

Project Management

PM: Project Reports: Table Reports

The **Project Reports** screen regroups all the reports created for the project from a performance and budget standpoints. The data for these reports are derived from [activities actuals](#). These reports therefore reflect the business intelligence (BI) aspects of project results: project performance, and budget/costs.

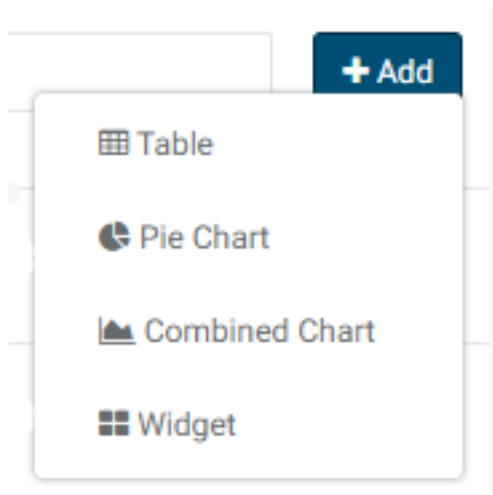
From the Project Management module, click the **Project Reports** tab to create and view activity reports. ⁽¹⁾

The screenshot shows the DELTA Project Management interface for the 'Water and Sanitation Project'. The 'Project Reports' tab is highlighted in the top navigation bar. Below the tab, there is a search bar and a list of reports. The reports include:

- % Target by Location
- Budget Widget
- Pie Chart - % of Target by Locations
- Project Performance by Activity (This report shows the project performance by activity.)
- << Project Performance by Activity as of December, 2018 >>
- Budget Consumption per County as of Dec. 2018
- Budget breakdown by location (FY 2018)
- Budget 2015- 2017

Each report entry shows a date and time, and icons for viewing, editing, deleting, and sharing. The bottom of the screen shows 'Currently Connected: 1 User' and 'Copyright DELTA Monitoring & Evaluation ©'.

To **create a custom report**, click the +Add button at top right to bring up the menu.



The first type of report is **Table**. This is a regular grid report. Select Table to bring up the Custom Reports - Table popup window.

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Custom Reports - Table

Description

Settings

Filters

Report Title *

Report Description

☒ Public

☐ Save in Dashboards

☐ Portfolio

The window contains three tabs: **Description**, **Settings**, and **Filters**.

Enter a title for the report (mandatory) and a description (optional, but recommended as a best practice).

Custom Reports - Table

Description

Settings

Filters

Report Title *

Project Performance by Activity

Report Description

This report shows the project performance by activity.

☒ Public

☐ Save in Dashboards

☐ Portfolio

Project Management

NOTE: once you've entered a title for the report, the Settings and Filter tabs will become active, as well as the checkmark in the popup window title bar.

The default color for the report icon is black. Select another color by clicking on the color block to the left of the Title box to bring up the color picker.

Custom Reports - Table

Description

Settings

Filters

Report Title *

Project Performance by Activity

the project performance by activity.

Save in Dashboards

Portfolio

Checking the **Public** box makes this report available to anyone. The Public option throughout Delta publishes selected project information to the Portal - the Delta login page - for access by anyone with the URL to the portal. This functionality is described in detail in [Accessing Delta: Delta's Public Portal](#).

Checking the **Save in Dashboards** box will show this report in the [Dashboards Module](#). It will appear in **My Dashboards** for you, and in **Others** for other users, who will then be able to add this report to their own dashboards.

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Project Management

DELTA

Water and Sanitation Project

Dashboards

Search Dashboards

Display all Dashboards + Add

My Favorite Dashboards

- Project Dashboard
- Activity Dashboard
- Indicator Dashboard

My Dashboards

- Project Performance by Activity
Aug 12, 2020 9:42:46 PM

Others

- Project Progress Overview
Dec 31, 1969 7:00:00 PM
This Dashboard displays Project performance by Activity, Budget consumption and Budget breakdown
- << Project Performance by Activity as of December, 2018 >>
Dec 31, 1969 7:00:00 PM

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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 can then be used for multiproject dashboards. **NOTE:** all project reports are automatically available to be added to **project** custom dashboards.

+

Search

Water and Sanitation Project

Activities

- Project Performance by Activity
- % of Targets reached by Location
- Project Progress by Year for Counties Bunguma and Isilo
- Budget 2015- 2017
- Budget breakdown by location (FY 2018)

In the **Settings** tab of the popup window, select the data set you want to use as the rows and columns of the table. The two pick lists are related: the options for both are Log Frame, Period, Locations, Financing Source, and Budget Categories. Each can only be used once in a table, so selecting one option from either of the pick lists removes it from the other one. In the example

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below, Period is selected by default in the Display By pick list, so it does not appear in the Rows pick list.

Rows*

Log Frame

Log Frame

Locations

Financing Source

Budget Category

Select the fields you want to display in the table by dragging and dropping them from the Fields list to the Columns list. Click, hold, and drag the fields in the Columns list to reorder them.

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Custom Reports - Table

✓

✗

Description

Settings

Filters

Rows*

Log Frame

Fields

Columns

Target

Actual

Budget

Actual cost

→

←

% of Target

% of Budget

Variance

Display data by*

Period

If you're done, click the checkmark in the popup window title bar to save your work and return to the Project Reports tab of the Project Management module. The new report will appear at the top of the list.

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DELTA Water and Sanitation Project

Project Management

Activity Plan & Budget Funds Disbursement Project Timeline **Project Reports** Staff Reports

Search a report + Add

Project Performance by Activity
This report shows the project performance by activity. Nov 16, 2020 11:51:02 AM

% Target by Location Sep 2, 2020 2:20:36 PM

Budget Widget Aug 15, 2020 2:47:28 PM

Pie Chart - % of Target by Locations Aug 14, 2020 1:04:02 PM

<< Project Performance by Activity as of December, 2018 >> Dec 31, 1969 7:00:00 PM

Budget Consumption per County as of Dec. 2018 Dec 31, 1969 7:00:00 PM

Budget breakdown by location (FY 2018) Dec 31, 1969 7:00:00 PM

Budget 2015- 2017 Dec 31, 1969 7:00:00 PM

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Reports are sorted by most recent first. They also feature a timestamp, and a toolbar with the following icons:



To **view a report**, click its name in the list, or click its **View** icon.

DELTA Water and Sanitation Project

Project Management

Activity Plan & Budget Funds Disbursement Project Timeline **Project Reports** Staff Reports

Project Performance by Activity

Expand All Collapse All Excel Export PDF Export

	Global		
	% of Target	% of Budget	Variance
G: Reduce death and illness related to Water and Sanitation related diseases in the targeted communities	203.90%	193.64%	
O1: Improved access to and use of sustainable sources of safe water in target communities	280.92%	220.38%	
O11: Community water points constructed or rehabilitated	251.25%	207.63%	
A11A: Construction of water points to national standard	185.68%	190.44%	-317
A11B: Rehabilitation of water handpumps to national standard	316.83%	316.83%	-657
O12: Community management of water points is improved	310.58%	275.31%	
A12A: Establishment of communities with a WatSan committee	279.17%	279.17%	-430
A12B: Training of technicians of WatSan committees	187.05%	187.05%	-121

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Note the position in the table layout of the items selected in the example: the Log Frame at left from Page 7 / 13

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the Rows pick list, the column headers based on Period, and the selected fields. The Rows and Display By selections are essentially a way to disaggregate your BI data.

Table reports by default initially display data at the highest level available for the selected item. Delta's BI reports allow users to further drill down into table data by simply double-clicking on the Display By header in the table. In our example, the Period (Display By) shows Global at the top, the highest level of data. Double-clicking on Global expands the data into years.

	2015			2016			
	% of Target	% of Budget	Variance	% of Target	% of Budget	Variance	% of
	65.85%	65.67%		69.02%	69.12%		71
	66.96%	65.93%		68.97%	67.77%		61
	68.50%	67.19%		70.53%	68.51%		71
	66.10%	66.10%	80	67.11%	67.11%	98	71
	70.89%	70.89%	108	73.96%	73.96%	106	71
	65.42%	62.17%		67.40%	65.44%		61
	59.06%	59.06%	113	63.46%	63.46%	114	61
	65.22%	65.22%	32	66.67%	66.67%	38	61

Double-clicking on a year expands it into its individual periods.



Water and Sanitation Project

Project Management

Activity Plan & BudgetFunds DisbursementProject TimelineProject ReportsStaff Reports

Project Performance by Activity

Expand AllCollapse AllExcel ExportPDF Export

	Mar 31, 2016			Jun 30, 2016			
	% of Target	% of Budget	Variance	% of Target	% of Budget	Variance	% of
▼ G: Reduce death and illness related to Water and Sanitation related diseases in the targeted communities	68.76%	69.01%		68.04%	67.84%		
▼ O1: Improved access to and use of sustainable sources of safe water in target communities	69.07%	68.14%		69.59%	66.98%		
▼ O11: Community water points constructed or rehabilitated	70.13%	68.63%		70.85%	67.28%		
A11A: Construction of water points to national standard	67.53%	67.53%	25	65.00%	65.00%	28	
A11B: Rehabilitation of water handpumps to national standard	72.73%	72.73%	30	76.70%	76.70%	24	
▼ O12: Community management of water points is improved	68.01%	66.53%		68.33%	65.92%		
A12A: Establishment of communities with a WatSan committee	65.48%	65.48%	29	62.86%	62.86%	26	
A12B: Training of technicians of WatSan committees	66.67%	66.67%	9	68.97%	68.97%	9	

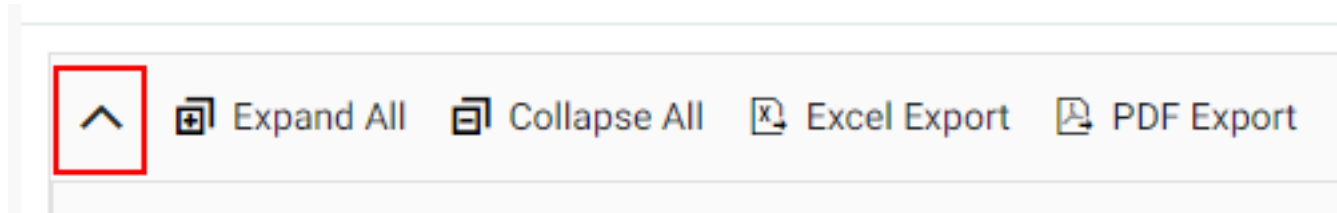
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To return to higher levels from a drilldown, click the caret at top left next to the Expand button to

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"zoom out" of the data, eventually returning to the highest level view.



IMPORTANT: in the particular case of Periods in the example above, the Global level for Period appears because when the project was created, it was set up to have three levels of planning in the project definition's [M&E Settings](#) tab. For a project which is set up with two levels of planning, the top level for Period will be Annual (years), and only one drilldown will be available, down to individual periods. The period lengths are also set in the M&E Settings tab of the project.

Click the X at top right to close the report and return to the Reports list screen.

To **edit a report**, click the Edit icon in its toolbar. Make the desired changes to the report parameters, and click the checkmark in the Custom Reports - Table popup window title bar to save your work and return to the Reports list screen.

For our example, we'll change the Display By selection from Periods to Locations. This will break down project performance data by geographical location. Note that the highest level of (Display By) Locations appears as the top header, in this case the Country.

K: Kenya		
% of Target	% of Budget	Variance
207.26%	209.07%	
291.00%	252.20%	
271.43%	246.03%	
226.03%	232.87%	-397
316.83%	316.83%	-657
310.58%	275.31%	

Double-clicking on the header drills down through the geography levels assigned to the [Locations](#) list in the Portfolio Settings module. The number of available drilldowns depends on the number of geography levels. Navigate out of the drilldowns by using the caret at top left as described above.

Note that the left pane (the Rows) scrolls independently from the rest of the table. You can also resize the two parts of the table by moving your cursor over the top of the vertical dividing line until the Resize cursor appears. Click, hold, and drag to resize the left pane. You can also resize each

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individual column in the right side of the table by clicking, holding and dragging the cell dividers. These are temporary settings, and will be reset when you close the report.

Table reports support the use of filters. Click the report's Edit icon, and click the **Filters** tab in the Custom Reports - Table popup window.

Custom Reports - Table

Description

Settings

Filters

Filters

Field*

Responsible Entity

Operation*

Equal

Value *

+ Add

Select the field you wish to use as the basis for the filter. **NOTE:** the contents of this pick list will depend on which selections you made in the Rows and Display By pick lists.

Field*

Value *

Responsible Entity

Responsible Entity

Year

Financing Source Code

Budget Category

Select the operation you want the filter to perform, and the value of the filter. In this example, we're going to filter for data for the year 2016, where the Field is 'Year', the Operation is 'Equal', and the Value is '2016'.

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Custom Reports - Table



Description

Settings

Filters

Filters

Field*

Year

Operation*

Equal

Value *

2016

+ Add

Click the +Add button when you're done to save your filter. The Filters form will reset to blank, and your new filter will appear at the bottom of the screen.

Custom Reports - Table



Description

Settings

Filters

Filters

Field*

Responsible Entity

Operation*

Equal

Value *

+ Add

1 Year Equal 2016



Click the checkmark in the Custom Reports - Table popup window title bar to save your work and return to the Reports list screen. Open the report to view the filtered data.

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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.

Custom Reports - Table

Description

Settings

Filters

Chaining filters AND / OR *

1 OR 2

Filters

Field*

Responsible Entity

Operation*

Equal

Value *

+ Add

1

Year Equal 2016

2

Year Equal 2017

You can also use parentheses to group logical operations. In an instance with three filters, for example, 1 AND 2 OR 3 is parsed in the order in which it is written; but in 1 AND (2 OR 3), the contents of the parentheses are parsed first.

To remove a filter, click its Delete icon. There is currently no way by which a user can edit a filter, but they take very little time to set up, so replacing a faulty filter is easy.

While you're viewing a report, you can **export** it in Excel (.xlsx) or PDF (.pdf) format by clicking on either option at top left of the table.

^

Expand All

Collapse All

Excel Export

PDF Export

The **Share** icon in the report's toolbar allows users to input notes, comments, media, or other

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information about the report with specified recipients.

Share Comments

Comments

Share with



B

U



Roboto

A



















?

This is a comment on this custom report.

✓ OK

Note the three parallel lines at the bottom of the comment input box. Click, hold, and drag the lines to increase the height of the comment input box.

As you start to input content into the comments box, the Share With button appears. When you're done with your comment, click the Share With button to select recipients. Click OK when you're done. The selected persons will receive a notification in the form of a dot on top of their [Alerts](#) icon in the project's main toolbar.

⁽¹⁾ In earlier versions of Delta, these custom activity reports were located in the Analytics module.

Previous: [PM: Project Timeline \(Gantt Chart\)](#) | Next: [PM: Project Reports: Pie Chart Reports](#)

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