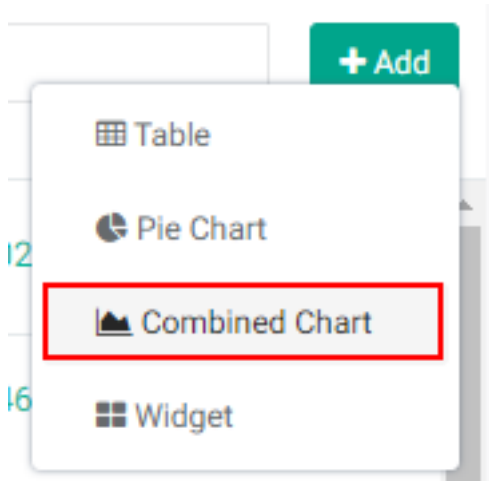


Project Management

PM: Project Reports: Combined Chart Reports

The third type of Activity Custom Report is **Combined Chart**. This type of report allows you to graph series side-by-side.

From the Project Management module, select the **Reports** tab, then click the +Add button at top right to bring up the menu, and select Combined Chart.



The Custom Report - Combined Chart popup window will open.

Custom Reports - Combined Chart ✓ ✗

Report Title *

☒ **Public** ☐ **Save in Dashboards** ☐ **Portfolio**

Based on *

Log Frame ▼

Field *

% of Target ▼

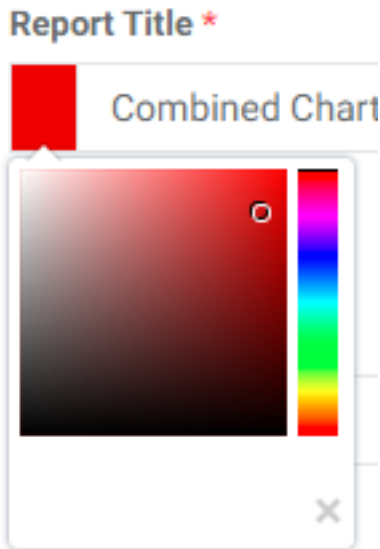
Series

Enter a **title** for the report. This will enable the Series + button at the bottom of the popup window. If desired, change the default color for the report icon by clicking on the color block to the left of the

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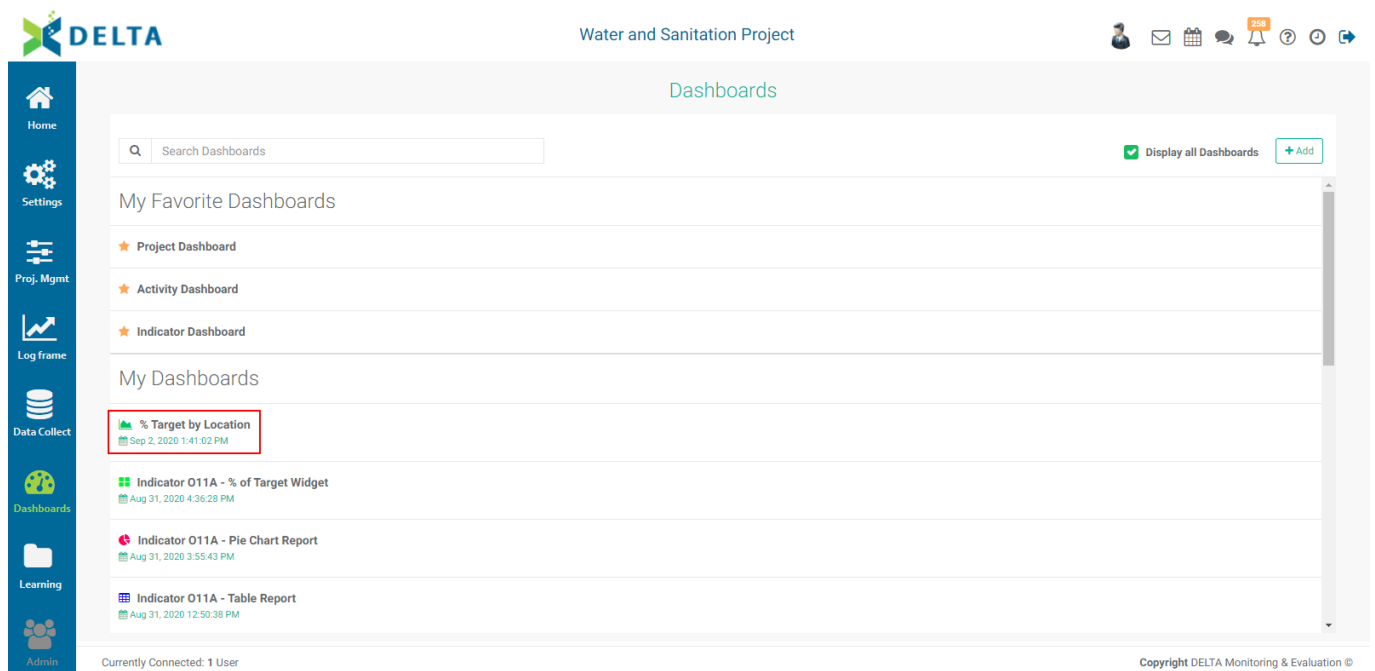
Project Management

Report Title box to bring up the color picker.



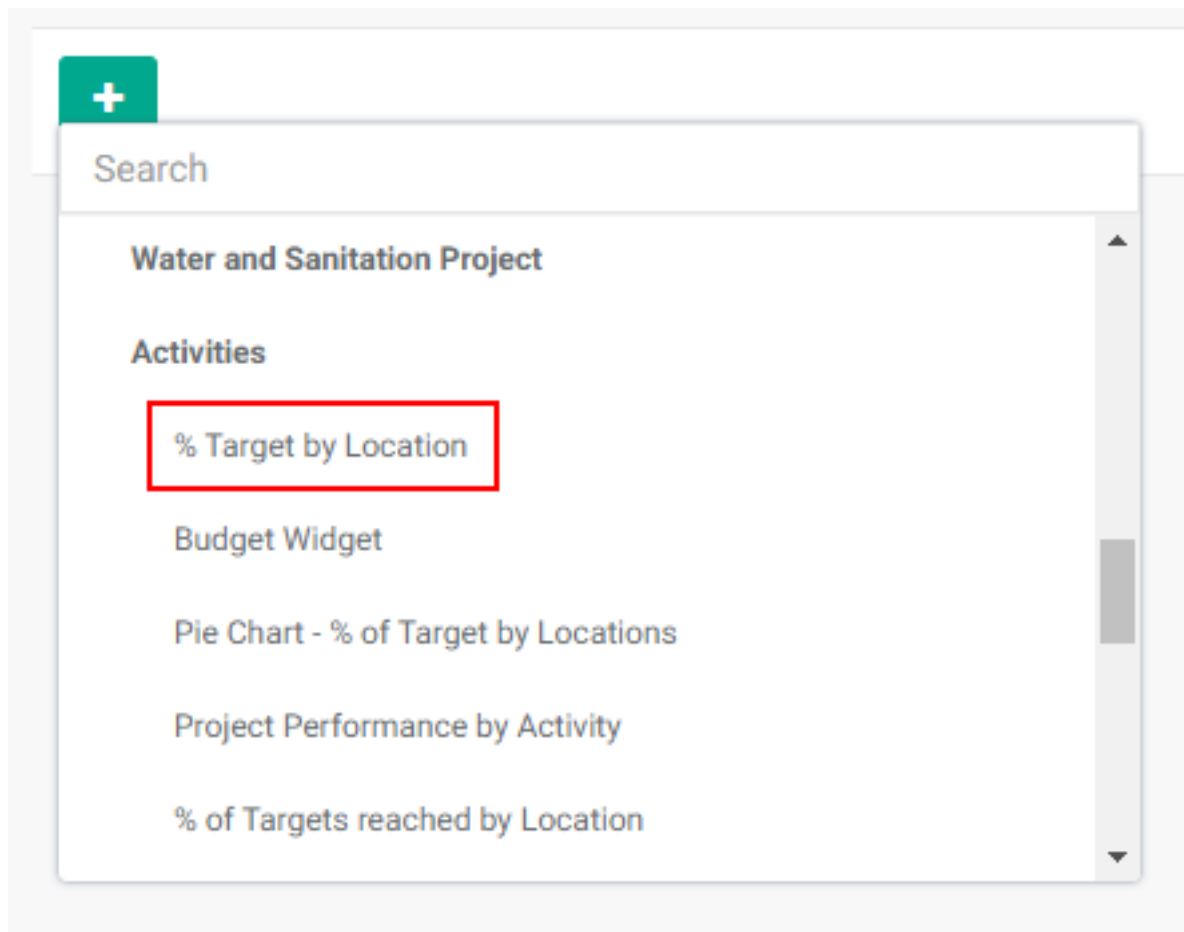
Checking the **Public** box makes this report available to anyone. The Public option throughout Delta publishes selected project information to the Portal - the Delta login page - for access by anyone with the URL to the portal, without the need for system access credentials. This functionality is described 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.



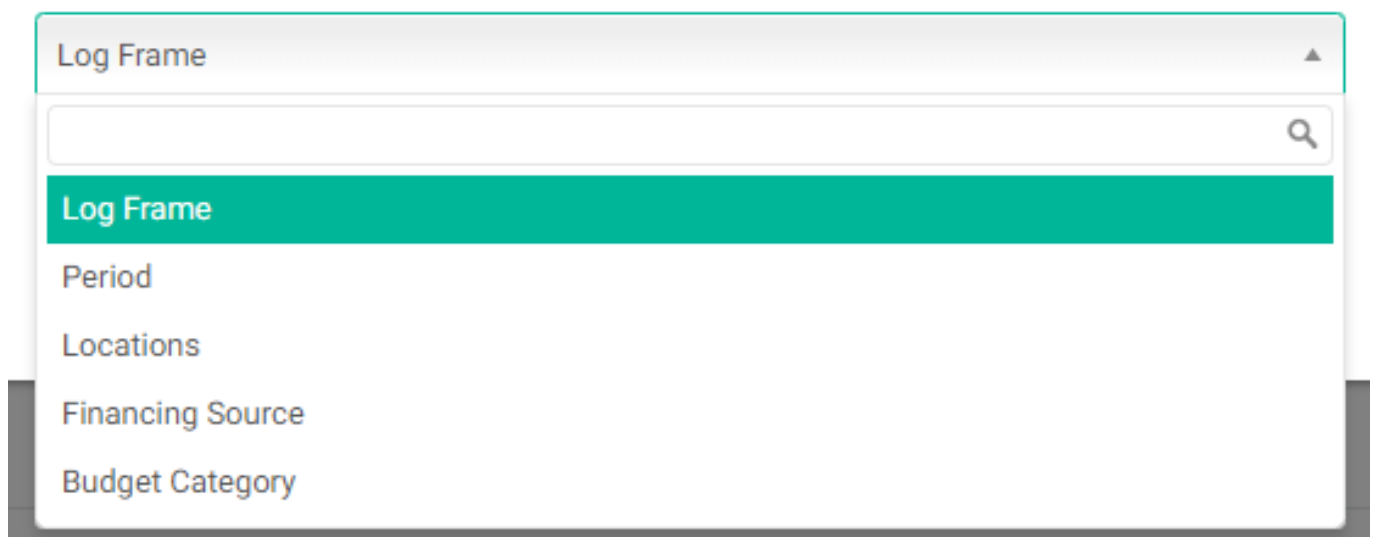
Checking the **Portfolio** box will make this report available at the Portfolio level. The reports' names appear in the Portfolio Dashboard pick list, sorted by project and type (Activities, Indicators, Forms), and can then be used for multiproject dashboards. **NOTE:** all project reports are automatically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

Project Management



Select the basis for the combined graph from the **Based On** pick list. The options are **Log Frame**, **Period**, **Locations**, **Financing Sources**, and **Budget Category**.

Based on *



Select the field you want to graph from the **Field** pick list.

Project Management

Field *

% of Target

Q

% of Target

Budget

Actual cost

Budget Variance

% of Budget

Click the + button next to **Series** to add a series. In this example, we are going to breakdown '% of Target' by Location and by Year, the latter using series.

Custom Reports - Combined Chart - Series



1 Parameters

2 Filters

Report Title *

% Target by Location - 2016

Type Representation *

Bar Chart

Color:



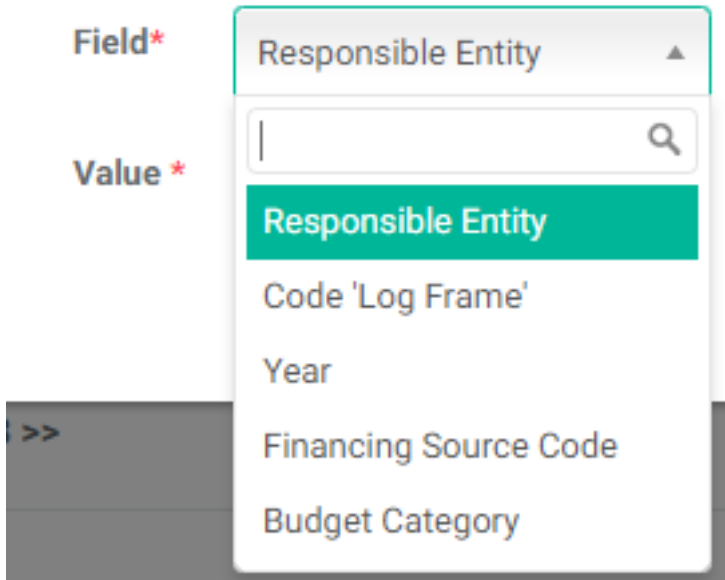
Fill

The **Report Title** in this context is the title for the series. **Type Representation** are the graphing options: Line Chart and Bar Chart. The **Fill** checkbox toggles whether the space under a line graph or the bars in a bar graph are filled with the selected color.

When you enter the series title, the **Filters** tab is enabled. The Filters functionality is similar to that available in other custom reports in Delta, except that in Combined Charts, filters **must** be used to create the data subsets you wish to graph side-by-side. Click the Filters tab to enter the tab, then click + to add a new filter.

Select the field you want to filter on. The options are **Responsible Entity**, **Log Frame Code**, **Year**, **Financing Source Code**, and **Budget Category**.

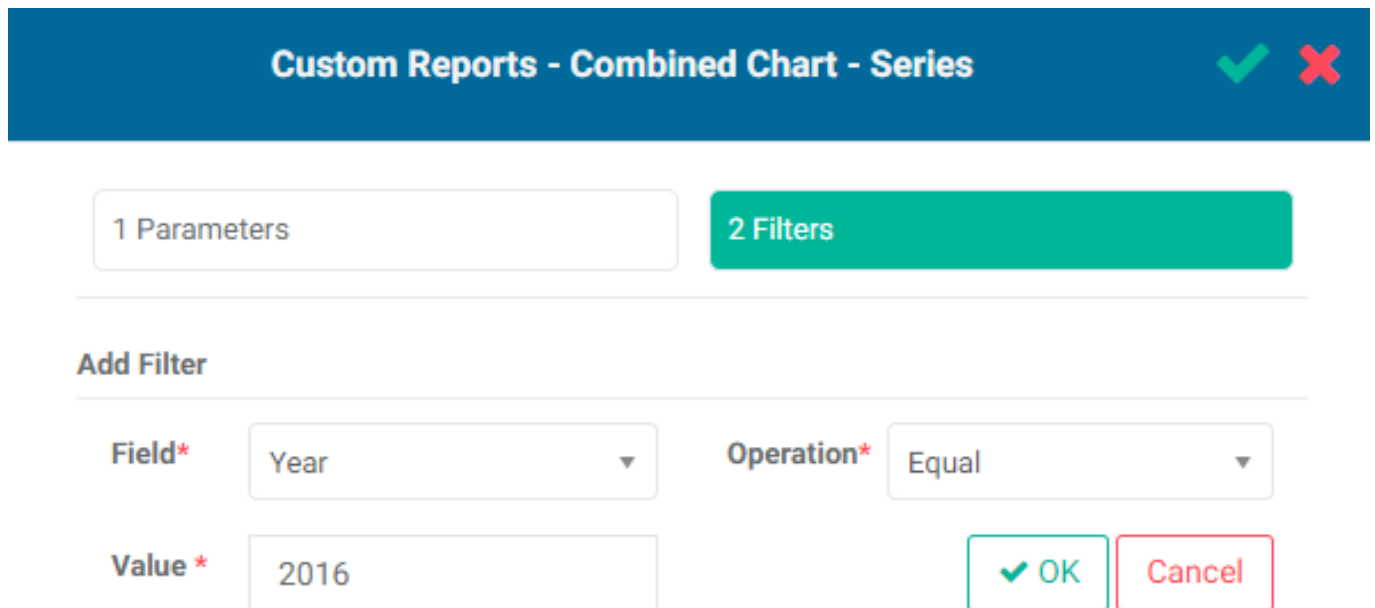
Project Management



A screenshot of a web form. On the left, there are labels 'Field*' and 'Value *'. To the right, a dropdown menu is open, showing a list of options: 'Responsible Entity' (highlighted in green), 'Code 'Log Frame'', 'Year', 'Financing Source Code', and 'Budget Category'. The dropdown has a search icon in the top right corner.

The Log Frame Code allows a user to pinpoint an exact element of the log frame for the report. The code is used instead of the element name to keep things short.

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'.



A screenshot of a web interface for configuring filters. At the top, a blue header bar contains the text 'Custom Reports - Combined Chart - Series' and two icons: a green checkmark and a red X. Below the header, there are two buttons: '1 Parameters' and '2 Filters'. The '2 Filters' button is highlighted in green. Below these buttons, there is a section titled 'Add Filter'. This section contains three input fields: 'Field*' with a dropdown menu showing 'Year', 'Operation*' with a dropdown menu showing 'Equal', and 'Value *' with a text input field containing '2016'. To the right of the 'Value *' field are two buttons: 'OK' (with a green checkmark icon) and 'Cancel' (with a red X icon).

Click OK when you're done to save your filter. The new filter will appear at the bottom of the popup window.

Project Management

Custom Reports - Combined Chart - Series



1 Parameters

2 Filters

Add Filter



1 Year Equal 2016



Click the checkmark in the popup window to save this series and return to the Combined Chart popup window. The series will appear at the bottom of the window. The color of the icon is that of the color you selected for the bar or line graph.

Custom Reports - Combined Chart



Report Title *



% Target by Location



Public



Save in Dashboards



Portfolio

Based on *

Locations



Field *

% of Target



Series



% Target by Location - 2016



Project Management

When using filters for a series, 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 AND 2, so both conditions 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.

In this example, the filters will only return data from Activity A11A for 2017.

Custom Reports - Combined Chart - Series

1 Parameters

2 Filters

Chaining filters AND / OR *

1 AND 2

Add Filter

+

1

Year Equal 2017

2

Code 'Log Frame' Equal A11A

Add as many series as needed for the combined graph.

Project Management

Custom Reports - Combined Chart



Report Title *

 % Target by Location

☒ Public

☒ Save in Dashboards

☐ Portfolio

Based on *

Locations ▼

Field *

% of Target ▼

Series

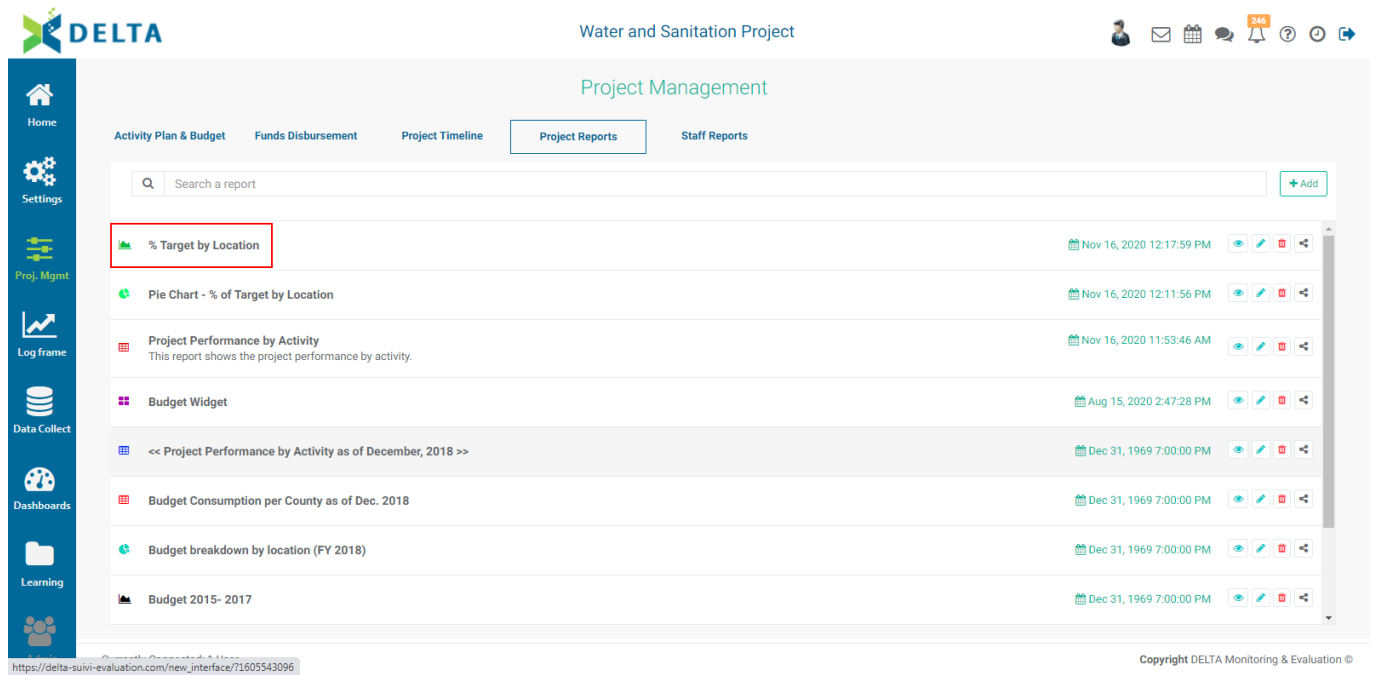


	% Target by Location - 2016		
	% Target by Location - 2017		
	% Target by Location - 2018		
	% Target by Location - 2019		

To **edit a series**, click its Edit icon and make your changes. To **delete a series**, click its Delete icon.

When you've added all the series you need, click the checkmark in the title bar of the Combined Chart popup window to save your work and return to the Reports screen. The new report will appear at the top of the list.

Project Management



Project Management

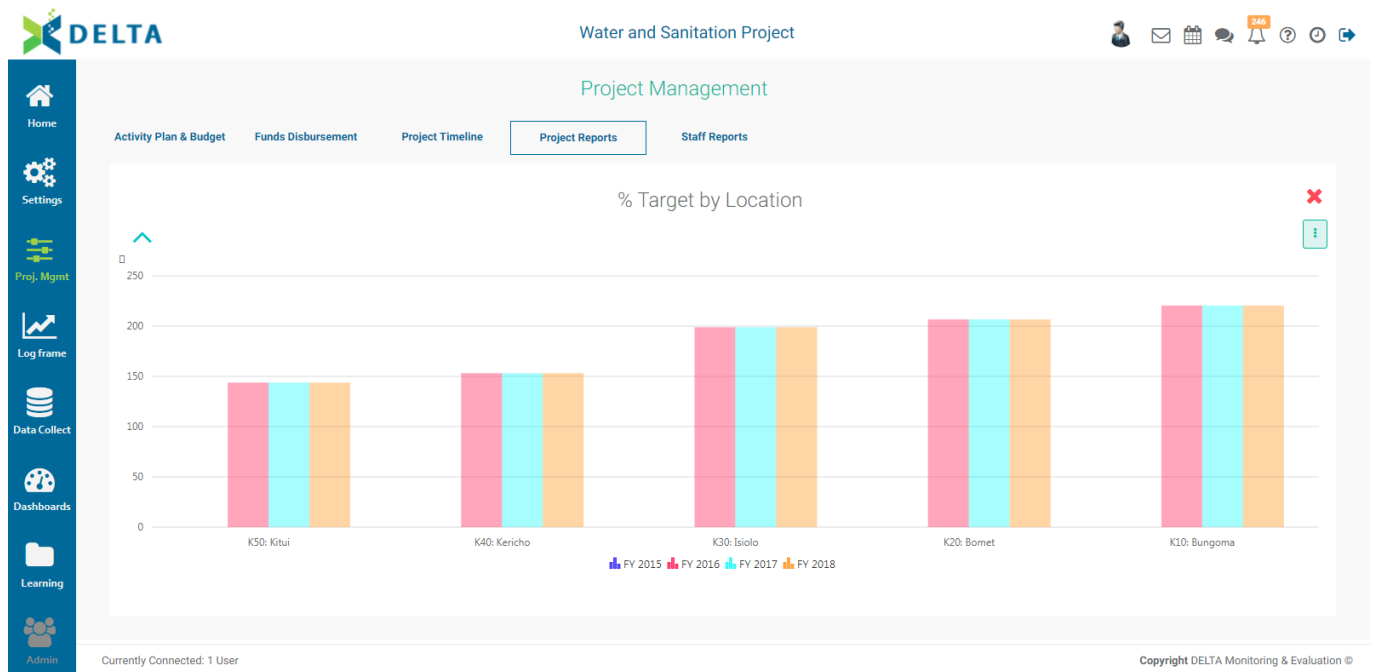
Activity Plan & Budget Funds Disbursement Project Timeline **Project Reports** Staff Reports

Search a report + Add

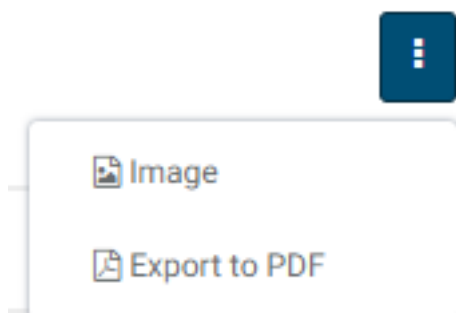
Report Name	Last Updated	View Icon	Edit Icon	Delete Icon	Share Icon
% Target by Location	Nov 16, 2020 12:17:59 PM	✓	✎	✖	🔗
Pie Chart - % of Target by Location	Nov 16, 2020 12:11:56 PM	✓	✎	✖	🔗
Project Performance by Activity This report shows the project performance by activity.	Nov 16, 2020 11:53:46 AM	✓	✎	✖	🔗
Budget Widget	Aug 15, 2020 2:47:28 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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To **view the report**, click its name in the list, or the View icon in its toolbar.



To **export the report**, open it, then click the vertical More icon at top right. The format options are Image (.png format) and PDF.



Project Management

To **share a report**, click its Share icon from the Reports list screen. Enter a comment, and select the recipients.

To **delete a report**, click its Delete icon.

Previous: [PM: Project Reports: Pie Chart Reports](#) | Next: [PM: Project Reports: Widgets](#)

Unique solution ID: #1109

Author: n/a

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