***User story <Number>: Create Custom reporting for business users to track the client data***

*Description:*

As a PMO Core team member, I should be able to pull the custom report so that I can view only the data that I need

*Assumptions:*

1. End users should have required permissions to access the reports
2. Reporting module should be displayed on the top right corner of the tool

*Acceptance criteria:*

*UI Requirements:*

Refer to the attached mock-ups and build a new screen under reporting

1. Field name: Report Type

Field Type: DD

Mandatory field

Drop down values:

1. Master Report
2. Custom Report

Business logic: Once end user click Custom report, below additional fields should get displayed

1. Field name: Year

Field type: DD

Drop down values: +/- 5 years to current year

Mandatory field

1. Field name: State

Field type: DD

Drop down values: List of all states in United states

Mandatory

Business logic: Based on above selected Values, details of all the clients based on above mentioned filter should get populated in the next screen. Refer to Screen(2) mock up and display all the below mentioned client details with a Check box so that end user should be able to either select all or multi select the client details to be displayed in the report.

1. Client name – Pull the value from: <Database reference>/<UI reference>
2. Client address – Pull the value from: <Database reference>/<UI reference>
3. Mortgage type – Pull the value from: <Database reference>/<UI reference>
4. APR – Pull the value from: <Database reference>/<UI reference>
5. Appraisal – Pull the value from: <Database reference>/<UI reference>
6. Term – Pull the value from: <Database reference>/<UI reference>
7. DTI- Pull the value from: <Database reference>/<UI reference>
8. EMD - Pull the value from: <Database reference>/<UI reference>

*Business rules:*

Rule 1: Client documents such as Titles, Insurance documents, closing disclosures should not be included.

Rule 2: When a user tries to download the custom report, system should download the report to secured location approved by the BISO standards

*Impact areas/Backward Compatibility:*

Reporting

Audit