



Using the Investment Portal

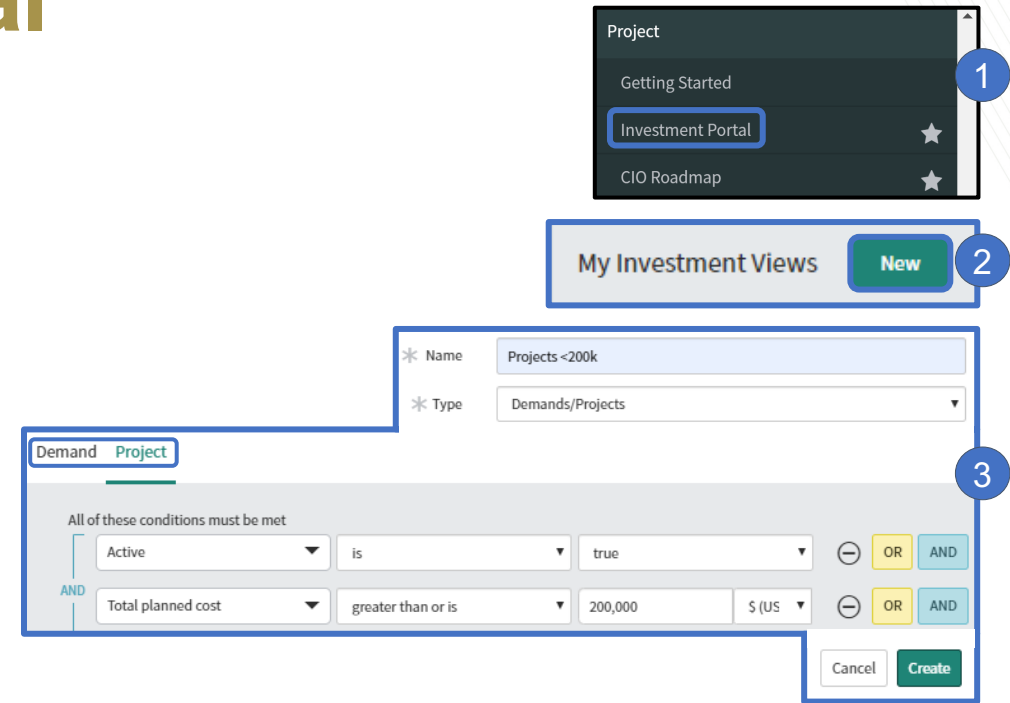
Quick Reference Guide

Using the Investment Portal

The **Investment Portal** gives you a comprehensive view of project and demand financials, deadlines, and other important metrics in an intuitive user interface that makes project and demand management more efficient.

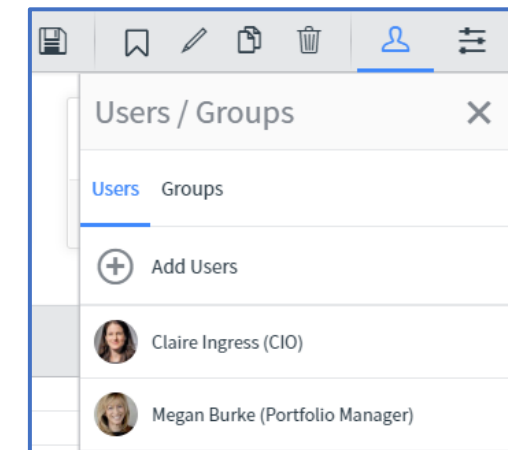
With Investment Portal you can create multiple investment boards using filters and share it with others. You can save time by copying existing boards and then modifying as needed.

1. Click on **Investment Portal** in the left hand navigation.
2. Click **New** to create your first filter (board).
3. Enter a name for your board, select the type of data you want to filter on, enter filter criteria, and click **Create**.



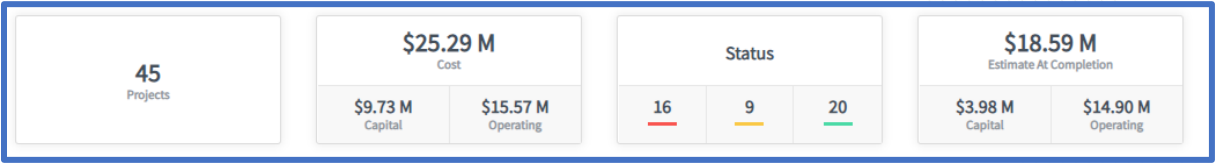
The Investment Portal is divided into the following sections:

1. **Banner Icons** – You can edit, copy, delete, bookmark, and share your investment board with other members and groups using the banner icons on the header of Investment Portal. Clicking the configuration icon allows you to hide some or all widgets at the top.



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2. **Investment Widgets** – You can view important metrics such as total cost, actual cost, and budget with investment widgets that can be configured.



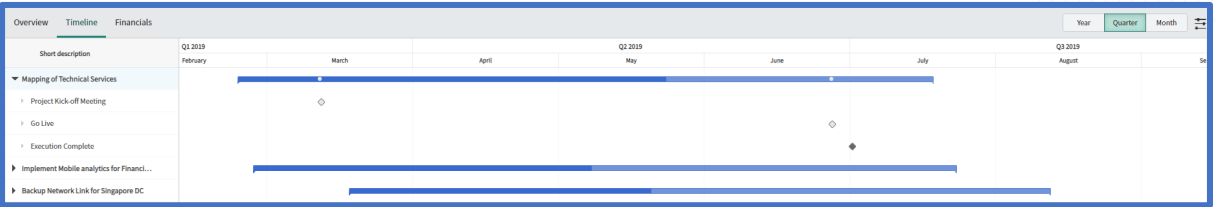
3. **Three key tabs** – These tabs allow you to track important aspects of your projects and demands in one location:

- The **Overview** tab displays a high-level summary of projects and demands. The information in the grid is based on the project and demand form fields. Drag column headers into the row to group data. Click the configuration icon on the right to modify columns and export data to excel.

The Overview tab displays a table with the following columns: Name, Manager, Portfolio, Strategies, Total planned..., % Complete..., State, Planned start..., Planned end..., Pla..., EAC, and R... The table lists four items:

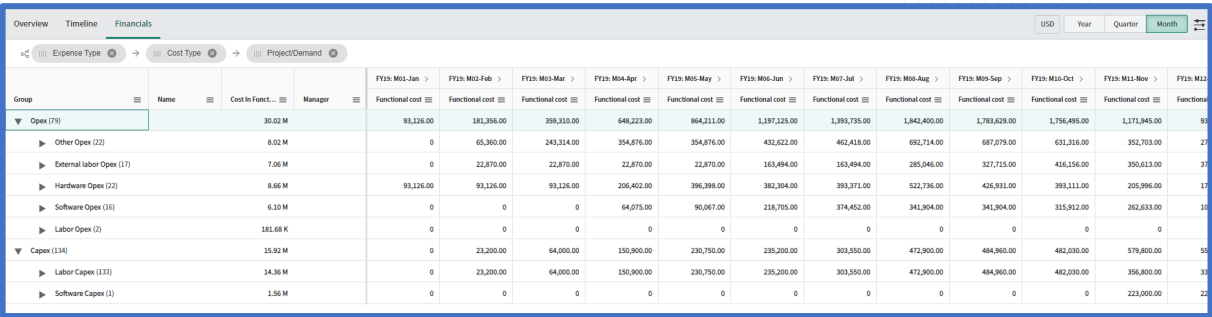
Name	Manager	Portfolio	Strategies	Total planned...	% Complete...	State	Planned start...	Planned end...	Pla...	EAC	R...
New CIO Dashboard	Paul Martin (Proje...	IT Transformation		574.40 K	0	Pending	04-01-2020	01-01-2021	0	0	
Develop New Employee Portal		IT Transformation		172.48 K	0	Pending	04-02-2020	01-01-2021	0	0	
New Benefit Tracking Page	Paul Martin (Proje...	HR		835.20 K	0	Pending	06-04-2019	03-04-2020	0	0	-100
New Big Room Planning Page	Paul Martin (Proje...	IT Transformation		1.29 M	0	Pending	01-01-2020	10-01-2020	0	0	

- The **Timeline** tab displays key milestones in a Gantt view. Click the Year/Quarter/Month to change the zoom. Click the black arrow to view the Key Milestones (white dots on the blue Gantt bar) and Milestones (diamonds). Dark blue (vs the light blue) Gantt bars represent the Percent Complete.



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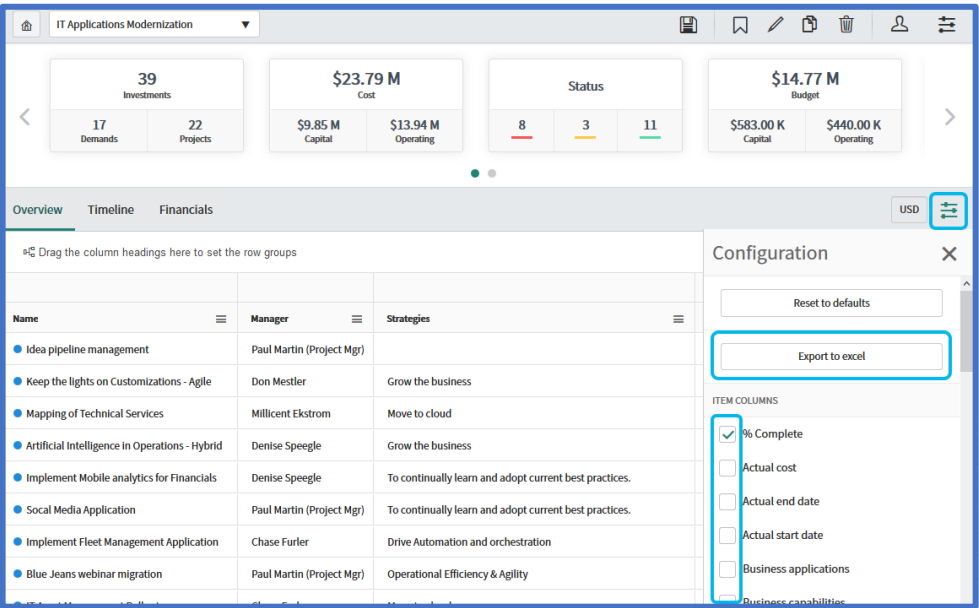
The **Financials** tab displays a detailed breakdown of cost aspects of your projects and demands in yearly, monthly and quarterly formats based on cost plans associated to your projects and demands. View the details of the cost plan record by right clicking on the Name column and selecting **View Cost Plan**. Drag column headers into the row to group data differently.



The screenshot shows the 'Financials' tab with a table displaying cost data for various groups and months. The table has columns for 'Group', 'Name', 'Cost In Funct...', 'Manager', and monthly functional costs from FY19-M01-Jan to FY19-M12-Dec. The 'Opex' group is expanded, showing sub-items like 'Other Opex', 'External Labor Opex', 'Hardware Opex', 'Software Opex', 'Labor Opex', and 'Capex'.

Group	Name	Cost In Funct...	Manager	FY19-M01-Jan	FY19-M02-Feb	FY19-M03-Mar	FY19-M04-Apr	FY19-M05-May	FY19-M06-Jun	FY19-M07-Jul	FY19-M08-Aug	FY19-M09-Sep	FY19-M10-Oct	FY19-M11-Nov	FY19-M12-Dec
Opex (79)		30.02 M		93,126.00	181,356.00	359,310.00	648,223.00	864,211.00	1,197,125.00	1,393,735.00	1,842,400.00	1,783,628.00	1,756,495.00	1,171,945.00	93
▶ Other Opex (22)		8.02 M		0	65,360.00	243,314.00	354,876.00	354,876.00	432,622.00	462,418.00	692,714.00	687,079.00	631,216.00	352,703.00	27
▶ External Labor Opex (17)		7.06 M		0	22,870.00	22,870.00	22,870.00	22,870.00	163,494.00	163,494.00	285,046.00	327,715.00	416,156.00	350,613.00	37
▶ Hardware Opex (22)		8.66 M		93,126.00	93,126.00	93,126.00	206,402.00	396,388.00	382,304.00	393,371.00	522,736.00	426,931.00	393,111.00	205,996.00	17
▶ Software Opex (16)		6.10 M		0	0	0	64,075.00	90,067.00	218,765.00	374,452.00	341,904.00	341,904.00	315,912.00	262,633.00	10
▶ Labor Opex (2)		185.68 K		0	0	0	0	0	0	0	0	0	0	0	0
▶ Capex (134)		15.92 M		0	23,200.00	64,000.00	150,900.00	230,750.00	235,200.00	303,550.00	472,900.00	484,960.00	482,030.00	579,800.00	95
▶ Labor Capex (133)		14.36 M		0	23,200.00	64,000.00	150,900.00	230,750.00	235,200.00	303,550.00	472,900.00	484,960.00	482,030.00	556,800.00	33
▶ Software Capex (1)		1.56 M		0	0	0	0	0	0	0	0	0	0	223,000.00	22

Click the Configuration icon to **add/remove columns** and **export to Excel**.



The screenshot shows the 'Configuration' dialog box with a table of items and a list of item columns. The 'Export to excel' button is highlighted. The table lists items like 'Idea pipeline management', 'Keep the lights on Customizations - Agile', 'Mapping of Technical Services', etc., with their managers and strategies.

Name	Manager	Strategies
Idea pipeline management	Paul Martin (Project Mgr)	
Keep the lights on Customizations - Agile	Don Mestler	Grow the business
Mapping of Technical Services	Millicent Ekstrom	Move to cloud
Artificial Intelligence in Operations - Hybrid	Denise Speegle	Grow the business
Implement Mobile analytics for Financials	Denise Speegle	To continually learn and adopt current best practices.
Social Media Application	Paul Martin (Project Mgr)	To continually learn and adopt current best practices.
Implement Fleet Management Application	Chase Furler	Drive Automation and orchestration
Blue Jeans webinar migration	Paul Martin (Project Mgr)	Operational Efficiency & Agility

Configuration

Reset to defaults

Export to excel

ITEM COLUMNS

- ☒ % Complete
- ☐ Actual cost
- ☐ Actual end date
- ☐ Actual start date
- ☐ Business applications
- ☐ Business capabilities