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Intended Audience and Overview
This manual is intended for people who want to view information about and/or make updates to CEOS Deliverables in the CEOS Deliverable Tracking Tool.

To ensure that you have the most recent version of this manual please visit deliverables.ceos.org and click “Help”.

What This Manual Covers
- Filtering and sorting deliverables to rapidly find information
- Using the dashboard
- Viewing detailed information about a deliverable
- Making changes to a deliverable

What This Manual Does Not Cover
- Use of the administrator interface
- User account management

For information about these topics consult the Administrator Manual

Disclaimer: All examples presented within were contrived for the purpose of this manual and do not represent any real person or entity. Neither the “Working Group on Website Demonstration (WGWD)” nor the deliverables depicted in this manual can be found in the system.

Finding Information
To access the CEOS Deliverable Tracking Tool, open any web browser (Chrome, Firefox, Internet Explorer, etc.) and navigate to deliverables.ceos.org.

Home Page Overview
Figure 1 below shows what the top of the home page looks like.

The top of the home page can be broken into the following parts:

- Navigates to the home page.
- Navigates to the home page.
- Takes you to your personal dashboard page after you have logged in.
- Downloads the latest version of this manual.
- Navigates to the login page. If you are logged in, you will see here instead.
Figure 2 below shows the filters that can be applied to the list of deliverables. Filtering is discussed in more detail below.

![Figure 2](image)

Figure 3 below displays the column headings for the list of deliverables. Each of the headings can be clicked to sort the column below into ascending/descending order. Sorting is discussed in more detail below.

![Figure 3](image)

Figure 4 below shows the bottom of the home page:

![Figure 4](image)

Deliverables are split across several pages to make the list easier to manage (Figure 4).

- Shows the previous page. This button is not shown on the first page.
- Shows the next page. This button is not shown on the last page.
- Skips directly to the numbered page. The currently selected page is highlighted in blue. The number of pages shown depends on the currently applied filter.

Download: [CSV] [JSON] [XLS] Downloads all pages of deliverables using the currently applied filter and sort as one of three possible formats. CSV and JSON are commonly used for automated processes and XLS is the Microsoft Excel file format. XLS is the best choice for most users.

Filtering and Sorting
Filtering and sorting can be combined to quickly find any deliverable or set of deliverables.

By default, the home page is filtered to show open deliverables and sorted in ascending order by deliverable number.

To restore the default settings, click the CEOS icon on the top left of the page or the “Home” link on the top right of the page.

Filtering
Filters can be created using any combination of the available fields. Selecting a filter is opting to only display deliverables that meet the criteria selected, in essence, saying: “Show me all deliverables that look like this”. Consider the following example filter (Figure 5):

![Figure 5](image)
The filter above can be read as “Show me all deliverables that are open, were created in the year 2021, and belong to the ‘WD (Website Development)’ Category”.

If the filter does not apply automatically, click the “Apply Filter” button to the right.

**Sorting**

Deliverables can be sorted in ascending or descending order by clicking on any of the blue column headings. The list of deliverables can only be sorted by one column at a time.

**Viewing Details**

To get more detailed information about a deliverable, click on the title:

![Table of Deliverables]

This will bring up the details page for the deliverable (Figure 7):

![Details Page]

**Email**

Emails a link to the deliverable. Clicking it creates an email pre-populated with the deliverable title, the subject of “CEOS Deliverable Tracking”, a link to the deliverable, and the Responsible Users’ emails in the CC field. The exact behavior depends on how a person’s computer is configured. For example, a Windows computer may open Microsoft Outlook while an Android phone may open Gmail.

**Copy Link Location**

Copies a link to the deliverable to the clipboard. This can be used to paste a link to the deliverable into other documents and applications. If clicking the button does not work, right-click and select “Copy Link Location” from the context menu.
Using the Dashboard

The dashboard is the best place to find all deliverables relevant to you. To view your dashboard, you must first log in.

Once logged in, the dashboard shows the following (Figure 8):

<table>
<thead>
<tr>
<th>Task</th>
<th>Assigned To</th>
<th>Status</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>000-2010 Count User Manual</td>
<td>Jane Doe</td>
<td>Open</td>
<td>March 16, 2021</td>
</tr>
<tr>
<td>000-2010 Count Administration Manual</td>
<td>Joe Smith</td>
<td>Open</td>
<td>March 16, 2021</td>
</tr>
</tbody>
</table>

Figure 8

Jane Doe’s dashboard shows all deliverables for which she is either:

1. Listed as one of the Responsible Users.
2. Allowed to act on behalf of one of the CEOS Entities responsible for the deliverable.

Clicking a name will compose an email to that person.

Clicking a deliverable will show the details page for that deliverable (see Figure 16).

Logging In

To log in, click log in. This will display the login page (Figure 9).

Figure 9

Username – the email address associated with the account.

Password – the account password.

Note: Always make sure to Log Out, especially when using a shared or public computer.

Forgot Password

If you forget your password, you can reset your password using a link on the login page:

1. Navigate to the login page and click the “Forgot your password?” link in the lower right corner.
2. Enter your email address in the text field and click the “Send me instructions!” button.

3. Check your email account for an email from noreplies@deliverables.ceos.org with the subject “Password reset on deliverables.ceos.org”. If you do not see the email, check your spam/junk folder as it may have been sent there.

4. Open the email and click on the first link to reset your password. Note: the email content may vary depending upon your email provider’s settings. However, it will still function the same.

   You're receiving this email because you requested a password reset for your user account at deliverables.ceos.org.
   
   Please go to the following page and choose a new password:
   
   [http://deliverables.ceos.org/accounts/reset/MzQz/5oz-c694e24c32e65fae7b13/](http://deliverables.ceos.org/accounts/reset/MzQz/5oz-c694e24c32e65fae7b13/)

   Your username, in case you've forgotten: jane.doe@noreplies.com

   Thanks for using our site!

   The CEOs Deliverables team

   [http://deliverables.ceos.org](http://deliverables.ceos.org)
5. Complete the change password form by entering and confirming your new password and then click the “Change my password” button.

![Change Password Form](image1)

6. You will be directed to the confirmation page. You can now log in using your new password.

![Confirmation Page](image2)

**Forgot Username**

If you forget your username, there are a couple of ways to find out what it is:

1. You can ask someone else to log in to their account and find one of your deliverables. That person can hover over your name and reveal your username (see Figure 16).

2. You can send an email via the Contact Us form on the CEOS website ([https://ceos.org/contact-us/](https://ceos.org/contact-us/)) and request your Deliverables Tracking Tool username.
Making Changes to Deliverables
Two things must be true of any person wishing to change a deliverable:

1. They must be logged in.

2. Their name must appear under Responsible Users or they must be designated in the system as allowed to act on behalf of one of the CEOS Entities listed under Responsible CEOS Entities on the deliverable they wish to change.

For example:

![View Deliverable](image)

*Figure 15*

The people who can change the deliverable in Figure 15 include Jane Doe and anyone designated in the system as allowed to act on behalf of WGWD.
Once logged in, you will notice three new buttons and the names of the Responsible Users in blue text (Figure 16).

![View Deliverable](image)

**Figure 16**

- **Mark Closed** sets the status to Closed. This can only be undone by an administrator.

- **Jane Doe** clicking a Responsible Users’ name creates a pre-populated email to that person (in this case Jane; Figure 17).

![Add Progress Report](image)

**Figure 17**

- **Add Progress Report** opens a screen that can be used to add a new progress report to a Deliverable (Figure 18).
Opens a screen that can be used to add a new comment to a Deliverable (Figure 19).

Progress Reports and Comments show the name of the creator and the date and time they were created (Figure 20).
Any additional changes to a deliverable must be made by an administrator through the administrator interface, which is not covered in this manual.