

Todays Agenda:

Derry Lynch CXO



01. Introductions:

02. Cora Assistant

03. Portals

04. Jira Connector



John Willson Cora PPM Solutions Consultant

Alistair Orr Customer Success Representative



05. Wrap Up



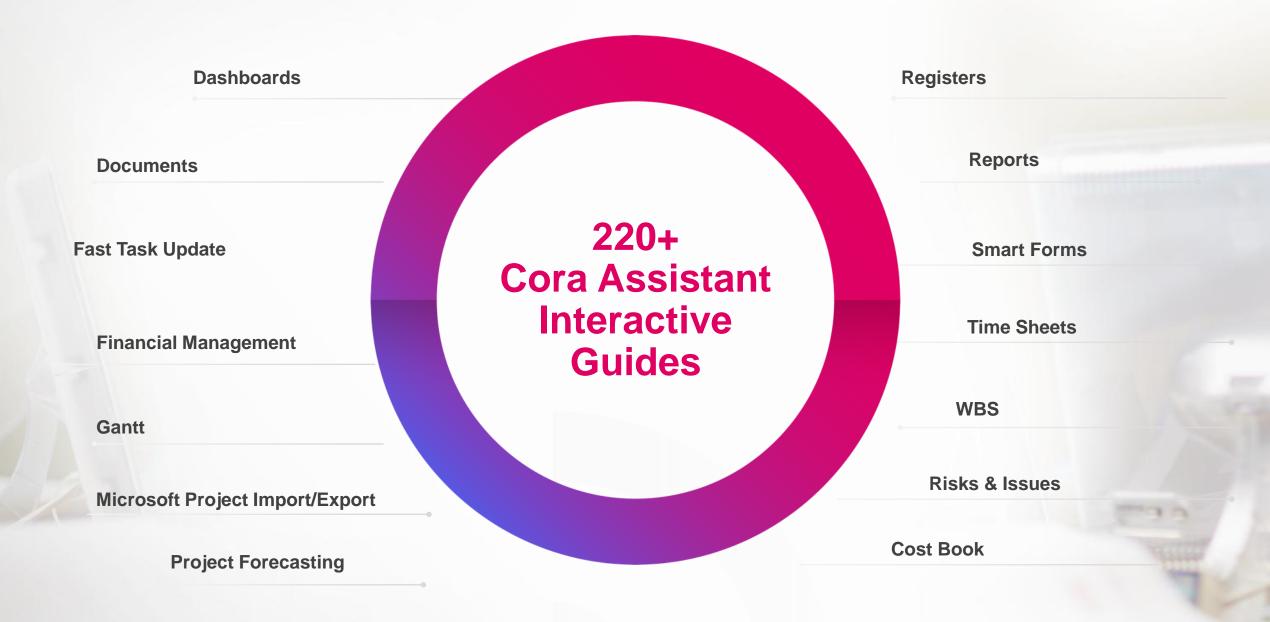
Andy Yawn
Cora PPM Solutions
Consultant



Lee Robinson
Customer Success
Representative

Cora Assistant

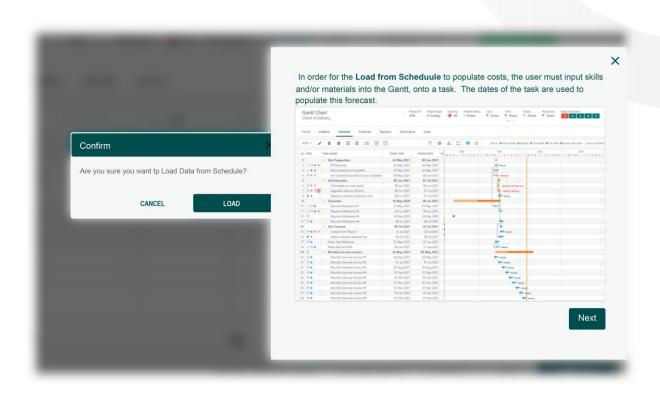
Digital Onboarding with Real Results





Reduce Onboarding Time

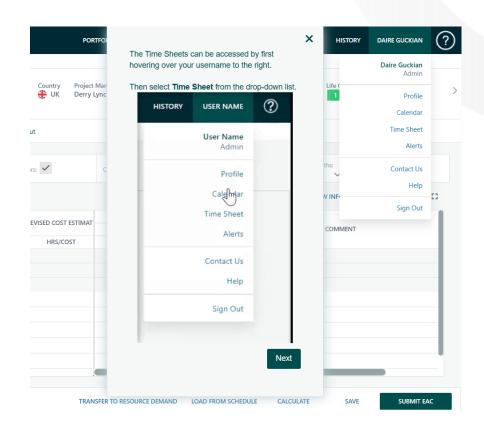
- Reduces the need for expensive instructor-led training.
- Provides digital onboarding tutorials for users.
- Ensures a consistent approach in onboarding for users.
- Proactive guidance throughout the system.
- Easy to update with new product features.





Accelerate Cora Adoption

- Drive adoption with improved user engagement
- Accelerate time to use key features
- Proactive guidance in the bestpractice
- Support process change
- Target key behaviors to improve data quality





Business Impact

Accelerate User Adoption

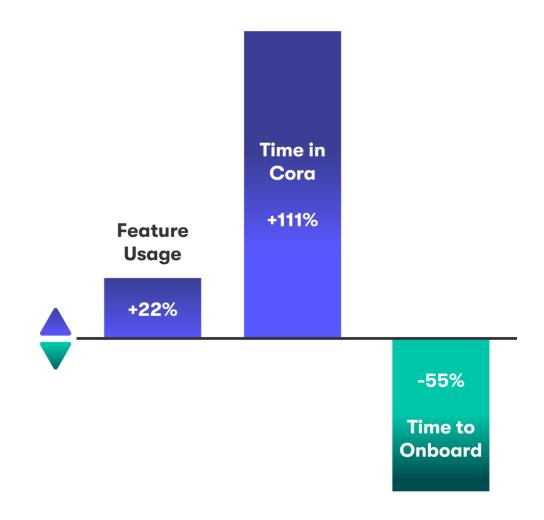
Deliver in-context, intuitive guidance that speeds up learning and boosts user confidence with minimal disruption.

Reduce Onboarding Time

Cut onboarding time by 55% with personalized, real-time guidance that helps new users get productive faster.

Scaling Best Practice

Boost usage by 111% with dynamic guides that make complex workflows intuitive and encourage continuous improvement.

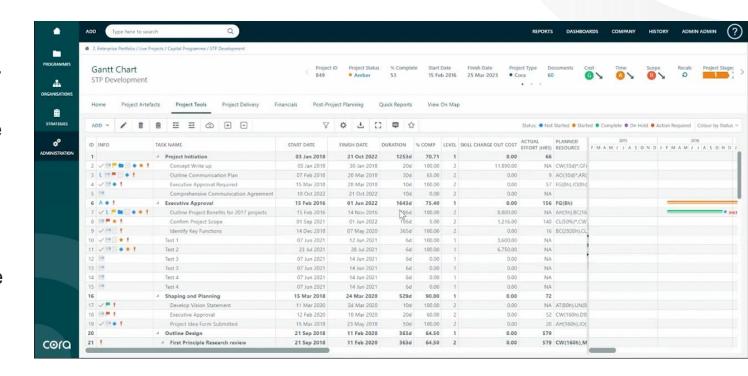


Driving Behaviour

Drive best behaviour by triggering guides and/or prompts at defined intervals, e.g. weekly, end of month, biannually, etc.

Push guides dynamically to promote best practice. For example

- First time users prompt to watch the Tour guide
- Recommendation for guides that have never been viewed
- Pop up reminders for key milestones
- Pop up prompts for pages that have not been visited and might require actions, e.g. complete Time sheet, Approve Workflow, etc.
- View Cora corner
- Display guides at key intervals
- For first time viewing of pages and features
- Showcase new features that have been released

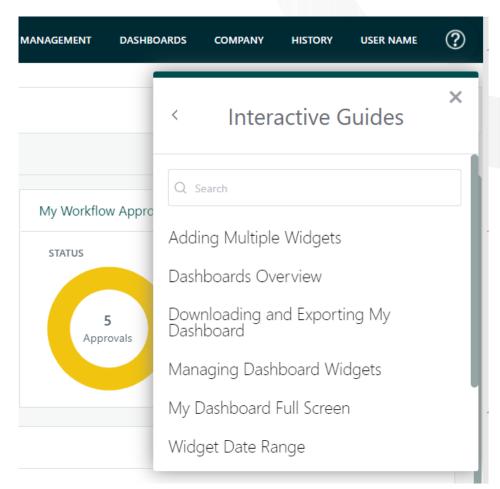




Bespoke Guides (Premium)

Bespoke guides can be added to reflect your unique configuration. This further reduces training effort and improves the quality of data. Typical examples of bespoke guides include:

- Customer Specific Navigation
- Smart Forms
- Project Registers
- Workflow Processes
- Financial Import Processes
- Portal Usage
- Business Processes





Cora Assistant- Demo

Digital Onboarding with Real Results

Cora Portal

Extend Access, Retain Full Control

Business Impact

Enhanced collaboration

Structured workflows and secure access enable seamless interaction with external stakeholders while maintaining complete project visibility for internal teams.

Streamlined sub-contractor management

Third-party updates flow directly into Cora with automatic alerts, while document review and approval processes accelerate invoice processing and improve cash flow.

Strengthened governance

Full audit trails and structured workflows replace email confusion, reducing risk and simplifying compliance audits across your extended enterprise.

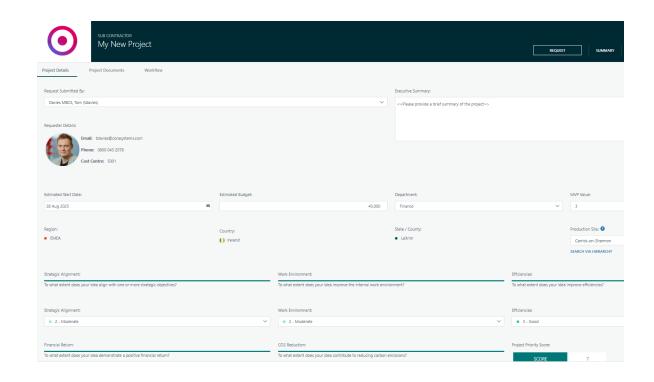
Accelerated ideation

Ideas flow automatically from capture to project creation, eliminating manual tools and data re-entry while preserving full traceability for better analysis. "Portals have added a lot of value for us, our vendors submit invoices, change notifications are tracked and the workflows connect the process."

PMO LeaderGlobal Life Sciences Organization

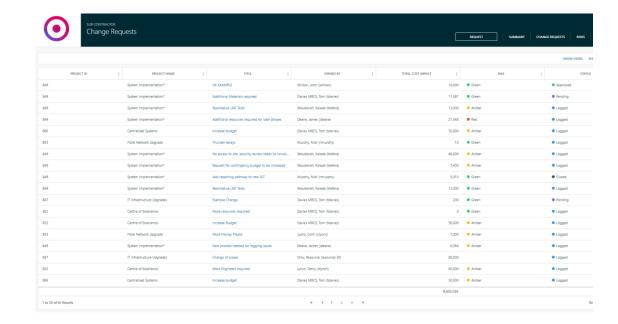
Ideation Use Case

- Use pre-built templates or create custom smart forms, with configured workflows and notifications for intake and demand management.
- Submitted information flows into portfolio dashboards, supporting prioritization of current and future projects.
- Organizations can deploy multiple idea portals, for example, by division, product line, or operational efficiency initiatives.
- All portals operate within the same Cora instance, enabling centralized review and approval when needed.



Subcontractor and Partner Use Case

- Any smart form can be used on the portal, with read-only or read/write permissions for status updates. Submitted data flows automatically to dashboards for full users.
- Users can upload documents into structured folders as defined by a Cora administrator.
- You can spin up dedicated portals for individual contractors or group access by project, program, or portfolio.
- Permission-controlled access to digitized forms (Registers) allows customers to manage specialized requirements with subcontractors or partners, e.g., Health & Safety, Environmental, or Quality compliance.



Portal Demo

Digital Onboarding with Real Results

Portal Use Cases

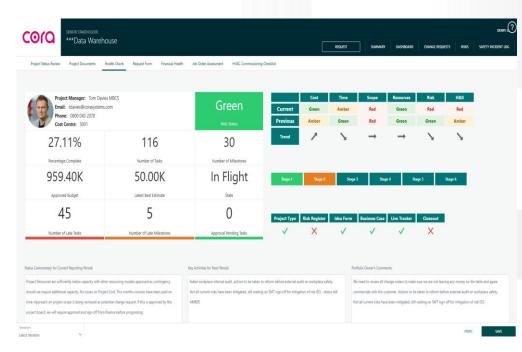
Project Ideas/Requests Portal

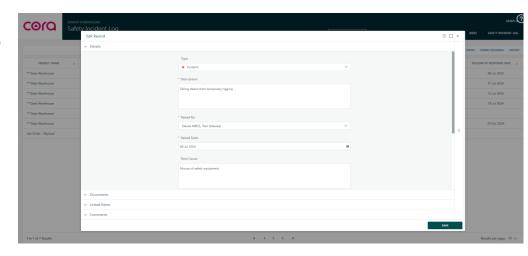
Use Case

- All staff can submit project ideas directly into Cora via the Portal, no full licence required.
- Benefit:
- Broadens engagement across the workforce
- Users can track progress of their idea, no more "black hole" submissions
- Encourages a culture of innovation and inclusion
- Talking Point:
- "It gives everyone in the organisation a voice, and visibility on outstanding project requests, as well as driving innovation with all project requests being pushed through the platforms workflow."

Direct Register AccessUse Case

- Targeted Views of RAID Logs Portal users can access filtered registers, for risks, actions, issues, decisions, etc, based on their project or role.
- O Benefit:
- Keeps sensitive or irrelevant data hidden
- Promotes ownership and visibility without system overload
- Encourages collaboration on shared risk/action logs
- Talking Point:
- "It's a smart way to promote visibility and accountability, without overwhelming users, as well as providing a way into the system without needing full site access."







External Stakeholder Access

Use Case

External Stakeholder Access (without full licences) Allow external partners, vendors, or consultants to securely view selected project data, without giving them full access to the main Cora system.

Benefit:

- Saves licence costs
- Maintains data control and security
- Avoids the need for onboarding or training external users on the full system

Talking Point

"The Portal gives us a cost-effective way to engage external stakeholders with the exact data they need, no more, no less."

Executive Reporting

Use Case

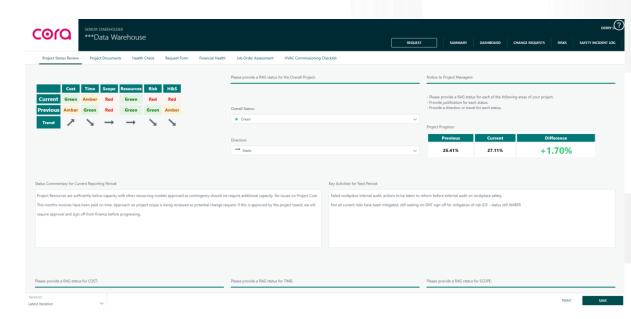
Executive Access to Pre-Set Views, executives can log in to the Portal and see a customised dashboard or view of their specific data, such as project health, high-level KPIs, or key risks

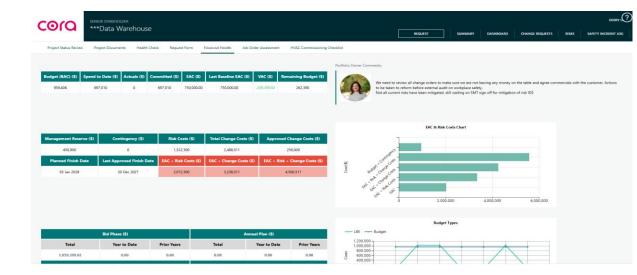
Benefit:

- No learning curve, they see what matters
- Ensures data consistency in leadership meetings
- Reduces reliance on emailed reports or PDFs

Talking Point:

"The Portal gives senior leaders one click to their world, no clutter, no confusion, just the data they care about."



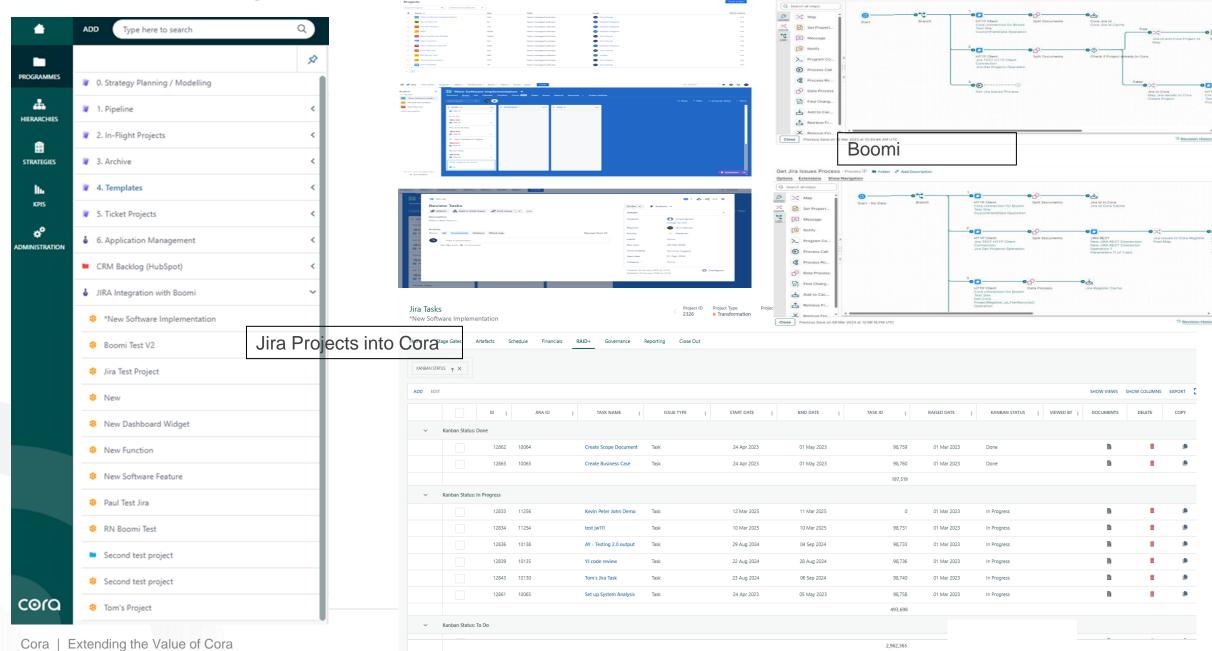




JIRA Connector

Extend Access, Retain Full Control

JIRA Connector Building Blocks



Jira Create Project in Cora Process - Process ① 🐞 Folder 🤌 Add Description

Jira Integration

Туре	Description
One-way	Customer data is loaded from Jira into Cora PPM - typically, into the Gantt as Tasks, Project Registers and Custom Fields.
	For example, Task data is imported into Cora to update a Project's Gantt chart. Data can be updated on subsequent loads of the data.
Two-way	As above but Cora data is also loaded uploaded into Jira.
Complex	Data is synchronised across the two systems - updates in Jira are reflected in Cora, and vice versa; business rules and workflows are respected in each system.



Jira: Integration Use Case

Use Case 1:

Integrate the Jira development programme of work into Cora in order that progress on development work can be monitored alongside overall project progress. This will mean:

- Project managers are provided with visibility of Jira development work within their Cora projects.
- Gantt Timeline accuracy is significantly improved with hourly updates from Jira.
- Jira development work displayed as Gantt Tasks with associated Dates, % Complete and Status (In Progress, Accepted, At Test etc.).
- Tasks are imported (if they do not exist) and updated.
- Executive reporting is provided across the programme.

Use Case 2:

Include development resource names and goals in the integration to Cora. This will mean:

- Development resources are automatically assigned to Cora tasks, enabling them to timesheet directly in Cora.
- The project resources can be managed alongside the development resources in one place.
- Important Jira development goals are displayed as Milestones.
- Executive reporting is provided with the rolled-up data.

Notes

- Overarching requirement is to provide a picture of current resource capacity and strategy capacity planning.
- Integration is one way



JIRA Connector Demo

Seamless Integration



Powering Innovation Through Connection

Location: Aviva Stadium, Dublin, Ireland

Date: 17th – 18th of September

Visit corasystems.com/connect-2025 to register.

Q&A