ECVT User guide

Execution and Collaboration Value Tracker

ECVT version: Buenos Aires

Contents

What’s new in ECVT Buenos Aires release

This release focused on **bug fixing and technological upgrades of ECVT** to ensure a smooth and efficient user experience.

Design Improvements:

- **Ability to collapse Home Page cards**, allowing users to customize their experience.
- In the Portfolio view, users can **search by tags** for created views and **remove table values** using the Reset Grid button.

Getting started with ECVT

ECVT is an AlixPartners proprietary digital platform designed to enable collaboration, drive actions, and focus on impact. ECVT equips cross-functional, de-centralized teams with structure to collaborate & coordinate.

Build initiatives / your portfolio. Teams are using ECVT to capture, size and build out initiatives. Leverage the existing value taxonomy in ECVT and make sure teams have a common understanding of all fields, including custom fields. Project and workstream leaders need to help initiative owners to capture information consistently and de-duplicate opportunities across streams. Teams can also use the comments function to communicate in the tool. Leverage the "Pipeline Assessment" dashboard in ECVT to solidify the portfolio and push a list of ideas into an under-writeable initiative portfolio. As you shape the portfolio into a program of work, you might need to refine the workstream structure and custom attributes.

Report on the portfolio. Teams need to use ECVT frequently and consistently to make reporting meaningful. You can customize, save, and load various views on the portfolio page to either check status, create your custom-reporting, or extract data as needed. It typically works best to create standard pipeline reporting that gets updated regularly. You can also leverage the ECVT dashboards to provide updates where data is instantaneously refreshed.

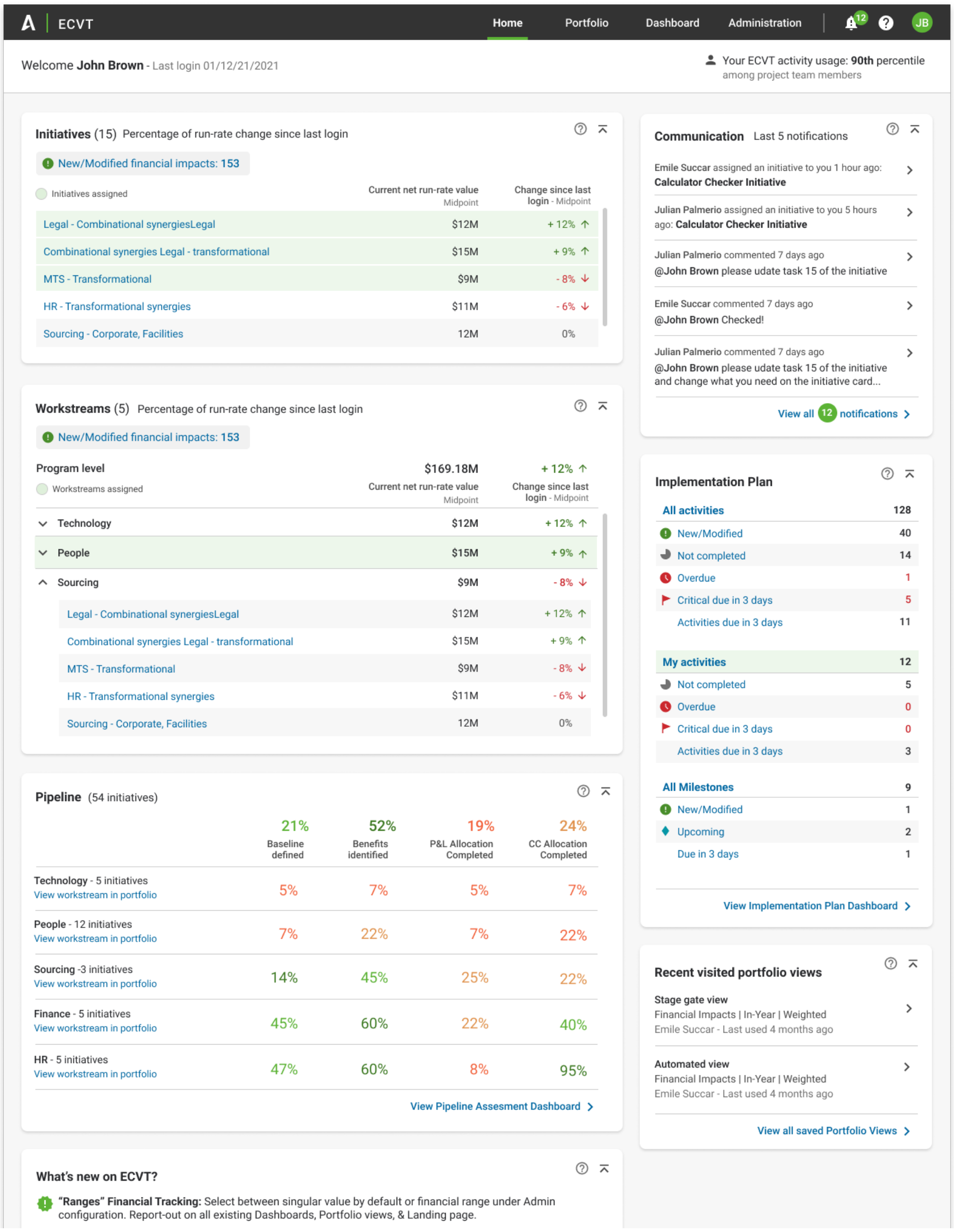
Move initiatives towards implementation. You can utilize the implementation plan section to capture implementation activities, milestones, and timelines. Users can also leverage the "Implementation Plan" dashboard to track activities against completion targets. You can utilize the stage gate taxonomy in ECVT to manage initiative progression consistently.

Execution progress is tracked and actively managed. Make sure implementation plans and timing changes are updated regularly and consistently. It is to be expected that some initiatives will run into unanticipated roadblocks, get delayed, yield lower benefits than estimated, or incur higher costs than expected. Project leadership and XMO attention is necessary to identify risks early and take mitigating actions

New **single-sign-on** (SSO) integration allows clients to login with their own organization's credentials including multi-factor app.

ECVT Homepage

ECVT's homepage lets you easily access personalized insights via "cards" without searching for or applying filters. Different **cards** are displayed, depending on your admin-defined role. These are some of the cards you may find on the homepage when you access ECVT:



ECVT Home Page

Initiatives: displays all the initiatives with the net run rates value changes since your last login event. Initiatives assigned to you are marked with a green color background.

Workstreams: displays information about the workstreams that you have access to. When expanded via the arrow keys, you can view and access all underlying initiatives.

Pipeline: shows the Pipeline (data quality and completion) dashboard with the changes since your last login, and links to the portfolio view of each workstream.

Activities status: shows the progress status of the activities. If you have initiatives assigned to you, you will see the activities related to your initiatives.

Recent portfolio views: link to the last saved portfolio views that you have visited.

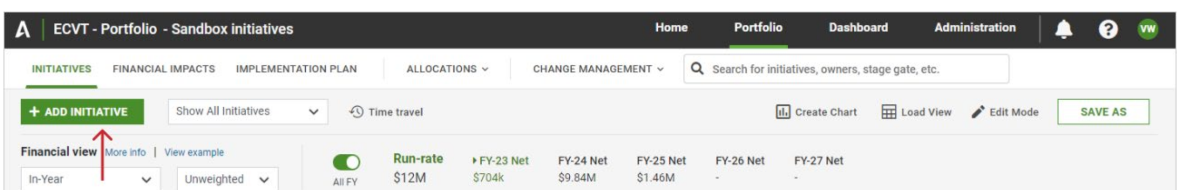
Communication: displays your most recent notifications.

What's new on ECVT: Description of the newly released features.

Initiative

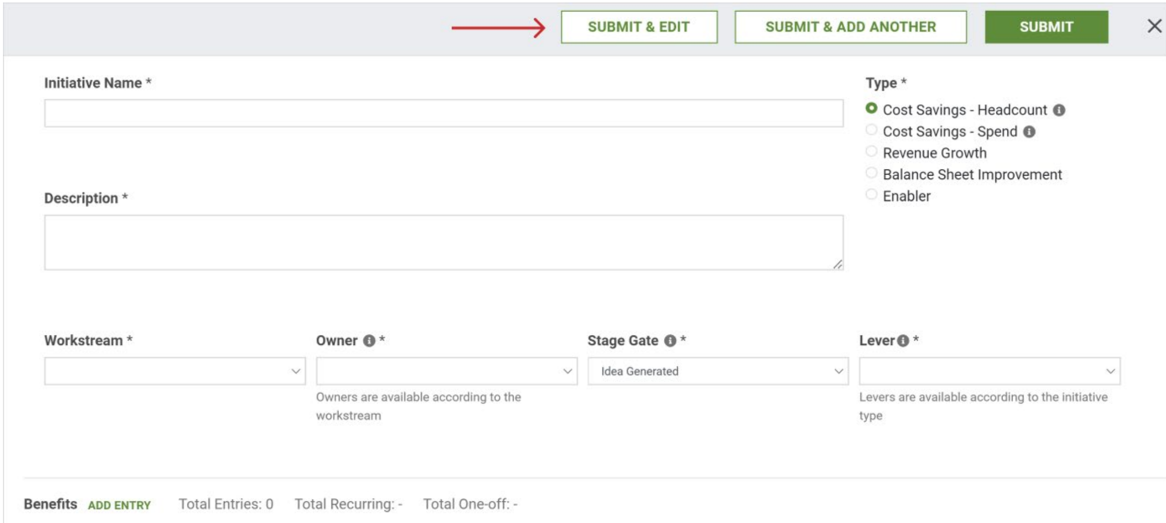
How do I create and edit an initiative?

From the portfolio view, click on the **"Add initiative"** button to create a new initiative.



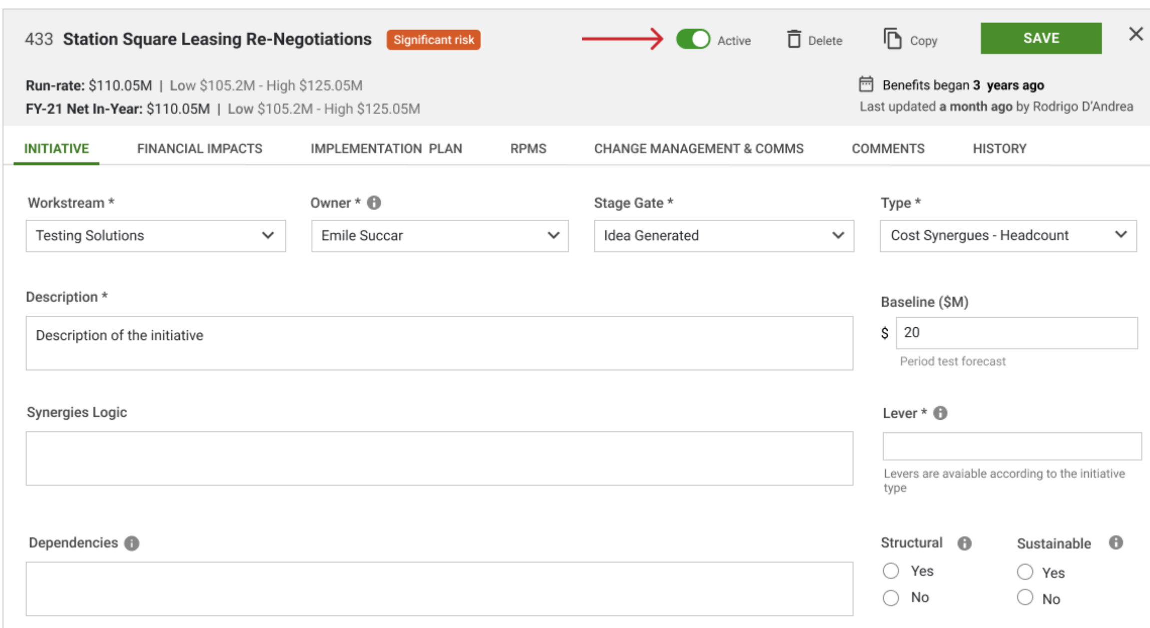
Add initiative

Fill out the **new initiative form**. Fields marked with an asterisk (*) are required. Once you have – completed the fields you can either **"Submit and edit"** (to add more information to the initiative created), **"Submit and add another"** (to save your initiative and create a new one), or "**Submit"** (the form will close, and you will find the initiative created in the Portfolio view grid).



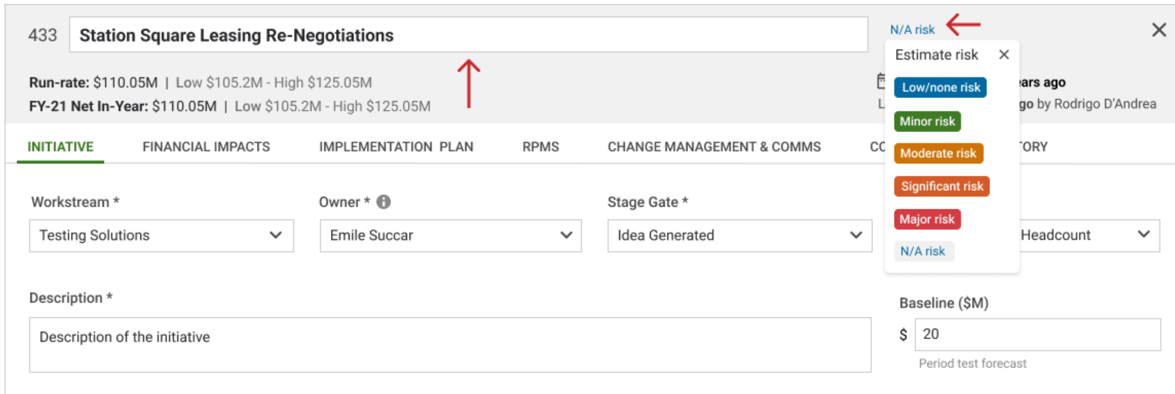
Add initiative form

Complete the information on each tab, fields marked with an asterisk (*) are required. Initiatives can be **activated/deactivated, deleted, copied, or saved** from the top right of the initiative card header.



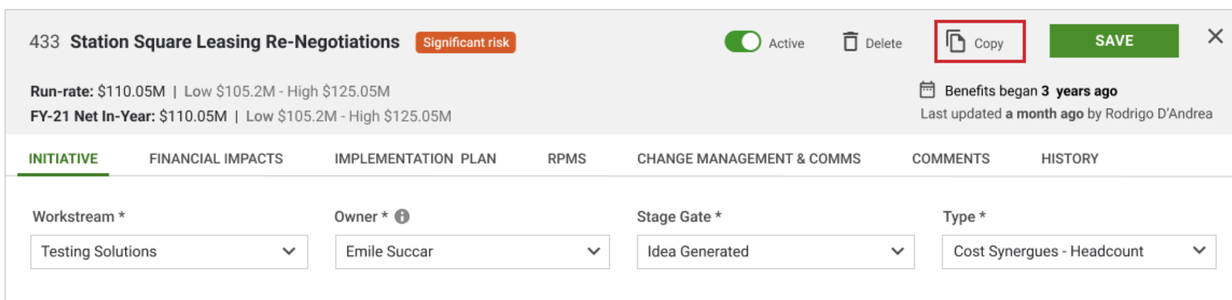
Edit initiative form

You can edit the name of the initiative by clicking on the title. Click on **"N/A risk"** to estimate the initiative risk.



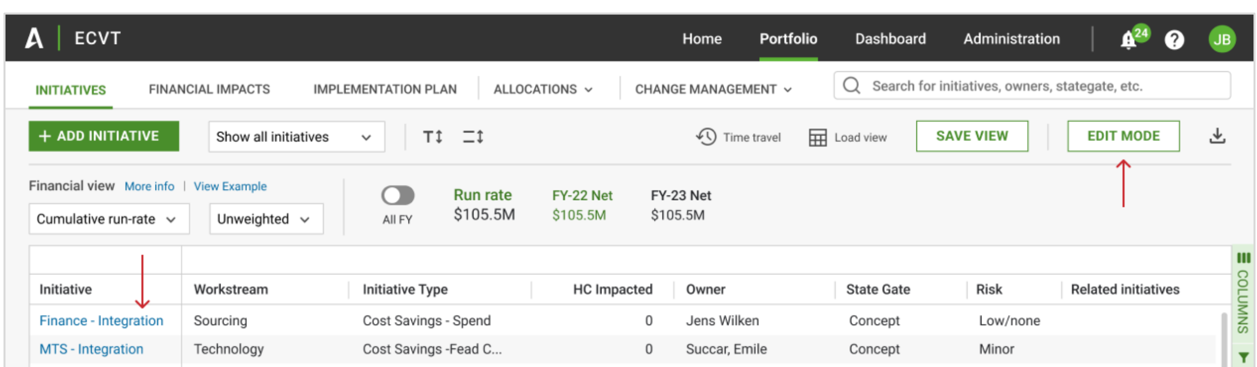
Edit name and estimate risk

You can duplicate an existing initiative and create an exact copy of it.



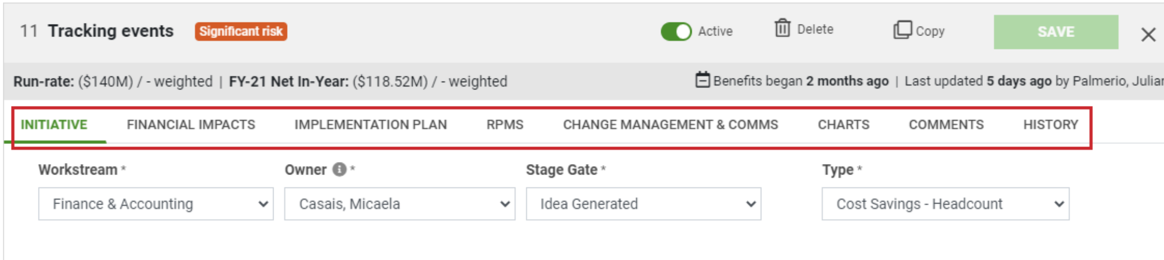
Copy initiative

To **edit an initiative from the portfolio view**, you can click on the initiative title or click "Edit mode" for mass edits.



How is the initiative card organized?

The Initiative card is divided into different sections: **Initiative**, **Financial Impacts**, **Implementation plan**, **RPMs**, **Change Management & Comms**, **Charts**, **Comments,** and **History**. You can navigate and complete each section through the tab navigation.



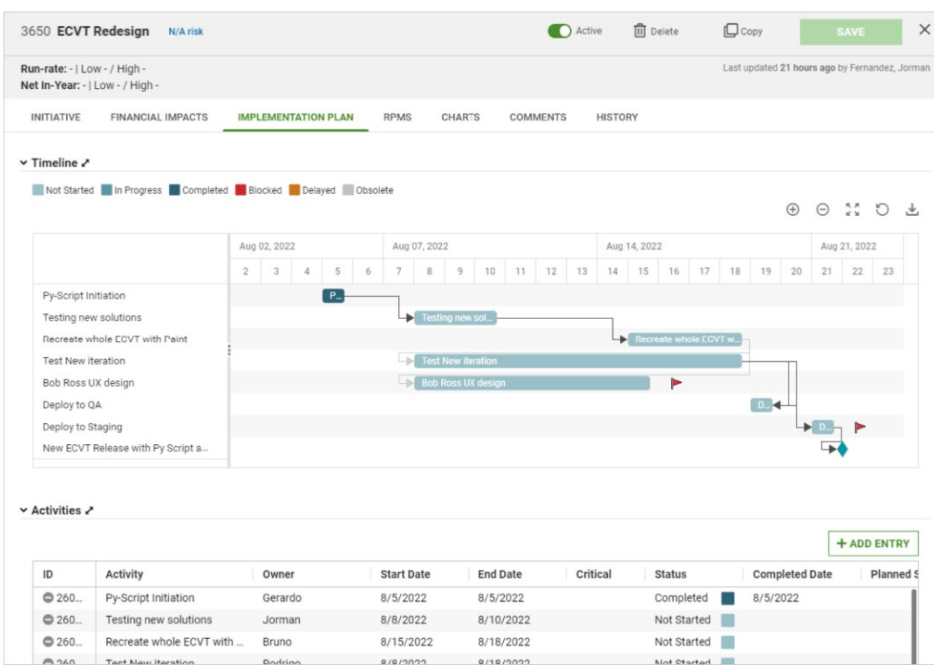
Initiative card sections

Initiative: after you have created a new initiative, complete the rest of the required fields in the Initiative tab. Enter thorough **Description**, **Savings Logic**, and **Dependencies** so that an executive will understand it without explanation, and a colleague in a different workstream would be able to read it without confusion or ambiguity.

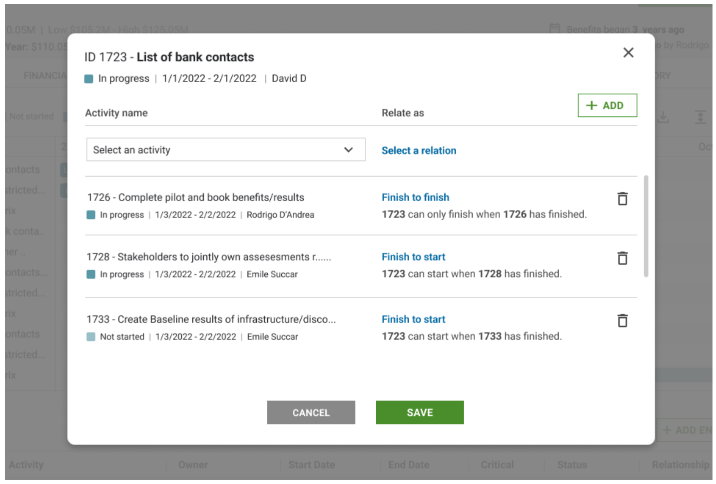
Use the **Stage Gate** as a mechanism to measure the maturity of the initiative. Enter the **Baseline** and all remaining fields with as much detail and accuracy as possible.

Financial Impacts: A **"Financial Impact"** is a direct action that will positively change the P&L as a recurring or one-off benefit or saving, and a **"Cost to Achieve"** is a one-off CAPEX or below-the-line investment required to materialize that benefit. **Add an entry** and complete the required fields of the grid to upload Savings, Synergies, and Costs to Achieve. ([Read Financial Impacts: Illustrative example](#) for more information).

Implementation plan: Add activities to define the necessary actions to complete the initiative. You can add a status and assign an owner to each activity. You can also **add a relationship** between

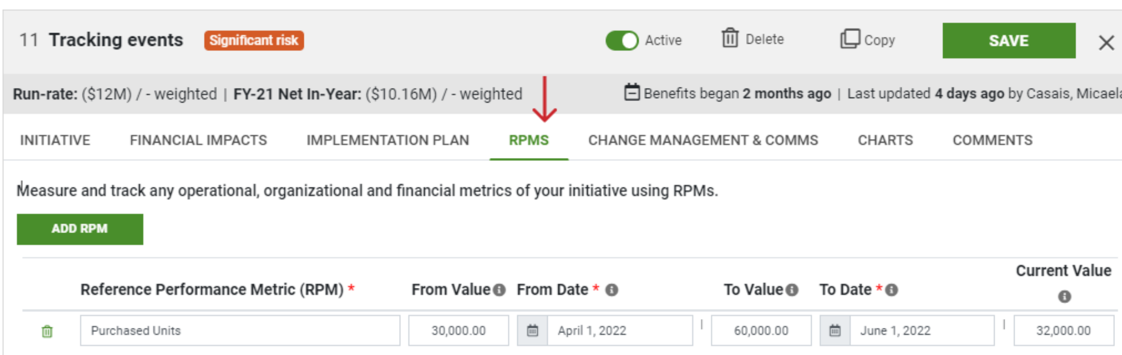


activities to define dependencies. Track the completion of the initiative from the Timeline chart. (Read Using ECVT for Project Management for more information).



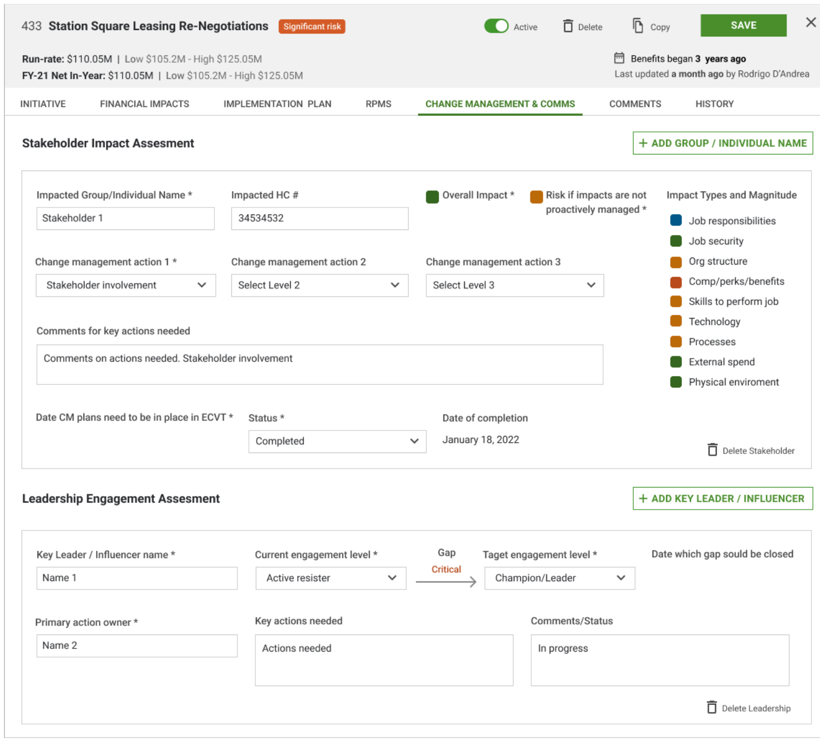
Implementation plan – relationships between activities

RPMs: An RPM is a **performance metric** that is relevant to track within an initiative. Examples of RPM are "Store Count", "Number of Contracts", or "Purchased Units" among many others.



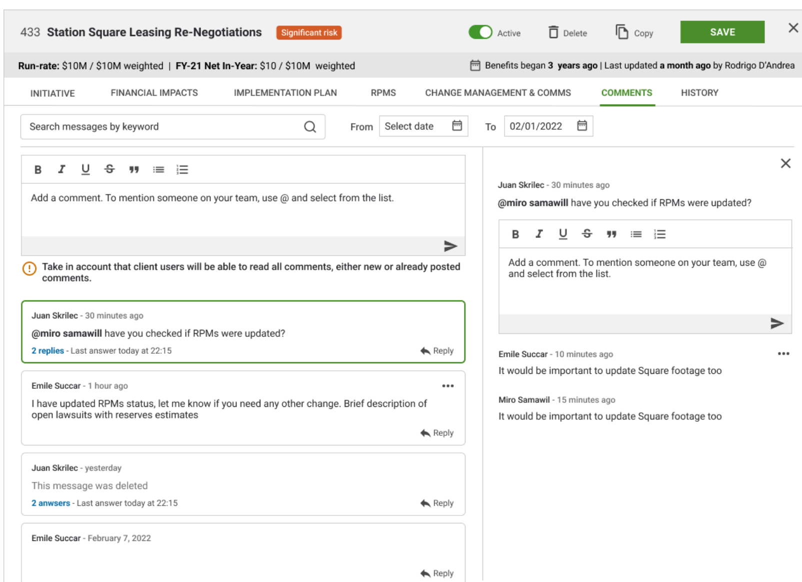
RPMs

Change Management & Comms: This is an optional section that will be available depending on the need of tracking Change Management on a particular engagement. In the **Stakeholder Impact Assessment** form, you can define which stakeholders are impacted by the initiative, how and to what extent, what are the risks if impacts are not managed, and which Change Management levers are required to address impacts. In the **Leadership Engagement Assessment** form, you can define which leaders' support is required for initiative success, what is leaders' current and targeted level of engagement and by when do gaps need to be closed. (Read Tracking Change Management & Comms for more information).



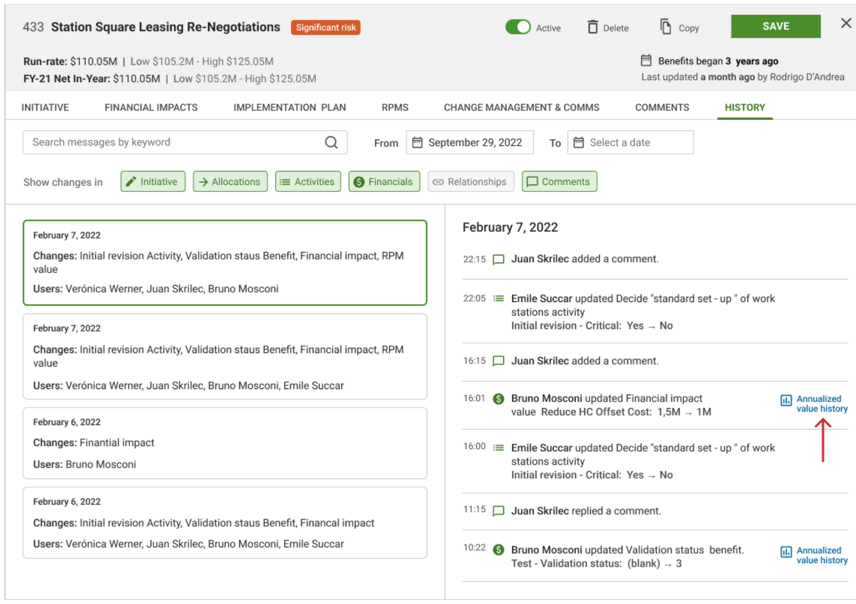
Change Management and Comms

Comments: Use the comment section to leave messages to your team members. To mention someone on your team, use @ and select from the list. You can reply to a specific message from a thread.



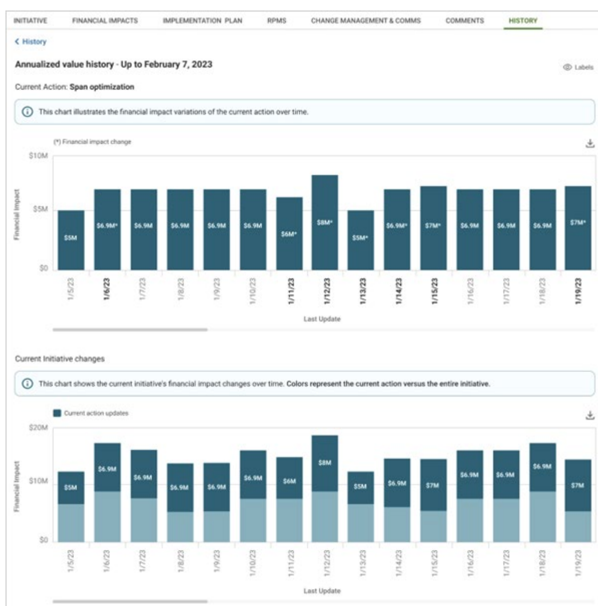
Comments

History: you can check all the changes that have been made to the initiative in the history section. The history search bar and filters will help refine the history log, and when clicking on a refined result of interest, detailed information will be shown on the additional information panel.



History

History Log charts: When clicking on the Annualized Value History link from the additional information panel, users can visualize financial impact changes over time via charts and contextualize the change as part of the overall initiative lifecycle.



Annualized Value History charts

Financial Impacts: illustrative example and loading values

A "Financial Impact" is a direct action that will positively change the P&L as a recurring or one-off benefit or saving, and a **"Cost to Achieve"** is a one-off CAPEX or below-the-line investment

required to materialize that benefit.
A quick example of a Financial Impact would be a phased Reduction in force (which is a recurring saving with a certain ramp-up) that will require spending on severance packages (a one-off Cost to Achieve).

Illustrative example: how to interpret the numbers
Initiative with 6 actions to model financial impacts.

- Savings start date is 7/1/2020
- $5M Run Rate Savings
- $2M One-off Savings
- $1M Recurring costs
- $0.5M One-off costs
- $1M CTA below the line
- $2M CAPEX.

"In-Year" reflects the actual impact only within the period it occurs, **"Pro-forma"** shows the cumulative effect starting that period and onwards, and **"Run Rate"** represents the final impact after completing the implementation.
Even though these numbers may differ, **they represent the same impacts from different standpoints:** isolated, cumulative, and end-of-program.

FINANCIAL IMPACTS	In year view (= year-over-year)			Pro-forma view (against full Run Rate)			Cumulative Run Rate view (= burn rate)		
Savings	FY 20	FY 21	FY 22	FY 20	FY 21	FY 22	FY 20	FY 21	FY 22
Recurring Savings	$2.5M	$2.5M	-	$2.5	$5M	$5M	$5M	$5M	$5M
One-off Savings	$2M	($2M)	-	$2M	-	-	-	-	-
Recurring Offset-costs	($0.5M)	($0.5M)	-	($0.5M)	($1M)	($1M)	($1M)	($1M)	($1M)
One-off Offset costs	($0.5M)	$0.5M	-	($0.5M)	-	-	-	-	-
Bottom line impact	**$3.5M**	**$0.5M**	-	**$3.5M**	**$4M**	**$4M**	**$4M**	**$4M**	**$4M**
Cost to achieve									
CTA Below the line	($1M)	-	-	($1M)	-	-	-	-	-
CAPEX	($2M)	-	-	($2M)	-	-	-	-	-
Capex/Below the line	($3M)	-	-	($3M)	-	-	-	-	-

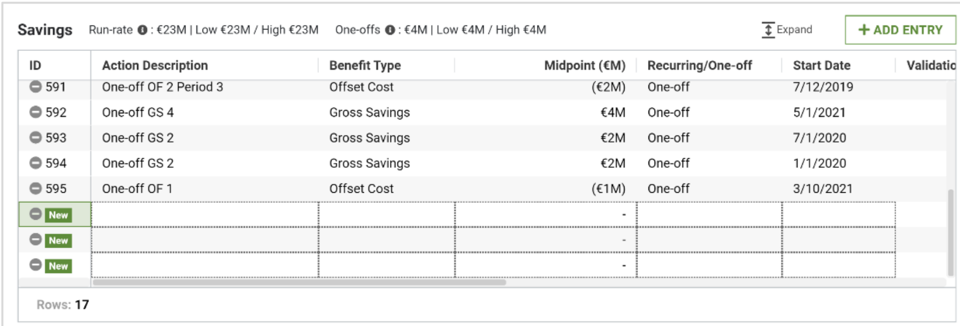
Financial Impact example

- **Financial Impacts terms Glossary:**
  - **In-Year:** Shows the incremental impact per period. This is what is expected to impact the P&L in each period - compared to a fixed baseline.
  - **Pro Forma:** Shows the cumulative in-year impact to demonstrate ramp-up over time.

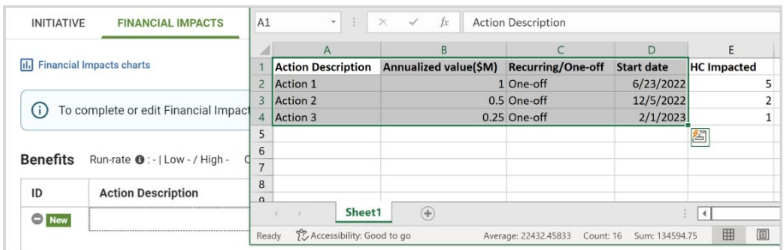
- **Cumulative Run-Rate:** This shows the run-rate value at completion of implementation – when operational changes are executed, and savings will accrue over time.
- **Run-rate:** Full-year, annualized benefits once a recurring initiative is at a steady-state.
- **Gross Savings:** Benefit Type for Cost Savings initiatives; Absolute cost out vs. baseline.
- **Offset Costs:** Costs offsetting benefits (Gross Savings, Revenue uplift, or Balance Sheet improvements) with bottom-line impact.
- **Revenue uplift:** Benefit Type for Revenue growth initiatives; Tip: Model Margin uplifts by entering Revenue uplift and Offset costs in two separate actions.
- **Balance sheet improvement:** Benefit Type for Balance sheet initiatives.
- **Net Benefits:** Net benefits are the net impact on the bottom line. Net benefits are the net of Gross Benefits (e.g., Gross Savings or Revenue uplift) and Offset costs.
- **Cost-to-achieve:** Cost-to-achieve are defined as one-off impacts without bottom-line effect (Below the line (One-off), CAPEX (One-off).
- **Below the line (One-off):** Cost-to-achieve type like severance that can be booked against a restructuring charge without affecting the statutory financial results from operations.
- **CAPEX (One-off):** Cost-to-achieve type for investments that won't fully impact the P&L in the period of the cash outlay. Tip: Model depreciation & amortization as Offset costs.
- **Recurring:** Recurring cost out vs. baseline.
- **One-off:** Non-recurring (typically not counted as transformation).
- **Stage-Gate:** Initiative's current implementation stage indicates the degree of maturity/progress.
- **Weighted:** Benefits are discounted in a weighted fashion based on the initiative's stage-gate:
  - Pre-implementation stage-gate weights: 0%.
  - Implementation stage-gate weights: Concept: 10%. Opportunity Validated: 30%. Plan Developed: 50%. Plan Approved: 65%. Execution in Progress: 80%. Implemented: 100%. Post-implementation stage gate weights: 100%.
- **Unweighted:** Benefits are calculated without using weights (all weights are 100%).

Loading Financial Impact values

You can **copy Financial Impact values** from another row or from an Excel document. To import one or more actions from Excel to Financial Impacts, **make sure your columns align with the Financial Actions table**. Add as many rows as required to match your Excel table. CTRL+V to paste in place.

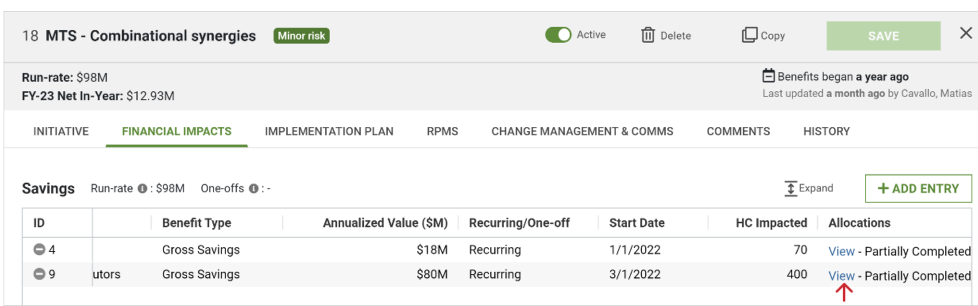


Add/Copy Financial Impacts



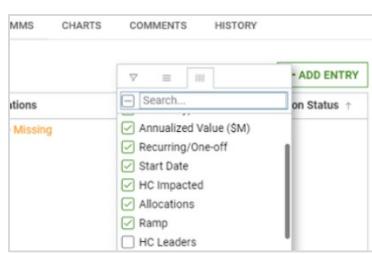
Paste data from Excel

Using Financial Allocations for Benefits and Cost to achieve: In the Financial Impacts tab of the initiative card, after you have added all the information, click "View" on the Allocations column. In the allocations modal, **make sure the information adds up to 100%, for the system to allow you to save the allocations**. You can also copy allocations from another row.



View allocations

I added an Additional attribute for Financial Impacts, but I cannot find it in the corresponding table: In your Financial Impacts table, you need to click on the hamburger icon of any column and then enable the corresponding column (which is not enabled by default).



Using multiple annualized values: From the **Admin** page, you can select between "**Annualized value**", for the Financial Impact default attribute to be tracked, or **"Midpoint and low/high range values**" for range attributes to be tracked. The name of these values can be edited to match your case. When "Midpoint and low/high range annualized values" is selected, you should **complete these values in the Financial Impact tab of the initiative card**. You must track both the ranges and the midpoint values since the midpoint is not calculated automatically. If **ramps are used**, only the midpoint should be loaded into the ramps fields and ranges values will be automatically calculated for those periods.

Using Monthly Distribution in Financial Impacts

ECVT **automatically distributes the Financial recurring actions in a 12-month even, yearly-recurrent distribution**. To **track custom distribution recurring financials**, you can choose between these options from the Administration page:

1. Distributions up to 12 months, repeating itself year after year
2. Multi-year cumulative custom distribution that will be removed in the following years (Recommended for retail engagements)

These examples depict that **using the same numbers for a distribution will produce different outcomes based on the selected choice**:

1- Distributions up to 12 months, repeating itself year after year

FI Now	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	In Year	Ann Value
FY 24										1	2	0	3	8
FY 25	2	3								1	2		5	8
FY 26	2	3								1	1			8

Benefit start month
User inputs
Automatic calculations

12 months distribution example

Value	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Annualize...
Annualized	$1M	$2M	-	$2M	$3M	-	-	-	-	-	-	-	$8M

ECVT 12 months distribution

2- Multi-year cumulative distribution which will repeat the monthly fully realized value after completion of the action

FI New	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	In Year	Ann Value
FY 24										1	2	0	3	36
FY 25	2	3	3	3	3	3	3	3	3	3	3	3	35	36
FY 26	3	3	3	3	3	3	3	3	3	3	3	3	36	36

Benefit start month
User inputs
Automatic calculations

Multi-year cumulative distribution example

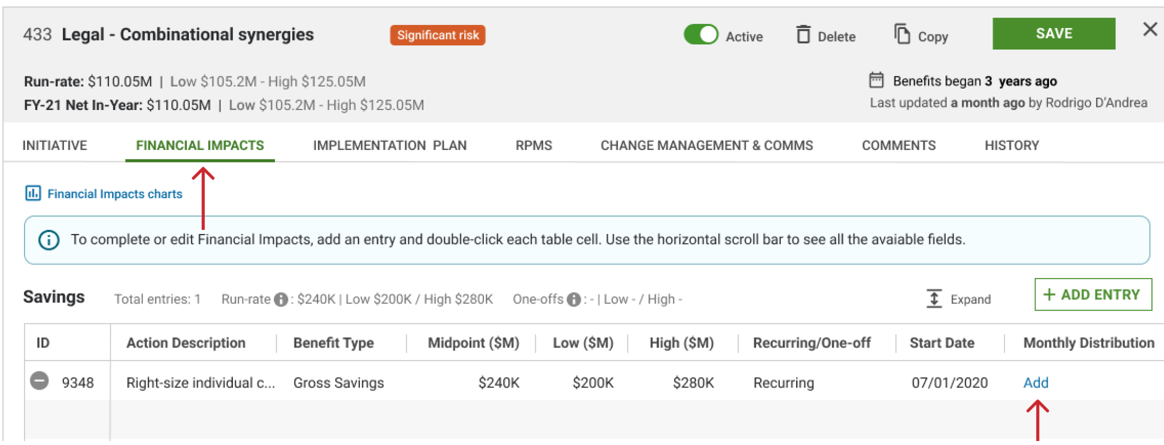
Run rate: $36M

2024	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep24	Oct-24	Nov-24	Dec-24	L12M Total
Midpoint										$1M	$2M	-	$3M

2025	Jan-25	Feb-25	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep24	Oct-24	Nov-24	Dec-24	L12M Total
Midpoint	$2M	$3	$3M	$3M	$3M	$3M	$3M	$3M	$3M	$3M	$3M	$3M	$35M

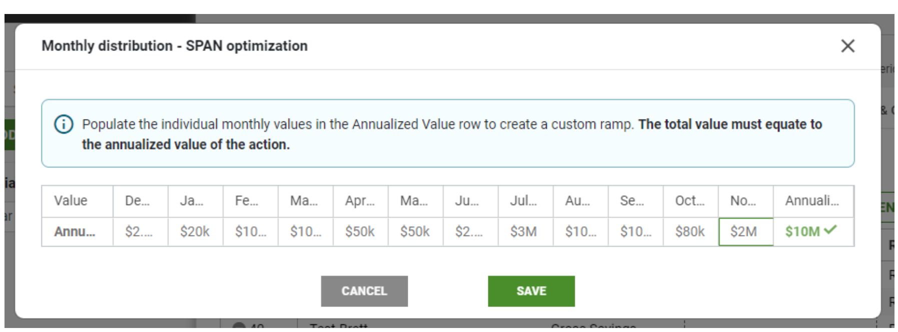
ECVT cumulative distribution

Loading monthly distribution values



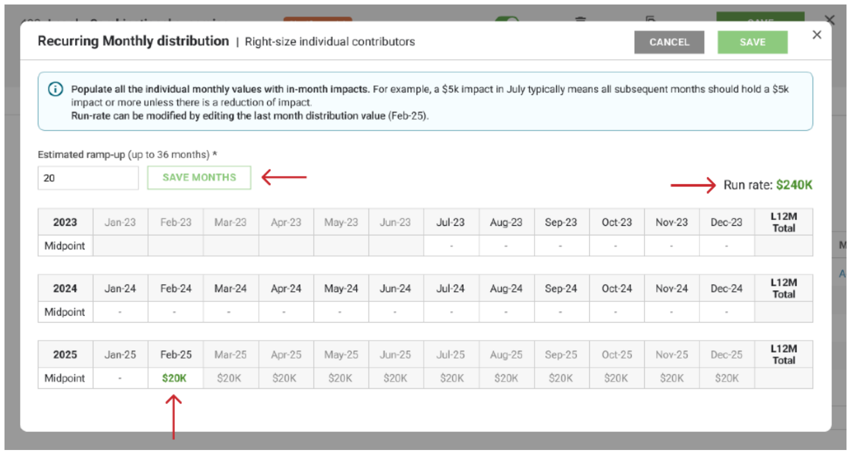
Add a monthly distribution

1- **ECVT 12-month distribution:** Populate the individual monthly values in the Annualized Value row to create a custom ramp. **The total value must equate to the annualized value of the action**. For multiple annualized values, only the midpoint should be loaded into the distribution fields, and range values will be automatically calculated for those periods.



When adding a Financial Impact, what if my ramp is more than 12 months? Is there an alternative to load a Financial Impact considering this situation? You can add a new Benefit starting by the end of the first one and complete the extra-needed ramp values in it.

2- **Multi-year cumulative distribution: Enter the estimated ramp-up months and complete the monthly values**. If the Annualized Value is already defined in the Action row, the run-rate total number will be displayed and the last cell will be populated with the result of the Annualized value divided by 12 months: If the Annualized Value is not previously defined in the Action row, the run-rate will be calculated once you complete the last editable cell of the grid.
The Annualized Value of an action with Monthly distribution can only be modified from the Monthly distribution modal. For multiple annualized values, only the midpoint should be loaded into the distribution fields, and range values will be automatically calculated for those periods.

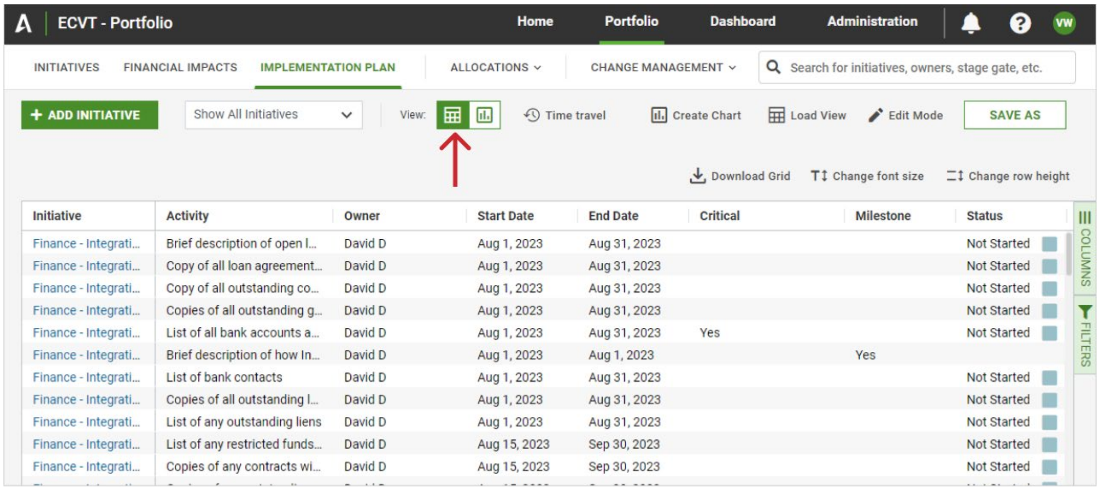


New Monthly distribution modal for Multi-year cumulative custom distribution

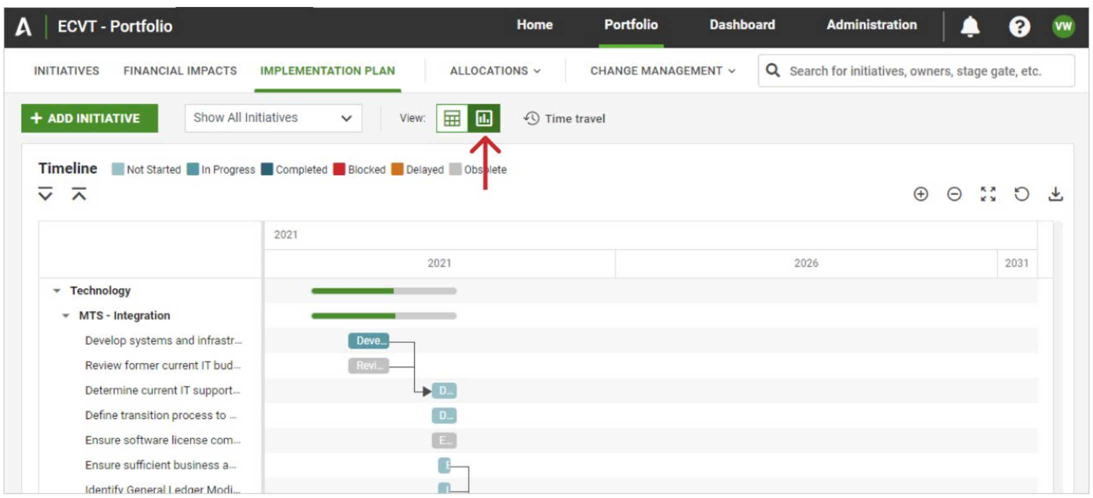
Implementation plan: Using ECVT for Project Management

These are the key functions you can utilize for **Project Management**:

- Build Implementation plans at the initiative level and **add a relationship between activities to define dependencies**.
- Add comments in the initiative card for follow-up.
- View changes in the history section to track changes.
- Look at **the implementation plan cross-project in the portfolio view**. The plan can also be visualized as a comprehensive Gantt chart for easier project planning.

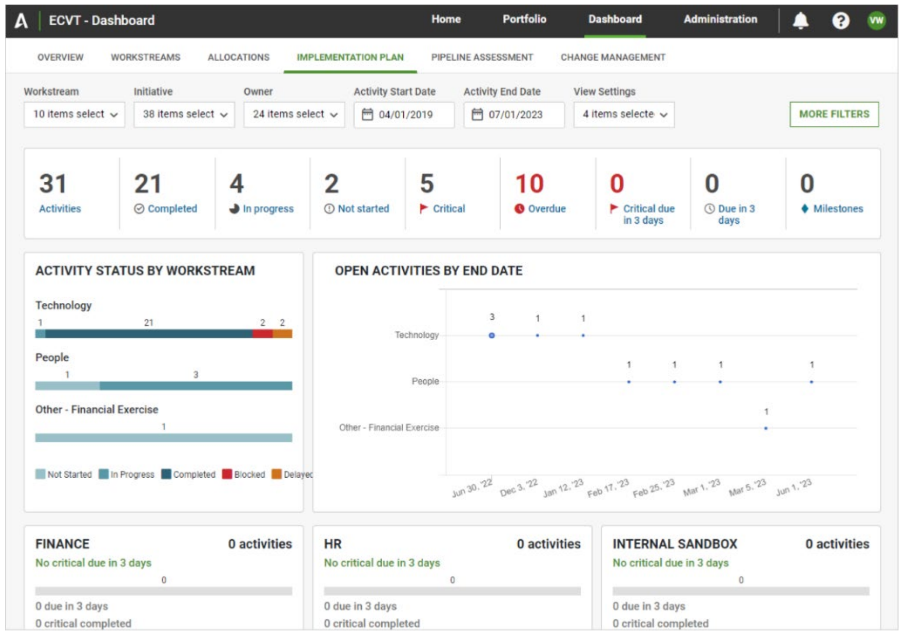


Portfolio view – Implementation plan



Portfolio view - Implementation plan - Gantt chart

- The **Implementation plan dashboards** give an overview of all the activities across the entire program and can be filtered by workstream, initiative, owner, or date.



Dashboard view - Implementation plan

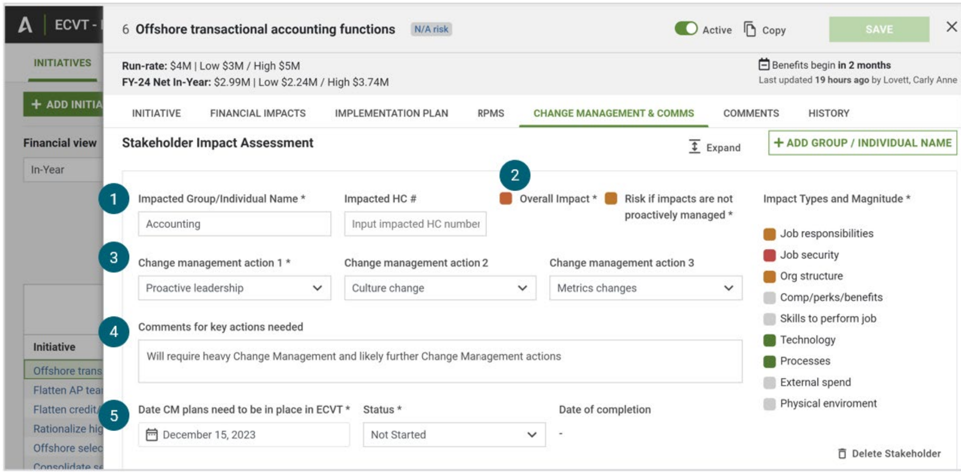
Tracking Change Management & Comms

Change Management & Communications is an optional section of the Initiative that will be available depending on the need to track Change Management on a particular engagement.

In the **Stakeholder Impact Assessment** form, you can define which stakeholders are impacted by the initiative, how and to what extent, what are the risks if impacts are not managed, and which Change Management levers are required to address impacts.

Understand, prioritize and plan to address stakeholder impacts within and across initiatives.

1. Create one “card” for each impacted stakeholder group
2. Select overall impact, risk and impact types, and assign each a level ranging from Low–Major impact
3. Select up to 3 change management actions that need to be addressed with this change
4. Denote any comments not previously listed through action steps
5. Select the date this action needs to take place and note the status of integrated Change Management plan development

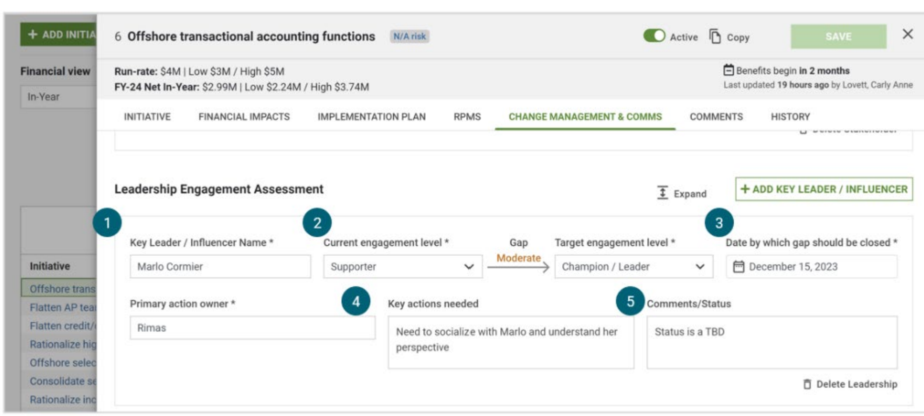


Stakeholder Impact Assessment card

In the **Integrated Leadership Engagement Assessment** form, you can define which leaders' support is required for initiative success, what is leaders' current and targeted level of engagement, and when gaps need to be closed. **Note: Given the sensitivity, access can be limited for this page**.

Identify key leaders whose engagement is critical to initiative success; assess and track the level of engagement.

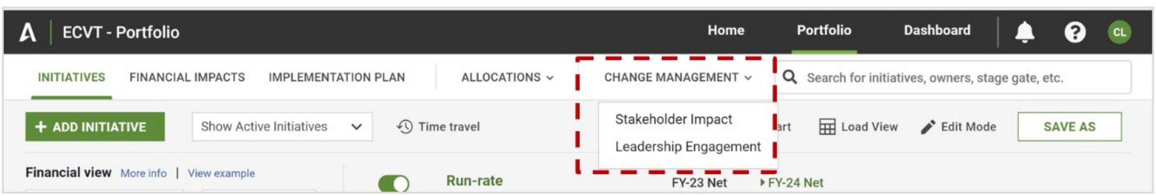
1. Create one "card" for each leader whose engagement is critical to success
2. Select the current vs. target engagement level to define the gap
3. Select the date by which this action/gap needs to be completed
4. Denote the owner for the gap closure and the key actions needed
5. Denote any comments not previously listed through action steps



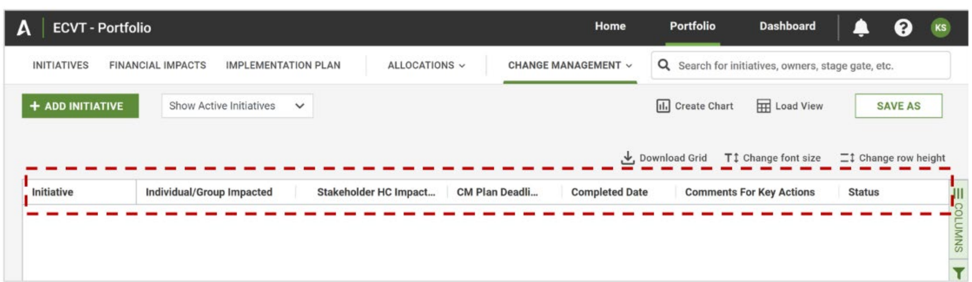
Integrated Leadership Engagement Assessment card

The Change Management drop-down can be accessed under the **Portfolio page**. The grid allows for a detailed review of each initiative and the ability to export all rows to Excel:

- Track stakeholder and leadership engagement progress by workstream – pursue gaps when needed
- Check status of plan development vs. target timing
- Zero in on major/significant impacts and risks
- Track actions in the implementation plan section
- Zero in on “red” gaps for leadership engagement assessment



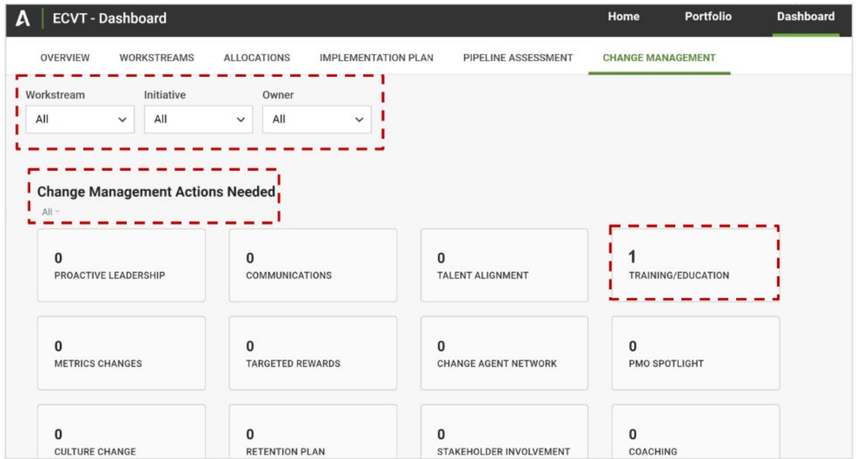
Change Management Portfolio view



Change Management grid in Portfolio view

The **dashboard** helps to aggregate and manage the Change Management initiatives:

- Provide a birds-eye view of all change management actions
- View need/demand for change management actions by type
- Align resources to change management levers with greatest need
- Filter by workstream, initiative, and owner for easier tracking

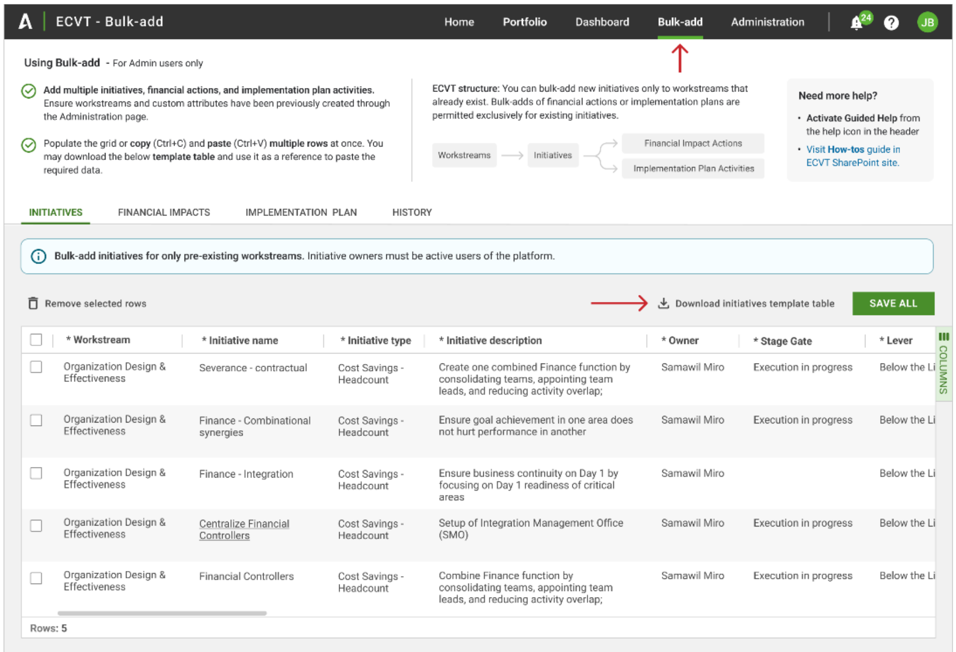


Change Management Dashboard view

Bulk-add of initiatives, actions, and activities (For Admin user only)

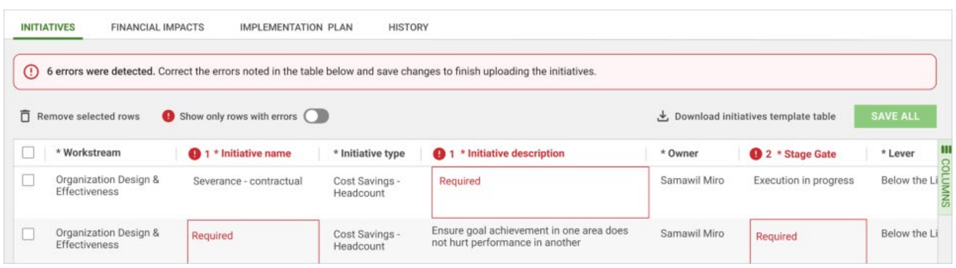
This feature will significantly boost team productivity by simplifying and streamlining the process of making mass modifications, **allowing admin users to more effectively add initiatives, financial actions, and implementation plan activities**.

- Add multiple initiatives, financial actions, and implementation plan activities. Ensure workstreams and custom attributes have been previously created through the Administration page.
- Populate the grid with data or copy (Ctrl+C) and paste (Ctrl+V) multiple rows at once.
- A template table is provided as a reference to ensure accuracy and completeness when inputting the necessary data.
- You can bulk-add new initiatives only to existing workstreams. Financial actions or implementation plan activities can be bulk-added exclusively for existing initiatives.

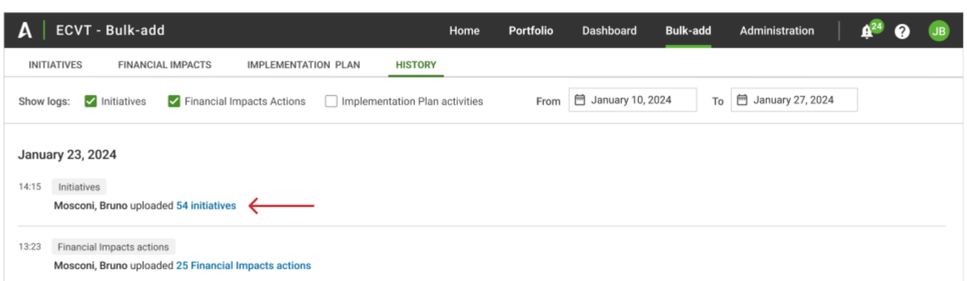


Initiatives Bulk-add grid. You can use the template table for reference.

- **Resolve bulk-add errors directly within the grid** and save data.



- Review added items in the **history log** and see the new content in the portfolio view.

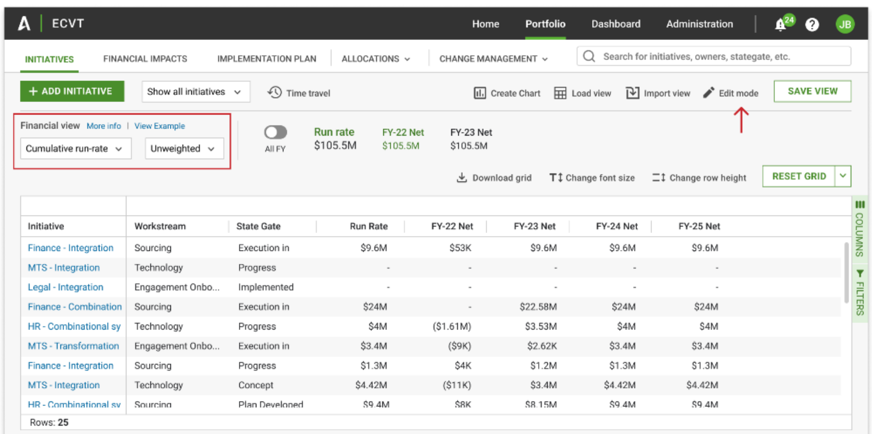


Portfolio view

Portfolio view features

The **portfolio view shows updated engagement information in a grid view**: initiatives, financial impacts, implementation plans, allocations, and change management. You can add new initiatives, change the financial view through different filters, check for previous data with "time travel" and save your customized views for a later check.

Financial views can be modified from the dropdown selection. "More info" describes each type of view and "View example" shows an illustrative example on how to interpret the numbers of these views.



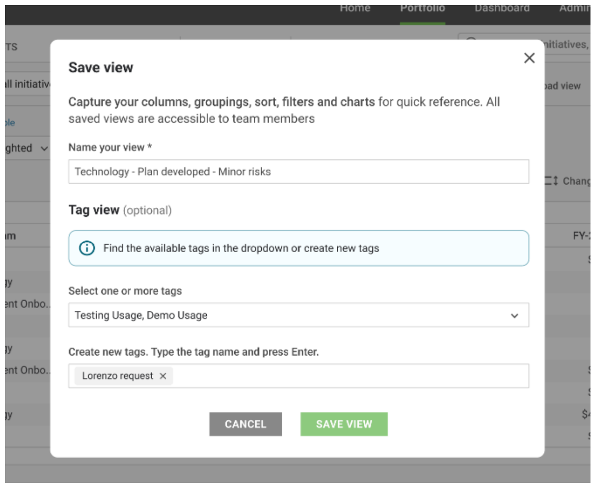
Portfolio view

Key functions / capabilities you can utilize when building a portfolio:

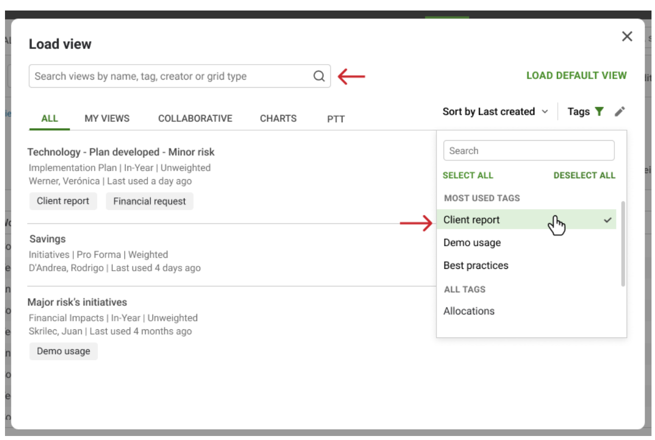
- Toggle between Initiatives, Actions, and Implementation Plan.
- Click on any blue link for an initiative to open in a modal window and display the details for that initiative.
- Copy initiatives, high-light/copy-paste!
- Make mass-edits on the portfolio page.
- Add custom attributes to specific sections on your card.
- Tailor custom attributes for workstreams.
- Customize any of these display grids by hiding, exposing, filtering, or dragging and dropping the columns in the main panel.
- Access pre-configured views by accessing the “Load Views” option or create your own and save it using “Save Views”. Tag your views for better organization.
- Load a default view with no filters or specific configurations applied.
- Save a portfolio view from one project/engagement and import it into another ECVT project.

Make mass edits: To make mass edits from the portfolio view, click the Edit mode button, copy, paste, or edit the information you need, and save. The system will validate all the required information and point you to the errors.

Save and tag Portfolio views: You can either access pre-configured views through the **Load Views**

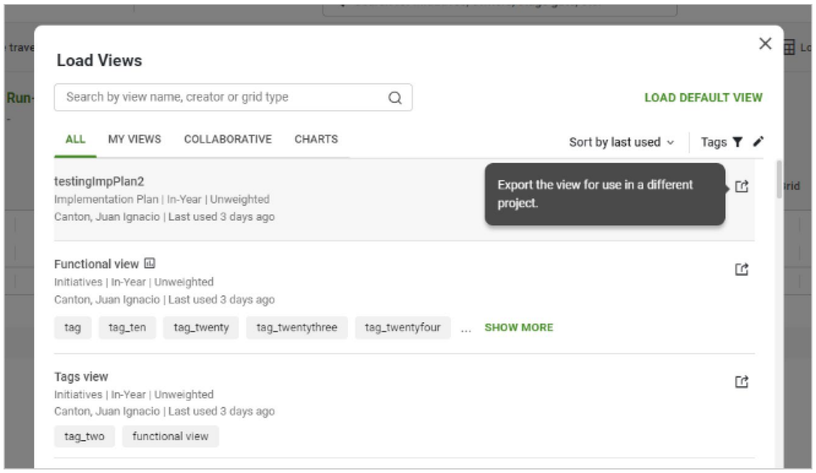


option or create your custom views and save them using **Save View**. You can create and assign **tags** when saving a portfolio view. Tags provide a dynamic way to organize and categorize saved views by facilitating easier access and enhancing collaboration.

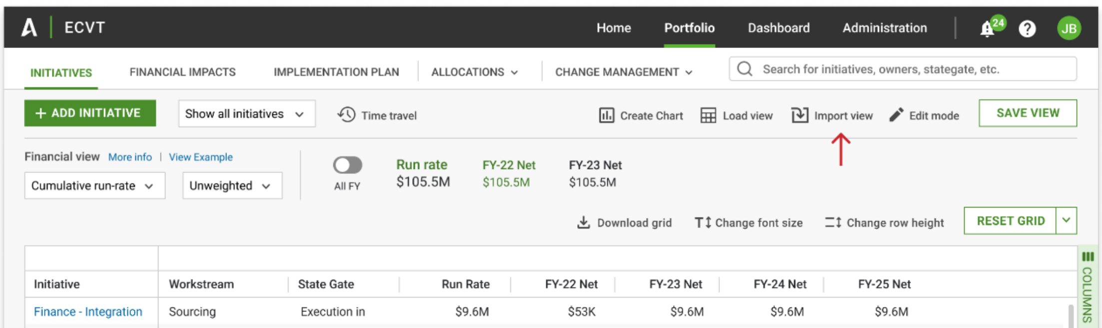


Tag your views for better organization. You can search views by tags.

Leverage existing saved portfolio views across multiple engagements: Users can save a portfolio view from one project/engagement and seamlessly import it into another ECVT project. This functionality facilitates the **reuse of preferred tailored portfolio views from past engagements**, streamlining and jump-starting the process of setting up a new ECVT.



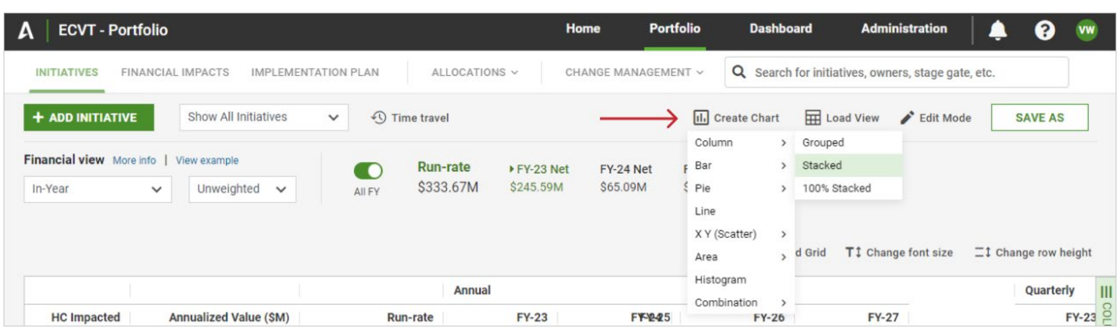
Export view



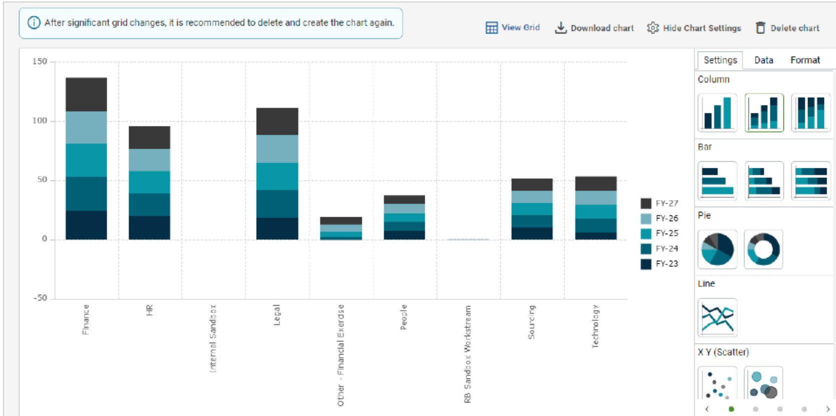
Import view

Create you own chart from a portfolio view

You can easily create your own custom charts directly from a Portfolio view, with the ability to choose from various chart types, customize data and formatting, and even download a PNG image of the chart.



Create chart from Portfolio view



View chart

Creating charts is made simple by filtering and/or entering pivot data. Once a chart is created, Chart Ranges appear in the grid, offering visual feedback by highlighting the charted categories and series data.

Workstream ↑	Run-rate	FY-23	FY-24	FY-25	FY-26	FY-27
Finance (12)	$28.23M	$24.04M	$28.23M	$28.23M	$28.23M	$28.23M
HR (15)	$18.98M	$19.59M	$18.98M	$18.98M	$18.98M	$18.98M
Internal Sandbox (12)	-	-	-	-	-	-
Legal (6)	$23.25M	$18.25M	$23.25M	$23.25M	$23.25M	$23.25M
Other - Financial Exerc... (17)	$6.5M	($195k)	$2.27M	$4.22M	$5.85M	$6.5M
People (5)	$7.5M	$7.1M	$7.5M	$7.5M	$7.5M	$7.5M
RB Sandbox Workstream (3)	$60k	$29k	$60k	$60k	$60k	$60k
Sourcing (5)	$10.35M	$9.99M	$10.35M	$10.35M	$10.35M	$10.35M
Technology (8)	$11.76M	$5.85M	$11.76M	$11.76M	$11.76M	$11.76M

View grid

After significant grid changes, it is recommended to delete and create the chart again for the data to be refreshed correctly.

The buttons located in the top right corner of the chart offer convenient options such as returning to the grid, downloading the chart, toggling the visibility of the Chart Settings Panel, and deleting the chart.

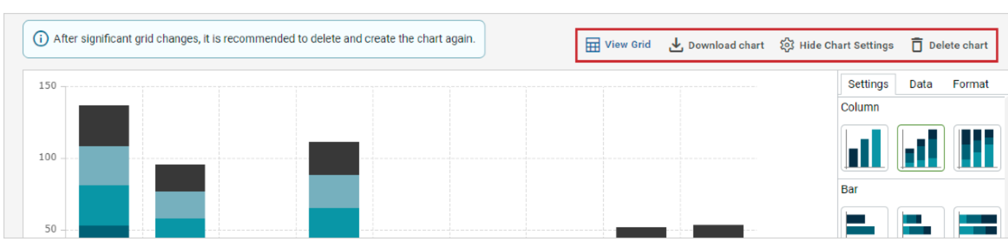
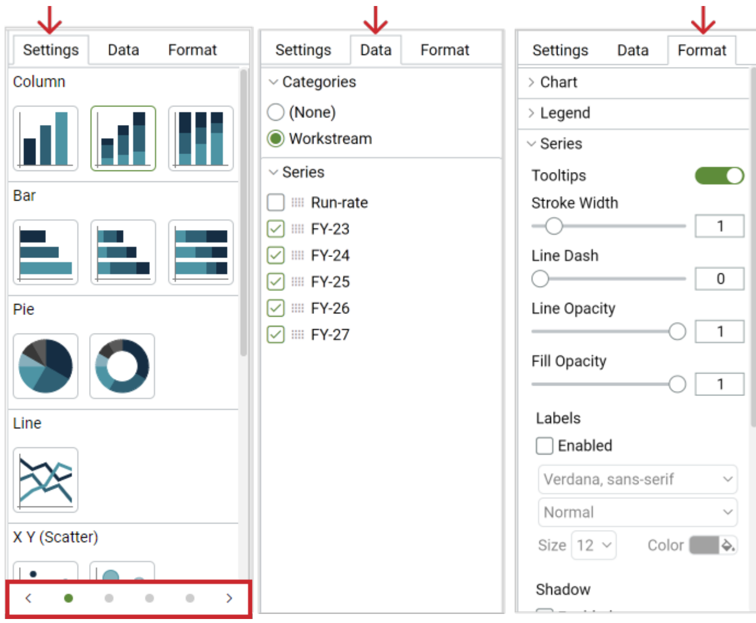


Chart options

The chart settings panel empowers users to make further modifications, including:

- Changing the chart type
- Selecting a different theme

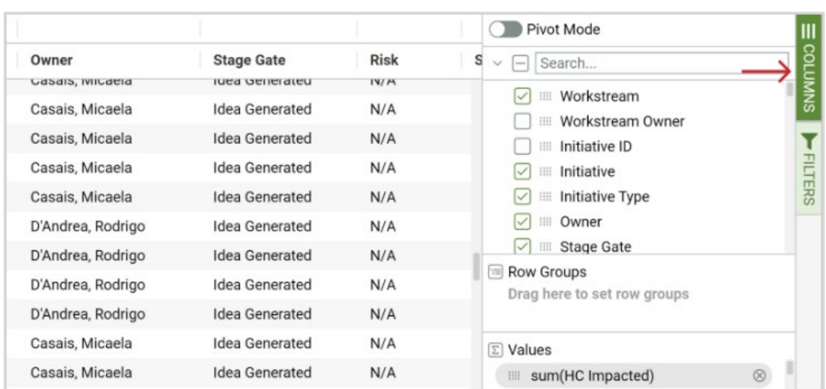
- Defining columns to be used as categories and series
- Formatting different aspects of the chart



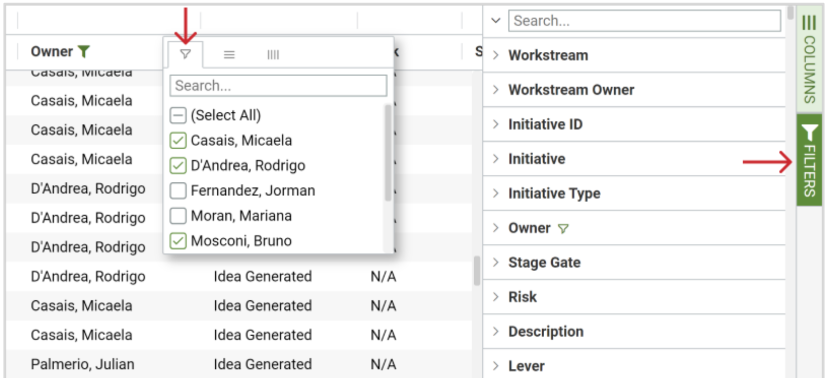
Charts settings panel

Configuration and filtering of grids

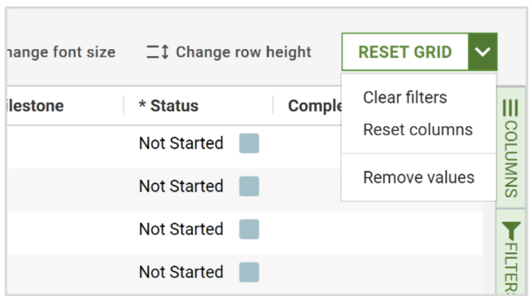
You can hide or show a specific column of the grid by clicking on the "Columns" tab at the right of the screen.



You can filter the information of each column by clicking on the "Filters" tab at the right of the screen or on the hamburger icon that appears when you mouse over the column header. You can save these filtered views.

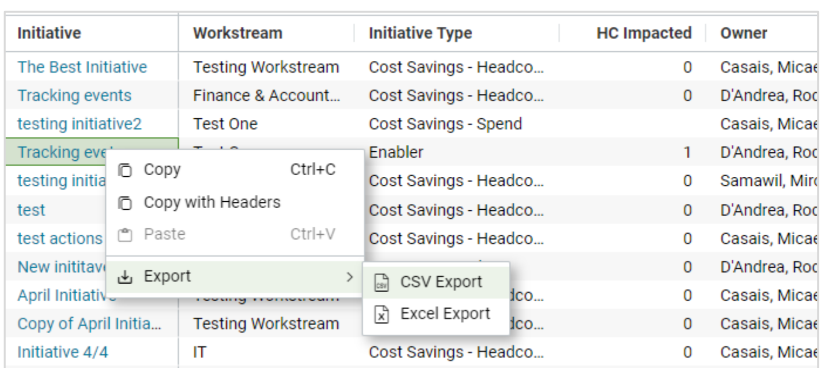


Clear applied filters, reset columns, or remove values from the Reset grid button.

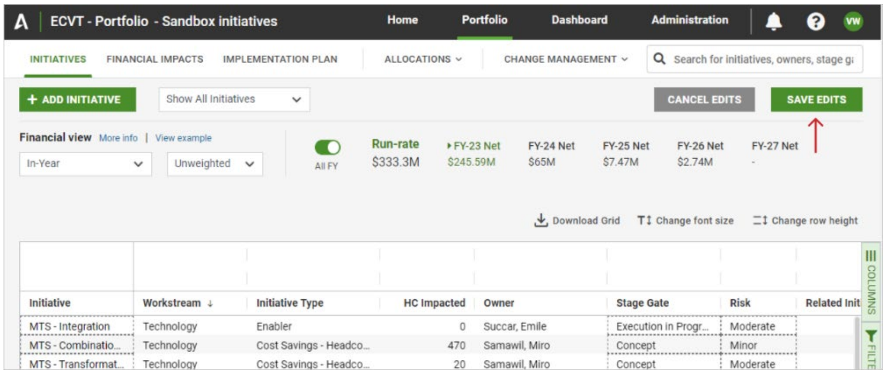


Exporting and importing from Excel

To export the content of the Portfolio view to Excel, right click on any initiative of the grid and select "Export":



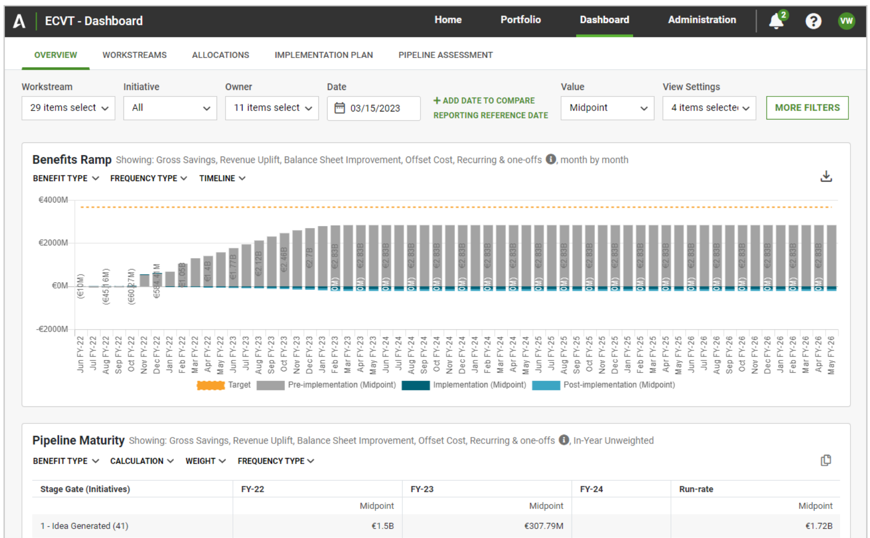
To make **mass edits** from the portfolio view, you should click on the "Edit mode" button, copy, paste or edit the information you need and save. The system will validate that all the required information is there and point you the errors.



Edit mode in Portfolio view

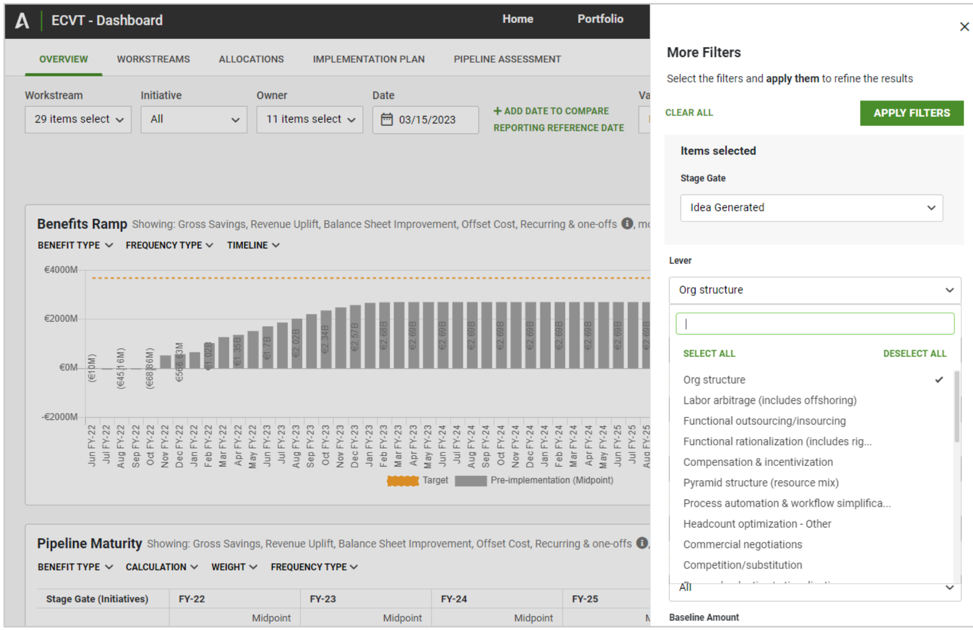
Dashboard view

The Dashboard view shows the information in a visual way through different graphs and tables. The **overview section** provides a general summary of the engagement. Workstreams, Allocations, Implementation Plan, Pipeline Assessment, and Change Management sections offer more detailed information. Charts can be downloaded in PNG format, and table information can be copied to the clipboard.



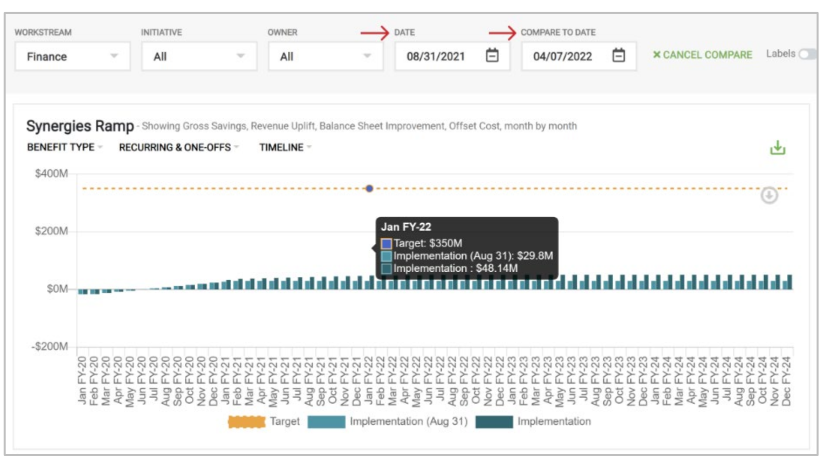
Dashboard view - Overview

Dashboard filters allow users to filter for additional standard and custom fields to further tailor their engagement Dashboards.



Common Dashboard view questions:

- **Why aren't all my initiatives showing in the Overview Dashboards?**
  Only Initiatives with at least one financial impact defined will show up in the Overview Dashboards
- **How does "Compare Date" work in the Overview Dashboards?**
  "Compare Date" allows the user to benchmark data points for a specific date against another one, which will serve as a "baseline". If you need to compare values from two different dates, select the dates in the header of the dashboard page.



- **How do I download a chart?**
  You can download the charts in PNG format from the "Download" icon at the top right of each chart.