



Rocket® CorVu CorPortfolio

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

Streamline the management reporting process by creating templates, automated updates, and collaborative workflows

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

Leverage investments in existing information systems, such as ERP systems, HR systems, project management systems, quality systems, incident systems, portals, various documents, databases, spreadsheets, and BI applications

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

Assemble Information into a Dashboard or Briefing Document

Organizations compile a wealth of performance and planning information, and incorporate this data 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.

Rocket's innovative CorPortfolio solution 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 the comprehensive data sourcing and data capture and integration technologies enabled by other Rocket CorVu modules, CorPortfolio can provide document templates and collaborative workflows to simplify and streamline the assembly and collation of required periodic reports or dashboards.

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

Key Benefits

- ❖ Improve and streamline the management reporting process
- ❖ Reduce costs of manually producing management and board reports by fully automating with CorPortfolio, and eliminate the need to print management reports in hard copy
- ❖ Leverage investment in existing systems
- ❖ Enable virtual meetings and allow for real-time interaction and drill-down on key numbers.

- ❖ Conduct virtual meetings while viewing electronic performance portfolios

Produce Custom Reports

- ❖ Briefing books and management report packs
- ❖ Board reports
- ❖ Project reports
- ❖ Statutory/governance/regulatory reports
- ❖ Service level reports
- ❖ Customer/employee/supplier reports

Key Features

Portfolio Deployment

- ❖ Professional quality printed output
- ❖ Make available online in PDF and HTML formats
- ❖ Simple tab navigation of portfolio components
- ❖ Interactively drill into portfolio objects to transaction-level detail for additional analysis

Key Features

Portfolio Creation

- ❖ Simple desktop publishing-style application created specifically to automate periodic reports
- ❖ Designed for business users
- ❖ Combine text, graphics, reports, spreadsheets, video clips, commentary, and other data into a single portfolio
- ❖ Embed any Rocket CorVu object, OLE object, graphic, text file, or hyperlink
- ❖ Attach notes and annotations to any object
- ❖ Reference style sheets 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 user-defined and/or regularly scheduled intervals
- ❖ Archive historical periods of information
- ❖ Personalize multiple page dashboards and briefing books for different recipient needs

Why CorPortfolio?

Ease of Use

- ❖ Simple mechanism for assembling information into a briefing book or portfolio
- ❖ Schedule automated information updates
- ❖ Toggle from one period's performance 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
- ❖ Comments and 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 analysis capabilities

- www.rocketsoftware.com
- info@rocketsoftware.com
- twitter.com/rocket
- www.youtube.com/rocketsource
- www.linkedin.com/company/rocket-software
- plus.google.com/u/0/104109093105646534918

