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Roadmap Management— OOTB Introduction Your Guides: Mindy Calderon, Alyson Poston, and Jonathan Borden

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



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Overview

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Purpose of Roadmaps

Roadmaps allow organizations to maximize the value of initiatives and minimize risks by prioritizing and selecting investments that most closely align with corporate goals and realize estimated cost and ROI

- Roadmaps help organizations achieve one or more organizational strategies
- May consist of past, current, and planned or future components
- Potentially longer term, with new investments rotating into the Roadmap
- An organization likely has many Roadmaps, each addressing unique organizational needs
- Roadmaps may contain Ideas, Projects and custom Investments. No Programs or NPIOs





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Portfolios vs Roadmaps



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Roadmaps vs. Portfolios – General

| | Classic | 15.5.0 | 15.5.1 | 15.6 | 15.6.1 | 15.7 |
|------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|---------------|---------------------------------------|--------|------|
| | Portfolios | | | Roadmaps | | |
| Can include Projects | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Can include Programs | Image: A second s | | | | | |
| Can include OOTB Ideas | ✓ | | | ✓ | ✓ | ~ |
| Can include NPIOs | Image: A second s | | | | | |
| Can include Custom Investments (New UX Only) | | | | ~ | • | |
| Can add items by OBS | ~ | ✓ | ✓ | ✓ | ✓ | |
| Can add items by Name | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Can add items using other filter criteria (e.g., Manager, Power Filter, etc.) | Image: A second s | | | | | |
| Can manually add/include items that don't exist elsewhere in Clarity PPM | | | | ✓ | | |
| Can sync data from Investments – OOTB Fields | ✓ | Financials, | Dates, Availa | bility only | | |
| Can sync data from Investments – Custom Fields | ~ | | | *known defect | ~ | ~ |
| Can associate with OBS, and use OBS for Security | ✓ | | | ✓ | ✓ | ✓ |
| Can schedule Sync of included items, instead of having to sync manually to update Investment data | ✓ | | | | | |
| Will continue to be enhanced in future Clarity PPM Releases | | | | ✓ | | |

Roadmaps vs. Portfolios– Analysis

| | Classic | 15.5.0 | 15.5.1 | 15.6 | 15.6.1 | 15.7 |
|--------------------------------------------------------------------------------------------------------|-----------------------|----------|-----------------|-----------------------|-------------|------|
| | Portfolios | | | Roadmaps | | |
| Supports analysis using Fiscal Time periods | | | | ~ | | |
| Can set Targets | ✓ | ✓ | ✓ | ~ | ✓ | ~ |
| Can distribute targets as desired across time horizon | ✓ | | | | | |
| Can delineate between Targets (do not exceed) and Goals (target to hit, e.g., Benefits) | ✓ | ✓ | ✓ | ~ | ~ | ~ |
| Includes Waterlining functionality | ✓ | 🗸 Via Ta | rgets/In Plan o | checkbox | | |
| Can create and save scenarios | ✓ | ✓ | ✓ | ~ | ✓ | ~ |
| Can create different views | | | | ✓ | | |
| Provides a Grid View | ✓ | | | ~ | ✓ | ~ |
| Provides a Timeline View | ✓ | | | ~ | ✓ | ~ |
| Provides a Board View | | | | ✓ | | |
| Includes Ranking Rules | ✓ | | | | | |
| Can analyze by individual/specific roles | ✓ | | | | | |
| Can group and utilize color to analyze data | | | | ✓ | | |
| Can make modifications to Investment data within the Roadmap/portfolio (e.g., Dates, financials, etc.) | ~ | ~ | ~ | ~ | ~ | ~ |
| Can push the above changes back to the underlying Investment | | | | | | |
| Additional OOTB Reporting on data – Portlets, reports, etc. | ✓ | | | Some ligh | t reporting | |



Data Used in Roadmaps

- Roadmaps use:
 - Investment Data
 - Planned Costs (simple budget or cost plans)
 - Resource Demand (allocations)
- Minimum data needed:
 - Simple: Investment Data Simple grouping of projects
 - Medium: Grouping of projects with either planned cost or resource data
 - High: Project, financial and team data to provide a deep-drive into what is/is not possible from a resource, timeline and cost perspective



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Roadmap Structure

Roadmap Structure

- Roadmaps are made up of two objects:
 - Roadmap: The overall object that contains properties for the roadmap as a whole
 - Roadmap Item: The structure and properties of the individual items (Projects, Custom Investments) added to the Roadmap
- Both objects are maintained in Classic CA PPM

| bjects | | | | |
|---------------|--------------|---------|-------------------------|-------------|
| OBJECT NAME | | | | |
| Roadmap | | | | |
| OBJECT ID | | | | |
| DATA WAREHOUS | | | | |
| All | | | | 1 |
| DATA WAREHOUS | TRENDING | | | |
| All | | | | |
| FILTER SH | DW ALL CLEAR | | | |
| Object 🔺 | | ID | Description | Master Obje |
| Roadmap | rdm_roadm | | The Roadmap Object | |
| Roadmap Iter | rdm_roadm | ap_item | The Roadmap Item Object | t Roadmap |

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Roadmap Security & Licensing

Roadmap Security Rights

- Administrators must determine which rights to grant users.
- Note that the Author right gives resources the ability to delete.

| | Access Right 🔺 | Description |
|---|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0 | Roadmap - Author - All | Allows the Roadmap Author to view, edit and delete the Roadmap and manage roadmap- specific picklists in the new user experience. |
| 0 | Roadmap - Create | Allows user to create Roadmaps in the new user experience. The creator of the Roadmap automatically becomes the Author and can edit or delete the Roadmap. |
| | Roadmap - Delete - All | Allows user to view and delete all Roadmaps in the new user experience. |
| 0 | Roadmap - Edit - All | Allows user to view and edit all Roadmaps and manage roadmap-specific picklists in the new user experience. |
| 0 | Roadmap - Navigate | Allows user access to the Roadmap pages in the new user experience. The user will only be able to view information for Roadmaps to which the user has access. |
| | Roadmap - View - All | Allows user to view all Roadmaps in the new user experience. |

- Beginning in 15.6, Roadmaps may be associated to an OBS, and administrators may grant OBS-level access to roadmaps.
 - This topic is covered in the next section.

Roadmap Security Rights (2)

 Naming someone the Roadmap Author will grant them instance Author rights to that Roadmap.



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Creating and Populating Roadmaps

Creating Roadmaps

• Users with the proper rights may create new roadmaps





Creating Roadmaps

- When creating a new roadmap, you will identify the properties of the roadmap, including the time horizon (duration) to be included
- In order to have your roadmap cover fiscal periods in the future, those fiscal periods must be set up in Clarity.
- Roadmap duration options are limited to the fiscal periods set up in your environment. For instance if you set 2020 as your start period, and you only have fiscal periods going out through 2022, the only available duration options will be 1 year or 2 years.

| | NEW ROADMAP | | | |
|--------------------------|---------------------------------------------------------------|---|-----------------------------|--------|
| RO/ Tra Tra Tra | NAME * New Roadmap START PERIOD * 2020 (Next Period) | ~ | duration * 1 Year | ~ |
| Tra Tra Tra | . . | | | CANCEL |

 As with classic Portfolios, the roadmap duration can limit the data that will be viewable in the roadmap for carryover/multi-year projects, and for projects that fall outside the Roadmap's time horizon

- There are 3 ways to populate Roadmap Items into a Roadmap
 - 1. Import from PPM (Ideas, Projects or Custom Investments)
 - 2. Import from .csv
 - 3. Create Manually





Import from PPM

- The *Import from PPM* option will allow you to add to the roadmap Ideas, Projects (not programs!) and Custom Investments that already exist in PPM.
 - Remember Custom Investments are the new, New UX only, items that you may create in your environment
- The options listed in the training environment are *Marketing Plans, Ideas* and *Projects,* because we've created a Custom Investment Object named *Marketing Plans* in this environment. Your list would include whatever Custom Investments you have created.

| CA PPM | | \leftarrow | 0 C C C | | Q | Search or filte | er |
|--------------|-------------------|--------------------|------------------|-----------|------|-----------------|-----|
| \leftarrow | Search or filter | | Cust | om Invest | ment | | |
| | Import from PPM | Capital | Busi | ness Case | | | ost |
| • | Import from CSV | TARGET | Idea | | | | |
| - | Sync Linked Items | IN PLAN VARIANC | Proje | ect | | | i - |
| | | ANAIC | | | | | |

Choose What to Import

- You may Import items by OBS or individually (or both).
- Depending on your environment, import / sync may take a few minutes

| IMPORT PROJECTS | > |
|---------------------------------------------------|--------------|
| PROJECT OBS Organizational > All Groups > Soci | |
| PROJECTS | |
| Search | |
| | IMPORT ITEMS |



Contents will begin to Import

• Upon making your selection, the contents will begin to import to the Roadmap.

| CA PPM | Sample Roadmap | Ĵ | SG Hi, Sara∨ |
|---------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|---------|--------------------|
| $\leftarrow \qquad \qquad$ | Q Search or filter | | view Search 🗸 ई |
| | Import in progress. | | × |
| 2020-Q1 | 2020-Q2 | 2020-Q3 | 2020-Q4 |
| | | | |

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What Is Imported/Synced

- These attributes are imported/synced to the Roadmap, and may be analyzed within the Roadmap
- Sync of custom attributes is covered in the next section





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Sync of Roadmap Data

Ongoing Roadmap Sync

- On an ongoing basis, you will want to sync your Roadmap to ensure the linked items are always displaying the most current/recent information.
- At this point in time, there is no sync job/process. Roadmaps must be manually synced.
- It is best practice to sync your roadmap each time you access it.



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Ongoing Roadmap Sync (2)

• Sync everything, or only sync specific attributes.



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Sync Custom Attributes into Roadmaps (1)

- If necessary, you may sync custom lookup attributes from Projects, Ideas, or Custom Investments into the Roadmap.
- Create a lookup attribute on the Project, Idea or Custom Investment attribute, then create the matching attribute on the Roadmap Item object.
- Ensure the type API Attribute IDs match on both attributes, and that they're both using the same Data type/lookup.



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Sync Custom Attributes into Roadmaps (2)

In Plan

- When you sync custom attributes, the information from the Idea, Project or Custom Investment will sync to the Roadmap.
- The Sync functionality does NOT run on initial import. You will have to add (import) the Idea, Project or Custom Investment to the Roadmap first, then run the Sync Matching Custom Attributes functionality.



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Roadmap Views: Board View

Board View Overview

- The Board View allows for the update and grouping of roadmap items according to different values.
- Use the Settings selection to determine which value should be used for the groupings.



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Show/Hide Columns

- Use the *Columns* chooser to show/hide columns, if necessary.
- Clicking the *Edit* option would allow you to edit the picklist.





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Drag and Drop the Roadmap Items

Drag and drop the roadmap items to the desired columns to update the values.



Color By

 If desired, set a color by value. You can choose the same value as your columns, or a different value. A legend will display at the bottom indicating what the items are colored by.





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Colors Appear in Other Views

• If you utilize a color for the attributes in your custom picklist (also works for Global Picklists), that coloring will also be able to be viewed in the other roadmap views.

| n Plan : 2 个 | Linked To Type | Roadmap Item* 1 \wedge | Go Live Quarter | ML | E. | | | | |
|-------------------|-----------------|--------------------------------------|-----------------|--------|-------------------------|-----------------------------|-------------------------|-----------------------------|--------------------------------|
| \square | Project | AC Core Digital Rollout (Used for Ro | 2020Q1 | | 2020-Q1 | 2020 | -Q2 | 2020-Q3 | 2020-Q4 |
| $\mathbf{\nabla}$ | Project | Airport Access Security (Used for Ro | 2020Q1 | 202001 | • | | Client Services Datama | art (Used for Roadmaps Cla | |
| $\mathbf{\nabla}$ | Project | Client Services Datamart (Used for | 2020Q1 | 2020Q1 | | | Client Services Datama | In (Used for Roadinaps cla | 55) |
| | Project | CRM Enhancements (Used for Road | 2020Q2 | | Airport Acce | s Security (Used for Roadma | aps Class) | | |
| | Project | Maintain legacy purchasing system | 2020Q2 | | Promote New Product | | | | |
| | Project | Mobile Advertising (Used for Roadm | 2020Q4 | | AC Core Digital Pollout | Used for Roadmaps Class) | | | |
| | Project | Mobile Time and Approvals (Used f | 2020Q2 | | AC COTE DISItal Rotour | Used for Roadmaps class, | | | |
| | Project | Online to Offline Market (Used for R | 2020Q3 | 2020Q2 | < Mobile Time and App | rovals (Used for Roadmaps | Class) | Mainta | ain legacy purchasing system (|
| ${\bf \boxtimes}$ | Marketing Plans | Promote New Product | 2020Q1 | | Secur | ty Compliance (Used for Roa | admaps Class) | | |
| | | Sample Unlinked Item | 2020Q3 | | | CRM Enhancer | nents (Used for Roadmag | | |
| | Project | Security Compliance (Used for Road | 2020Q2 | | | CRM Efficiencen | ients (used for Roadina | ps class, | |
| | Project | Web Based Trading (Used for Road | 2020Q4 | 2020Q3 | Sample Unlinked Item | | Online to Offline Mark | rket (Used for Roadmaps Cla | ass) |
| | | | | 2020Q4 | | | | Mohile Adv | vertising (Used for Roadmaps |

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Roadmap Views: Timeline View

Timeline View Settings

- Click to access the settings in the *Timeline* view.
- If desired, update the *Zoom* and *Periods* display values.



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Swimlanes and Color By

• Update the *Swimlanes* and *Color By* values to group and color data on the Timeline View.



Metrics

- In the Settings menu, select up to 3 metrics that may be displayed directly on the Timeline bars.
- A grid will appear at the bottom of the page indicating what each value represents.



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Metrics (2)

 Metrics will display on each bar, and will sum for each swimlane.



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Roadmap Views: Grid View

Grid View Settings

- Click the *Settings* button to access the Grid View Settings.
- Update the decimal display for Money and numbers if necessary.
- Check the *Clip Metrics to Roadmap Dates* option if you want the data in the roadmap to be constrained to the dates set for the Roadmap. Uncheck to include all data for all included Projects and Custom Investments.
- The other options will be covered later.



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Grid View

- Use the Grid View to manage Roadmap data elements.
- Begin by using the column chooser to add fields to view.

| | Search | | \$ | |
|---------|--------|-------------|-------------|-----|
| Sponsor | Owner | Start | Finish | |
| | | Jan 01 2020 | Dec 31 2020 | ←[] |
| | | Jan 29 2020 | Sep 01 2020 | |
| | | May 15 2020 | May 26 2020 | |
| | | Apr 05 2020 | Jul 09 2020 | |
| | | Sep 01 2020 | May 26 2021 | |

Select Fields

- Select the fields you wish to see in view.
- Use the column chooser to add totals for Cost and Capacity Fields.
- Per Period metrics may be added in later, via a separate menu.
- Custom Roadmap Item attributes will be available to be selected, as long as they are API Attribute enabled.



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Add Per Period Metrics

• If desired, you may add per period metrics to the view using the *Settings* menu.

| SG Hi, Sara Search Search otals Total Cost Capital Cost Operating B | | 19,152 | 142,65 | 54 87,6 | 54 55,00 | 10 |
|-------------------------------------------------------------------------------------------------------------------------|--------|--------|------------|--------------|-----------|------|
| VIEW UNSAVED Search | pacity | | Total Cost | Capital Cost | Operating | В |
| | otals | | | | | |
| G SG Hi, Sara | | | | TETT | ~ | |
| | | | | Ĺ | SG Hi, S | Sara |

| | ~~ | |
|-------------------------------------------------------------------------------------|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| MONEY DECIMAL DISPLAY 0.00 0.0 0 0 | × | MONEY DECIMAL DISPLAY O 0.00 O 0.0 0 |
| NUMBER DECIMAL DISPLAY 0.00 0.0 0 TARGETS Search | .0 .0 .0 | NUMBER DECIMAL DISPLAY 0.00 0.0 0 0 0 2 TARGETS Search |
| Search | ,5 3,1 ,8 | Show Targets |
| PER-PERIOD METRICS Search | .0 | Search 00 |
| PERIODS * Quarters ~ | ,4 | ✓ Total Cost ✓ Capital Cost |
| ☑ Clip Metrics to Roadmap Dates | | ✓ Operating Cost□ Actual |
| MANAGE PICKLISTS | | Actual Capital Cost Actual Operating Cost Benefit |
| | | 🗌 Capacity |

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Per Period Metrics

• Depending on what the *Periods* is set to, you will then see data for those periods in the grid view

| MONEY DECIMAL DISPLAY | vit | | s | ample Road | map | | | | | ∴ SG | Hi, Sar |
|-------------------------------------------------------------|------------------|----------|------------|--------------|-----------|---------|------------|--------------|----------------|------------|-----------|
| NUMBER DECIMAL DISPLAY 0.00 0.0 0 | r filter | | | | | | | F 111 | VIEW UNSAV | | ŵ |
| TARGETS Search | | Totals | | | | | 2020-Q1 | | | 2020-Q2 | |
| Show Targets | - | Capacity | Total Cost | Capital Cost | Operating | Benefit | Total Cost | Capital Cost | Operating Cost | Total Cost | Capital C |
| Show Targets | t (Used for Ro | 19,152 | 142,654 | 87,654 | 55,000 | | 35,497 | 21,811 | 13,686 | 35,497 | |
| | y (Used for Ro | 13,160 | 2,000,000 | 500,000 | 1,500,000 | | 581,427 | 145,357 | 436,070 | 839,838 | |
| PER-PERIOD METRICS | art (Used for | | 47,000 | 25,000 | 22,000 | | 0 | 0 | 0 | 47,000 | |
| Total Cost, Capital Cost, Operatin | sed for Road | 3,264 | 612,000 | 412,000 | 200,000 | | 0 | 0 | 0 | 556,315 | |
| | asing system | 3,520 | 45,572 | 41,015 | 4,557 | | 0 | 0 | 0 | 0 | |
| PERIODS * | ed for Roadm t | 2,928 | 131,358 | 113,240 | 18,118 | | 0 | 0 | 0 | 0 | |
| Quarters 🗸 🗸 | ovals (Used f | 120 | 409,731 | 245,838 | 163,892 | | 264,984 | 158,991 | 105,994 | 144,746 | |
| | et (Used for R I | | 62,884 | 28,851 | 34,033 | | 0 | 0 | 0 | 11,912 | |
| | | | 0 | | | | 0 | | | 0 | |
| Clip Metrics to Roadmap Dates | | | | 200.000 | 400,000 | | 149,379 | 49,926 | 99,454 | 149,379 | |
| ☑ Clip Metrics to Roadmap Dates | Used for Road | 6,160 | 600,800 | 200,800 | 400,000 | | | | | | |

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Roadmap Targets

Roadmap Targets

- Roadmap Targets provide functionality similar to Portfolio Waterlines. You can set targets / thresholds (financial, resource, etc.), and determine which roadmap items, when included, allow you to remain within those thresholds.
- Access the settings menu to turn on targets.
- Choose which targets to display.

MONEY DECIMAL DISPLAY

NUMBER DECIMAL DISPLAY

0.00 0.0 0 0

○ 0.00 ○ 0.0 ○ 0

2

Show Targets

PER-PERIOD METRICS

PERIODS *

Quarters

Total Cost, Capital Cost, Operatin...

Clip Metrics to Roadmap Dates

MANAGE PICKLISTS

Search...



Set Target Values

- Now that the targets are displayed, set the values for each by clicking the edit button.
- Repeat for the remaining Targets
- Note that the "total" value will not automatically populate with the sum of, for example, the Operating and Capital. You will have to manually set each value.
- Note: Targets will be saved with the view, so re-save as necessary.

| Total Cost 0 | | Operating | Cost | Capital Cost | | | |
|---------------|---------------------------|-----------|-----------------------------------------------|--------------------------------------------------------|-----------|-----------------------|--|
| TARGET 🖉 | 0 | TARGET | 0 | TARGET | 0 | | |
| IN PLAN | 0 | IN PLAN | 0 | IN PLAN | 0 | | |
| VARIANCE | 0 | VARIANCE | 0 | VARIANCE | 0 | | |
| | | | | | | | |
| In Plan 🚦 2 个 | Linked To Type | e | Roadmap Item* 1 个 | | Must Have | Sponsor | |
| n Plan ፤ 2 ↑ | Linked To Type Project | e | Roadmap Item* 1 ↑ AC Core Digital Rollo | | Must Have | Sponsor Garvey, Si | |
| In Plan : 2 个 | | e | - | out (Used for Ro | Must Have | | |
| In Plan : 2 ↑ | Project | e | AC Core Digital Rollo | out (Used for Ro rity (Used for Ro | Must Have | | |
| In Plan : 2 个 | Project Project | e | AC Core Digital Rollo Airport Access Secur | ut (Used for Ro rity (Used for Ro mart (Used for | Must Have | | |

| Total Cost | | Operating Cost | | Capital Cost | |
|------------|-----------|----------------|---|--------------|---|
| TARGET | 5,000,000 | TARGET | 0 | TARGET | 0 |
| IN PLAN | 0 | IN PLAN | 0 | IN PLAN | 0 |
| VARIANCE | 5,000,000 | VARIANCE | 0 | VARIANCE | 0 |

| Total Cost | | Operating Co | st | Capital Cost | |
|------------|-----------|--------------|-----------|--------------|-----------|
| TARGET | 5,000,000 | TARGET | 2,000,000 | TARGET | 3,000,000 |
| IN PLAN | 0 | IN PLAN | 0 | IN PLAN | 0 |
| VARIANCE | 5,000,000 | VARIANCE | 2,000,000 | VARIANCE | 3,000,000 |

In Plan

- Now that the targets are set, begin determining which investments are *In Plan* by checking the checkbox.
- As items are checked, the measure against the targets will increase.
- When a target is exceeded, the target will turn red.

| Total Cost | | Operating | Cost | Capital Co | st | Capacit | у | | | | | |
|-------------------------------|-------------------------------------|-------------------------------|-----------------------------------|-------------------------------|-----------------------------------|------------------------|-------------------------------------|--------------------------|-----------------------------------|------------------------|--------------------------------------|-----------------|
| TARGET IN PLAN VARIANCE | 5,000,000 2,142,654 2,857,346 | TARGET IN PLAN VARIANCE | 2,000,000 1,555,000 445,000 | TARGET IN PLAN VARIANCE | 3,000,000 587,654 2,412,346 | IN PLAN | 3 | 0,000 12,312 7,688 | | | | |
| | | | | | | | | | | | | |
| Plan : 2 个 | Linked To Type | | Roadmap Item* 1 个 | | Total Cost | - | Operating Cost | 0 | Capital Cost | | Capacity | |
| Plan : 2 ↑ | Project | | AC Core Digital Rollo | ut (Used 1 | Total Cost TARGET IN PLAN | 5,000,000 3,751,199 | Operating Cost TARGET IN PLAN | 2,000,000 2,097,601 | Capital Cost TARGET IN PLAN | 3,000,000 1,653,598 | Capacity TARGET IN PLAN | 50,000 42,14 |
| Plan : 2 ↑ | | | | ut (Used 1 ity (Used | TARGET | | TARGET | 2,000,000 | TARGET | | TARGET | |

- For some Targets, the metric is not necessarily a value you're looking to remain within, but instead a threshold or goal you're looking to hit. An example of this would be *Benefit*. When you achieve the benefit target, you're not "red" or "over budget," but instead, you've hit your target.
- For these metrics, you can set the Target as a goal by clicking the up arrow.



Targets as Goals (2)

• Instead of turning from green to red when met, goals will turn from blue to green.

| Benefit 🕥 | | Benefit | | Benefit | 0 |
|-------------------------------------------------------------------|--------------------------|-------------------------------|-------------------------------|-------------------------------|----------------------------------|
| TARGET 500,000 IN PLAN 0 VARIANCE 500,000 | Indicates this is a goal | TARGET IN PLAN VARIANCE | 500,000 300,000 200,000 | TARGET IN PLAN VARIANCE | 500,000 531,000 (31,000) |



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Questions?



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Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications** ٠
- Click on Maintain My Certification
- Click on Visit CCRs button under the Report PDUs ٠
- Click on **Report PDUs** ٠
- Click on Course or Training ٠
- Class Name = regoUniversity
- Course Number = Session Number
- Date Started = **Today's Date** ٠
- Date Completed = **Today's Date** ٠
- Hours Completed = 1 PDU per hour of class time ٠
- Training classes = **Technical**
- Click on I agree and Submit





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