

WHAT FEATURES DO  
YOU NEED IN A  
REPORTING TOOL?  
**CHECKLIST**



DIRECTIONS: Check off each reporting feature that your organization needs. After that, you'll have a list of features and descriptions to share with your executive team, or copy and paste it into an RFP for reporting software.

## SCORECARDING



### **Strategy Mapping**

Paint a picture of your strategy by dragging and dropping objectives, measures, and initiatives onto a balanced scorecard report template.



### **Strategy Objectives**

Add and track progress toward your objectives or goals within your reporting software system.



### **Strategic Objectives & Themes**

Organize your strategy and goals into the four perspectives of the balanced scorecard—financial, customer, internal, and learning and growth.



### **Strategy Measures**

Create specific metrics you want to track, like "customer satisfaction rating," in order to see how well you're doing against your objectives. Set targets for these measures.



### **Balanced Scorecard Templates**

Unite your organization's people, goals, and numbers in one place with ready-to-go templates you can customize for your balanced scorecard.

## DASHBOARDING



### **Charting Options**

Customize and visually display your data through bar, line, pie, area charts, and more. Create multiple charts per measure with unlimited measure series.



### **Unlimited Data Series**

Analyze as many different data sets as you want against each other, so you can move beyond the standard X and Y axis comparison.



### **Automatic Evaluations**

Enter your targets and evaluation criteria once, and let the application automatically determine your RAG (red-amber-green) status.



### **Complex Calculations**

Build complex calculations that can source data from anywhere in the application. Create roll-ups, sums, and averages to analyze your data.



### **Parent/Child Relationships**

Group various elements together by showing relationships between elements, allowing drill-down analysis.

## PROJECT MANAGEMENT



### **Gantt Charting**

Quickly visualize your project management process with Gantt charts and see how your due dates are progressing over time.



### **Strategic Initiatives**

Give visibility to your initiatives by entering objectives and tracking start and end dates, milestones, and any necessary resources in one view.



### **Cascading Milestones**

Arrange your milestones and due dates in sequential order, and automatically adjust the entire project by moving one milestone.



### **Milestone Date Calculations**

View automatically calculated numbers, like days until completion, percent complete, and due dates, based on the length of the project.



### **Project Measures**

Input any type of measure, tie it to an initiative, and automatically see how you are doing compared to your target.

## **MEETING MANAGEMENT**



### **Offline Reports**

Quickly create an interactive PDF with the information you need so you can view and share reports without an internet connection.



### **Qualitative Analysis**

Add color commentary to your reports and visuals so your team can see what the numbers say about the direction you need to take.



### **Action Items & Risks**

Easily record to-do lists from a meeting (or on the fly) so people are accountable for moving the project in the right direction.



### **PDF Exports**

Create and distribute a PDF briefing book with whatever information and charts you need. Create templates for frequently used reports so they can be generated immediately.



### **XLS Exports**

Export reports to fully-formatted Excel spreadsheets that preserve the look and feel of the online report. Use these reports to paste data back into the application.

## **CUSTOMIZATION**



### **Custom Number Formats**

Create any type of number format you'd like so you aren't constrained by the one the system serves up.



### **Custom Fields**

Create any type of form field in order to track information that fits your needs. Use these custom fields in detail and summary layouts.



### **Custom Menus & Language**

Customize the language of the application to meet the language you currently use in reports (i.e., Metric, Measure, or KPI).



### **Custom CSS**

Get into the code in order to have full control over the look and feel of your interface. Customize page colors, fonts, spacing, margins, and backgrounds.



### **Custom Table Views**

Switch rows and columns and shuffle around data so it's just right for your viewing.



### **Custom Page Layouts**

Drag and drop elements to quickly lay out pages while having full control over the way you view each page layout.

## SHARING & COLLABORATION



### Global Access

Securely log into your account from anywhere in the world, not just the computers in your office.



### Multilingual

Support users that speak different languages (Spanish, French, Portuguese, German, Italian, Arabic, etc.) and right-to-left data input where applicable.



### Threaded Discussions

Run discussions around certain topics in your reporting system so everything is in one place, rather than in notepads and emails.



### Publishing

Ability to publish static reports from the system that can be used to communicate reports externally.



### Email Notifications

Sign up for notifications when things change or whenever you want them. Mark elements as "favorite" and get notified whenever these elements are updated.

## EASE OF USE



### Mobile Applications

Access your reporting software on the go through iOS and Android applications designed specifically for use on your phone or tablet.



### Cloud-Based System

Access the software from anywhere through an internet browser and keep the strain off of your servers.

## DATA INTEGRATION



### API

Allow for data to flow from your system to your reporting software seamlessly through an API. Or use the API to pull data from your reporting software into other applications.



### Data Loader

Upload data to the reporting application via a standalone application that installs on your desktop and securely pushes data to the application on demand or on a schedule.



### XLS or CSV Import

Upload metric data to the reporting application through an Excel or CSV file. Upload the file directly to the application or use an offline data loader to schedule uploads.



### SQL Connection

Send data that lives in on-premise SQL servers securely to the reporting application without the need for complex VPNs or other workaround solutions.



## SECURITY



### **Audit Logging**

Automatically track, view, and search which user changed what and when. Search and print the audit log.



### **Role-Based Security**

Assign different roles to users so some can change the entire system and others can simply view data.



### **Single Sign-On**

Log in to your reporting software with the same credentials you use for other systems. Leverage your existing security and password policies to stay in compliance.

## PRICING



### **View-Only (Browser) Pricing**

Cost-effective read only access via free or low-cost licenses for users that only need browser-level access to the system.



### **Editor Or Administrator Pricing**

Affordable per-user licenses for users that need editor or administrator access to the system.

Take a tour of ClearPoint to see  
our reporting features in action.