

DEVELOPMENT ASSISTANCE DATABASE FOR SOMALILAND (DAD - Somaliland)

**ANALYTICS
TOT TRAINING MANUAL**

Version 1.0

12 AUG 2013

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1. INTRODUCTION

This document contains lessons dedicated to the training of the *Development Assistance System for Somaliland (DAD Somaliland)* application analytics.

The *Development Assistance System for Somaliland (DAD Somaliland)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Somaliland. It is also a powerful tool for tracking and analyzing aid flows. The system serves as the main database and data collection and reporting system as it ensures effective access to the aid data.

The main objective of *DAD Somaliland* is to serve as a reliable and credible source of information on external aid offered to Somaliland to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

DAD Somaliland is a powerful tool that allows the user to view project data organized into lists, reports, and charts. In *DAD Somaliland*, the user is able to present the project data in the form of different analytical reports in the *List*, *Chart*, and *Report* modules, memorize/save the reports, print them, and export them into PDF, MS Word and MS Excel format files.

DAD Somaliland is designed to provide quick access to the project and aid data remotely via Internet. Once you have accessed the application, you can view the project data stored in the database, add new projects, edit existing ones, etc.

In the current design, *DAD Somaliland* is composed of the following applications:

- **Projects** – this application is designed to track the ongoing projects that are financed from external sources, e.g. donor, international NGOs, etc. Once you have accessed this application, you are able to view project details, track aid flows to the country and create analytical reports in the List, Chart, and Report modules. Moreover, in this application you can add new projects or modify the information of existing projects through a built-in online Data Entry module.
- **MDG Profile** - this application is designed to track and manage the progress towards the targets and indicators outlined in the Millennium Development Goals (MDG). Once you have accessed this application, you are able to view information and create analytical reports in the List, Chart, and Report modules. Moreover, in this application you can add information about the progress made towards the Millennium Development Goals (MDGs) through a built-in online Data Entry module.

DAD Somaliland provides a web-based user interface and requires a web browser pre-installed.

To ensure more flexibility and a more user-friendly environment, *DAD Somaliland* has been implemented as a bi-lingual system allowing the users to view the data presented in the system in two languages: English and Somali.

2. TRAINING MANUALS

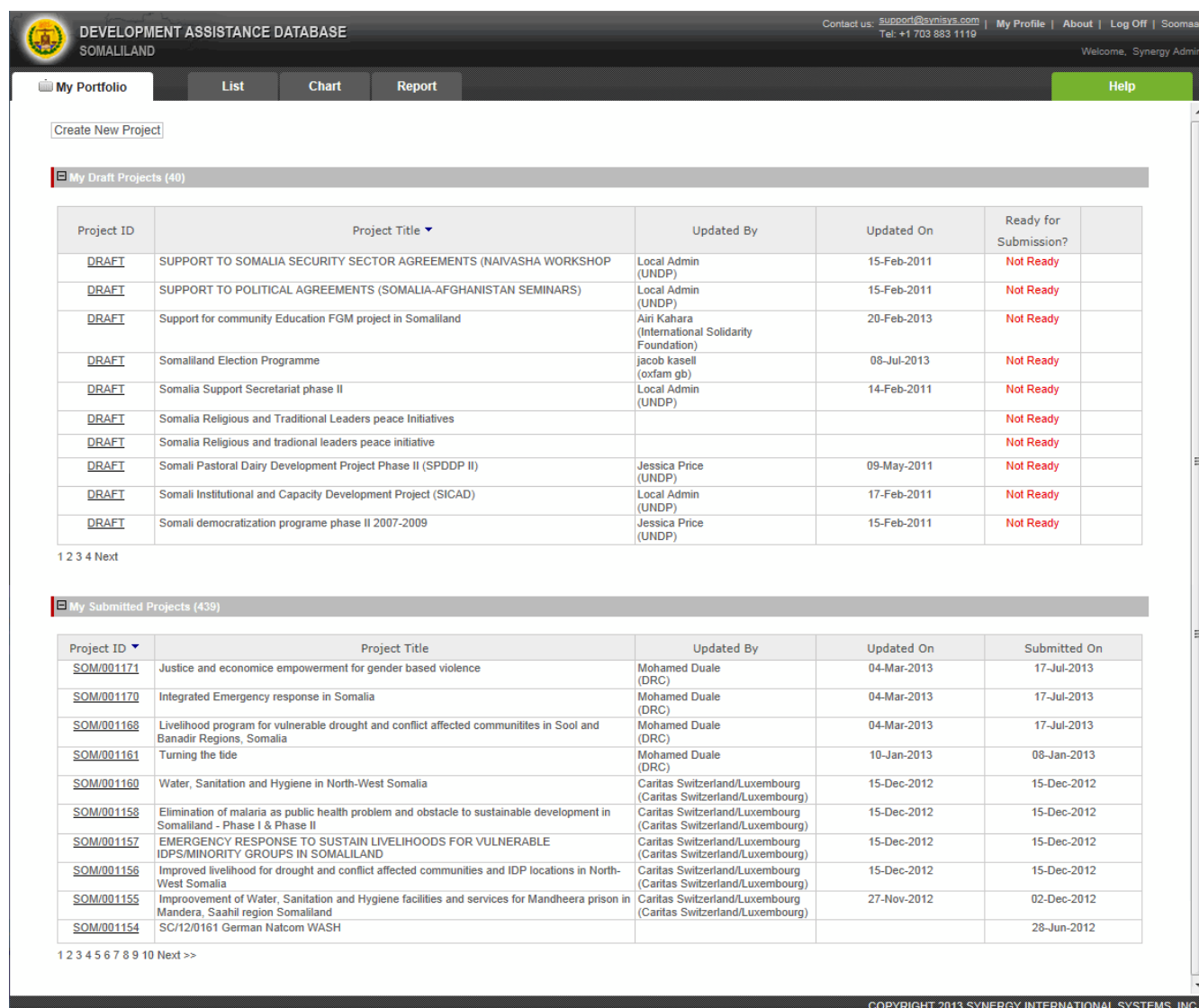
The Training Manuals will guide you on how to navigate in *DAD Somaliland* analytics and use the functions available in it.

The following lessons are offered in this document:

- [ANALYTICS – LESSON 1 – MY PORTFOLIO](#)
- [ANALYTICS – LESSON 2 – LIST](#)
- [ANALYTICS – LESSON 3 - CHART](#)
- [ANALYTICS – LESSON 4 - REPORT](#)
- [ANALYTICS – LESSON 5 - CUSTOMIZED REPORTING](#)
- [ANALYTICS – LESSON 6 - FILTERING](#)
- [ANALYTICS – LESSON 7 - SEARCH](#)

2.1 ANALYTICS – LESSON 1 – MY PORTFOLIO

This lesson will guide you through the steps on how to work in the **My Portfolio** module (Figure 1).



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My Portfolio | List | Chart | Report | Help

Create New Project

My Draft Projects (40)

Project ID	Project Title	Updated By	Updated On	Ready for Submission?
DRAFT	SUPPORT TO SOMALIA SECURITY SECTOR AGREEMENTS (NAIVASHA WORKSHOP)	Local Admin (UNDP)	15-Feb-2011	Not Ready
DRAFT	SUPPORT TO POLITICAL AGREEMENTS (SOMALIA-AFGHANISTAN SEMINARS)	Local Admin (UNDP)	15-Feb-2011	Not Ready
DRAFT	Support for community Education FGM project in Somaliland	Ain Kahara (International Solidarity Foundation)	20-Feb-2013	Not Ready
DRAFT	Somaliland Election Programme	Jacob Kasell (oxfam gb)	08-Jul-2013	Not Ready
DRAFT	Somalia Support Secretariat phase II	Local Admin (UNDP)	14-Feb-2011	Not Ready
DRAFT	Somalia Religious and Traditional Leaders peace Initiatives			Not Ready
DRAFT	Somalia Religious and traditional leaders peace initiative			Not Ready
DRAFT	Somali Pastoral Dairy Development Project Phase II (SPDDP II)	Jessica Price (UNDP)	09-May-2011	Not Ready
DRAFT	Somali Institutional and Capacity Development Project (SICAD)	Local Admin (UNDP)	17-Feb-2011	Not Ready
DRAFT	Somali democratization programme phase II 2007-2009	Jessica Price (UNDP)	15-Feb-2011	Not Ready

1 2 3 4 Next

My Submitted Projects (439)

Project ID	Project Title	Updated By	Updated On	Submitted On
SOM/001171	Justice and economic empowerment for gender based violence	Mohamed Duale (DRC)	04-Mar-2013	17-Jul-2013
SOM/001170	Integrated Emergency response in Somalia	Mohamed Duale (DRC)	04-Mar-2013	17-Jul-2013
SOM/001168	Livelihood program for vulnerable drought and conflict affected communities in Sool and Banadir Regions, Somalia	Mohamed Duale (DRC)	04-Mar-2013	17-Jul-2013
SOM/001161	Turning the tide	Mohamed Duale (DRC)	10-Jan-2013	08-Jan-2013
SOM/001160	Water, Sanitation and Hygiene in North-West Somalia	Caritas Switzerland/Luxembourg (Caritas Switzerland/Luxembourg)	15-Dec-2012	15-Dec-2012
SOM/001158	Elimination of malaria as public health problem and obstacle to sustainable development in Somaliland - Phase I & Phase II	Caritas Switzerland/Luxembourg (Caritas Switzerland/Luxembourg)	15-Dec-2012	15-Dec-2012
SOM/001157	EMERGENCY RESPONSE TO SUSTAIN LIVELIHOODS FOR VULNERABLE IDPS/MINORITY GROUPS IN SOMALILAND	Caritas Switzerland/Luxembourg (Caritas Switzerland/Luxembourg)	15-Dec-2012	15-Dec-2012
SOM/001156	Improved livelihood for drought and conflict affected communities and IDP locations in North-West Somalia	Caritas Switzerland/Luxembourg (Caritas Switzerland/Luxembourg)	15-Dec-2012	15-Dec-2012
SOM/001155	Improvement of Water, Sanitation and Hygiene facilities and services for Mandheera prison in Mandera, Saahil region Somaliland	Caritas Switzerland/Luxembourg (Caritas Switzerland/Luxembourg)	27-Nov-2012	02-Dec-2012
SOM/001154	SC/12/0161 German Natcom WASH	Caritas Switzerland/Luxembourg (Caritas Switzerland/Luxembourg)		28-Jun-2012

1 2 3 4 5 6 7 8 9 10 Next >>

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Figure 1: My Portfolio Module

2.1.1 Accessing the My Portfolio Module

Click the **My Portfolio** tab to access the *My Portfolio* module (Figure 2).



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My Portfolio | List | Chart | Report | Help

Figure 2: My Portfolio Tab

When you access the *My Portfolio* module, you are presented with the list of draft and submitted projects that you have permissions to manage. The information displayed in the *My Portfolio*

module for each project includes the following: *Project ID*, *Project Title*, *Updated By*, *Updated On*, *Ready for Submission?*, and *Submitted On*.

2.1.2 Project Submission Workflow in the My Portfolio Module

Each project created in *DAD Somaliland* either from the *My Portfolio* module or *Projects* application should get submitted first in order to become public and official. Below is the procedure of project submission:

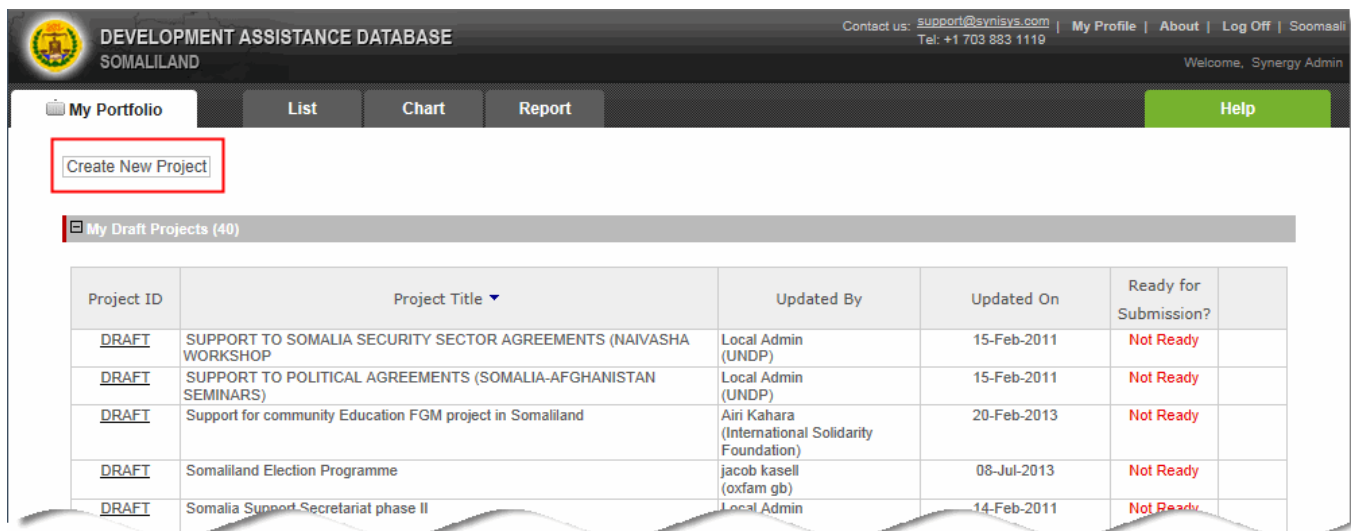
- User adds a project. It is saved as a draft in the *My Draft Projects* section of the user's portfolio (Figure 1).
- When all mandatory fields are filled in the project form, the draft becomes ready for submission.
- The draft is submitted and appears in the *My Submitted Projects* table.

Note: Only submitted drafts are displayed in the *List* table (see [ANALYTICS – LESSON 2 – LIST](#)) and accessible to other users of the *DAD Somaliland* application.

2.1.3 Actions Available in the My Portfolio Module

Depending on your permissions, you can perform the following actions in the *My Portfolio* module:

- **Add a New Project** by:
 - Clicking the **New Project** button (Figure 3).
 - Providing the information requested in the project form (see *DAD Somaliland Projects Application User Manual* in [REFERENCES](#)).
 - Saving the data input.
- **View Project Details** by:
 - Clicking the project that you want to view to access the project details section.
 - Viewing the project information recorded.



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Create New Project

My Draft Projects (40)

Project ID	Project Title ▼	Updated By	Updated On	Ready for Submission?
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DRAFT	Somaliland Election Programme	jacob kasell (oxfam gb)	08-Jul-2013	Not Ready
DRAFT	Somalia Support Secretariat phase II	Local Admin	14-Feb-2011	Not Ready

Figure 3: Create New Project Button in My Portfolio

2.2 ANALYTICS – LESSON 2 – LIST

This lesson will guide you through the steps on how to work in the **List** module (Figure 4).

Funding Agency / Project	Title	Committed (USD)
+ Africa Educational Trust (AET)		2,048,153
+ Alexander Bodini Foundation		10,000
+ Australia		1,623,485
+ Austria		367,472
+ Bureau of Population, Refugees, and Migration (PRM USA)		900,000
+ Canada		396,806
+ Caritas Luxembourg		757,115
+ Common Humanitarian Fund (CHF)		10,335,000
+ Denmark		30,220,011
+ FAO		749,079
+ Finland		5,518,082
+ Finnchurch Aid (FCA)		1,659,366
+ GAVI Alliance		1,937,578
+ Global Fund for HIV & TB		52,458,615
+ Government of Japan		85,503,849
+ Italy		18,943,044
+ Netherlands		7,455,461
+ Netherlands Government		138,800
+ Norway		43,256,745
+ OHCHR		62,700
+ Oxfam		18,652
+ Republic of Ireland		313,474

Figure 4: List Module

2.2.1 Accessing the List Module

Click the **List** tab to access the *List* module (Figure 5).

Figure 5: List Tab

2.2.2 Expanding the List Item

In order to expand the list item level, click on the '+' sign next to the name of the list item. This will expand the list item group level displaying the first sub-level (Figure 6). This can further be expanded unless there are no more sub-levels to be displayed.

Note: You can expand only one group level at a time. If you expand the group level of another list item, the previously expanded group level will get collapsed.

Figure 6: Expanding the List Item Level

2.2.3 Sorting List Items


You can sort the list view by column by clicking on the name of the column. This will sort the list alphabetically or numerically depending on the type of data entered into that column. The arrow that appears on the column can reverse the order of the list.

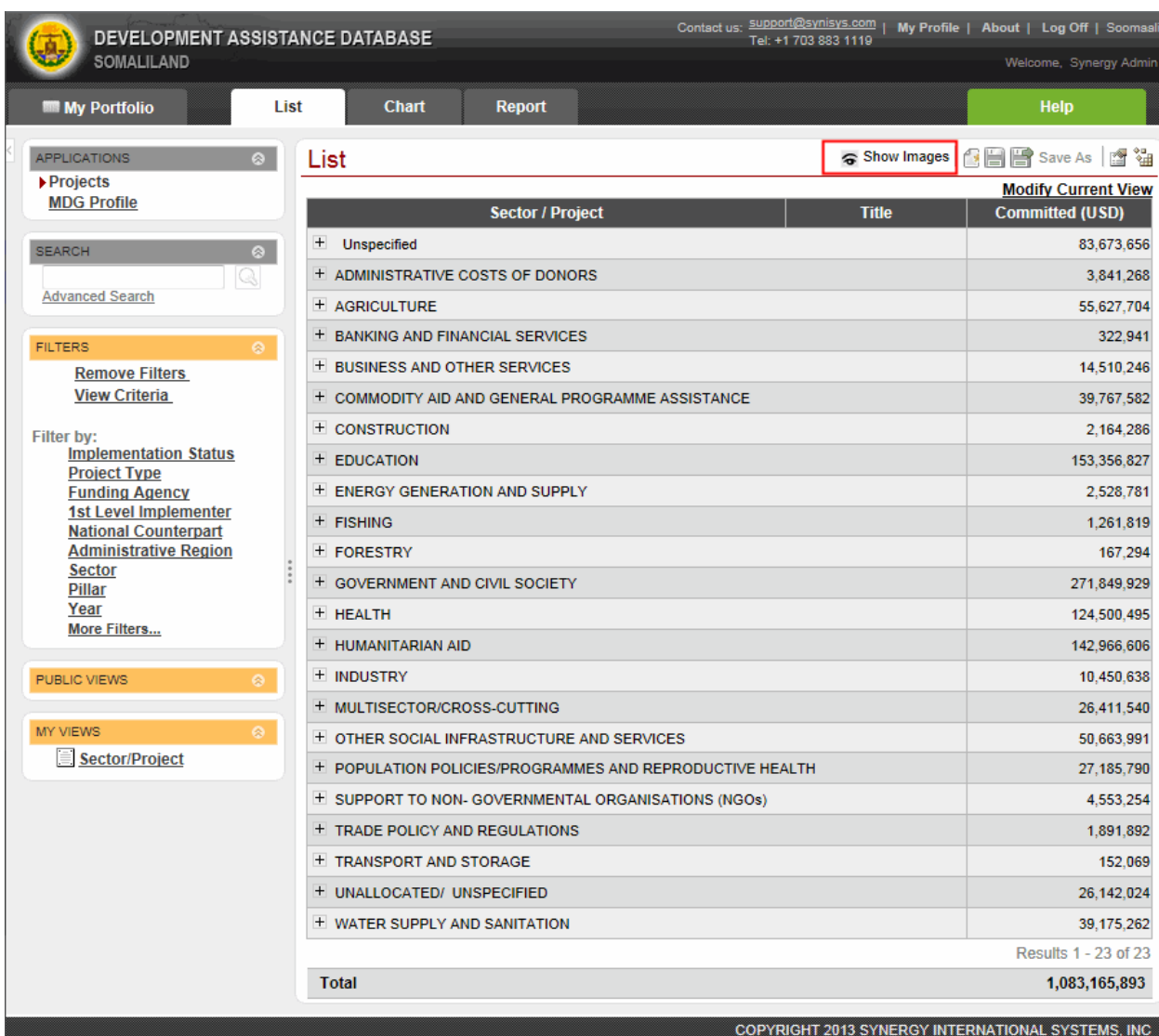
2.2.4 Browsing among List Items

You can browse among the list items by clicking on the number link of the page to navigate to. The **Previous** and **Next** buttons can be used to move to the required page.

2.2.5 Hiding / Showing Images in the List

In order to make the list load quicker, you can choose to hide the images which are displayed in the list. These images can be donor flags, sector icons, etc.

To hide the images in the list, click on the  **Hide Images** button located at the top of the screen. All the images in the screen will not display (Figure 7).



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APPLICATIONS
► Projects
MDG Profile

SEARCH
Advanced Search

FILTERS
Remove Filters
View Criteria
Filter by:
Implementation Status
Project Type
Funding Agency
1st Level Implementer
National Counterpart
Administrative Region
Sector
Pillar
Year
More Filters...

PUBLIC VIEWS
MY VIEWS
Sector/Project


List Show Images Save As

Sector / Project	Title	Modify Current View Committed (USD)
+	Unspecified	83,673,656
+	ADMINISTRATIVE COSTS OF DONORS	3,841,268
+	AGRICULTURE	55,627,704
+	BANKING AND FINANCIAL SERVICES	322,941
+	BUSINESS AND OTHER SERVICES	14,510,246
+	COMMODITY AID AND GENERAL PROGRAMME ASSISTANCE	39,767,582
+	CONSTRUCTION	2,164,286
+	EDUCATION	153,356,827
+	ENERGY GENERATION AND SUPPLY	2,528,781
+	FISHING	1,261,819
+	FORESTRY	167,294
+	GOVERNMENT AND CIVIL SOCIETY	271,849,929
+	HEALTH	124,500,495
+	HUMANITARIAN AID	142,966,606
+	INDUSTRY	10,450,638
+	MULTISECTOR/CROSS-CUTTING	26,411,540
+	OTHER SOCIAL INFRASTRUCTURE AND SERVICES	50,663,991
+	POPULATION POLICIES/PROGRAMMES AND REPRODUCTIVE HEALTH	27,185,790
+	SUPPORT TO NON- GOVERNMENTAL ORGANISATIONS (NGOs)	4,553,254
+	TRADE POLICY AND REGULATIONS	1,891,892
+	TRANSPORT AND STORAGE	152,069
+	UNALLOCATED/ UNSPECIFIED	26,142,024
+	WATER SUPPLY AND SANITATION	39,175,262
Total		1,083,165,893

Results 1 - 23 of 23

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Figure 7: Hiding Images in the List

Click the  Show Images button to show the images (Figure 7).

2.2.6 Modifying the Current View

It is possible to modify the list that is currently displayed in the List module. You can add new groupings to it or remove the selected ones, (un-) select columns, re-order them, etc. The steps described below provide for the necessary instructions for modifying the current view.

1. Click on the **Modify Current View** link at the top right corner of the **List** screen. A **Modify Current View** window (Figure 8) will appear.
2. In the **Groupings** section, add / re-order / remove groups.
3. In the **Columns** section, add / re-order / remove columns.
4. In the **Cross Tab Groupings** section, define add / re-order / remove column groupings for the view.
5. Set the view as default, if necessary. Please, note that the view can appear as default for a current user or for unregistered public users.

- After finishing making changes in the view, click the **OK** button for the changes to take effect.

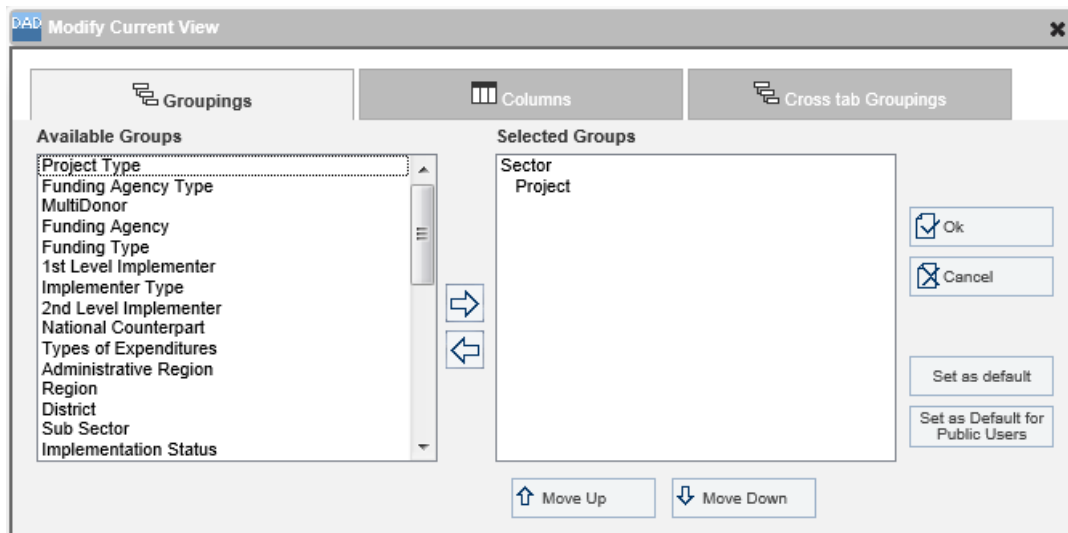



Figure 8: Modifying the Current View


To add a group / column / column grouping to the list, follow the steps below:

- In the **Available Groups / Columns** panel, select the group / column / column grouping to be added to the list.
Note: It is possible to select several groups / columns by means of the **Shift** or **Ctrl** keyboard buttons.
- Click the  (**Select**) button. The selected group(s) / column(s) will appear in the **Selected Groups / Columns** panel.

To re-order the selected groups / columns / column groupings, follow the steps below:

- Select the group / column / column grouping that needs to be re-ordered in the *Selected Groups / Columns* panel.
- Click the **Move Up / Move Down** button.

To remove the selected groups / columns / column groupings from the list, follow the steps below:

- In the *Selected Groups / Columns* panel, select the group / column / column grouping that needs to be removed from the list.
- Click the  (**Unselect**) button. The selected group(s) / column(s) / column grouping(s) will be removed from the *Selected Groups / Columns* panel.

To set a view as default, follow the steps below:

- Make the necessary changes in the current view as described in the sections above.
- After finishing, click the **Set as Default** button in the *Modify Current View* window. Please note that the view will be set as default only for the current user.

Note: Clicking the **Set as Default for Public Users** button will display the view to those who access the application as unregistered public user.

2.3 ANALYTICS – LESSON 3 - CHART

This lesson will guide you through the steps on how to work in the **Chart** module (Figure 9).

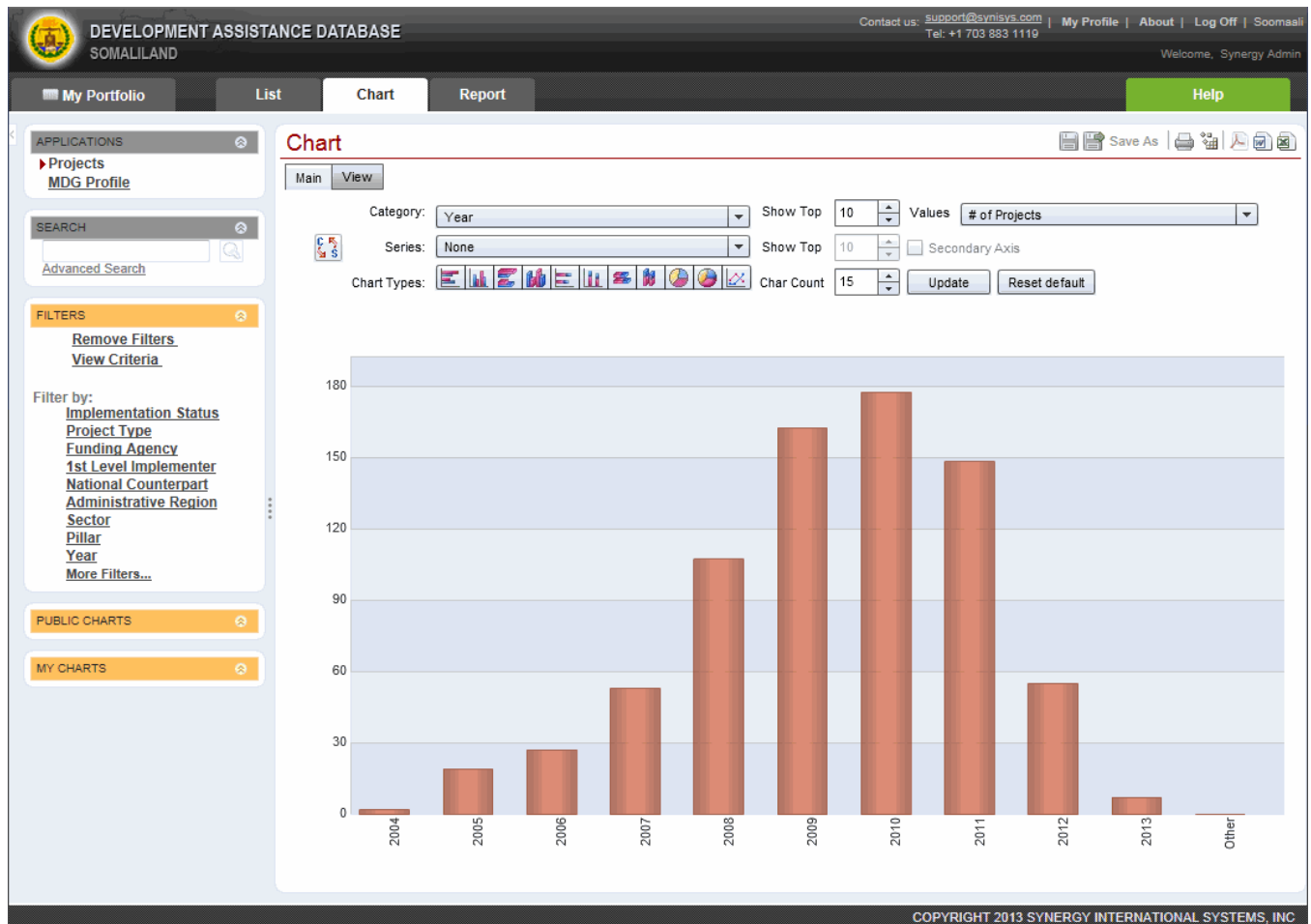


Figure 9: Chart Module

2.3.1 Accessing the Chart Module

Click the **Chart** tab to access the *Chart* module (Figure 10).



Figure 10: Chart Tab

2.3.2 Chart Options

You may define any set of options to generate the chapter.

The following options are available in the **Main** screen of Chart module (Figure 11):

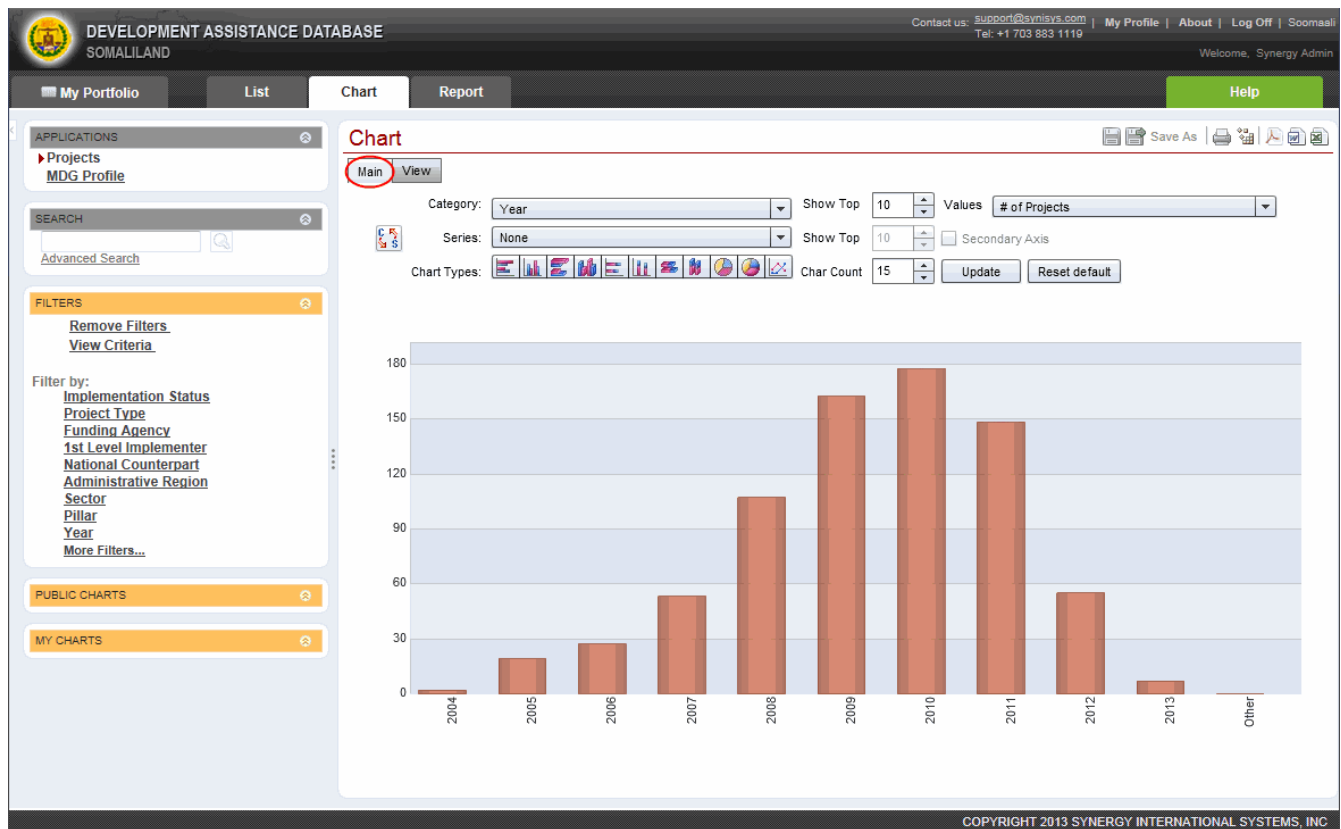














Figure 11: Main Screen of the Chart Module

1. **Category** - allows selecting one of the options provided in the **Category** drop-down menu located at the top of the *Chart* window. The selected category will define one of the chart axes. Selection of a category for the chart report is required.
2. **Series** - allows selecting one of the options provided in the **Series** drop-down menu located at the top of the *Chart* window. The selected series will define the chart legend. Selection of a series for the chart report is optional.

Note: Clicking the  (**Swap**) button allows switching places of category and series selections.

3. **Chart Types** - allows defining the chart type. The following options are available:

- Bar chart 
- Column chart 
- 3D Bar chart 
- 3D Column chart 
- Stacked Bar chart 
- Stacked Column chart 
- Stacked 3D Bar chart 
- Stacked 3D Column chart 
- Pie chart 
- 3D Pie chart 
- Line chart 

4. **Show Top <Number>** - indicates the maximal number of category items to be displayed in the chart.
5. **Show Top <Number> on Secondary Axis** - indicates the maximal number of series items that should be displayed on the secondary axis in the chart. Becomes available only if a *Series* is selected. This option is disabled if you have selected the pie or line chart types.
6. **Char Count** - limits the number of characters to be used to display the category item names to the value set in this field.
7. **Values** - allows selecting a value from the list that will define the main chart criteria.
8. **Update** - loads the latest data from the database and displays them on the chart.
9. **Reset Default** - loads the default chart built according to the default chart category and chart type.
10. **Workspace** - the main working area in the *Chart* module where the chart designer is displayed.

The following options are available in the **View** section of Chart module (Figure 12):

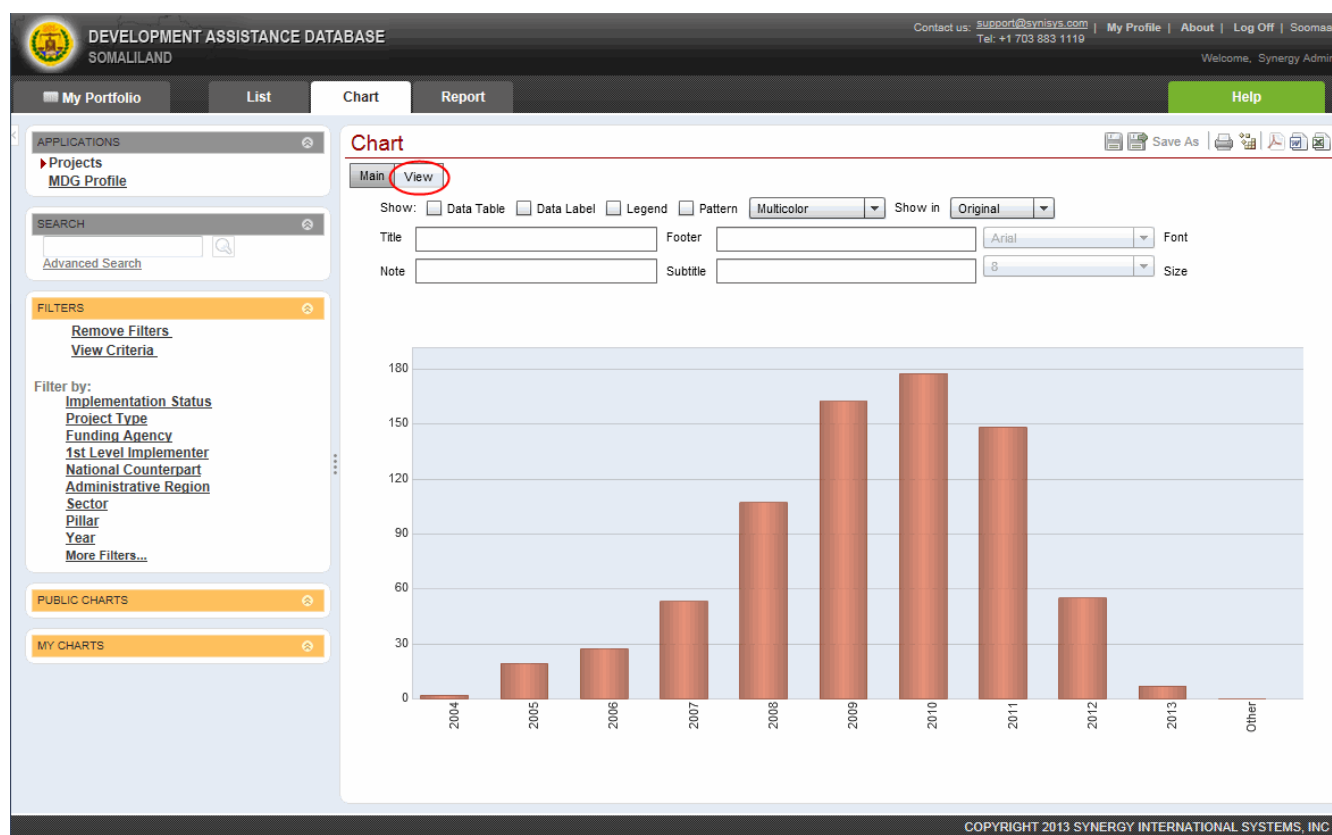


Figure 12: View Screen of the Chart Module

1. **Show** - allows selecting one or several of the following options:
 - **Data Table** - presents the information contained in the chart in a grid or matrix.

- **Data Label** - shows the actual values of each chart cell. This option is disabled if you have selected the pie or line chart types.
 - **Legend** - explains the categories and data series displayed on the chart.
 - **Pattern** - allows choosing a pattern-filled chart for black and white printing.
 - **Coloring Option** - allows defining whether the chart should be displayed in multiple colors or in one of the colors available.
 - **Show in** – allows defining how the numeric values will be displayed on the chart. To avoid large number occupying too much space, you can choose to view the numbers in thousands / millions / billions.
2. **Title** – a text box to enter the chart report title.
 3. **Note** - a text box to enter additional information about the chart report.
 4. **Footer** - a text box to insert a portion of text that will appear in the bottom area of the chart report.
 5. **Subtitle** - a text box to enter a subtitle for the chart report.
 6. **Font** - allows selecting the font the chart report title/subtitle/footer/note will appear in.
 7. **Size** - allows selecting the font size the chart report title/subtitle/footer/note will appear in.
 8. **Workspace** - the main working area in the *Chart* module where the chart designed is displayed.

When you are done with selecting chart options, press the **Update** button to generate the chart.



2.4 ANALYTICS – LESSON 4 - REPORT

This lesson will guide you through the steps on how to work in the **Report** module (Figure 14).

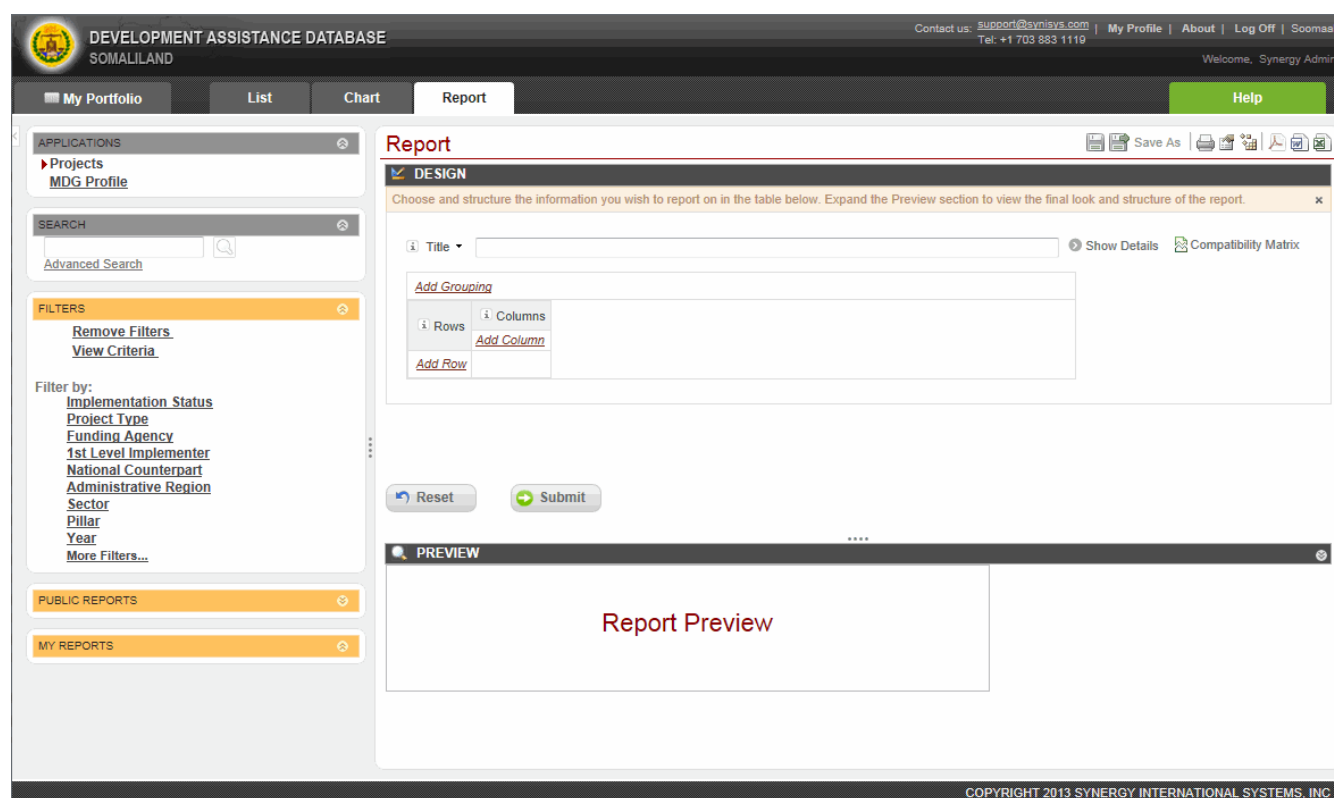


Figure 14: Report Module

2.4.1 Accessing the Report Module

Click the **Report** tab to access the *Report* module (Figure 15).

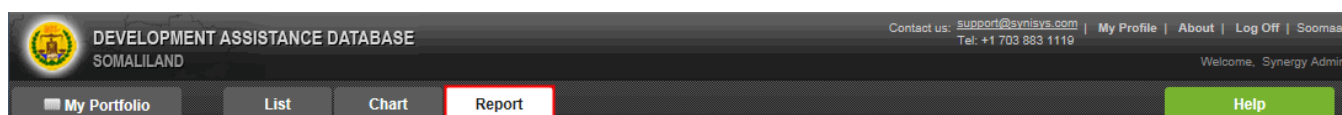


Figure 15: Report Tab

2.4.2 Creating a Report

Define what information you would like to have displayed on the generated report:

- **Text entries** – title, subtitle, header, and footer. For these fields, the expected input is a free text.
- **Report grouping** - allows grouping data according to a specific category. Grouped data appear in different tables. Each table contains data that fall under one group of the category specified.
- **Rows** - group data within the report table.
- **Columns** - show details specific to each table row.
- **Sub-columns** - divide the row details displayed under each column.

In order to add report components, follow the steps below:

1. Type the text that should appear as the report title in the **Title** text box.
 2. Enter a **Subtitle**, **Header**, and **Footer** if needed.
 3. In the **Group Report by** section, specify the category, which will be used to group data into different tables. To add a report grouping, click on the **Add Grouping** link in the *Group Report by* section and select the appropriate category from the menu that appears (Figure 16).
- Note:** The report will be divided into as many tables as there are table groupings selected.
4. Select table rows by clicking on the **Add Row** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one row at a time from the list of available rows.
 5. Select table columns by clicking on the **Add Column** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one column at a time from the list of available columns.

Note: Once you have selected a report column, an **Add Sub-column** link becomes available under the selected column. It allows indicating how the row details displayed under each column will be divided.

The screenshot displays the 'Report' design interface. On the left, there are navigation tabs: 'My Portfolio', 'List', 'Chart', and 'Report' (selected). Below these are sections for 'APPLICATIONS' (Projects, MDG Profile), a 'SEARCH' bar with 'Advanced Search', and 'FILTERS' (Remove Filters, View Criteria). A 'Filter by:' section lists various criteria like Implementation Status, Project Type, Funding Agency, etc. At the bottom left are 'PUBLIC REPORTS' and 'MY REPORTS' buttons. The main 'Report' section has a 'DESIGN' tab. It contains input fields for Title, Subtitle, Header, and Footer. Below these are 'Add Grouping' and 'Add Row' links. The 'Add Grouping' dropdown is open, showing a list of categories. 'Sector and Location' is selected, and its sub-menu is also open, showing options like Sector, Sub Sector, Administrative Region, Region, and District. At the bottom, there is a 'PREVIEW' section with a placeholder for the 'Report Preview'.

Figure 16: Selecting a Grouping for a Report

Note: At any point it is possible to remove all components selected for the report and design a new report from scratch by clicking on the  **(Reset)** button.

Note: If you have defined a report which has incompatible columns (columns over which reports cannot be generated), they will be marked in red and an error message will occur. To make your reports productive, use the link (as marked in red, Figure 16) to open the *Compatibility Matrix* table (Figure 17). This is a table that displays the compatibility between all categories and measures in the database to display them in the report.

Compatibility Matrix											
* - indicates compatibility between Category and Measure											
Rows(Categories) / Columns(Measures)	# of Projects	Budget Amount (SOS)	Budget Amount (USD)	Committed (SOS)	Committed (USD)	Disbursed (SOS)	Disbursed (USD)	Expended (SOS)	Expended (USD)	Project Budget (SOS)	Project Budget (USD)
1st Level Implementer	*	*	*	*	*	*	*	*	*	*	*
2nd Level Implementer	*	*	*	*	*	*	*	*	*	*	*
Administrative Region	*	*	*	*	*	*	*	*	*	*	*
Asset Type	*	*	*	*	*	*	*	*	*	*	*
Beneficiary	*	*	*	*	*	*	*	*	*	*	*
Beneficiary Types	*	*	*	*	*	*	*	*	*	*	*
Contract Reference #	*	*	*	*	*	*	*	*	*	*	*
Cross-Cutting Themes	*	*	*	*	*	*	*	*	*	*	*
Data Quality Grade	*	*	*	*	*	*	*	*	*	*	*
Data Quality Reason	*	*	*	*	*	*	*	*	*	*	*
Disaggregate Budget	*	*	*	*	*	*	*	*	*	*	*
District	*	*	*	*	*	*	*	*	*	*	*
Expended Cost Type	*	*	*	*	*	*	*	*	*	*	*
Funding Agency	*	*	*	*	*	*	*	*	*	*	*
Funding Agency Type	*	*	*	*	*	*	*	*	*	*	*
Funding Type	*	*	*	*	*	*	*	*	*	*	*
Implementation Status	*	*	*	*	*	*	*	*	*	*	*
Implementer Type	*	*	*	*	*	*	*	*	*	*	*
KP Indicators	*	*	*	*	*	*	*	*	*	*	*
MDG	*	*	*	*	*	*	*	*	*	*	*
Month/Year	*	*	*	*	*	*	*	*	*	*	*
MultiDonor	*	*	*	*	*	*	*	*	*	*	*
National Counterpart	*	*	*	*	*	*	*	*	*	*	*
NDP Pillar	*	*	*	*	*	*	*	*	*	*	*
NDP Sector	*	*	*	*	*	*	*	*	*	*	*
PD Indicator	*	*	*	*	*	*	*	*	*	*	*
Pillar	*	*	*	*	*	*	*	*	*	*	*
Priority Level	*	*	*	*	*	*	*	*	*	*	*
Project	*	*	*	*	*	*	*	*	*	*	*
Project Nature	*	*	*	*	*	*	*	*	*	*	*
Project Status	*	*	*	*	*	*	*	*	*	*	*
Project Type	*	*	*	*	*	*	*	*	*	*	*
Region	*	*	*	*	*	*	*	*	*	*	*
Sector	*	*	*	*	*	*	*	*	*	*	*
Sub Pillar	*	*	*	*	*	*	*	*	*	*	*
Sub Sector	*	*	*	*	*	*	*	*	*	*	*
Types of Expenditures	*	*	*	*	*	*	*	*	*	*	*
UNSAS Cross Cutting Themes	*	*	*	*	*	*	*	*	*	*	*
UNSAS Outcomes	*	*	*	*	*	*	*	*	*	*	*
UNSAS Sub Outcomes	*	*	*	*	*	*	*	*	*	*	*
Year	*	*	*	*	*	*	*	*	*	*	*

Figure 17: Compatibility Matrix

2.4.3 Previewing a Report

Look in the *Preview* section at the bottom of the page in order to view the final structure of the report (Figure 18). The *Preview* will not be ready for viewing unless you have at least one table row defined.

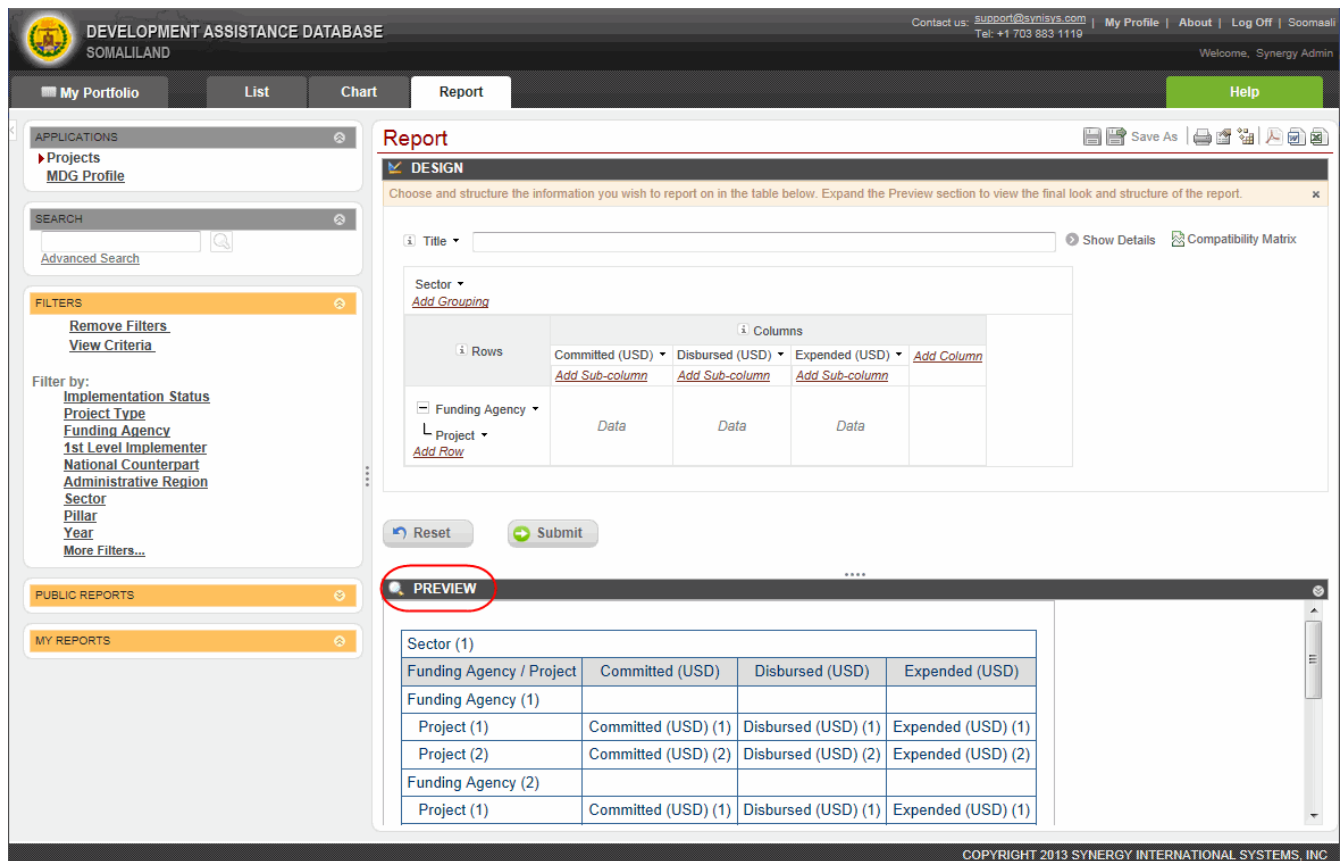



Figure 18: Previewing the Report

All your added report components and structuring results will be displayed in the *Preview* section which helps you to check whether the report matches the required output or not. Expand the section in order to display whole of the information.

2.4.4 Generating a Report

Click the  (**Submit**) button to submit the Reporting Engine in order to access the database, gather the required data and present it in the manner required. The Report containing all the real data appears in a new window.

2.4.5 Formatting/Styling Report Components

You may format/style the text entries as well as main report table captions and values by assigning to them value characteristics such as font, font size, font color, background color, alignment (i.e. left, center, or right), etc. In order to format/style a report component, follow the steps below:

1. Click the report component that needs to be formatted / styled.
2. Select the **Properties** option from the actions list that appears (Figure 19).

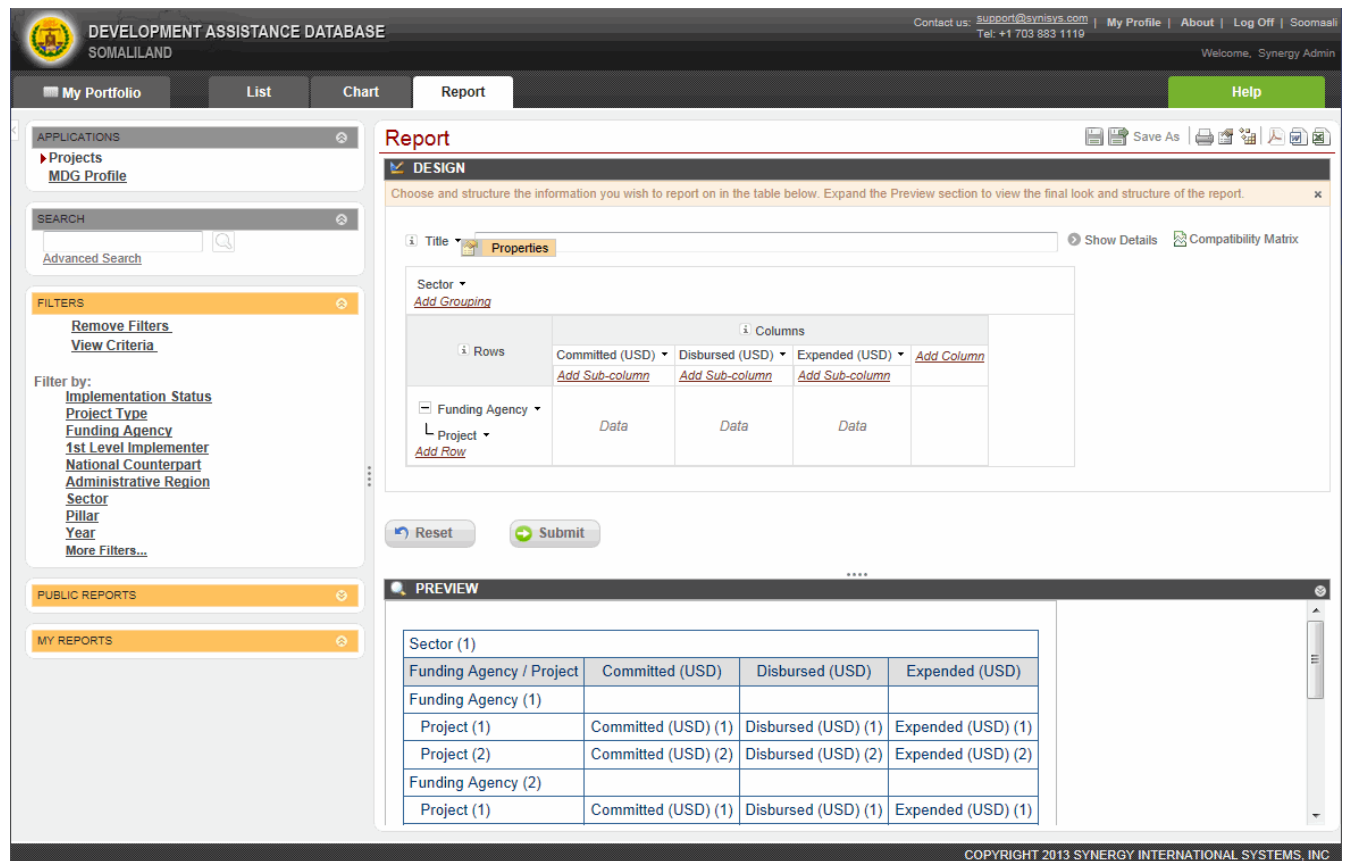


Figure 19: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. Please note that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 20). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics, e.g. sorting order, reference text, etc. (Figure 22).

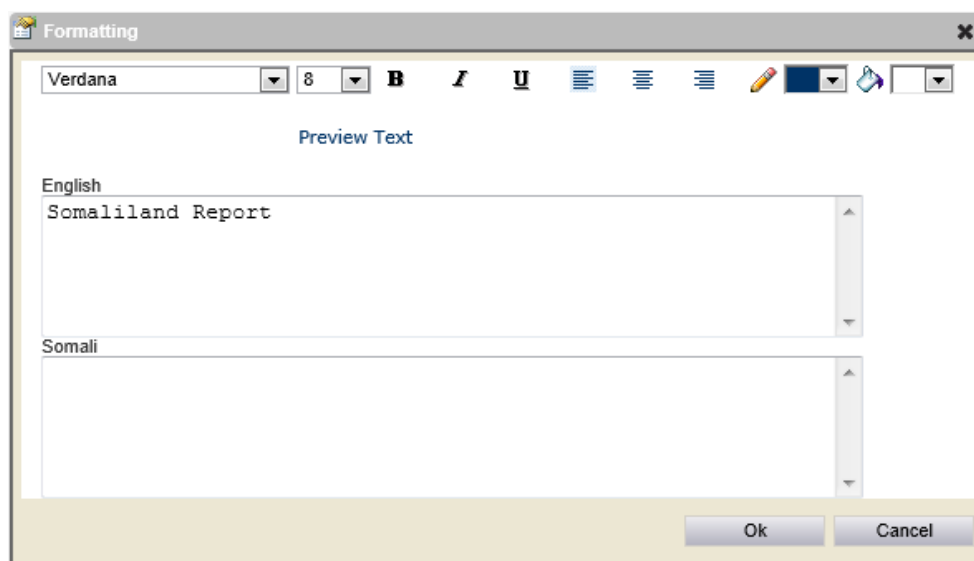


Figure 20: Formatting/Styling Text Entries

3. Change the properties as needed.

Note: To prevent you navigating away from the section every time when modifying the properties of a different report table component, the *Properties* window allows selecting the next item to be modified. To do that, you need to select the appropriate instance from the *Items* drop-down list in the *Properties* window. The list contains the previously selected report table components.

- Click the **Apply** button for the changes to take effect. Clicking the **OK** button will close the window and navigate you to the **Report** module.

Report

DESIGN

Choose and structure the information you wish to report on in the table below. Expand the Preview section to view the final look and structure of the report.

Title Show Details Compatibility Matrix

Sector Add Grouping

Rows	Committed (USD) <input type="text"/> Add Sub-column	Disbursed (USD) <input type="text"/> Add Sub-column	Columns
Funding Agency <input type="text"/> Add Row	Data	Data	<ul style="list-style-type: none"> Expression Show As Sorting Order Move Up Move Down Move Left Move Right Remove Replace Switch Place With Properties

Reset Submit

PREVIEW

Sector (1)				
Funding Agency / Project	Committed (USD)	Disbursed (USD)	Expended (USD)	
Funding Agency (1)				
Project (1)	Committed (USD) (1)	Disbursed (USD) (1)	Expended (USD) (1)	
Project (2)	Committed (USD) (2)	Disbursed (USD) (2)	Expended (USD) (2)	
Funding Agency (2)				
Project (1)	Committed (USD) (1)	Disbursed (USD) (1)	Expended (USD) (1)	

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Figure 21: Reports Window with Properties Focus on the Column

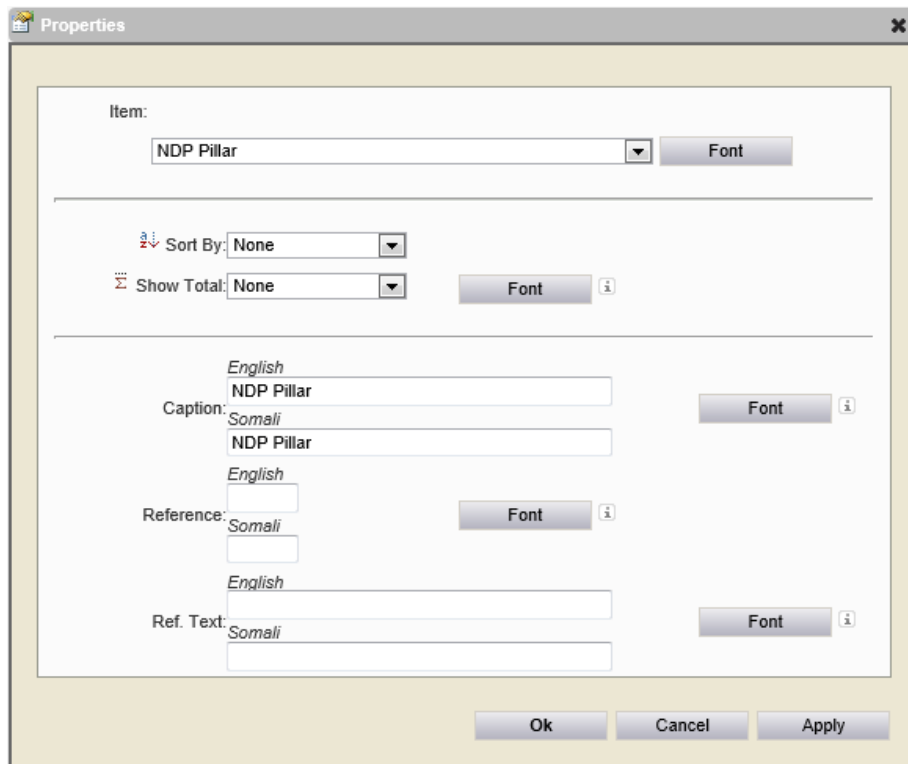


Figure 22: Assigning Properties to Report Table Components

2.4.6 Re-ordering Report Table Components

In order to re-order report table components, follow the steps described below:

1. Click the component item that needs to be reordered in the report.
2. Select the respective **Move Up / Move Down / Move Right / Move Left** option from the menu that appears. The report generated will maintain the order of the items that was displayed in the *Report Designer* (Figure 23).

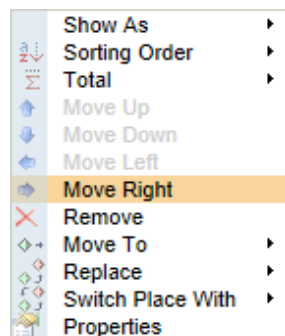


Figure 23: Reordering Report Table Components

Note: If any of these actions is not available, the respective option will be disabled in the menu.

2.4.7 Sorting Report Table Components

In order to alphabetically sort the report table components in *Ascending* (A-Z) or a *Descending* (Z-A) order, follow the steps below:

1. Click the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 24).
3. Define whether the report item values should be sorted in the ascending or descending order. Please note that selecting the **None** option from the list removes the sorting criteria.

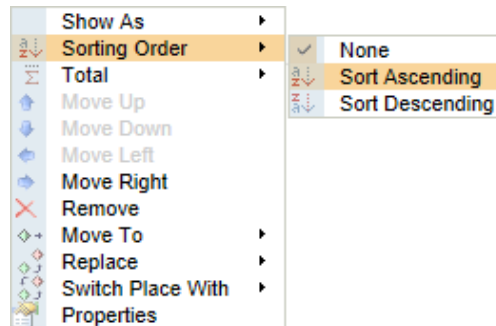


Figure 24: Defining the Sorting Order

2.4.8 Removing a Report Table Component

In order to remove a report table component, follow the steps below:

1. Click on the component item that needs to be removed.
2. Select the **Remove** option from the menu that appears. The selected grouping value will be removed.

2.4.9 Switching Report Table Components

In order to switch report table components, follow the steps below:

1. Click the component item that needs to be switched.
2. Select the **Switch Place with** option from the menu that appears (Figure 25).

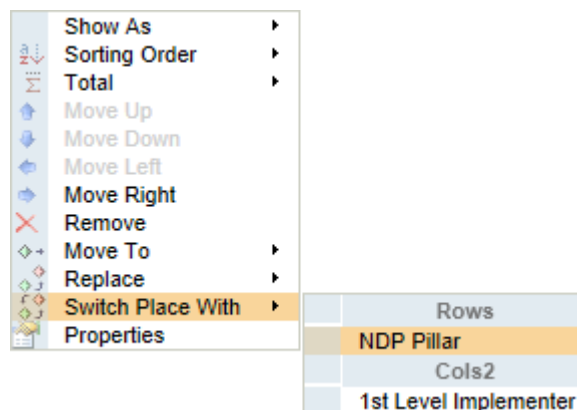


Figure 25: Switching Report Table Components

3. Define what component item the selected instance needs to switch place with. The selected component item will be removed from its current position and added as an item to the specified component.


2.5 ANALYTICS – LESSON 5 - CUSTOMIZED REPORTING

This lesson will guide you through the steps on how to customize the already-created reports in the *List*, *Chart*, and *Report* modules, i.e. to define the way the numeric values can be displayed, their format, the number of the items to be displayed, etc. You may also re-organise the reports in the desired way, i.e. include it into a group of reports or create a new report group for it, rename the report, etc. The *DAD Somaliland* application can also export the reports to the desired format (Word, Excel, etc.) or print them out.

2.5.1 Setting Report Options

In the *List* and *Report* modules, you can define whether the numeric values should be displayed in thousands, millions, etc.

In order to set the report options, follow the steps below:

1. Click the  (**Set Options**) button in the top toolbar. An *Options* window (Figure 26) will appear.
2. Define the format in which the numeric values should be displayed, i.e. whether the original values should be displayed or they should be shown in thousands, millions, etc. This prevents large numeric values represented by many zeros from taking a lot of space in the report.

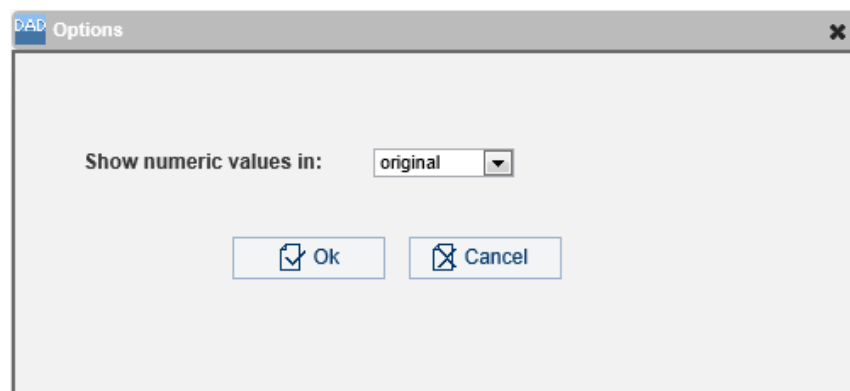



Figure 26: Setting the Chart Report Options

3. Click the **OK** button for the changes to take effect.

2.5.2 Saving Reports

There are two ways of saving a report in the *DAD Somaliland* application. You can save a newly-created report, or save a copy of an existing report with a different name, in a different location, or with a different content.

In order to save the report created, follow the steps below:

1. Click the  (**Save**) button on the top right side of the screen. A *Memorize Report* window (Figure 27) will appear.
2. Define the report name in the *Memorized Name* field in English and Somali.

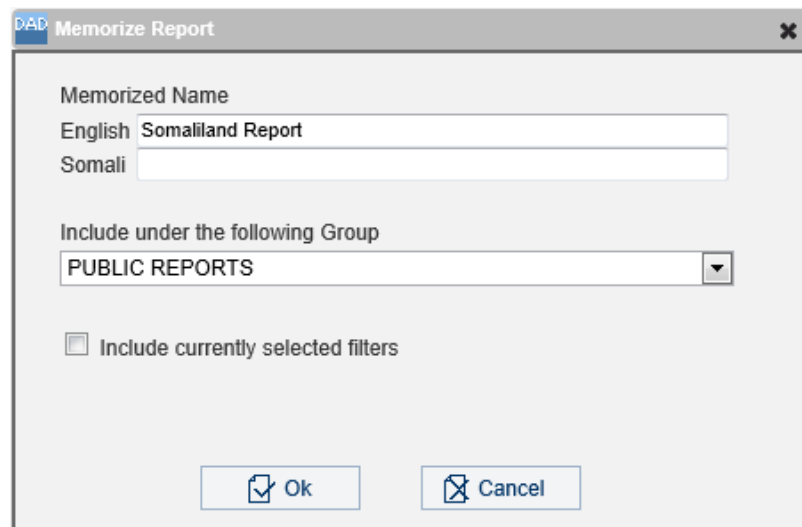




Figure 27: Memorizing a Report

3. Specify the group the report will be included in by selecting the appropriate value from the *Include under the Following Group* combo box.
4. Check the *Include currently selected filters* checkbox to save filtering defined along with the report.
5. Click on the **OK** button to save the report for future reference.

In order to save a copy of an existing report, follow the steps below:

1. Click on the  **Save As** button on the top right side of the screen. A *Memorize Report* window (Figure 27) will appear.
2. Save the report by the steps described in the section above.

2.5.3 Re-organising Reports

From the *List*, *Chart*, and *Report* modules, you can design appropriate reports and organize them in the preferred way. In order to organise the reports, click the respective  (**Organise Views / Charts / Reports**) button at the top right side of the screen. An *Organise Reports* window (Figure 28) will appear.

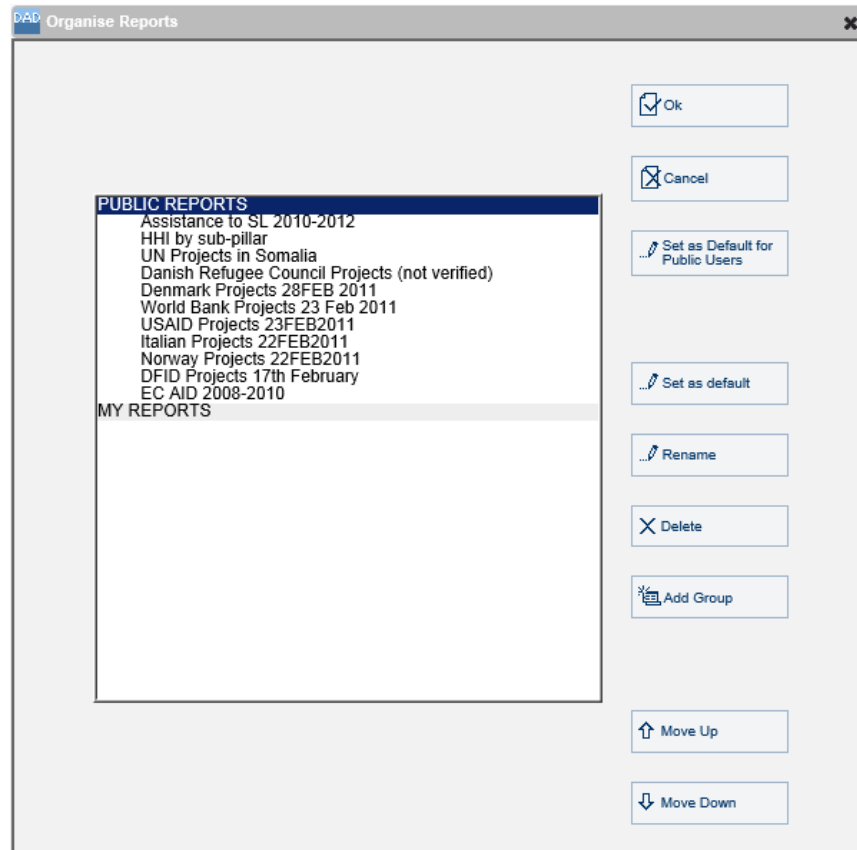


Figure 28: Organizing the Reports

You may perform the following actions:

- rename a report/report group:
 1. Highlight the report / group to be renamed.
 2. Click the **Rename** button.
 3. Fill in the desired name for the report / group.
 4. Click the **Enter** keyboard button to confirm renaming.

Note: *Public Reports* and *My Reports* groups cannot be renamed.
- delete a report/report group:
 1. Highlight the report / group to be deleted.
 2. Click the **Delete** button.
 3. Click the **OK** button to confirm deletion.

Note: *Public Reports* and *My Reports* groups cannot be deleted.
- add a sub-group:
 1. Click the **Add Group** button.
 2. Fill in the desired name for the sub-group.
 3. Click the **Enter** keyboard button to confirm adding.
- re-order reports/report groups:
 1. Highlight the report / group the sorting order of which needs to be changed.
 2. Click the **Move Up** / **Move Down** button.
 - 3.




- In order to set a report as default, follow the steps below:
 1. Highlight the report to be displayed in the respective module when you access it.
 2. Click the **Set as Default** button. The selected report will be marked with *(default for me)* option.

Note: The **Set as Default for Public Users** button is only available for administrators and will save the current view as a default for all unregistered/public users.

Note: This option is available only in the *Chart* and *Report* modules.

2.5.4 Viewing Pre-defined Reports


In the *List*, *Chart*, and *Report* modules, you can view the pre-defined reports stored under **Public Views/Charts/Reports** or **My Views/Charts/Reports** section for data analysis and comparison. For this purpose, select the report to display and click one of the following **Generate Report** buttons to the left of the report name:

-  - in the *List* module;
-  - in the *Chart* module;
-  - in the *Report* module.

The selected report will open in the application window (*List* and *Chart* modules) or a new window (*Report* module). The same results can be achieved if you click the report name.

2.5.5 Editing Pre-defined Reports

To save you the time and the effort of structuring a report from the scratch when it is necessary to introduce some modifications in any of the pre-defined reports stored under **Public Reports** or **My Reports**, the *Edit* option has been designed in the *Report* module.




In order to edit reports, click the  (**Edit**) button to the left of the report to edit. The selected report structure will be loaded in the application window giving you the possibility of formatting and styling it in the desired way.

The pre-defined *List* and *Chart* reports stored in **Public Views/Charts** or **My Views/Charts** can also be edited after you have selected to view them. Once the selected report is loaded in the application window, make the appropriate changes and save them. If you wish to keep the modifications, do not forget to save the modified report.

2.5.6 Exporting Reports


From the *Chart* and *Report* modules, you can design appropriate reports and export them in the PDF, MS Word and MS Excel formats.

In order to export the reports in the PDF, MS Word and MS Excel formats, follow the steps below:

1. Click on the respective  (**Export in PDF Format**) /  (**Export in MS Word Format**) /  (**Export in MS Excel Format**) button. A separate window will open.
2. Make changes, if necessary.

2.5.7 Printing Reports

From the *Chart* and *Report* modules, you can design appropriate reports and print them out. In order to print out the selected report, follow the steps below:

1. Click the  (**Print**) button on the top toolbar in the right side of the screen. A separate window will open.
2. Select the *Print* option.

2.6 ANALYTICS – LESSON 6 - FILTERING

This lesson will guide you through the steps on how to create **Filters**.

2.6.1 Accessing the Filtering Section

You can see the **Filters** section on the left side of the applications (Figure 29).

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SOMALILAND

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My Portfolio | **List** | Chart | Report | Help

APPLICATIONS
► Projects
MDG Profile

SEARCH
Advanced Search

FILTERS
[Remove Filters](#)
[View Criteria](#)
Filter by:
[Implementation Status](#)
[Project Type](#)
[Funding Agency](#)
[1st Level Implementer](#)
[National Counterpart](#)
[Administrative Region](#)
[Sector](#)
[Pillar](#)
[Year](#)
[More Filters...](#)

PUBLIC VIEWS
MY VIEWS
Sector/Project

List Show Images Save As

Sector / Project	Title	Committed (USD)
+	Unspecified	83,673,656
+	ADMINISTRATIVE COSTS OF DONORS	3,841,268
+	AGRICULTURE	55,627,704
+	BANKING AND FINANCIAL SERVICES	322,941
+	BUSINESS AND OTHER SERVICES	14,510,246
+	COMMODITY AID AND GENERAL PROGRAMME ASSISTANCE	39,767,582
+	CONSTRUCTION	2,164,286
+	EDUCATION	153,356,827
+	ENERGY GENERATION AND SUPPLY	2,528,781
+	FISHING	1,261,819
+	FORESTRY	167,294
+	GOVERNMENT AND CIVIL SOCIETY	271,849,929
+	HEALTH	124,500,495
+	HUMANITARIAN AID	142,966,606
+	INDUSTRY	10,450,638
+	MULTISECTOR/CROSS-CUTTING	26,411,540
+	OTHER SOCIAL INFRASTRUCTURE AND SERVICES	50,663,991
+	POPULATION POLICIES/PROGRAMMES AND REPRODUCTIVE HEALTH	27,185,790
+	SUPPORT TO NON- GOVERNMENTAL ORGANISATIONS (NGOs)	4,553,254
+	TRADE POLICY AND REGULATIONS	1,891,892
+	TRANSPORT AND STORAGE	152,069
+	UNALLOCATED/ UNSPECIFIED	26,142,024
+	WATER SUPPLY AND SANITATION	39,175,262
Total		1,083,165,893

Results 1 - 23 of 23

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Figure 29: Filtering Section

2.6.2 Creating Filtering Criteria

Follow the instructions below to create filtering criteria:

1. Click on the hyperlink under the **Filters** section that represents the **Category** according to which the filtering will be carried out. A **Filters** window (Figure 30) will appear having the **Category Item** pull down menu set to the selected **Category**. The first text area holds a list of all the available **Category** items that the report could display, whereas the second

text area holds a sub-set list of the first one. You may only edit the sub-set list in the second text area. At the end of the filtering, if the sub-set list is empty, all the **Category** items will be included in the report. If, however, the sub-set is non-empty, only the items in the sub-set list will be included in the report. At the bottom of the pop-up window the selection criteria from all categories are presented. This view is also available from the main screen under the hyperlink **View Criteria**.

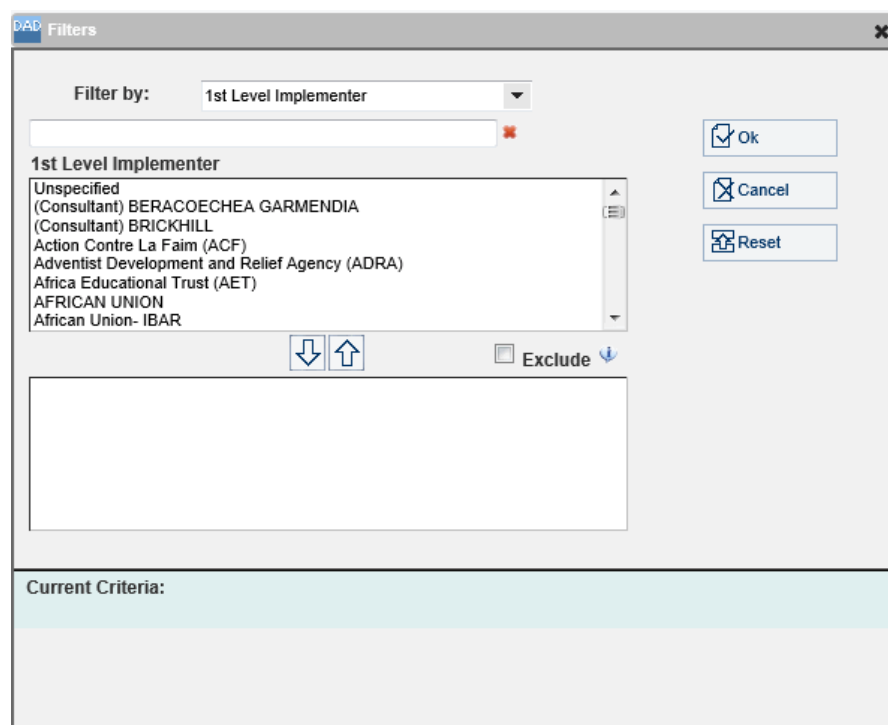


Figure 30: Creating a Filtering Criteria

2. Select a **Category** item from the list in the first text area.

Note: To make it easier to locate the appropriate category item in the long list, the *Filters* window has a search capability. To find the relevant category item, you can enter any combination of letters in the search field. The list of all category items matching the criteria will be displayed in the first text area (Figure 31). To remove the search criteria, use the **X** (Delete) button to the right of the search field.

DAD Filters

Filter by: Funding Agency

Foundation

Funding Agency

Alexander Bodini Foundation
United Nations Foundation

Ok
Cancel
Reset

↓ ↑ Exclude

Current Criteria:

Figure 31: Searching for a Filtering Category Item

3. Click on the downward-pointing arrow button to add the item selected to the list in the second text area (Figure 32).
4. Repeat steps 2 and 3 to add more than one **Category** item.
Note: If a **Category** item needs to be removed from the second text area, select it from the list in the second text area and click on the upward-pointing arrow button.
5. Click on the **OK** button to apply the filtering to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List or Chart). The system will regenerate and download, to the client's side, an updated report that applies the updated filtering criteria.

DAD Filters

Filter by: 1st Level Implementer

1st Level Implementer

- Action Contre La Faim (ACF)
- Adventist Development and Relief Agency (ADRA)
- Africa Educational Trust (AET)
- African Union- IBAR
- AMISOM
- Cardno Agrisystems Africa Limited.
- Care International
- CARE Netherlands

AFRICAN UNION
Association of European Parliamentarians (AWEPA)

☒ Exclude

Current Criteria:

1st Level Implementer	Is Not	AFRICAN UNION
		Association of European Parliamentarians (AWEPA)

Figure 32: Creating a Sample Filtering Criteria

Note: It is possible to exclude a **Category** item(s) from being included into the filtering criteria to be created. In this case, tick the **Exclude** check box. All the *Category* items that appear in the second text area will be excluded from the filtering criteria to be created.

2.7 ANALYTICS – LESSON 7 - SEARCH

This lesson will guide you through the steps on how to organize **Search** for any relevant information.

2.7.1 Accessing the Search Section

You can view the **Search** section on the left side of the applications (Figure 33).

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APPLICATIONS

- Projects
- MDG Profile

SEARCH

Advanced Search

FILTERS

[Remove Filters](#)
[View Criteria](#)

Filter by:

- [Implementation Status](#)
- [Project Type](#)
- [Funding Agency](#)
- [1st Level Implementer](#)
- [National Counterpart](#)
- [Administrative Region](#)
- [Sector](#)
- [Pillar](#)
- [Year](#)
- [More Filters...](#)

PUBLIC VIEWS

MY VIEWS

- [Sector/Project](#)

List

Show Images | Save As

Modify Current View

Sector / Project	Title	Committed (USD)
Unspecified		83,673,656
ADMINISTRATIVE COSTS OF DONORS		3,841,268
AGRICULTURE		55,627,704
BANKING AND FINANCIAL SERVICES		322,941
BUSINESS AND OTHER SERVICES		14,510,246
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CONSTRUCTION		2,164,286
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GOVERNMENT AND CIVIL SOCIETY		271,849,929
HEALTH		124,500,495
HUMANITARIAN AID		142,966,606
INDUSTRY		10,450,638
MULTISECTOR/CROSS-CUTTING		26,411,540
OTHER SOCIAL INFRASTRUCTURE AND SERVICES		50,663,991
POPULATION POLICIES/PROGRAMMES AND REPRODUCTIVE HEALTH		27,185,790
SUPPORT TO NON- GOVERNMENTAL ORGANISATIONS (NGOs)		4,553,254
TRADE POLICY AND REGULATIONS		1,891,892
TRANSPORT AND STORAGE		152,069
UNALLOCATED/ UNSPECIFIED		26,142,024
WATER SUPPLY AND SANITATION		39,175,262
Total		1,083,165,893

Results 1 - 23 of 23

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Figure 33: Search Section

2.7.2 Simple Search

To find any relevant information quickly and easily within the integrated *DAD Somaliland* content you can type search operators directly into the search box (Figure 33).

2.7.3 Advanced Search

Follow the instructions below to create search criteria:

1. Click the **Advanced Search** link under the *Search* section (Figure 33). The *Advanced Search* form appears (Figure 34).

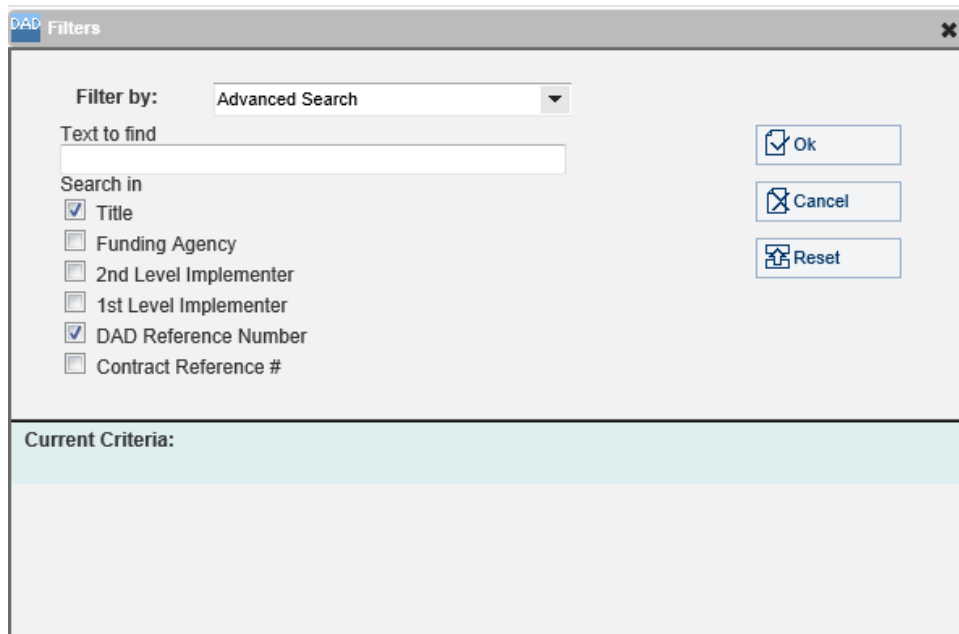
The image shows a software window titled "DAD Filters" with a close button (X) in the top right corner. Inside the window, there is a section labeled "Filter by:" with a dropdown menu currently set to "Advanced Search". Below this is a text input field labeled "Text to find". To the right of this field are three buttons: "Ok" (with a checkmark icon), "Cancel" (with an X icon), and "Reset" (with a circular arrow icon). Under the "Text to find" field is a section labeled "Search in:" followed by a list of checkboxes. The checked options are "Title" and "DAD Reference Number". The unchecked options are "Funding Agency", "2nd Level Implementer", "1st Level Implementer", and "Contract Reference #". At the bottom of the window is a section labeled "Current Criteria:" which is currently empty.

Figure 34: Advanced Search Section

2. Define the text to search for in the appropriate field.
3. Specify the fields to look in by selecting the appropriate checkbox(es).
4. Click the **OK** button to apply the search criteria to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List or Chart).

3. REFERENCES

The following DAD Somaliland documents may provide you with more details on the content and functionality of the sections described in the training lessons:

- DAD Somaliland Analytics User Manual
- DAD Somaliland Projects Application User Manual
- DAD Somaliland MDG Profiles Application User Manual
- DAD Somaliland Administration Center User Manual