



# Power BI Ad Hoc | Beginner

Your Guides:  
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**Clarity™**  
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# Agenda

# Agenda

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- Power BI Overview
- Power BI Service Experience
  - Reports and Dashboards
  - Licensing and Sharing
- Power BI Developer Experience
  - Connect to Clarity Data
  - Transform and Model Data
  - Create and Embed a Report
- Additional Reporting Options

# Course Outline



## Overview

- What is Power BI
- Power BI Components
- Data Flow



## Creating a Report

- Power BI Desktop Navigation
- Creating a Simple Report Using Power BI Application
- Examples of Using Custom Visuals



## Data Transformation - Advanced

- Creating your own M script for your next advanced report
- M Script Examples



## Connecting to Data Sources

- Power BI Service Navigation
- Options to Connect to Sources
- Creating a Data Connection



## Data Import Options

- Connecting to ODATA and Oracle Server and Extracting Data
- Direct Query vs. Import



## Paginated Reporting

- Presentation Level Reports
- Use Cases



## Reports and Dashboards

- Dashboard Components
- Options to Share Reports and Dashboards



## Data Transformation

- Data Transformation Components
- Data Modeling

# Power BI Overview

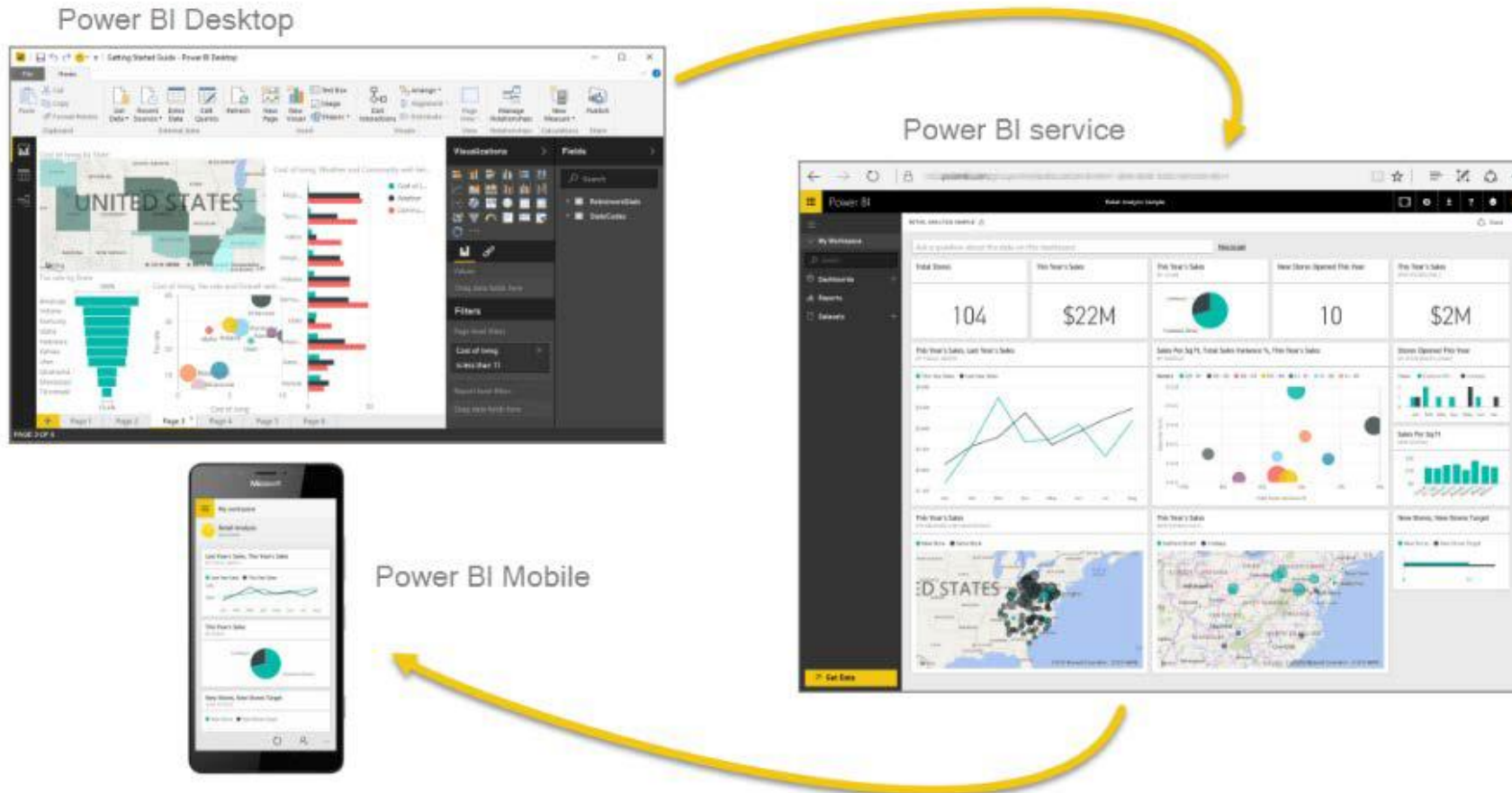
# What Is Power BI?

Power BI is a Business Intelligence and Visualization tool from Microsoft that lets you connect to a variety of data sources and create visually stunning and interactive dashboards.

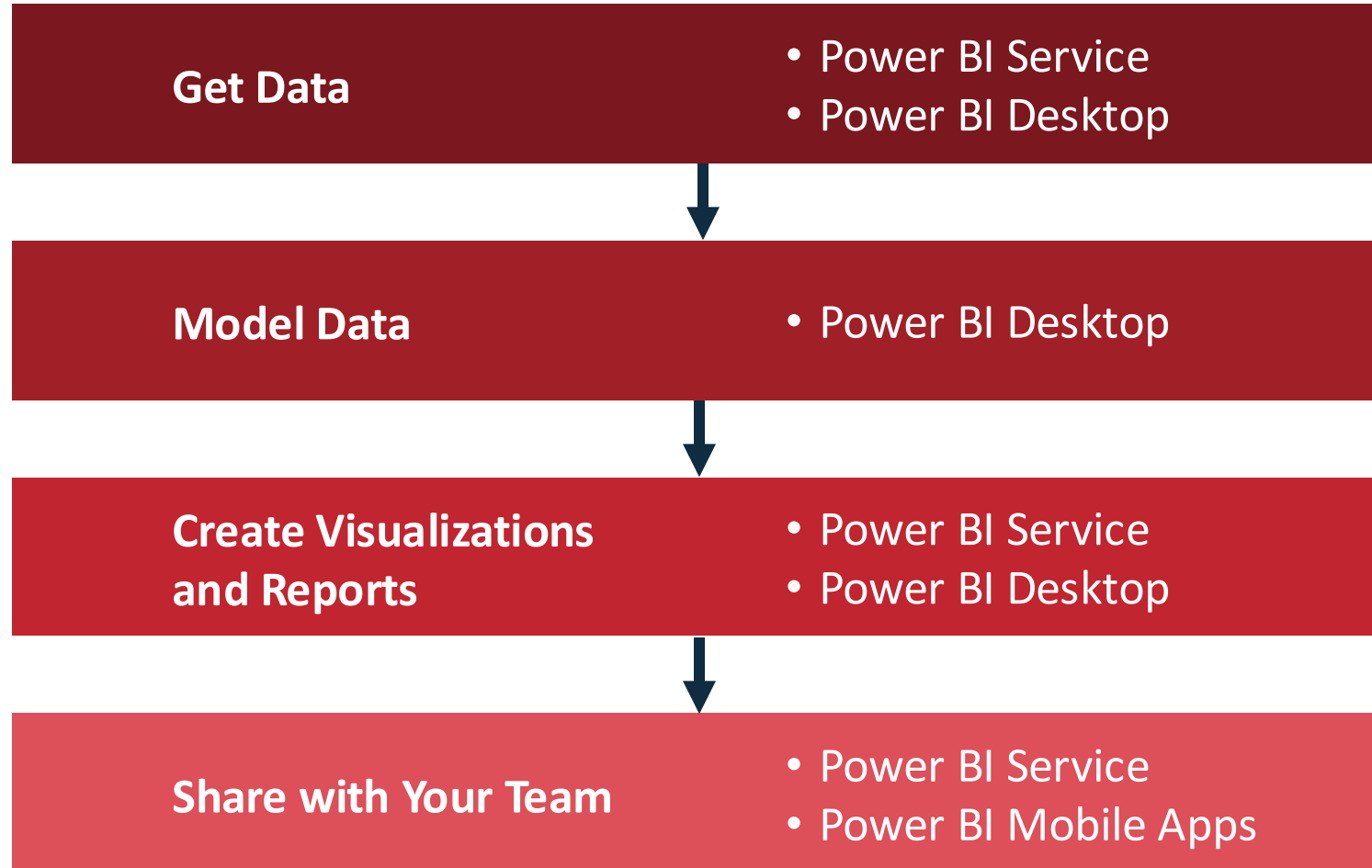


# Power BI Components

Power BI has three main components:



# Workflow



# Power BI Service Experience

# Power BI Service Navigation

10

Power BI My workspace

Search

Power BI trial: 58 days left

1

Home

Copilot

Create

OneLake catalog

Apps

Scorecards

Browse

Learn

Workspaces

My workspace

Power BI

Build your first report

Add and prepare your data

Generate a premade report

Customize to suit your needs

Add data to start building a report

Get Data

OneLake catalog

Excel

CSV

Paste or manually enter data

Pick a published semantic model

Don't see the source you're looking for? [Download the desktop app.](#)

Let Rego be your guide.

regoUniversity2026

# Menu Links



Home



**Home:** Your starting point for recent content, favorites, and recommendations in the Power BI service.



Copilot



**Copilot:** Use AI to find content, ask questions about data, and get summaries. Availability depends on your organization's settings and capacity.



Create



**Create:** Start a new report using existing data, or add data to build a semantic model. Available options depend on your permissions and license.



OneLake  
catalog



**OneLake catalog:** Find and explore data in your organization, including semantic models and other data items you have permission to use.

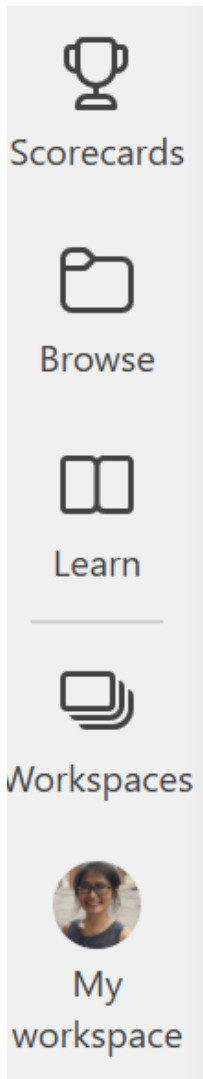


Apps



**Apps:** Open collections of reports and dashboards that your organization has packaged and shared with you.

# Menu Links



→ **Scorecards:** Track business goals and metrics in scorecards. Review progress, targets, and status in one place.

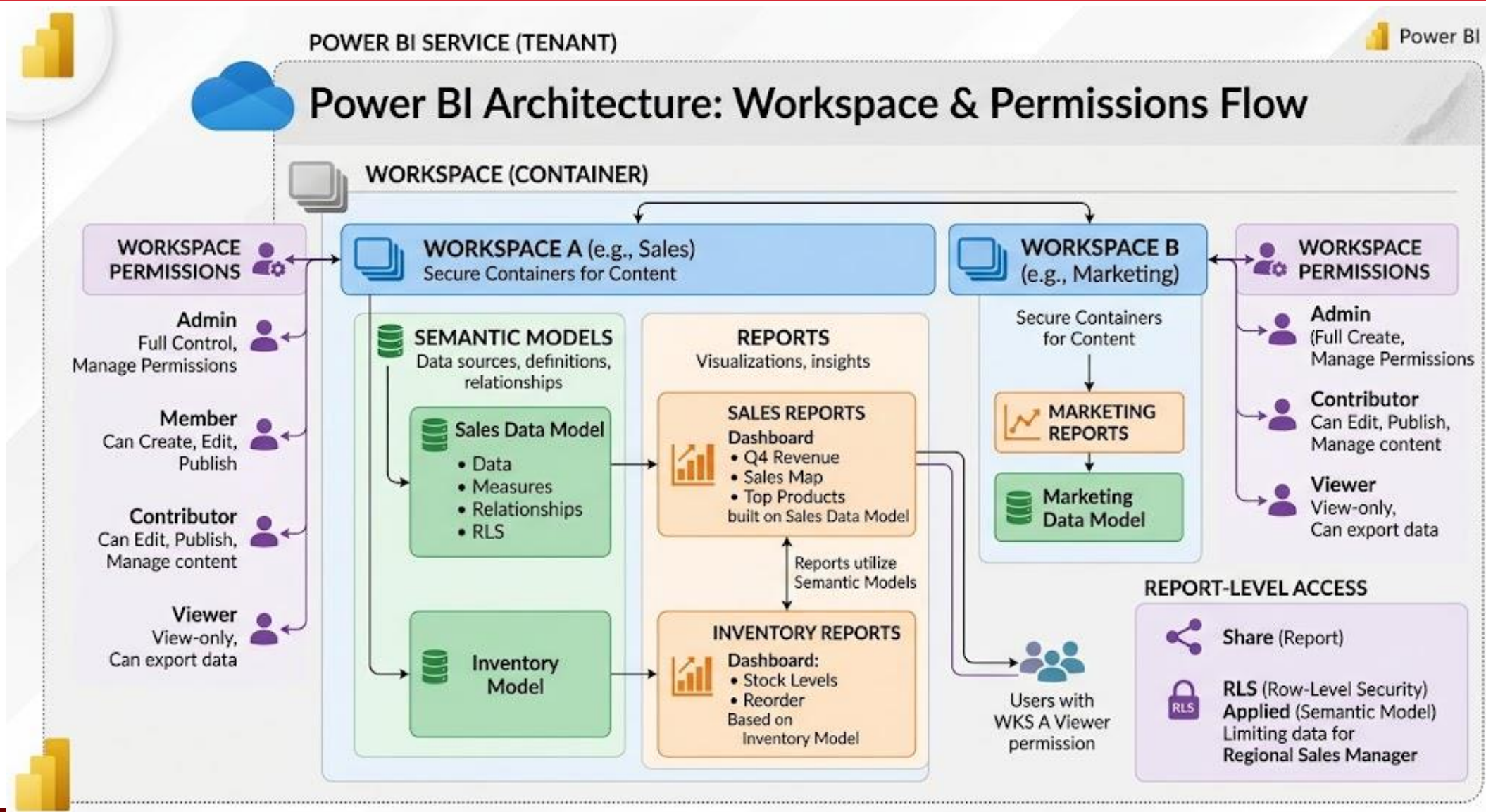
→ **Browse:** Find your recent items, favorites, and content that others have shared with you.

→ **Learn:** Access Power BI tutorials, samples, and training resources.

→ **Workspaces:** Collaborate with colleagues on reports and other Power BI content. Publish apps to distribute finished content to your audience.

→ **My workspace:** Your personal area for creating and organizing Power BI content, and for learning and experimenting.

# Power BI Service Architecture

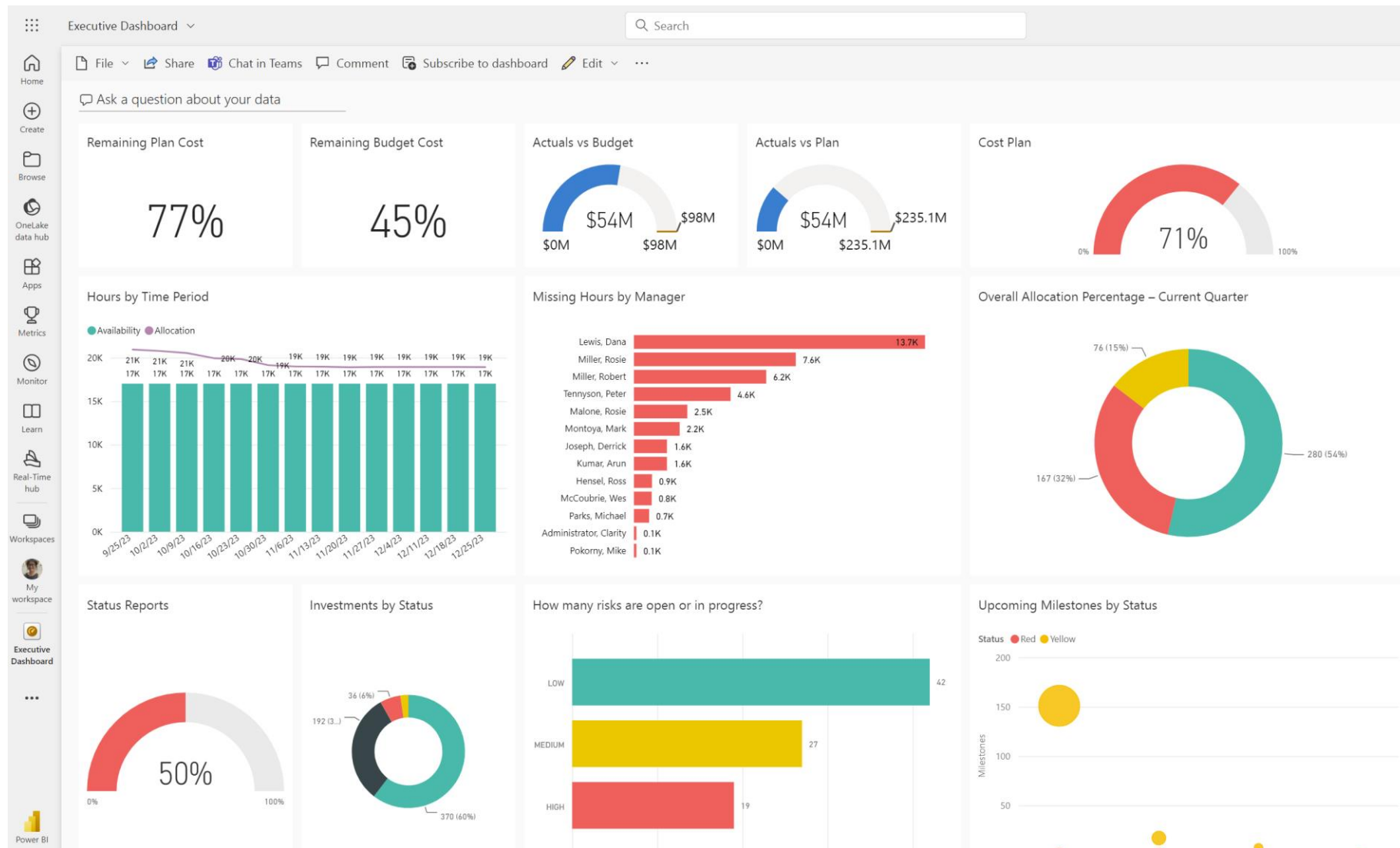


# Semantic Models, Reports and Dashboards

## Key differences

-  Semantic models represent the data's schema and data extraction. They are refreshed to make the latest data available, to be fed into reports.
-  Reports contain multiple pages of interactive visuals built from a semantic model. Dashboards are single-page views in the Power BI service.
-  A dashboard can combine selected visuals from multiple reports to present a concise view of key measures.

# Dashboard Example



# Sharing Reports and Dashboards



## Publish to Web

- Do not use this option. It makes the dashboard publicly accessible.



## Share an Individual Report

- Grant or revoke access to colleagues in the organization.
- Power BI warns you if you have entered an email address outside the organization.



## Share from Workspaces

- Editing or view-only access.



## Share from Apps

- Define audience groups.



## QR Code

- Easy access from mobile devices.

# Licensing

| Scenario                        | Creator                                | Viewer                                                                |
|---------------------------------|----------------------------------------|-----------------------------------------------------------------------|
| Personal use in my workspace    | Power BI Desktop and a free license    | Only the creator can access the content                               |
| Share from a standard workspace | Power BI Pro or Premium Per User (PPU) | Power BI Pro or PPU                                                   |
| Share from qualifying capacity  | Power BI Pro or PPU                    | Free users can view content hosted on Fabric F64+ or Premium capacity |
| Share a .PBIX file directly     | Power BI Desktop, no license           | Power BI Desktop, no license                                          |

# Data Connection Options

# Data Connection Options

Power BI can connect to Clarity via out-of-the-box (OOTB) connectors below:

- For hosted clients



OData Feed

- For on-premises clients



Oracle database  
Database



SQL Server database  
Database



PostgreSQL database  
Database

# Clarity OData Service

- OData can be enabled for hosted clients upon request:
  - Available for both Broadcom Google Cloud Platform (GCP) and Rego Amazon Web Services (AWS) clients
  - Broadcom OData connects to data warehouse (DWH)
  - Rego OData connects to both DWH and live database
- Related jobs:
  - Load Data Warehouse
  - Instantaneous Load Data Warehouse (NEW!)
  - Load Data Warehouse Access Rights
  - Refresh Data Warehouse OData Model

# OData Endpoint URL

If hosted by Broadcom on GCP:

General Settings

System Options

Site Links

Client Downloads

**Data Warehouse OData Service**

Mail Service

Localization

Integrations

Earned Value

Period De

Clarity PPM

Data Warehouse OData Service

Data Warehouse OData Service

DATA WAREHOUSE ODATA V2 ENDPOINT URL

<https://cppmbi2021.ondemand.ca.com/api/odata/cppm10108ddatasource>

DATA WAREHOUSE ODATA V4 ENDPOINT URL

<https://cppmbi2021.ondemand.ca.com/api/odata4/cppm10108ddatasourceV4>

ODATA AUTHENTICATOR

cppm10108ddwhbi

If hosted by Rego on AWS:

- OData v2: <https://OData-<environment>.<customer>.moventus.com/OData/api2>
- OData v4: <https://OData-<environment>.<customer>.moventus.com/OData/api4>
- Advanced endpoint for custom queries created in Rego OData Extension object: <https://OData-<environment>.<customer>.moventus.com/OData/ppmapi>

# Connecting to OData Feed

- In Power BI Desktop, select OData feed under Get Data
- Enter the OData URL, select basic authentication, and enter the username and password

OData feed

☒ Basic ☐ Advanced

URL

<https://cppmbi9000.ondemand.ca.com/api/odata/SC51829pDataSource>

OK

Cancel

OData feed

Anonymous  
Windows  
Basic  
Web API  
Organizational account

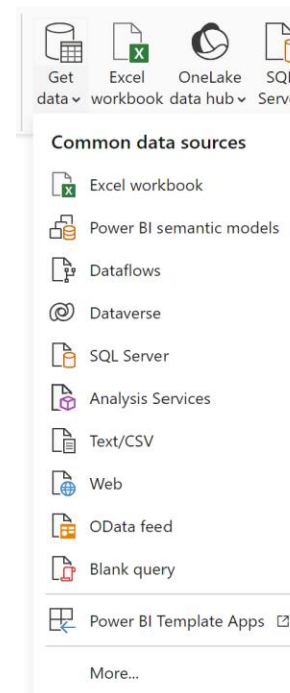
https://odata-opp03.rego-internal.moventus.com/o...

User name  
odata\_user

Password  
•••••

Select which level to apply these settings to  
https://odata-opp03.rego-internal.moventus.com/odata/api4

Connect Cancel



- OData Table Navigator opens. Select the tables required for your dashboard and click on Load

Navigator

Display Options

☒ DWH\_INV\_INVESTMENT

☐ DWH\_INV\_INVESTMENT\_LN

☐ DWH\_INV\_OBS\_MAPPING

☐ DWH\_INV\_OTHER\_WORK

☐ DWH\_INV\_OTHER\_WORK\_LN

☐ DWH\_INV\_PER\_FACTS\_F V

DWH\_INV\_INVESTMENT

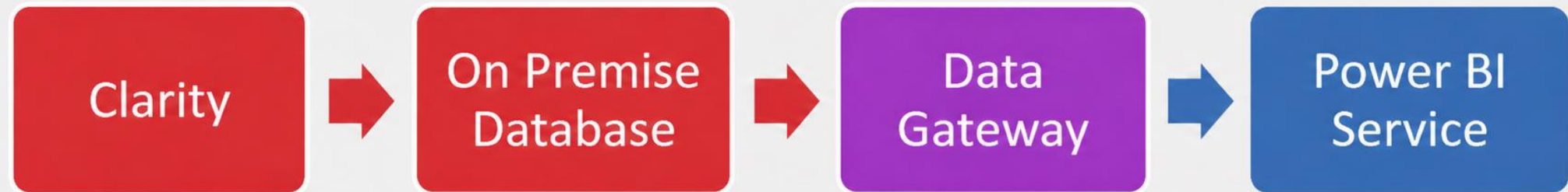
Preview downloaded on Wednesday

| INVESTMENT_KEY | CLARITY_INVESTMENT_KEY | INVESTMENT_ID | INVESTMENT_NAME          |
|----------------|------------------------|---------------|--------------------------|
| 5006027        | 5006027                | IDA00275      | Annual Benefit Changes I |
| 5006029        | 5006029                | IDA00277      | Annual PPO Network Che   |
| 5006030        | 5006030                | IDA00279      | Medicare Advantage Plar  |
| 5006032        | 5006032                | IDA00307      | New HRA vendor           |

The data in the preview has been truncated due to size limits.

# Data Refresh Options

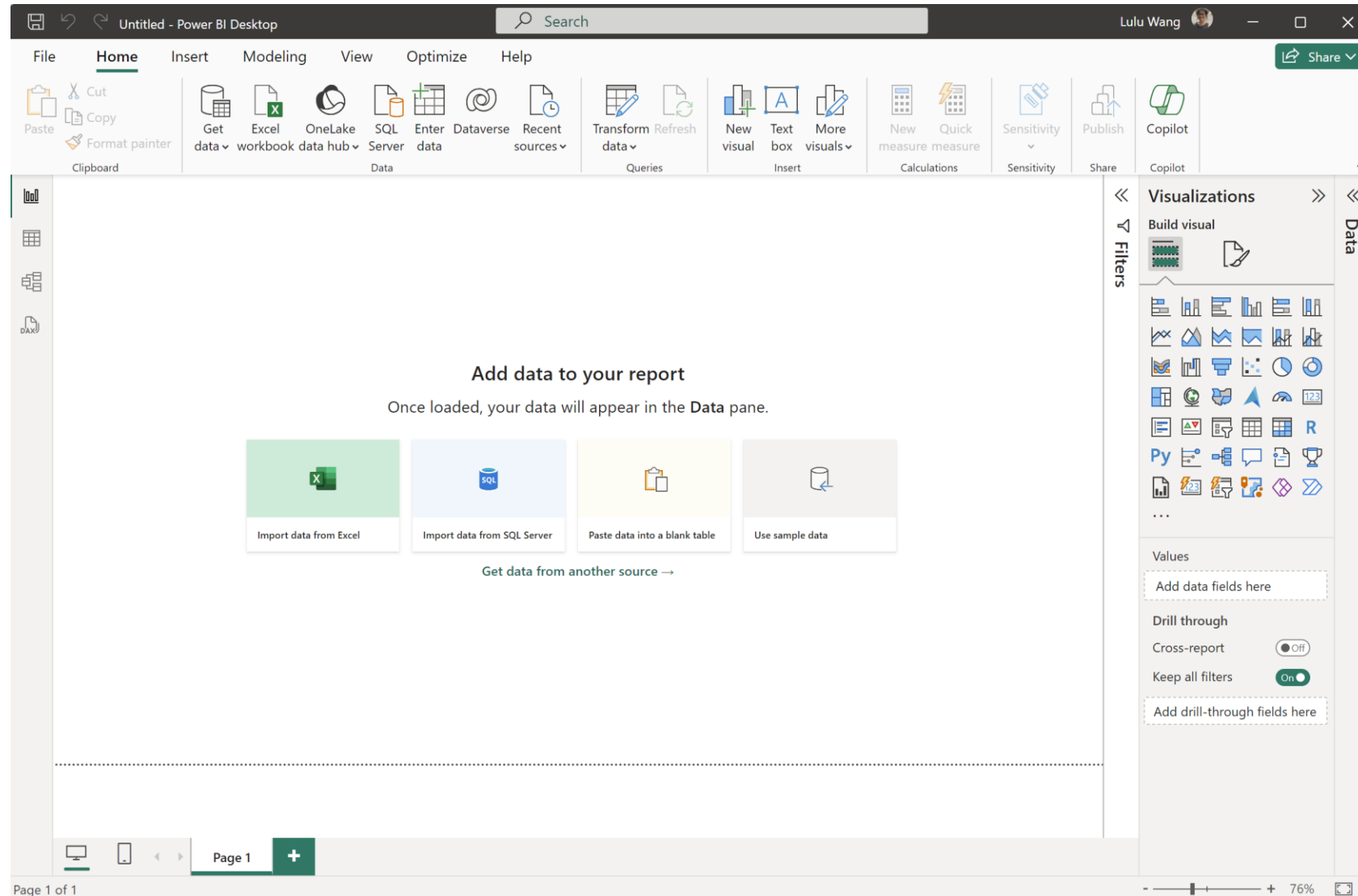
23



# Power BI Developer Experience

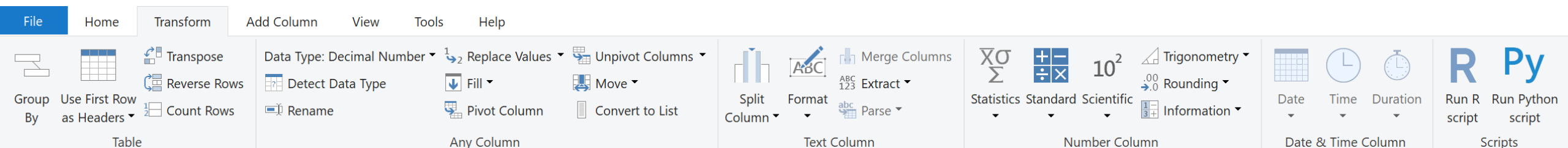
# Power BI Desktop UI

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# Common Data Transformations

- Remove fields, rename fields, and change data type
- Split or concatenate fields
- Replace null values with blanks
- Group data
- Pivot or unpivot columns
- Apply aggregate functions
- Format columns
- etc.



# Data Transformation

After importing multiple tabs from Excel or creating multiple queries from the Clarity database, navigate to Model view to create relationships between tables.

The screenshot displays the Rego model view with three tables and their relationships.

**Resource Weekly Facts**

- Σ ACTUAL\_COST
- Σ ACTUAL\_HOURS
- Σ ACWP\_COST
- Σ ALLOC\_COST
- Σ ALLOC\_EAC\_COST\_VAR
- Σ ALLOC\_EAC\_HOURS\_VAR
- Σ ALLOC\_HOURS
- Σ AVAIL\_ALLOC\_HOURS\_PCT
- Σ AVAIL\_ALLOC\_HOURS\_VAR
- Collapse ^

**Resource Detail**

- BOOKING\_MANAGER
- Σ BOOKING\_MANAGER\_KEY
- CATEGORY
- CLARITY\_CREATED\_DATE
- Σ CLARITY\_RESOURCE\_KEY
- CLARITY\_UPDATED\_DATE
- CLR\_EXPERIENCE
- Σ COMPANY\_KEY
- COMPANY\_NAME
- Collapse ^

**Resource OBS**

- CLARITY\_CREATED\_DATE
- Σ CLARITY\_OBS\_MAPPING\_KEY
- CLARITY\_UPDATED\_DATE
- DW\_UPDATED\_DATE
- Σ HIERARCHY\_LEVEL
- OBS\_LEVEL1
- Σ OBS\_LEVEL1\_KEY
- OBS\_LEVEL10
- Σ OBS\_LEVEL10\_KEY
- Collapse ^

**Relationships:**

- Resource Detail (1) to Resource OBS (\*)
- Resource Weekly Facts (\*) to Resource Detail (1)

**Properties**

Relationship

Table: Resource OBS, Column: RESOURCE\_KEY

Cardinality: Many to one (\*:1)

Table: Resource Detail, Column: RESOURCE\_KEY

Make this relationship active: ☒ Yes

Cross-filter direction: Single

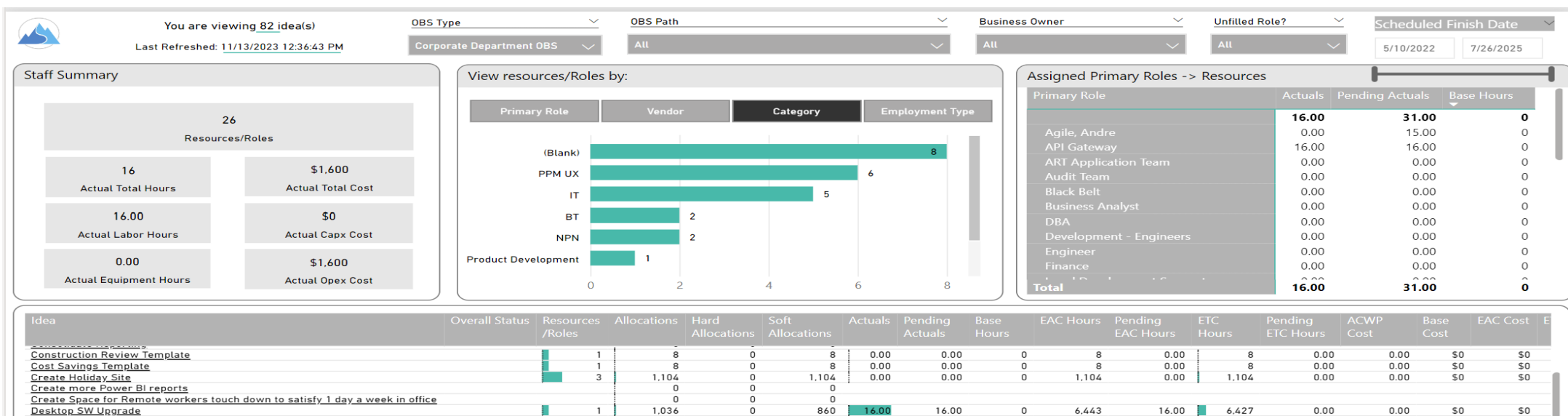
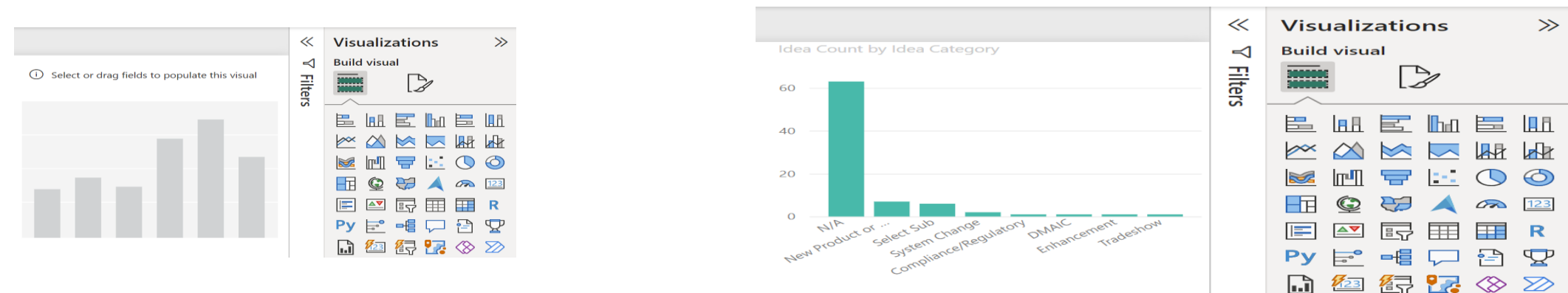
Apply security filter in both directions: ☐ No

Apply changes

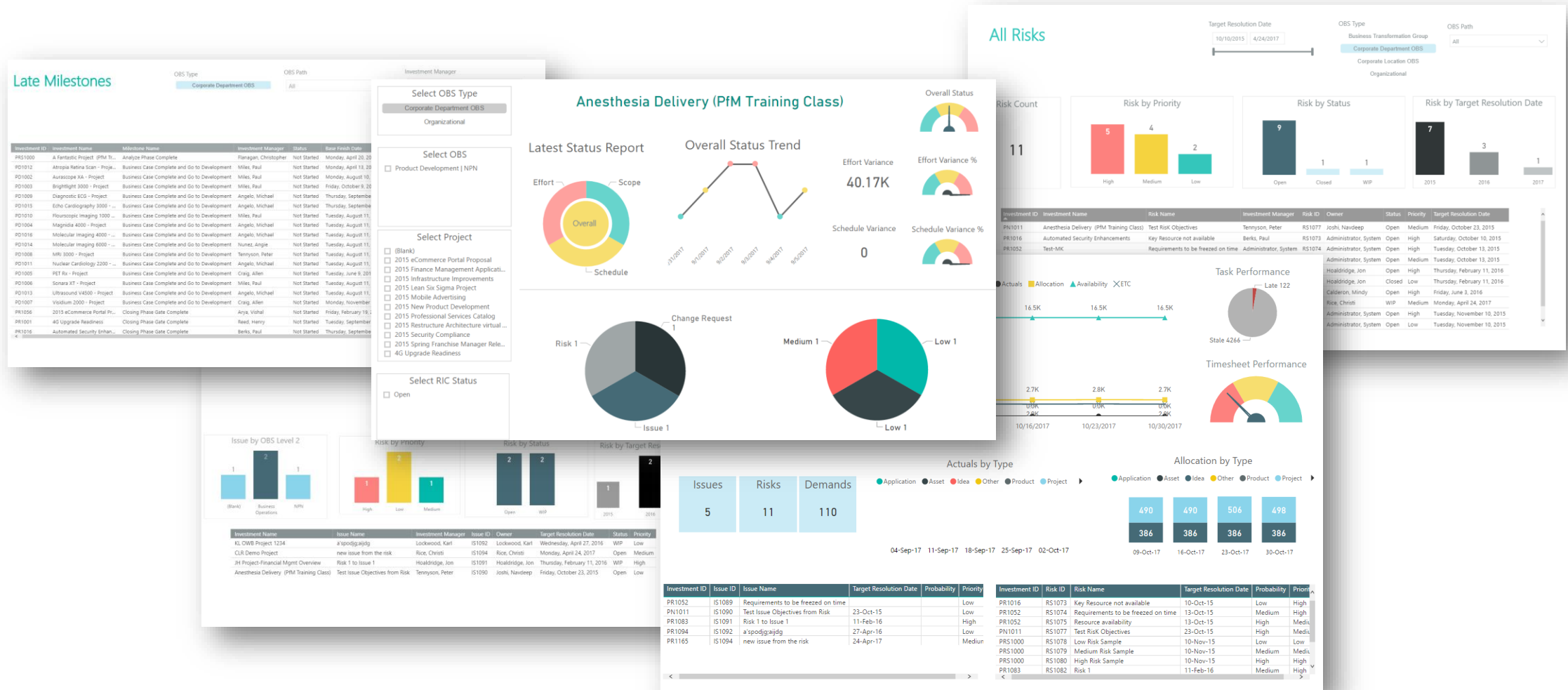
Open relationship editor

# Creating a Report

Select a visualization, add fields, arrange the visuals, and save the report.



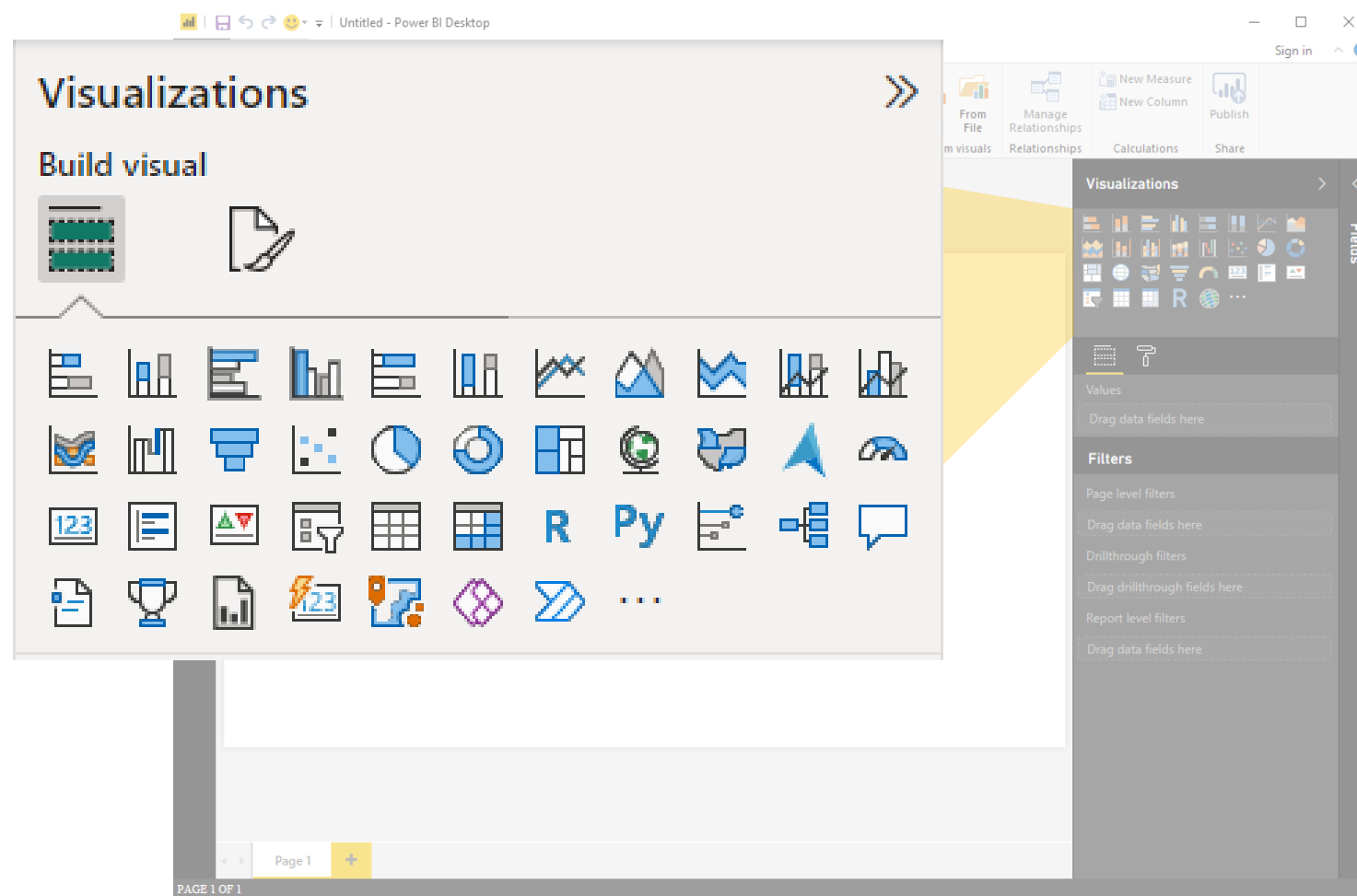
# Creating a Report (Cont.)



# Choosing Visuals

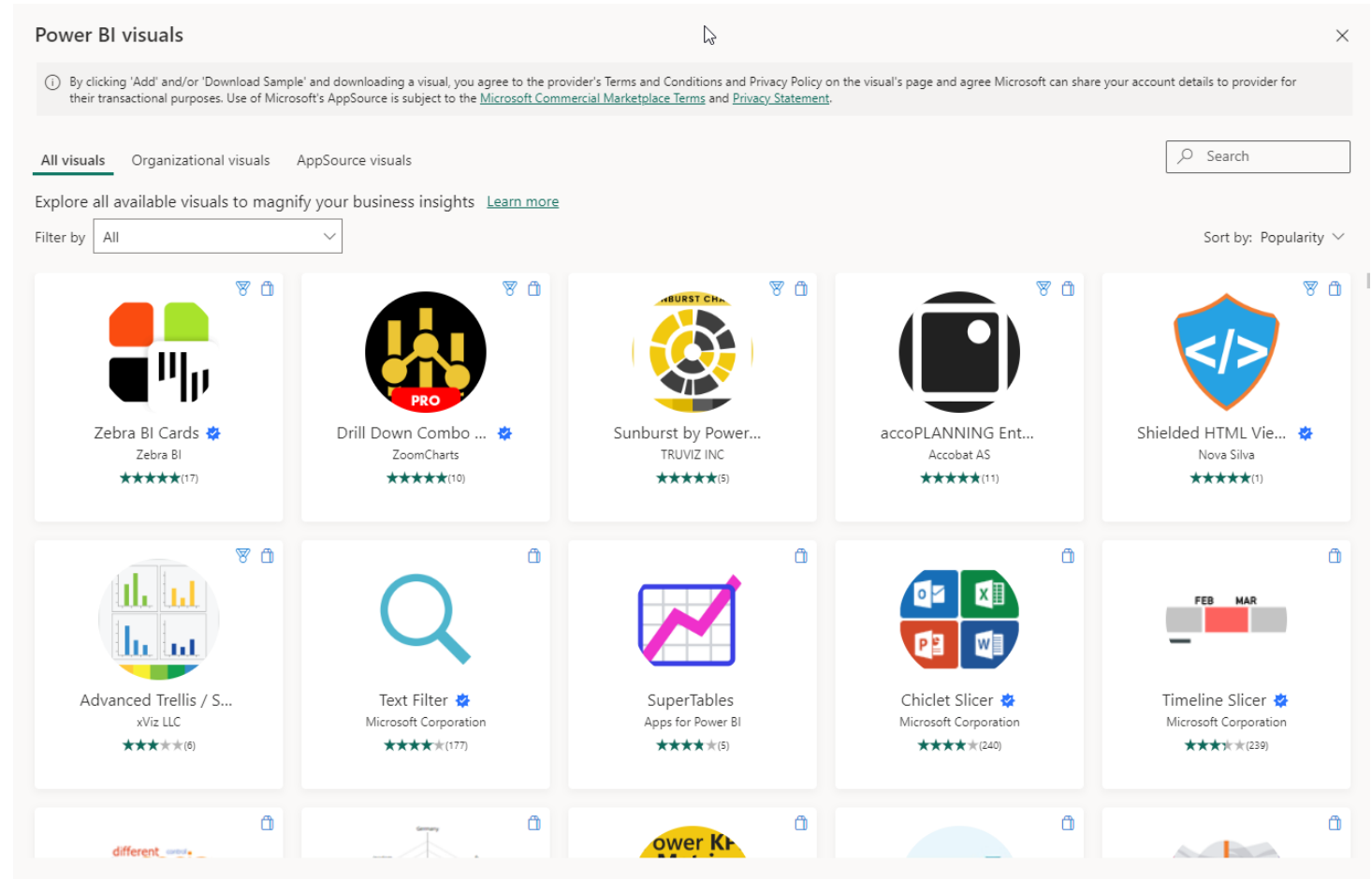
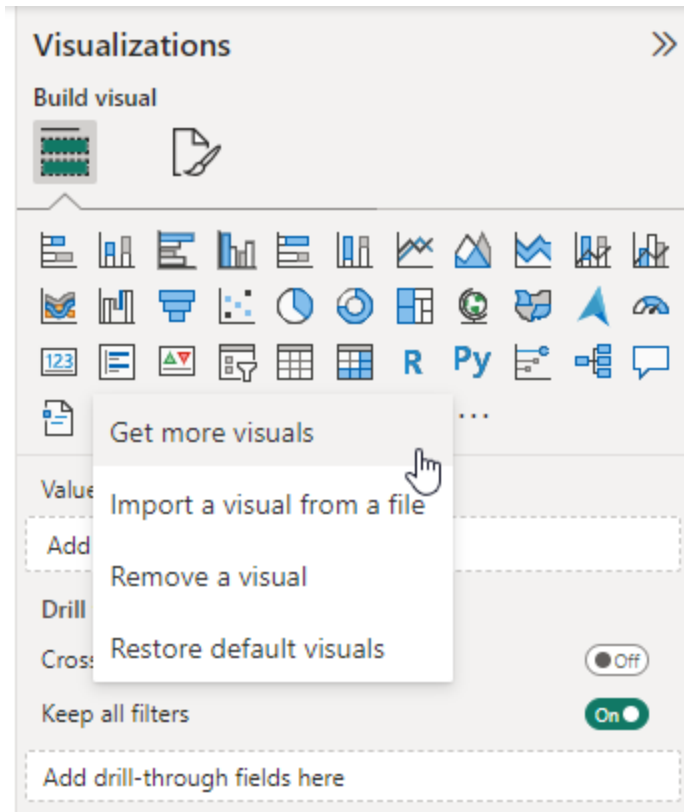
Match the visual to the question:

- Status: Bar or column chart
- Budget: Clustered bar or column chart
- Trend: Line chart
- Details: Table or matrix



# Custom Visuals

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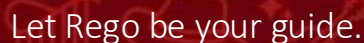


# Data Transformation – Advanced



Create custom data transformations with Power Query M for your next advanced report

# M Script Examples



# Power BI Paginated Reports

# Paginated Reports

A Power BI paginated report is designed to be printed or exported compared to the default interactive UI. You can create pixel-perfect reports with many pages of the same layout.

File Export 560 of 563 Parameters

Buying Group: Tailspin Toys Location: Absecon, NJ, Aceituna... View Report

Invoices From Date: 05/01/2016 Invoices To Date: 05/31/2016

**Buying Group Account Statement**

Invoice Range: May 01, 2016 to May 31, 2016

Buying Group: Tailspin Toys, 201 Customers Selected

Floor 20, Import Plaza  
105 Silk Road  
Tradesville  
WA 99999

Wide World Importers

**Invoice No: 73507-70431**

Invoice 2 of 3

Invoice Date: May 31, 2016 Delivery Time:  
Purchase Order No: 16826 Received By:  
Billed To: Tailspin Toys (Head Office)  
Delivery Information: Suite 150, 1959 Sarma Road

| Item                                                | Quantity | Unit Price | Tax             | LineTotal         |
|-----------------------------------------------------|----------|------------|-----------------|-------------------|
| DBA joke mug - you might be a DBA if (White)        | 7        | \$13.00    | \$13.65         | \$104.65          |
| Ogre battery-powered slippers (Green) XL            | 8        | \$32.00    | \$38.40         | \$294.40          |
| Packing knife with metal insert blade (Yellow) 18mm | 15       | \$2.40     | \$5.40          | \$41.40           |
| "The Gu" red shirt XML tag t-shirt (White) 3XS      | 48       | \$18.00    | \$129.60        | \$993.60          |
| <b>TOTAL</b>                                        |          |            | <b>\$187.05</b> | <b>\$1,434.05</b> |

# Use Cases

- ✓ Email project summaries for each program. Include all projects in that program together.
- ✓ Export a list of Red projects each week. As the number of projects changes, add pages as needed.
- ✓ Integrate a paginated report with Power BI report using parameters.
  - ✓ Insert a paginated report into a Power BI report for export
    - 150,00 row limit
  - ✓ Add a hyperlink in a paginated report that opens a detailed Power BI report, filtered to the relevant record

# Embed a Report

# Sharing and Embedding a Report

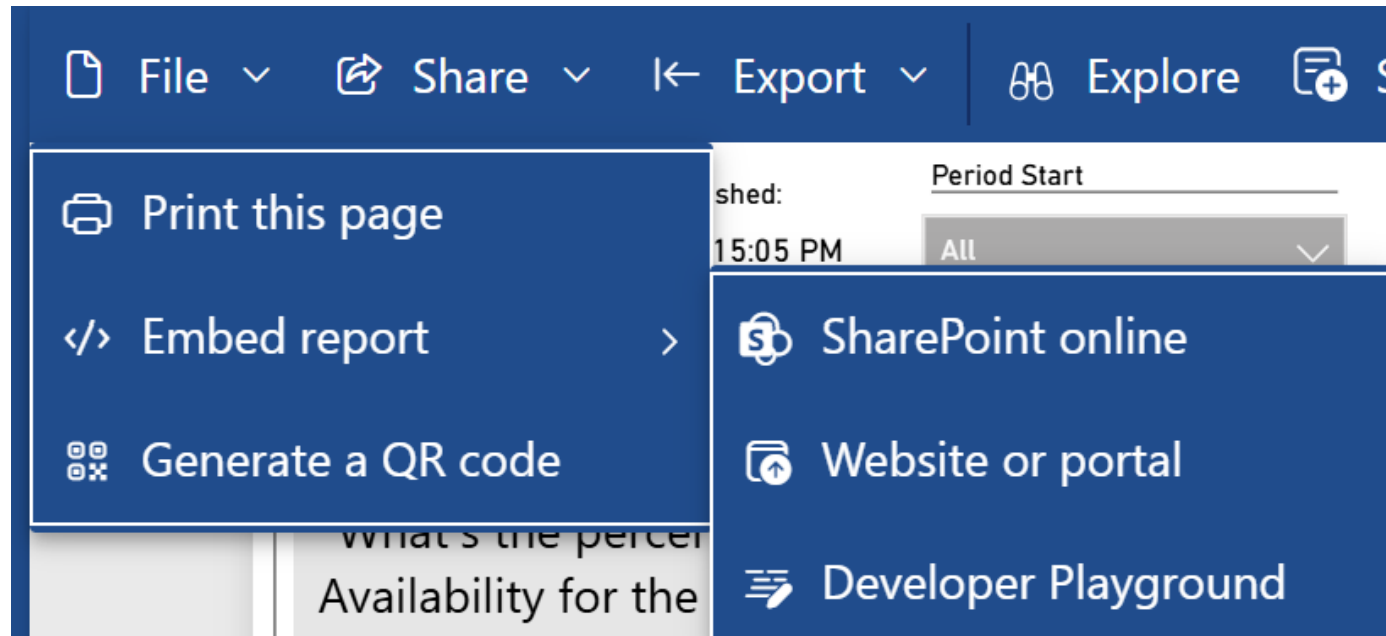
- To add a Power BI report into Clarity, copy its sharing URL into a blueprint.

Note: Share for Organizations to ensure security and login apply. We advice against public sharing in any way

- Reports can be embedded as:
  - A page.
  - A navigation menu icon.
  - A subtab within a blueprint. For example, a project subtab.

# Embed URL

To get the embed URL, navigate to a Power BI report in a Power BI app or workspace, click File > Embed report > Website or Portal.



# Embed as Page

To embed a published report as a page, navigate to Administration > Blueprints > Create or modify a blueprint, and set Type to Page.

|                          | Name * 2↑       | Type * |
|--------------------------|-----------------|--------|
| <input type="checkbox"/> | Page - Power BI | Page   |

Click into the blueprint, and add a new Channel Module.

Properties

Modules

Rules

Modules ×

Q Search...

Add modules

New Channel

New Canvas

Report

# Embed as Page (Cont.)

In the Configure section, type in the Channel Name, paste the embed URL, and publish the blueprint.

## Configure - Adoption Dashboard

Channel Name \*

Adoption Dashboard|

Channel Url \*

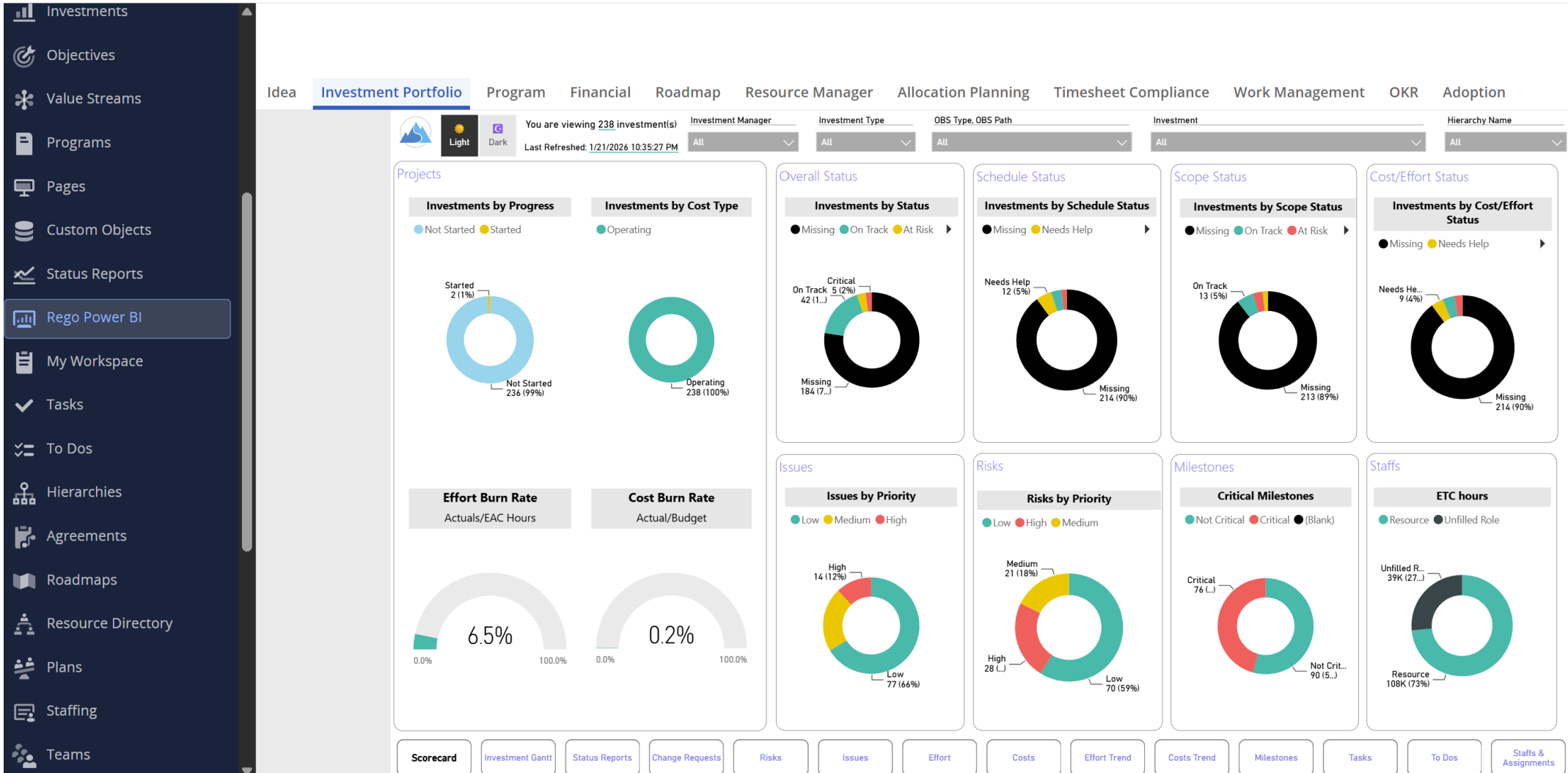
<https://app.powerbi.com/view?r=eyJrljoiODgyODE3YmEtYTMxYS00YWU2LWE3NjYtZDYxZGVmMmE0OGU...>

When this blueprint is used for a page, the configured dashboard appears on that page.

# Embed a Report (Cont.)

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clarity



# Navigation Menu Icon

To embed a report as a navigation menu icon, navigate to Administration > System Settings > Navigation Menu.

Administration ▶

**System Settings**

Branding

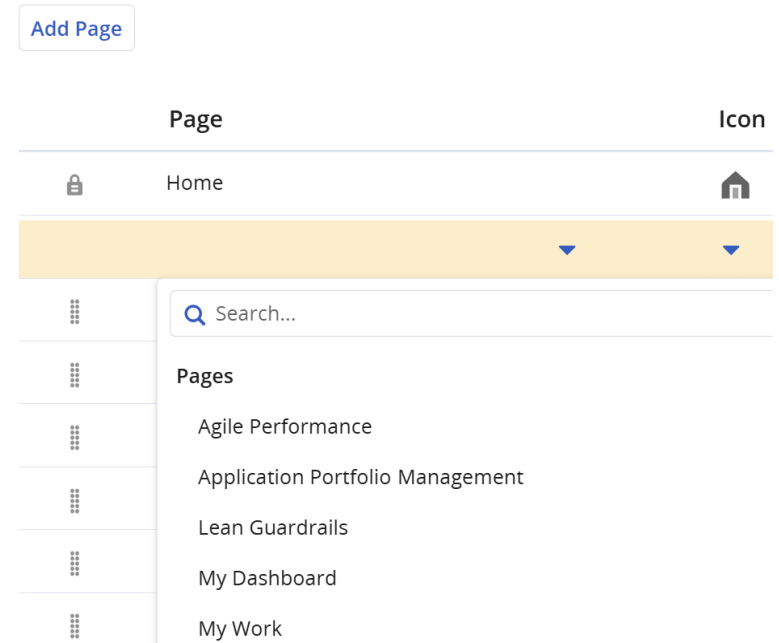
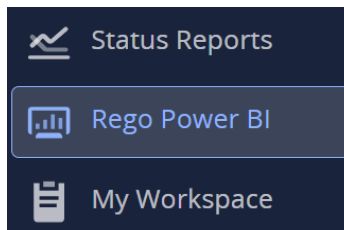
Login Message

Homepage

**Navigation Menu**

Add a page, scroll to the Pages section, and select a report from the dropdown.

The report appears on the left navigation menu.



# Embed with Parameters

A Power BI report can be embedded as a subpage with parameters.

- For example, a Project Storyboard report can be embedded to the project blueprint, with a filter to show only that project's content

Navigate to the blueprint, e.g. a Project blueprint, then follow the steps described in 'Embed as Page.'

When configuring the Channel URL, after pasting the embed URL, append this filter string:

*&\$filter=[YOUR\_TABLE]/[YOUR\_KEY\_COLUMN] eq \${\_internalId}*

# The Rego Ways



# DO's



# DON'T's

- ✓ Organize semantic models by business area i.e., Resource Management, Project and Portfolio, Financials, etc.
- ✓ Remove unused fields and use clean, easy to identify names
- ✓ Use data source parameters for easier maintenance and migrations
- ✓ Separate dimension and fact tables
- ✓ Use templates and consistent layouts
- ✓ Validate data, calculations and totals

- ✗ Do not replicate all tables, be mindful of the complex schema in Clarity and risks of high amount of data
- ✗ Don't turn on bi-directional filtering without understanding the impact
- ✗ Don't use custom visuals, apps or add-ins without IT approval
- ✗ Don't use inconsistent color codes or formatting across pages
- ✗ Don't hide key insights or reports behind too many clicks

**Keep it simple, keep it clean, build for the question**

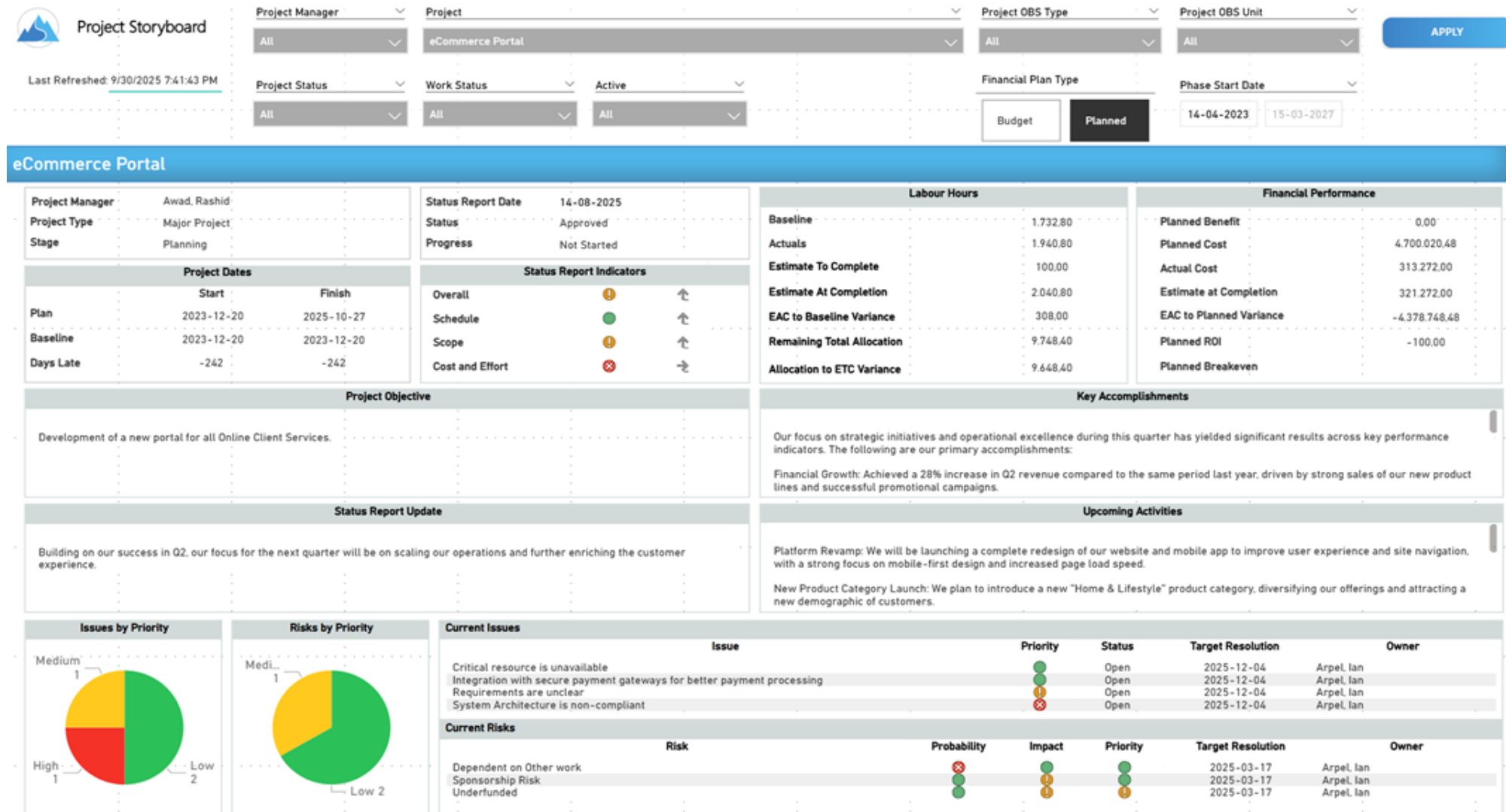
# Rego Assets

- Rego Power BI Reports
  - Suite of **free, pre-built** Power BI dashboards
  - Customizable to meet specific organizational needs
- Rego Power BI SaaS
  - Secure hosting service to integrate PowerBI seamlessly with Clarity
  - Fully managed services with end-to-end implementation
- Rego Odata Extension (AWS Only)
  - Define custom odata feeds
  - Provides access to clarity data (transactional db)
- Rego Data Extractor
  - Extract large datasets
  - Clarity or DWH data

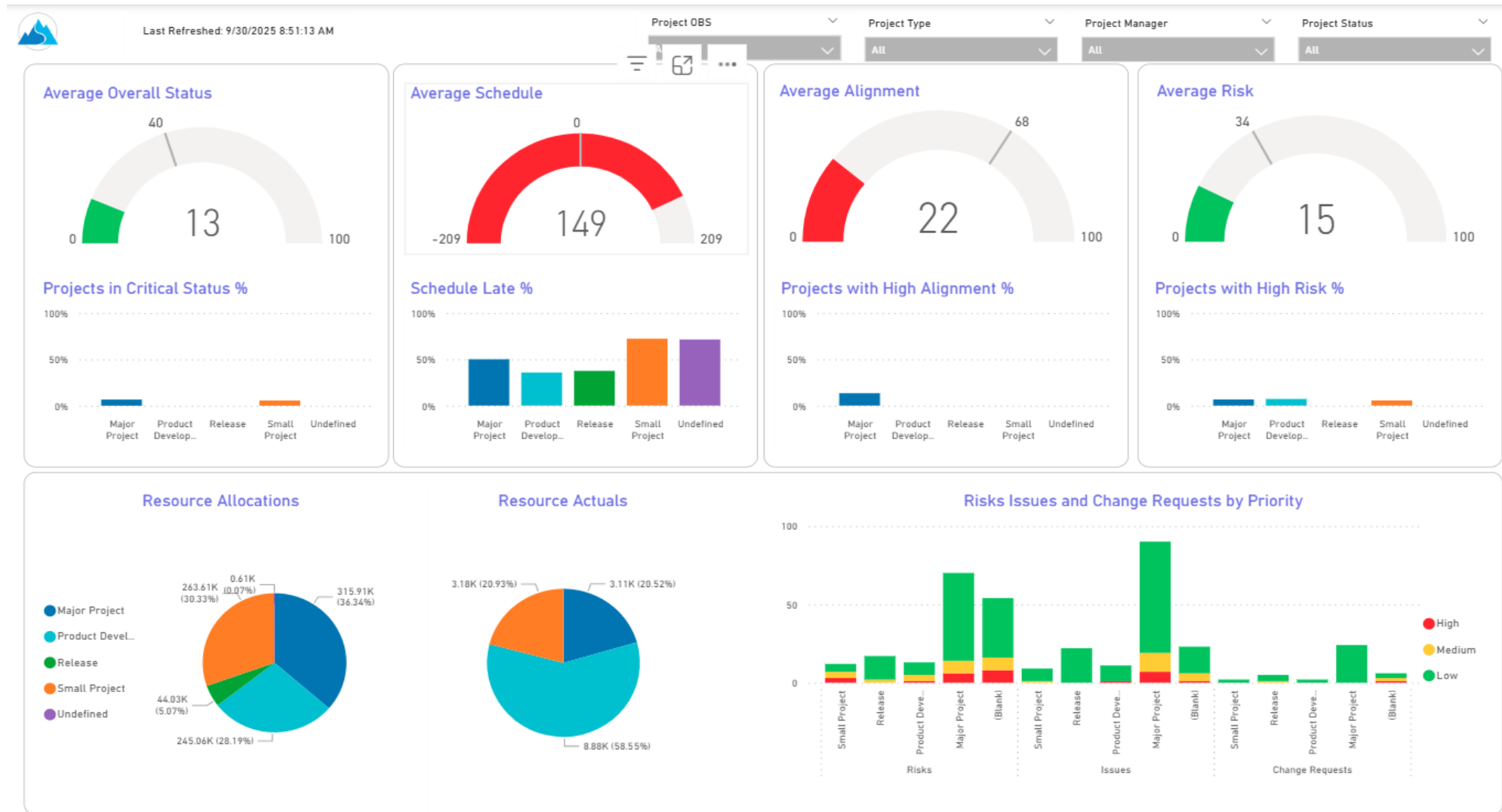
# Rego Power BI Reporting Suite

| 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. |

# Project Storyboard



# KPIs by Project Type (Dashboard)



# Project Cost and Effort



## Project Cost and Effort

Last Refreshed: 4/24/2026 10:38:07 AM

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 % |
|-----------------------------------------|--------------|-------------|--------------|-------------------------|---------------------------|-----------|--------------|-----------|---------------------------|-----------------------------|
| <b>ABLE Payments</b>                    | 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                      |                             |

# Capacity vs. Demand by Resource



You are viewing 155 resource(s)

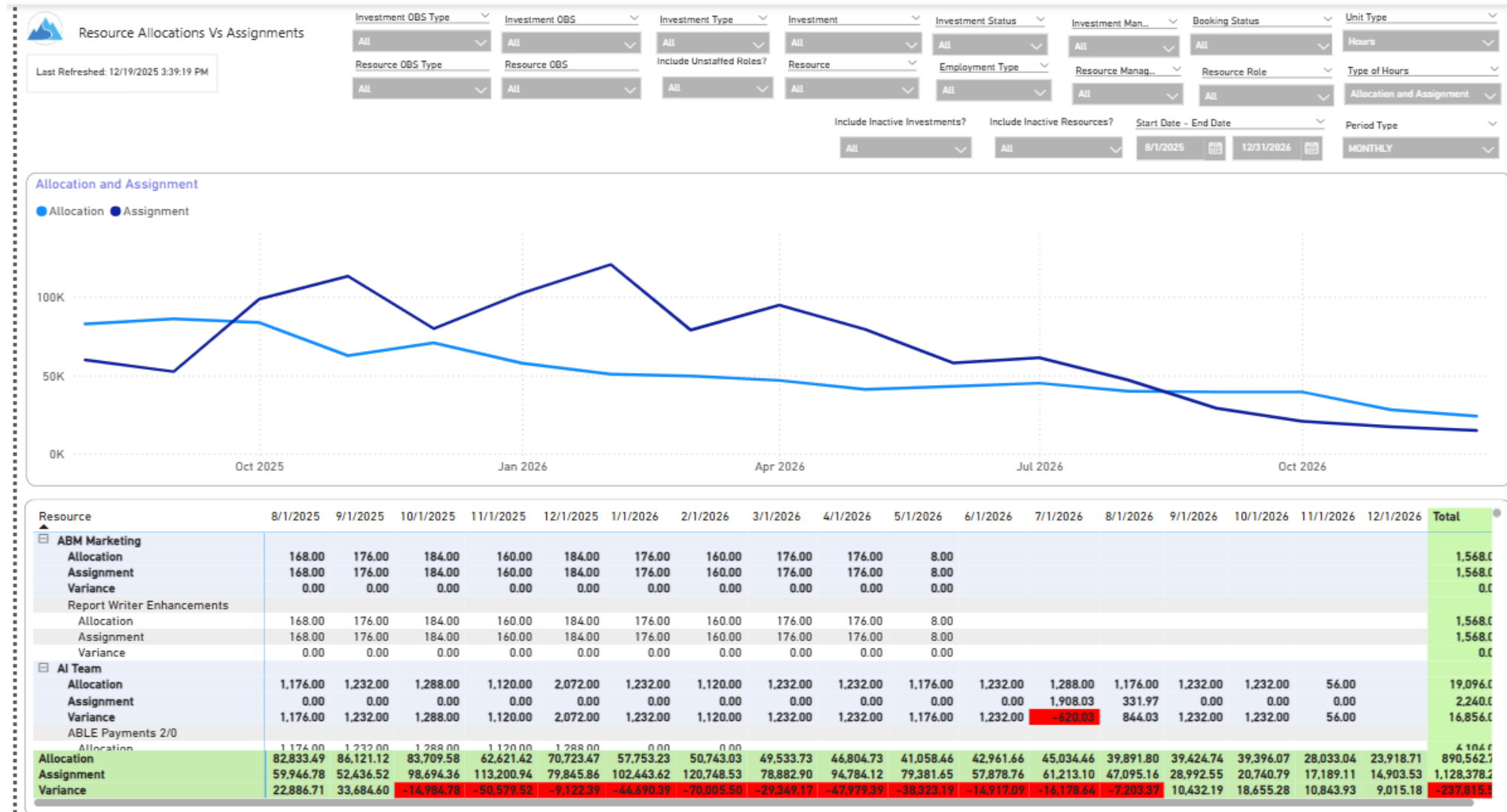
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## Capacity vs Demand by Resource

|                            |                            |                               |                                        |                          |
|----------------------------|----------------------------|-------------------------------|----------------------------------------|--------------------------|
| Resource OBS Type<br>All   | Resource OBS Unit<br>All   | Resource Manager<br>All       | Booking Manager<br>All                 | Resource Role<br>All     |
| Resource<br>All            | Employment Type<br>All     | Resource Status<br>Active     | Booking Status<br>All                  | Investment Status<br>All |
| Investment OBS Type<br>All | Investment OBS Unit<br>All | Period Type<br>Monthly Weekly | Type Of Hours<br>Allocation Assignment | Unit Type<br>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  |

# Resource Allocations and Assignments



# Questions?



## Survey



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Artificial  
Intelligence (AI)



Reporting &  
Analytics



Technical



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- 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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- Click on **I agree** and **Submit**



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