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Verto Overview

Focus, collaborate, deliver with confidence

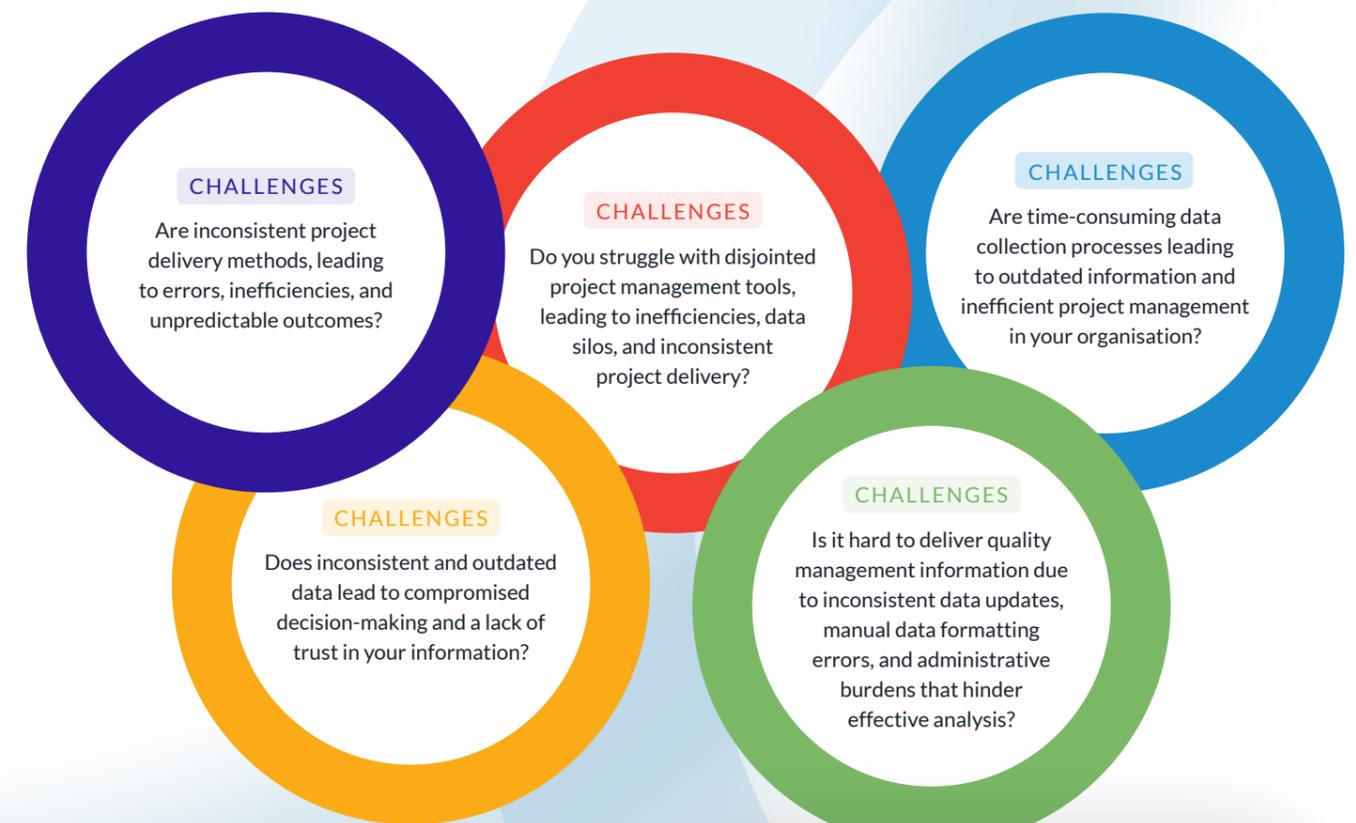


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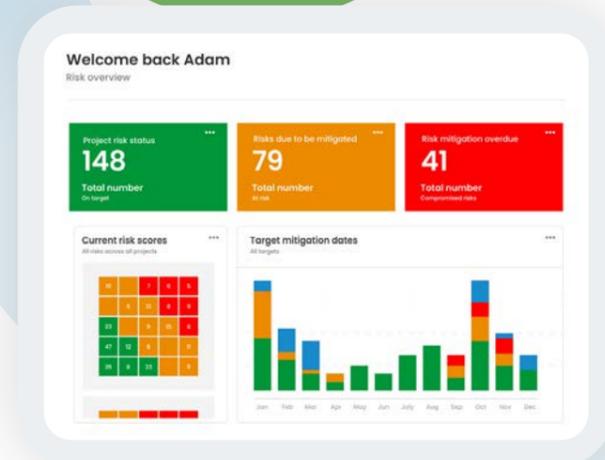
Verto supports programme management for public sector organisations

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.



Verto Customers

We're proud to support organisations with their project, programme, and portfolio management needs and achieve success, and we can do the same for you. Get in touch to find out how Verto could support your organisation.



Key features...

- ✔ Cloud based, accessible everywhere
- ✔ Microsoft Teams and Office 365 integration
- ✔ Fully configurable dashboards and reports
- ✔ Project planning frameworks that adapt to your project's evolving needs
- ✔ 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
- ✔ Structure programme management and align to your strategic goals
- ✔ Kanban Board and task management functionality
- ✔ Alerts and notifications
- ✔ Compatible with finance and HR systems



Dashboard Monitoring

Verto's dashboards provide a real-time, aggregated view of all project & 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.

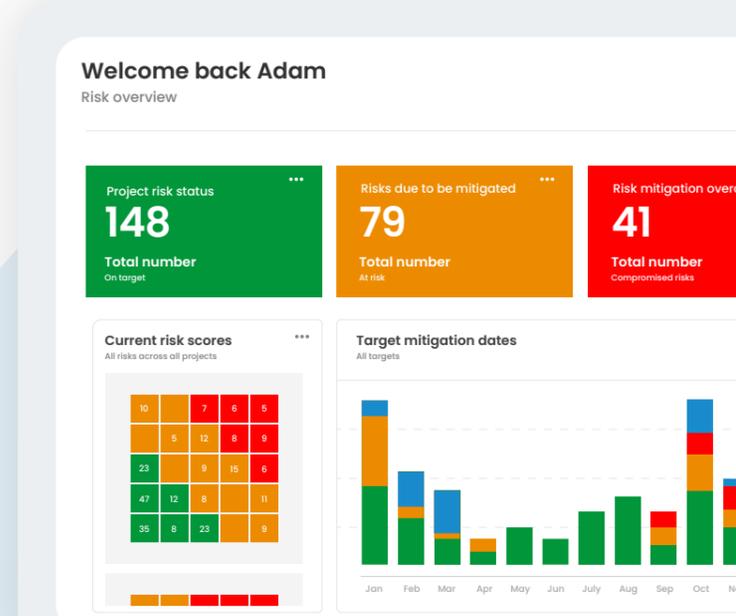
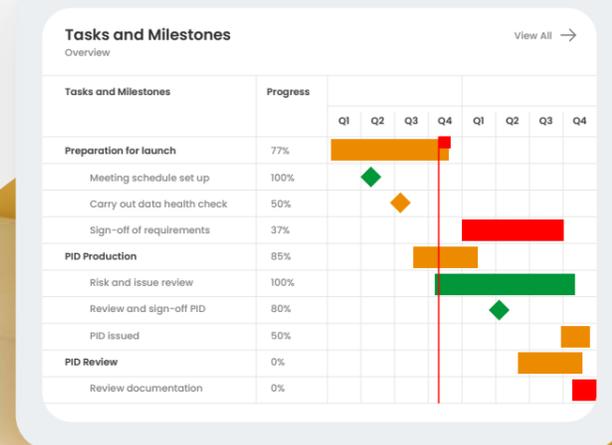
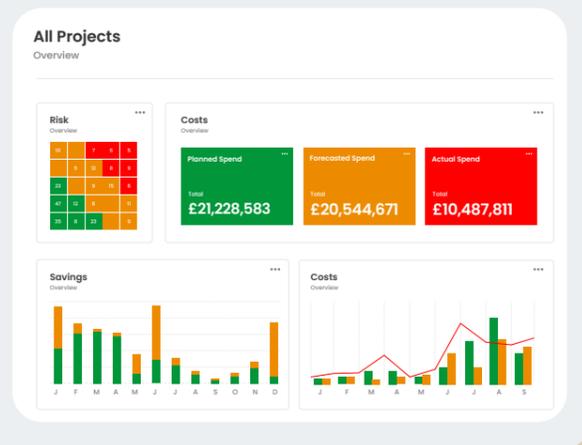
Our Gantt capability is embedded within the planning module and provides a visual assessment of project plans. The Gantt view is interactive, allowing elements of the planning module to be amended in this format. An 'offset dates' feature can be used when an entire plan needs to be pushed back or brought 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, PDF, CSV, TIFF etc. All our reports are run in real-time, ensuring that only the latest information is presented.

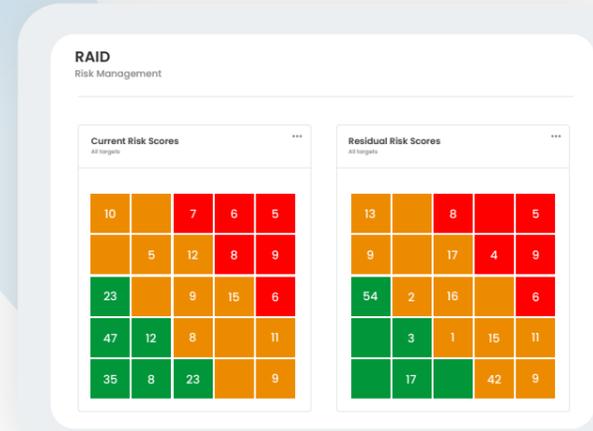
Take advantage of our subscription service so that your stakeholders receive regular reports straight to their inbox, eliminating the need for them to access the system to run a report.

We use tags and filters to 'slice and dice' the data as much as required, to further enhance the reporting capabilities. We also produce specific data extracts for reporting tools such as PowerBI, Tableau and QlikView.



Risk Management

Configurable and comprehensive Risk and Issue Management functionality can be held against both the Programme, Project or Workspace and aggregated up to Programme and Portfolio level. Owners are assigned to individual risks and issues, along with proximity dates and mitigating actions (amongst many other field options). The fields contained both within these functions and others throughout the system can be tailored to match your organisation's terminology and support existing governance.





Dependency Management

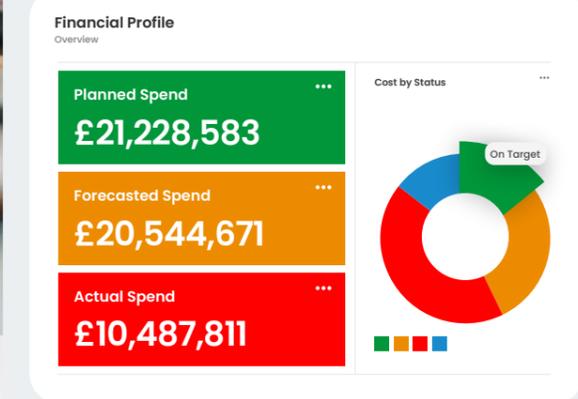
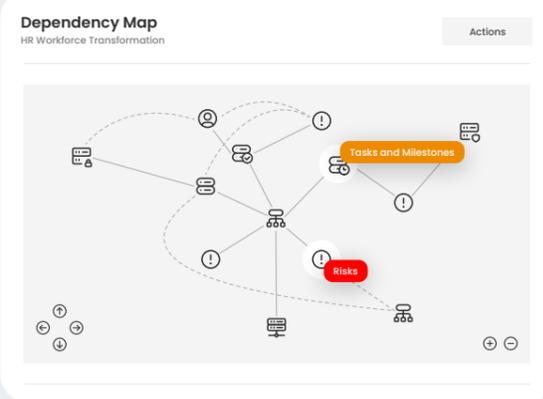
'VertoSense' is a feature that allows for dependencies to be identified against any two objects in the system. Comprehensive dependency networks can be produced from those connections made, such as identifying a dependency that a risk may have on an associated milestone. These can be selected within 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 comprehensive resourcing functionality has been designed to ensure you can find the right people for your projects based on availability, skill set and any other criteria you want to use.

Verto gives you the ability to search across all resources to see who's available, who's been allocated to which project(s) and when they may be overallocated. Search using any criteria you need, be it job title, team, project role, location, specific skill etc. Verto supports your own views/groupings of the resource pool. You can plan as far ahead as you need to avoid clashes.

The main resourcing page gives you an 'at a glance' view of a person's allocations across an entire year, making it easy to identify issues and resolve them ahead of time. Review each person individually to ensure you have the right person for the job and calculate individual rates, so you can get a true picture of the cost of your project. Used side-by-side with Verto's timesheet module, you'll be able to see the expected and actual costs of all the time spent.



Resourcing
Heatmap

Project Managers	09/06/2025 32.00hrs	10/06/2025 40.00hrs	11/06/2025 40.00hrs	12/06/2025 32.00hrs	13/06/2025 40.00hrs	14/06/2025 40.00hrs
Sophie Hall	32.00 hrs 100.0%	40.00 hrs 100.0%	40.00 hrs 100.0%	32.00 hrs 68.8%	0.00 hrs 0.0%	30.00 hrs 75.0%
Bob Estrada	16.00 hrs 50.0%	36.00 hrs 90.0%	36.00 hrs 90.0%	8.00 hrs 25.0%	38.00 hrs 95.0%	38.00 hrs 95.0%
Beth Mason	32.00 hrs 100.0%	4.00 hrs 10.0%	2.00 hrs 5.0%	12.00 hrs 37.0%	2.00 hrs 5.0%	2.00 hrs 5.0%
Luke Newman	16.00 hrs 50.0%	0.00 hrs 0.0%	0.00 hrs 0.0%	18.00 hrs 56.0%	0.00 hrs 0.0%	20.00 hrs 50.0%
Duncan Scott	8.00 hrs 25.0%	0.00 hrs 0.0%	0.00 hrs 0.0%	32.00 hrs 37.0%	0.00 hrs 0.0%	0.00 hrs 0.0%
Chris Jackson	8.00 hrs 25.0%	0.00 hrs 0.0%	0.00 hrs 0.0%	32.00 hrs 100.0%	40.00 hrs 100.0%	10.00 hrs 25.0%
Natasha Wilson	32.00 hrs 100.0%	16.00 hrs 40.0%	40.00 hrs 100.0%	8.00 hrs 20.0%	20.00 hrs 50.0%	0.00 hrs 0.0%

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. Financial integrations with systems such as SAP, Oracle, Pegasus, Agresso, can be achieved to ensure Verto remains the central repository for analysis / reporting purposes.

Timesheet

Timesheet Records Hierarchy View

	Total Hours	Total Approved Hours	Total				
▼ PR000017 Building Refurbishment	40	1260					
▼ 24 February	14	0.00					
▼ Craig Dawson	14	0.00					
	Mon 24	Tue 25	Wed 26	Thu 27	Fri 28	Sat 1	Sun 2
PR000017 Building Refurbishment 0001 Site advertised	4.00	7.00	3.00	3.00	0.00	0.00	0.00
PR000017 Building Refurbishment 0003 Invitation to...	2.00	0.00	4.00	2.00	0.00	0.00	0.00
	6.00	7.00	7.00	5.00	0.00	0.00	0.00

Timesheet Management

Complete timesheets within Verto to reflect the actual time spent on completing a task.

Verto knows which projects an individual user is assigned to and will only show the relevant tasks to ensure quick but accurate time recording.

The submissions will then go through an approval before the time is added to the project record.

“It’s been challenging trying to build an online project management system that works for such a dynamic and varied organization such as ours. The Verto team has been a great support in our goal to introduce a system which gives a repository of information, supports our approach to reporting, and ultimately helps create the right culture to flourish in our delivery of some really ambitious projects across the West of England and further afield.”

Kevin Hunter,
Patient Safety Programme Manager,
Health Innovation West of England

Integrations

Verto can be integrated with any accessible system. Our integrations are typically tailored to suit the requirements of each client. We have integrated with numerous financial systems (SAP, Agresso, Oracle) as well as numerous identity providers (including Active Directory) and timesheet management systems.

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 overlaid 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.



Find out how Verto can help your organisation today
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Custom Notifications

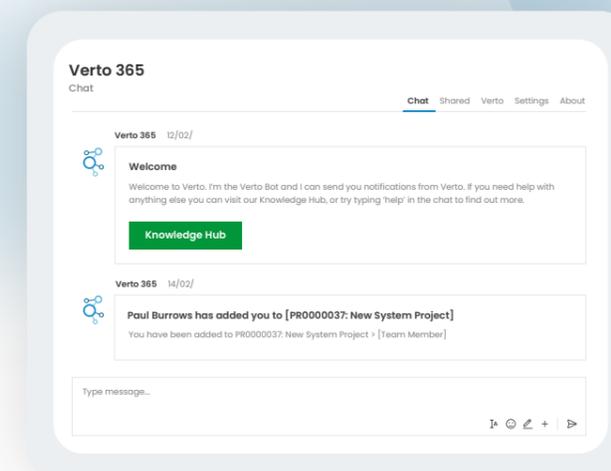
User-defined automated risk alerts and notifications appropriate to the level of involvement, including approvals, missed dates and other tasks and milestones can be set up through the app and now, within the Verto Bot via your Teams channel.

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.



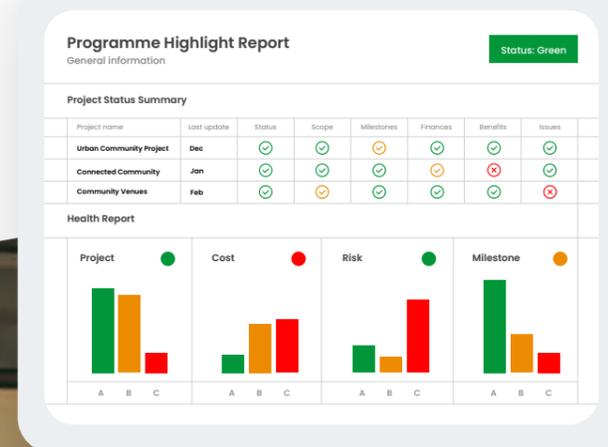
Performance Management

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.

Workflow Configuration

Configuration Verto's workflows can be configured, which allows workspaces and projects to move through a defined set of stages and approvals. Workflows can be set up in multiple ways by different teams and departments across the organisation according to project size and complexity. Customised to incorporate PMO or SMT sign off at any stage. All changes, requests and approvals are recorded providing a complete audit trail.



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.

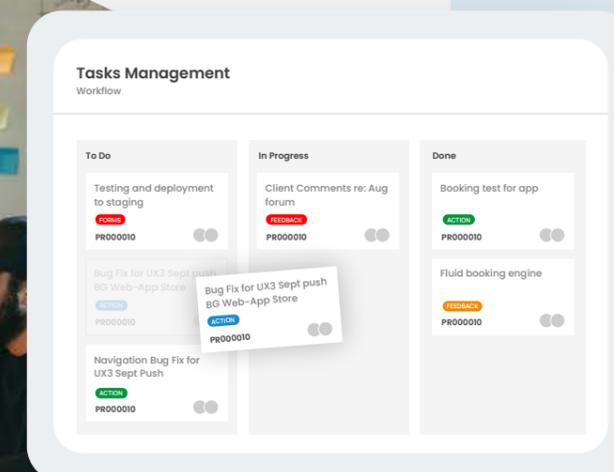
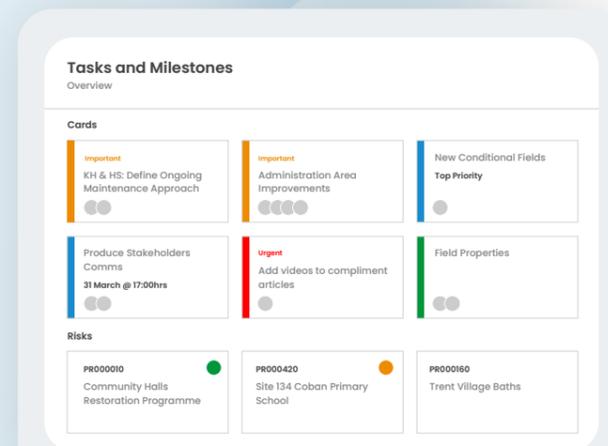
Cards hold information such as statuses, due dates, members, custom tags, additional documents and much more. A variety of templates can help you get started, but you can create your own as required.

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.

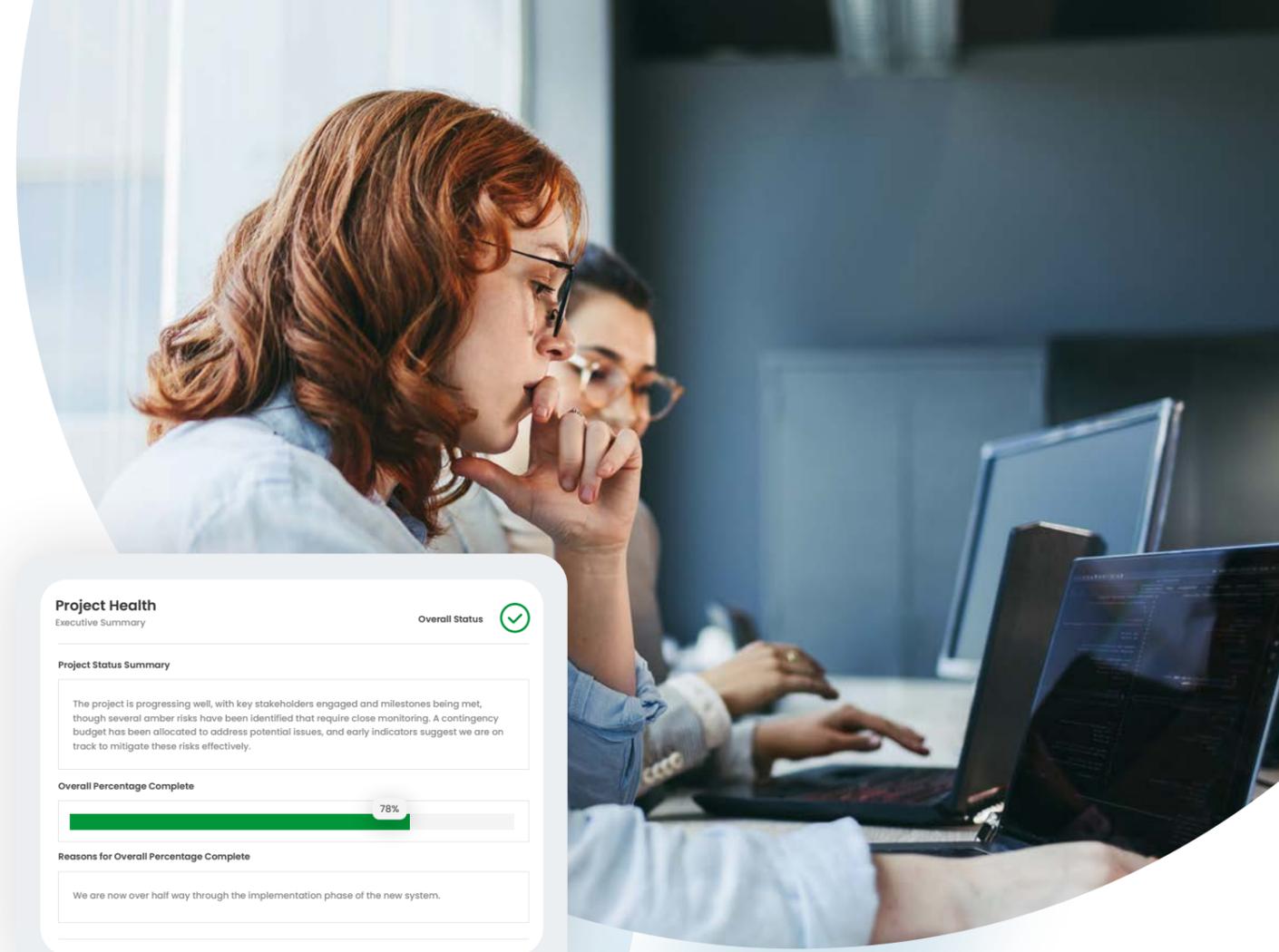
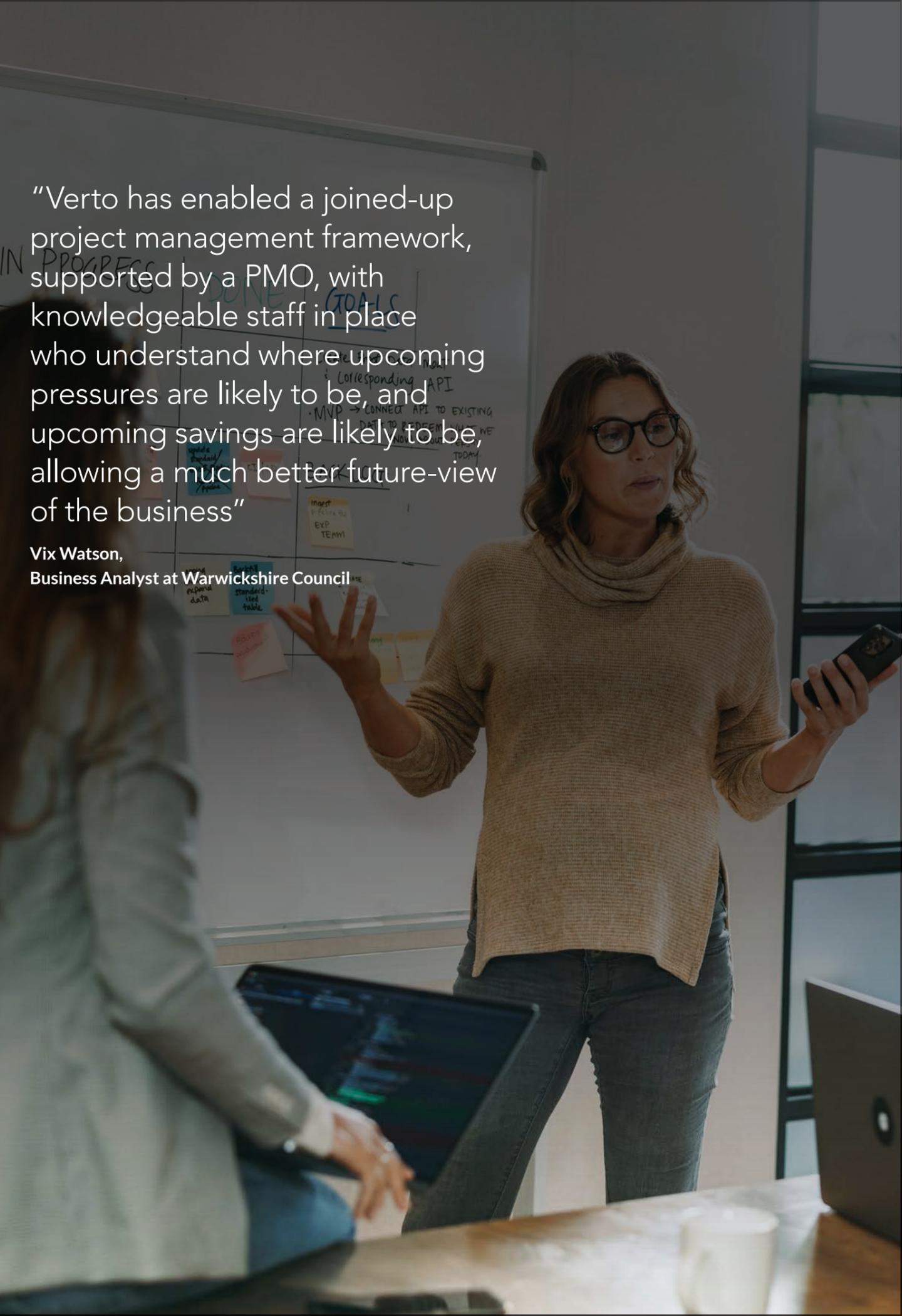


Audit Trail

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.

“Verto has enabled a joined-up project management framework, supported by a PMO, with knowledgeable staff in place who understand where upcoming pressures are likely to be, and upcoming savings are likely to be, allowing a much better future-view of the business”

Vix Watson,
Business Analyst at Warwickshire Council



Project Health

Executive Summary Overall Status ✔

Project Status Summary

The project is progressing well, with key stakeholders engaged and milestones being met, though several amber risks have been identified that require close monitoring. A contingency budget has been allocated to address potential issues, and early indicators suggest we are on track to mitigate these risks effectively.

Overall Percentage Complete

78%

Reasons for Overall Percentage Complete

We are now over half way through the implementation phase of the new system.

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.

External Forms

External forms are used to gather data that is initially generated outside of the system. Examples would be project idea forms, funding applications and company engagement forms.

These submissions can be completed by anyone, they don't need to be a Verto 365 licence holder so, the possibilities are wide-ranging.

Those who complete these external forms will receive an email upon starting a form with a link to give them direct access to pick up where they left off, so they don't have to complete the form in a single sitting. The forms can be configured by your administrators using multiple field options within Verto 365 to suit your organisation's exact requirements.

All the data submitted will be added directly to the Verto 365 database which means there's no need for re-writing and no duplication of effort. It's all reportable and can progress through the normal project stages if needs be.



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