

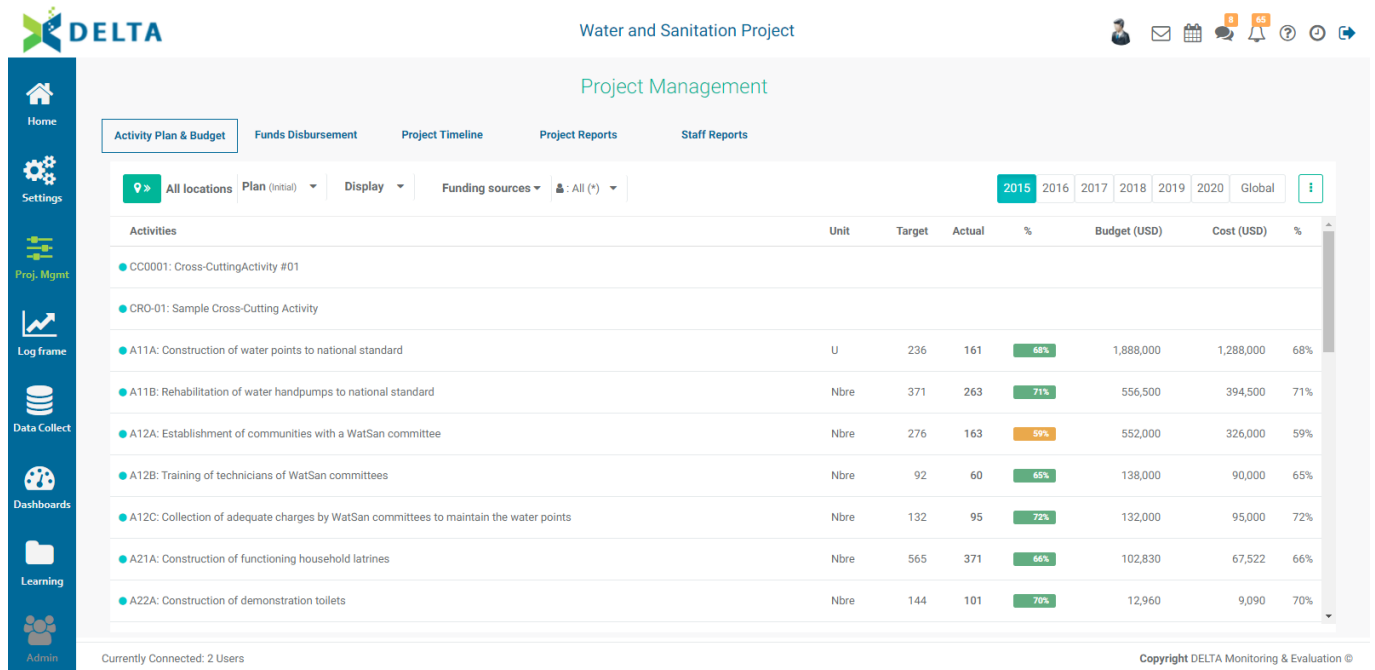
Project Management

PM: Activities: Planning an Activity

Overview

Once you have configured the activity settings, you can start planning that activity. Planning takes place from the top down, i.e. starting at the Global level (if used), then Annual, then Period. Planning information can be entered manually for each activity, or imported through the [Activity Plan & Budget](#) screen in the Project Management module.

From the Project Management module, select **Activity Plan & Budget** in the horizontal navigation.



Water and Sanitation Project

Project Management

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

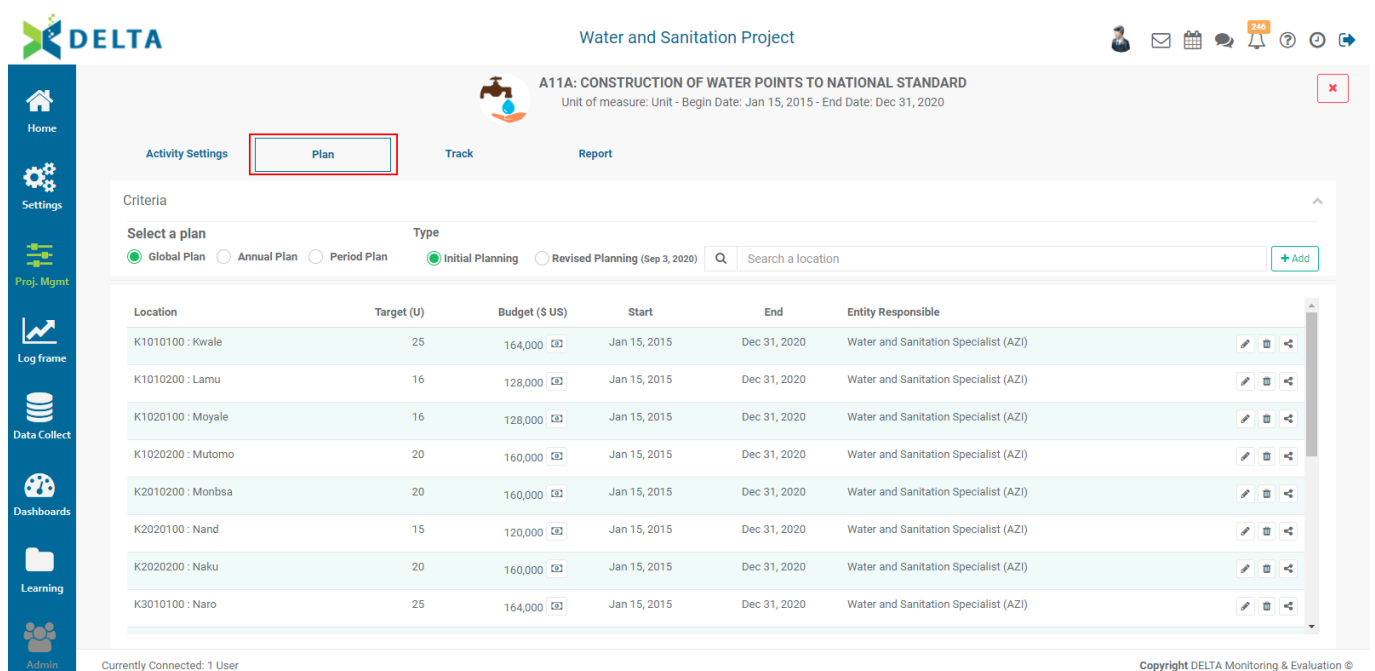
All locations Plan (Initial) Display Funding sources All (*) 2015 2016 2017 2018 2019 2020 Global

Activities	Unit	Target	Actual	%	Budget (USD)	Cost (USD)	%
CC0001: Cross-Cutting Activity #01							
CRO-01: Sample Cross-Cutting Activity							
A11A: Construction of water points to national standard	U	236	161	68%	1,888,000	1,288,000	68%
A11B: Rehabilitation of water handpumps to national standard	Nbre	371	263	71%	556,500	394,500	71%
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%

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Click the activity you want to plan to open it, and select **Plan** from the top tier navigation.



Water and Sanitation Project

A11A: CONSTRUCTION OF WATER POINTS TO NATIONAL STANDARD
Unit of measure: Unit - Begin Date: Jan 15, 2015 - End Date: Dec 31, 2020

Activity Settings Plan Track Report

Criteria

Select a plan Type

Global Plan Annual Plan Period Plan Initial Planning Revised Planning (Sep 3, 2020) Search a location + Add

Location	Target (U)	Budget (\$ US)	Start	End	Entity Responsible
K1010100 : Kwale	25	164,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K1010200 : Lamu	16	128,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K1020100 : Moyale	16	128,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K1020200 : Mutomo	20	160,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K2010200 : Mombasa	20	160,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K2020100 : Nand	15	120,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K2020200 : Naku	20	160,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K3010100 : Naro	25	164,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)

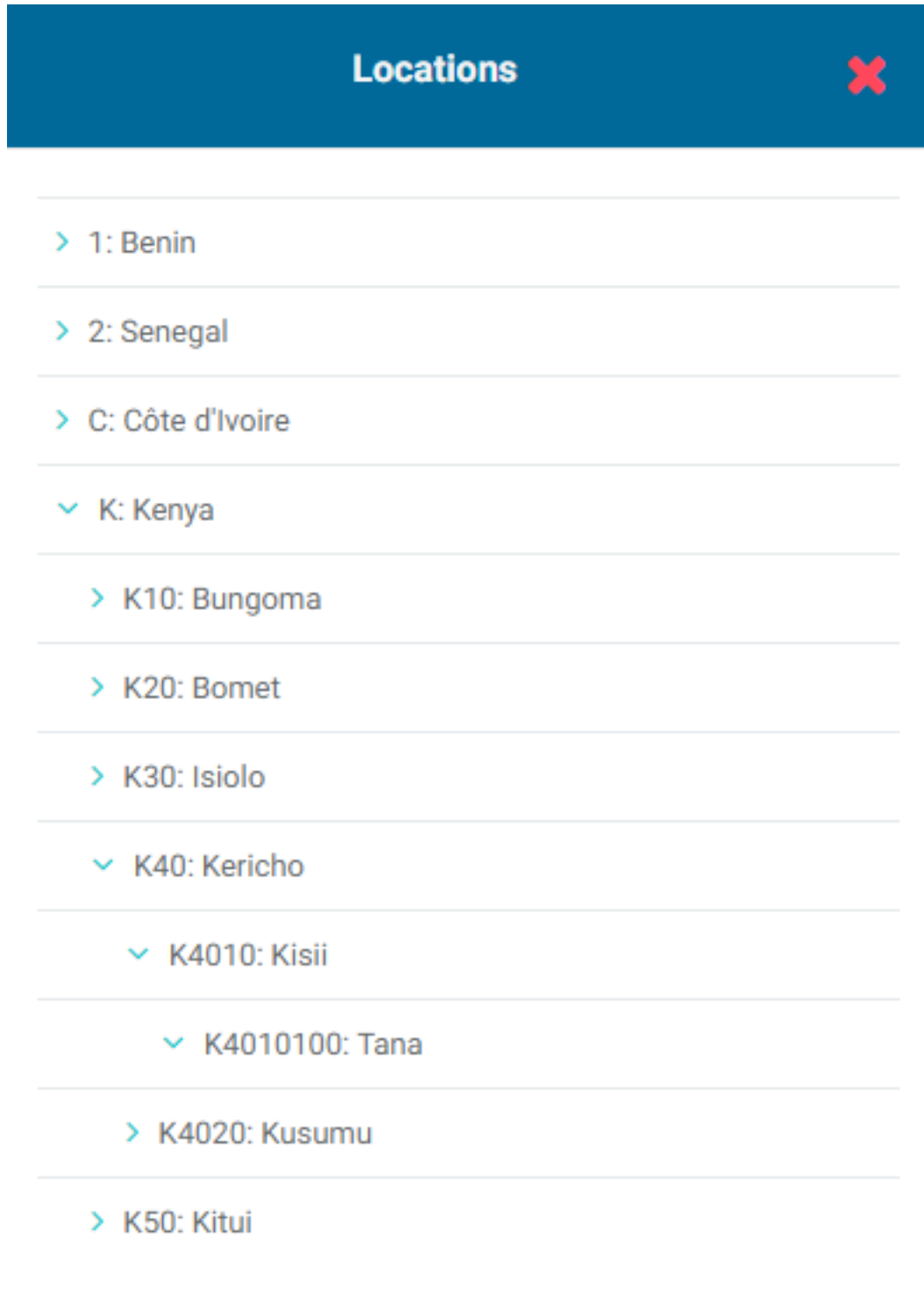
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The first time you open the Planning screen to plan an activity, it will be empty. You will add the locations where the activity takes place, and plan each one on the Global (if used), Annual, and Period levels. The example above uses Global planning, and already contains planned locations.

To **add a location**, click the +Add button at top right to bring up the Locations popup window. The contents of this window is populated by the [Locations](#) settings at the Portfolio level. If the +Add button does not appear on the screen, make sure you're at the highest level of planning for your project, either Global or Annual. Also, make sure the Initial Planning radio button is active.



Use the carets to expand and collapse the various elements of the list. Find the location you want to use, and click it to select it. Activities (the lowest level of the log frame) take place at the lowest level of the Locations geography.

Project Management

Locations



> 1: Benin

> 2: Senegal

> C: Côte d'Ivoire

✓ K: Kenya

> K10: Bungoma

> K20: Bomet

> K30: Isiolo

> K40: Kericho

✓ K50: Kitui

> K5010: Keiyo

✓ K5020: kiambu

> K5020100: Vihiga

✓ K5020200: Wajir

The Locations popup window will change to the Plan popup window.

Project Management

Global Plan



Geography Level 4: K5020200: Wajir

Target

0

Budget (\$ US)

0

Start

01/15/2015



End

12/31/2020



Entity Responsible

BRI: Planification Specialist



✓ OK

Enter the target for this activity for the entire duration of the activity within the project. If you selected Automatic Calculation: Budget & Actual Cost in the [Activity Details](#) when you configured the activity, Delta will automatically enter a budget figure based on the Unit Cost you entered in the Details screen.

Automatic Calculation



Budget



Actual Cost

NOTE: if you want to manually input budget and/or costs information, make sure you **uncheck** Automatic Calculation: Budget & Actual Cost. If you choose not to use Delta to track financials, you should also leave those options unchecked. You may also automatically track budget but not cost,

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Project Management

and vice-versa, simply by checking one box and not the other.

Note that the level of planning is displayed in the popup window title bar.

Global Plan 

Geography Level 4: K5020200: Wajir

Target

Budget (\$ US)

Start
 

End
 

Entity Responsible
 

 **OK**

The default Start and End dates are based on the project start and end dates. If the activity will take place during the entire project, leave the default dates as is. If, on the other hand, the activity will only take place during a specific duration in the project timeline, select the correct start and end dates for the activity.

Project Management

Global Plan



Geography Level 4: K5020200: Wajir

Target

65

Budget (\$ US)

520,000

Start

01/15/2015



End

12/31/2020



Entity Responsible

BRI: Planification Specialist



✓ OK

Enter the person or entity responsible for the activity. The pick list is populated by the [Stakeholders](#) you entered in the project Settings module.

Project Management

Global Plan



Geography Level 4: K5020200: Wajir

Target

65

Budget (\$ US)

520,000

Start

01/15/2015



End

12/31/2020



Entity Responsible

AZI: Water and Sanitation Specialist



✓ OK

Click OK when you're done to save your work and return to the Plan screen. The location you just added will appear on the page. **NOTE:** locations are sorted alphabetically/numerically by **Location code**. You may need to scroll to find your new location.

Project Management

DELTA

Water and Sanitation Project

A11A: CONSTRUCTION OF WATER POINTS TO NATIONAL STANDARD
Unit of measure: Unit - Begin Date: Jan 15, 2015 - End Date: Dec 31, 2020

Activity Settings Plan Track Report

Criteria

Select a plan: ☒ Global Plan ☐ Annual Plan ☐ Period Plan Type: ☒ Initial Planning ☐ Revised Planning (Sep 3, 2020) Search a location + Add

ID	Location	Budget	Begin Date	End Date	Specialist
K3020200	Teso	240,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K4010100	Tana	160,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K4020100	Thika	112,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K4020200	Mara	80,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K5010100	Gishu	120,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K5010200	Uasin	120,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K5020100	Vihiga	80,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)
K5020200	Wajir	520,000	Jan 15, 2015	Dec 31, 2020	Water and Sanitation Specialist (AZI)

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You'll notice a dollar icon next to the Budget figure. Click on it to enter the **distribution** of the budget. This functionality allows you to allocate the budget to the various [funding sources](#) (Portfolio settings) and [budget categories](#) which were entered in the Settings module. This gives you very fine-grained control over budget, cost, and financials reporting.

To **edit the budget distribution** for an activity, click the Dollar icon next to the Budget figure to open the Distribution popup window.

Distribute amount (K5020200 : Wajir) ✓ ✗

Amount to distribute: 520,000.00 \$ US

Category	Funding Source	Amount (\$ US)	
Select a category ▼	Select a funding source ▼	0	+ Add

The amount to be distributed appears at top left. The sum of all distributions to the funding sources and categories **must** equal this figure, or the system will return an error.

Select the budget category and the funding source, and enter the appropriate amount.

Distribute amount (K5020200 : Wajir) ✓ ✗

Amount to distribute: 520,000.00 \$ US

Category	Funding Source	Amount (\$ US)	
Infrastructure ▼	BMG-1134 ▼	200000	+ Add

Click the +Add button to save this allocation. The saved allocation will appear at the bottom of the popup window.

Project Management

Distribute amount
(K5020200 : Wajir)

✓✗

Amount to distribute: 520,000.00 \$ US

Category	Funding Source	Amount (\$ US)	
<div>Select a category</div>	<div>Select a funding source</div>	<div>0</div>	<div>+ Add</div>
Infrastructure	BMG-1134	200,000.00	<div><div></div><div></div></div>

Click the allocation's **Edit** icon to make any changes. Click the small inline checkmark to save your changes. Click the **Delete** icon to delete the allocation.

Repeat the steps above until the entire amount has been distributed. Delta displays a running total as you enter each allocation.

Distribute amount
(K5020200 : Wajir)

✓✗

Amount to distribute: 520,000.00 \$ US

Category	Funding Source	Amount (\$ US)	
Infrastructure	BMG-1176	50,000.00	<div><div></div><div></div></div>
Infrastructure	BMG-1134	200,000.00	<div><div></div><div></div></div>
Water Works	BMG-1176	70,000.00	<div><div></div><div></div></div>
Water Works	BMG-1134	200,000.00	<div><div></div><div></div></div>
Total		520,000.00	

When the amount has been distributed, click the checkmark in the Distribution popup window title bar to save your work and return to the Plan screen.

Using this functionality is optional; however, it affords a lot of flexibility and refinement in tracking budgets and actuals.

Each activity location has its own toolbar: **Edit**, **Delete**, and **Share**. To **edit an activity location**, click its Edit icon, make the necessary changes, and click OK to save your work and return to the Plan screen. To **delete a location**, click its Delete icon and confirm the deletion.

To **share an activity location**, click its Share icon to open the Share popup window. Entering a comment in the box enables the Share With button. If you need more space to enter your comment, click, hold, and drag the three small lines at bottom center of the Comments box to resize it.

Click the Share With button to select the recipients. All recipients are selected by default. Selected recipients are highlighted. Click OK to share the item. Recipients will get a notification in the form of a numbered badge on top of their Chat icon in the main toolbar.

Whenever you work in activity planning, you have to keep an eye on three things: which **level of planning** you're working with, which **specific year and period** you're entering information into, and whether you're using **Initial or Revised Planning**. You start with the highest level (Global or Annual), then drill down to the lower levels (Annual and/or Period), and with Initial Planning. Use the

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Project Management

radio buttons to switch to another planning timeline. This will allow you to refine your activity planning to more detailed levels.

If you opted to use Global Planning in your project definition, you'll be able to plan year over year once you select Annual Planning. Once your annual planning is done, switch to Period Planning to break down your targets and budgets for each period. You'll need to select each year and each period of each year to enter all the planning information. **NOTE:** you will not be able to enter period planning for a given location until you've entered your annual planning. If you're using global planning, you'll need to complete it before you can enter annual planning for a given location.

Click the Annual Plan radio button to switch to that level of planning. Locations which have not been planned at the Global level (if used) will not appear on this screen until Global Planning is completed. Locations which have yet to be planned for a given year will appear on the screen, but will not contain any targets or budget information.

DELTA

Water and Sanitation Project

A11A: CONSTRUCTION OF WATER POINTS TO NATIONAL STANDARD
Unit of measure: Unit - Begin Date: Jan 15, 2015 - End Date: Dec 31, 2020

Activity Settings Plan Track Report

Criteria

Select a plan: ☐ Global Plan ☒ Annual Plan ☐ Period Plan

Type: ☒ Initial Planning ☐ Revised Planning (Nov 14, 2018)

Search a location

Year	Location	Count	Budget	Start Date	End Date
2015	K3020200 : Teso	14	112,000	Jan 15, 2015	Dec 31, 2015
	K4010100 : Tana	18	144,000	Jan 15, 2015	Dec 31, 2015
	K4020100 : Thika	6	48,000	Jan 15, 2015	Dec 31, 2015
	K4020200 : Mara	6	48,000	Jan 15, 2015	Dec 31, 2015
	K5010100 : Gishu	10	80,000	Jan 15, 2015	Dec 31, 2015
	K5010200 : Uasin	6	48,000	Jan 15, 2015	Dec 31, 2015
	K5020100 : Vihiga	6	48,000	Jan 15, 2015	Dec 31, 2015
	K5020200 : Wajir			Jan 15, 2015	Dec 31, 2015

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Select the appropriate year for which to enter planning data from the pick list at top left. You can plan years in any order, but a year must be planned for Period Planning to be available for that year.

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Year
2015
2016
2017
2018
2019
2020

Click on the activity location's Edit icon to open it, and enter budget and cost information for that location and year.

Project Management

Annual Plan



Geography Level 4: K5020200 : Wajir

Target

6

Budget (\$ US)

48,000

Start

01/15/2015



End

12/31/2015



✓ OK

The default Start and End dates are based on the fiscal year. In the example above, the fiscal year is the same as the calendar year. Fiscal years are set in the [M&E settings](#) screen of the project definition. Adjust the dates as appropriate. Click OK when you're done to save your work and return to the Plan screen. The target and budget for the activity location will appear, once again sorted by alpha/numeric order of log frame code.

Since this example used Global Planning, part of the allocation information is already populated when you click on the location's Dollar icon to enter its distribution.

Project Management

Distribute amount
(K5020200 : Wajir)



Amount to distribute: 48,000.00 \$ US

Category	Funding Source	Amount (\$ US)	
INFRA - Infrastructure	BMG-1176	0.00	
INFRA - Infrastructure	BMG-1134	0.00	
WATER - Water Works	BMG-1176	0.00	
WATER - Water Works	BMG-1134	0.00	
Total		0.00	

The amount to distribute is displayed at top left. As long as the distributed amount equals that figure, some line items may be left blank; for example, if one funding source will not contribute to this activity at this location for the selected year, its line item distribution can be set to zero.

Click each line item's Edit icon to enter the appropriate amount for the funding source and budget category, and click its checkmark when you're done to save the item. Repeat until the amount has been distributed.

Distribute amount
(K5020200 : Wajir)



Amount to distribute: 48,000.00 \$ US

Category	Funding Source	Amount (\$ US)	
INFRA - Infrastructure	BMG-1176	0.00	
INFRA - Infrastructure	BMG-1134	24,000.00	
WATER - Water Works	BMG-1176	0.00	
WATER - Water Works	BMG-1134	24,000.00	
Total		48,000.00	

Click the checkmark in the Annual Planning popup window to save your work and return to the Plan screen.

To enter Period Planning, click the radio button for that level, and select the year and period for which you want to enter planning information. Periods are determined by the [M&E settings](#) you entered when you created the project.

The steps to enter Period Planning are the same as for the other planning levels. As a best practice, we suggest planning all the periods of a given year for a given location at the same time, but you can proceed however you see fit.

At the highest level of planning (Global or Annual, depending on your project definition), you can also enter **revised planning** information. Revised planning information allows you to save changes made to planning on a given date.

Project Management

To enter revised planning information, verify that you're at the highest planning level, and click the Revised Planning radio button.

☒ Revised Planning 	09/03/2020			
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Click the Edit icon next to Revised Planning to select the date of the revised planning. Click the calendar icon and navigate the calendar to select the date, and then click the checkmark to save your work. The date you selected will appear next to the Revised Planning.

☒ Revised Planning (Sep 3, 2020) 

Click on the Edit icon of every location to enter revised planning. Click OK for each popup window when you're done, and edit the next location.

NOTE: Revised Planning is only available at your highest level of planning.

Previous: [PM: Activities: Configuring an Activity](#) | Next: [PM: Activities: Tracking an Activity](#)

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