

Project Management

PM: Activities: Tracking an Activity

Overview

The next logical step once you have entered planning data into your activity is to **track the activity**. Open the activity, and click on the **Track** tab in the top tier of the horizontal navigation. This is where actuals are entered for the activity. Tracking takes place at the lowest level of planning, so you'll need to make sure the planning is complete for all the periods covered by the activity. Locations will not appear in periods for which there is no planning information.

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

Year: 2015 Period: Quarter 2 ☒ Scheduled ☒ Not Scheduled ☐ Display unit cost Search a location

K3010200 : Siaya	2	2	Apr 1, 2015	Jun 30, 2015	16,000	16,000		
K3020100 : Suba	4	4	Apr 1, 2015	Jun 30, 2015	32,000	32,000		
K3020200 : Teso	3	0	Apr 1, 2015	Jun 30, 2015	24,000	0		
K4010100 : Tana	4	2	Apr 1, 2015	Jun 30, 2015	32,000	16,000		
K4020100 : Thika	1	1	Apr 1, 2015	Jun 30, 2015	8,000	8,000		
K4020200 : Mara	1	0	Apr 1, 2015	Jun 30, 2015	8,000	0		
K5010100 : Gishu	2	1	Apr 1, 2015	Jun 30, 2015	16,000	8,000		
K5010200 : Uasin	1	1	Apr 1, 2015	Jun 30, 2015	8,000	8,000		
K5020100 : Vihiga	1	0	Apr 1, 2015	Jun 30, 2015	8,000	0		
K5020200 : Wajir	2		Apr 1, 2015	Jun 30, 2015	16,000			

Currently Connected: 1 User Copyright DELTA Monitoring & Evaluation ©

In the example above, planning information for Wajir has been entered, but not tracking data yet. To enter actuals for this activity at this location and period, verify that you're in the correct year and period, then click on the item's Edit icon in its toolbar to open the Track popup window.

Project Management

Track

Quarter 1 / 2015

K5020200 : Wajir

Actual

1

Enter Actual

Cost

8,000

0

Start

01/15/2015

End

03/31/2015

Comments

✓ OK

The popup window title bar contains the year and period, and the location appears in the window proper right beneath it. Note also that the previously entered targets and costs appear as hints in the window.

Enter the actuals and cost. If you selected automatic calculation of the cost when you configured the activity, Delta will fill in the Cost field for you based on the figure you entered in the Actual field and the Unit Cost you input when you configured the activity.

Project Management

Track

Quarter 1 / 2015

X

K5020200 : Wajir

Actual1

1

Cost8,000

8,000

Start

01/15/2015

End

03/31/2015

Comments

OK

Enter a comment if desired, and click Ok when you're done to save your work and return to the Track screen. The actuals will now appear in the location's line.

K5020200 : Wajir	1	1
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Note the dollar icon next to the Cost figure. Click on it to distribute the cost among the funding sources you previously associated with the activity, then click on each item's Edit icon to enter the allocation, then click the item's checkmark to save the allocation you entered. Repeat this step until the entire amount that appears at top left of the window has been distributed. You need to enter data in at least one line.

Project Management

Distribute amount
(K5020200 : Wajir)

✓✗

Amount to distribute: 8,000.00 \$ US

Category	Funding Source	Amount (\$ US)	
INFRA - Infrastructure	BMG-1176	4,000.00	
INFRA - Infrastructure	BMG-1134	1,500.00	
WATER - Water Works	BMG-1176	2,500.00	
WATER - Water Works	BMG-1134	0.00	
Total		8,000.00	

When you're done, click the checkmark in the Track popup window title bar to save your work and return to the Track screen.

The **Scheduled** vs **Not Scheduled** activities checkboxes allow you to filter activities based on whether planning information has been entered for a location. Locations where planning was not completed for the selected year and period are considered to be not scheduled.

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

Year

2015

Period

Quarter 1

☒ Scheduled ☒ Not Scheduled

☐ Display unit cost

Search a location

Check the **Display Unit Cost** box to display the calculated unit cost for each location. If you checked the Budget and Actual Costs boxes in the Details tab, Delta will calculate those for you, and take those calculations into account when figuring out the activity progress in the Activities tab of the project dashboard.

Previous: [PM: Activities: Planning an Activity](#) | Next: [PM: Activities: Built-In Report](#)

Unique solution ID: #1081

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