

Project Management

PM: Activities: Creating a New Activity

Adding activities can be done at both the Portfolio and the Project level. A critical difference between the two is that **cross-cutting** activities can **only** be created at the **Portfolio** level. For more details, read [PM: Activities: Cross-Cutting Activities](#).

To add an activity from the Portfolio level, go to the Portfolio page, click on the Project Management icon in the left navigation, make sure you're in the Activity Plan & Budget screen, then click on the More icon at upper right and select +Add Activity.

Project Management



PROJECTS PORTFOLIO



Project Management

Activity Plan & Budget

Funds Disbursement

Project Timeline

Project Reports

Staff Reports

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

2019 2020 2021 2022 2023 Global

Activities	Unit	Target	Actual	%	Budget
IM111G: Strengthened legitimate and participatory local governance structures and the relationship between them in CRP communities	Benef				
IM112G: Increased transparency and accountability in governance					
IM113G: Strengthened community and parish development planning					
IM211S: Improved social skills among target populations					
IM212S: Reduced inter and intra community conflict					
IM213S: Improved quality of service by MDAs to target population					
IM221S: Improved health practices					
IM222S: Increased parenting skills and practices					
IM223S: Reduced intra familial conflict/abuse/violence					

- + Add Activity
- Share
- Export to Excel
- Export to Word
- Import Cost/Budget

Currently Connected: 1 User

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The Activity Details screen will open.

The screenshot shows the 'Activity Details' screen in the Delta Projects Portfolio application. The interface includes a top navigation bar with the Delta logo, 'PROJECTS PORTFOLIO' text, and user profile, email, calendar, chat, and notification icons. A left sidebar contains navigation links: Home, Settings, Proj. Mgmt, Log frame, Data Collect, and Dashboards. The main form area contains the following fields:

- Code *** (Length must be equal to 6): Text input with placeholder 'Enter Results code'.
- Name ***: Text input with placeholder 'Enter Results'.
- Start ***: Date input with value '05/06/2019' and a calendar icon.
- End ***: Date input with value '12/01/2023' and a calendar icon.
- Category ***: Dropdown menu with value 'None' and a 'More' icon.
- Unit of measure ***: Dropdown menu with value 'PERCENT: Percent'.
- Unit cost**: Text input with value '0'.
- Entity Responsible ***: Text input with value 'PMT: Viewer'.
- Intermediate Outcomes ***: Text input with value 'IR61Y: Holistic development of children and youth ensured'.
- Comments**: Text area.
- Automatic Calculation**: Toggle switch with options 'Budget' and 'Actual Cost'.
- Cross cutting Activity**: Check box.

An 'OK' button is located at the bottom right of the form.

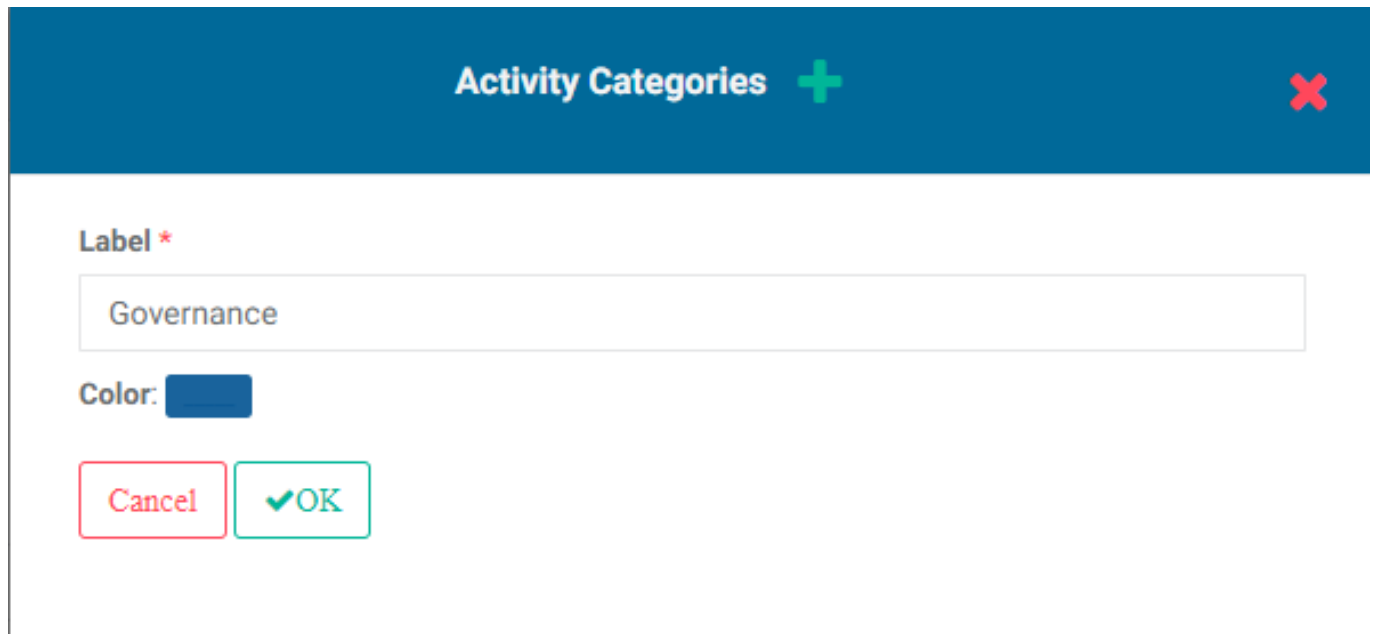
Several fields in this screen get their information from settings entered at the Portfolio level. For example, the length of the code for the activity is determined by the Portfolio log frame. If you're not familiar with its specific information, you can view it in the Settings module at the Portfolio level.

Units of Measure and Entity Responsible are also informed by those settings at the Portfolio level.

To create an activity category, click the More icon at the right of the Category field, click the + in the
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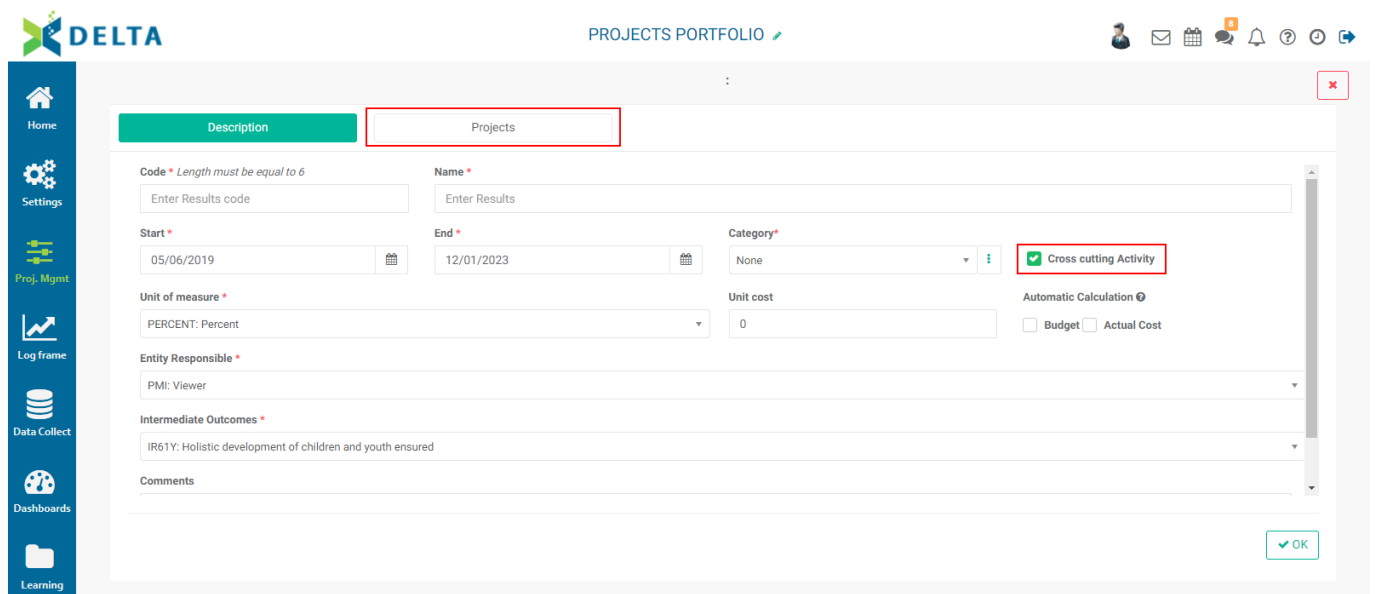
Activity Categories popup window title bar, then enter the required information in the popup window, and click OK to save your work and return to the Activity Categories list.

A screenshot of the 'Activity Categories' popup window. The title bar is blue with the text 'Activity Categories' and a green plus icon on the left, and a red X icon on the right. The main area is white. It contains a 'Label *' field with the text 'Governance'. Below it is a 'Color:' label next to a blue color swatch. At the bottom are two buttons: 'Cancel' (red border) and 'OK' (green border with a checkmark icon).

Click the X in the popup window title bar to return to the activity definition screen without saving.

Make sure you select the correct portfolio log frame level in the field directly beneath the Entity Responsible field. the name of that field will be different from the one used in this example (Intermediate Outcome) because it's based on the level of the log frame immediately above the Activity level, and will therefore be aligned with your nomenclature.

To **specify this activity as a cross-cutting activity**, check the box at upper right. Checking the box will allow you to enter additional information for the activity.

A screenshot of the Delta Projects Portfolio activity definition screen. The top header shows the Delta logo, 'PROJECTS PORTFOLIO', and various icons. A sidebar on the left contains navigation links: Home, Settings, Proj. Mgmt, Log frame, Data Collect, Dashboards, and Learning. The main content area has two tabs: 'Description' (active) and 'Projects' (highlighted with a red box). The 'Description' tab contains several fields: 'Code * Length must be equal to 6' (text input), 'Name *' (text input), 'Start *' (date picker: 05/06/2019), 'End *' (date picker: 12/01/2023), 'Category*' (dropdown: None), 'Unit of measure *' (dropdown: PERCENT: Percent), 'Unit cost' (text input: 0), 'Entity Responsible *' (dropdown: PMi: Viewer), 'Intermediate Outcomes *' (dropdown: IR61Y: Holistic development of children and youth ensured), and 'Comments' (text area). A checkbox labeled 'Cross cutting Activity' is checked and highlighted with a red box. There are also 'Automatic Calculation' options for 'Budget' and 'Actual Cost'. An 'OK' button is at the bottom right.

Click the Projects tab to select the projects this activity should be deployed to.

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The screenshot shows the 'PROJECTS PORTFOLIO' interface. On the left is a vertical sidebar with icons for Home, Settings, Proj. Mgmt, Log frame, Data Collect, Dashboards, and Learning. The main area has two tabs: 'Description' and 'Projects'. The 'Projects' tab is active, displaying a list of projects with checkboxes for selection. The projects listed are: Programme de Mitigation des Conflits Paysans - Éleveurs (PMCPE), Projet de Développement Urbain, Projet de Développement Social, Projet de Développement Rural - Phase 2, Projet de Développement Agricole et de Réhabilitation des Pistes, Water and Sanitation Project, and Projet d'Appui aux Communes. At the bottom right of the list, it says '1 of 12 pages (174 projects)'. There is an 'OK' button at the bottom right of the main area.

Select the desired projects, or click Check All to select all the projects. If you're done, scroll down to the bottom of the screen and click OK to save your work, or return to the Description screen by clicking its tab, and save your work from there by clicking OK.

Cross-cutting activities are described in further detail in [this article](#).

When **creating a project-specific activity** from the Activity Planning & Budget screen, the option for a cross-cutting activity is replaced with a Visible in Portfolio checkbox. Select this box to make the activity visible at the portfolio level.

The screenshot shows the 'Water and Sanitation Project' interface. The left sidebar is the same as in the previous screenshot. The main area is a form for creating an activity. It includes fields for Code (with a note 'Length must be equal to 4'), Name, Start date (01/15/2015), End date (12/31/2020), Category (None), Unit of measure (H: Hours), Unit cost (0), Entity Responsible (AZI: Water and Sanitation Specialist), Outputs (032: Household training on safe hygiene and sanitation provided), and Comments. A checkbox labeled 'Visible in Portfolio' is highlighted with a red box. There is an 'OK' button at the bottom right.

The rest of the process is the same as working with a log frame-generated activity.

NOTE: new activities can also be created from the Log Frame screen of the Settings module, either at the Portfolio or project level. However, to perform any tasks with the new activity, you'll need to do so in the Project Management module.

Previous: [PM: Activities: Cross-Cutting Activities](#) | Next: [PM: Activity Plan & Budget \(APB\)](#)

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