InVizion Solution Overview

The #1 reason our Clients implement InVizion is for **defensible decision-making** on capital program budgets. Our patented InVizion software has helped Clients replace many cumbersome spreadsheets that were needed to manually integrate capital program schedules and budgets from disparate enterprise systems to support their long-range planning efforts.

An implementation of InVizion typically combines the commercial off-the-shelf (COTS) software with customized data integrations and user-interfaces to enforce each Client's preferred project/portfolio optimization and workflow processes. This configuration provides Clients the ability to use their own terminology and business rules to:

- rank and prioritize projects in multi-year programs,
- quickly generate and compare optimized scenarios for long-range budgeting,
- allocate budgets based on strategic goals and objectives,
- evaluate and optimize program budgets by group such as funding sources or missions,
- track approvals of new projects or requested changes,
- plan and assign resources to project work,
- compare budget to performance periodically,
- manage project execution, and
- report performance to stakeholders.

PROGRAM AND PORTFOLIO OPTIMIZATION

Our **patented** InVizion software can summarize logical relationships from your detailed project activities into the appropriate level of projects' Work Breakdown Structure (WBS) for strategic decision making. Projects or WBSs can be tagged with groupings of priorities, eligibility, and a multitude of attributes for analysis. InVizion's unique **Portfolio Layering and Leveling** features are then used to quickly generate optimized **multi-year budget scenarios** after considering the relationships, priorities, order and eligibility of projects and WBSs.

CONFIGURABLE AND CUSTOMIZABLE SOLUTION

InVizion software is designed to be very configurable, capable of storing and using the Client's terminology to label various data fields for grouping, filtering, updating, sorting, and data entry. Its web-based interfaces ("WebForms") are customizable to ease end-user training and adoption. For example, separate tabs or menus can be **customized** and presented to the end-user for various project or program management processes such as:

- Portfolio Planning tab for project intake, assessment, prioritization, and approval.

- Portfolio Analysis tab to analyze projects based on resources, finances, funding sources and a match to business strategy and goals.

- Resource Planning tab to assign and track resources based on skills required on projects.

- Projects Info tab to plan and monitor project performance and add/review documents.

- Cost Management tab to track and compare budget versus actual costs.

InVizion

- Change Requests and Approvals tab to initiate requests for review and approval.

- Dashboards tab to show high level portfolio or project summaries and health.

- Reports tab to communicate among project team members and management.

InVizion is designed with out-of-the-box functionality to **configure** your data set and data structure using **your terminology** through the following features:

- Unlimited Group Codes (alphanumeric) to organize projects into any number of groups and hierarchy, such as Division, Executive Sponsor, District, Asset Codes, Project Codes, Phases, Work Breakdown Structure Codes, Organization Name, Status, Strategic Category, Priority, Eligibility.

- Unlimited Resource Categories and Elements to allocate funding, budget, cost, manpower, square feet, etc. over time periods. There are no required names or default resource categories and resources.

- Unlimited, user-defined Date fields to record or calculate actual dates, target completion date, in-service dates, phase milestones, last/next update dates, etc.

- Unlimited, user-defined Number fields to record or calculate values associated with project needs, cost estimates, performance metrics, constraints, approved funds, variances, etc.

- Unlimited, user-defined Percentage fields to record or calculate percent complete, cost-sharing ratio, key performance indexes, readiness, variance percentage, landing zone, ROI, etc.

- Unlimited, user-defined Notes fields for comments or narratives, including project justification, benefits statements, progress updates.

- Unlimited, user-defined Document Links, which are links to documents, including file paths to be associated with each project or work package.

Client-configured labels are referenced throughout the application, making InVizion's user interface very easy-to-understand and intuitive when creating or reading custom reports and dashboards. Values and dates can be manually entered, imported, or calculated using **flexible formulas** configured for each Client.

Logical relationships can be manually entered between projects or specific work at a desired level of detail or created via data integration from another project scheduling application such as Oracle Primavera P6. Summary project schedules and your overall portfolio roadmap can be calculated based on these logical or virtual relationships.

The InVizion solution includes the ability to create unlimited versions or scenarios for budget versions, taking into consideration the funding or budget limits (target levels) defined by your program manager for any time frame. Using InVizion's **"what-if"** capabilities along with an automatic level portfolio roadmap feature, multiple **optimized scenarios** can be quickly generated for **defensible** decision-making.

Moreover, an innovative "Data Links" feature allows relationships to be established between "entities" (such as linking a **funding source** to all eligible projects fitting a specific criteria)

and/or when you need values or key performance indicators (KPIs) to be calculated by referencing the relationship. This feature is extremely useful for **modeling work processes** -- for example, a "Work Acceptance" process to map available funds or resources (i.e., "supply") to requested work/products/services (i.e., "demand") and then calculate and display any resource overload or budget shortfalls at the Department or Portfolio level.

Built on top of this very flexible structure, InVizion's **browser-based user interface** ensures high-quality data while enforcing compliance with Client's business rules — to prevent unnecessary data reconciliation processes and rework, and to re-use available data without redundancy.

Each Client receives their own **customized version of the user interface** (UI) developed very economically from InVizion's existing toolbox of components. This allows the design, including required fields and workflow, on each form (such as a Project Intake Form or a Budget Change Request Form) to be built exactly to Client requirements. Your program planning, budgeting and project execution workflow can be customized to collect as much or as little information as required, then email notifications can be sent to the logical next party or individuals to take appropriate action.

Sample customized Web Form to add/update project information and/or initiate a workflow process.

InVizion WebForms will enforce the data quality and security of input to the InVizion databases. The goal of customization is to make the UI as intuitive as possible for the end-users, to enable a smooth transition to a modern system while introducing time-savings and new functionality. For instance, when a user reformats a view by filtering, grouping, adding columns, or removing columns; the layout of this grid persists and is restored for the user the next time it is displayed.

These WebForms can be **customized** to display instructional text and error/validation messages, for example, to inform the end-user of expected workflow, required fields, invalid data, etc. when filling out forms.
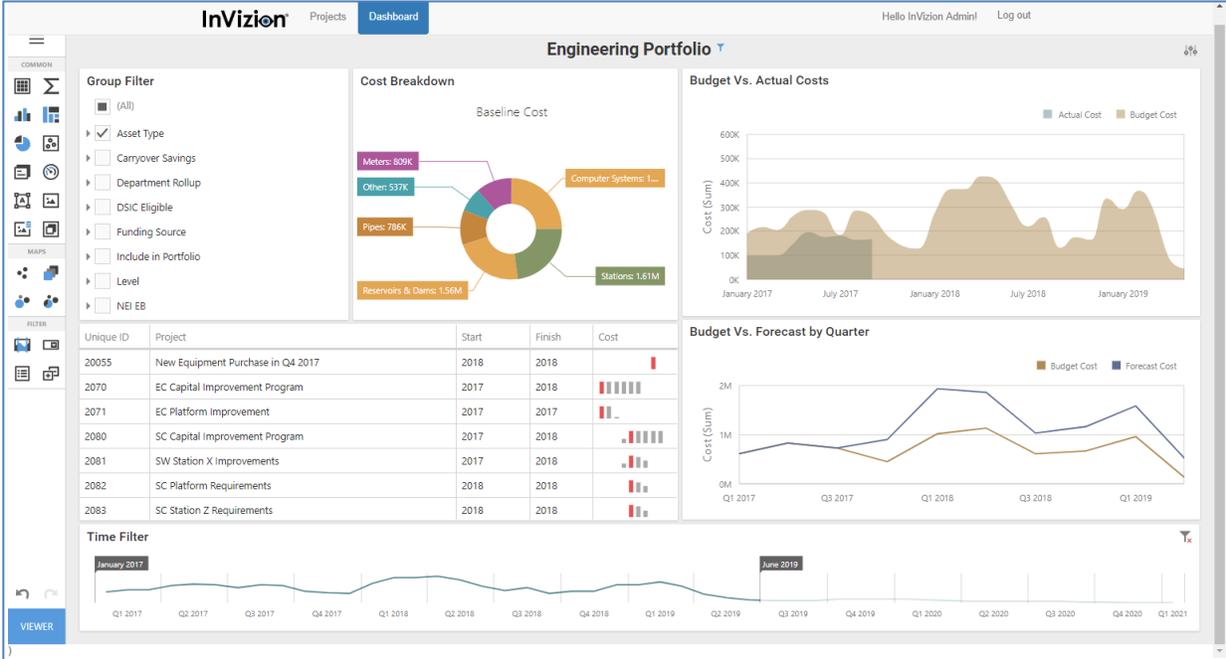
The design and delivery of these custom UI forms are part of our implementation services.

![InVizion logo]

ENHANCE STAKEHOLDER COMMUNICATIONS

InVizion includes a built-in module of interactive dashboards, reports, and views. The charts, graphs, tables, and forms configured within a Dashboard or Custom Report can be driven by InVizion's built-in reporting tables which can be refreshed on demand or on a schedule.

The InVizion custom reports designer allows use of logos, grouping, sorting, filtering, page skipping, formula calculations, conditional formatting, and summaries in the header/footer sections with expand/collapse capabilities.

Reports can be made available to all users or to only to a certain group of users. Lengthy reports can even be designed to collapse or expand in a view window, and even include its automatically generated table of contents.

Dashboards and reports can be configured to enable drilldowns and display different charts and lists with collapsible / expandable grouping bands.

CONTACT US

Let us show you how your program can be optimized and executed with InVizion, and how the reports and dashboards can satisfy your stakeholder communication needs. Send an email to info@invizionllc.com for more information or to arrange a demonstration.