

Project Management

PM: Activity Plan & Budget (APB)

The **Activity Planning & Budget (APB)** screen is the planning and monitoring tool that's generally used for annual planning and follow-up of a programme. The APB is usually prepared by the programme managers and approved in a workflow which involves steering and monitoring bodies as well as technical and financial partners. Activities are planned as [described](#) on the basis of the APB.

After activities have been planned, and/or actuals data associated with these activities has been entered into the system, users can call up this screen to view and follow the status of the APB.

Water and Sanitation Project

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All locations Plan (Initial) Display Funding sources All (*)

Activities	Unit	Target	Actual	%	Budget (\$ US)	Cost (\$ US)	%
A11A: Construction of water points to national standard	U	236	156	66%	1,888,000	1,248,000	66%
A11B: Rehabilitation of water handpumps to national standard	Nbre	371	263	71%	556,500	394,500	71%
A11C: Example: New Activity							
A12A: Establishment of communities with a WatSan committee	Nbre	276	163	59%	552,000	326,000	59%
A12B: Training of technicians of WatSan committees	Nbre	92	60	65%	138,000	90,000	65%
A12C: Collection of adequate charges by WatSan committees to maintain the water points	Nbre	132	95	72%	132,000	95,000	72%
A21A: Construction of functioning household latrines	Nbre	565	371	66%	102,830	67,522	66%
A22A: Construction of demonstration toilets	Nbre	144	101	70%	12,960	9,090	70%
A22B: Sessions of awareness on use of latrines	Nbre	145	85	59%	145,000	85,000	59%

Currently Connected: 1 User

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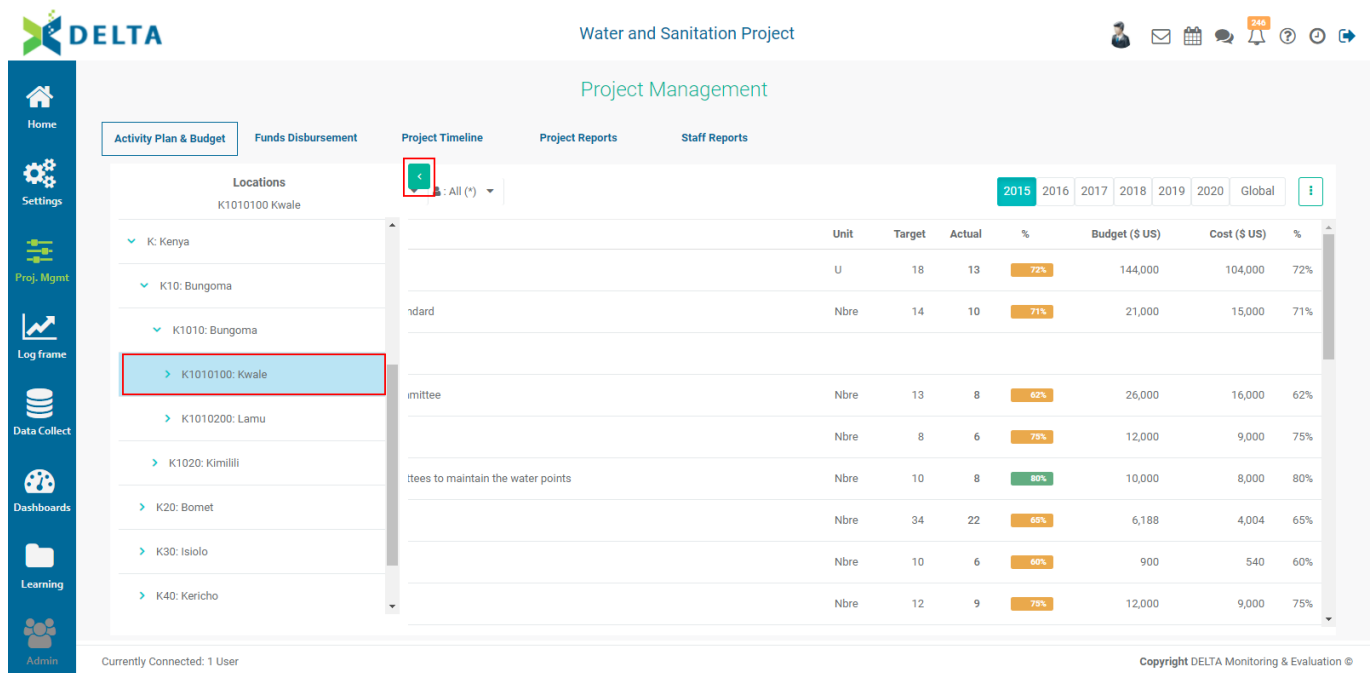
The basis for the APB is the **Locations** list. Click the >> button to expand the Locations list onto the screen.

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

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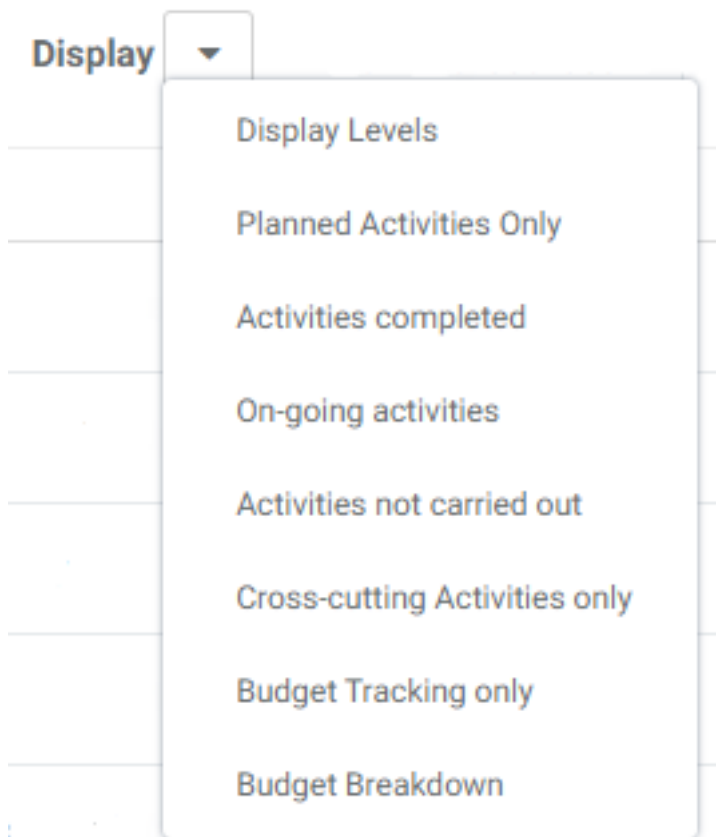
To expand and collapse the branches of the Locations list, click the carets (> and v) to the left of each level. Click on a location to select it and view its specific information. Click the Hide (<) button to hide the geography list.

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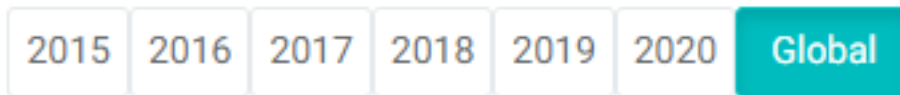
The data can be further filtered by various criteria: by Plan (initial vs. revised), by Display type, by Funding Source, and/or by Stakeholder. Filters can be combined simply by choosing criteria under each individual filter.

The Display options are extensive and include type of activity as well as activity status and budget tracking or breakdown. It is especially useful to sort out cross-cutting activities used by the project.



The default timeline view for this dashboard is **Global**.

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Click on a year to view its data.



To see the details of a given period, double-click on a year to expand its data. Click on each of the period tabs to view its data. Click on the year tab to return to the previous screen. **NOTE:** Any filters or views already applied will also be applied to the year and period views.

DELTA Water and Sanitation Project

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

K: Kenya Plan (Initial) Display Funding sources All (*)

Quarter 1 Quarter 2 Quarter 3 Quarter 4 2017 ^

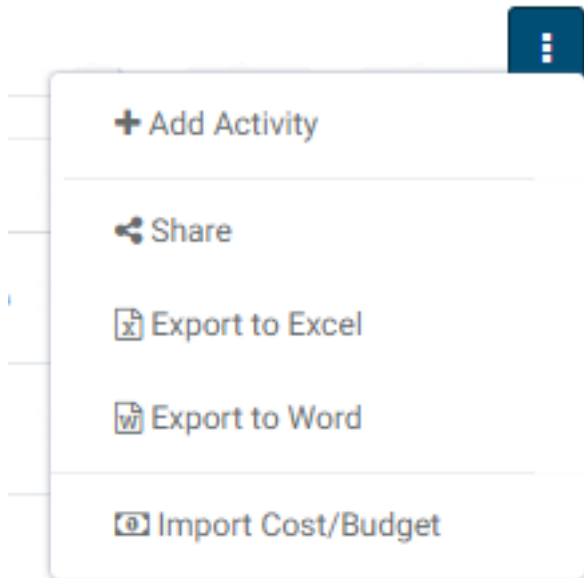
Activities	Unit	Target	Actual	%	Budget (\$ US)	Cost (\$ US)	%
A11A: Construction of water points to national standard	U	95	70	74%	760,000	560,000	74%
A11B: Rehabilitation of water handpumps to national standard	Nbre	100	73	73%	150,000	109,500	73%
A11C: Example: New Activity							
A12A: Establishment of communities with a WatSan committee	Nbre	71	42	59%	142,000	84,000	59%
A12B: Training of technicians of WatSan committees	Nbre	28	17	61%	42,000	25,500	61%
A12C: Collection of adequate charges by WatSan committees to maintain the water points	Nbre	36	24	67%	36,000	24,000	67%
A21A: Construction of functioning household latrines	Nbre	171	125	73%	31,122	22,750	73%
A22A: Construction of demonstration toilets	Nbre	40	28	70%	3,600	2,520	70%
A22B: Sessions of awareness on use of latrines	Nbre	40	25	63%	40,000	25,000	63%

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The vertical More icon to the right of the timeline bar contains additional functions which can be performed from this screen:

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Click **+Add Activity** to create a new activity for the project. This process is described in detail in this article: [PM: Activities: Creating a New Activity](#).

Select **Share** to send this dashboard to selected recipients in the Chatroom.

To **export this dashboard**, select Export to Excel or Export to Word.

To **import activity costs and budgets** for the project, select Import Cost/Budget, navigate to the Excel spreadsheet you want to use to select it, and click Open or press Enter on your keyboard. The system will briefly display a status icon while the import takes place. **NOTE:** this step should only be performed after all activities have been configured. The cost and budget spreadsheet **must** contain the following columns: **Activity Code**, **Location Code**, **Date**, **Budget**, and **Costs**. The date allows the system to place the budget item in the proper period for each location and activity.

IMPORTANT: Budgets and costs can be imported more than once, but you need to be careful; any import subsequent to the first one will overwrite existing data if the spreadsheet contains identical codes and dates. In the example below, costs have not yet been determined and are left blank.

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	A	B	C	D	E
1	Activity Code	Location Code	Date	Budget	Costs
2	ACT01	U01	10/31/20	1000	
3	ACT01	U02	10/31/20	500	
4	ACT01	U03	10/31/20	800	
5	ACT01	U04	10/31/20	750	
6	ACT01	U05	10/31/20	1200	
7	ACT01	U06	10/31/20	275	
8	ACT01	U07	10/31/20	625	
9	ACT02	U01	12/30/20	900	
10	ACT02	U02	12/30/20	1000	
11	ACT02	U03	12/30/20	250	
12	ACT02	U04	12/30/20	750	
13	ACT02	U05	12/30/20	550	
14	ACT02	U06	12/30/20	1200	
15	ACT02	U07	12/30/20	350	
16					

Previous: [PM: Activities: Creating a New Activity](#) | Next: [PM: Funds Disbursement](#)

Unique solution ID: #1010

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