# Overview

Project Statements allow country programmes to sketch what projects they would like to implement without going through an extensive design process before funding is secured. These statements can then be made visible to fundraisers by extracting them from Project Center by following the steps in this document. At present it is not possible to run a report directly from Project Center to be shared so we need to extract the data from the full data export and turn it into a webpage.

The basic flow of data is as follows: PC -> Data Warehouse -> Excel -> HTML file -> Sharepoint

This is a fairly convoluted process and may take some time and expertise to run for the first time.

# Step by step guide:

1. Export a data file from Project Center using the Administration section. See the separate guidance **WA\_Backing\_Up\_Project\_Center**
2. Have the Performance and Insight Team (Graham Marsh) load this data into the data warehouse staging area database **Store\_Pro\_PC**

*Note: Alternatively you may load this data export into a SQL database on your on PC using the SQL Server Management Studio*

[Note: the aim is to automate the refreshing of this database before 2018 after which you may skip to 3]

1. Open the workbook ProjectStatements.xlsx when you are connected to the WaterAid network. The file will automatically refresh the data from Store\_Pro\_PC. If you have issues or want to use your local SQL Server, adjust settings in Excel through the Data -> Connections section. 
2. Copy the data from the table to a new file called **ProjectStatements.xlsx**. Note that the following code will be expecting to find a file called exactly that.
3. Sort the table in alphabetical order by country
4. Make adjustments to the file if necessary: Reformat the target funding currency and optionally remove HTML tags from it.
5. Save the **ProjectStatementsExcelToHTML.py** to your computer in the same folder where the **ProjectStatements.xlsx** file is



1. Run the script in Python 3.6.0 or greater (not 2.7). See Python installation instructions here: <https://www.ics.uci.edu/~pattis/common/handouts/pythoneclipsejava/python.html>

You can also use Pycharm Community Edition, an excellent development environment. Make sure you have the **openpyxl** library installed.

This looks for a ProjectStatements.xlsx file in the same folder as the ProjectStatementsExcelToHTML.py file and outputs a file called **Project Statements.aspx** into the directory where the .py file is.

1. Sometimes manual cleanup may be necessary if something has gone awry with the HTML, for example if an image has been inserted into the Project Statement this seems to break the formatting. In that case you will need to manually review that part of the HTML and resolve the issue.
2. Load the cleaned up **Project Statements.aspx** file to the PMER website under Core Documents -> Reports

A prepared report example is here:



In the event that the Sharepoint report gets corrupted, an older webhosted example report here: <http://autio.github.io/projects/projectstatements/>

In the future as PowerBI improves or as a suitable custom component for it is built or found, or if Newdea improve their reporting, this solution can be abandoned.

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# Rationale / background:

Project Statements are stored as HTML-tagged templates on Project Center. These do not come out well into the custom reports in PC when we want a list of them. When outputting a list of them only the first section of the template comes through. A better way to display the statements would be a web-page where the templates are expandable. To get the full data we use the .bak file export which contains all tables of PC data. The Project Table however doesn't itself contain all the information we want in the output report so some querying is needed. This view onto the data can be then used to populate an Excel file which a user can then check. The data should be cleaned of any un-edited project statement templates, i.e. templates that have not been filled in with actual project statements.

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