

Report Request Checklist:

Organisation Name:	Urban Regeneration Group		
Requester:	Sarah Smith	Date:	1 st Jan 2022

Please ensure data shown in the mock up has been added to your Test site – we will need at least 2 projects to test against. We will try and match the mock up format as closely as possible.

1. Report Name	Portfolio Dashboard
2. Report Orientation (Reports can only be 1 orientation; Landscape OR Portrait)	Landscape
3. Preferred Export Format Type? E.g. Word, Excel, PDF (although reports can be exported from Verto in several different formats, knowing your preferred export type for the report will ensure any margin/column sizes are formatted appropriately. Please note, due to the way Microsoft renders SSRS reports, not all formatting can be exported from the system, such as inserted graphics and tables)	Preferred format for printing is PDF
4. What filters do you need? (filters determine what data is or isn't included in the report when it is generated. Filters can be single selection or multiple selection. They can also have an 'ignore' option allowing the report to be generated multiple times for difference audiences. When you have multiple filters, they can be progressive or non-progressive. Progressive filters will only show results based on the previous filter selection. It is also possible to have a default set of filters on the report, e.g. the current month for a Financial Report.	<ol style="list-style-type: none"> Filter using hierarchy to identify what is pulling into the report. (Single Select) Filter to isolate projects within specific stages e.g. only projects in Delivery under the initially selected hierarchy group. (Multi Select) Filter to select the different sections to be shown in the dashboard report e.g. only the Risk section.
5. Do you want to restrict/exclude by default what's included in the report? (e.g. when the report is run only ever show Key Items =Yes, or RAG Status = RED or don't include the "Closed" or "Archive" projects etc). Please specify any default restrictions/exclusions you need for this report.	<p>Exclude by default the following:</p> <ol style="list-style-type: none"> Any projects in the Archive stage Any archived risks/issues/tasks/milestones Any completed risks/issues/tasks/milestones using the RAG status field to determine completed. Any non-key items. Only key risks/issues/tasks/milestones to be included in the report.

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<p>6. How should the data be grouped? (data in the report can be grouped into easy to view sections e.g. you may want your report to show all projects across Verto but grouped based on the stage they are in. Sub-groupings can then be added e.g. Red projects within the Live stage. Groups will be hardcoded into the report and unlike filters, cannot be changed at time of generating the report)</p>	<p>Projects to be grouped under their parent programme as shown in mock up.</p>
<p>7. How should the data be sorted? (projects are usually sorted (listed) based on project code sequence; however, these can be sorted based on other requirements e.g. on a risk report have the projects sorted based on those with the highest risk score first. As with grouping, the sort sequence will be hardcoded into the report and cannot be changed at time of generating the report)</p>	<p>Projects to be ordered based on sequential project ID underneath each programme group</p> <p>Risks/Issues/Tasks/Milestones to be sorted based on the RAG status e.g. all Red items first, then Amber, then Green.</p>
<p>8. Do you require repeating report headings? (when the report is exported should the column headers appear on every page of the report or just the first)</p>	<p>Yes, report title and logo should appear on every page and where applicable, if tables flow onto multiple pages, the table header should repeat.</p>
<p>9. For financial reporting, should figures be shown as YTD or Financial Year? (please provide any further information which may be of use to the report writers)</p>	<p>Report to show all financials regardless of financial years.</p>
<p>10. For financial reporting, are totals and sub totals required (if applicable)</p>	<p>Yes, report to total and sub-total financials under project and programmes as shown in mock up.</p>
<p>11. Do you require your organisational logo on the report? (note, if you require a different logo from your site logo, please provide a JPEG file along with the report mock-up)</p>	<p>Yes – standard site logo please</p>
<p>12. Do you require a front page? (Please Note: if the front page is to be a full-page graphic, it's not then possible to do repeating headers/footers on the following pages. Or, you require the front page to be one full block of colour then, the headers/footers on following pages must be the same colour. This is due to how SSRS reports work).</p>	<p>No.</p>
<p>13. Do you require any images to be inserted into the report? (images must be uploaded into the file area using an agreed, consistent naming. Then when the report is generated, it will look for the names/images in the file area, and if located, will pull them into the specified field in the report. The row/cell will be blank in the report if there is no image in the files or if it is named incorrectly. Any naming convention can be used but it must be consistent).</p>	<p>No - N/A.</p>

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14. Colours (please supply the hex or RGB code of the colours required. You can Google “Colour Picker” and the code will look something like “#e00f2b)	Blue - #4682B4
15. Fonts (if you require a corporate font, please let us know)	Verto standard is fine
16. Has relevant data been added to the Test Site? (to successfully test your report when building it the report writers require access to example data. Without data it is very hard to test a report before giving it to the client. If possible, please provide Project Names/Codes for report writers to test against.)	Yes. Urban Programme has been added to Test Site which has multiple projects with complete data to test.

Please send this completed checklist, along with your mock-up to reports@vertocloud.co.uk. This information will be used to review your request and provide a time and cost quotation for the work.