

## New Report Request Checklist:

Organisation Name:	Urban Regeneration Group		
Requester:	Sarah Smith	Date:	May 2023

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	Stakeholder Highlight Report
2. Report Orientation (Reports can only be 1 orientation; Landscape OR Portrait)	Portrait
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)	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 <b>progressive</b> or <b>non-progressive</b> . 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.	N/A
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.	Hardcoded filters: Only include key records – milestones, risks & issues Only include milestones, not tasks Exclude completed or archived records
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	Not required.

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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)	
<b>7. How should the data be sorted?</b> (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)	Milestones in end date, ascending order. Risks in RAG status order, Reds at the top. Issues in Target Resolution Date order.
<b>8. For financial reporting, should figures be shown as YTD or Financial Year?</b> (please provide any further information which may be of use to the report writers)	Not required.
<b>9. For financial reporting, are totals and sub totals required?</b> (if applicable)	Not required.
<b>10. Do you require repeating report headings?</b> (when the report is exported should the column headers appear on every page of the report or just the first)	If the report falls onto more than one page, please repeat the heading of the impacted table(s).
<b>11. Do you require a front page?</b> (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).	Not required.
<b>12. Do you require any images to be inserted into the report?</b> (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).	Not required.
<b>13. Do you require your organisational logo on the report?</b> (note, if you require a different logo from your site logo, please provide a JPEG file along with the report mock-up)	Yes please – stakeholder specific logo attached to request.
<b>14. Colours</b> (please supply the hex or RGB code of the colours required. You can Google “Colour Picker” and the code will look something like “#e00f2b)	#23394e to be used for the dark blue, #6ab4fb to be used for the light blue.
<b>15. Fonts</b> (if you require a corporate font, please let us know)	Standard Verto font is fine.

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**16. Has relevant example 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, please use PR000258 which has data and several approved governance reports.

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