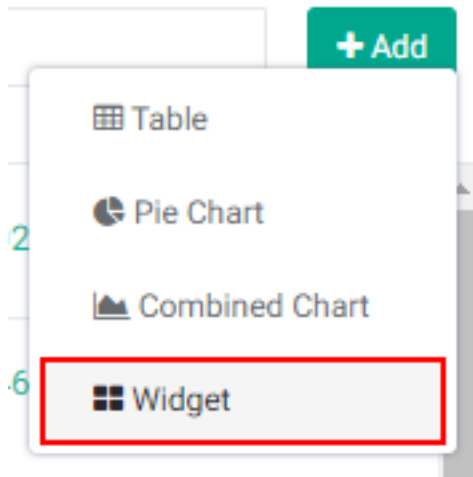


Project Management

PM: Project Reports: Widgets

The fourth and last type of Activity Custom Report is **Widget**. Widgets contain a single data element. From the Project Management module, click the Reports tab, then click the +Add button at top right, and select Widget from the menu.



The Custom Report - Widget popup window will open.

Custom Reports - Widget ✕

1 Parameters

2 Filters

Report Title *

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

Field *

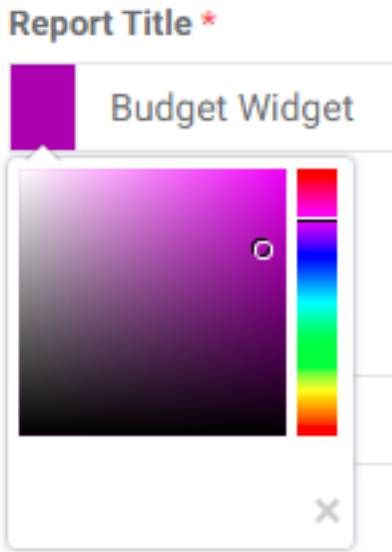
% of Target ▼

✓ OK

Project Management

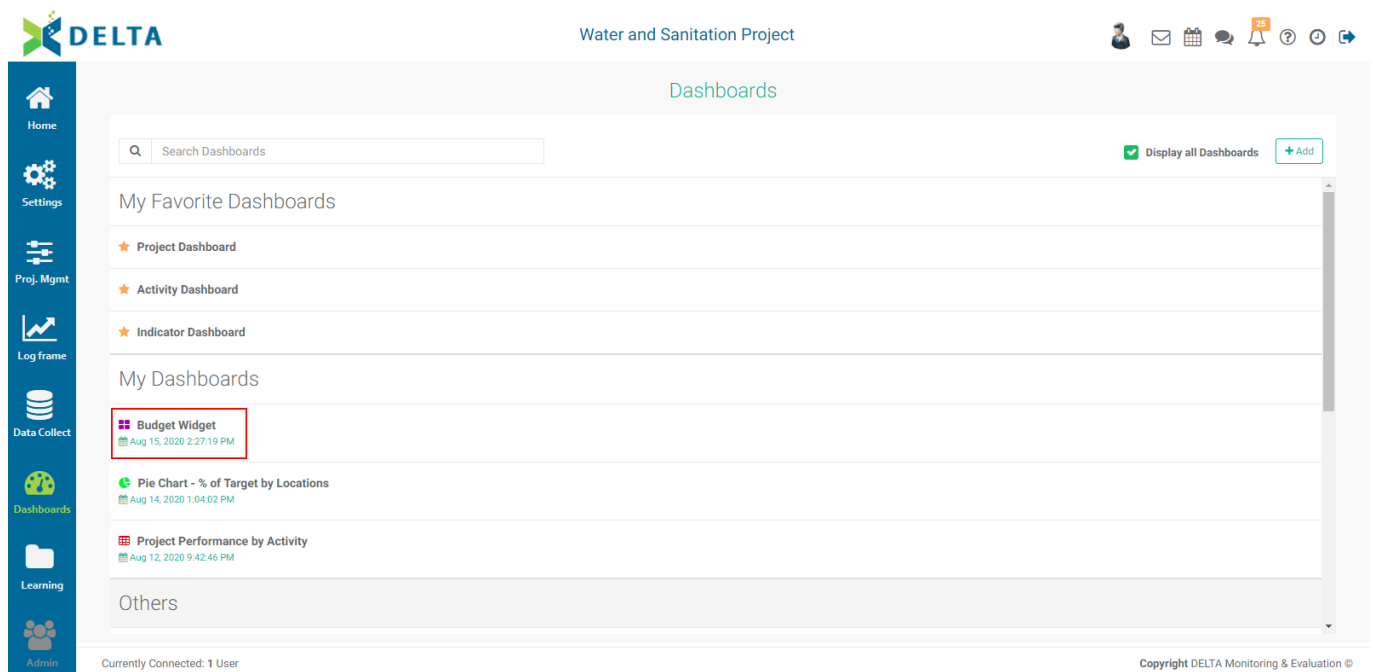
Enter a name for the report in the **Report Title** field.

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



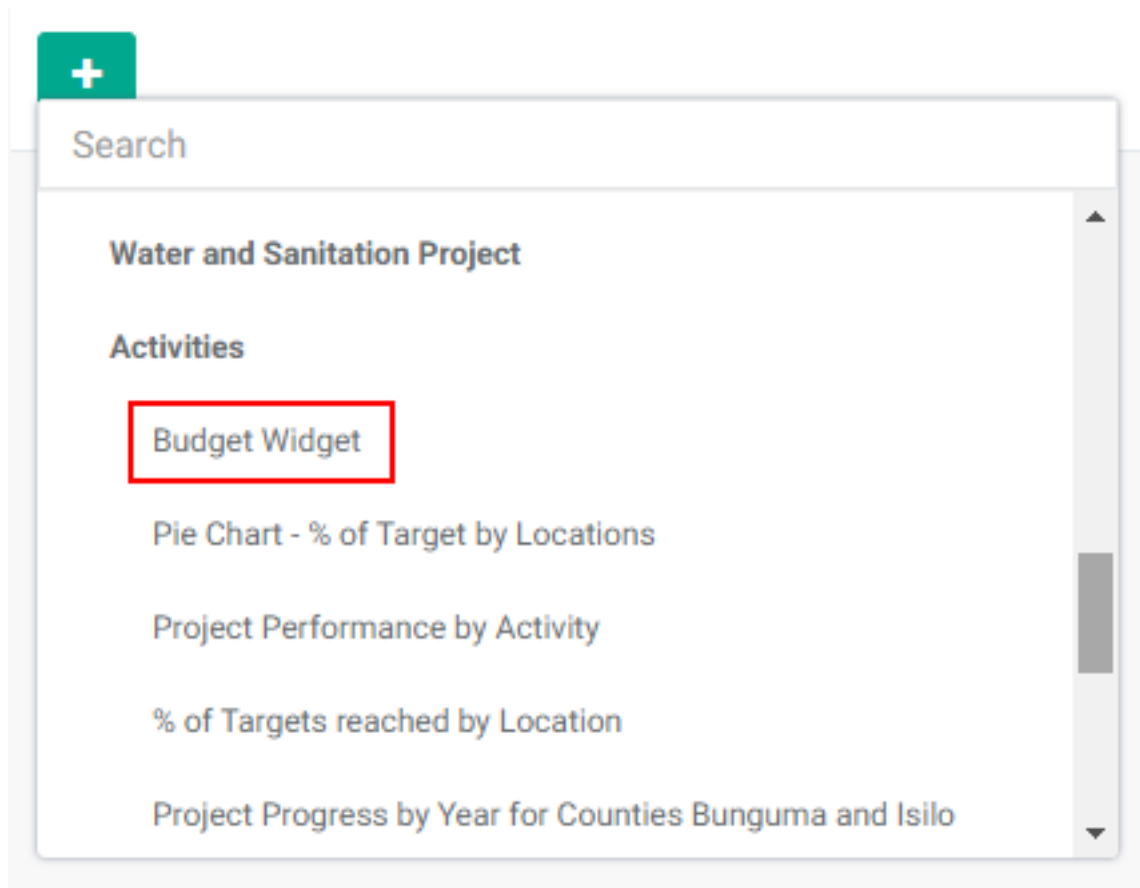
Checking the **Public** box makes this report available to anyone. The Public option throughout Delta publishes selected project information to the Portal - the Delta login page - for access by anyone with the URL to the portal. This functionality is described in detail in [Accessing Delta: Delta's Public 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 single data point you want the widget to display from the **Field** menu.

Project Management

Custom Reports - Widget



1 Parameters

2 Filters

Report Title *

Budget Widget



Public



Save in Dashboards



Portfolio

Field *

% of Target

% of Target

Budget

Actual cost

Budget Variance

% of Budget

Click OK to save your work and return to the Reports tab of the Project Management module. The new report will appear at the top of the list.

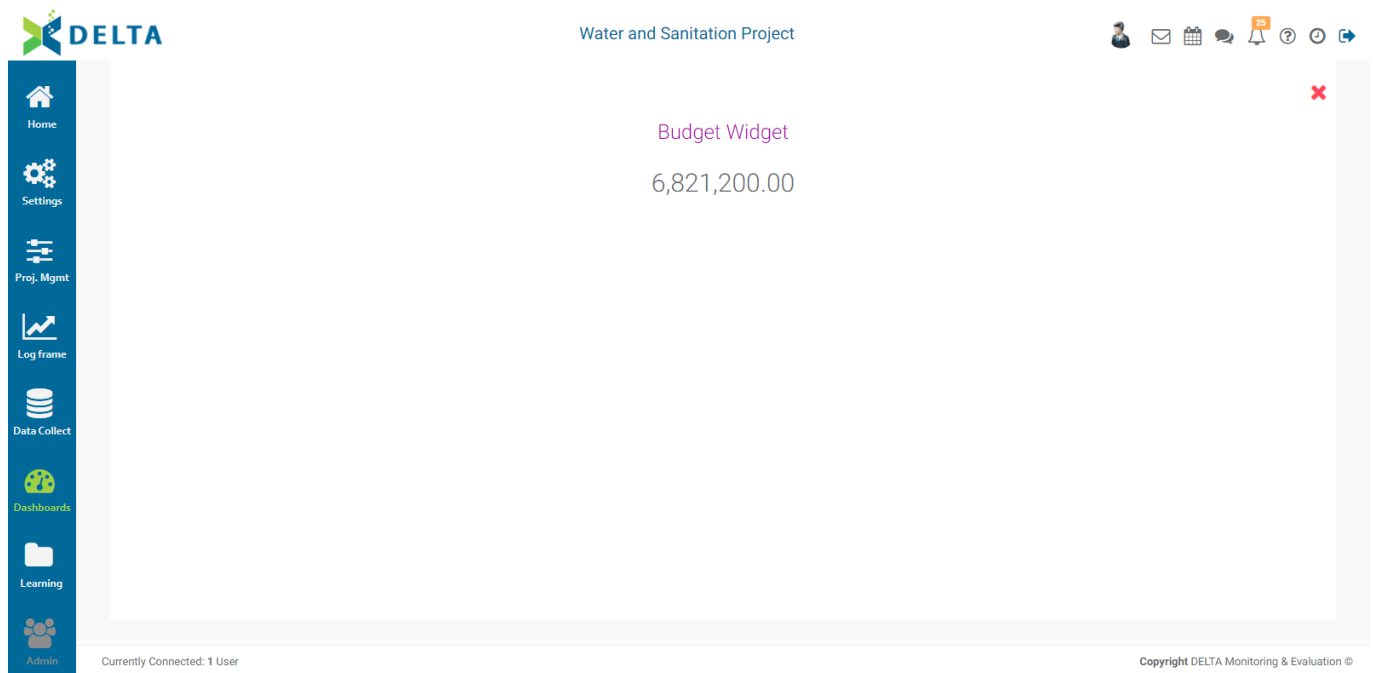
The screenshot shows the Delta Project Management interface. The top navigation bar includes the Delta logo, the project name 'Water and Sanitation Project', and various utility icons. The left sidebar contains navigation links for Home, Settings, Proj. Mgmt, Log frame, Data Collect, Dashboards, Learning, and Admin. The main content area is titled 'Project Management' and has tabs for 'Activity Plan & Budget', 'Funds Disbursement', 'Project Timeline', and 'Reports'. The 'Reports' tab is active, displaying a list of reports. The first report, 'Budget Widget', is highlighted with a red box. Other reports include 'Pie Chart - % of Target by Locations', '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', and 'Project Progress by Year for Counties Bunguma and Isilo'. Each report entry shows a date and time, and icons for viewing, editing, deleting, and sharing. At the bottom, it indicates 'Currently Connected: 1 User' and 'Copyright DELTA Monitoring & Evaluation ©'.

Project Management

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



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



Widgets by themselves don't look like much, but they are useful building blocks for custom dashboards and allow users to set up at-a-glance visual references to important data points.

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

Widgets support the use of filters. Click the report's Edit icon, and click the **Filters** tab in the Custom Reports - Widget popup window, then click the + button next to **Add Filter**.

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

Project Management

Field* Responsible Entity ▲

Value *

Responsible Entity

Location Code

Code 'Log Frame'

Year

Financing Source Code

Budget Category

The Location Code allows filtering for a single element of the Locations list, regardless of level

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'.

Custom Reports - Widget ✕

1 Parameters 2 Filters

Add Filter

Field* Year ▼

Operation* Equal ▼

Value * 2016

✓ OK Cancel

✓ OK

Project Management

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

Custom Reports - Widget

1 Parameters

2 Filters

Add Filter

1 Year Equal 2016

✓ OK

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

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.

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 an incorrect filter is easy.

There is no export functionality for widgets.

The **Share** icon in the report's toolbar allows users to input notes, comments, media, or other information about the report with specified recipients.

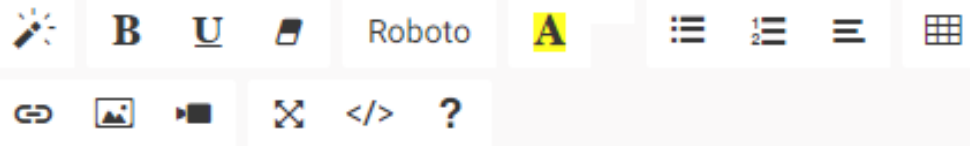
Project Management

Share Comments



Comments

Share with



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.

Previous: [PM: Project Reports: Combined Chart Report](#) | Next: [PM: Staff Reports](#)

Unique solution ID: #1110

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