

CorPortfolio

Assemble information into a dashboard or briefing document



Organisations collate a wealth of performance and planning information into important documents on a regular basis. Information in numeric, graphical and textual forms must be sourced from a variety of people, business systems, spreadsheets and documents. Depending on the purpose of the document, text might serve different purposes – such as interpreting results, describing related facts, outlining current activities or recommending specific initiatives.

CorVu's innovative CorPortfolio module can automatically assemble this performance and planning information

into a briefing book, board report, management report pack, management dashboard or an online 'planning and performance portal'. In addition to CorVu's comprehensive data sourcing and data capture technologies, CorPortfolio can provide document templates and collaborative workflows to simplify and streamline the collation of these many periodic reports or dashboards that might be required.

Most importantly, because the configuration of reports and dashboards requires no 'programming' skills, business users are empowered and IT bottlenecks can be avoided.

KEY BENEFITS

Improve management reporting

Improve the quality of available information by combining reports and analysis with related text

Streamline management reporting process

Streamline the management reporting process by using templates, automated assembly and collaborative workflows

Reduce costs

Reduce the cost of manual assembly while fast-tracking the availability of periodic management report packs

Leverage investment in existing systems

Leverage investment in existing information systems (e.g. ERP systems, HR systems, project management systems, quality systems, incident systems, portals, various documents, databases, spreadsheets and BI applications)

Enable virtual meetings

Conduct online meetings, review performance results and make necessary decisions using interactive, on-line material that serves as 'one version of the truth'

KEY FEATURES

Portfolio creation

- Simple desktop publishing application created specifically to automate periodic reports
- Designed to be used by business users
- Combine text, graphics, reports, spreadsheets, commentary and other data into a single portfolio
- Embed any CorVu object, OLE object, graphic, text file or hyperlink
- Attach notes and annotations to any object
- Reference style sheets to apply corporate template settings to all published reports
- Flexible user-defined report headers, footers and side-bar commentary
- Automatically create a paginated table of contents for the portfolio
- Automatically update a portfolio with new performance information at regularly scheduled intervals
- Archive historical periods

Portfolio deployment

- Professional quality printed outputs
- Make available online in PDF, Java-based deployment, and HTML formats
- Simple tab navigation of portfolio components
- Interactively drill into portfolio objects for additional analysis
- Conduct virtual meetings for viewing electronic performance portfolios

Document styles

- Briefing books and management report packs
- Board reports
- Project reports
- Statutory reports
- Service level reports
- Customer/Employee/Supplier reports

WHAT SETS CORPORTFOLIO APART

Ease of use

- Simple mechanism for assembling information
- Assemble required performance information into a portfolio, then schedule automated updates
- Toggle from one period's portfolio to the next
- Requires no programming or IT resources

Communication and collaboration

- Text within the portfolio can communicate comments, summaries, recommendations, decisions or planned actions
- Text can be added from widely dispersed users into a centrally assembled portfolio

Low total cost of ownership

- Leverages existing systems and technologies
- Easy to deploy, manage and update
- Business user-driven
- Scalable, web-deployed solution
- Achieve rapid ROI by automating costly manual processes

Flexibility

- Pull information from virtually any source
- Publish a broad range of document styles
- Interactive capabilities, including drill-down and slice-and-dice



CorVu, a Rocket software brand

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