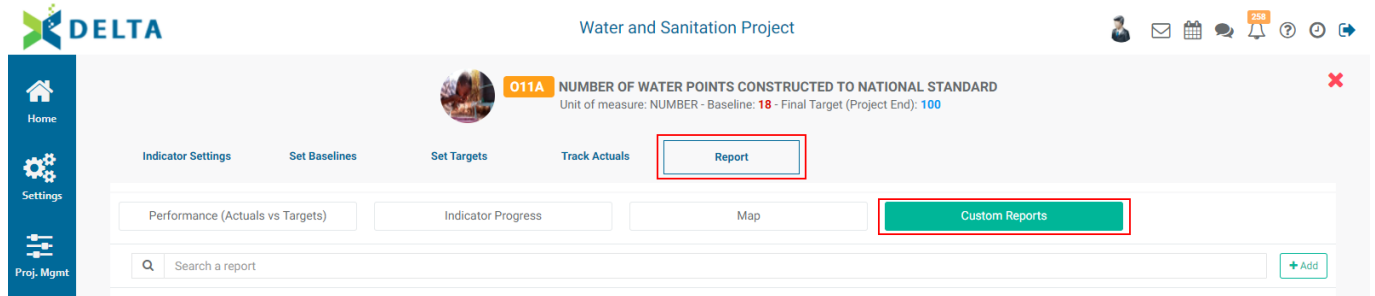


Indicators (KPIs)

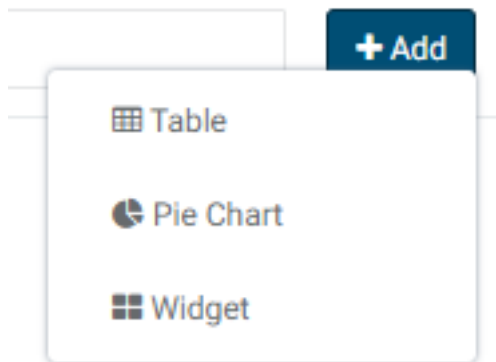
Indicators: Custom Reports

In addition to Delta's built-in reports for indicators, users can also create **Custom Reports**. Three types of custom reports are available for indicators: [Table](#), [Pie Chart](#), and [Widget](#).

From inside the indicator, select **Report**, then click **Custom Reports**.



Click the **+Add** button at top right to bring up the report format selection menu, then select the type of report you want to create.



Select **Table** to bring up the Custom Reports - Table popup window.

Indicators (KPIs)

Custom Reports - Table



Description

Filters

Report Title *



Report Description

Rows*

Period



Public



Save in Dashboards



Portfolio

OK

Enter a **title** for the report (mandatory) and a short **description** (optional but recommended). To change the color of the report icon, click the color block next to the report title and select the desired color from the color picker.

Select the basis for the report from the **Rows** pick list.

Rows*

Period

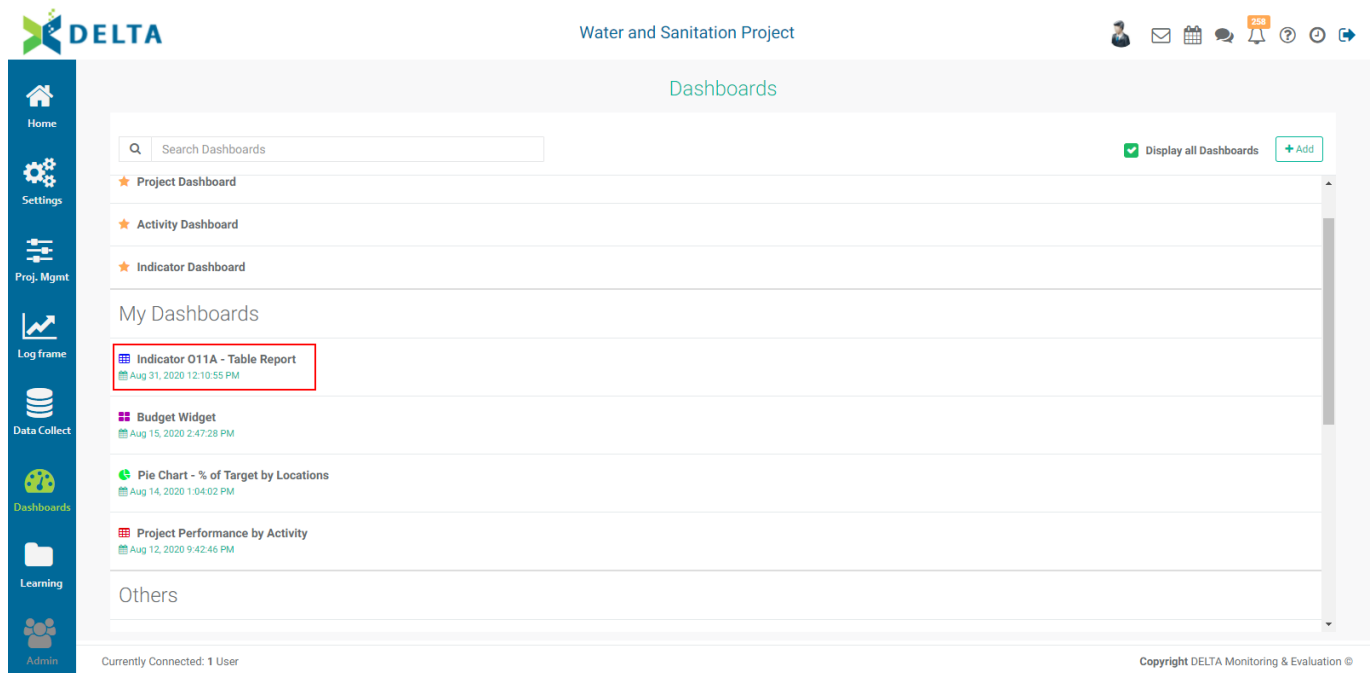
Period

Locations

To make this report available on the public portal, check the **Public** box. Anyone with the link to the portal (login page) will be able to view the report without system access credentials.

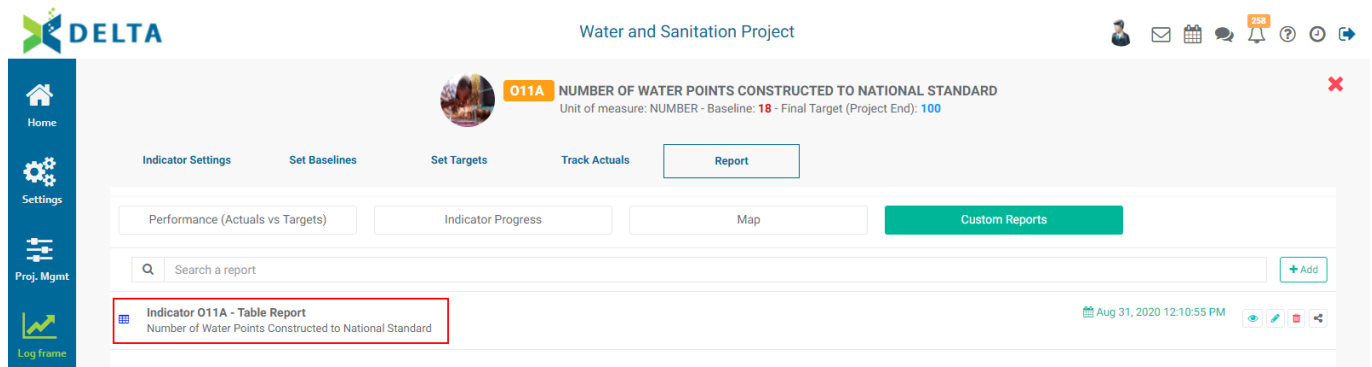
Indicators (KPIs)

Check **Save Report in Dashboards** to make this report available to other users for their dashboards. You will see the report in the My Dashboards section of the Dashboards module; other users will see it in their Others list.



Checking the **Portfolio** box will make this report available at the Portfolio level. The reports' names appear in the Portfolio Dashboard pick list, sorted by project and type (Activities, Indicators, Forms), and can then be used for multiproject dashboards. **NOTE:** all project reports are automatically available to be added to **project** custom dashboards.

Click OK to save your work and return to the Custom Reports screen. The new report will appear on the page. Reports are sorted by most recent in descending order.



To **view the report**, click its name in the list, or click the report's View icon in its toolbar.

Indicators (KPIs)

The screenshot shows the DELTA Water and Sanitation Project dashboard. The main indicator is '011A NUMBER OF WATER POINTS CONSTRUCTED TO NATIONAL STANDARD' with a unit of measure of 'NUMBER'. The baseline is 18 and the final target is 100. The report is titled 'Indicator 011A - Table Report' and shows data for Global, 2015, and 2016. The table has columns for Target Value, Actual Value, Variance, % of Target, Budget, and Actual cost. The data is as follows:

	Target Value	Actual Value	Variance	% of Target	Budget	Actual cost
Global	827.00	636.00	-191.00	76.90%	0.00	0.00
2015	216.00	145.00	-71.00	67.13%	0.00	0.00
Mar 31, 2015	74.00	32.00	-42.00	43.24%	0.00	0.00
Jun 30, 2015	49.00	41.00	-8.00	83.67%	0.00	0.00
Sep 30, 2015	49.00	37.00	-12.00	75.51%	0.00	0.00
Dec 31, 2015	44.00	35.00	-9.00	79.55%	0.00	0.00
2016	255.00	206.00	-49.00	80.78%	0.00	0.00

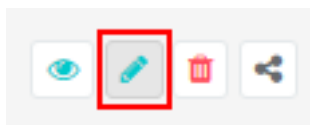
While viewing the report, several additional display options become available. Click the vertical More menu in any column to size and/or sort it, or select which columns to show/hide. The functionality is the same as the corresponding functions in Excel.

The screenshot shows the DELTA Water and Sanitation Project dashboard with the Indicator 011A report. The 'Columns' menu is open, showing options to 'Autofit all columns', 'Autofit this column', 'Sort Ascending', 'Sort Descending', and a list of columns to show/hide. The columns listed are: label, Target Value, Actual Value, Variance, % of Target, Budget, Actual cost, Budget Variance, and % of Budget. The data is as follows:

	Target Value	Actual Value	Variance	% of Target	Budget	Actual cost
Global	827.00	636.00	-191.00	76.90%	0.00	0.00
2015	216.00	145.00	-71.00	67.13%	0.00	0.00
Mar 31, 2015	74.00	32.00	-42.00	43.24%	0.00	0.00
Jun 30, 2015	49.00	41.00	-8.00	83.67%	0.00	0.00
Sep 30, 2015	49.00	37.00	-12.00	75.51%	0.00	0.00
Dec 31, 2015	44.00	35.00	-9.00	79.55%	0.00	0.00
2016	255.00	206.00	-49.00	80.78%	0.00	0.00

To **close a report**, click the X at top right.

To **edit a report**, click the Edit icon in its toolbar.



Delta supports the use of **Filters** in indicator table reports. Click the Filters tab in the Custom Reports - Table popup window to create and configure the filters you want to use.

Indicators (KPIs)

Custom Reports - Table 

Description

Filters

Add Filter



✓ OK

To **add a filter**, click the + button. The filter parameter fields will appear.

Custom Reports - Table 

Description

Filters

Add Filter

Field*

Location Code

Operation*

Equal

Value *

✓ OK

Cancel

✓ OK

In the example above, the Location Code is the only choice in the **Field** pick list because this report is based on periods. Conversely, if the report is based on Locations, the Field pick list will only contain Year.

Select how the data will be filtered from the **Operation** pick list.

Indicators (KPIs)

Custom Reports - Table

Description

Filters

Add Filter

Field*

Location Code

Value *

Operation*

Equal

Equal

Not Equal

Greater than

Greater or Equal to

Less than

Less than or equal to

Start with

Do not start with

Ends with

OK

Select the **value** of the filter. For example, you might select 'Equal to' from the Operator pick list and enter '2016' as the value for a filter based on Year.

Click the OK button next to Cancel to save your work. The new filter will appear in the popup window.

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Indicators (KPIs)

Custom Reports - Table

Description

Filters

Add Filter

1

Year Equal 2016

✓ OK

If you're done, click OK at bottom right to close the popup window and return to the Custom Reports screen.

You can add as many filters as are needed. If you create more than one filter, you also need to add logic for the system to know how to handle multiple filters. The logic is simply **AND/OR**, and the correct syntax uses the number of the filter. In the example below, the logic is 1 OR 2, so either condition must be met. The AND operator requires that all conditions must be met, while the OR operator requires that at least one condition must be met.

Indicators (KPIs)

Custom Reports - Table

Description

Filters

Chaining filters AND / OR *

1 OR 2

Add Filter

+

1

Year Equal 2016

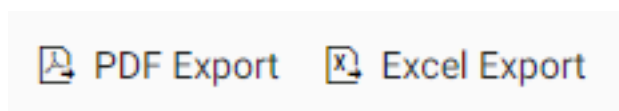
2

Year Equal 2017

✓ OK

To **delete a filter**, click its Delete icon in the Filters tab of the Custom Report - Table popup window.

To **export a Table report**, open the report, then select the format for the export from the top left of the table.



To **share a report**, click the Share icon in its toolbar, then enter a comment to enable the Share With tab.

Indicators (KPIs)

Share Comments

Comments

Share with

B

U

Roboto

A

Enter a comment on this report here to activate the Share With tab.

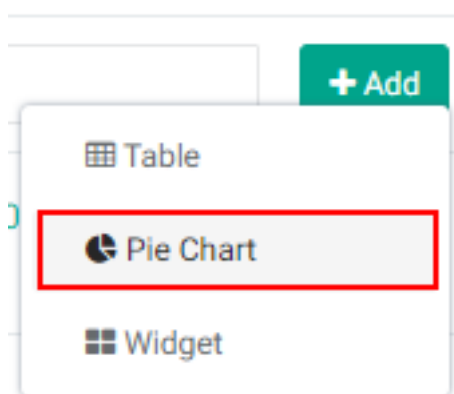
✓ OK

If you need more space for your comments, click, hold, and drag the three small bars at the bottom centre of the comment box to enlarge it.

Click the **Share With** tab to bring it to the front, select the recipients, then click OK. Recipients will be notified via a small dot badge on the Chatroom icon of the main toolbar at the very top right of the screen.

To **delete a report**, click the Delete icon in its toolbar.

The second type of indicator report is **Pie Chart**. From the Custom Reports list page, click the +Add button and select Pie Chart from the menu.



The Custom Reports - Pie Chart popup window will appear.

Indicators (KPIs)

Custom Reports - Pie Chart

1 Parameters2 Filters

Report Title *

☒ Public☐ Save in Dashboards☐ Portfolio

Based on *

Period

Field *

% of Target

OK

Enter a report title, change the color if desired, and check/uncheck the **Public**, **Save in Dashboards**, and **Portfolio** boxes. These options work in an identical manner to the corresponding ones in [Table](#) reports.

Select the **basis** for the report. As is the case for Table reports, the options are **Period** and **Locations**.

Based on *

Period

Period

Locations

Select the field to graph in the pie chart from the **Field** pick list.

Indicators (KPIs)

Field *

% of Target

Target Value

Actual Value

Variance

% of Target

Budget

Actual cost

Budget Variance

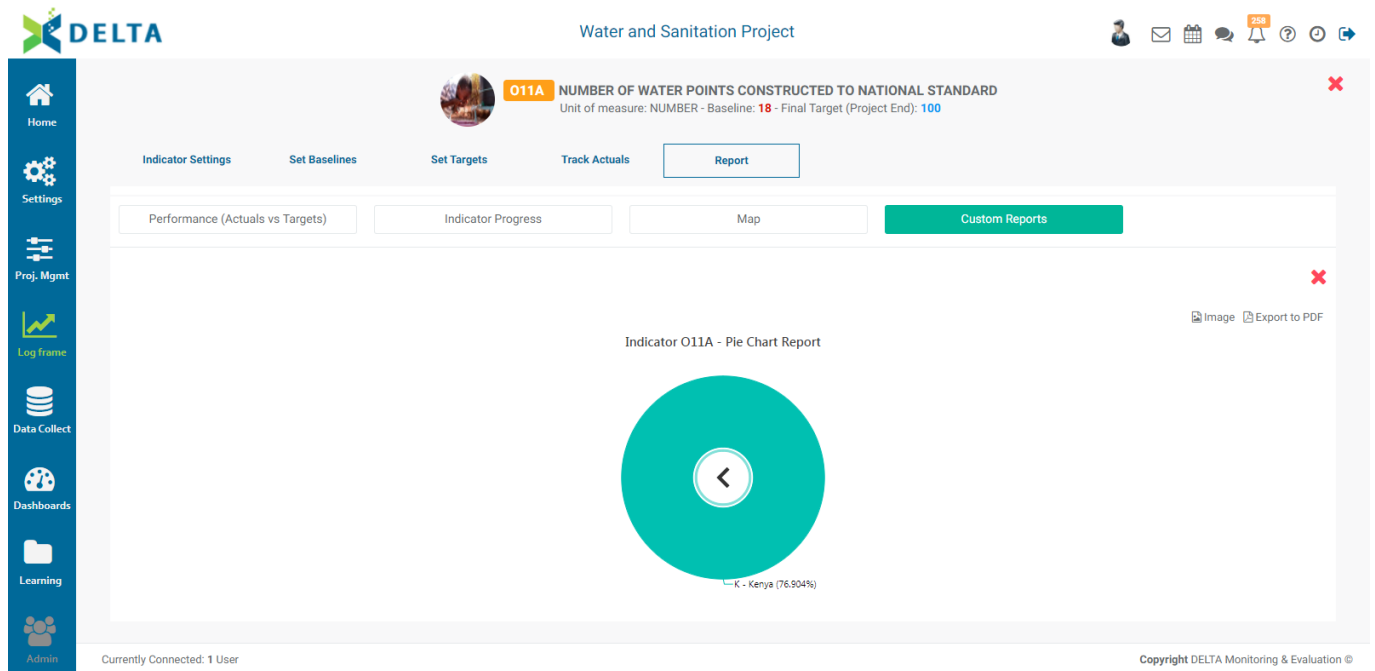
% of Budget

Click OK to save your work and return to the Custom Reports list page. The new report will appear in the list.

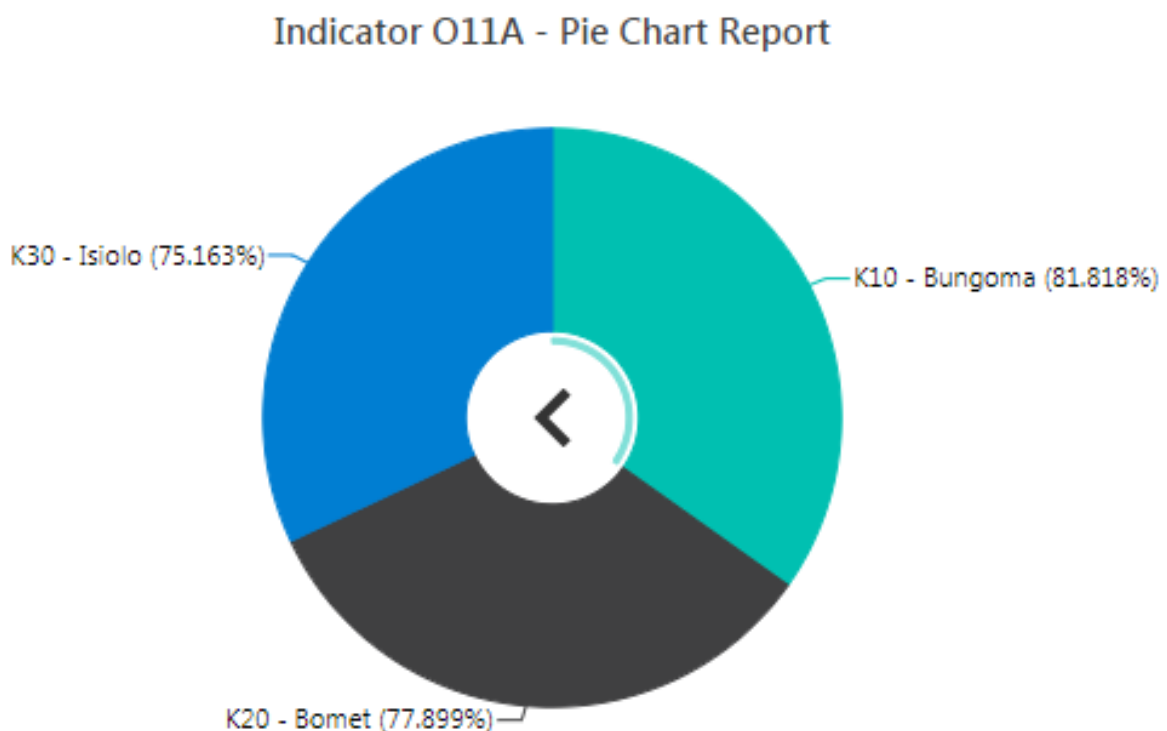
The screenshot displays the DeltaGIS interface for a 'Water and Sanitation Project'. The top navigation bar includes the Delta logo, project name, and user profile. A sidebar on the left contains icons for Home, Settings, Project Mgmt, Log frame, and Data Collect. The main content area shows the 'Indicator Settings' tab selected, with a sub-tab 'Report' active. Below this, there are tabs for 'Performance (Actuals vs Targets)', 'Indicator Progress', and 'Map'. A 'Custom Reports' button is visible. A search bar is present, and a list of reports is shown. The first report, 'Indicator O11A - Pie Chart Report', is highlighted with a red box. It includes a date 'Aug 31, 2020 3:55:43 PM' and a toolbar with icons for view, edit, delete, and share. The second report, 'Indicator O11A - Table Report', is also listed with a date 'Aug 31, 2020 12:50:38 PM' and a similar toolbar.

As is the case with Table reports, each Pie Chart report has its own toolbar with the same icons. To **view the report**, click its name in the list, or click its **View** icon.

Indicators (KPIs)



The default view is Global, and the graph shows the aggregated value for the selected basis, in this case Locations. To drill down into the data, click any colored portion of a graph to get its details.

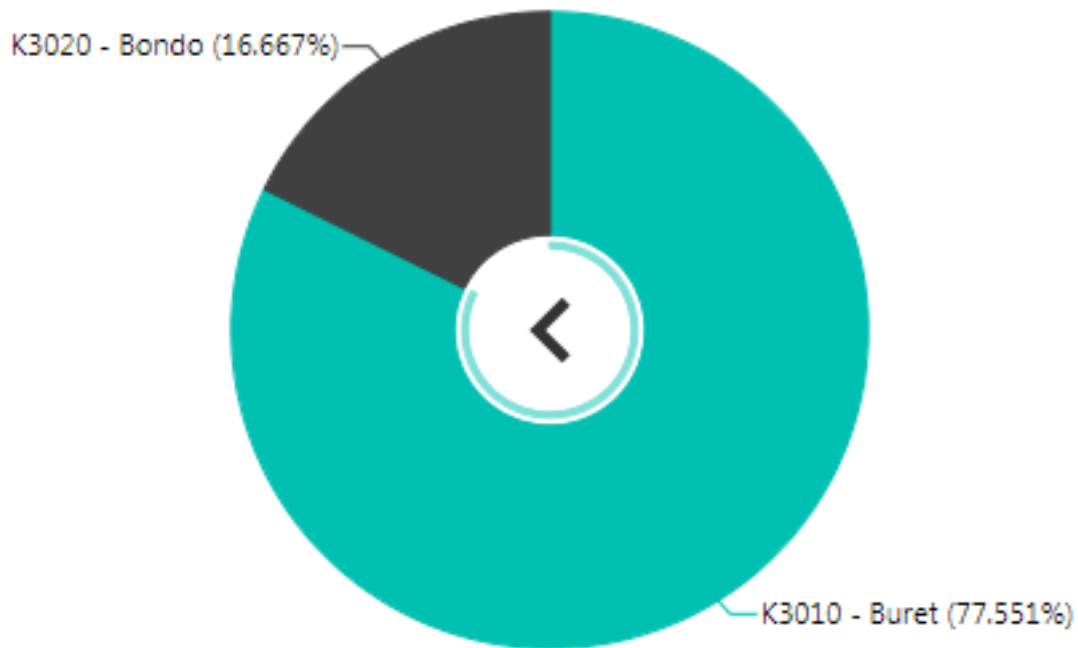


How far you can drill down depends on what the indicator's Geography Division was set at when the indicator was created (for Locations) or which reporting period was selected in the indicator's Frequency of Collection (for Periods).

Continue to click on any colored portion of a pie chart to drill down.

Indicators (KPIs)

Indicator O11A - Pie Chart Report



Indicator O11A - Pie Chart Report



To go back to the previous level, click on the caret (<) in the middle of the pie chart.

To **export a pie chart report**, click on the desired format at top right. The options are Image and PDF. Images generated by the Image export are in PNG format.

Indicators (KPIs)

 Image  Export to PDF

To **edit a pie chart report**, click its Edit icon.

The **Filters** functionality for pie chart reports is identical to that for table reports. Click the Filters tab in the Custom Reports - Pie Chart popup window to bring it to the front, and create the filter(s) you need.

Custom Reports - Pie Chart

1 Parameters

2 Filters

Add Filter

Field*

Select an Option

Operation*

Equal

Value *

✓ OK

Cancel

✓ OK

The third type of indicator custom report is **Widget**. Widgets display **single data items**, making it easy to have lots of at-a-glance information in a dashboard without taking up a lot of space.

From the Report page of the indicator, click the +Add button at top right and select Widget.

+ Add

Table

Pie Chart

Widget

The Custom Reports - Widgets popup window will appear.

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Indicators (KPIs)

Custom Reports - Widget ✕

1 Parameters

2 Filters

Report Title *

☒ Public ☐ Save in Dashboards ☐ Portfolio

Field *

% of Target ▼

✓ OK

Enter a **title** for the report. Since there is very little context for widgets, we recommend as a best practice that you be as specific as possible when writing a title for the widget report.

Change the **color** if desired by clicking the color block in the report title field and selecting a new color from the color picker. The icon for the widget will appear in the selected color in the Custom Reports list.

Check/uncheck the **Public**, **Save in Dashboards**, and **Portfolio** boxes. These options work in an identical manner to the corresponding ones in [Table](#) and [Pie Chart](#) reports.

Select the single data point you want to display from the **Field** pick list.

Indicators (KPIs)

Custom Reports - Widget

1 Parameters

2 Filters

Report Title *

Public

Save in Dashboards

Portfolio

Field *

% of Target

Target Value

Actual Value

Variance

% of Target

Budget

Actual cost

Budget Variance

% of Budget

If you're done, click OK to save your work and return to the Custom Reports list. The new report will appear on the page.

DELTA

Water and Sanitation Project

Home

Settings

Proj. Mgmt

Log frame

Data Collect

O11A

NUMBER OF WATER POINTS CONSTRUCTED TO NATIONAL STANDARD

Unit of measure: NUMBER - Baseline: 18 - Final Target (Project End): 100

Indicator Settings

Set Baselines

Set Targets

Track Actuals

Report

Performance (Actuals vs Targets)

Indicator Progress

Map

Custom Reports

Search a report

+ Add

Indicator O11A - % of Target Widget

Aug 31, 2020 4:36:28 PM

Indicator O11A - Pie Chart Report

Aug 31, 2020 3:55:43 PM

Indicator O11A - Table Report

Number of Water Points Constructed to National Standard

Aug 31, 2020 12:50:38 PM

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Indicators (KPIs)

Widgets support the use of **Filters**. To **edit a widget report**, click the Edit icon in its toolbar and make the necessary changes, including adding filters. The functionality is identical to the filters available for Table and Pie Chart reports.

Unless you create filters which drill down into the data, for example by specific period or precise location, the widget will display the overall data point for the entire project to date.

Indicator O11A - % of Target Widget

76.90%

Widgets can be shared in the same way as Table and Pie Chart reports. There is no export functionality for widget reports.

Previous: [Indicators: Built-In Reports](#) | Next: [Indicators: Other Settings](#)

Unique solution ID: #1123

Author: n/a

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