

CEOS Deliverable Tracking Tool 2.0: User Manual

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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.

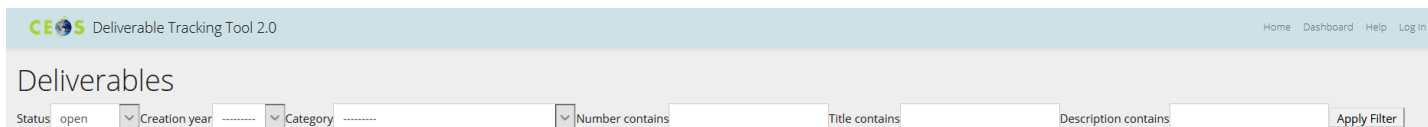


Figure 1

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

- CEOS Deliverable Tracking Tool 2.0** Navigates to the home page.
- Home** Navigates to the home page.
- Dashboard** Takes you to your personal [dashboard](#) page after you have logged in.
- Help** Downloads the latest version of this manual.
- Log In** Navigates to the login page. If you are logged in, you will see **Log Out** here instead.

Figure 2 below shows the filters that can be applied to the list of deliverables. [Filtering](#) is discussed in more detail below.

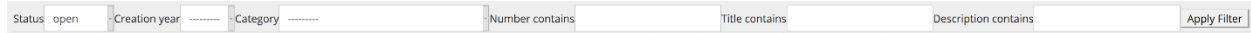


Figure 2

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

Figure 4 below shows the bottom of the home page:



Figure 4

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.



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):

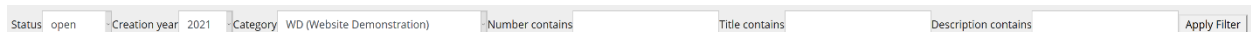


Figure 5

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

Number	Title	Status	Creation year	Completion date	Description
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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:

Number	Title	Status	Creation year	Completion date	Description
WD-21-01	Create User Manual	open	2021	2021 Q1	Create a user manual geared towards regular users that explains how to use the...
WD-21-02	Create Administrator Manual	open	2021	2021 Q1	Create a manual geared towards administrators that explains how to use the...

Figure 6

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

View Deliverable

WD-21-01: Create User Manual

[Share](#) [Permalink](#)

Number: WD-21-01
Title: Create User Manual
Status: Open
Creation Year: 2021
Completion Date: 2021 Q1 (38 days remaining)
Description:
Create a user manual geared towards regular users that explains how to use the Deliverables Tracking Tool.

Link to GEO Work Programme:
External Reference:
Responsible Users: Jane Doe
Responsible CEOS Entities: WGWD
Contributing Agencies:
Progress Reports:
Comments:
Actions:
Created: 2021-02-09 17:49:31 UTC
Last Updated: 2021-02-09 17:49:31 UTC

Figure 7

[Share](#) 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.

[Permalink](#) 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):

User Dashboard: jane.doe@noreplies.com

Task	Assigned To	Status	End
WD-21-01 Create User Manual	• Jane Doe	Open	March 19, 2021
WD-21-02 Create Administrator Manual	• Joe Smith	Open	March 19, 2021

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.

Log In

Username*

Password*

Log In

Forgot your password?

Figure 10

2. Enter your email address in the text field and click the “Send me instructions!” button.

Password Reset

Enter your email address below, and we'll send instructions for resetting your password.

Email*

jane.doe@noreplies.com

Send me instructions!

Figure 11

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/>

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

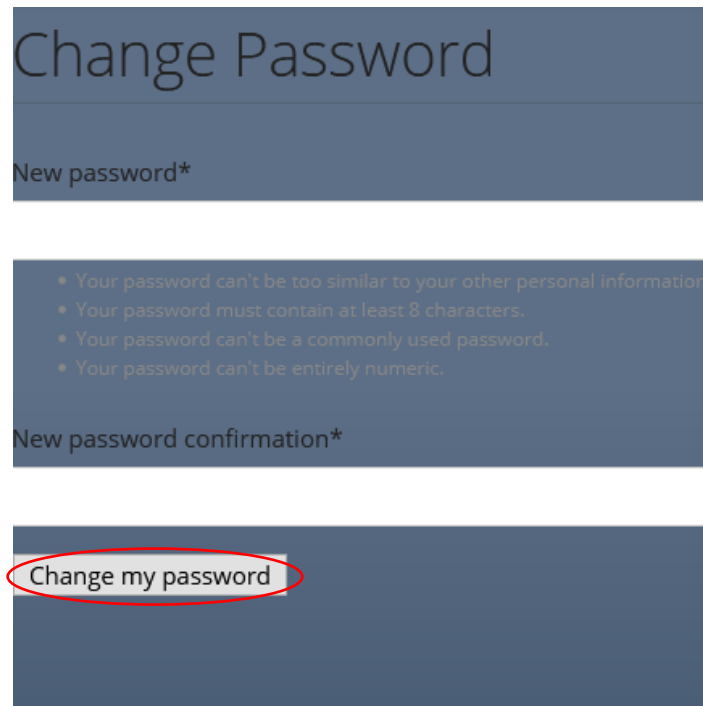
Thanks for using our site!

The CEOS Deliverables team

<http://deliverables.ceos.org>

Figure 12

5. Complete the change password form by entering and confirming your new password and then click the “Change my password” button.



Change Password

New password*

- Your password can't be too similar to your other personal information.
- Your password must contain at least 8 characters.
- Your password can't be a commonly used password.
- Your password can't be entirely numeric.

New password confirmation*

Change my password

Figure 13

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

log in page.' The 'log in page' link is highlighted in blue." data-bbox="238 598 749 689"/>

Change Password

Your new password has been set. You can log in now on the [log in page](#).

Figure 14

Forgot Username

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

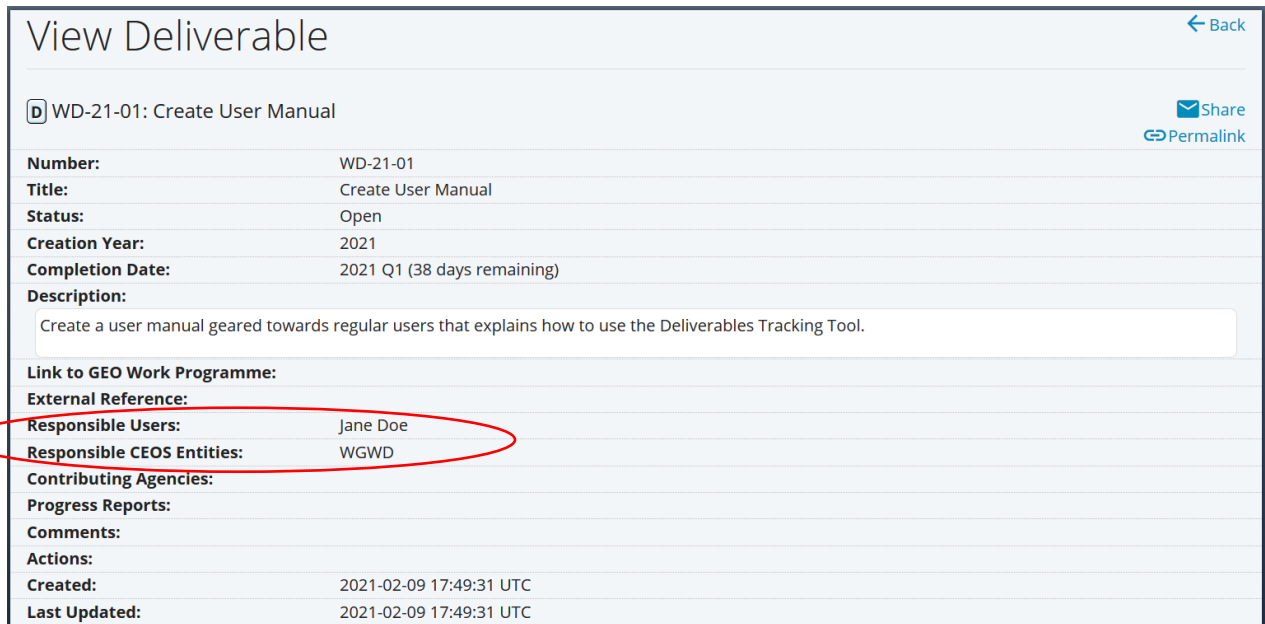
1. You can ask someone else to log in to their account and find one of your deliverables. That person can hover over your name and reveal your username (see Figure 16).
2. You can send an email via the [Contact Us](https://ceos.org/contact-us/) form on the CEOS website (<https://ceos.org/contact-us/>) 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 [← Back](#)

WD-21-01: Create User Manual [Share](#) [Permalink](#)

Number:	WD-21-01
Title:	Create User Manual
Status:	Open
Creation Year:	2021
Completion Date:	2021 Q1 (38 days remaining)
Description:	Create a user manual geared towards regular users that explains how to use the Deliverables Tracking Tool.
Link to GEO Work Programme:	
External Reference:	
Responsible Users:	Jane Doe
Responsible CEOS Entities:	WGWD
Contributing Agencies:	
Progress Reports:	
Comments:	
Actions:	
Created:	2021-02-09 17:49:31 UTC
Last Updated:	2021-02-09 17:49:31 UTC

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).

The screenshot shows the 'View Deliverable' interface. At the top right is a 'Back' button. Below the title 'View Deliverable' is a breadcrumb 'WD-21-01: Create User Manual' with a 'Share' and 'Permalink' button to its right. The main content area is a table with the following fields: 'Number: WD-21-01', 'Title: Create User Manual', 'Status: Open', 'Creation Year: 2021', and 'Completion Date: 2021 Q1 (38 days remaining)'. A 'Mark Closed' button with a checkmark icon is circled in red. Below this is a 'Description' field containing the text 'Create a user manual geared towards regular users that explains how to use the Deliverables Tracking Tool.' Further down are sections for 'Link to GEO Work Programme:', 'External Reference:', 'Responsible Users: Jane Doe' (circled in red), 'Responsible CEOS Entities: WGWJD', and 'Contributing Agencies:'. Below these are 'Progress Reports:' with an 'Add Progress Report' button (circled in red) and 'Comments:' with an 'Add Comment' button (circled in red). At the bottom, the 'Actions:' section shows 'Created: 2021-02-09 17:49:31 UTC' and 'Last Updated: 2021-02-09 17:49:31 UTC'.

Figure 16



Sets the status to Closed. This can only be undone by an administrator.



Clicking a Responsible Users' name creates a pre-populated email to that person (in this case Jane; Figure 17).

The screenshot shows a pre-populated email form. It has a 'Send' button on the left. The 'To' field is filled with 'jane.doe@noreplies.com'. The 'Cc' field is empty. The 'Subject' field is filled with 'CEOS Deliverable Tracking'. Below the form, the text 'WD-21-01:Create User Manual' is followed by a blue hyperlink: 'http://127.0.0.1:8001/task_manager/deliverables/673/'.

Figure 17



Opens a screen that can be used to add a new progress report to a Deliverable (Figure 18).

Update Progress [← Back](#)

Text*

Font | Size | **B** *I* U ~~S~~ x x | A A | | | |

body p

Figure 18

[Add Comment](#) Opens a screen that can be used to add a new comment to a Deliverable (Figure 19).

Add Comment [← Back](#)

Text*

Font | Size | **B** *I* U ~~S~~ x x | A A | | | |

body p

Figure 19

Progress Reports and Comments show the name of the creator and the date and time they were created (Figure 20).

Jane Doe | 2021-02-09 21:07:40 UTC

Completed first draft. On track to finish before the deadline.

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.