



The leading provider of P3M solutions for the
Public Sector

Verto Pro Service Definition G-Cloud 15

Verto Features

Verto is the #1 Provider of Portfolio, Programme and Project Solutions for the UK Public Sector

Verto is the solution that centralises your information, simplifies your workflows and supports your path to successful programme delivery. The tools within Verto help to organise everything from simple day-to-day tasks to major projects and programmes right across the organisation.

If you're confused about how to find a solution to the challenges you face, read on to learn how Verto consolidates your project data, activities, team management and more, to provide you with simple processes that handle everything across all your project and programme work.

Verto can be setup by our expert team. Support, including guidance and training, is available to help maintain use so you can work collaboratively with your teams across the business and with other organisations in a secure manner.

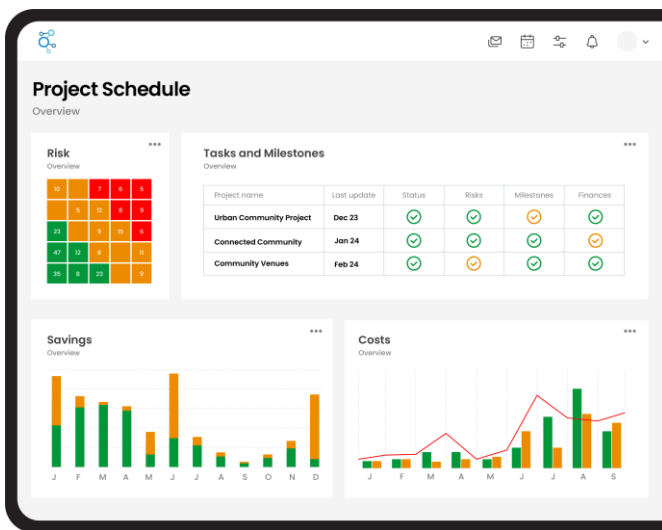
Key features:

- Ready to go Portfolio, Programme and Project (P3M) solution
- Aligned to best practice Public Sector standards
- Cloud based, accessible everywhere
- Microsoft Teams and Office 365 integration
- Fully configurable dashboards
- Full RAID capabilities to monitor your project as it progresses
- Resource management designed with people in mind
- Track all costs and benefits as they happen
- Understand lessons from previous projects to continually improve
- Kanban Board, Gantt and task management functionality
- Alerts and notifications.

Verto Pro

Verto Pro is an out-of-the-box, public sector standards compliant, PPM platform. No need for configuration or customisation. Self-serve onboarding with e-learning and standard support through dedicated Client Portal. Verto Pro provides access to the full feature set of the core P3M platform.

Verto Pro includes	
Core System Functionality	Services
• Portfolio, Programme & Project Management • Multi-Stage Set up With Approval Functionality • Full RAID Capture & Tracking • Comprehensive Planning Capability – including Gantt & Kanban • Resource Management • Performance Indicators • Financial Tracking of Costs, Benefits • Action Tracking • Lessons Learned • User-Configurable Dashboards • Verto Intelligence Assisted Import • Verto Intelligence Partners • Reporting Suite • OData Access • Integration with MS365	• Hosting Costs • Maintenance Support • Helpdesk Support • Online System Training • Knowledge Hub Access • Client Success Portal Access • Verto User Group Membership



Platform Features

Dashboard Monitoring

Verto's dashboards provide a real-time, aggregated view of all project and programme information, focusing on what matters most to you, be it milestones, risks, costs or anything you're recording in the system. Create and save as many dashboards as you wish and share them with colleagues and stakeholders quickly and simply. Dashboards are interactive at every level and can be fully customised using a huge number of widgets, which can be tailored into several formats (bar charts, line graphs, containers, data tables etc.) to suit your preferences. Filter dashboards on any field, providing full control over the management information you need to focus on at any time.

Planning/Gantt

Project plans and schedules can be created simply and managed easily within the system using Verto's planning feature. Multiple views are available for you to customise how you view and update your plans. Our Gantt capability is embedded within the planning module and provides a visual assessment of project plans. The Gantt view is interactive, allowing elements of the planning module to be amended in this format. An 'offset dates' feature can be used when an entire plan needs to be pushed back or brought forward as required. You can import Microsoft Project Plans into Verto, so you can use your preferred tool whilst supporting your team's collaboration.

Reporting

Verto boasts powerful reporting functionality at multiple levels that allows for reports to be automated based on any, and all, information within the system. All reports can be exported in multiple formats including Word, Excel, PowerPoint, PDF, CSV, TIFF etc. All our reports are run in real-time, ensuring that only the latest information is presented. Take advantage of our subscription service so that your stakeholders receive regular reports straight to their inbox, eliminating the need for them to access the system to run a report. Filters can

help you ‘slice and dice’ the data as much as required, to further enhance the reporting capabilities. You can access your live data in real-time using reporting tools such as PowerBI, Tableau and QlikView.

Risk Management

Configurable and comprehensive Risk and Issue Management functionality can be held against the Portfolio, Programme or Project and aggregated to any level. Owners are assigned to individual risks and issues, along with proximity dates and mitigating actions (amongst many other field options).

All Risks



10		7	6	5	13		8		5
	5	12	8	9	9		17	4	9
23		9	15	6	54	2	16		6
47	12	8		11		3	1	15	11
35	8	23		9		17		42	9

Dependency Management

‘VertoSense’ is a feature that allows for dependencies to be identified against any two objects in the system. Comprehensive dependency networks can be produced from those connections made, such as identifying a dependency that a risk may have on an associated milestone. These can be selected within the system, which then brings up the fields linked with that dependency. The fields can be amended and updated without having to enter that section, if you, or another user has the correct permissions.

Resource Management

Our resourcing functionality has been designed to enable you to add the people required for the specific roles on your projects, showing when you need them, how much time is necessary and the associated costs. You’ll be able to ensure you have the right availability ahead of time to plan your delivery.

Performance Management

With Verto performance management you can measure and report on project performance year on year, as far in advance as is needed. Build custom metrics into your projects, track your actual results against your targets using your own reporting frequency.

Verto Intelligence

Verto Intelligence brings AI-powered insight to your portfolio, helping you forecast risks, optimise resources and make confident, evidence-based decisions. See patterns, predict outcomes and act faster, all within the secure Verto platform trusted by 100+ public sector organisations.

- **Verto Intelligence Help** – Based on Verto’s extensive knowledge base, this AI assistant answers questions and provides you with step-by-step instructions on how to, for example, add a risk.
- **Verto Intelligence Data Insights** – Make faster, smarter decisions with Verto’s new AI-powered Data Insights tool. Instantly analyse live project and programme information, uncover trends and surface key risks, enabling clear, confident decision making across your organisation.
- **Verto Intelligence Partners (VIPs)** – We developed AI agents, called VIPs, who have been designed to be experts in finance, risk, project admin and IT. VIPs give you access to a core team of agents who will advise you on the project, where it is, what needs to happen next, and helps you action various steps within the

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platform. Accessing this team of experts provides excellent training opportunities for new or ‘accidental’ project managers and helps reduce your time spent on administrative tasks. The partner's advice also helps point you in the right direction for the next most important action to take.

Benefit Realisation and Cost Management

Verto records quantitative and qualitative benefits, which are then tracked and reported against at multiple levels via the dashboard, as well as utilising our comprehensive reporting functions. Verto provides full finance management capabilities, allowing you to track cost profiles over time, providing full transparency on project spend.

Integrations

Verto can be used fully embedded within Microsoft 365, Teams and Outlook. This allows users to manage projects, end to end, without the need to leave their Office 365 suite of tools or log into another system. The synchronised calendar allows for items such as project tasks, milestones, risks, and issues to be overlayed within the same diary of events and meetings in your own calendar view. Synchronised document storage allows you to continue managing your documents within SharePoint via Verto. Multiple Kanban boards and dashboards can be added to each project directly within the Microsoft tools, extending collaboration opportunities and providing management information at your fingertips.

Notifications

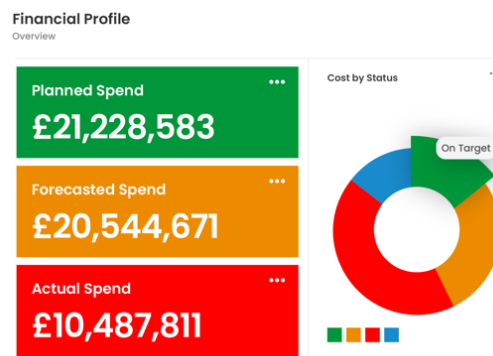
User-defined automated risk alerts and notifications appropriate to the level of involvement, including approvals, missed dates and other tasks and milestones can be set up, within the Verto Teams App via your Teams channel. You are notified of any changes or updates to any field within the system, including risks, and this is applied to every field within a risk, so nominated users are always notified immediately after relevant changes are made. Common notifications are, but aren't limited to, a change to the ‘proximity date’ or ‘current risk rating’ of a risk.

Storage

Unlimited, cloud-based storage is available for each entity (e.g. project, programme, portfolio) to manage documents, and each document store is independently secured, so that only users with the appropriate permissions have access to it. External links such as a SharePoint archive can be inserted, however Verto also integrates directly with SharePoint, so you can continue using the current storage solution you are familiar with.

Performance Management

The Verto performance management module can be utilised to measure and report on project performance. Pre-set thresholds can be assigned to a KPI to see if you're achieving the objectives set. Both projects and non-project activities can be assigned to a KPI to support performance analysis against projects. Performance

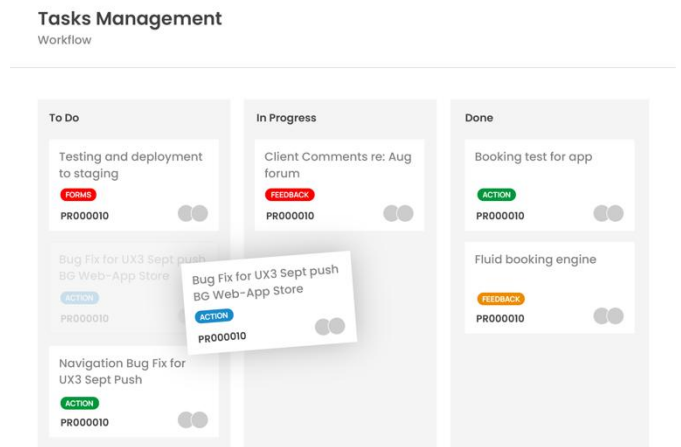


groups/objectives can easily be created to ease the management of multiple KPIs that form part of the same objective and compare performance against other organisations or services is also available to track your progress against others.

A performance management report is part of our standard suite of reports however custom reports/plans/graphs can be produced and tailored to suit your organisation's needs. Within the system, a quartile graph is included for each KPI and custom charts/graphs can be produced if required.

Kanban Boards

Our Kanban board functionality allows you to create personal or shared boards. Create lists according to the progress of work containing cards (or tasks), so you can keep on top of each piece of work within a particular project and move them across the lists as you complete them. Cards hold information such as statuses, due dates, members, custom tags, additional documents and much more. A variety of templates can help you get started, but you can create your own as required. Every board can be filtered to find specific data. For example, you can easily filter a board to only show cards you are a member of, or with a status of red, that is also due in the next 7 days etc. All board data can be aggregated and summarised within our dynamic dashboard, providing even more opportunities to filter and group cards across multiple boards at once.



Feeds

Feeds provides functionality that pulls all tasks, risks, and other information related just to you into one view from the entire Verto site within your organisation. From one click of a button, you can get a true view of your task-load immediately

Audit Trail

The audit log is automated against every field in the system. Every change you make is recorded and is easily viewable. Changes to fields are also supported by a 'track changes' feature so you can easily see what's changed between versions.

Credentials

Our preferred method of authenticating credentials is using Single Sign-On where we delegate the authentication process to the customer's Active Directory. Where this is not possible users can provide username/password with 2 factor authentication.

Security/Access

Administrators have full control of tailoring each user's access and involvements within the system. Roles can be assigned to users to ensure they have access to the correct system elements. Restrictions can be placed throughout the system so users will only ever see what is relevant to them. For example, administrators can choose to restrict a user's access from a particular stage, or to the reports section of the system if required. Verto can be accessed using browsers on mobile devices.

Verto Services

Verto Pro is an out-of-the-box solution and needs limited support and services. There is no need for extensive configuration or customisation. We offer self-service onboarding with e-learning and UK-based, human support through our dedicated Client Portal. As a Verto client, you will also have access to the Verto User Group, Spotlight Sessions and other group activities.