

Project Management

PM: Staff Reports

The **Staff Reports** screen allows you to view and create categories or reports, set the periodicity of a document (for example, an annual report), associate alerts with document deadlines, assign the document to a user, import report templates, and track report assignments.

DELTA Water and Sanitation Project

Project Management

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

Report Planning Report Tracking

Search + Add

Report Category	Periodicity	Assigned To	Actions
Annual report	Year 1 Day	AZI: Water and Sanitation Specialist AZI: Water and Sanitation Specialist	[Edit] [Share] [Delete] [Add]
Project Status Report	Quarter 1 Day	KIPR: Monitoring and Evaluation Specialist HARRI: Project Coordinator	[Edit] [Share] [Delete] [Add]
Reviewed	Bimester 1 Day	KIPR: Monitoring and Evaluation Specialist HARRI: Project Coordinator	[Edit] [Share] [Delete]
Monthly Summary Report	Month 5 Days	AZI: Water and Sanitation Specialist AZI: Water and Sanitation Specialist	[Edit] [Share] [Delete]

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To **add a report**, click the +Add button at upper right to bring up the category screen.

DELTA Water and Sanitation Project

Project Management

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

Report Planning Report Tracking

Category *

Periodicity * Quarter

Deadline * 1

Assigned to * RUDISHA Sharon

Report Template Import Template

Cancel OK

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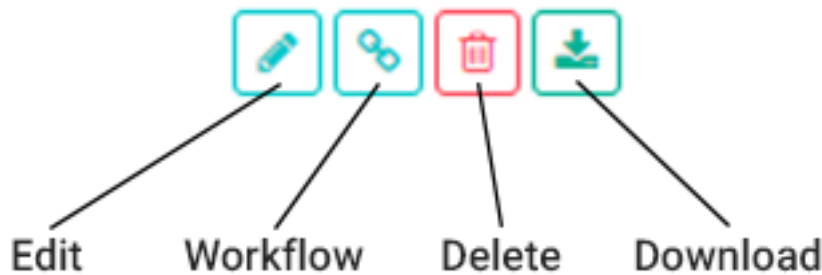
Enter the category name, the periodicity (how often the document is to be produced), and the deadline (number of days before the due date to issue an alert). Select an actor from the Assigned To pick list, and click OK when you're done to save your work and return to the Reports screen. All fields are mandatory.

Assigning a document to an actor will result in an alert appearing in their [Notifications](#) icon, the alert bell icon in the main toolbar at top right.

Project Management

You can also import a report template if one is available. Click the Import Template button to associate a template to this document category.

You can edit any document in the Document Categories list by clicking the pencil icon in its toolbar. Initiate a workflow by clicking the chainlink icon, and delete the category by clicking its trashcan icon. Document categories that contain an associated template will also feature a download icon.



To **initiate a workflow** for a document, click on the Workflow icon. Click on the +Add button to select the actors in the workflow.

Workflow ✕

Name *

Color ■

User *

Select User ▼

✓ OK

Enter the name of the workflow, and assign a user to it. Editing the color is optional, but it can serve as a marker for the person who has been assigned to it, see below. Click OK when you're done.

Each part of the workflow appears in its own tile. Create as many steps as are needed to complete the workflow for the current document category.

Project Management

The screenshot shows the Delta Project Management interface for the 'Water and Sanitation Project'. The top navigation bar includes the Delta logo, project name, and user profile. The left sidebar contains navigation icons for Home, Settings, Proj. Mgmt, Log frame, Data Collect, Dashboards, Learning, and Admin. The main content area is titled 'Project Management' and features tabs for Activity Plan & Budget, Funds Disbursement, Project Timeline, Project Reports, and Staff Reports. Under Project Reports, there are sub-tabs for Report Planning and Report Tracking. The Report Planning tab is active, showing a 'Workflow (Annual report)' section with an '+ Add' button. The workflow consists of three steps: 'Prepare Report' assigned to TRAORE Mariam Evelyne (1), 'Validate Report' assigned to DARAUAT SERGE (2), and 'Final Approval' assigned to Guinko François (3). Each step has an edit icon. At the bottom, it shows 'Currently Connected: 1 User' and 'Copyright DELTA Monitoring & Evaluation ©'.

As is the case with assigning documents, assigning users to a workflow will activate the Notification icon at top right of the screen in the main toolbar. Note that if a user is assigned to a quarterly report, for example, and the project timeline is two years, all eight notifications will appear in their Notifications list.

The **Report Tracking** screen is an at-a-glance view of all scheduled and unscheduled documents in the project pipeline, sorted according to the document categories created above. You can use the filter at the top to search documents by date range. You can also filter the document list by Scheduled status.

The screenshot shows the Delta Project Management interface for the 'Water and Sanitation Project'. The top navigation bar includes the Delta logo, project name, and user profile. The left sidebar contains navigation icons for Home, Settings, Proj. Mgmt, Log frame, Data Collect, Dashboards, Learning, and Admin. The main content area is titled 'Project Management' and features tabs for Activity Plan & Budget, Funds Disbursement, Project Timeline, Project Reports, and Staff Reports. Under Project Reports, there are sub-tabs for Report Planning and Report Tracking. The Report Tracking tab is active, showing a filter section with 'Begin' (01/01/2020), 'End' (12/31/2020), and checkboxes for 'Scheduled', 'Not Scheduled', and 'OK'. Below the filter, there is a list of reports. The first report is 'Annual report' by 'Water and Sanitation Specialist' with a due date of 'Jan 1, 2021'. The second report is 'Project Status Report' by 'Monitoring and Evaluation Specialist' with due dates for 'Quarter 1' (Apr 1, 2020), 'Quarter 2' (Jul 1, 2020), 'Quarter 3' (Oct 1, 2020), and 'Quarter 4' (Jan 1, 2021). Each report has an edit icon. At the bottom, it shows 'Currently Connected: 1 User' and 'Copyright DELTA Monitoring & Evaluation ©'.

You can search by date range and status. Click OK to apply your selections. The list will be filtered according to the options you selected.

To **update** the reporting schedule of a report with actuals, click on its Edit icon to bring up the Update window.

Project Management

Report Tracking - Update



Actual Date

08/19/2020



Document



OK

The default date is today's date. Enter the actual date of the report, then upload a document or select one from the document library in the [Learning](#) module.

Report Tracking - Update



Actual Date

08/19/2020



Document

Add a new Document



OK

Project Management

Report Tracking - Update

Actual Date

08/19/2020

Document

OK

Select from Document Library

+

To **upload a document**, click the + button to bring up the Folder Selection popup window. You can select an existing folder to save the uploaded document to by clicking on its folder icon to toggle it to 'open', or click the More (...) icon to create a new folder.

Project Management

Report Tracking - Update



Select a Folder to store the document



Sectorial Studies



Water Regulation Documents



Example Folder



Internal Reports

New Folder

Upload a document...

Write a document

upload from a link

If a workflow is associated to a report and the workflow has been initiated, the report will be locked from editing, and a dot icon will appear in the report's toolbar instead of an Edit icon.

Annual report by  Water and Sanitation Specialist

2019

Jan 1, 2020



Mouse over the dot to view comments entered during the workflow. The **color of the dot** matches the color that was assigned to the workflow step/user.

OK for document



Previous: [PM: Project Reports: Widgets](#) | Next: [Log Frame Centricity in Delta](#)

Project Management

Unique solution ID: #1043

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