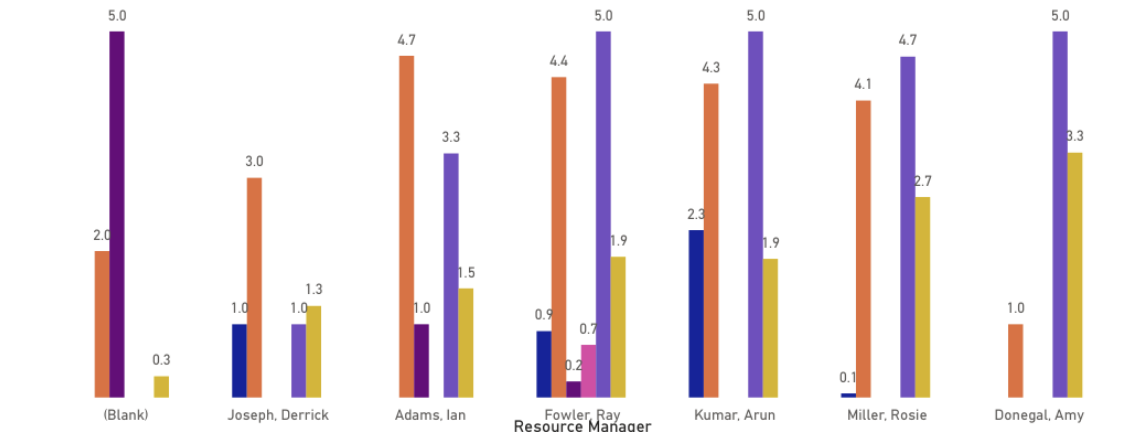
Resource Metrics



Who has the least average score? Select a category:

Resource ManagerOBS Level 2OBS Level 3

Actual UtilizationAllocationAllocation Date in the PastClarity ActivityCommitmentData QualityOverallTimesheet



Resource Manager	Actual Utilization	Allocation	Allocation Date in the Past	Clarity Activity	Commitment	Data Quality	Overall	Timesheet
(Blank)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Joseph, Derrick	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Adams, Ian	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Fowler, Ray	0.9	0.2	0.7	0.7	0.7	0.7	0.7	0.7
Kumar, Arun	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.3
Miller, Rosie	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Donegal, Amy	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0

Which resource has the least average score?

Resource Manager	Actual Utilization	Allocation	Allocation Date in the Past	Clarity Activity	Commitment	Data Quality	Overall	Timesheet	Average
		0.0	2.0	5.0	0.0	0.0	0.3	0.0	0.6
Adams, Ian	0.0	0.0	4.7	1.0	0.0	3.3	1.5	0.0	1.6
Donegal, Amy	0.0	0.0	1.0	0.0	0.0	5.0	3.3	0.0	2.0
Fowler, Ray	0.0	0.9	4.4	0.2	0.7	5.0	1.9	0.0	1.7
Joseph, Derrick		1.0	3.0		0.0	1.0	1.3		1.3
Kumar, Arun	0.0	2.3	4.3	0.0	0.0	5.0	1.9	0.0	1.7
Miller, Rosie	0.0	0.1	4.1	0.0	0.0	4.7	2.7	0.0	1.9
Total	0.0	0.7	4.1	0.3	0.2	4.3	2.2	0.0	1.7

Project

Resource

Trend - Project

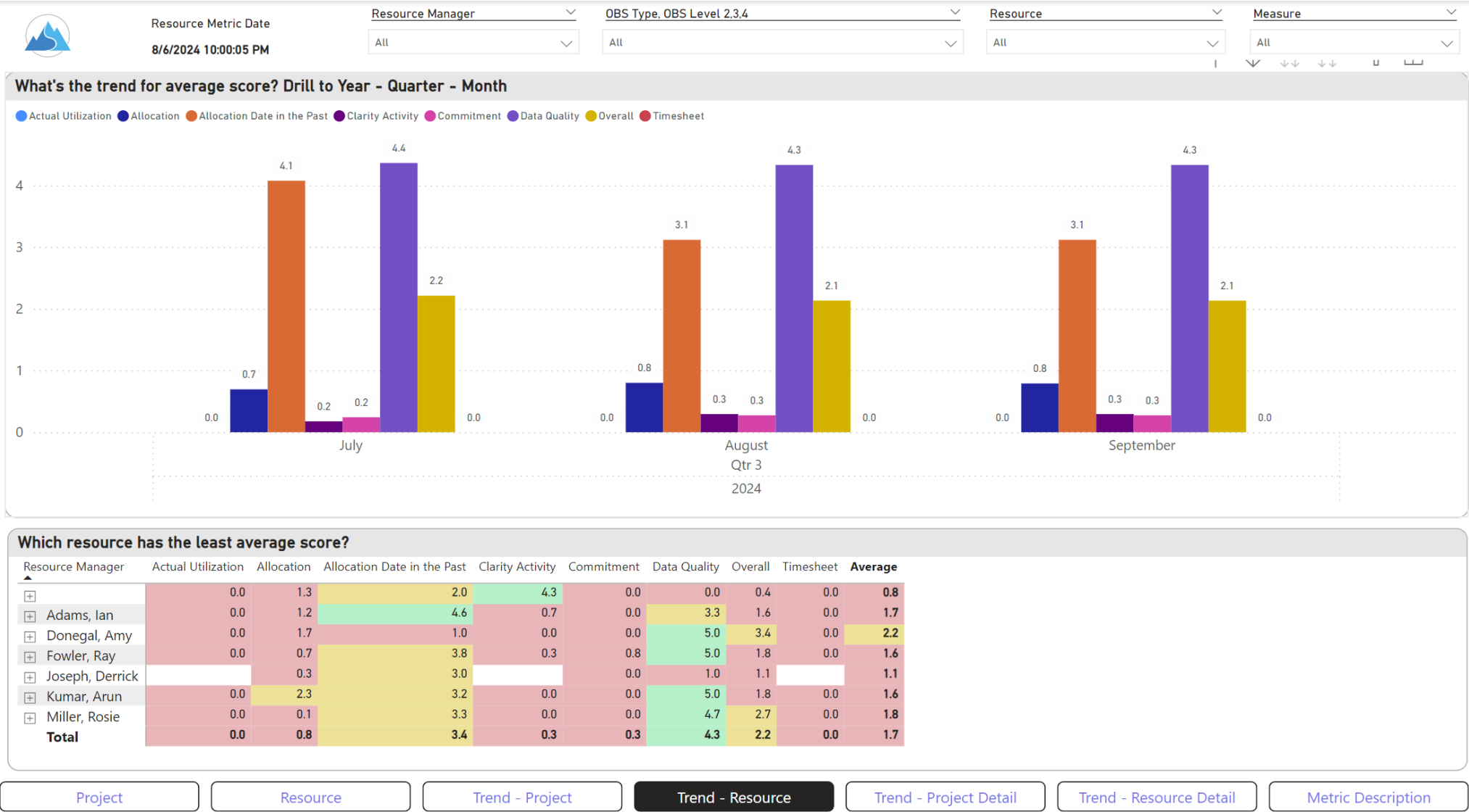
Trend - Resource

Trend - Project Detail

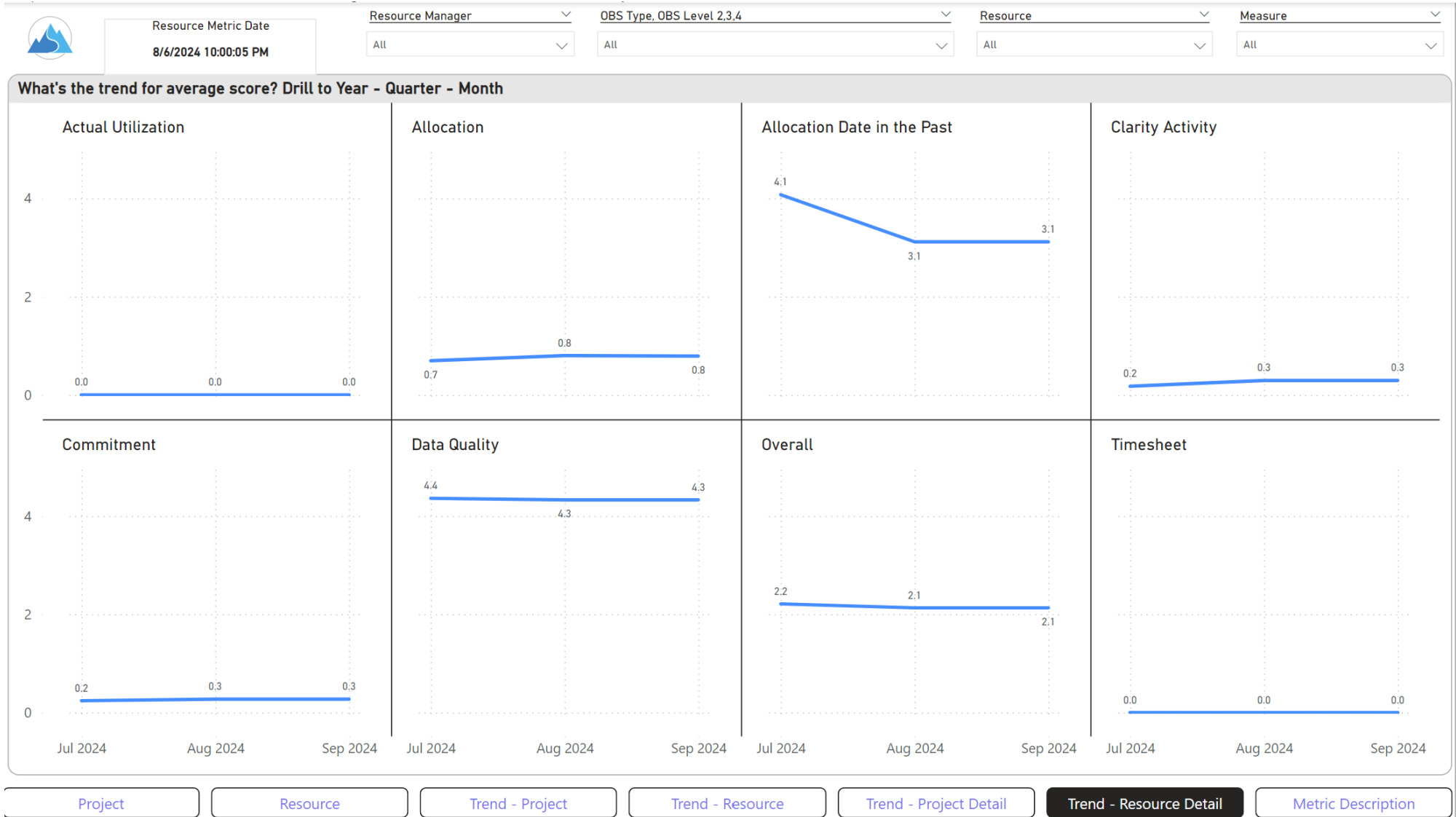
Trend - Resource Detail

Metric Description

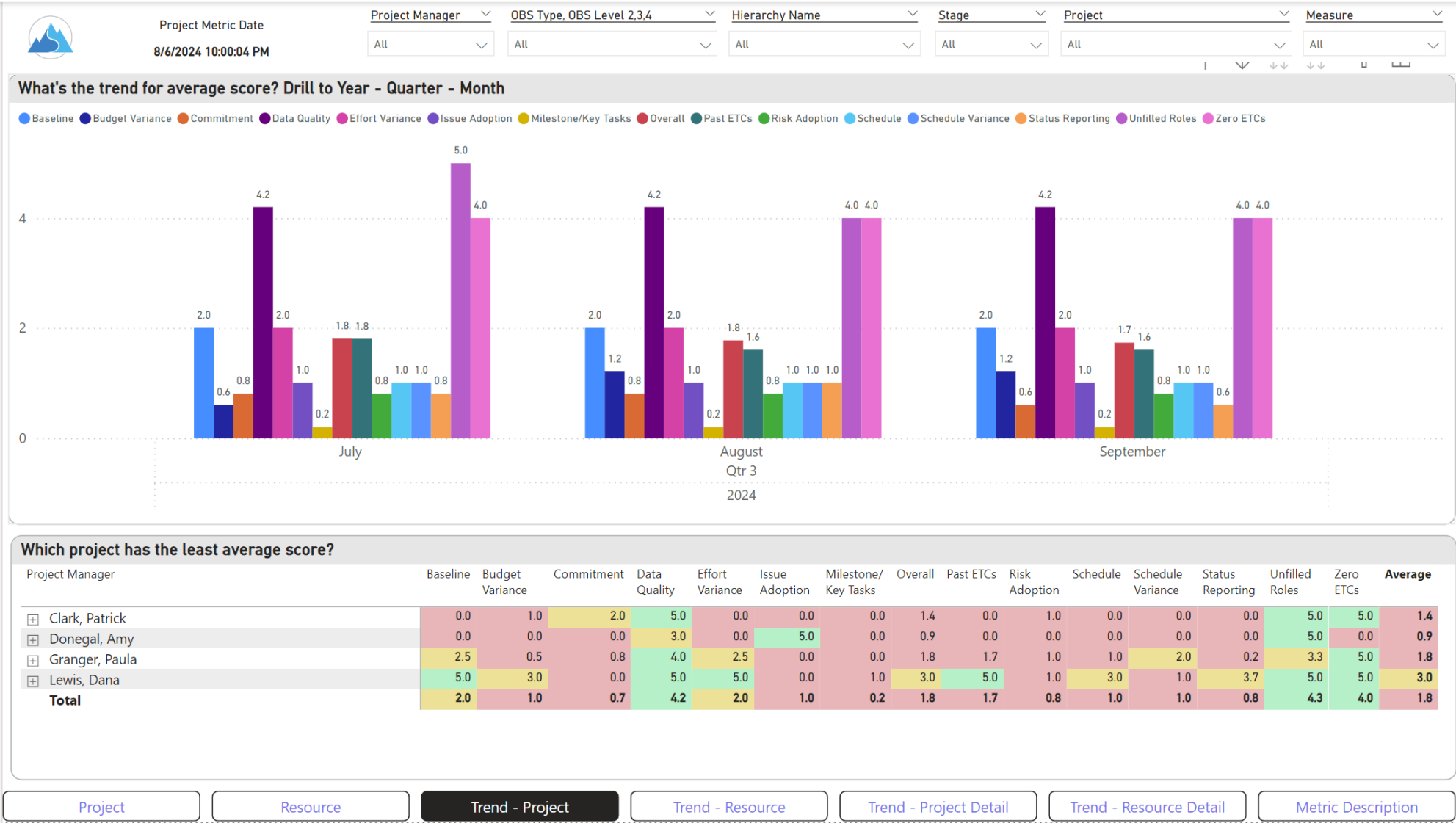
Resource Trends



Resource Trend Detail



Project Trends



Which project has the least average score?

Project Manager	Baseline	Budget Variance	Commitment	Data Quality	Effort Variance	Issue Adoption	Milestone/Key Tasks	Overall	Past ETCs	Risk Adoption	Schedule	Schedule Variance	Status Reporting	Unfilled Roles	Zero ETCs	Average
Clark, Patrick	0.0	1.0	2.0	5.0	0.0	0.0	0.0	1.4	0.0	1.0	0.0	0.0	0.0	5.0	5.0	1.4
Donegal, Amy	0.0	0.0	0.0	3.0	0.0	5.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	5.0	0.0	0.9
Granger, Paula	2.5	0.5	0.8	4.0	2.5	0.0	0.0	1.8	1.7	1.0	1.0	2.0	0.2	3.3	5.0	1.8
Lewis, Dana	5.0	3.0	0.0	5.0	5.0	0.0	1.0	3.0	5.0	1.0	3.0	1.0	3.7	5.0	5.0	3.0
Total	2.0	1.0	0.7	4.2	2.0	1.0	0.2	1.8	1.7	0.8	1.0	1.0	0.8	4.3	4.0	1.8

Project

Resource

Trend - Project

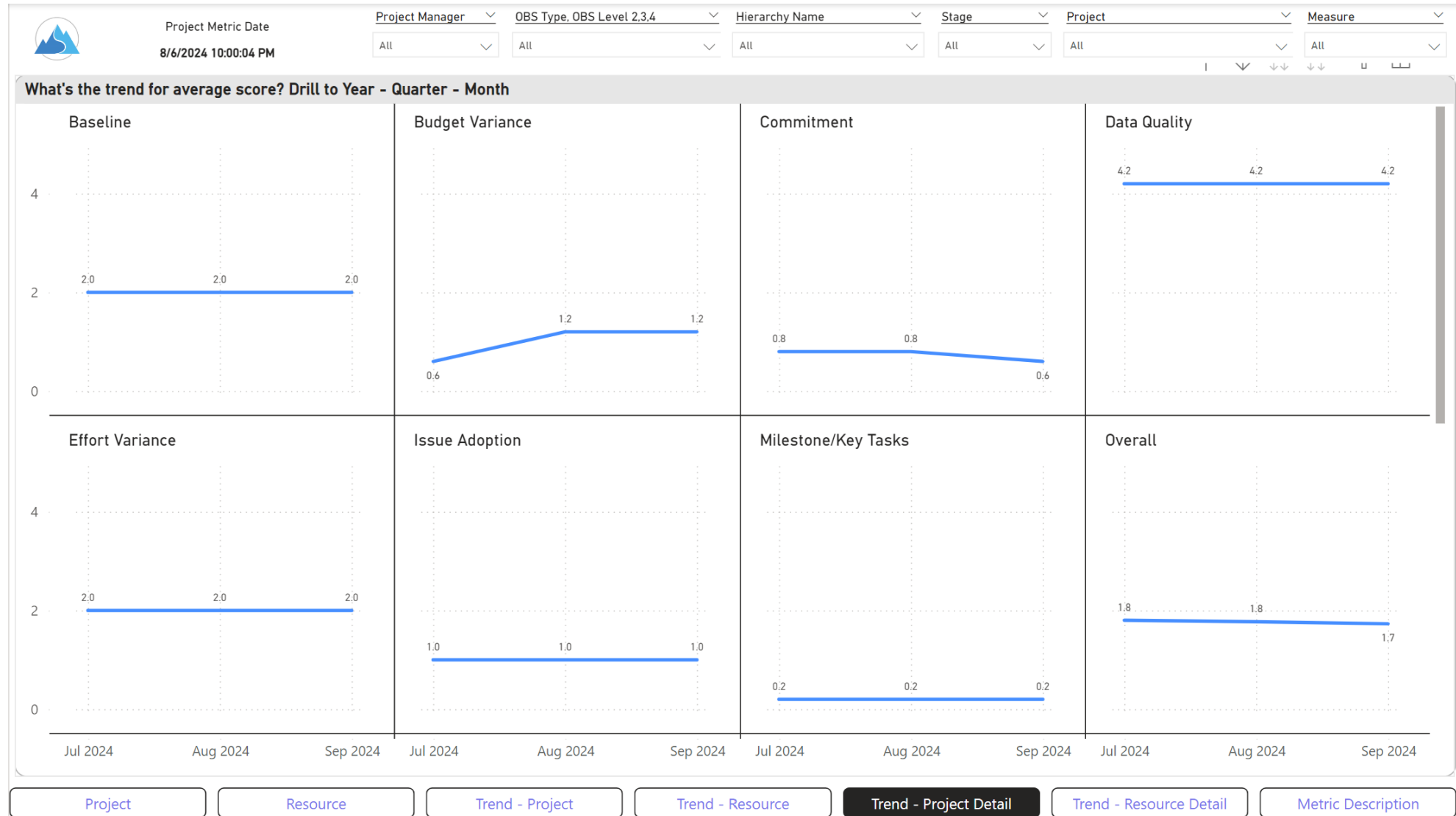
Trend - Resource

Trend - Project Detail

Trend - Resource Detail

Metric Description

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 Past	Are resources open for time entry but dates are in the past?
Resource CA PPM Usage	How often users are logging into CA PPM?
Resource Commitment	Provides a measurement for Hard Allocations of the resource over a 4-week time span.
Resource Data Quality	Has Resource Manager completed key fields in the resource record?
Resource Timesheet	Are timesheets getting posted in a timely manner?

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

Dark Theme

Dark Theme

