



# RIIO-T3

## Investment Planner

A digital solution that transforms manual task management by centralizing plans and proposals, enabling users to analyze, compare, and choose the best options efficiently.

# Problem Statement

The task of manually maintaining, updating, and examining the spreadsheets was challenging for National Grid users, and this process was designed to provide a digital product. Since the manual method has taken more time and most times it was tough to accomplish on time.

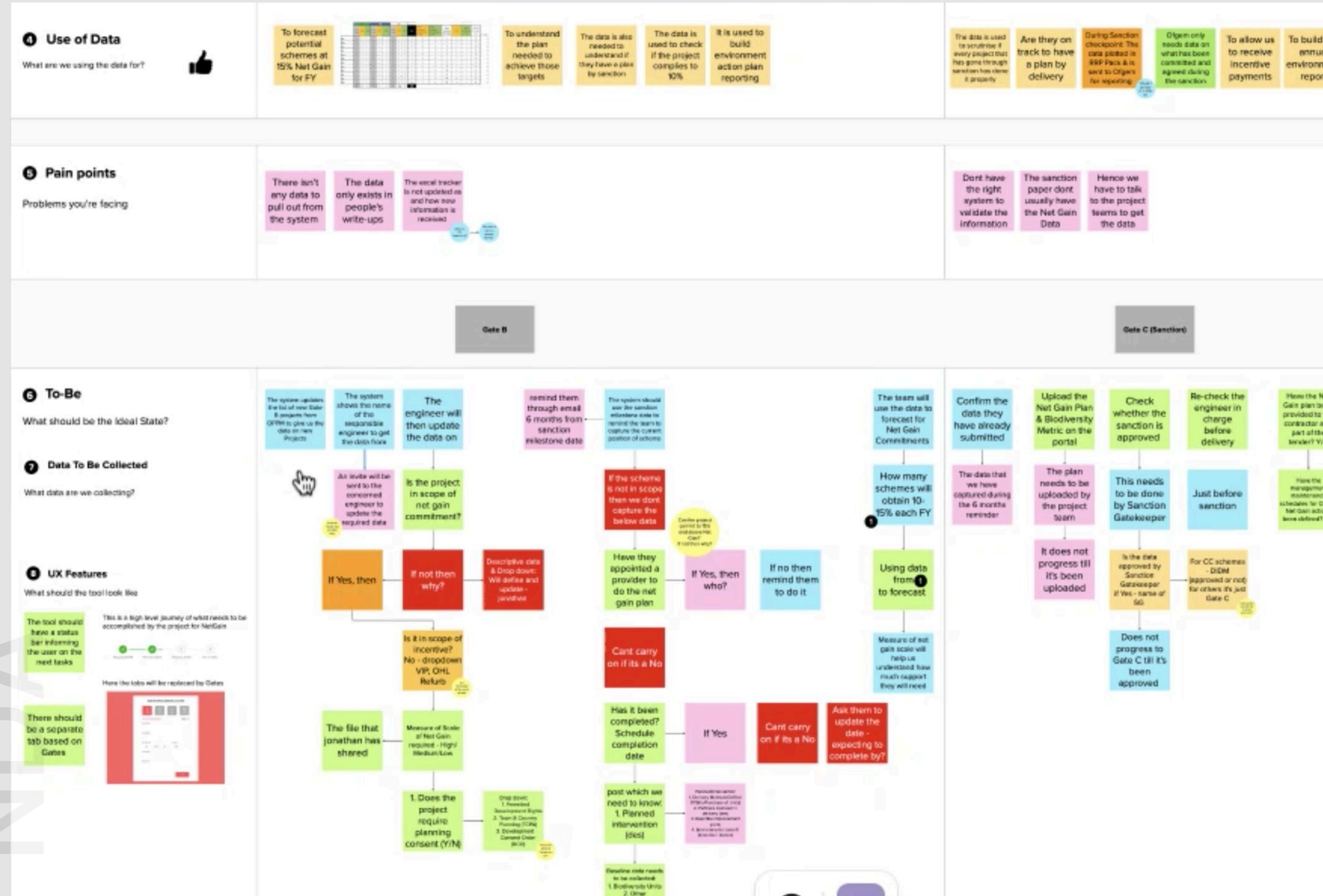
# Goal

National Grid needed a better way to **manage** asset health and plan investments. They wanted a digital tool to help teams **build, compare, and prioritize plans** using real data—making planning faster, clearer, and more accurate. Users can view and understand the **health of assets**, helping them make informed **decisions** for the network while creating and managing portfolios. Asset Intelligence (AI) is a module within Electricity Transmission (ET).

- **Role:** UX/UI Designer
  - **Responsibilities:** Research, Wireframe, Prototyping, Usability Testing, Collaboration
  - **Team:** 1 UX/UI Designer, 8 Developers, 1 Project Manager
  - **Tools:** Mural, Figma
  - **Project Duration:** 6 Months

# User Interviews

From our discussions with key stakeholders, project managers, and journey owners, we uncovered valuable insights into their workflow challenges.



We conducted a **collaborative Mural board session** with all users to **identify key challenges in the current workflow**. The session revealed major pain points, including lack of asset health monitoring, inefficient network decision-making, and fragmented teams and processes. Users also highlighted difficulties in managing network portfolios, limited planning capabilities, and poor data sharing. Overall, the process underscored a reactive rather than proactive approach to asset and network management.

## Insights from Research

1. Lack of Asset Health Monitoring
2. Inefficient Network Decision-Making
3. Portfolio Management Difficulties
4. Limited Intervention Planning
5. Fragmented Teams and Processes
6. Inadequate Data Sharing and Collaboration
7. Reactive Approach to Asset Management

## User Needs

- They emphasized the **need** for a comprehensive overview of planned estimates and detailed analysis segmented by site or circuit, which is crucial for crafting the most effective plans.
- Their **idea** centers around creating a unified platform that consolidates all planning and proposal data, allowing seamless management and enabling side-by-side comparisons of different proposals. This capability would empower them to make well-informed decisions about which proposals to advance.
- Ultimately, this digital transformation **aims** to replace the existing manual process, significantly enhancing users' ability to manage daily tasks with greater accuracy and efficiency.

# Hi-Fi Designs

This collage of screenshots illustrates the user interface design for the RIO-T3 Investment Planner application, showcasing various features and components across multiple screens.

**Top Row:**

- Sign In Screen:** A dark-themed sign-in page for the RIO-T3 Investment Planner. It features a logo, input fields for email and password, and a "Sign In" button. Below the form is a "Don't have an account? Request here" link and a "INVESTMENT PLANNER RELEASE 2.0" note.
- Home Screen:** The main navigation menu for the RIO-T3 Investment Planner. It includes links for Home, Investment Plan, Site Data Map, ET Drivers, Dashboard, Draft Proposals, Removed Investments, Supporting Information, and a Sign In button. A central graphic illustrates the investment planning process.
- Investment Plan Overview:** A table view of the "Investment Plan" section showing 9498 results. The columns include Investment Ref, Title, Status, OPPM No., Delivery Vehicle, ET/SI, and TO Lead Scheme Reference. A search bar and filter options are at the top.
- Investment Plan Overview (Second View):** Another view of the "Investment Plan" section showing 9498 results. The layout is identical to the first view, displaying a table of data and a search/filter bar.

**Middle Row:**

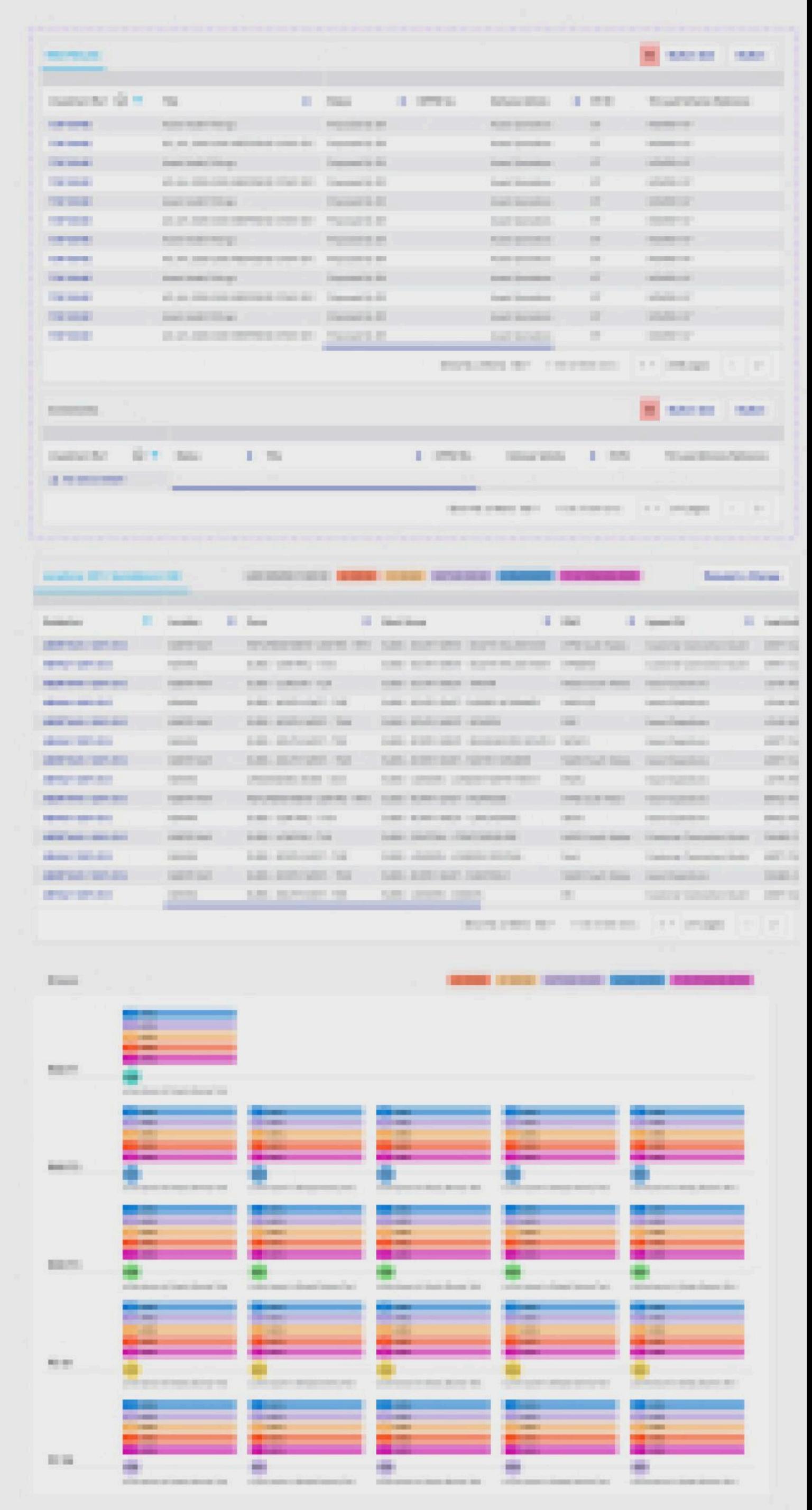
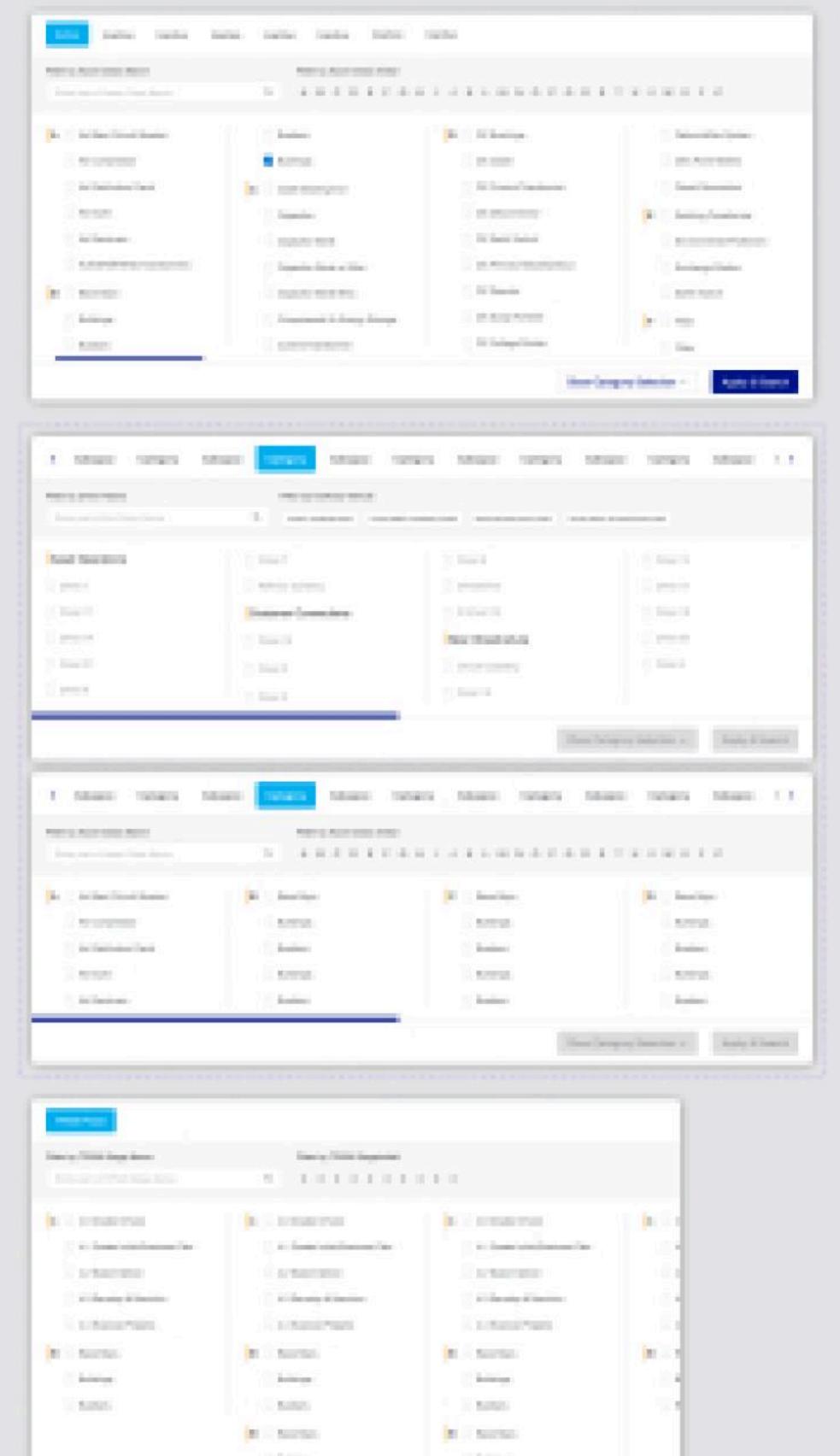
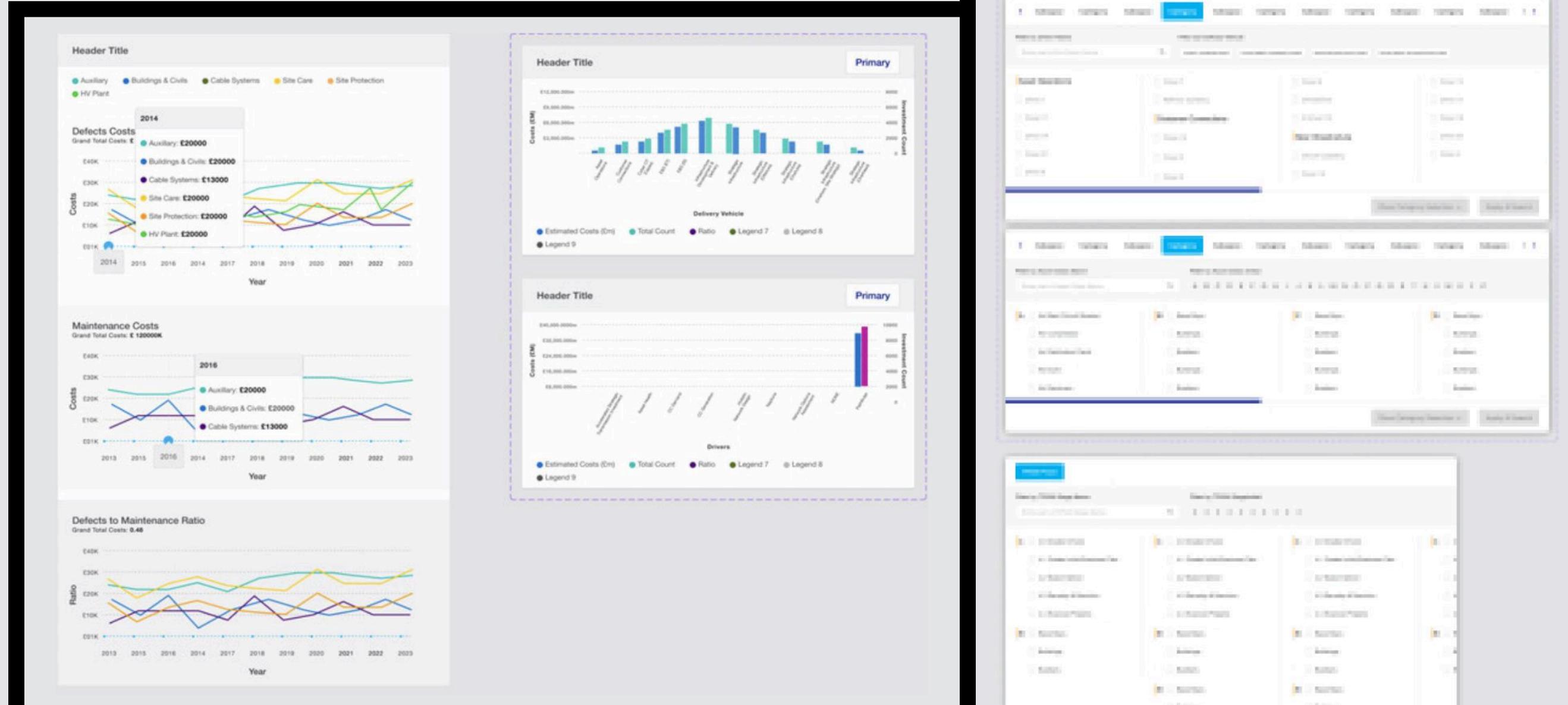
- T3IP-00001 Proposal Overview:** A detailed view of a specific proposal. It includes sections for Overview (with data like Title: ERW4: New 400kV substation), Source Information (Network Investment Plan Totex 1 20123 FINAL.xlsx), Investment Scope (with a map of Europe showing various substations), and Linked OPPM Investments (listing Driver 12).
- Map View (Europe):** A map of Europe with numerous substations marked by green and yellow dots. A red diagonal watermark across the map reads: "This is just a visual display screen, and the data may turn out invalid."
- Map View (UK/Netherlands):** A zoomed-in map of the UK and Netherlands area, specifically focusing on the Fourstones 33kV S/S (FOUR) and Fourstones 275kV S/S (FOUR). A red diagonal watermark across the map reads: "This is just a visual display screen, and the data may turn out invalid."
- DUNGENESS 400KV S/S [DUNG4] Substation Overview:** A detailed view of the Dungeness 400KV substation. It includes sections for Overview (Substation: DUNGENESS 400KV S/S, Work Group: SUBS - SOUTH WEST, Lead Individual: MATT CUMMING), Site Strategy (with a map showing location details), and Drivers (a timeline from 2021 to 2034).

**Bottom Row:**

- ABERTHAW 132KV S/S Substation Overview:** A detailed view of the Abertaw 132KV substation. It includes sections for Overview (Substation: ABERTHAW 132KV S/S, Location: ABERTHAW, Zone: SUBS - SOUTH WEST, Work Group: SUBS - SOUTH WEST), Site Strategy Supporting Documents (with a map), and Drivers (a timeline from 2021 to 2034).
- Site Strategies Overview:** A table view of "Site Strategies" showing 357 locations and 638 substations. The table includes columns for Substation, Location, Zone, Work Group, Lead Individual, Recommended outcome, and Baseline Interventions. A "Request a Change" button is present at the top right.
- Investments In Plan Overview:** Two bar charts showing Investments by Delivery Vehicle and Investments by Drivers. The "Investments by Delivery Vehicle" chart shows costs from £10,000,000 to £100,000,000 across various delivery vehicles. The "Investments by Drivers" chart shows total counts for different drivers.

A large red diagonal watermark across the bottom row of screenshots reads: "This is just a visual display screen, and the data's are getting change often".

# Design Systems



## Logo Options



SELECTED

## Final Screen

- Stakeholder Demos: Internal and external presentations
- Specs & Assets: Delivered to developer

**Note:** The working file was developed within the client's secure environment. As a result, prototype links are no longer accessible outside that environment.