

Portfolio Settings

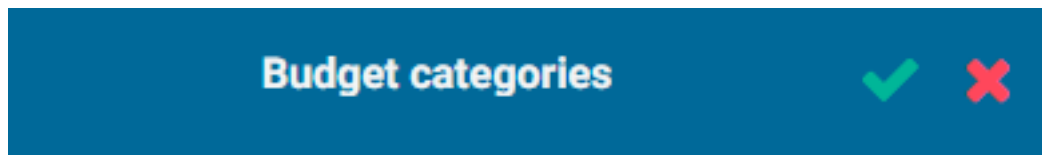
Portfolio Settings: Budget Categories

Budget Categories allow you to further refine the financial information of the portfolio by sorting its expenses by category. If you use cross-cutting activities, you'll be able to enter budget categories information in those activities.

From the **Portfolio** page, click Settings to enter the module, then select Budget Categories from the horizontal navigation.

The screenshot displays the 'Settings' page for 'Budget Categories' in the DELTA PROJECT PORTFOLIO. The interface includes a sidebar with navigation options like Home, Settings, and Proj. Mgmt. The main content area shows a table with columns 'Code' and 'Name', containing one entry: 'ENG' for 'Engineering'. A '+ Add' button is located at the top right of the table. The bottom status bar indicates 'Currently Connected: 1 User' and 'Copyright DELTA Monitoring & Evaluation ©'.

To **add a budget category**, click +Add at top left of the list grid and enter a code and a name for the category.

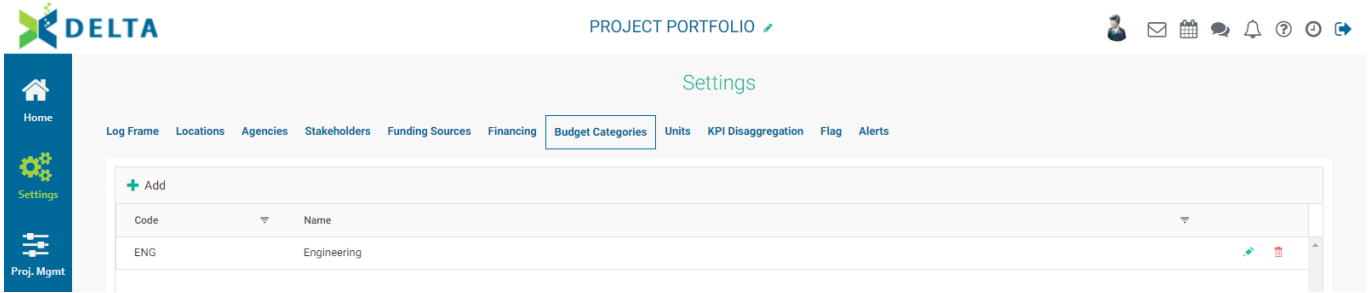


Code*

Name*

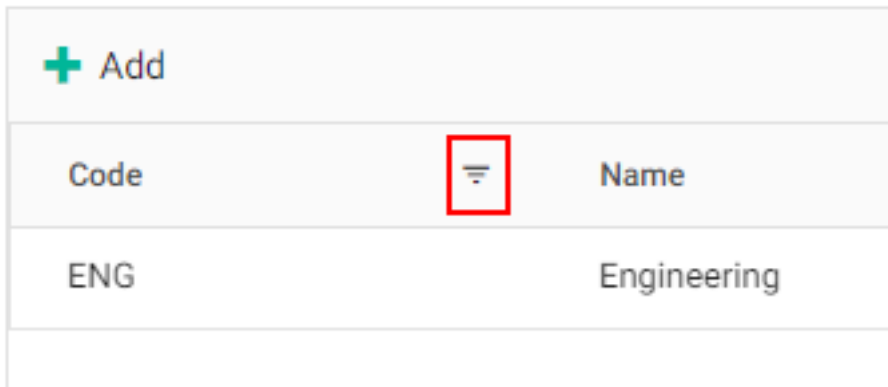
Click the checkmark in the popup window title bar when you're done to save your work and return to the Budget Categories screen. The new budget category will appear in the list. **NOTE:** you cannot edit the code once you've saved the budget category.

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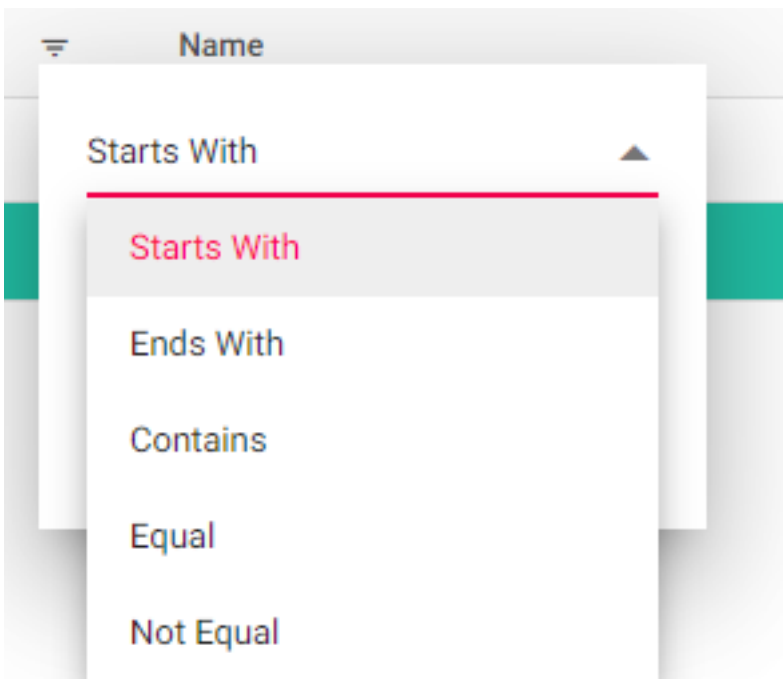


To **edit a budget category**, click its Edit icon. To **delete a budget category**, click its Delete icon and confirm the deletion.

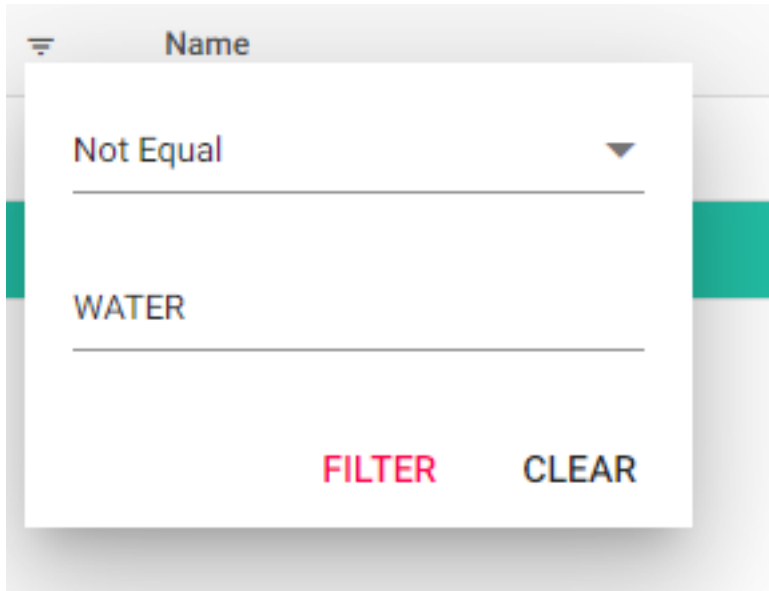
To quickly find a category in long lists, use the **Filter** to narrow down the displayed list.



Enter a selection criterion for the filter, and enter the value you're looking for.



Portfolio Settings



Not Equal

WATER

FILTER **CLEAR**

Click Filter to enable your selected parameters. The list will be filtered according to your settings.

NOTE: the Filter icon will change from black to red when a filter is applied.

To go back to the full list, click the Filter icon again and select Clear.

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