

# i-nexus

## Version 12.1

### i-nexus Version 12.1 Summary

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**CapEx Forecasting Models** New functionality to provide forecast modelling capability for CapEx projects. Includes two standard forecast models, and the ability for each client to create and manage their own custom forecast models.

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**X-Matrix Viewing and Usability Enhancements** Enhanced viewing capabilities:

- Hide Objectives that do not belong to the currently selected theme.
- See an alternative User's 'My Objectives' view.
- New objectives automatically assigned to the currently viewed strategic theme.
- New action grouping for strategic themes related functionality.
- Improved action names.
- New select all/ unselect all actions within the Custom Manage Visible Objectives window.

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**Multi-Select Transactions** Four new actions added to opportunity & project benefits/costs that provide the ability to select multiple transactions in a single click to facilitate transactions processing.

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**Transaction Redistribution** Ability for a user to redistribute existing transactions values over new time periods.

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**Promote Opportunity & Transactions Processing** Enhanced opportunity promotion process that gives the user the ability to process the transfer of opportunity benefits/costs transactions (Copy, Redistribute, Split) to a project within the promote opportunity wizard.

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**Performance Improvements** We continue to monitor performance and strive to provide continuous improvement. This release contains three performance improvements of particular note:

- Table views load more quickly. This is most noticeable on a slower internet connection.
- Pages with many tabs take less time to display
- Jump menus display faster, providing a more responsive user experience

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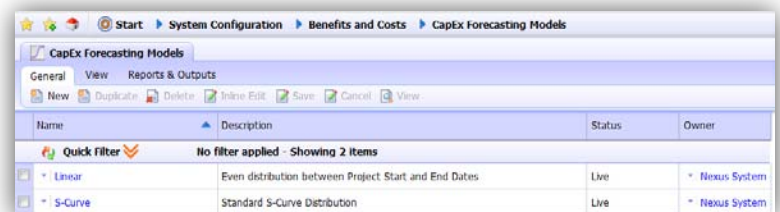
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### New Features in Version 12.1

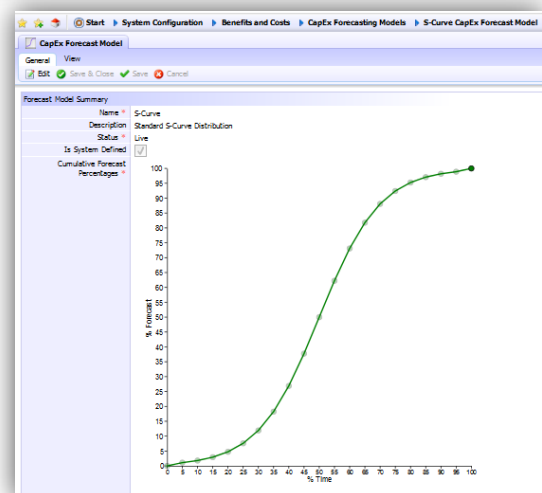
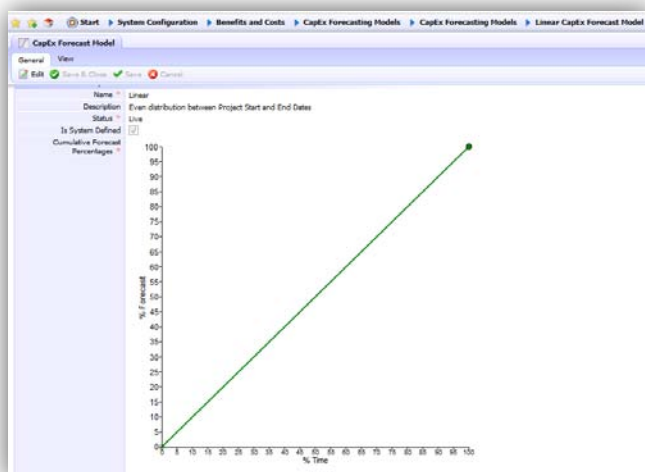
#### Introducing Capital Planning Forecasting Models

**i-nexus 12.1** introduces the concept of Forecasting Models for use in CapEx projects.

i-nexus now comes with two standard Forecasting Models (Linear & S-Curve) and the ability to create custom forecasting models.

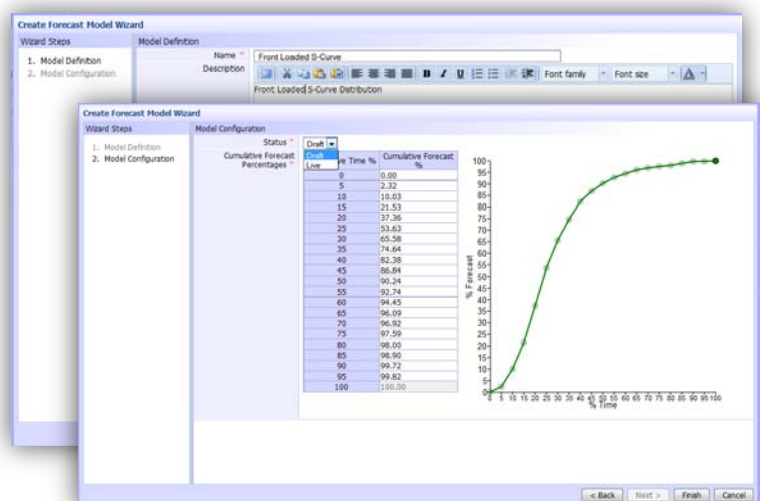


Name	Description	Status	Owner
Linear	Even distribution between Project Start and End Dates	Live	Nexus System
S-Curve	Standard S-Curve Distribution	Live	Nexus System



New models can be created from a blank model or by duplicating an existing forecast model. The status of a new model can be set to 'Draft' or 'Live'. Only Live models will be available for use with CapEx projects. Live Models can also be retired. Retiring a forecast model does not affect any existing projects using it.

The Create Forecast Model Wizard enables the definition of a forecast model by assigning Cumulative Forecast as percentage values against the Cumulative Time in percentage values. This is represented by a dynamic chart within the wizard which will illustrate the forecast model as defined by the values entered. The chart is interactive and allows direct

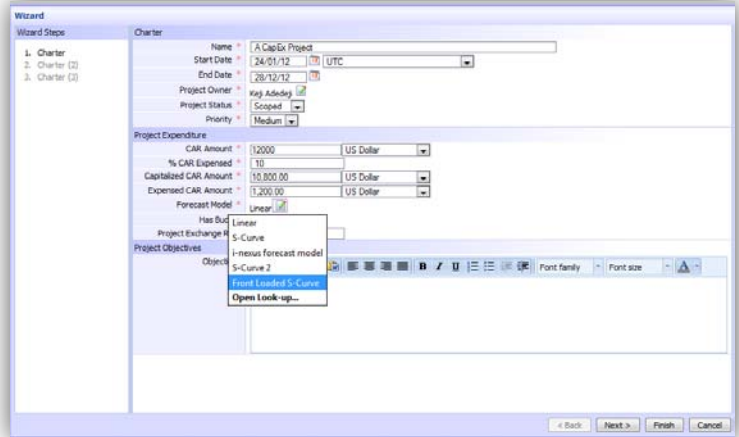


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manipulation by dragging and dropping the points on the chart to update the Cumulative Forecast % values.

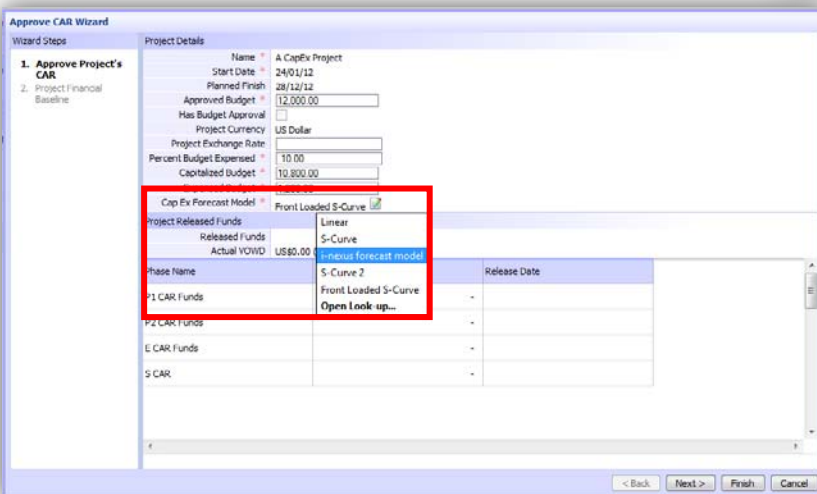
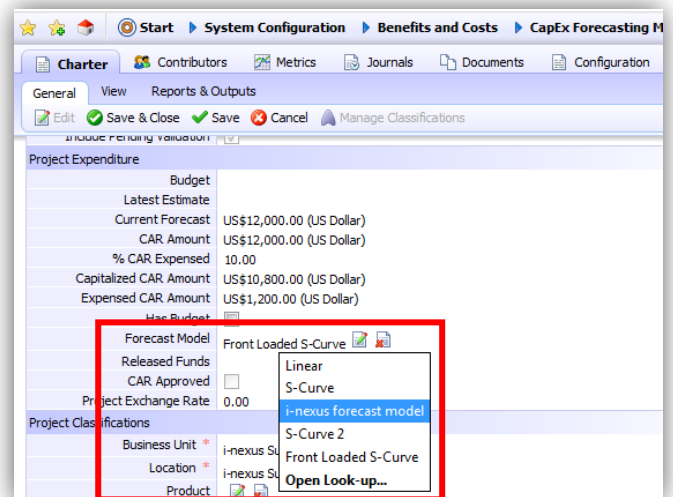
When a user creates a CapEx project, they can select the Forecast Model that they want to apply. Only forecast models with a 'Live' status are available for selection.



Changing an existing CapEx Project's Start/End dates or the CAR Amount will initiate a calculation of the new forecast distribution.

It is also possible to change the forecast model of an existing project either from the Project Charter or the Release CAR wizard which will calculate the new forecast distribution.

Changing the project's start/end dates, CAR amount or forecast model will apply the new forecast distribution from the last actual value entered forwards. Where no actuals have been entered, the new distribution will be applied across the project. This also applies where a project's



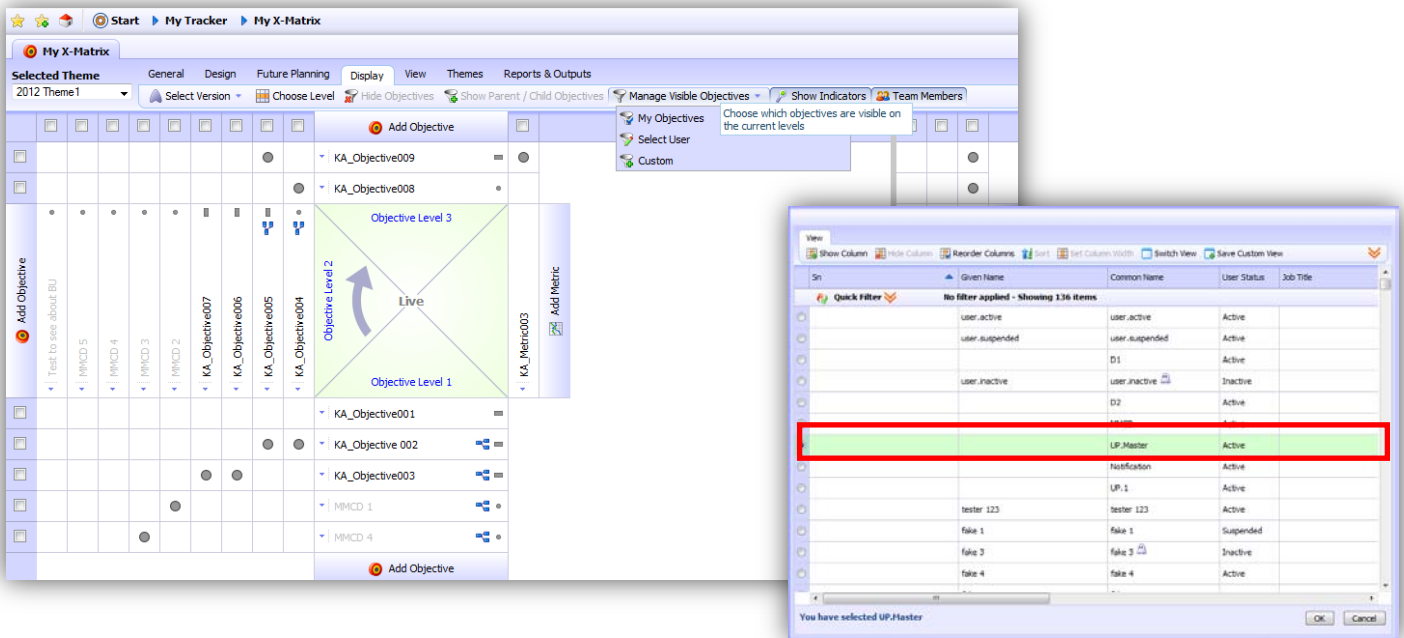
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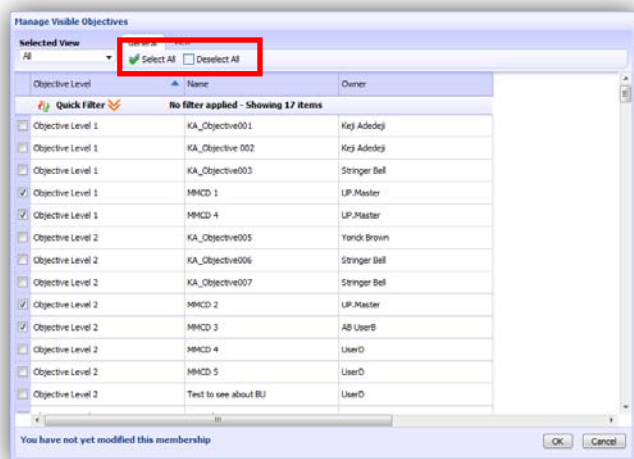
### Introducing X-Matrix Viewing Enhancements

12.1 provides greater viewing capabilities to X-Matrix users.

Users can now choose to manage the visible objectives within the X-Matrix by selecting a new option called 'Select User'. This appears as a new option in the new 'Manage Visible Objectives' action drop down in the Display action tab. The 'Manage Visible Objectives' grouping contains three options; 'My Objectives' (previously an independent action), 'Select User' and 'Custom' (previously called Manage Visible Objectives)



The new Select User option gives the user the ability to select another user from a user look-up. The X-Matrix will reset the X-Matrix to show the selected user's 'My Objectives' view. Standard security rules apply so that restricted objectives will not be visible.



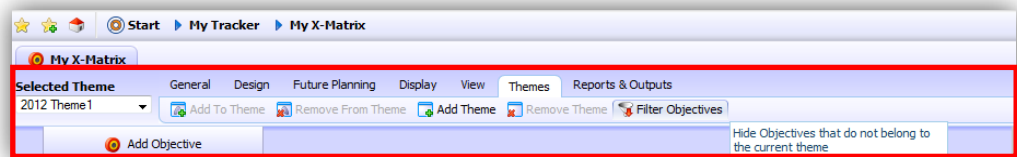
Two new actions have been added to the 'Custom' Manage Visible Objectives window to speed the process of selecting multiple objectives. Select All and Unselect All allow the User to select or unselect all of the objectives within the Manage Visible Objectives table.



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Users can now choose to filter visible objectives by a strategic theme. This is an enhancement to the existing Selected View functionality (renamed in 12.1 to Selected Theme) that highlights the visible objectives that relate to a specific strategic theme.



The Filter Objectives button allows the user to toggle the behavior of the Selected Theme drop down between highlight and filter. When enabled, the objectives that do not belong to the selected theme are hidden. When the filter objectives toggle is disabled, the X-Matrix will grey out objectives that do not relate to the chosen theme.

The new action has been added to a new action tab grouping called 'Themes'.

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### Introducing Multi-Select Transactions Actions

It is now possible to select multiple transactions using four new action buttons in the Benefits/Costs Transactions action tab. These actions are available to both opportunity and projects users:

- Select All – expands and selects all transactions in the current view
- Select Children – expands and selects the child transactions of one or more checked transactions in the current view
- Select Descendants – expands and selects all descendant transactions of one or more checked transactions in the current view
- Clear Selection – unchecks all selected transactions in the current view

Selected transactions can be processed using the other action buttons within the Transactions tab.

The screenshot displays the i-nexus software interface for the 'Benefits / Costs' section. The 'Selected View' is set to 'KAProfit'. The 'Transactions' sub-tab is active, showing a list of transactions with columns for Indicators, Transaction Record, UOM, Business Unit, % Variance, Full Total, Budget, Forecast, and Actual. The 'Quick Filter' is set to 'No filter applied'. The 'Transactions' sub-tab contains four action buttons: 'Select All', 'Select Children', 'Select Descendants', and 'Clear Selection'. The 'KATransProjCost1' and 'KATransProjCost2' transactions are highlighted in green, indicating they are selected.

Indicators	Transaction Record	UOM	Business Unit	% Variance	Full Total	Budget	Forecast	Actual
	KAProfit							
	KACosts							
	KAProjectCosts							
	KALabourCosts							
	KATransCosts1							
	KATransCosts2							
	KABenefits							
	KAREvenue							
	KATransProjCost1		i-nexus Support		5,000.00			
	KATransProjCost2		i-nexus Support		1,000.00			
	KATransProjCost1		i-nexus Support		5,000.00			
	KATransProjCost2		i-nexus Support					
	KALabourCosts							
	KATransLabour1		i-nexus Support					
	KATransCosts1		i-nexus Support		2,000.00			
	KATransCosts2		i-nexus Support					
	KABenefits							
	KAREvenue							

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### Introducing Redistribute Transactions

**i-nexus 12.1** enables the redistribution of project transactions values. A new 'Redistribute' action button is present in the Transactions action tab. This button will launch the Redistribute Wizard.

The screenshot shows the i-nexus software interface with the 'Redistribute' button highlighted in the Transactions action tab. The interface includes a navigation bar, a menu bar, and a main data table. The table has columns for Transaction Record, UOM, Business Unit, % Variance, Full Total (Budget, Forecast, Actual), and monthly data for Mar-2011 and Apr-2011 (Budget, Forecast, Actual). The 'Redistribute' button is located in the Transactions action tab, which is highlighted in red.

Transaction Record	UOM	Business Unit	% Variance	Full Total			Mar-2011			Apr-2011		
				Budget	Forecast	Actual	Budget	Forecast	Actual	Budget	Forecast	Actual
<b>Quick Filter</b>												
<input type="checkbox"/> KAProjectTools				-	-	-	-	-	-	-	-	-
<input checked="" type="checkbox"/> Cost Transaction 1	£	i-nexus Support		12,000.00	12,000.00	-	1,000.00	1,000.00	-	1,000.00	1,000.00	-
<input type="checkbox"/> KALabourCosts				-	-	-	-	-	-	-	-	-
<input type="checkbox"/> Benefits				-	-	-	-	-	-	-	-	-
<input type="checkbox"/> KARevenue				-	-	-	-	-	-	-	-	-
<input type="checkbox"/> KASales				-	-	-	-	-	-	-	-	-
<input checked="" type="checkbox"/> Transaction 1	£	i-nexus Support		12,000.00	12,000.00	-	1,000.00	1,000.00	-	1,000.00	1,000.00	-
<input type="checkbox"/> KATaxReturns				-	-	-	-	-	-	-	-	-

This wizard looks and feels very much like the Distribute Wizard. The main difference within the wizard, is that the total transactions value for the Budget, Forecast or Actual Values are defaulted into the Redistribute Wizard.

The screenshot shows the 'Redistribute Transaction Value' wizard. The 'Parameters' section is active, and the 'Date Range' field is highlighted with a red box. The 'Date Range' field shows 'Start: Mar-2011' and 'Finish: Feb-2012'. The 'View' section shows a table with two items: 'Cost Transaction 1' and 'Transaction 1', both with a budget of 12,000.00.

Name	Unit Of Measure	Budget
Cost Transaction 1	Great British Pou...	12,000.00
Transaction 1	Great British Pou...	12,000.00

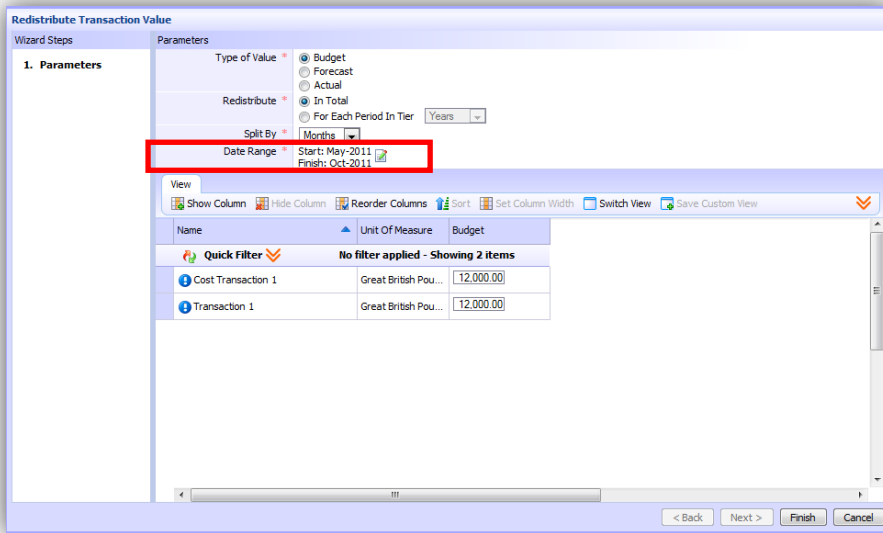
The fundamental difference between Redistribute and Distribute is what happens after the wizard has been submitted.

Redistribution enables the user to redistribute the existing financial value over a new period of time and deletes any previous values which fall outside of the new distribution time period.

In this example, a 12 month project from May-2011 to Feb-2012, which has transaction values for every period in the project's lifetime, is being redistributed.

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The project's total Budget transaction values are being redistributed over a 6 month period between May-2011 and Oct-2011.

After the transaction values are redistributed, the new distribution is applied to the new periods and previous transaction values outside of the redistribution date range are nulled. This can be seen in the before & after views below.

### Before Redistribution

Transaction Record	UOM	Business Unit	Full Total		Mar-2011			Apr-2011			May-2011			Jun-2011			Jul-2011		
			Budget	Forecast	Budget	Forecast	Actual	Budget	Forecast	Actual	Budget	Forecast	Actual	Budget	Forecast	Actual	Budget	Forecast	Actual
<b>Quick Filter</b> No filter applied - Showing 2 items																			
KAProjectTools			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Cost Transaction 1	£	i-nexus Support	12,000.00	12,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	
KALabourCosts			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
ABenefits			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
KARevenue			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
KASales			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transaction 1	£	i-nexus Support	12,000.00	12,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	
KATaxReturns			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

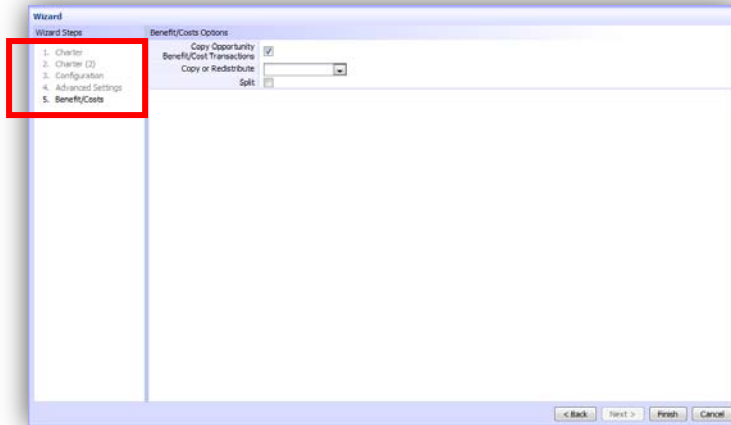
### After Redistribution

Transaction Record	UOM	Business Unit	Full Total		Mar-2011			Apr-2011			May-2011			Jun-2011			Jul-2011		
			Budget	Forecast	Budget	Forecast	Actual	Budget	Forecast	Actual	Budget	Forecast	Actual	Budget	Forecast	Actual	Budget	Forecast	Actual
<b>Quick Filter</b> No filter applied																			
KAProjectTools			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Cost Transaction 1	£	i-nexus Support	12,000.00	12,000.00	-	1,000.00	-	1,000.00	2,000.00	1,000.00	2,000.00	1,000.00	2,000.00	1,000.00	2,000.00	1,000.00	2,000.00	1,000.00	
KALabourCosts			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
ABenefits			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
KARevenue			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
KASales			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transaction 1	£	i-nexus Support	12,000.00	12,000.00	-	1,000.00	-	1,000.00	2,000.00	1,000.00	2,000.00	1,000.00	2,000.00	1,000.00	2,000.00	1,000.00	2,000.00	1,000.00	
KATaxReturns			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

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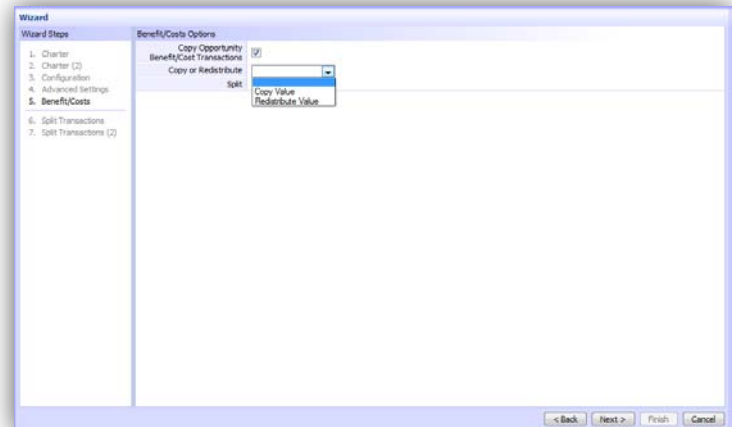
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### Introducing Promote Opportunity Transactions 'Daisy Chain'



**i-nexus 12.1** introduces the ability to Copy, Redistribute and/or Split project transactions during the opportunity promotion process. The Promote Opportunity wizard can now be configured to automatically launch the Copy, Redistribute or Split wizards after the opportunity has been promoted without having to leave the promote opportunity wizard.

The promote opportunity wizard can also be configured to present the user with the option to select which transactions actions they would like to perform after promoting the opportunity.



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Wizard

Wizard Steps

1. Charter
2. Charter (2)
3. Configuration
4. Advanced Settings
5. Benefit/Costs
6. Redistribute Transactions
7. Split Transactions
8. Split Transactions (2)

Charter

Name: Line Efficiency Plot - Project 1

Start Date: 26/01/12 UTC

Project Owner: Key Adeleye

Project Status: Scoped

Priority: Medium

Project Objectives

Objectives

Project Classifications

Business Unit: i-nexus Support UK

Location: i-nexus Support HK

Product: i-nexus Support HK

Impacted Process: Programme

Best Practice

Based On Project: Best Practice

Wizard

Wizard Steps

1. Charter
2. Charter (2)
3. Configuration
4. Advanced Settings
5. Benefit/Costs
6. Redistribute Transactions
7. Split Transactions
8. Split Transactions (2)

Parameters

Type of Value: Budget

Forecast

Actual

In Total

For Each Period In Tier: Years

Redistribute

Split By: Months

Date Range: Start: Jan-2012, Finish: Dec-2012

View

Show Column

Quick Filter

BCP Transaction1

BCP Transaction2

BCP Transaction3

BCP Transaction4

BCP Transaction5

Wizard

Allocation: 100%

View

Show Column Hide Column Reorder Columns Sort Set Column Width Switch View Save Custom View

Transaction Record

UOM % Allocation

Quick Filter

No filter applied - Showing 5 items

BCP Transaction1 (On Planned Finishe...	Great British Pou...	100%
BCP Transaction2 (W/ Project Start /...	Great British Pou...	100%
BCP Transaction3 (Specified no. of Cal...	Great British Pou...	100%
BCP Transaction4 (No BCP)	Great British Pou...	100%
BCP Transaction5 (No BCP)	Great British Pou...	100%

Name % Allocation

KA

Quick Filter

Apply Clear

Filter applied - Displaying 3 of 65 items

KARJ1	
KABU1.1	50
KABU1.2	50

< Back Next > Finish Skip